

# Thoroughbred<sup>®</sup> TimExpress User Manual



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# FILE MAINTENANCE

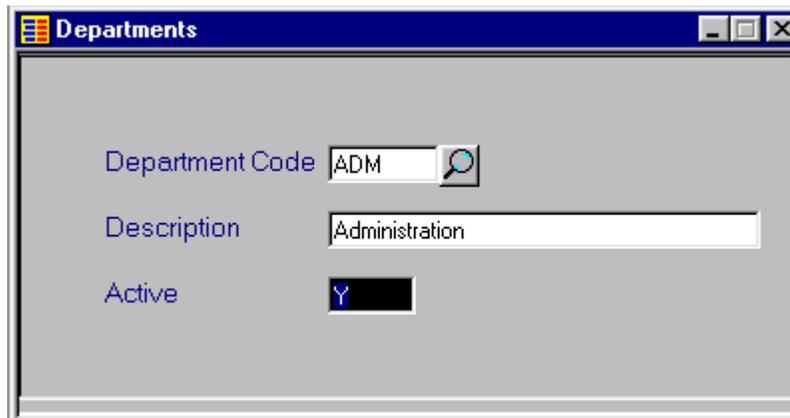
Under File Maintenance in **TimExpress** you will find all set up parameters. To use the **TimExpress** application area, you must set up employees and other basic information under File Maintenance as listed below:



## Departments

You can assign employee's time to specific departments. You can enter departments as follows:

**Navigation:** File Maintenance/Departments



Field	Comments
Department Code	Here you can enter a department code. A maximum of 5 characters can be entered, both numbers and letters. The code must be unique - you cannot use the same code twice. You can set up as many codes as you like. Use codes that are easy to remember and describe the department, for example: for Administration enter ADM.
Description	Here you can enter the name of the department or division. You can enter a maximum of 30 characters, both numbers and letters. For example, if the code is ADM, the contents of the Description field can be: Administration.
Active	Here you can specify whether the department is active or inactive as follows: <ul style="list-style-type: none"> <li>• Y – Active</li> <li>• N - Inactive</li> </ul>

### Add a Record

To add a new department type in a new Department Code and the following message will be displayed:



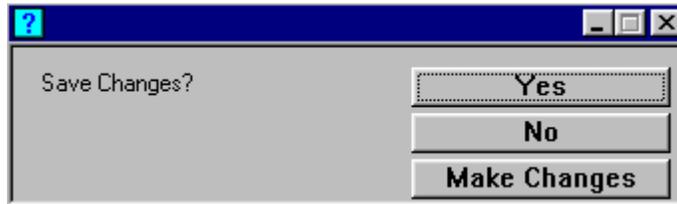
### Look Up

To look up the departments click on the magnifying glass icon  and the following Department Listing will be displayed:

Departments		
Department Code	Description	Active
Dept1	First Dept.	Y
Fin	Finance Department	Y
Sales	Sales Department	Y

## Modify

To modify a department, highlight the Department you wish to modify and left double click your mouse. When you close the window you will get the following message:



You will also get this message when you add a new record.

Button	Comments
Yes	Changes will be saved.
No	Changes will not be saved.
Make Changes	Will take you back to the department window to make more changes.

## Employee Data

This section describes how to set up employee information. Employee information includes employee name, address, and other information.

**Navigation:** File Maintenance/Employees

The screenshot shows a window titled "Employee Data" with the following fields and values:

- Employee Code: 000000001
- Name: First: Leon, Last: Somersall
- Phone: 610-555-1212, SSN: 111-111-111
- Address: 569 Main Street
- City.St.Zip: Leola, PA, 12345
- Department: Dept1, First Dept.
- Schedule: Shift1, Default Schedule
- Pay Type: Hrly1, Hourly Employee
- Level: 0, System Administration
- Start Date: 01/01/68, End Date: (empty)
- Active: Y

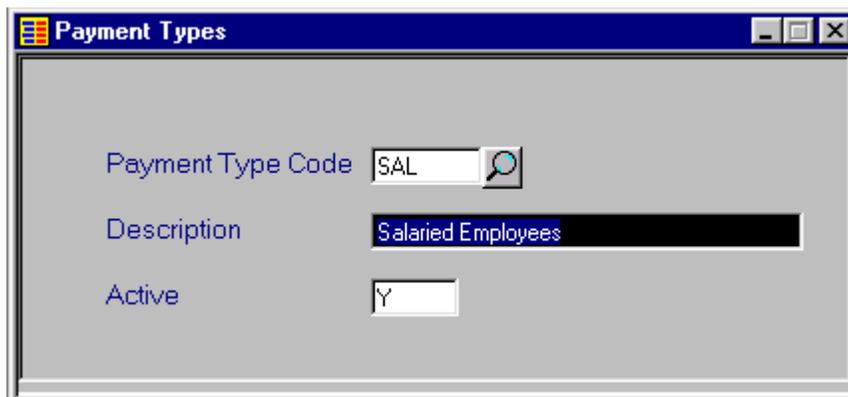
Field	Comments
Employee Code	Here you can enter a number for the employee. You can enter a maximum of 10 characters, number only.
Name, Phone, SSN, Address, City, St, Zip	Enter the appropriate information as it pertains to the employee.
Department	Here you can choose a department code to assign to the employee. To see the Department Codes in the Department table, click the  magnifying glass icon to the right of the field.
Schedule	Here you can choose a schedule to assign to the employee. To see the Schedule Codes in the Schedule table, click the  magnifying glass icon to the right of the field.

Field	Comments
Pay Type	Here you can choose a Pay Type to assign to the employee. To see the Pay Type Codes in the Pay Type table, click the  magnifying glass icon to the right of the field.
Level	Here you can choose a security level to assign to the employee. Selections are as follows: <ul style="list-style-type: none"> <li>• Level 0 – System Administration</li> <li>• Level 1 – Payroll Setup</li> <li>• Level 2 Managerial Level</li> <li>• Level 3</li> <li>• Level 4</li> <li>• Level 5 – Standard Employee</li> <li>• Level 9 – No System Use Allowed</li> </ul>
Start Date/End Date	Here you can enter the date on which the employee became inactive, due to disability or maternity leave, for example.
Active	Here you can specify whether the employee is active or inactive as follows: <ul style="list-style-type: none"> <li>• Y – Active</li> <li>• N - Inactive</li> </ul>

## Payment Types

This section describes how to set up Payment Types. Payment Types can be defined as per your business needs.

**Navigation:** File Maintenance/Payment Types



The screenshot shows a window titled "Payment Types" with the following fields:

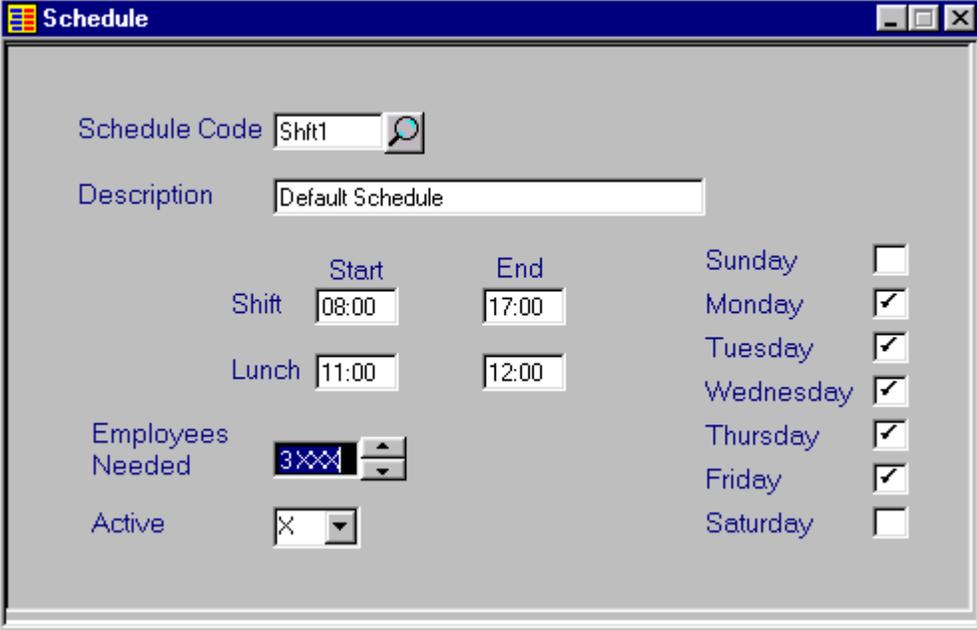
- Payment Type Code:** A text box containing "SAL" with a magnifying glass icon to its right.
- Description:** A dropdown menu with "Salaried Employees" selected.
- Active:** A text box containing "Y".

Field	Comments
Payment Type Code	Here you can enter a Payment Type Code. You can enter a maximum of 5 characters, both numbers and letters. The code must be unique - you cannot have the same code twice. You can set up as many codes as you like. Use codes that are easy to remember and describe the Payment Type, for example: for Salaried enter SAL.
Description	Here you can enter the name of the Payment Type. You can enter a maximum of 30 characters, both numbers and letters. For example, if the code is SAL, the contents of the Description field can be: Salaried Employees.
Active	Here you can specify whether the Payment Type is active or inactive as follows: <ul style="list-style-type: none"> <li>• Y – Active</li> <li>• N – Inactive</li> </ul>

## Schedules

This section describes how to set up Schedules. Schedules can be defined as per your business needs.

**Navigation:** File Maintenance/Schedules



Schedule Code: Shift1

Description: Default Schedule

	Start	End	Sunday
Shift	08:00	17:00	<input type="checkbox"/>
Lunch	11:00	12:00	<input type="checkbox"/>

Employees Needed: 3

Active: X

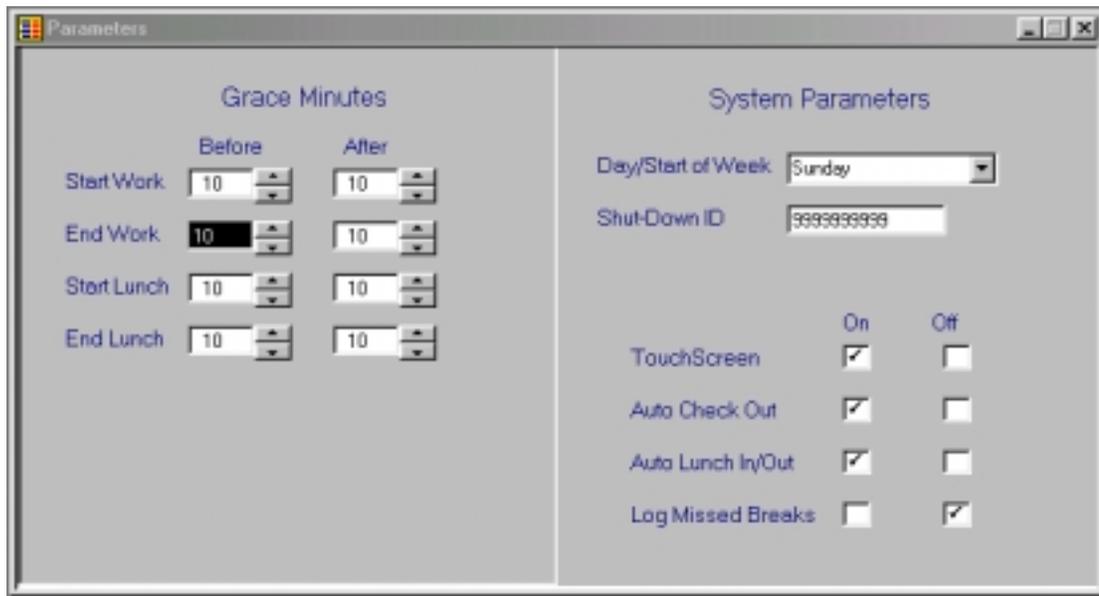
Day	Active
Sunday	<input type="checkbox"/>
Monday	<input checked="" type="checkbox"/>
Tuesday	<input checked="" type="checkbox"/>
Wednesday	<input checked="" type="checkbox"/>
Thursday	<input checked="" type="checkbox"/>
Friday	<input checked="" type="checkbox"/>
Saturday	<input type="checkbox"/>

Field	Comments
Schedule Code	Here you can enter a Schedule Code. You can enter a maximum of 5 characters, both numbers and letters. The code must be unique - you cannot have the same code twice. You can set up as many codes as you like. Use codes that are easy to remember and describe the Schedule Type, for example: for Shift 1 enter SHFT1.
Description	Here you can enter the name of the Schedule Type. You can enter a maximum of 30 characters, both numbers and letters.
Start/End Time For Shift and Lunch	Here you can enter the starting and ending time of the schedule for the shift and for lunch break.
Employees Needed	N/A – For future use with Scheduling Module.
Days of the Week	Here you can specify which days of the week employees' work for the schedule. A <input checked="" type="checkbox"/> checkmark in the box designates that employees assigned to the shift are required to work that day.
Active	Here you can specify whether the Payment Type is active or inactive as follows: <ul style="list-style-type: none"> <li>• Y – Active</li> <li>• N - Inactive</li> </ul>

## Business Parameters

This section describes how you can enter general setup information.

**Navigation:** File Maintenance/Business Parameters



### Grace Minutes

Field	Comments
Before and After Grace Minutes	Here you can set up different grace periods for each punch type. For example if when an employee punches in for work at 8:09 and you don't want to dock their pay you can set up 10 grace minutes and the system will roll back their time to 8:00.

### System Parameters

Field	Comments
Day/Start of Week	Here you enter the workweek start date.
Shut-Down ID	Required to shut down the Touch Screen.
Payroll Interface	If you are interfacing to a payroll system check this box on.
Touch Screen	Here you can turn on the Touch Screen functionality if you are using it.
Auto Check Out	Here you can turn on functionality to have TimExpress automatically check employees out at the end of workday, if you only want employees to punch in.

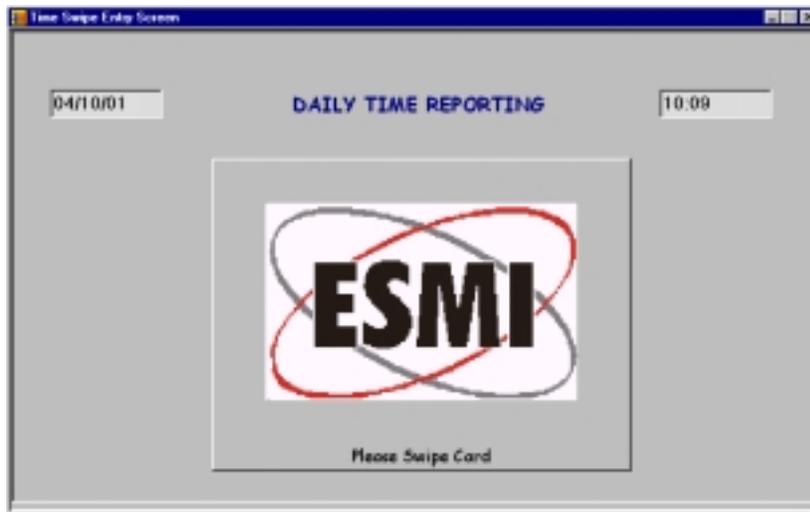
<b>Field</b>	<b>Comments</b>
Auto Lunch In/Out	Here you can turn on functionality to have TimExpress automatically check in and out for lunch breaks.
Log Missed Breaks	Here you can turn on functionality to have the system log missed breaks.



# TIME SWIPE ENTRY

Employees can check in/out a variety of ways with TimExpress. They are as follows:

1. Touch Screen
2. Keyboard
3. Mouse
4. Keypad



## Daily Time Reporting

When employees swipe in, the following menu will appear:

The screenshot shows a software window titled "Time Swipe Entry Screen" with a "DAILY TIME REPORTING" header. At the top left is a date field containing "04/10/01" and at the top right is a time field containing "10:10". Below these are input fields for "Employee Name" (Leon Somersall), "Department" (First Dept.), "Date" (04/10/01), and "Time" (10:10). To the right of these fields are six buttons: "-Check In-", "-Check Out-", "-Start Lunch-", "-End Lunch-", "-Start Break-", and "-End Break-". At the bottom left, a "Last Entry" section displays "04/10/01" and "Checked In" at "10:10". A "-Cancel Swipe-" button is located at the bottom right.

Field	Comments
Employee Name and Department	This information will default in from the employee master record.
Date and Time	The computer system date and time will default in.
Last Entry	The last time entry will always be displayed in these fields.
Check In/Out Start/End Lunch Start/End Break	The employee touches the appropriate button and the system creates a time entry.
Cancel Swipe	If the employee clicked on the incorrect icon they can cancel their swipe.

# ADDING AND EDITING TIME

**TimExpress** allows you to edit employee time quickly and easily for situations like adding missed, vacation, and sick days or punches or changing time because an employee punched in late even though they were at work.

## Editing Time

**Navigation:** File Maintenance/Employees/Time Clock icon 



Date	Time In	Out	Lunch Start	End	Total	Brk 1 Start	End	Brk 2 Start	End	Pay Type	Sched	Dept
04/10/01	10:10	0:00	0:00	0:00	.00	0:00	0:00	0:00	0:00	Hrly1	Shft1	Dept1
03/29/01	0:00	0:09	0:05	0:01	21.00	0:03	0:19	0:00	0:00	5		9
03/28/01	0:00	0:09	0:05	0:01	21.00	0:03	0:19	0:00	0:00	5		9
03/27/01	0:00	0:09	0:05	0:01	21.00	0:03	0:19	0:00	0:00	5		9
03/26/01	0:00	0:09	0:05	0:01	21.00	0:03	0:19	0:00	0:00	5		9
03/25/01	0:00	0:09	0:05	0:01	21.00	0:03	0:19	0:00	0:00	5		9
03/24/01	0:00	0:09	0:05	0:01	21.00	0:03	0:19	0:00	0:00	5		9
03/23/01	0:00	0:09	0:05	0:01	21.00	0:03	0:19	0:00	0:00	5		9
03/22/01	0:00	0:09	0:05	0:01	21.00	0:03	0:19	0:00	0:00	5		9
03/21/01	0:00	0:09	0:05	0:01	21.00	0:03	0:19	0:00	0:00	5		9
03/20/01	0:00	0:09	0:05	0:01	21.00	0:03	0:19	0:00	0:00	5		9
03/19/01	0:00	0:09	0:05	0:01	21.00	0:03	0:19	0:00	0:00	5		9
03/18/01	0:00	0:09	0:05	0:01	21.00	0:03	0:19	0:00	0:00	5		9
03/17/01	0:00	0:09	0:05	0:01	21.00	0:03	0:19	0:00	0:00	5		9

To edit time follow the following steps:

1. Click your mouse on the field in which you wish to edit
2. Type in the correct time
3. Select **Enter** and the time will be updated.

---

### Note:

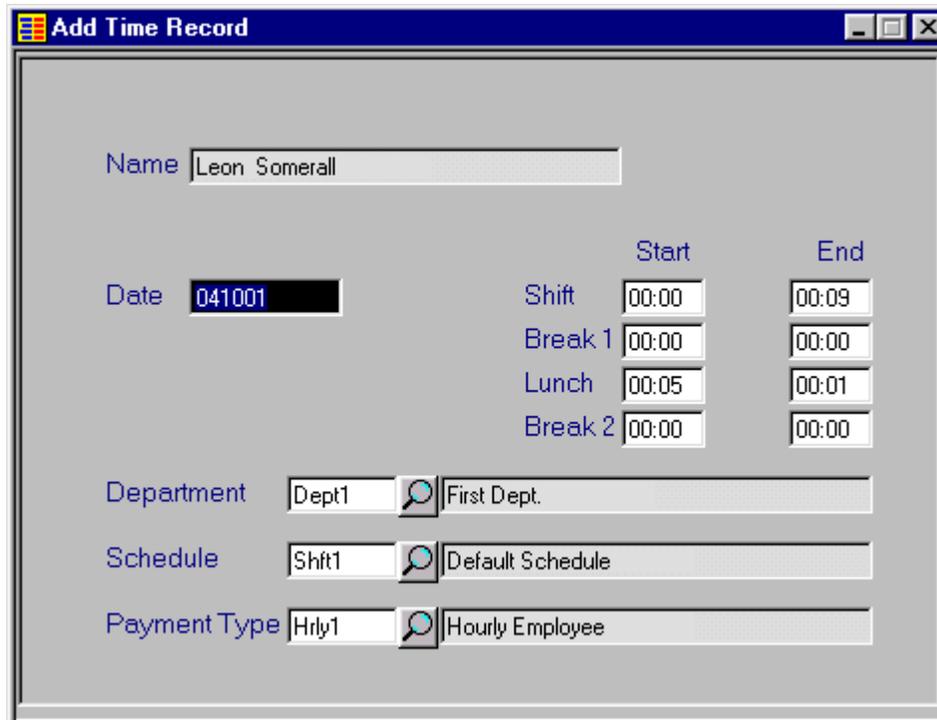
You can also **override default departments, schedules, and payment types on this screen.** For example you have an employee that you loan to another department for the day and you want their time to be charged to the other department. A history file is stored on each punch and is available to maintain audit trail of original entries

---

## Add Time Record

If you need to enter a new record for an employee you can do it in the Add Time Record Window.

**Navigation:** File Maintenance/Employees/Time Clock icon /Time Clock icon 



Field	Comments
Employee Name	Defaults in.
Date	Defaults in today's date, can be modified.
Department, Schedule, and Payment Type	Defaults in.
Start/End Times for Shift, Breaks and Lunch	Defaults in from Schedule, however these fields can be modified.

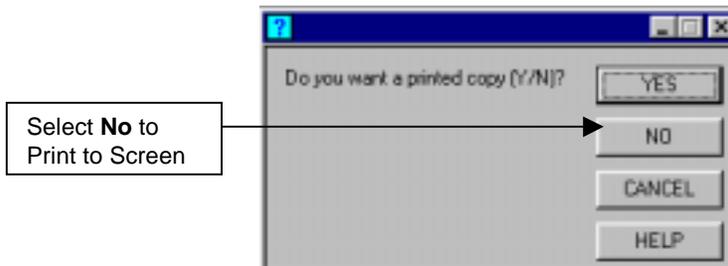
# REPORTS

## Report Menu

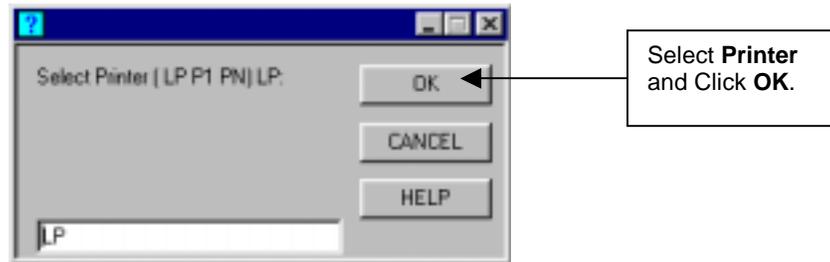
The following reports can be printed from **TimExpress**:



When printing reports in **TimExpress** you have the option to view on the screen or print:



When sending to the printer the following window is displayed, so you can select a printer:



## Attendance Reports

**Navigation:** Reports/Attendance

The screenshot shows a window titled "Reports" with the following fields and controls:

- Report Type:** A dropdown menu with "Attendance" selected.
- Date Range:** A dropdown menu with "Today" selected, and two date input fields labeled "Start" and "End", both containing "04/10/01".
- Employee:** A text input field with a search icon and "All" selected.
- Department:** A text input field with a search icon and "All" selected.
- Schedule:** A text input field with a search icon and "All" selected.
- Payment Type:** A text input field with a search icon and "All" selected.
- Buttons:** "Reset" and "Print" buttons at the bottom right.

Field	Comments
Report Type	<p>Here you can select the following report types by using the drop down arrow:</p> <ul style="list-style-type: none"> <li>• Attendance</li> <li>• Variations</li> <li>• Absent</li> </ul>
Date Range	<p>Here you can select the following Date Range you want for your report:</p> <ul style="list-style-type: none"> <li>• Today</li> <li>• Yesterday</li> <li>• This Week</li> <li>• Last Week</li> <li>• This Month</li> <li>• Last Month</li> <li>• Custom - enter specific Start and End Dates</li> </ul>

Field	Comments
Employee	Here you can enter an employee number for a specific employee you want to print the report for. To see an employee list, click the  magnifying glass icon to the right of the field. The system default is All to print the report for all employees.
Department	Here you can enter department for a specific department you want to print the report for. To see a department list, click the  magnifying glass icon to the right of the field. The system default is All to print the report for all departments.
Schedule	Here you can enter schedule for a specific schedule you want to print the report for. To see a schedule list, click the  magnifying glass icon to the right of the field. The system default is All to print the report for all schedules.
Payment Type	Here you can enter payment type for a payment type you want to print the report for. To see a payment type list, click the  magnifying glass icon to the right of the field. The system default is All to print the report for all payment types.

### Attendance Report

```

TI-RATTH1
04/10/01

Attendance Report
Date Range: 04/10/2001 - 04/10

Employee
Code      Name          Phone      Start Date  En
-----
000000001 Leon Sonerall 610-555-1212 01/01/68YY

Date      Start      **Break**      **Lunch**      **Br
04/10/01YY 10:10      Leave  Return  Leave  Return  Leave
0:00      0:00      0:00      0:00      0:00

Exception:Not Scheduled for Tuesday; Missing Punch

```

**Attendance Variations**

```

TI-RATTMB
04/10/01
Attendance Variations
Date Range: 04/10/2001 - 04/10

Employee
Code      Name      Phone      Start Date  En
-----
0000000001 Leon Sonerall 610-555-1212 01/01/68YY

          ***** Lunch *****
Date      Start - Sched.  Leave - Sched.  Return - Sched.
-----
04/10/01YY 10:10  0:00      0:00  0:05      0:00  0:01
Exception: Not Scheduled for Tuesday; Missing Punch
    
```

**Missing Attendance**

```

TI-RATTMB
04/10/01
Missing Attendance
Date Range: 04/10/2001 - 04/10/2001
Page: 1
12:30 PM

Employee
Code      Name
-----
0000000001 Leon Sonerall

Missing Date      Schedule
-----
10/28/01YY      SHIF1  SHIFT 1
    
```



TI-RSCHED1  
04/10/01

Schedule Listing  
Eastern Systems Management, Inc.

Page: 1  
12:14 PM

Schedule Code	Description	Start	End	Active
SHIF1	SHIFT 1	8:00	5:00	Y
		*** Lunch ***		** Days **
		Start	End	SMTWTFS
Employees Needed:	10	12:00	1:00	XXXXX

*Security Level Listing Report*

[Navigation](#): Reports/Security Levels

TI-RLEUL1  
04/10/01

Security Level Listing  
Eastern Systems Management, Inc.

Security Level	Description
0	System Administration
1	Payroll Setup
2	Management Level
3	Level 3 Security
4	Level 4 Security
5	Standard Employee
9	No System Use Allowed

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