

**PAYCHEX<sup>®</sup>**

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# Paychex PST 1000 User Guide



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# Paychex PST 1000 User Guide

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## Introduction

### Welcome

Welcome to Paychex® PST 1000 software!

Use this guide to learn how to use your Paychex PST 1000 to perform essential tasks that make tracking employee time and your payroll processes more efficient.

The Paychex PST 1000 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 PST 1000 time clock can be connected directly to your computer by USB or to your network by Ethernet. For instructions on connecting your employee time clock, refer to the *Paychex PST 1000 Quick Start Guide* that came in your employee time clock package.

### System Requirements

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

**Note:** If you are using your Paychex PST 1000 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 PST 1000 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 PST 1000 Quick Start Guide* on the Setup Wizard and Documentation CD supplied with the time clock or within the time clock application from the Help menu.

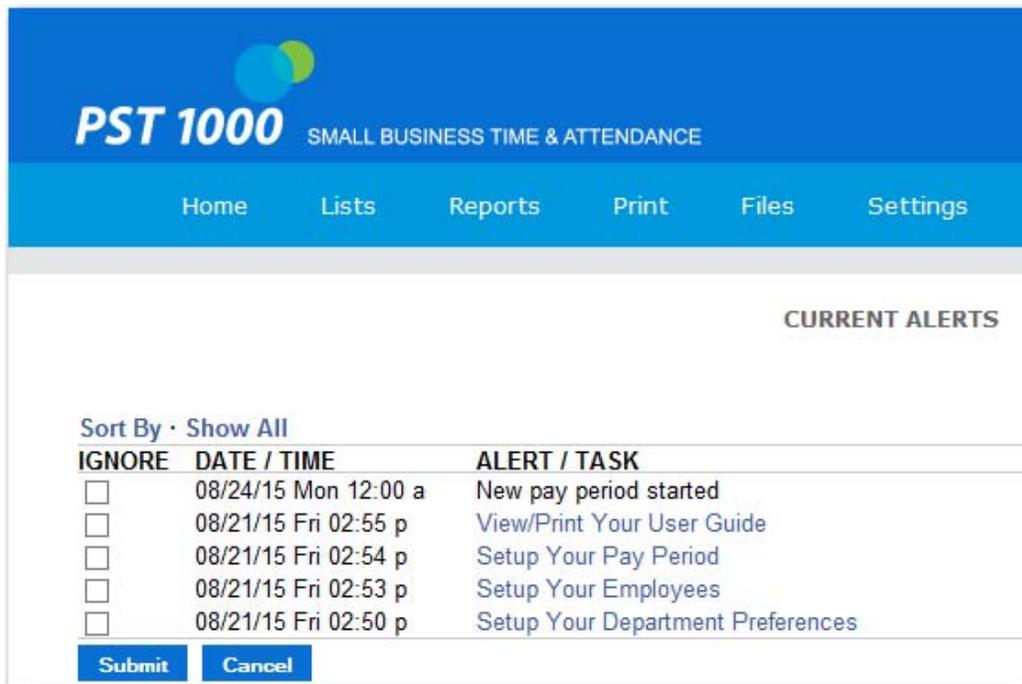
### Support and Troubleshooting

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 Paychex Time and Attendance Support Center at 1-877-234-1851.

## Getting Familiar with Paychex PST 1000

The Paychex PST 1000 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 PST 1000 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, select 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, supervisors, or enabling or disabling additional time clocks connected to the system. Refer to Employee Maintenance in Section 3, Setting Up Your Employees, Department Maintenance, and Connecting Additional Time Clocks in Section 6.

## Reports Menu

The Paychex PST 1000 application has four reports that make it quick and easy to get the information you need to complete your work. Use the Reports menu to access Timecard, Attendance, Department, and Timecard by Department reports. In addition, with the **Create Report** option, you can run custom filters for specific punch times, dates, employees, and departments. 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 backups, remove unneeded data, and update your employee time clock. Refer to Section 5, Maintaining Your Time Clock, for additional information on time clock maintenance.

## Settings Menu

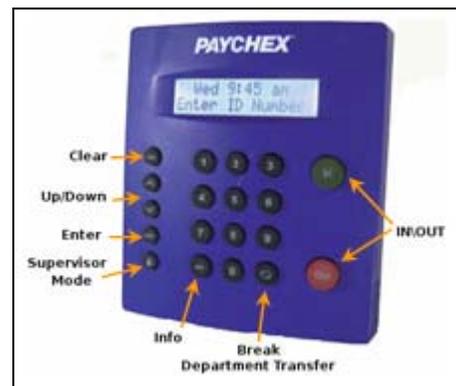
Use the Settings menu to customize your payroll, overtime, punch, device, and alert preferences. Before running any reports, set your preferences as described in Section 2, Setting Your Time Clock Preferences.

## 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 Time 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 time clock and punch out on a different 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.
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 time 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 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 PST 1000 includes 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.

**Note:** This option must be activated for each individual employee, as discussed in Section 3, Setting Up Your Employees.

## 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.

**Note:** To track an employee's time by department, an employee must have the department assigned to them. Refer to Section 3, Setting Up Your Employees for instructions.

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.

## Entering Tips, Job Numbers, or Piece Counts (Sign In and Employee Input)

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

**Note:** This option must first be enabled under Punch Preferences as discussed in Section 2, Employee Input Preferences, then be activated for each individual employee, as discussed in Section 3, Setting Up Your Employees.

Employee Inputs can be configured to collect data on either the In punch or Out punch. Follow the instructions below to collect employee input data on the in punch.

### Collecting Employee Inputs on an In Punch

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

### Collecting Employee Inputs on an Out Punch

1. Enter the assigned PIN/badge number at the time clock or wave the proximity badge in front of the number pad, then press **Out**.
2. Press **Enter**.
3. When prompted, enter the Employee Input value.
4. Press **Enter**.

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## 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, then select the date when 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, then select the date when your current pay period started.
6. Click in the **Next Pay Start** field to open the calendar, then select the date when your next pay period starts.
7. Type the time of day when 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.

The screenshot shows the 'PREFERENCES' window with the 'Pay' tab selected. The 'COMPANY INFORMATION' section includes 'Company Name' (ABC123) and 'Client ID' (ABCD1234). The 'PAYROLL PREFERENCES' section includes 'Pay Period Type' (Bi-Weekly), 'Last Pay Start' (08/10/15), 'This Pay Start' (08/24/15), and 'Next Pay Start' (09/07/15). The 'OVERTIME PREFERENCES' section includes 'Day Start' (12:00a), 'Week Start' (Sun), and 'OVERTIME PREFERENCES' with fields for 'Day OT1 After' (99.00), 'Day OT2 After' (99.00), 'Week OT1 After' (40.00), 'Week OT2 After' (99.00), and 'Consecutive Day OT' (No). The window has 'Submit' and 'Cancel' buttons at the bottom.

8. Select the day of the week when 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 PST 1000 comes standard with two levels of daily, weekly, and consecutive day overtime.

Follow the instructions below to set your Overtime Preferences.

OVERTIME PREFERENCES		
Day OT1 After	<input type="text" value="8.00"/>	Hours
Day OT2 After	<input type="text" value="99.00"/>	Hours
Week OT1 After	<input type="text" value="40.00"/>	Hours
Week OT2 After	<input type="text" value="99.00"/>	Hours
Consecutive Day OT	<input type="button" value="No"/>	
Consecutive Day OT After	<input type="text" value="99"/>	Days
Consecutive Day OT1 After	<input type="text" value="99.00"/>	Hours
Consecutive Day OT2 After	<input type="text" value="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 pays 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.

**Note:** Making a change to the overtime options prompts the time clock to restart. Restarting makes the time clock unavailable up to or exceeding 15 minutes.

## Setting Your Punch Preferences

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

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.

Pay	Punch	Device	Alerts	User
<b>PUNCH PREFERENCES</b>				
Rounding Type		<input type="button" value="None"/> <input type="button" value="15 minute"/> <input type="button" value="15 minute slant"/> <input type="button" value="10th hour"/>		
Automatic Punches become IN at		<input type="text" value="15.00"/> Hours		
Flag edits on reports		<input checked="" type="checkbox"/>		
Reject Like Punches within		<input type="text" value="2"/> Minutes		

The available rounding types are:

- **None:** (No Rounding) Accumulates 100% of all time registered on the time 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.

#### 10<sup>th</sup> Hour Chart

Minutes	Minutes
00-05 = .0	30-35 = .5
06-11 = .1	36-41 = .6
12-17 = .2	42-47 = .7
18-23 = .3	48-53 = .8
24-29 = .4	54-59 = .9

**To Illustrate:** An in punch from :00 minutes after the hour to :05 after the hour rounds to the top of the hour (:00).  
An in punch from :30 minutes after the hour to :35 minutes after the hour rounds to :50.

**Example:** An in punch at 7:35 a.m. calculates as 7.5 a.m.  
An out punch at 4:05 p.m. calculates as 4.0 p.m.

**Note:** Making a change to the rounding options prompts the time clock to restart. Restarting makes the time clock unavailable up to or exceeding 15 minutes.

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.

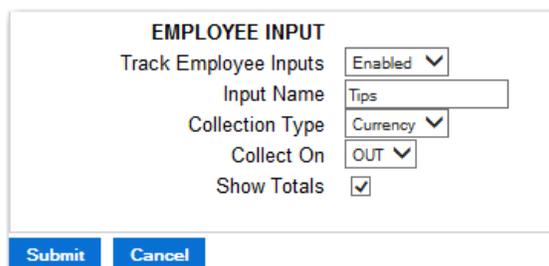
This option is **only** used when an employee entry method is set to Automatic. Refer to Section 3, Setting Up Your Employees, for additional information.

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 time clock. Within the minutes specified, the second punch is ignored.
5. Click **Submit** to save your settings and return to the Home page.

## Setting Employee Input Preferences

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



**EMPLOYEE INPUT**

Track Employee Inputs

Input Name

Collection Type

Collect On

Show Totals

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

Follow the instructions below to set your Employee Input Preferences.

1. Enable employee inputs by selecting **Enabled** from the **Track Employee Inputs** drop-down menu. Additional Employee Input options display.
2. Enter a custom name for the employee input. Common names may be Tips, Job #, or Piece Counts.
3. Select the applicable collection type from the **Collection Type** drop-down menu.
  - **Currency:** Used for collecting tips or other currency related data.
  - **Number:** Used for collecting any non-currency related numerical data. For example, piece counts or job numbers.
4. To determine if the employee enters the data on the In punch or Out punch, select the applicable collect on value from the **Collect On** drop-down menu.
5. If you want to total the data on the timecard report, check the **Show Totals** checkbox.

## 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.

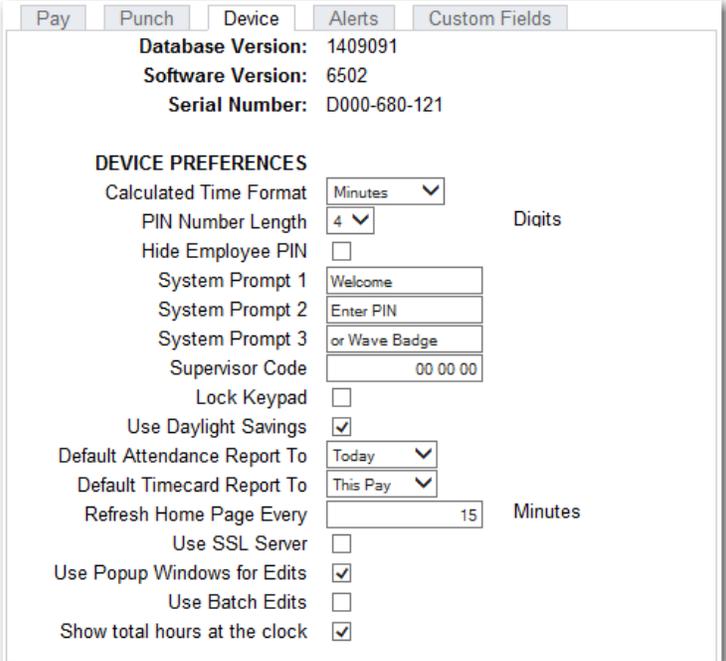
1. Select if you want to display minutes on your reports in decimal or hh:mm (minutes) format from the **Calculated Time Format** drop-down menu.
2. Select the length of the custom employee PIN (ID number) from the **PIN Number Length** drop-down menu. Customize employee PINs (ID numbers) in the **Edit 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 six-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 time 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.



Pay Punch **Device** Alerts Custom Fields

**Database Version:** 1409091  
**Software Version:** 6502  
**Serial Number:** D000-680-121

**DEVICE PREFERENCES**

Calculated Time Format Minutes

PIN Number Length 4 Digits

Hide Employee PIN

System Prompt 1 Welcome

System Prompt 2 Enter PIN

System Prompt 3 or Wave Badge

Supervisor Code 00 00 00

Lock Keypad

Use Daylight Savings

Default Attendance Report To Today

Default Timecard Report To This Pay

Refresh Home Page Every 15 Minutes

Use SSL Server

Use Popup Windows for Edits

Use Batch Edits

Show total hours at the clock

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 to 10 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 time 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.
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.

**Multi-clock Preferences:** Multi-clock refers to set up that includes multiple time clocks connected together to share one software. For additional information on setting up multi-clock preferences, refer to Section 6, Additional Functionality.

**Web Punch Preferences:** Set Web Punch Preferences settings when web punching is allowed. For additional information on setting up your Web Punch Preferences, refer to Section 6, Additional Functionality.

**SMTP Preferences:** SMTP Preferences (Outgoing Email Settings) should be customized if you want to receive automatic email alerts or email the Timecard Report to an individual. An SMTP server is a computer that receives outgoing mail messages from users and routes the emails to their intended recipients. For additional information 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.

Field	Value	Unit
Alert Low Hours at	0.00	Hours per punch
Alert High Hours at	14.00	Hours per punch
Alert Day Overtime OT at	1.00	Hours remaining
Alert Week Overtime OT at	1.00	Hours remaining
Check Alerts Every	15	Minutes
Email Alerts Every	15	Minutes
Email Daily Alerts at	12:00a	

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. To disable this alert, set the alert value to **0**.
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. To disable this alert, set the alert value to 99.
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 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 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 email alerts in the **Email Alerts Every** field.
7. Set the time of day you want daily alert emails 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 PST 1000 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, then complete the applicable field, as needed.

## Alert Setup

1. Using the Alert Preferences set earlier, select **Settings | Alerts Setup**, then follow the instructions below to set up Home page and email alerts.
  - **Enabling/Disabling Alerts:** To disable an alert, deselect the checkbox in the far left column. This prevents the alert from posting on the Home page or emailed.

**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 want an email alert sent from this drop-down menu.
  - **Repeat:** Select how often you want an email alert to be resent from this drop-down menu.
  - **Recipient:** Type the alert recipient's email address. For multiple addresses, add a space or comma in between each email address.
2. Click **Submit** to save your settings and return to the Home page.

<input checked="" type="checkbox"/>	DESCRIPTION	LIFETIME	E-MAIL	REPEAT	RECIPIENT
<input checked="" type="checkbox"/>	High Hours	8 Hours	Never	Never	
<input checked="" type="checkbox"/>	Low Hours	8 Hours	Never	Never	
<input checked="" type="checkbox"/>	Approaching Daily Overtime	8 Hours	Never	Never	
<input checked="" type="checkbox"/>	Approaching Weekly Overtime	1 Day	Never	Never	
<input checked="" type="checkbox"/>	Check for Updates	Forever	Never	Never	
<input checked="" type="checkbox"/>	Backup Reminder	1 Week	Never	Never	
<input checked="" type="checkbox"/>	Punch Notify	1 Hour	Never	Never	

---

# 3 Setting Up Your Employees

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## Setting Up Your Employees

For your employees to use the Paychex PST 1000 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.

EMPLOYEE LIST								
							Employees:	
							Time Remaining Before Overtime	
Active	Paychex Employee ID	Employee ID	Last Name	First Name	M.I.	Web Punch	Daily	Weekly
<input checked="" type="checkbox"/>		7	Smith	John				40.00
<input checked="" type="checkbox"/>	1	001	Melton	Ron				40.00
<input checked="" type="checkbox"/>	2	2	Gravante	Carol	I			29.25
<input checked="" type="checkbox"/>	4	004	Burns	Jim				20.00

**Make Employees Inactive:** Making an employee inactive removes them from the Employee List and hides the employee data from the reports.

Inactive employee punch data remains stored in the application.

- To make an employee inactive, deselect the checkbox in the far left column, then click **Submit**.
- To select all employees and make them active, click **Select All**.
- To make all employees inactive, click **Select None**.
- To display inactive employees, click **Show Inactive**.

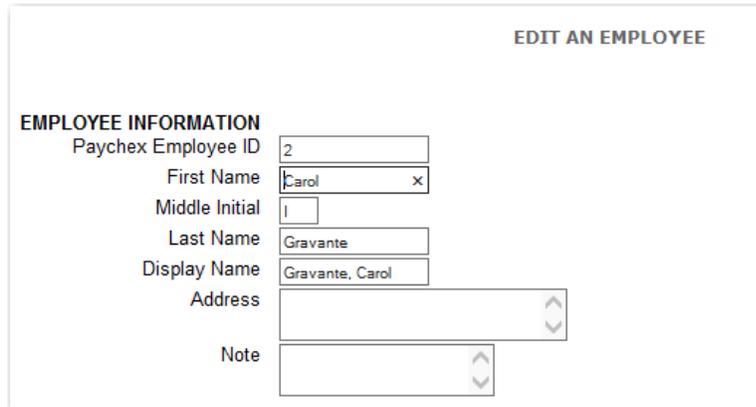
#### Time Remaining Before Overtime:

- The **Daily** column displays the number of hours remaining in the day before the employee starts earning daily overtime.
- The **Weekly** column displays the number of hours remaining in the week before the employee starts earning weekly overtime.
- The **Consecutive Days** column displays the number of days remaining in the work week before the employee starts earning consecutive day overtime.

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

## 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.



The screenshot shows a web form titled "EDIT AN EMPLOYEE". Under the heading "EMPLOYEE INFORMATION", there are several input fields: "Paychex Employee ID" with the value "2"; "First Name" with "Carol" and a clear button (x); "Middle Initial" with "I"; "Last Name" with "Gravante"; "Display Name" with "Gravante, Carol"; "Address" with an empty field and a vertical scroll arrow; and "Note" with an empty field and a vertical scroll arrow.

### 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:**

**EMPLOYEE SETTINGS**

Employee ID

PIN/Badges

Departments

DEPT	TRACK TIPS	ORDER
Break <input type="button" value="v"/>	<input type="checkbox"/>	
Office <input type="button" value="v"/>	<input type="checkbox"/>	<input type="text" value="1"/>
Add Department <input type="button" value="v"/>	<input type="checkbox"/>	<input type="text" value="3"/>

Active

Entry Method

Start Date

- **Employee ID:** Type the assigned company Employee ID number. This may be the same as the Paychex Employee ID number.
- **PIN/Badges:** The employee PIN number is used to clock in or out at the time clock. Type the custom PIN you want to assign to the employee. The default PIN length is set to 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 time clock. If you are tracking paid breaks, set the first department to **Break**. For additional information on setting up departments, refer to Section 6, Additional Functionality.

If Employee Inputs are enabled under Punch Preferences, an additional checkbox in the Departments table to track employee input displays.

DEPT	TRACK TIPS	ORDER
Break <input type="button" value="v"/>	<input type="checkbox"/>	
Office <input type="button" value="v"/>	<input type="checkbox"/>	<input type="text" value="1"/>
Add Department <input type="button" value="v"/>	<input type="checkbox"/>	<input type="text" value="3"/>

For additional information on setting up departments, refer to Section 6, Additional Functionality.

**Start Date:** Enter the start date for the employee. Use format: mm/dd/yyyy.

**Active:** All employees default to an active status. Deselect this checkbox to make the employee inactive and to hide their name from reports.

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

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 are 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. For additional information on punches, refer to Section 4, Generating Reports.

**Lunch Time Deduction:**

<b>LUNCH TIME DEDUCTION</b>	
Automatic Lunch Deduction	Enabled ▾
Lunch At	4.00 Hours
Lunch Length	30 Minutes
Deduct	Per Punch ▾

- Enable **Automatic Lunch Deduction** to have the time clock automatically deduct the employee lunch time for the day or the punch pair.
- In the **Lunch At** field, enter the number of hours the employee is required to work before the lunch period automatically deducts from the employee's shift.
- Enter the amount of time in minutes to deduct for lunch (typically 30 to 60 minutes) in the **Lunch Length** field.
- **Deduct:**
  - When **Per Punch** is selected, the time worked from the last In punch calculates the lunch deduction time. If an employee goes on break or punches out before the lunch time is deducted, the **Lunch At** trigger starts again.
  - When **Per Day** is selected, the total amount of the employee's hours for the day adds up to determine if the **Lunch At** threshold was met. The lunch deduction occurs after the threshold is met.

Only one lunch deduction occurs per day when **Deduct** is set to Per Day. Manually entering a lunch deduction prevents an automatic lunch deduction from occurring that day.

**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 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 set up.

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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 PST 1000 uses “Click-and-Edit” reports. This means you can edit the employee and punch data directly from the report. Most of the text displayed on reports is web links that open additional screens or editing options.

### Reports Overview

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.

- **Attendance Report** displays all employee punch data sorted by date.
- **Timecards Report** displays punches and hours info sorted by employee.
- **Department Report** displays punches and hours sorted by department.
- **Timecards by Dept.** displays employee punches and hours sorted first by employee, then by department.
- **Create Report** allows you to customize the report based on employee, date, time, and department filters.

EMPLOYEE	TIME IN	DEPT	TIME OUT
From: 08/24/15 Thru: 08/24/15 <a href="#">Add Punch</a> <a href="#">Add Non-Work</a>			
08/24/15			
2-Gravante, Carol	Mon 08:00aE	Work	<a href="#">Add Punch</a>

If Track Employee Inputs is enabled under Punch Preferences, the reports contain an additional column displaying the employee input values entered by the employees.

### Adding a Punch

From any report, click **Add Punch** at the top of the report to add a new punch. You can 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.

**ADD NEW PUNCH**

Employee 2-Gravante, Carol

Flags

Type

Date

Time  ▲▼

Lunch  Minutes

Adjust  Hours

Tips

Note

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.
2. Select the punch type 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 want 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.

From: 08/24/15 Thru: 08/24/15 [Add Punch](#) [Add Non-Work](#)

EMPLOYEE	TIME IN	DEPT	TIME OUT	LCH	ADJ	REG	OT1
08/24/15							
2-Gravante, Carol	Mon 08:00aE	Work	+Mon 05:00pE	60min	1:00	9:00	
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 occurred with that punch. A plus sign (+) accompanies that punch.
9. Click **Submit** to save your changes.

## Adding Non-Work Hours (Holiday, Vacation, Sick Time)

From the Attendance, Timecard, or Department Report screen, click **Add Non-Work** at the top of the report to add a non-work punch. A non-work punch is a punch where the employee was not actually working, but was using benefit time. For example: holiday, vacation, or sick time.

Non-work hours can be assigned to one or more employees across one or more days.

When importing hours to Paychex Online Payroll, the benefit time automatically deducts from the accrued time if you signed up for Paychex Online Payroll Time Off Accruals.

Perform the following when adding a non-work punch:

1. Select **Add Non-Work** from the Timecard Report.
2. Select the employee(s) from the **Select Employees** list.
3. Select the applicable punch type you want to add from the **Type** drop-down menu.

The available punch types are:

- **Holiday**
- **Vacation**
- **Sick**

4. Click in the **Start Date** field to use the calendar to select the date when the non-work hours should begin.
5. Type the number of days you want to assign to the selected employee(s) in the **Number of Days** field.
6. Type the number of hours you want to assign to the selected employee(s), each day for the time period specified, in the **Hours Per Day** field.
7. If you selected only one employee, select the department where you want to assign the non-work hours to in the **Department** drop-down menu. If you selected more than one employee, the **Department** drop-down menu auto-populates and hours are assigned to each employee's default department.
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.

2-Gravante, Carol									
DATE	TIME IN	DEPT	TIME OUT	LCH	ADJ	REG	OT1	OT2	VAC
08/24/15	Mon 08:00aE	Work	+Mon 05:00pE	60min	1:00	9:00			
08/25/15	+*Vacation	Office							8:00
NOTE: Enjoy your vacation!									
<b>Totals: (Format: Minutes)</b>						9:00			8:00

9. Click **Submit**. You are directed to the Add Non-Work Hours Confirmation page.
10. Review the information on the Add Non-Work Hours Confirmation page for accuracy.
  - a. Click **Submit** to save your changes.
  - b. Click **Cancel** to cancel the transaction.
  - c. Click **Back** to go back to the Add Non-Work page and revise the data.

## Editing a Punch

Modifying or editing a punch on a 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 is 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. For instructions on enabling or disabling this option, refer to Section 2, Setting Your Time Clock Preferences.

## Using Batch Edits

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

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

1. Before editing punches, print the 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 the reports is uncomplicated.

All the blue links in the Timecard, Attendance, or Department 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: 08/24/15 Thru: 09/06/15 <a href="#">Add Punch</a> <a href="#">Add Non-Work</a>											<a href="#">Summary</a> · <a href="#">Page Break</a> · <a href="#">Daily</a> · <a href="#">Notes</a> · <a href="#">Exceptions</a> · <a href="#">Refresh</a>	
004-Burns, Jim												
DATE	TIME IN	DEPT	TIME OUT	LCH	ADJ	REG	OT1	OT2	VAC	SICK	HOL	TOTAL
08/24/15	Mon 05:10pE	Work	<a href="#">Add Punch</a>									
<b>Totals: (Format: Minutes)</b>												

- **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.

- **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 programs that use CSV files.

**Note:** It is best to use the Payroll Report when importing time clock data into Paychex Online Payroll. Refer to Using the Payroll Report in this section for additional information.

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, then select a location to save the file. You can open the CSV file in a text editor or Microsoft Excel.

**Summary:** Click **Summary** at the top of the Timecard report to display a summary of total hours on the Timecard report, without the punch detail.

**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.

## Using the Department Report

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

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

## Using the Timecards by Department Report

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

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

7891-C Haffey											
Busing Tables											
DATE	TIME IN	TIME OUT	LCH	ADJ	REG	OT1	OT2	VAC	SICK	HOL	TOTAL
08/13/14	Wed 08:02a	Wed 12:19p	30min		3:47						3:47
08/14/14	Thu 08:00a	Thu 04:00p	30min		7:30						7:30
08/15/14	*Sick								8:00		8:00
Totals: (Format: Minutes)					11:17				8:00		19:17
Reception											
DATE	TIME IN	TIME OUT	LCH	ADJ	REG	OT1	OT2	VAC	SICK	HOL	TOTAL
08/11/14	Mon 03:00p	Mon 09:00p	30min		5:30						5:30
08/12/14	Tue 02:21p	Tue 08:30p	30min		5:39						5:39
Totals: (Format: Minutes)					11:09						11:09
7891-C Haffey Total: (Format: Minutes)					22:26				8:00		30:26

## Creating Custom Reports

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

From the Navigation menu, hover your cursor over Reports, then 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. Under the **Select** drop-down menu, three options display:
  - **All Punches** is the default selection that displays all punches for the selected time frame.
  - **By Time Range** allows you filter the report to show only those punches that fall between the selected time-range. This option is most often used when running reports for tardy arrival or early departures.
  - **Only Non-work** allows you to select only Non-work or benefit time. In addition, you have the option to select which Non-work type, Holiday or Non-worked, to display on the report.
4. 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.
5. Select the applicable department(s) to view on the report from the **Select Departments** list, or click **Select All** to run a report for all departments.
 

**Note:** Press **Ctrl** key to select more than one department.
6. 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 allow you to print, email, or directly export to Payroll.

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 email addresses in the **Email 1** and **Email 2** fields.

**Note:** An SMTP server must be set up to send an email. Once done, you can send a message with the report by entering it into the **Message** field. For additional information on setting up your SMTP server, refer to Section 6, Additional Functionality.

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

**Note:** Contact your New Client Specialist to assist in setting up your Core Advanced Online Payroll account to accept the time clock export file.

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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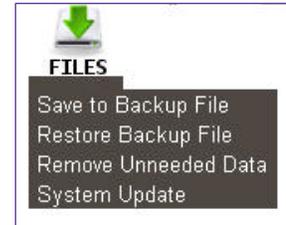
## Maintaining Your Time Clock

The Paychex PST 1000 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.



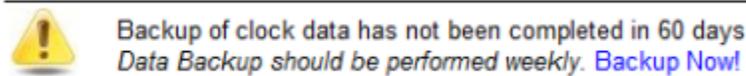
1. From the Navigation Menu, hover your cursor over **Files**, then select **Save to Backup File** from the drop-down menu.
2. Click **Submit** to create a backup in the Save to Backup File screen. A pop-up window displays.
3. Click **Save**.

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 want to save the file.
- c. Click **Save**.
- d. After the download is complete, click **Close**.

### Backup Alert Message

The following message displays on the PST 1000 Home page reminding you to backup your data.



The reminder remains on the Home page until a backup is created. Click **Backup Now!**, then refer to *Creating a Backup of Your Time Clock Data* to create a backup and remove the message.

## 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 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 time 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 time 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**, then navigate to the location of your backup file.
4. Select the file in the Choose File window, then 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 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 time 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, then press **ENTER**.

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

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

## Removing Data from Your Application

It is recommended you keep less than 40,000 punches on your time clock. To keep your system running optimal, remove unneeded data from the time clock.

**Important:** Before removing any data from your time clock, we recommend you first make a backup of your existing data.

1. From the Navigation menu, place your cursor over **FILES**, then click **Remove Unneeded Data**.
2. Select a date using the calendar in the **Delete Punches Prior to** field. All punches before the selected date will be permanently removed from your clock.
3. Click **Submit** to remove punches up to the date specified.
4. Click **Cancel** to go back to the time clock Home page.

**Note:** When selecting a date, any data before that date is no longer available as part of your active database.

## Updating Your Time Clock

Occasionally, Paychex PST 1000 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 Creating a Backup of your Time Clock Data in Section 5, Maintaining Your Time Clock, for additional information.

### Automatic Update Service

The PST 1000 time clock performs automatic software/firmware updates when a new update is available. The update service runs from 1:00 a.m. to 4:00 a.m. local time and checks for updates daily. During the update process, the time clock is unavailable.

If the PST 1000 time clock is unable to connect to the Paychex update service, the following message displays:



**Note:** The automatic update service is only available to clients using a network connection. If you are using the USB connection, refer to the Manual Update Process below.

## Manual Update Process

**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 PST 1000 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**, then 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 **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, then save it to the root of the flash drive.
2. 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.
3. 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 there is a time clock administrator change or an existing administrator forgot their login and/or password for the time clock application.

### Resetting the Software 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, then 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**. It is recommended you change the default code to a new six-digit code using the procedure that follows:

A screenshot of a web interface titled "DEVICE PREFERENCES". It contains a label "Supervisor Code" followed by a text input field containing "00 00 00". A red arrow points to the input field.

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.

A screenshot of a web interface titled "CHANGE PASSWORD". It features three text input fields labeled "Current Password", "New Password", and "Confirm New Password". Below the fields is a blue "Submit" button.

1. When prompted, enter the default login information and click **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, then press **Enter**.
3. The Set Date option displays.
  - a. The **Month** field flashes. Use **Up** or **Down** to select the current month, then press **Enter**.
  - b. In the **Day** field, use **Up** or **Down** to select the current day of the month, then press **Enter**.
  - c. In the **Year** field, use **Up** or **Down** to select the current year, then press **Enter**.
4. The Set Time option displays.
  - a. The **Hour** field flashes. Use **Up** or **Down** to select the current hour, then press **Enter**.
  - b. In the **Minute** field, use **Up** or **Down** to select the current minutes, then press **Enter**.
  - c. In the **AM/PM** field, use **Up** or **Down** to select either **A** for a.m. or **P** for p.m., then press **Enter**.
5. Once the new time and date is set, Date/Time and Set Successfully displays on the time clock display. You return to Supervisor Mode menu. Press **Clear** to exit Supervisor Mode.

## Looking Up the Time Clock IP Address

The IP address on your time clock assigned by your Internet router may change if it is **not** set to be static. To determine the current IP address, follow the instructions below:

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 pressing **Up** or **Down** until you find **View IP Address**, then press **Enter**. The current IP address of your time clock displays.
3. Press **Clear** twice to exit Supervisor Mode.

## Setting a Static IP Address

The IP address on your time clock assigned by your Internet router may change if it is **not** set to be static. To assign a static IP address, follow the instructions below:

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 **View IP Address**, then press **Enter**. The current IP address of your time clock displays.
3. Press **Enter** again.
4. Enter the desired IP address, including leading zeroes, then press **Enter**.

**Example:** 192.168.000.155
5. Enter the Subnet Mask, then press **Enter**.

**Example:** 255.255.255.000
6. Enter the Gateway address, then press **Enter**.

**Example:** 192.168.000.1
7. Enter the DNS address of your network, then press **Enter**.

**Example:** 192.168.000.1
8. Press **Clear** to exit Supervisor Mode.

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## 6 Additional Functionality

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## Additional Functionality

Your Paychex PST 1000 application is designed to meet the 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 PST 1000 provides additional functionality such as emailing alerts to supervisors, sorting of employees by department, adding supervisors with custom permissions, a web punch time clock option, emailing timecard reports to your payroll specialist, exporting to Paychex Online Payroll, and more.

### Setting Supervisor Permissions

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

1. Select **Lists | Supervisors**.
2. Click **Add Supervisors**.
3. Type the supervisor's Username, Supervisor's Full Name, and Password in the applicable fields.
4. Designate the access Permission Level and Permission Type using the radio buttons.

Permission Level		Permission Type		
Level 1	Level 2	Full Access	Read Only	No Access
Reports		<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Punches		<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Lists		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Employees		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Departments		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Clocks		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Supervisors		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Settings		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Preferences		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Alerts		<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Files		<input checked="" type="radio"/>	--	<input type="radio"/>
Backup		<input type="radio"/>	--	<input checked="" type="radio"/>
Restore		<input type="radio"/>	--	<input checked="" type="radio"/>
Update		<input checked="" type="radio"/>	--	<input type="radio"/>

- Click **No Access** to make the area off limits for the supervisor.
  - Click **Full Access** to give the supervisor permission to create, edit, and view transactions in that area.
  - Click **Read Only** to allow the user to only view the data in that area, but cannot make edits or changes.
5. Once complete, click **Submit** to save user settings.

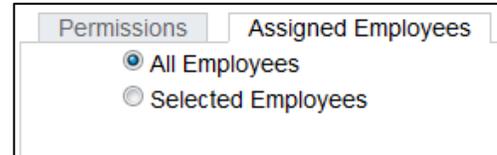
**Note:** Once you click **Submit**, you cannot change the username. To change the username, you must create a new supervisor account and delete the old one.

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

## Assigning Employees to a Supervisor

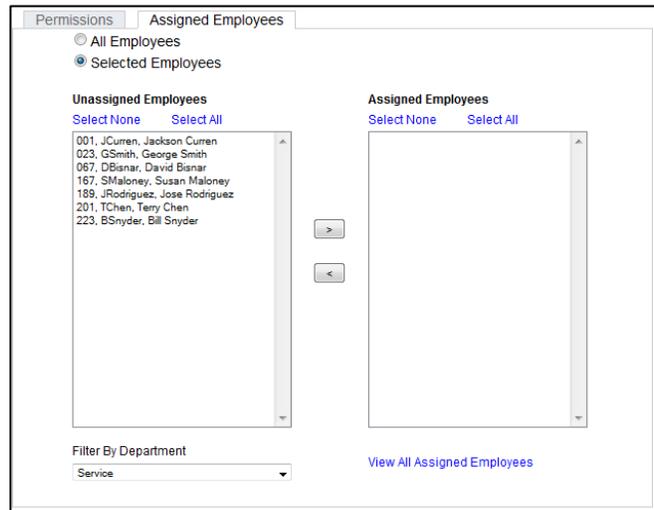
Supervisors can be given restricted access to view and edit data of only those employees assigned directly to them. They also receive Home page and email alerts of only their assigned employees.

1. Select **Lists | Supervisors**.
2. Select the appropriate supervisor from the list.
3. From the Edit a Supervisor page, select the **Assigned Employees** tab.



4. Select one of the available options:
  - Select **All Employees** to assign all employees to the supervisor.
  - Select **Selected Employees** to assign specific employees to the supervisor. Selecting this displays additional options allowing you to assign individual employees to the supervisor.
5. The **Unassigned Employees** column displays a list of available employees who are not currently assigned to the supervisor.

6. The **Assigned Employees** column displays a list of employees who are assigned to the supervisor.



7. Select employee(s) in the **Unassigned Employees** column, click **>** to move them to the **Assigned Employees** column, assigning them to the supervisor.

8. Select employee(s) in the **Assigned Employees** column, click **<** to move them to the **Unassigned Employees** column.

9. Click **Select All** to select all employees in the column.
10. Click **Select None** to deselect the employees in a column.
11. Use the **Filter By Department** drop-down menu to filter the **Unassigned Employees** column by department assignment.
12. Click **View All Assigned Employees** to generate a report of employees who are assigned to the supervisor.
13. Click **Submit** to save your settings.

## Supervisor Login

To log in 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. 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**.

**EDIT A DEPARTMENT**

Department Name

Active

Note

Department Code

Who is there?

In Revision Start Time  ▲▼

In Revision End Time  ▲▼

Out Revision Start Time  ▲▼

Out Revision End Time  ▲▼

## 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 you want to assign to the employee from the drop-down menu.

EMPLOYEE SETTINGS		
Departments	DEPT	ORDER
	Shipping <input type="text"/>	1
	Add Department <input type="text"/>	2

4. If you are assigning more than one department, enter the order the departments display at the time 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 procedure), 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 cannot 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. Enter a time in **hh:mm:a/p** format in the **In Revision Start Time** field. For example, 07:30a.
3. Enter a time in **hh:mm:a/p** format in the **In Revision End Time** field. For example, 08:00a.

**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. Enter a time in **hh:mm:a/p** format in the **Out Revision Start Time** field. For example, 04:30p.
5. Enter a time in **hh:mm:a/p** format in the **Out Revision End Time** field. For example, 05:00p.

**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.

## SMTP Server (Email Server)

The Paychex PST 1000 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 email alerts or Timecard Reports, 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 email server services available. Settings for the most common free web based SMTP server accounts can be found on page 9 and 10 in this section.

**What is an SMTP Server?** An SMTP server works like a post assistant, handling the sending of emails from an email client to an email server. It receives outgoing email messages from users and routes them to the email recipients they are intended for.

## SMTP Server Settings

1. To assign your SMTP server settings, go to Device Preferences by clicking **Settings | Device**.
2. Type your complete SMTP email 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 email server port by entering a colon and then the port number after the server address.

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

3. Check the **Use SSL for SMTP** checkbox to use data encryption when sending emails. Using SSL may be a requirement for some SMTP server providers and may require you to define the SMTP port.
4. Check the **Use STARTTLS** checkbox if you are using SSL and your SMTP service provider requires that you first connect to the server using an unsecure connection before connecting using SSL.
5. Check the **Use Authentication** checkbox if your SMTP server requires a username and password to send emails.
6. Enter the **Auth Username** if you checked **Use Authentication**; enter your SMTP server username.
7. Enter the **Auth Password** if you checked **Use Authentication**; enter your SMTP server password.
8. Type the email address you want to display in the **FROM** field in your email in the **Alert From Address** field. The default setting is Your\_Time\_Clock.
9. Type your email domain name in the **Email Domain Name** field. You can leave this set at the default setting, timeclockalerts.com.
10. 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.

SMTP PREFERENCES	
Server Address	smtp.paychex.com
Use SSL for SMTP	<input type="checkbox"/>
Use STARTTLS	<input type="checkbox"/>
Use Authentication	<input type="checkbox"/>
Auth. Username	
Auth. Password	
Alert From Address	
Email Domain Name	paychex.com

### Hotmail/MSN

**Server Address:** smtp.live.com:587

**Use SSL:** checked

**Use STARTTLS:** checked

**Use Authentication:** checked

**Auth. Username:** Hotmail account user account name

**Auth. Password:** Hotmail account password

**Alert From Address:** Hotmail email address

**Email Domain Name:** Optional Customization (business or your name)

### Gmail

**Server Address:** smtp.gmail.com:587

**Use SSL:** checked

**Use STARTTLS:** checked

**Use Authentication:** checked

**Auth. Username:** Gmail account user account name

**Auth. Password:** Gmail account password

**Alert From Address:** Optional Customization (business or your name)

**Email Domain Name:** Optional Customization (business or your name)

**Note:** For Google inbox with two step authentication, follow the process at <https://www.google.com/landing/2step/>.

### Comcast

**Server Address:** smtp.comcast.net:465

**Use SSL:** checked

**Use STARTTLS:** un-checked

**Use Authentication:** checked

**Auth. Username:** Comcast account user account name

**Auth. Password:** Comcast account password

**Alert From Address:** Comcast email address

**Email Domain Name:** Optional Customization (business or your name)

### Verizon

**Server Address:** outgoing.verizon.net:587

**Use SSL:** checked

**Use STARTTLS:** un-checked

**Use Authentication:** checked

**Auth. Username:** Verizon account user account name

**Auth. Password:** Verizon account password

**Alert From Address:** Verizon email address

**Email Domain Name:** Optional Customization (business or your name)

### Apple MobileMe

**Server Address:** smtp.mac.com:587  
**Use SSL:** user preference  
**Use STARTTLS:** Checked if the above setting is selected  
**Use Authentication:** checked  
**Auth. Username:** MobileMe username  
**Auth. Password:** MobileMe account password  
**Alert From Address:** MobileMe account email address  
**Email Domain Name:** Optional Customization (business or your name)

### AT&T

**Server Address:** smtp.att.yahoo.com:465  
**Use SSL:** checked  
**Use STARTTLS:** un-checked  
**Use Authentication:** checked  
**Auth. Username:** AT&T username  
**Auth. Password:** AT&T account password  
**Alert From Address:** AT&T account email address  
**Email Domain Name:** Optional Customization (business or your name)

### AOL

**Server Address:** smtp.aol.com:587  
**Use SSL:** un-checked  
**Use STARTTLS:** un-checked  
**Use Authentication:** checked  
**Auth. Username:** AOL username  
**Auth. Password:** AOL account password  
**Alert From Address:** AOL account email address  
**Email Domain Name:** Optional Customization (business or your name)

### Yahoo

**Server Address:** smtp.mail.yahoo.com:465  
**Use SSL:** checked  
**Use STARTTLS:** un-checked  
**Use Authentication:** checked  
**Auth. Username:** entire Yahoo! email address  
**Auth. Password:** Yahoo! account password  
**Alert From Address:** entire Yahoo! email address  
**Email Domain Name:** Optional Customization (business or your name)

## Enabling SSL Server – Data Encryption

SSL data encryption ensures 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.

**Note:** Do **not** use SSL data encryption with the USB connection. Enabling SSL data encryption while using USB disables access to the time clock.

## 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 (network) LAN, WAN, Internet, or on a stationary computer. The Web Punch Time Clock also offers advanced functionality. For example, IP location restrictions to help manage your employees' punches.

WEB PUNCH

Current Time: Mon 7:49 PM  
Hello Carol Gravante, you last punched out on 08/24/15 05:00p.

What do you want to do?  
Punch In

Log Out

**Note:** If you are using USB communications, Web Punch is not 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:

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 this employee can punch from in the **Authorized IP Address(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 want to assign to 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

## 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

Password

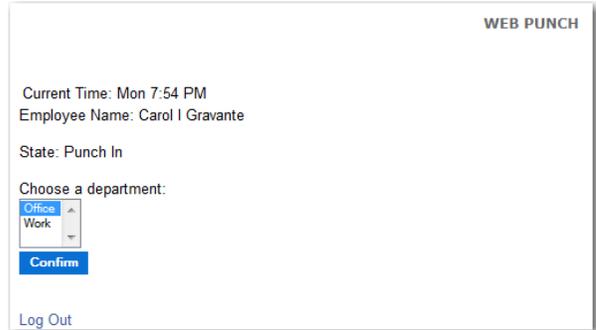
Mon 7:51 PM

Submit

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.



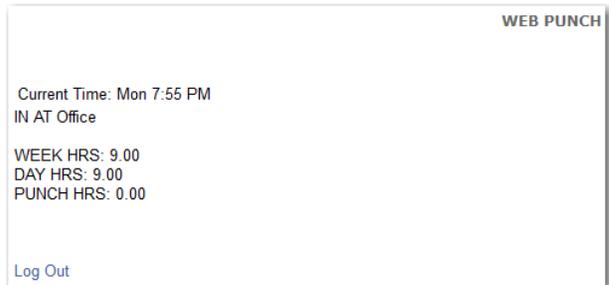
5. Select the appropriate option (**Punch In**, **Punch Out**, or **Department Change**) to complete your punch.

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

2-Gravante, Carol												
DATE	TIME IN	DEPT	TIME OUT	LCH	ADJ	REG	OT1	OT2	VAC	SICK	HOL	TOTAL
08/24/15	Mon 08:00aE	Work	+Mon 05:00pE	60min	1:00	9:00						9:00
08/25/15	+*Vacation	Office								8:00		8:00
<b>Totals: (Format: Minutes)</b>						9:00			8:00			17:00

To make it easy 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.

---

**EDIT A PUNCH**

Employee 2-Gravante, Carol

Flags E

Type

Date

Time

Lunch  Minutes

Adjust  Hours

Tips

Note

**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 can 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, deselect 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 in which a specific employee is authorized to punch in/out. To set the authorized IP address(es), perform the following instructions.

1. Go to the **Employee** page, then 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) in which 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 instructions below.

1. Select **Navigation | Settings**, then click the **Device** tab.
2. Under **Device Preferences**, check the **Lock Keypad** checkbox. By checking this checkbox, employees are no longer able to punch in or out using their PIN number.

## Multiple Time Clock Connection

PST 1000 offers a unique way to connect up to 16 time clocks together, accessed through one software interface, through your local area network or over the Internet.

Follow the instructions in this section to connect your clocks together using multiple time clock connection.

For instructions on setting up multiple time clocks together sharing data over the Internet, refer to Section 7, Troubleshooting and Frequently Asked Questions.

**Note:** Connecting multiple time clocks requires that your time clock terminals are connected to a Network port via Ethernet.

There are two types of clocks in a multiple clock system:

**Parent Clock:** The Parent Clock hosts the time clock software, settings, and punch data. There is only one Parent Clock in a system with multiple time clocks connected together.

**Child Clock:** A Child Clock sends punch information to the Parent Clock for calculation and storage. There can be a maximum of 15 Child Clocks on a system.

## Connecting Multiple Time Clocks

### Set Up the Parent Clock

1. Before setup begins, designate which clock is the Parent Clock hosting the time clock software, settings, and punch data.
2. Follow the instructions in the *Paychex PST 1000 Quick Start Guide* to connect your time clock to your Network. The *Paychex PST 1000 Quick Start Guide* can be found in the time clock package.
3. Write down the serial number of the Parent Clock located on a label on the back of the time clock terminal.

**Note:** It is recommended that the Parent Clock is located in a location nearest to the person managing the time clock and the Parent Clock be assigned a static IP address. For instructions on assigning a static IP address, refer to Section 7, Troubleshooting and Frequently Asked Questions.

---

## Set Up the Child Clock(s)

1. With the Child Clock connected to the Network, enter Supervisor Mode.
    - a. Press  on the time clock.
    - b. Enter your security code. The default security code is **00 00 00**.
  2. Press **Up** or **Down** until the **CONVERT TO CHILD** option displays.
  3. Press **ENTER**. The time clock displays, "This will remove all data", then "Erase all Memory".
  4. When prompted, press **IN** to remove all data from the Child Clock. The Child Clock then needs to locate to the Parent Clock. The Child Clock locates the Parent Clock through one of two method, broadcast or IP address.
  5. Select **By Broadcast** to locate the Parent Clock on a standard Network connection (LAN) by pressing **Enter**. The Child Clock displays "Finding Clocks Please Wait" as it scans the network for the Parent Clock.
    - a. Once the Child Clock locates the Parent Clock, the clock displays "Choose One" and the serial number of the Parent Clock displays. Select the serial number of the clock you previously designated as the Parent Clock, then press **Enter**.
    - b. If there is more than one Parent Clock on the Network, use the **Up** or **Down** key to find the correct Parent Clock serial number, then press **Enter**. Proceed to step 7.
  6. Select **By IP address** to locate the Parent Clock over a Wide Area Network, VPN, or the Internet. Press the **Down** key to select **By IP address**, then press **Enter**.
    - a. Enter the IP address of the Parent Clock used for accessing the software interface, then press **Enter**. Proceed to step 7.
- Note:** If connecting over the Internet, enter the public IP address used to access the Parent Clock. For additional information on assigning a public IP address, with port-forwarding, refer to the Configure Your Time Clock Software for Remote Internet Access in this section.
7. Once the Parent Clock is located, the clock converts to a Child Clock. When finished, the Child Clock displays **Child Mode**, then **Enter ID Number**. The symbol ' - ' displays in the top right corner. This ' - ' indicates the Child Clock is establishing a connection to the Parent Clock.
  8. Once the connection is established, the symbol **d** displays in the top right corner of the display. The **d** indicates the Child Clock is connected to the Parent Clock, but the Child Clock is disabled.
  9. To enable the Child Clock, log into the Parent Clock using a web browser.
  10. Hover over the **Lists | Child Clocks**, then select the serial number of the Child Clock.
  11. In the Edit a Clock screen, enter a name for the Child Clock.

12. Check the **Enabled** checkbox to enable the Child Clock to send data to the Parent Clock, then click **Submit**. The Child Clock displays “#” in the top-right corner of the terminal display indicating the Child Clock is communicating with the Parent Clock. After a few minutes this changes to “+” indicating the Child Clock is active and ready to use.
13. To set up additional Child Clocks, repeat the steps in this section for each clock.

### Additional Child Clock Settings Available in Supervisor Mode

The following additional options display in Supervisor Mode on the clock:

- **Show Parent IP** - Displays the IP address of the Parent Clock.
- **Force Connect** - Forces a connection between the Child Clock and Parent Clock. Once the connection is made, any changes on the Parent Clock are sent to the Child Clock.
- **Force Full Sync** - Forces a connection and synchronization between the Child Clock and Parent Clock. Once the connection is made, all changes on the Parent Clock are sent to the Child Clock.
- **Show Sync Status** - Displays the synchronization status between the Child and Parent Clock.

### Multi-Clock Software Settings and Optimal Configuration

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

To access these settings, log into your time clock software interface using the Parent Clock's IP address.

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

MULTI-CLOCK PREFERENCES			
Child realtime Time/Date sync	<input checked="" type="checkbox"/>		
Child realtime data sync	<input checked="" type="checkbox"/>		
Child Online sync delay	<input type="text" value="300"/>	Seconds	
Child Offline sync delay	<input type="text" value="60"/>	Seconds	

- **Child realtime Time/Date sync** - Check this checkbox to have the Child Clock automatically synchronize its time and date with the Parent Clock. If your Child Clock(s) is located in a different time zone than the Parent Clock, do **not** check this option.
- **Child realtime data sync** - Check this checkbox to set the Child Clock(s) to synchronize data with the Parent Clock in realtime. With this option enabled, the employee is able to view punch and hours information upon clock out.

If punching in or out takes longer than preferred, disable this option by unchecking the checkbox. The Child Clock synchronizes data at set intervals, as described below.

**Note:** By disabling this option, the employee is not prompted by the clock to select the correct punch option (IN or OUT) at the clock (punch validation is disabled). The employee must select the correct punch option. In addition, the employee no longer automatically sees the punch and hours information after punching out.

- **Child Online sync delay** - This option allows you to set a time interval (in seconds) to sync the Child Clock's data with the Parent Clock data when the Child realtime data sync option is disabled. This option is set to a 300 second (5 minutes) interval as default.
- **Child Offline sync delay** - This option allows you to set a time interval (in seconds) for attempting to sync the Child Clock with the Parent Clock in the event the Child Clock or the Parent Clock loses connection with the network. This option is set to a 60 second interval as default.

## Configure Your Time Clock Software for Remote Internet Access

After configuring your network to allow your time clock to be accessed remotely over the Internet, you are able to log into the time clock software from home, on the road, or from a remote location. If you are using the Web Punch Time Clock option, employees can also clock IN/OUT remotely when away from the office, with this feature.

### What you need:

- A broadband Internet connection (Cable, DSL, T1, etc.) at the location of the clock.
- The time clock must be connected to your router by an Ethernet (for example, CAT5) cable.
- A "Port-Forwarding" router.
- Static public/external IP address, although not required, is highly recommended. Contact your Internet Service Provider for a static public/external IP address.

**Important:** Paychex is not responsible for configuring your router and is only able to provide general setup steps. There are many different types, brands, and models of routers and networks. We recommend that you contact an IT consultant if you require additional troubleshooting help.

Follow these instructions below to connect your time clock over the Internet:

Set up the time clock you want to connect to over your local internal network. Refer to the *Paychex PST 1000 Quick Start Guide* for additional information.

1. Assign a static IP address to the time clock with the subnet mask, gateway address, and DNS address.
  - A. Determine an available IP address to assign to the time clock. This can be provided by your Network Administrator.
  - B. Enter into Supervisor Mode at your employee time clock terminal.
    - a. Press  on the time clock.
    - b. Enter your security code. The default security code is **00 00 00**.
  - C. Scroll through the options pressing **^** or **v** until you find the option **View IP Address**, then press **Enter**.
  - D. The current IP address of the clock displays. Press **Enter** again.
  - E. Enter the desired IP address, including leading zeros, then press **Enter**.

**Example:** 192.168.000.155
  - F. Enter the Subnet Mask, then press **Enter**.

**Example:** 255.255.255.000
  - G. Enter the Gateway address, then press **Enter**.

**Example:** 192.168.000.1
  - H. Enter the DNS address of your network, then press **Enter**.

**Example:** 192.168.000.1
  - I. Press **Clear** to exit out of Supervisor Mode.

2. Configure your router for port-forwarding:

To connect to your time clock software remotely, you must configure your router for port-forwarding. Port forwarding allows remote computers, for example, computers on the Internet, to connect to a specific computer or service within a private Local Area Network (LAN).

**Important:** The instructions in this section are general guidelines for configuring a router for port-forwarding. Actual required steps may vary with each router. For instructions on configuring your specific router, go to the website [www.portforward.com](http://www.portforward.com) and select your router brand and model, or contact your router's manufacturer.

If you are using both a router and a cable modem router/DSL modem router, port forwarding must be configured on both the router and cable modem router/DSL modem router. Alternatively you can contact your ISP to disable the router function on your cable modem router/DSL modem router.

- a. Go to your router's administrative web site by opening your web browser, then enter the standard IP address for your router.

**Example:** 192.168.1.1 or 192.168.0.1

The router asks for a username and password. Below are some default router logins.

- Linksys Router - "admin" for both username and password
  - Netgear Router - "admin" for username and "password" for password
  - D-Link Router – "admin" for username and (leave blank) for the password
  - 3Com Router – "admin" for both username and password
  - Microsoft Broadband – "admin" for both user and password
- b. Find a tab with a name, for example, "Port Forwarding" or "Applications and Gaming" and assign the port that you will forward.
    - For off-site software interface access, enter **port 80** as the desired port. If port 80 is unavailable, enter **port 9844** as an alternative.
    - For connecting multiple time clocks over the Internet, enter **port 10923**.
    - Enter the internal IP address used to access PST 1000.
  - c. If your router asks you to open ports for TCP or UDP, select **TCP** or **both**, then click **Save Setting**.

4. Connect to your time clock over the Internet:

- A. Determine the public IP address at the location of the clock in one of two ways:

- a. On a computer on the same local network as the time clock, go to [www.ipchicken.com](http://www.ipchicken.com).
- b. Look in your router's property settings for the Wide Area Network (WAN) address.

- B. From the remote location, type the external/public IP address into a browser's address bar.

If you are forwarding to port 9844, log onto the time clock using your external/public IP address followed by ":9844" and preceded by <http://>.

**Example:** <http://68.213.105.154:9844>

68.213.105.154 is the external IP address.

9844 is the port number.

## Port Forwarding Troubleshooting Tips and FAQs

**Note:** Internet Service Provider will not provide a static external/public IP address.

If you are unable to get a static external/public IP address from your ISP, you have two options:

- Use the dynamic external/public IP address, if/when the IP address changes, go to [www.ipchicken.com](http://www.ipchicken.com) to look up the new external/public IP address.
- Use a third party dynamic DNS service provider.

There are a number of providers who provide a dynamic DNS service. These are generally implemented in the user's router or computer, which notices changes to its IP address and automatically sends an update message to the Dynamic DNS (DDNS) service provider.

List of DDNS service providers:

- [dyn.com](http://dyn.com)
- [no-ip.com](http://no-ip.com)
- [dnsdynamic.org](http://dnsdynamic.org)
- [changeIP.com](http://changeIP.com)

### Troubleshoot Connection Problems

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

1. Restart your router.
2. If you are using both a router and a cable modem router/DSL modem router for port forwarding, ensure port forwarding is configured on both the router and cable modem router/DSL modem router. Alternatively, you can contact your ISP to disable the router function on your cable modem router/DSL modem router.
3. Ensure that a static internal IP address is assigned to the clock with the proper subnet mask, DNS address, and gateway address.
4. Ensure the correct time clock IP address and/or port number is input in the port forwarding settings in your router.
5. Ensure the correct external/public IP address is input at the web browser.
6. Ensure there is not another device on the network using a duplicate IP address as the time clock.
7. Check the filter settings on the router to ensure it is not interfering with the connection.
8. Use an open port checker, like [www.yougetsignal.com](http://www.yougetsignal.com), to check your external IP address and detect open ports on your connection.

For additional troubleshooting steps, refer to <http://www.portforward.com>. Select your router by model name and number for specific port forwarding instructions.

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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, Setting Your Time Clock Preferences.

**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 keeping five pay periods worth of punch data on your time clock. To keep your system running optimal, delete unneeded data off the time clock. Refer to Removing Data from Your Time Clock in Section 5, Maintaining Your Time Clock, 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, Setting Your Time Clock Preferences.
- 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 punch count of my employee time clock?**

You can find the current number of punches (punch count) stored on your time clock in one of two ways:

- Select **Help | About Your Clock**.
- Select **Help | Remove Unneeded Data**

### 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**.

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

If the time clock was assigned a dynamic IP address, this address may have changed if the router reboots or your time clock is unplugged. A static IP address does not change 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  on the time clock.
  - b. Enter your security code. The default security code is **00 00 00**.
3. Scroll through the options using the **Up** or **Down** arrows until you find View IP Address, then press **Enter**. The current IP Address of the time 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 time clock, IP address set successfully. Press **Clear** to exit Supervisor Mode.

**Note:** If the time 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. Open a web browser on your computer. In the address bar, type the IP address of the time clock to log into the time clock.

### The total hours shown on a report do not add up to the same amount when I manually calculate the hours. Why?

If the Calculated Time Format setting is set as **hundredths**, the total hours shown on a report may vary slightly from the total when manually calculated. The time calculated by the time clock is actually the more accurate calculation. This is because the time clock calculates all total hours in minutes, then converts the minutes to hundredths.

#### Example

DATE	TIME IN	DEPT	TIME OUT	LCH	ADJ	REG
04/09/13	Tue 08:00a	Hygenist	Tue 04:02p			8.03
04/10/13	Wed 08:00a	Hygenist	Wed 04:02p			8.03
<b>Totals: (Format: Hundredths)</b>						<b>16.07</b>