# Virtual TimeClock Pro® Setup Guide

This guide will orient you to Virtual TimeClock and walk you through the essential setup required for a new user of Virtual TimeClock Pro. For installation follow the steps on our installation guide. If you are moving your TimeClock or upgrading your software, review the moving guide or the upgrading guide.

Topics discussed in this Setup Guide:

A. Creating Company Database

1. After successful installation of the software, the Welcome window will automatically launch. You can either register for a **Free Trial** license or choose **Enter Key** to register your existing license.
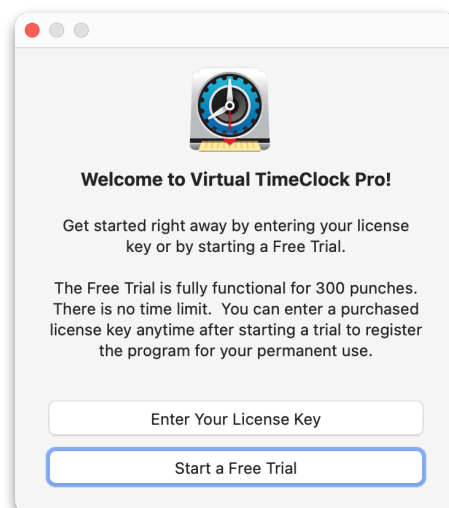
2. After registering for your free trial, you can choose to open **Sample Data** to explore the software with pre-populated users or open your new **My Company** database to add your users. If you registered an existing license, choose an option to open your company database.

3. After creating a new company, you will be prompted to add users. 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.
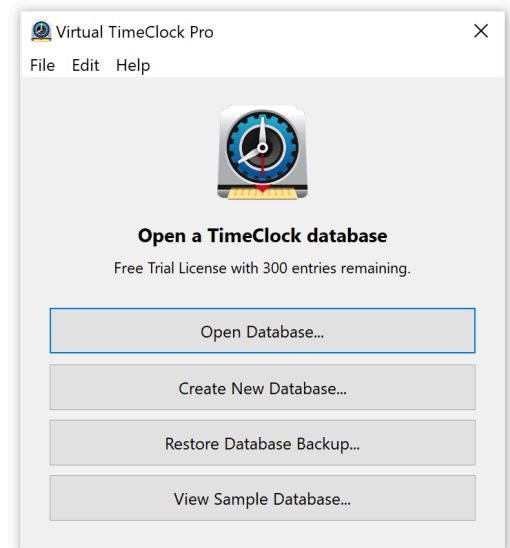
B. Add Users

1. If you want to add employees as users now, click **Add Users.** After entering a user's information click **Save & Next** to continue adding users or **Save & Close** to finish adding users.

2. 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.
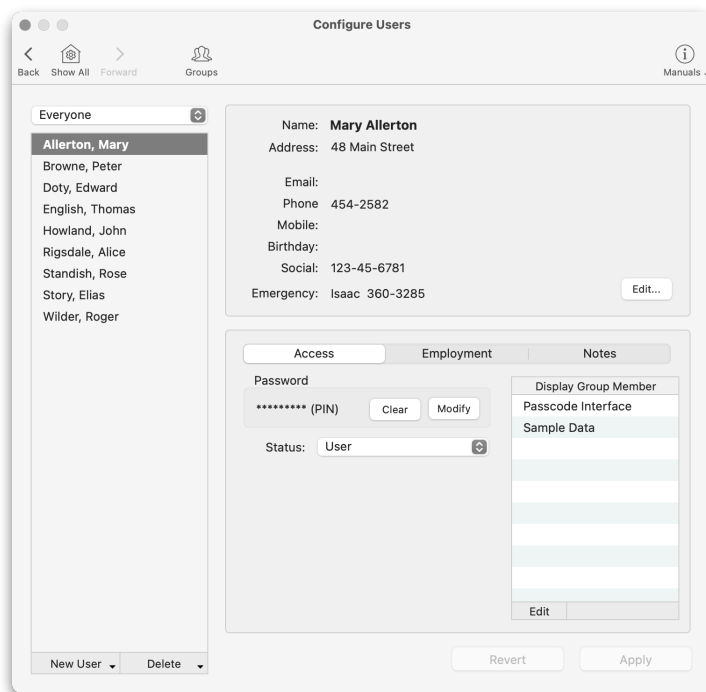
Use the popupmenu at the top of the User list to filter which users are displayed.

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

3. 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.
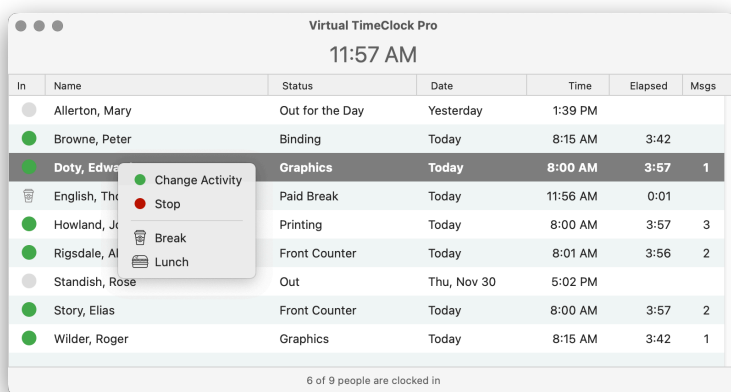
D. Display Groups

To continue with setup, 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 users. In short, these settings affect the display and options of the TimeClock for users. This is also where manager permissions are set, giving them access to reports and administrative functions. *TimeClock Users* is the default group and includes all users.

1. With the **Settings** tab selected, choose the group interface users will clock in on.

2. Choose between the In/Out Board, with the list of names, PIN, with numeric passwords or passcode.

3. Decide if users will use a password.

4. 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.

5. Review the default settings by going though 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.
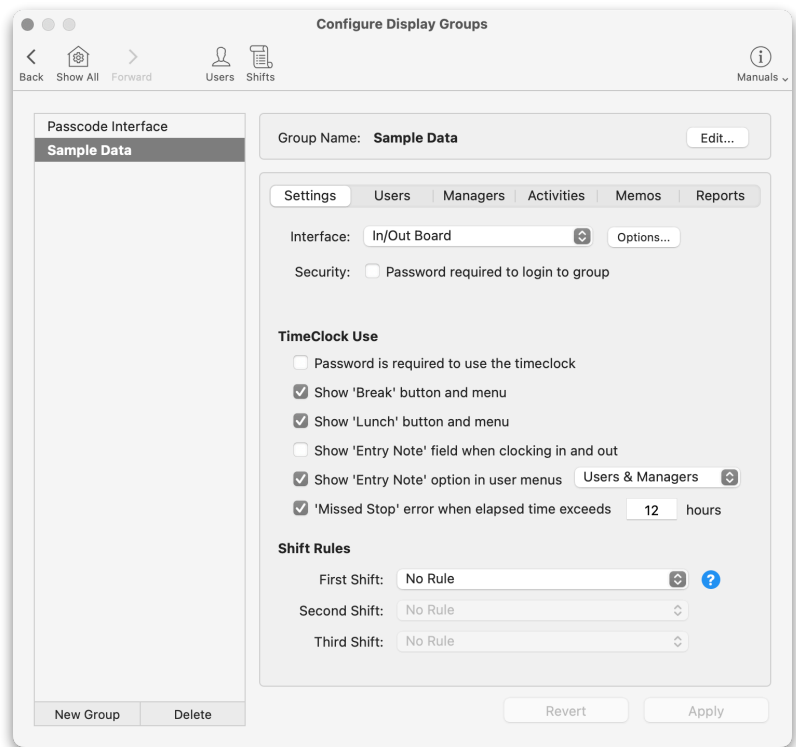
Below are examples of the different interfaces available in Virtual TimeClock

In & Out Board Interface
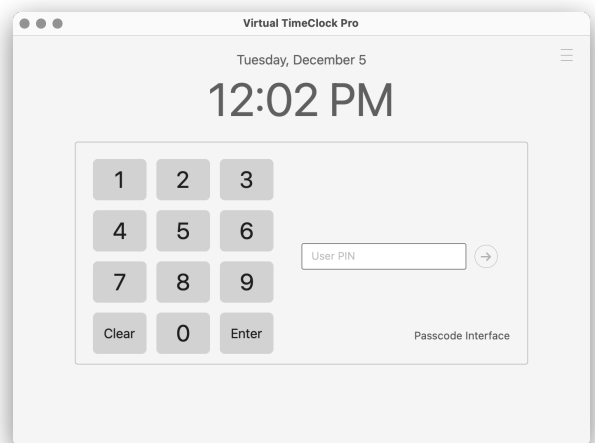
PIN Interface

E. 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**, so users do not see the time other users clocked in.

- To login to a different display group, log out of Administrator mode and select which display group user mode will display.

F. Assigning Administrators & Managers

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

Managers are assigned to a display group meaning that they can only view reports or edit entries for users that are members of the display group. A manager can be both a user and manager of a group. Assign a user to be a manager of a group by going to the **Managers** tab of the Display Groups window. 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 on administration mode from the File menu using their name and password. However, unlike an Administrator, Managers will only see the Display Group, reports and features that an Administrator has granted them access to.

To continue setup click **Show All** in toolbar. While in administration mode you can revisit this window by clicking the Configure gear icon in the toolbar on the In & Out Board. You can access TimeClock features directly through the menu bar while in Administration mode by clicking **Configure**. The different configuration categories are organized in the sections **People, Groups, System,** and **Data.**
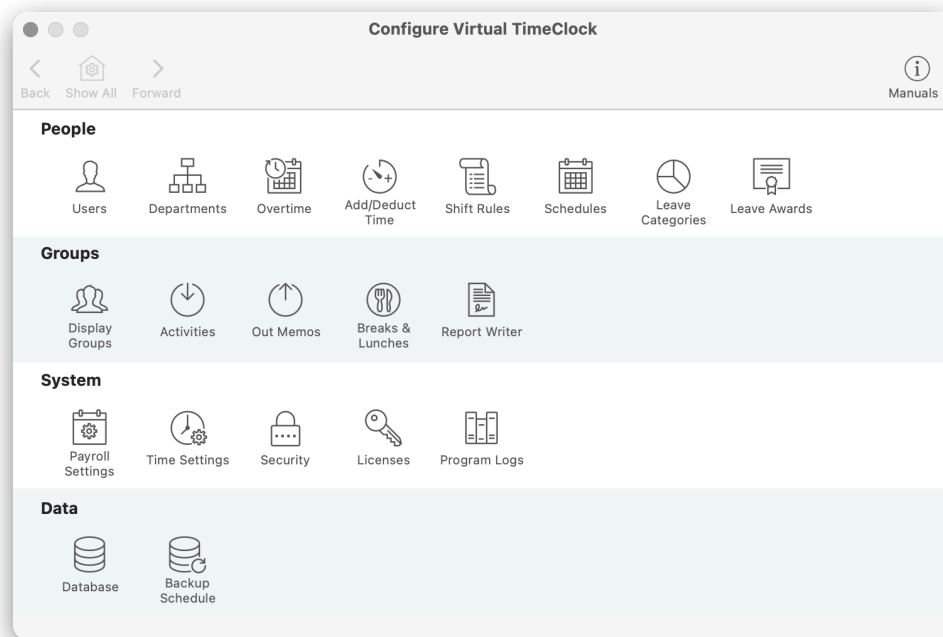
G. Breaks & Lunches

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 and lunches are paid, paid with a limit of time, or unpaid.

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 Configure Shifts window.

Go to **Configure > Auto Add/Deduct Time** if you want to track lunch, but do not need to have employees clock out for lunch.

H. 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

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

I. Overtime Settings

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

1. Select the built-in rule you want to edit and then click **Modify Rule** to set thresholds and rates.

2. Click **Add** to create a new Rule.

3. Assign an overtime rule to users in the main panel by clicking **Edit** and selecting the users to apply the rule.

> **Important Note:** Users can only be assigned to one overtime rule.
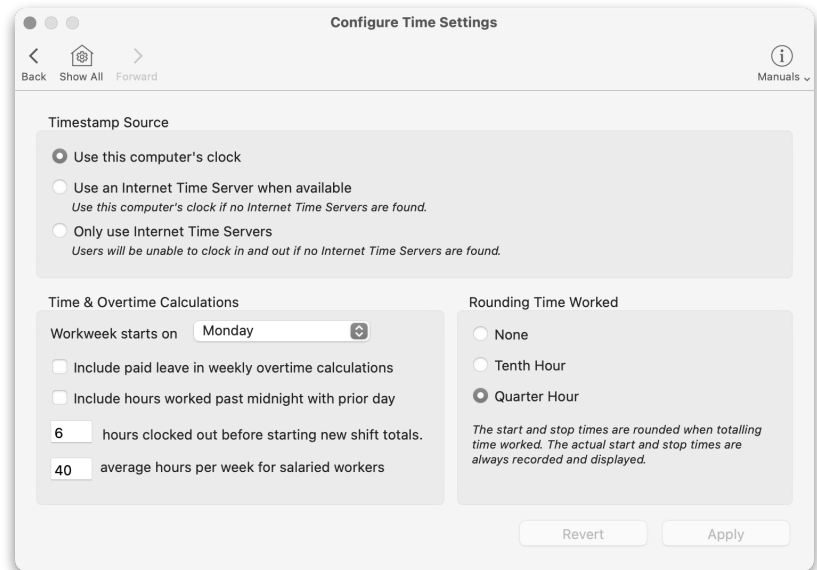
J. Payroll Settings

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.

K. 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.

2. Set your workweek start day. This does not affect your payroll period. It will affect how your weekly totals are displayed on reports.

3. Select the time rounding setting. This is based on how hour totals will be displayed. This will not change the recorded start and stop times, only how the hours are calculated. Find out more.

Configure Time Settings	

Timestamp Source

○ Use this computer's clock

○ Use an Internet Time Server when available
Use this computer's clock if no Internet Time Servers are found.

○ Only use Internet Time Servers
Users will be unable to clock in and out if no Internet Time Servers are found.

Time & Overtime Calculations

Workweek starts on   Monday

☐ Include paid leave in weekly overtime calculations

☐ Include hours worked past midnight with prior day

6   hours clocked out before starting new shift totals.

40   average hours per week for salaried workers

Rounding Time Worked

○ None

○ Tenth Hour

● Quarter Hour

The start and stop times are rounded when totalling time worked. The actual start and stop times are always recorded and displayed.

Revert   Apply

> Time Rounding: With quarter hour rounding, 8:07 rounds down to 8:00 and 8:08 rounds up to 8:15.

L. Security Rules

Password protecting administrative features will prevent employees from editing their own timecards and buddy punching. You can set security settings by selecting **Security** within the **System** section of the Configure window.

1. Requiring a password to turn on Administration is recommended for security and 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. Rules can be tightened or loosened based on your organization's needs.

M. Schedule Backups

Backups are important because they enable you to restore lost data from unexpected events such as power or internet outages and hardware failures. To schedule a regular time clock database backup, select **Backup Schedule** within the **Data** section of the Configure window. Learn more about backups by reviewing our Overview of Backups Knowledge Base article.

1. Select desired backup schedule frequency. It is not required to backup Virtual TimeClock, but it is highly recommended. A manual backup can be performed in Administration mode from the In & Out board toolbar.

2. Choose backup folder and location. We recommend saving backups to a USB or Cloud service like Dropbox or OneDrive, so a computer crash does not wipe out all data.

   - If a scheduled backup is chosen, the computer with the time clock much be on and the time clock running at the time of scheduled backup or the backup will not be completed.

   - **Important Note:** Do not store the backup on the same computer as the time clock. This does nothing to protect your data from disaster, computer theft or hard drive crash.

N. Licensing

After you purchase a license from Redcort Software, an email containing the license key will be sent to you. To activate it go to **Help**, then **License Key.** The software will continue to run in eval mode until a valid license key is entered. Click to learn more about Virtual TimeClock free trials.

O. 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 are logged into Administration Mode, the toolbar of icons and functions are visible as well as the Configure settings. TimeClock functions can be accessed directly from the program menu by clicking the Configure menu bar or select the Configure icon in the Administrative toolbar. Below is what the TimeClock looks like in Administration Mode.

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

User Mode: In & Out Board

User Mode - PIN Interface

Need to show employees how to use the time clock?
Print the User Quick Reference from the **Help** menu.

Congratulations! Virtual TimeClock Pro 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 for details on all program functions.