



Virtual TimeClock[®] Network Edition Setup Guide

This guide will orient you with Virtual TimeClock and walk you through the essential setup required for a new user of Virtual TimeClock Network Edition. For installation follow the steps on our [installation guide](#) beginning with installing the Virtual TimeClock Server Manager. If you are moving your TimeClock or upgrading your software, review the [moving guide](#) or the [upgrading guide](#).

A Pro Client is required for the setup of the time clock because it has administrative access, whereas a User Client only allows users to clock in. Note: the Server Manager does not interface with the TimeClock. If you have not yet purchased Virtual TimeClock, the software will run for a limited time as a fully-functional [Free Trial](#).

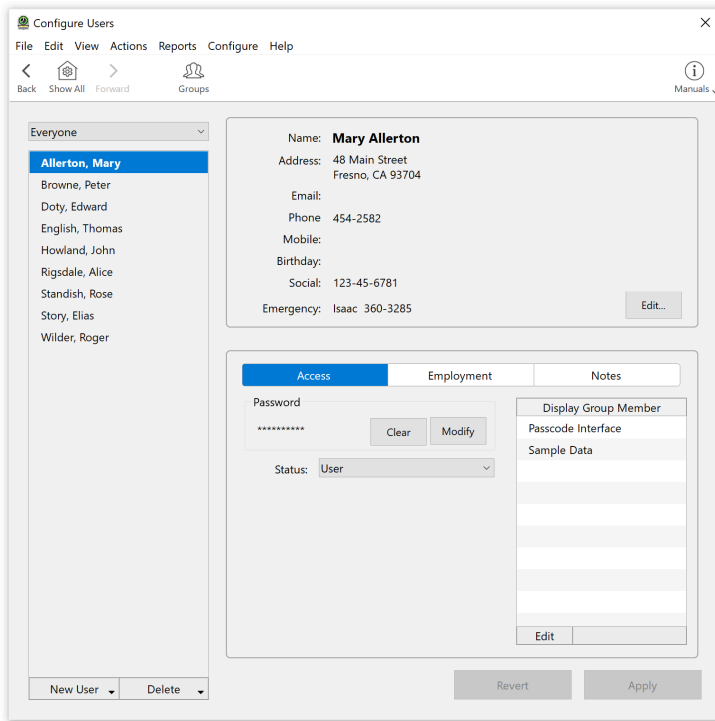
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A. Add Users

1. Once you've connected a Pro Client to your TimeClock Server, you will need to add users to the time clock. Users can be added manually or imported from a .CSV or [QuickBooks](#) .IIF file. If you choose to add users manually, follow the steps below.
2. Select **Add Users** and a window will open. After entering each user click **Save & Next** to continue adding users. When done click **Save & Close**.
3. After adding users you will be brought to the *Configure Users* window. To edit a user's information, select the user name in the left column and use the Access, Employment and Notes tabs. For information, review the [Overview of Users, Managers & Administrators article](#).
 - In the **Access** tab you can set passwords and change a user's status.
 - The **Employment** tab contains information such as hire dates, wages, and more.
 - The **Notes** tab allows you to input and record any other user information.

- To add more users click **Add** in the bottom left corner of the Configure Users window. To return to this window in the future, click **Users** from the *Configure* menu.



Use the popupmenu at the top of the User list to filter which users are displayed.

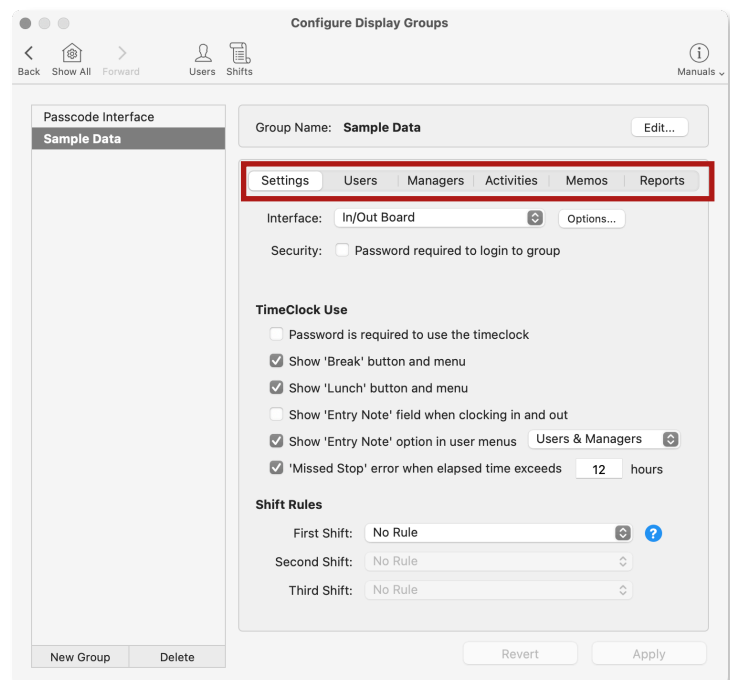


Caution: Deleting a user permanently removes the user and all their timecard information from the program. Instead of deleting, consider [making a user inactive](#).

B. Display Groups

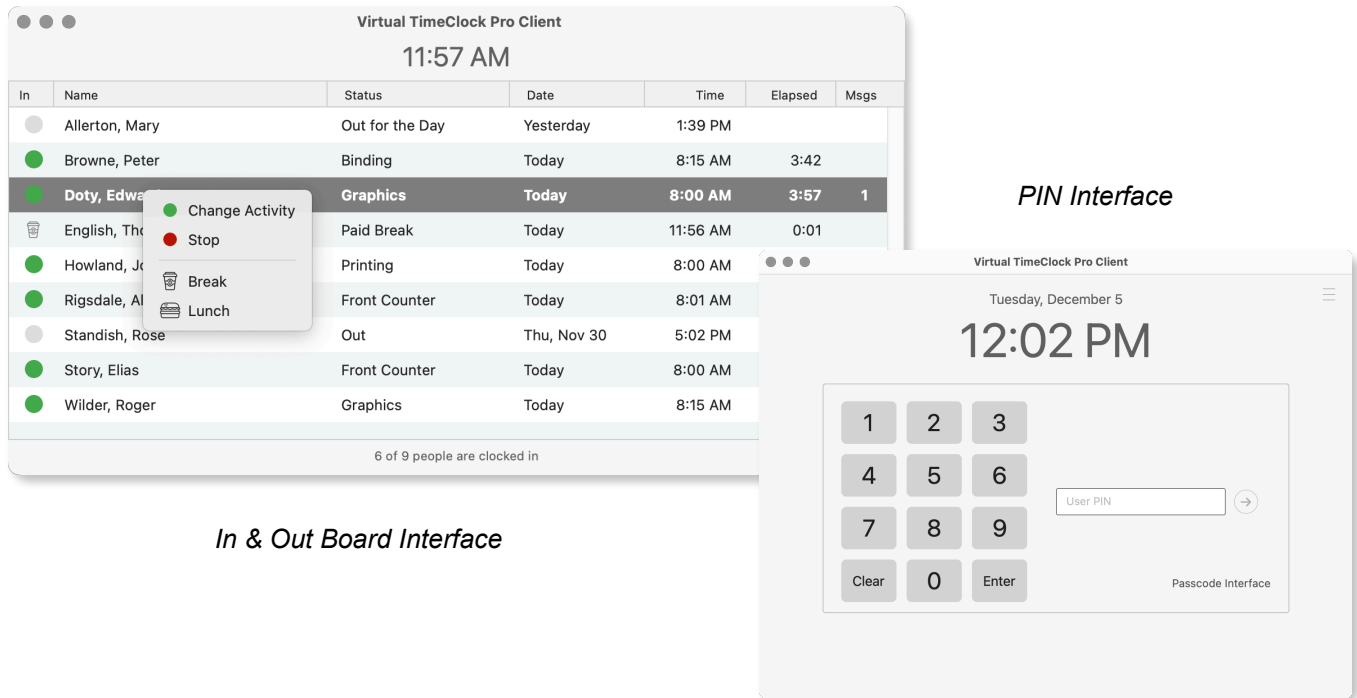
To continue with the setup of your time clock click the **Groups** icon in the toolbar of the Configure Users window to edit Display Group settings. [Display Groups](#) are how rules are assigned to specific groups of

- With the **Settings** tab selected, choose the group interface users will clock in on.
 - For detailed information, [review this article](#).
- Decide if users will use a password.
 - If using the In/Out Board, users will be prompted to create a password the first time they clock in. Otherwise passwords need to be assigned to users in the Configure Users window.
- Review the default settings by going through each of the tabs in this window and orient yourself to the settings of Virtual TimeClock. We recommend that after you familiarize yourself with the program to revisit these settings.



users. Display groups can be used to track and display users of different locations to simplify the clocking in process for users and for those managing the TimeClock.

Below are examples of the interfaces options available in Virtual TimeClock.



C. Important Notes for Display Groups

- To save time and for anonymity, many companies use the [PIN or Passcode](#) interface for employees to quickly login without seeing other users. The In/Out Board can be customized for privacy by unchecking **Time** and **Elapsed** within the In & Out Board Options section, so users do not see the time other users clocked in.
- Group passwords are optional and are for users to enter if the TimeClock becomes disconnected from the Virtual TimeClock Server Manager. Entering the password in the Login to Server window will open the TimeClock to User mode and interface assigned to the display group. This password is not used to clock someone in or out, only to reconnect the TimeClock.

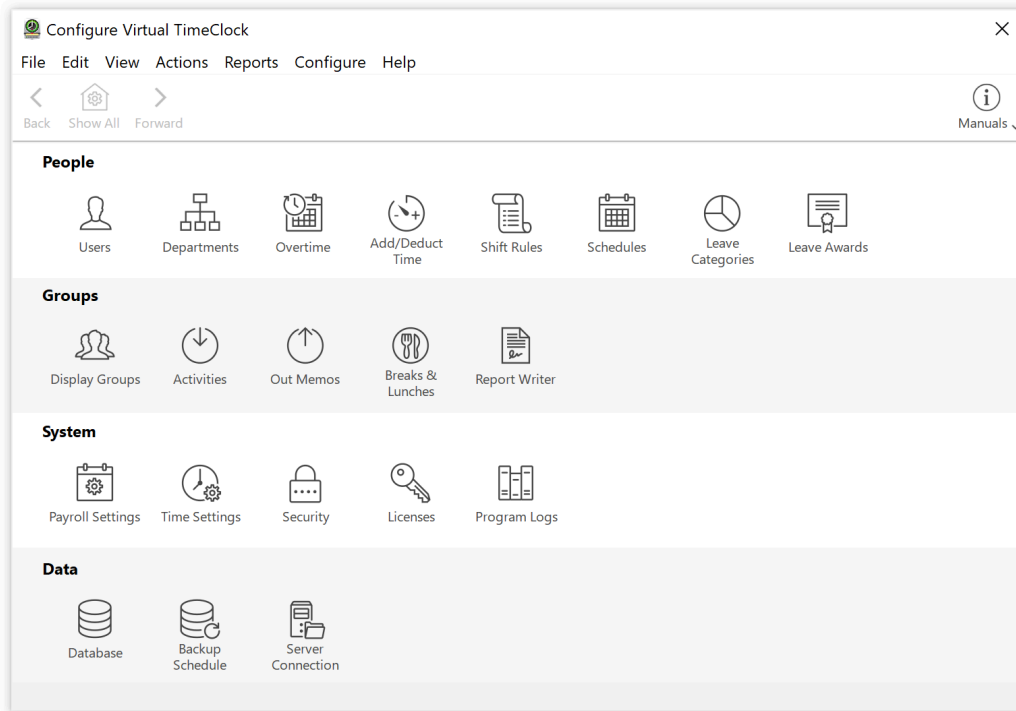
D. Assigning Managers & Administrators

Managers and Administrators in Virtual TimeClock are Users who are assigned permissions that allow them to access features like viewing reports and editing entries. A Manager can have limited access to settings and features, but an Administrator has full access to everything.

Managers must be assigned to a Display Group to access user reports and edit entries. Users and managers can be assigned to multiple groups if necessary, but Administrators have access to everything by default. Assign a user to be a manager of a group by going to the **Managers** tab of the Display Groups window. In the Group Managers section click **Select** and choose which users to give manager access to. To come back to this window later, go to **Configure > Display Groups** and select the **Managers** Tab.

Managers and Administrators can turn administration mode on from the **File** menu using their name and password. However, unlike an Administrator, Managers will only see the Display Group, reports and features that the Administrator granted them permission to see.

To continue setup click **Show All** in the Toolbar. While in administration mode you can revisit this window by clicking the Configure gear icon in the toolbar on the In & Out Board. The different configuration categories are organized in the sections **People, Groups, System, and Data**.

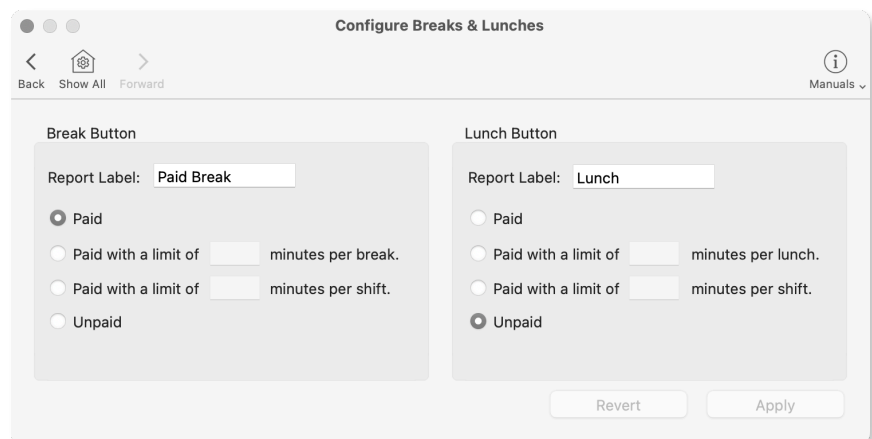


E. Breaks & Lunches

With the Configure window open, within the **Groups** Section select the **Breaks & Lunches** icon. You can track paid and unpaid breaks and lunches.

1. From the Configure Breaks & Lunches window select if breaks & lunches are paid, unpaid or paid with a limit of time.
2. Break and Lunch buttons are visible to users by default. The buttons can be removed by going to **Configure > Display Groups** and uncheck the boxes under the Breaks & Lunches section.

- Restrict early or late return from lunch by setting shift rules in the **Shifts** settings.
- Go to **Configure**, then **Auto Add/Deduct Time** if you want to track lunch, but not have employees clock out for lunch.



F. Activities

The time clock can track time spent on different tasks, jobs, or projects, to setup click the **Configure** program menu and choose **Activities**, which is found in the **Groups** section. When users clock in they will select an activity. If you want to track time by projects or activities throughout the day instruct your employees to choose the correct activity when they clock in. Users can change activities as often as needed during a shift to track their time for tasks and billable projects. To learn more about activities, review the [Overview of Activity Tracking Knowledge Base article](#) on our website.

1. Click the **Add** button to create a new activity.
2. If you want users to be able to select the activity when clocking in then set the status to **TimeClock and Manual Entries**.
3. Determine if activities are paid, unpaid or paid with a limit of time.
4. To assign activities to specific groups of users, click **Edit Group Activities**.



You can view [reports based on activities](#) by clicking the Reports program menu and choose Activity Detail to get started.

G. Overtime Settings

To configure and assign overtime rules to users, select **Overtime** within the **People** section of the Configure window. To learn more creating an overtime rule and how hours are calculating, review the [Overview of Overtime Knowledge Base article](#) on our website.

1. There are three built in Overtime Rules you can choose from or add your own. Click to select the overtime rule you wish to edit or click **Add** to create a new one.
2. Edit the rule by clicking **Modify Rule** to set thresholds and rates.
3. Assign the overtime rule to users by clicking **Edit**. If users are not assigned, the overtime rule will not be applied to them.

Important Note: Users can only be assigned to one overtime rule. Confirm you are assigning users to the correct rule.

H. Payroll Settings

Payroll Settings allows you to adjust the Payroll Frequency, Period, Timecard Approval, and Payroll Export. To configure, select **Payroll Settings** within the **System** section of the Configure window.

1. Set payroll frequency from the drop down menu.
2. Enter current payroll period start date. The system will autofill the end date by the payroll frequency selected, unless it is User Defined.
3. If you plan on using payroll integration, ensure the TimeClock is compatible with your payroll company. Click [here](#) to find out if Virtual TimeClock imports into your program and follow the one-time setup guide for your payroll provider.
4. After setting up payroll integration with your provider, return to the Payroll Settings window. Select the company from the list and click **Setup** to complete the set up process.

I. Time Settings

To configure how hours are rounded and displayed on timecards select **Time Settings** within the **System** section of the Configure window.

1. Choose your timestamp source. If tampering with the computer's clock is a concern, choose an Internet Time Server as the [timestamp source](#). If you have time clocks across time zones, select Internet Time Server to record local time of time clock entries.
2. Set your workweek start day. This does not affect your payroll period. It will effect how your weekly totals are displayed on reports.
3. Select the time rounding setting. This is based on how time totals will be displayed. This will not change the recorded start and stop times, only how the hours are calculated. [Find out more](#).



With quarter hour rounding, 8:07 would round down to 8:00 and 8:08 would round up to 8:15.

J. Security Rules

We recommend password protecting administrative features of the TimeClock. You can also set user password rules by clicking **Security** in the **System** section of the Configure window.

1. Requiring a password to turn on Administration is enabled by default. If you do not want to require a password, click to uncheck the box labeled and click **Apply**.
2. Set and review [password rules for users](#) based on your organization's needs.
 - To discourage buddy punching, we recommend setting the password to the user's Social Security Number. We find users are less likely to share their SSN with others.

K. Licensing

After a Virtual TimeClock license is purchased, an email containing the license key and instructions will be sent. The software will continue to run in eval mode until a valid license key is entered.

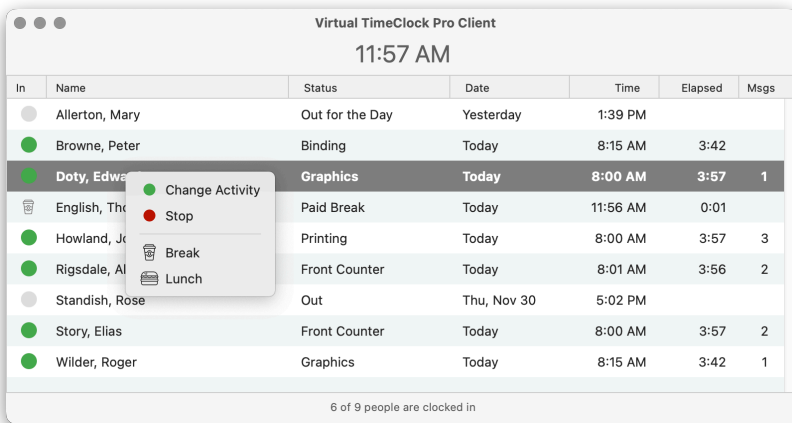
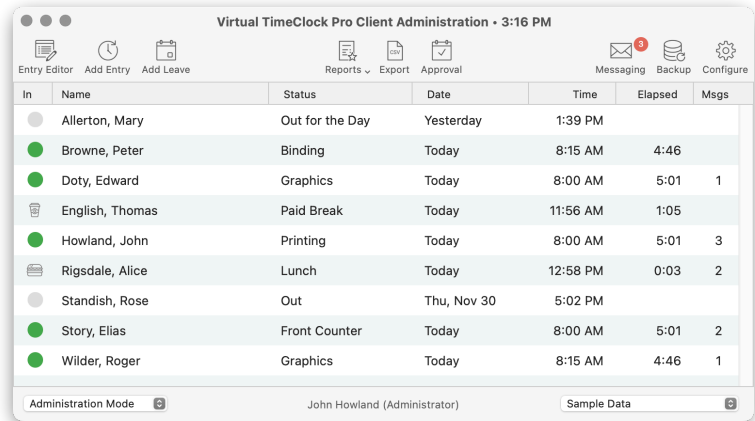
L. Administration and User Mode

There are two modes of the time clock. One is **Administration Mode**, which you must be in to make changes to settings and where Managers and Administrators can edit entries and access reports.

To turn **Administration Mode** on and off, go to **File** then **Turn Administration On/Off**. You will be prompted to enter your administrator or manager password.

If you're logged into **Administration Mode**, the toolbar of icons and functions are visible as well as the Configure settings. Popular TimeClock functions can be accessed directly from the program menu bar.

To change the users displayed on the In & Out Board change the Display Group by choosing a different group from the drop down menu in the bottom right-hand corner.



This is **User Mode** when the In/Out Board interface is chosen for this Display Group.



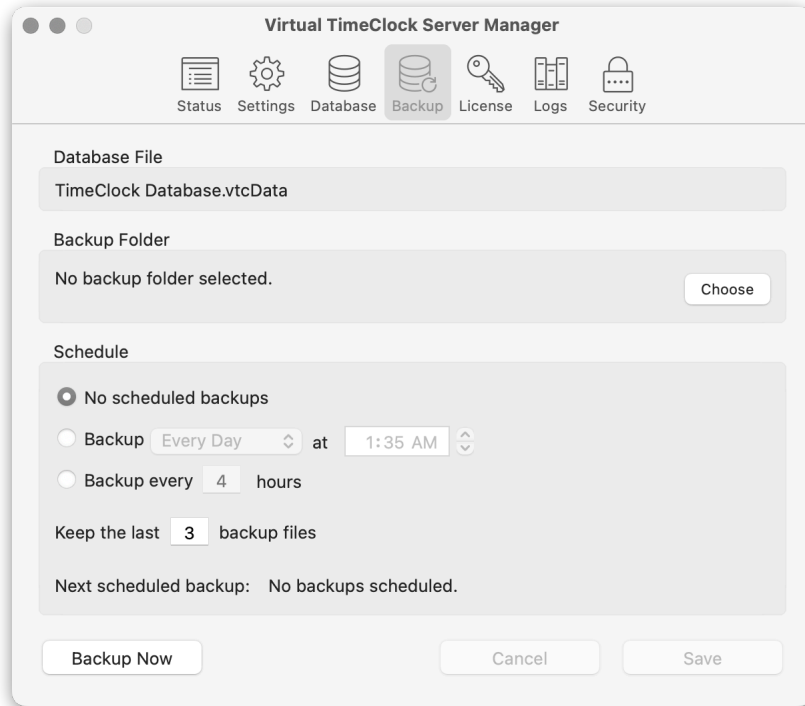
Need to show employees how to use the time clock? Print the [User Quick Reference](#) from the **Help** menu.



Always **Turn Administration Off** before leaving the computer unattended and allowing users to clock in/out.

M. Schedule Backups

To schedule a regular TimeClock database backup, open the **Virtual TimeClock Server Manager** program and click the **Backup** icon in the toolbar. Here you can set the backup schedule or do a manual backup by clicking **Backup Now**. Click to learn more about [backups in Virtual TimeClock](#).



Important:

Don't store backup files on the same computer as your TimeClock. If your computer crashes, the backups will be lost as well. Always backup to an external drive or folder.

Congratulations! Virtual TimeClock is now setup and ready to use!



Need more help with the topics covered in this guide? Check out the [Administrator Quick Reference](#) found in the **Help** menu of the Server Manager and any time clock Client.