User Manual

HR·Ware Optima™ Time Clock

The Perfect Solution for Employee Time Tracking and Administration

Version 8 Rev. a

Optima Time Clock Program and User Manual
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Chapter 1:
Welcome!

Thank you for choosing Optima Time Clock by G.Neil. This application replaces mechanical time clocks, eliminating hand correcting and tallying of time cards and dramatically reducing payroll prep time.

When combined with Optima Attendance Controller, this powerful tool provides a comprehensive time and attendance tracking system for your business. Features include:

- Easy clocking in/out using keyboard or swipe card
- Detailed time and date stamping of all entries, including supervisor changes
- Instant knowledge of employee status through a virtual in/out board
- Fully customizable work schedules, rounding rules, overtime settings and more
- Data export function to major payroll provider software
- Direct transfer of time card runs into employee timesheets in QuickBooks® Pro and Premier Editions 2003 and/or 2004
- Flexible security access for employee and managers alike
- Integration with other Optima programs simplifies data entry

Chapter Contents:

Unlocking the Demo

If you have already installed the demo of Optima Time Clock, you can unlock it by following the steps listed here.

1. Run Optima Time Clock.
2. Select Alter Current Product License from the Help menu; click the Edit key.
3. Enter the Product Key you received with your purchase (it starts with the letter T). You'll find this on the inside of the Optima CD sleeve.
4. Click OK. If the confirmation message does not appear, verify that you entered the correct key. The key is not case sensitive.

NOTE: There is a different product key for each G.Neil software product.

System Requirements

Minimum Requirements

- Windows 98 (SE) or later
- Pentium 266MHz or faster processor
- 64 MB available RAM (Random Access Memory)
- 30 MB available hard disk space*
- Access to a CD-ROM drive
- SVGA monitor with 800 x 600, 16-bit color depth or higher

* Database size dependent on amount of data.

Recommended Requirements

- Pentium III or higher processor
- 128 MB available RAM (Random Access Memory)
- 30 MB available hard disk space*
- CD-ROM drive
- SVGA monitor with 1024 x 768, High Color or higher
- Windows compatible, graphics-quality printer
- Database must reside on a Windows-based operating system

* Database size dependent on amount of data.

Network Requirements

- **Windows-based Server or PC** – The included Interbase database is not compatible with a non-Windows-based operating system, such as Novell. However, you may run the database on a Windows-based server or PC connected to a non-Windows based network.
- **A static (persistent) IP address** so that the database will be always connected to the client application

- **Proper user license** – The database will only allow the purchased number of users to be connected at any one time to the database. Wide-Area Networks (WAN) require a WAN license based on the number of geographic locations. The Product Key is affixed to the inside cover of the CD sleeve.
- **CD-ROM drive** or access to our software product download area on www.gneiltechsupport.com.

Magnetic Stripe Card Specifications .....

This information is if you are going to utilize a card reader.

- Keyboard Wedge – The reader may be a magnetic stripe card or bar code reader. We have tested with a keyboard wedge, which the keyboard connects into the reader and then to the computer.
- Formats: ISO 7811, AAMVA, and CA DMV.
- Cards must be pre-encoded (on one track only) with up to 24 alphanumeric characters on track 1, 2 or 3, with a single carriage return at the end.
- Contact G.Neil at (800) 999-9111 to order card readers and ID Badge Kits. If you have a technical question, please contact G.Neil Tech Support at (888) 925-7740.

Chapter 2: Installing Optima Time Clock

This chapter explains how to install Optima Time Clock to a Network or Standalone computer and answers frequently asked questions about installing.

Chapter Contents:

Overview

Optima Time Clock can be installed on a single standalone workstation or a network for database sharing among several users, depending on your needs.

Regardless of which license you purchased, you may install the database to a network directory for the purpose of backup. Please consult your network administrator before installing to a network directory.

License Options

The license options currently available:

- **Single User** – Only one application of the Time Station and one application of the Time Clock Admin can run at a time.
- **Five Users** – Five applications of the Time Station and five applications of the Time Clock Admin can run at the same time when connected to a single, common database.
- **Ten Users** – Ten applications of the Time Station and ten applications of the Time Clock Admin can run at the same time when connected to a single, common database.
- **Unlimited User License** – Any number of users can run either the Time Station and/or Time Clock Admin application at the same time when connected to a single, common database.
- **Wide-Area Network (WAN) License** – This is an unlimited multi-site license based on the number of geographic locations where application clients are connecting to a single, common database.

IMPORTANT NOTE ON UPGRADING

If you are upgrading from a previous version of Attendance Controller or Confidential Employee Record, please read the section on Upgrading BEFORE installing Optima Time Clock.

Frequently Asked Questions

Q: Can I map the drive to the database as I did in Version 6 of your other software?

A: No. There is no mapping involved. If the database is on a network drive, the Client Workstation communicates to the Server through TCP/IP. When you enter the path for the Server, it must be "as seen" from the Server. (For example, if the Server Name is Server 1 and the Optima Database Path on the Server is:

c:\program files\gneil optima\hrware\hrware.gdb

then this is what will be entered (EXACTLY) when installing to a Client Workstation.

Q: What do I need to know before installing to a network drive?

A: Installing the database to the network and the program files to a Client Workstation(s) is a two-step process. You'll need to install onto the Server (must be physically at the Server), and then to the Client Workstation(s). Keep these things in mind:

1. No drive mapping is involved.
2. TCP/IP must be installed at the Client and Server if database is on the Server.
3. When installing to the Server, you will be prompted to write down or print out the Server name and database path. Make sure you write these down EXACTLY as shown. You cannot install to the Server from the Client. When installing to the Client and when prompted for the Server name and database path, enter these in EXACTLY as shown from the Server install. NO DRIVE MAPPING IS NEEDED.
4. After installing check to make sure you can run the program from the Server. If you're having problems connecting to the database, check to make sure you have System – Full Control on the Optima folder.

Q: What is the difference between the Time Station and the Time Clock Admin?

A: The **Time Station** is where your employees clock in/out from and is usually installed on a computer(s) in a convenient location accessible to employees. This computer can also have a swipe card reader attached to make clocking in/out easier. The **Time Clock Admin** is for managers and supervisors. This is where administrative work is done, such as setting up Time Clock access, and editing and printing time cards.

Q: What type of install (Standalone, Server, or Client) should I perform?

A: We recommend putting the database on the Server and the program on a Client Workstation. A Server has a less likely chance of locking up or crashing and allows the database to remain stable. A Client-Server installation requires 1) installing to a Server, and then 2) installing the Client(s).

Q: There isn't room on the C:\ drive on the Server. Can I install the database files and Interbase files to another drive other than c:\?

A: Yes. Follow these steps:

1. When installing Optima to the Server, install the program and database files first. Select Custom after the Setup type and click Next. This will give you the choice of where to install the program and database files.
2. After you click on Finish, it will prompt you to install Interbase, the database engine. Click Cancel to quit the installation process at this point.
3. Using **Windows Explorer**, navigate on the Optima CD to the **BIN\Interbase6** folder and run the **IBWIN32Setup.exe** file. This will allow you to install Interbase to a physical drive.

NOTE: The Optima files need to reside on a physical drive, not a mapped drive.

Installing from the CD Menu

To begin installing Optima follow these steps:

1. Close ALL running programs.
2. Insert the Optima CD-ROM into the appropriate drive of your computer.
3. The menu will appear. Select which product you want to install. (If the installation menu does not appear, click **Start**, **Run**. The Run dialog will appear. In the dialog box type **D:\setup. exe** where D: is the letter of your CD-ROM drive. Click OK or press **Enter**.)
4. Once the installation procedure begins, follow the on-screen instructions to install the software. See **Setup Types** below for more information. It is recommended that you accept the default setting for each step of the install process. If you are installing the software in a network environment (Client-Server Installation), you should consult your network administrator prior to installation. You must have proper network rights in Windows 2000, NT and XP in order to install Optima software.
5. When installation is complete, the G.Neil program group will be added to your Start menu and an Optima Time Clock icon will be on your desktop.

Setup Types

- **STANDALONE**: Use this option if you are installing to a standalone computer. This will install the application files (Time Clock Admin and Time Station) and database files to your local drive.
- **SERVER**: This is the first of two steps in the Client-Server Installation, either for true client-server configurations or peer-to-peer network that may be using a workstation PC for the database. Choose this option to install the database and application files (Time Clock Admin and Time Station) on the Server and before installing the Client application to PC workstations.
- **CLIENT**: This is the second step in the Client-Server installation. This will install the application files (Time Clock Admin and Time Station) and ask for the Server Name and Database Path.

After clicking on a Setup Type, you will have the following options:

- **EXPRESS**: We recommended that you select this option if you are installing or upgrading Optima for the first time. This will take you through the installation process with minimum user intervention.
- **CUSTOM**: This option is for Advanced Users who have specific installation needs, such as installing just the Time Station program on a client.

NOTE: A Client-Server Installation is recommended. The database is more secure than if you install it on a Standalone computer, especially when installing Optima Time Clock. When running Optima Time Clock on a Standalone computer, you run the risk of someone changing the clock settings and creating false time card entries. With a Client-Server Installation, the database and time are pulled from the server, not from the client workstation.

Network Installation – (Client-Server) .....

Installing a Client-Server setup is a two-step process. You will need to install to the Server first and then to the Workstation(s).

To install to a network requires these items:

- **Windows-based Server or PC** – The included Interbase database is not compatible with a non-Windows-based operating system, such as Novell. However, you may run the database on a Windows-based server or PC connected to a Non-Windows based network.
- **A static (persistent) IP address** so that the database will be always connected to the client application.
- **Proper user license** – The database will only allow the purchased number of users to be connected at any one time to the database. Wide-Area Networks (WAN) require a WAN license based on the number of geographic locations. The Product Key is affixed to the inside cover of the CD sleeve.
- **CD-ROM drive** or access to our software product download area on www.gneiltechsupport.com.

NOTE: G.Neil cannot provide technical assistance with setting up or maintaining your computer network. Please consult your computer manufacturer or network administrator before contacting G.Neil Tech Support.

Server Installation Instructions

Install to the Server first by following these instructions:

1. Insert the Optima CD on the Server. (Follow the CD Menu Instructions above.)
2. At the **Setup Type,** select **Server**. Click Next.
3. Select Express. Click Next.
4. **IMPORTANT STEP!**: Write down the Server Name and Database Path EXACTLY as they appear on the screen.
5. Click "I have written this information down." Click Close.
6. Click Next at the Current Settings screen. This will install the program files to the Server.
7. Click Finish. This will start the installation of the database files.
8. Click **Next**, then the **I Agree** button if you agree to the license.
9. After the installation, click **Finish**.
10. Follow the installation instructions for the Client Workstation.

NOTE: You only have to run the Server installation once. Then you may install multiple Clients for the Optima Version of Attendance Controller, Confidential Employee Record, or Time Clock, if purchased, or to run as a demo.

Client Workstation Installation Instructions

Install to the Client Workstation by following these instructions.

1. Insert the Optima CD on the Client Workstation. (Follow the CD Menu Instructions above.)
2. Select **Client** as the Setup type.
3. Select **Express**, then click **Next**.
4. Enter the Server Name and Database Path exactly as you wrote down from Step 4 of the Server Installation. Then Click **Next**.
5. Click **Next** at the Current Settings screen. This will install the program files to the Server.
6. Click Finish. This will start the installation of the needed files to run the database.
7. Click **Next**, then the **I Agree** button if you agree to the license.
8. After the installation, click **Finish**.
9. Install the Client for any other Optima versions. (You do not have to install to the Server again.) You may also install to other Workstations, if needed.
10. Double-click on the desktop application shortcut; the default Login and Password are **ADMIN**.

Standalone Computer Installation Instructions .....

Installing to a Standalone Computer requires these items:

- **Product Key** - Printed on the inside cover of the manual that came with your purchase.
- The Optima Version CD-ROM or Program Update from our web site.
- **A Computer** running a Windows-based operating system.

Installing to a Standalone Computer is quick and easy. Follow these steps:

1. Insert the Optima CD on Standalone Computer. (Follow the CD Menu Instructions above.)
2. Select **Standalone** as the **Setup Type**.
3. Click on **Express**, then click **Next**.
4. Click **Next** at the Current Settings screen. This will install the program files.
5. Click **Finish**. This will start the installation of the database files.
6. Click **Next**, then the **I Agree** button if you agree to the license.
7. After the installation, click **Finish**.
8. Double-click on the desktop application shortcut; the default Login and Password are **ADMIN**.

IMPORTANT NOTE FOR VERSION 6 AND EARLIER USERS

Optima Time Clock does not share the same database with Version 6 or earlier of Attendance Controller and Confidential Employee Record. You will need the Optima Version to share the database among the three separate programs. For this reason, you should also upgrade Confidential Employee Record to the Optima Version at the same time as Attendance Controller; otherwise, you may create multiple non-synchronized databases.

Quick Note About Peer-to-Peer Installations .....

A peer-to-peer connection allows you to share information between two computers without the need of a formal client-server connection. **The peer-to-peer connection must be in place before following these instructions**. See your Network Administrator for more details on setting up this type of connection.

On the host computer (the one on which you wish the database to reside), follow the instructions above for a Server installation. Write down the Server Name and Database Path when prompted. **Note:** The Server installation will install both the software client application and database files to the host computer. Then install the application Client on the other computer that will be sharing the information, entering the Server Name and Database Path when prompted.

Upgrading from previous versions .....

Upgrading from Version 7 to Version 8

If you're upgrading from Version 7 to Version 8, no conversion is required. Opening Optima for the first time will update the database to Version 8. The Optima program must have exclusive use of the database to perform the update. Because all Optima programs share the same database, you must upgrade all programs from Version 7 to Version 8 at once.

Version 3 and Below

If you're upgrading from Version 3 or below, you will need to upgrade to Version 6, if not already installed, and then convert the data to Version 7 before upgrading to Version 8. Version 6 and 7 are on the Optima CD under the BIN\Legacy directory. Please contact our Technical Support Department (see Chapter 14, Contacting Technical Support) if you have any questions.

NOTE: When running the Version 6 DB Repair, it may display information or error messages; click OK to continue through this process.

Remote Terminals .....

This section explains how our program works with remote terminals. A remote terminal is a data collection station that looks like a 10-key pad with a magnetic stripe card reader

attached. The remote terminal is connected by a network cable that allows you to have a small data collection station in areas where you don't want or need to have a full computer and monitor setup.

A remote terminal collects the data (such as someone clocking in/out) and sends the information to the database where it processes the data through stored procedures. In other words, it does all the processing at the Server where the database resides. The remote terminal has a live connection to the Server, so if the Server goes down, employees will not be able to clock in or out until the Server connection is restored.

Setting Up a Remote Terminal

To set up a remote terminal you will need the following:

- One or more Time Clock Remote hardware clocking stations
- G.Neil Remote Terminal Program
- Optima Time Clock Program
- Static IP Address

The Remote Terminal Program allows you to enter an IP Address of the Remote Terminal.

You can set up the remote terminal anywhere you can setup a connection to the network.

Setting the IP Address on a remote terminal

1. Have your Network Administrator set up a static IP Address for each remote terminal you plan to implement. NOTE: G.Neil Tech Support cannot assist in setting this up.
2. Connect the Remote Terminal to your network through an Ethernet cable

Time Clock Ethernet Terminal

Time Clock Ethernet Terminals are small, low cost data collection devices that communicate with Optima Time Clock over a TCP/IP network. The network interface supports both 10BaseT and 100BaseT Ethernet connections. The operator interface consists of an LCD display and membrane switch keypad with additional operator input options for barcode, mag-stripe, and auxiliary RS-232 serial port.

Theory of Operation

When the Time Clock Remote terminal is connected to an Ethernet network it functions similar to a "dumb" terminal. The host software can send commands and displayable messages to the terminal via the network. User input is entered at the keypad or mag-stripe reader and is sent to the host software. To minimize network traffic, the user input is transferred as complete strings instead of character by character. Strings are terminated by the "Enter" key and terminated with the ASCII <CR> & <LF> characters. The mag-stripe input automatically includes the "Enter" function.

Terminal Emulation

The ET214 terminal has two (2) emulation modes, the "Virtual Terminal Command" (VTC) mode and the "ANSI Emulation Mode". The VTC mode provides a unique but simple protocol that eliminates the need to know all the particulars of the lower level ANSI protocol. The ANSI emulation mode is a subset of the standard ANSI terminal protocol that supports most of the standard display manipulation command set. For more information on these emulation modes see the "Software Interface" section.

Network Interface

The Time Clock Remote terminal connects to a 10BaseT or 100BaseT hub via a standard RJ-45 Ethernet cable. From a network perspective, it occupies a single "socket" at a specified TCP/IP address and port number. The device must be configured with a unique IP address, net mask, and port number BEFORE it is installed on the network (see "Network Configuration Mode"). The host software communicates with the terminal by establishing a connection with the terminal and then sending and receiving ASCII text command strings.

Operator Interface

The Time Clock Remote includes an LCD display and a numeric keypad as the primary operator console interface. In addition, the terminal may include optional barcode and/or mag-stripe input readers and an auxilliary RS-232 serial port for connection of a serial input device.

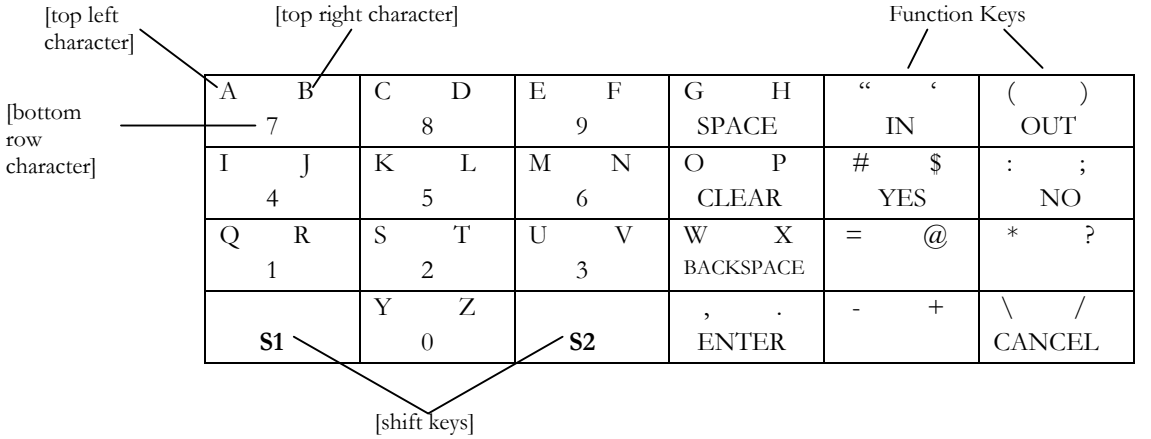
Display

The Time Clock Remote display is a two (2) line by twenty four (24) column LCD character display. It can display the 96 standard ASCII characters and 96 non-standard symbols in a 5 x 7 dot matrix font. The cursor position is identified by a blinking box and can be positioned under software control. A display backlight is available as an option for low light installations.

Keypad

The Time Clock Remote operator keyboard consists of a four (4) row by six (6) column membrane switch keypad. Two (2) shift keys **("S1"** & **"S2**") are provided to generate upper case alpha characters and several special characters. The keypad also includes "IN" and "OUT" keys for manually clocking in/out and "YES" and "NO" keys for answering program questions.

Default Alpha/Numeric Mode



The shift keys **("S1"** & **"S2"**) are used to expand the number of ASCII characters that can be generated by the keypad. Holding down a shift key and pressing one of the other 22 keys generates an alternate ASCII character. For example, holding down **"S2"** and pressing the **"7"** key generates the ASCII "B" code. In addition, holding down both shift keys and pressing a function key results in a special local terminal function. The following table shows the assigned local terminal functions.

Key Combination	Local Function
Pressing Bottom Row Character	Enters the bottom character. For example, pressing "7" enters the number "7" on the keypad.
S1 & [top left character]	Enters the top left character. For example, pressing "S1" & "A" enters the letter "A" on the keypad.
S2 & [top right character]	Enters the top left character. For example, pressing "S2" & "B" enters the letter "B" on the keypad.
S1 & S2 + IN	Enter Network Configuration Mode
S1 & S2 + OUT	Enter Configuration Mode
S1 & S2 + Cancel	Reboot Terminal – Reboot requires reconnecting through the TC Remote program

Setup & Configuration

It is strongly recommended that you read these instructions on setting up and configuring the Time Clock Remote terminal BEFORE attempting to install it.

The Time Clock Remote terminal must be configured for Optima Time Clock BEFORE it can be installed and used on the network. Configuration parameters can be modified through the operator console and are saved in non-volatile memory. Network communication parameters are entered with the "Network Configuration Mode" and the console parameters are modified with the "Console Configuration Mode".

Configuring the Time Clock Remote terminal is done in three steps:

1. Configuring the Network Configuration.
2. Configuring the Console Configuration.
3. Setting Up the TC Remote program.

Network Configuration Mode

The Network Configuration Mode is used to configure the Time Clock Remote communications parameters. These parameters must be set BEFORE the terminal is installed on the network. Holding down the "S1" & "S2" shift keys and pressing the "IN" key will start this mode. A menu will be displayed and pressing the "2" key will allow access to the network parameters. The display will present a series of configuration parameters and their current values. A value can be changed using the keypad and pressing the "Enter" key. After the last parameter is entered the values are saved in memory and the menu is display again. Exit from the "Network Configuration Mode" is accomplished by pressing the "Enter" key at the menu.

The following table summarizes the "Network Configuration Mode" parameters and the VTC command names used to change them. **NOTE:** Only the MYIP, NETMASK, and MODE parameters need to be configured to work with Optima Time Clock.

Name	Default Value	Description
MYIP	192.168.168.50	Defines the unique network address of this terminal. This value must be set BEFORE installing the device on a network. The default value may NOT be appropriate and a new address should be obtained from the network administrator.
NETMASK	255.255.255.0	Defines the network mask for the IP address. This value must be set BEFORE installing the device on a network. The default value may NOT be appropriate and a new value should be obtained from the network administrator.

Name	Default Value	Description
GATEWAY	0.0.0.0	Can be set to the address of a router or gateway if the network extends to multiple segments. This value must be set BEFORE installing the device on a network. The default value may NOT be appropriate and a new address should be obtained from the network administrator.
TCPPORT	1070	Defines the primary TCP/IP port number used for this terminal. This value must be set BEFORE installing the device on a network. In most cases, the default value will be acceptable. However, it may NOT be appropriate and a new port number should be obtained from the network administrator. It should be set to 23 for a "telnet terminal" application.
SERVER	0.0.0.0	Defines a TCP/IP address for a server application. This value must be set BEFORE installing the device on a network. Normally, this value is set to 0.0.0.0 which causes the terminal operate as a "server" and connects with a host computer running a "client" application. If this value is set to any other IP address the terminal will operate as a "client" and will attempt to automatically connect to a host computer "server" application.
AUXPORT	9600,0,8,1,1	Defines the communications format for the aux serial port. The parameter string consists of five (5) integer value fields and has the following format: Baud, parity, data bits, stop bits, xoff Where: Baud = standard baud rates in the range of 110 – 57600 Parity = 0 (none), 1 (even), 2 (odd) Data bits = 7 or 8 Stop bits = 1 or 2 Xoff = xon/xoff protocol (0=disable, 1=enable)
MODE	1	Defines terminal emulation mode. The two (2) valid emulation modes are as follows: 1 = VTC Mode (default) 2 = ANSI Mode (Optima setting)
MYMAC	0050C2163007	This command will return a 12 character hexadecimal string representing the Ethernet hardware address. It is read only and can not be used to change the hardware address.

Chapter 3:
Getting Started

This chapter will help you to get started quickly and provide references for other chapters.

Chapter Contents:

Before You Begin

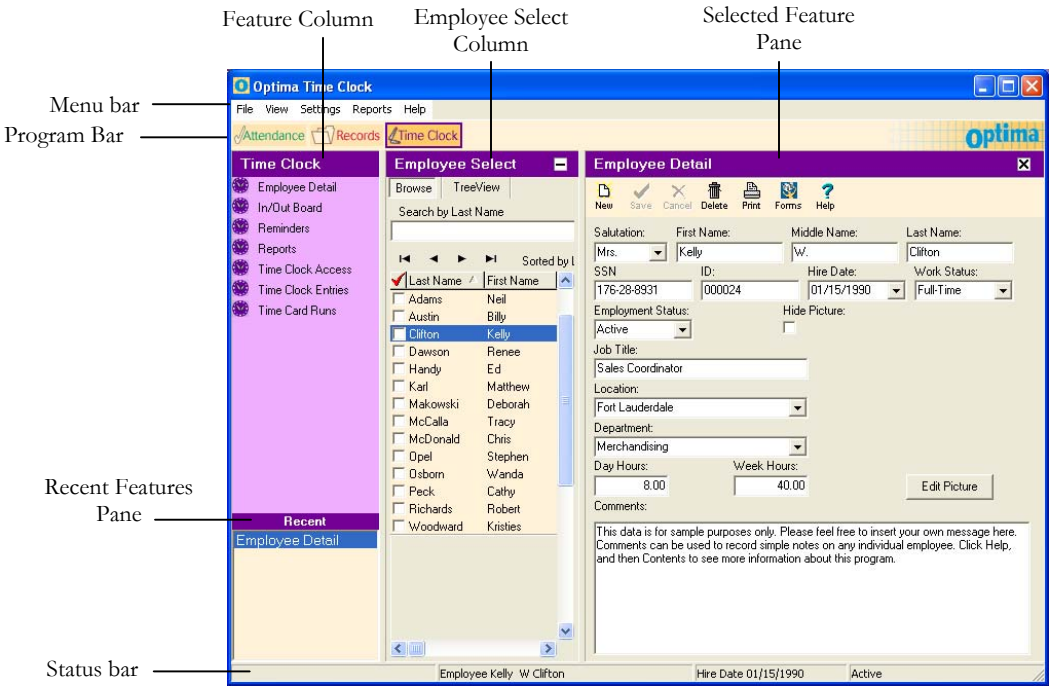
You should have the following information available:

- Location and Department names
- User Information (managers, supervisors, administrative assistants and others who will have access to the data)
- Employee Data (Employee Name, Hire Date, Work Status (full or part time), Active Status (Active, Inactive, or Terminated), Location and Department, Day Work Hours and Week Hours). You will need additional information about employee schedules, overtime and rounding rules, payroll categories and codes, etc., to fully set up Optima Time Clock.

Navigating the Management Windows

Optima Time Clock is now easier to navigate than ever before. Even better, if you have other Optima software installed, such as Optima Confidential Employee Record and Attendance Controller, you have access to all programs and features from one convenient interface.

The main parts of the Optima user interface are the Menu Bar, Program Bar, Feature Column, Employee Select Column, Selected Feature Pane and the Recent Features Pane.



Menu Bar

The menu bar includes the following options:

Menu	Description
File	**Maintenance** - **Backup Database** – Backs up the Optima database. **Export Time Clock Data** - **Import Data** – Imports basic data into the database. **Export Data** – Exports basic data from the database. **Delete** – Deletes current employee record. **Exit** – Closes program. [**Employee Name(s)**] – The last seven employees that have been entered or edited will show here for quick navigation back to their record.
View	**Filter Page** – This option allows you to filter by Active, Inactive, Terminated, Full and Part Time Status. **Open Reminders –** Shows open reminders that have not been resolved and whose date has not passed. **Checklist –** Shows the Checklist for getting started. **Welcome –** Shows the Welcome Screen.
Settings	**User Security** – This screen allows you to set up user access. **Global Preferences –** This feature allows you to set up settings that affect features within the program. **Guest Users –** This option is for users who want to set up access to the database using a third party tool, such as Crystal Reports. **Reason Codes –** This allows you to set specific reasons when entering paid time for an employee. **Locations Departments –** This feature allows you to create your locations and departments. **Messages –** These messages will be seen when employees clock in and out. **Work Schedules –** Work Schedules allows you to set rounding rules (grace period) for employees clocking in/out. **Time Difference –** If you have multiple sites in different time zones, this option will allow you to set the difference in time for each computer connected to the database.
Reports	There are 12 different reports from basic employee information to viewing time cards and tracking deleted time clock entries (See Chapter 10 – Using Reports). You may also customize a report to fit most needs through Custom Reports.

Menu	Description
Help	**Contents –** This brings up the Help File for Optima Time Clock. Note: Internet Explorer 4.x and above needs to be installed for this option to work. **System Information –** This gives you information about your computer, database path, and other information that is needed when speaking to G.Neil's Technical Support team. **About** – This shows the version number, type of license (Single User, five user, 10 user or Unlimited), and User Login Name. A link to the G.Neil Tech Support site is also located here. **Alter Current Product License –** This allows you to enter a new Product Key Code.

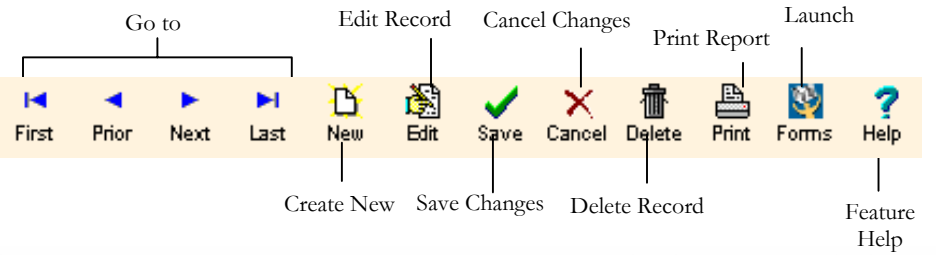
Feature Column

The Feature Column includes the following options:

Button	Description
Employee Detail	**Employee Detail** allows you to add new employees and edit employee information. This screen is shared between Optima Attendance Controller, Confidential Employee Record and Time Clock.
In / Out Board	**In/Out Board** allows you to view the clock in/out status of employees at a glance.
Reminders	**Reminders** allows you to view, edit and create reminders.
Time Clock Access	**Time Clock Access** allows you to set up employee access to clock in/out. You may give employee access to create, edit and/or delete their own time entries.
Time Clock Entries	**Time Clock Entries** allow you to maintain employee time entries. You may view, add, delete and edit time entries as needed.
Time Card Runs	**Time Card Runs** allow you to view, print or export time cards

Toolbar

The Toolbar contains buttons that allow navigation between feature records and allows editing of employee information.



Starting Optima Time Clock .....

Optima Time Clock consists of two applications: the main application - **Optima Time Clock Admin** - where administrative work is done, such as setting up logins, editing time cards and printing time card runs; and a separate application called the **Optima Time Station**, where your employees clock in and out.

NOTE: Separating the Admin and Time Station applications is new to Version 8. In the previous version of Time Clock you had to go through the clock in/out screen to log into the Admin application.

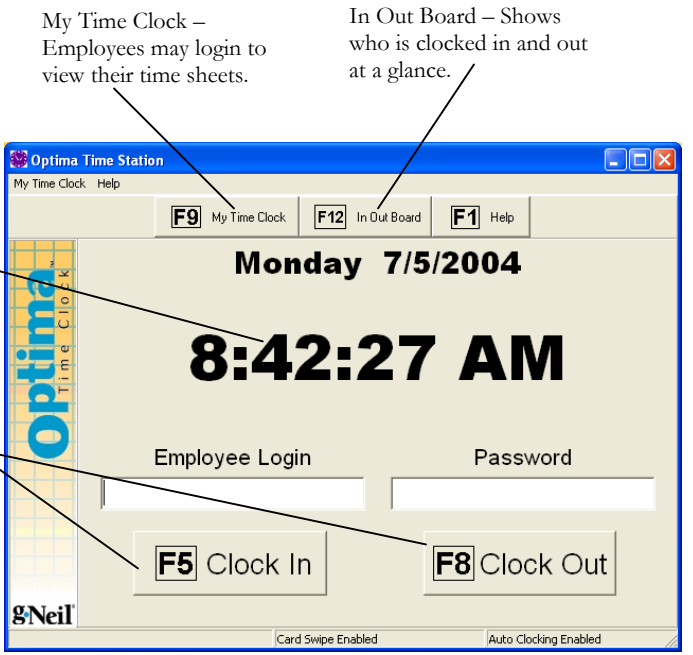
To start the Time Station, click **Start > Programs > GNeil > Optima Time Station** or double-click the program icon on the computer where your employees will clock in/out.

The Time Station is where your employees will clock in and out. Employees may clock in and out using the keyboard or swipe card with magnetic stripe reader or TC Remote Terminal.

Time Station

When installed on a Server, for security purposes, the date and time is pulled from the Server, and not from the Workstation.

Clock- in and -out using the keyboard at the employee's desk or by magnetic stripe card reader.



Opening The Management Screen

The Management screen allows you to view and edit employee time entries, run reports, and set program options. If you have the Optima Time Clock (full program) installed on the same computer where user can clock in / out, you will have the option to log into the management screen by clicking **Management > Management Login**. Or you may get to it by clicking **Start** > **Programs** > **G.Neil** > **Optima Time Clock**.

NOTE: A Management (Administrator) Login is different from an Employee Login. A Management Login allows access to set up screens, time card entries and reports; Employee Login only allows employees to clock in/out and manage their individual time entries.

The Welcome Screen

If you're going into the Management screen for the first time, the **Welcome** screen will appear. The **Welcome** screen gives you tips on getting started and the new features.

If you do not want this window to appear the next time you start Optima Time Clock, click **Don't show this message again** in the bottom left. To show this message at startup from within Optima Time Clock, choose **View > Welcome**. Click **Continue** to open the Management screen.

Logging into the Management screen

A user login is different from an employee login. An **employee login** (set under Time Clock Acess) will only have access to the **My Time Clock** feature and to clock in and out. A **user login** (set under User Security) will allow managers, supervisors, and other administrators access to setup and maintain Optima Time Clock.

Login and Password

If you're logging in for the first time, the default user login is **Admin**, and the default password is **Admin**. For security purposes, we highly recommend changing this password after you log into the Management screen.

Optima Time Clock Checklist

For first time users, the Optima Time Clock Checklist will appear. If you do not want this window to appear at startup, click **I am finished with the checklist**. To show this window from within Optima Time Clock, choose **View > Checklist**.

The Checklist shows in order the sections that you should complete to get up and running quickly.

- ❑ Change the Admin password by going to **Settings > User Security**. We highly recommend changing the Admin password even if there aren't other users. If needed, set up access for others who will need to help you set up the program. If you need to give access to specific locations and departments, or individual employees, set these up first and then come back to User Security and complete security access. (See Chapter 5 – **Setting Security Rights**.)
- ❑ Create Locations and Departments (See Chapter 3 – **Creating Locations & Departments** .)
- ❑ Set up Global Preferences. (See Chapter 3 – **Setting Up Global Preferences** .)
- ❑ Set up preferences (See Chapter 3 - **Setting Up Time Clock Preferences** .)
- ❑ Set up Reason Codes (See Chapter 3 - **Setting Up Reason Codes**
- ❑ Create Work Schedules (See Chapter 8 - **Creating and Editing Work Schedules**.)
- ❑ Add Employees (See Chapter 7 - **Adding a New Employee** .)
- ❑ Assign Time Clock Access (See Chapter 3 - **Assigning Time Clock Access** .)
- ❑ (Optional) Setting Up Optima for Time Zone Differences (See Chapter 3 - **Dealing with Time Zone Differences** .)

Changing the Admin Password .....

The Admin login and password allows access to all features within Optima. Changing the Admin password is quick and easy, and allows for greater security.

NOTE: The password should be one that you will easily remember but not easily guessed by those who know you. A combination of letters and numbers (no spaces or special characters) at least 8 characters long will make a good password.

To change the Admin password, follow these steps:

1. From within Optima, go to **Settings > User Security**.
2. Enter a new password in the Password block. Then enter the password once more in the Verify Password block.
3. Click Save.

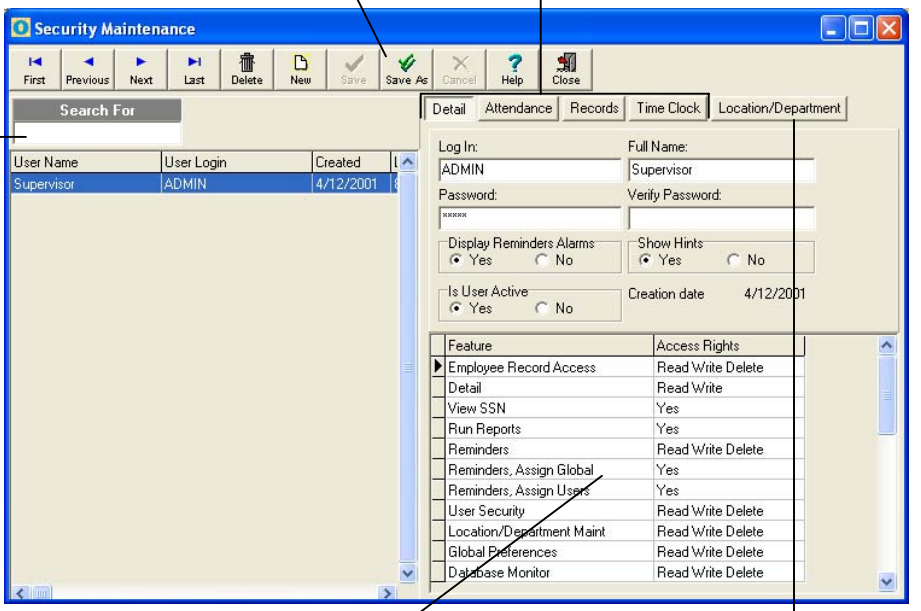
The next time you log in, you may use the new password.

User Security Screen

Save As – allows you to copy access rights from one user to another.

Detail, Attendance, Records and Time Clock – set access to specific program features.

Search For - allows searches by user



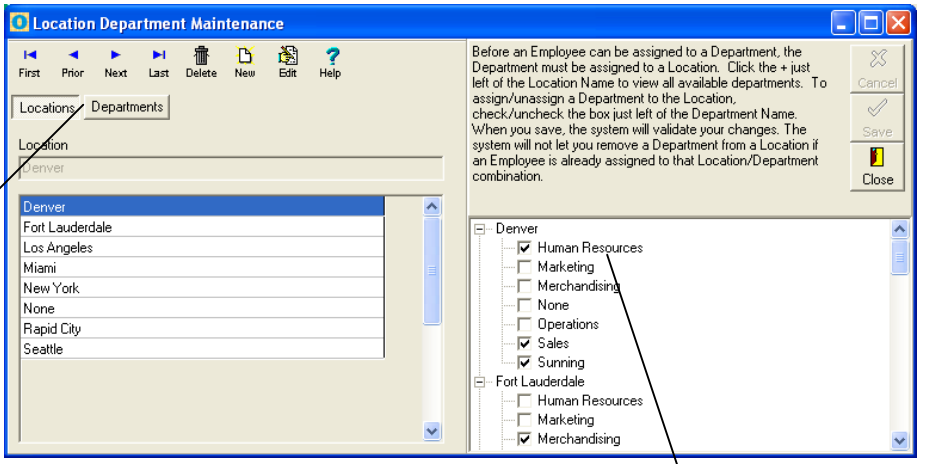
Feature/Access Rights – allows you to set access to each feature.

Location/Department – set access to location/department or employees.

Creating Locations & Departments .....

Locations and Departments are required and must be assigned to each of your Employees (See **Chapter 7 - Adding New Employees** to assign Location/Department to employees). Locations and departments allow you to sort your employees within a designated group. A **location** is considered a geographic place or group name, such as a Chicago or East Coast. A **department** is considered a specialized division or group name under the location, such as Sales or Merchandising.

Location / Department screen



Location and Department set up

Assign departments to each location. Only those departments selected will show up under that location on the drop down menu.

NOTE: Departments are assigned to Locations. When setting up Locations and Departments for the first time, a Location must be set up FIRST, and then you may assign a Department to that Location.

Setting up Locations and Departments

To create your Locations and Departments, follow these steps:

1. Click on **Locations and Departments** from the **Settings** menu.
2. Click **Locations**, then click **New**.
3. Enter the Location name.
4. Click **Save**.
5. Click **New** again to create other Locations as needed.
6. Click the **Departments**, then click **New**.
7. Enter the Department name.
8. Click **Save**.
9. Click **New** again to create other Departments as needed.
10. After all locations and departments are created, click the **+** sign next to Location in the right pane.
11. Assign departments to a location by clicking in the box next to the department.

NOTE: As you add more locations and departments, you'll see that each location has ALL of the departments that you've created. However, only those departments that you assign to a location will show up when selecting them on other screens. You may not remove a Department from a Location if an Employee is still assigned to that Location/Department combination.

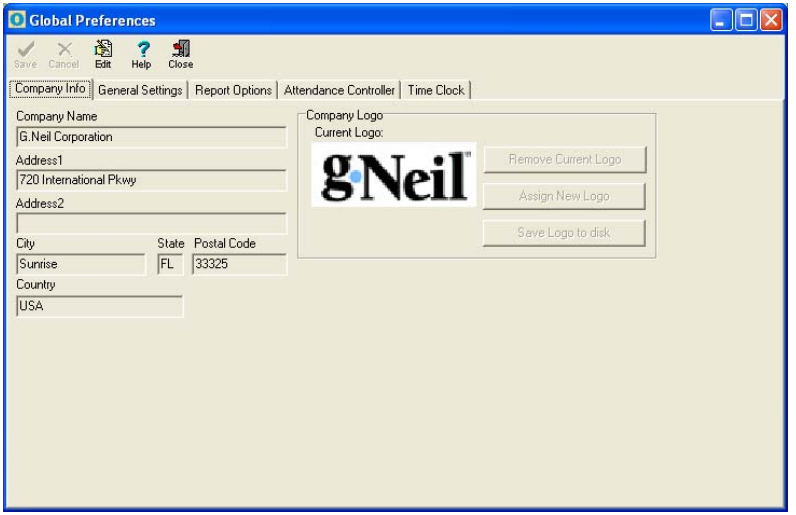
Setting Up Global Preferences .....

Global Preferences allows you to control your default program settings, such as Company Info, Report Options, and specific program options.

Before editing any of the Global Settings, you must first click the EDIT button. See below for detailed information on each tab.

Company Info Tab

Global Preferences
- Company Info Tab



The Company Information screen allows you to enter your company name, address and logo. We recommend entering the company name and logo as these will print out on Reports.

Feature	Description
Company Name	(Recommended) This will display on the report heading.
Address, City, State, Zip and County	(Optional)
Remove Current Logo	This allows you to unselect the current logo.
Assign New Logo	This allows you to select a new logo. This logo will display on the top left of reports.
Save Logo to disk	This allows you to save the current logo to disk or to your hard drive.

Editing Company Info

Follow these instructions to edit the company info:

1. After clicking on Settings, Global Preferences click Edit.
2. Enter Information as needed.
3. Click Save.

Adding a Company Logo

If you have your company logo available in a bitmap (. bmp) or jpeg (.jpg) file format, you can have this logo appear on reports. Optima supports .bmp and .jpg file formats not to exceed 200x200 pixels in size. The logo will appear in the top left when you print a report.

To add a company logo, follow these steps:

1. Click Assign New Logo.
2. Navigate to the directory where the company logo is located. It can be in a .bmp or .jpg format no bigger than 200x200 pixels in size.
3. Click on the logo and then click on Open to select it.
4. Click the Save button.

Saving Logo to Disk

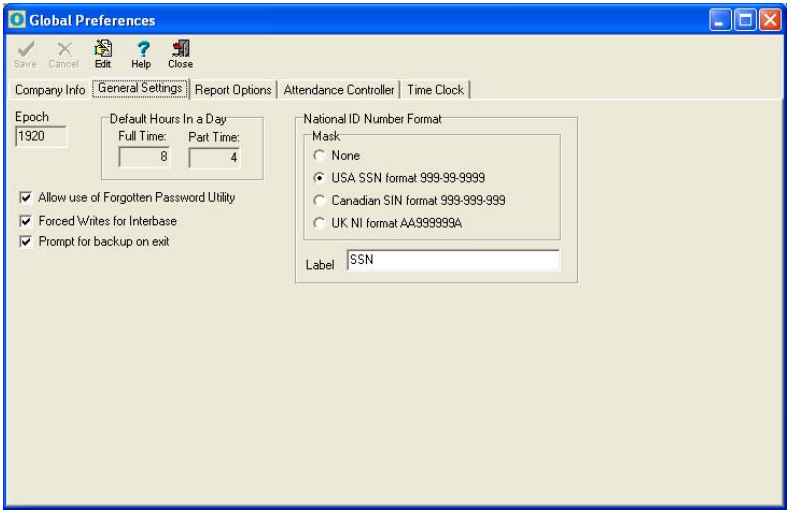
You may save the logo to a directory on a disk or hard drive. When you add a logo within Optima, the logo is actually saved within the database file.

General Settings Tab

The General Settings screen allows you to enter the default hours in a day that employees will be assigned and allows use of the Forgotten Password Utility. This screen also allows settings for Forced Writes to Interbase and prompting to backup on exit.

Feature	Description
Epoch Setting	We strongly recommend keeping the default settings. This setting will allow the Optima program to appropriately interpret any two-digit year entered that is between 1920 and 2019. For example, with the default Epoch setting of 1920: 1. If you enter a date (such as in the Hire Date field) of 03/05/01, the program will interpret this as 03/05/2001. 2. If you enter a date of 03/05/18, the program will interpret this as 03/05/1918. **Note:** If you need to enter a year prior to 1920 or after 2019 in a date field within the program, you may enter the year as a four-digit number.
Default Hours in a Day	These are the default hours that will be assigned when creating a new employee. The Day Hours on the Employee Detail screen will be filled in automatically with these default hours when a new employee is created.
National ID Number Format /Label	Selecting one of these options will allow you to set the mask for the National ID Number Format. The default mask is set to the USA SSN format. With this selected, whenever you enter a new employee, the dashes will automatically come up in the xxx-xx-xxxx format. The label is the title that will appear on the Employee Detail screen.

Global Preferences –
General Settings Tab

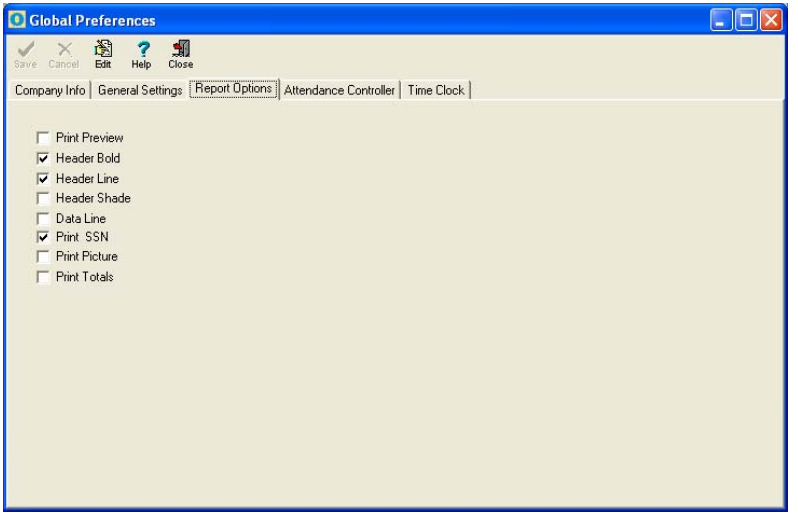


Feature	Description
Allow use of Forgotten Password Utility	This option allows access to a utility that can be used, only with assistance from G.Neil Tech Support, to gain access into the Optima program. In order to use this feature, we require that a statement on a company letterhead and signed by a supervisor, be sent by fax or mail stating that the user is allowed full access into the program. We keep statements on file. Call G.Neil Tech Support if you have forgotten or lost your Optima password.
Forced Writes for Interbase	• If running the Optima database on a Standalone computer, this option will help to keep the database more stable. A Workstation is more prone to lock up or crash than a Server. If the Optima database is installed on a Workstation and the program is open at the time the computer locks up or crashes, the database is prone to becoming corrupt and possibly unrepairable. A computer lockup or crash can be attributed to several things, including having too many programs open at the same time than what your computer memory can handle. • If the database is installed on a Workstation or Standalone computer, we recommend keeping this option checked. The performance may lag a little, but unless you have more than 800 employees, you may not even notice it. We also recommend having a current backup, created within Optima or DB Monitor, available. If the database is installed on a Server, normally a backup of the whole Server is created on a daily or regular basis. We still recommend setting up Scheduled backups within DB Monitor, but having this option checked is not as important on a Server.
Prompt for backup on Exit	This option allows you to turn on or off the message prompting for backup when you close out of the program. Backups are very important. We recommend that you turn this feature off only if you have scheduled backups within the DB Monitor.

Report Options Tab

The Report Options settings affect how reports will appear by default.

Global Preferences – Report Options Tab



Feature	Description
Print Preview	Toggles (turns on and off) showing preview first before printing.
Header Bold	Toggles bolding for Header Title
Header Line	Toggles putting a line under the Header Title
Header Shade	Toggles shading for Location or Department title row
Data Line	Toggles lines to separate data information
Print SSN	Toggles ability to show Social Security Numbers
Print Picture	Toggles ability to print Picture on printout
Print Totals	Toggles whether or not Totals show up on reports

Editing Report Options

To Edit Report Options, follow these steps:

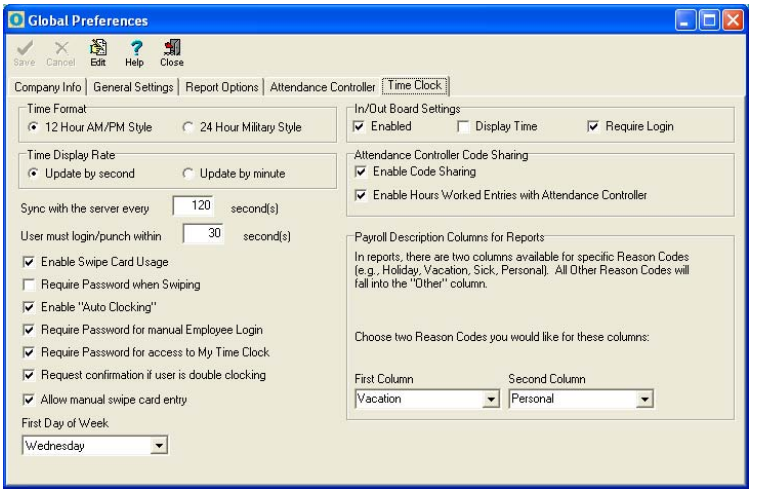
1. Click EDIT.
2. Choose an option by clicking in the box.
3. Click Save.

Attendance Controller Tab

The Attendance Controller Tab will only show if Attendance Controller is installed. Please see the Optima Attendance Controller manual for more details on this feature.

Setting Up Time Clock Preferences

Global Preferences – Time Clock Tab



The Time Clock Tab allows you to set global settings for Optima Time Clock. This will also allow you to enable Attendance Controller and Time Clock code sharing.

Feature	Description
Time Format	This allows you to set the time to display in military style or 12-hour style.
In/Out Board Settings	a. **Enabled** – This allows the user to view the In/Out Board from the main screen. b. **Display Time** – This will show the clock in/out time for the employee. c. **Require Login** – This causes the In/Out Board to require a login and password.
Time Display Rate	This causes the main clock to be viewed in seconds or minutes.
Attendance Controller Code Sharing **(See Chapter 4:** Setting Up Attendance Controller Code Sharing **for detailed information.)**	If you have Optima Attendance Controller installed, the following options will be available: a. **Enable Code Sharing** - This will allow hours worked and paid time off codes to be shared between Optima Attendance Controller and Time Clock. For example, if a code "V" for Paid Vacation of 8 hours is entered on the Calendar in Optima Attendance Controller, this time will also be entered into Optima Time Clock as a manual time entry of 8 hours.

Feature	Description
Attendance Controller Code Sharing (Cont.)	b. **Enable Hours Worked Transactions Relation** - (**Enable Code Sharing** must be checked for this option to be available.) This allows the "W" code (Hours Worked) entry in Optima Attendance Controller to be entered as a manual time entry in Optima Time Clock. c. **Reported Payroll Description Columns** - Reason Code = Payroll Code Description = Related Attendance Controller Absence Code. **Note:** Reason Codes and Payroll Code Descriptions must be set up before assigning the Reported Payroll Description Columns. (See **Chapter 3** - Setting Up Reason Codes .)
Sync with the server every 120 second(s)	This is how often the client will synchronize the main clock with the server.
User must login/punch within 30 second(s)	Once a user enters the first character into the login screen, a countdown timer starts. If a user doesn't finish entering his or her login and password within the allotted time, the screen will reset the main clock screen.
Enable Swipe Card Usage	This allows you to enable the use of swipe cards. (Swipe cards and swipe card reader required.)
Require Password when Swiping	Users will be required to enter a password when swiping in.
Enable "Auto Clocking"	This enables the "smart" clocking feature. When users clock in the first time, the program clocks them **in**. The next time the user will be clocked **out** and so on. If 13 or more hours pass between punches, this feature will be reset and will take the next punch as an In punch.
Require Password for manual Employee Login	Users will be required to enter a password when clocking in/out.
Require Password for access to My Time Clock	Users will be required to enter a password when going into the My Time Clock feature.
Request confirmation if user is double clocking	Double clocking is defined as two In punches or two Out punches in a row. If a user tries to clock in/out twice in a row (within a 13-hour period), a message box will pop up asking for confirmation.

Setting Up Reason Codes

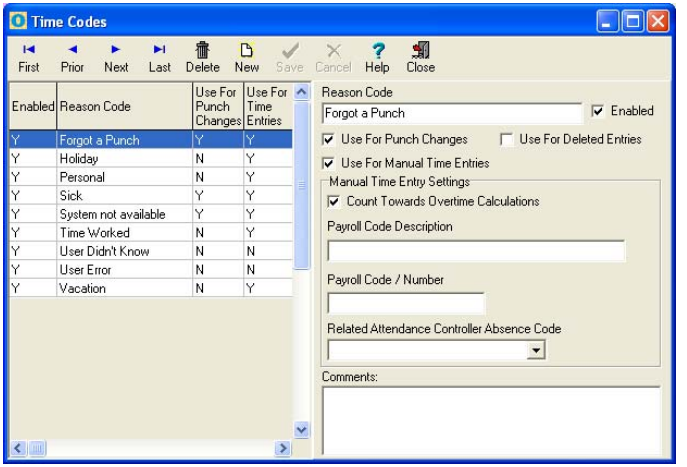
You may get to Reason codes by going to **Settings > Reason Codes**.

When you make a change to a punch entry, you are required to enter a reason for the change. All changes, such as deleting or editing a punch entry, are tracked and recorded. Reason Codes allow you to create these reasons customized for your company. There are different types of reasons:

Feature	Description
Use for Punch Changes	Reasons you would use when **making a change** to a punch. For example, you might enter a punch time for an employee because he or she forgot to punch in. (The reason would be Forgot to Punch.)
Use For Deleted Entries	Reasons you would use when **deleting** a punch or time entry. For example, you would delete a punch or time entry because someone punched in twice. (The reason would be User Error.)
Use For Time Entries (Manual Time Entries)	Reasons you would use when **entering** a manual time entry. For example, you may want to enter 8 hours of Paid Vacation for an employee. (The reason would be Paid Vacation.) This reason is also associated to Optima Attendance Controller, if code sharing is checked.

Typical reason codes could be Forgot a Punch, User Error, or Computer Down. For example, if the new employee, Josh, came in at 8:30 AM and forgot to clock in, Josh's supervisor would need to create a punch entry for 8:30 AM so that Josh gets credit for that time.

Reason Codes Screen



Feature	Description
Reason Code	This is the name of the reason (PTO, Sick, Personal, User Error, etc).
Enabled	When checked, this allows the reason code to show up when editing time on the Time Clock Entries screen.
Use for Punch Changes	These are Reason Codes that you want to see when you're doing a manual punch (Clock In or Out) change. A punch change changes or adds a specific punch in/out time entry. This is different from giving a full or partial day (see **Use for Time Entries** below).
Use for Deleted Changes	Whenever you delete an entry, you'll need to enter a reason. These are the Reason Codes that you want to show up when DELETING an entry.
Use for Time Entries	These are reasons that you only want to see when entering a manual time entry, such as Vacation, Personal, Sick, etc. A manual time entry is normally entered to give a full or partial day. For example, you might enter 4 or 8 hours of time for an employee that is on Vacation. This reason is different from giving a single entry for punching in or out for a specific time (see **Use for Punch Changes** above).
Count Towards Overtime Calculations	When checked, this setting tells Time Clock to count time under this Reason Code towards overtime.
Payroll Code Description	(Optional) Enter a Payroll Code Description. This description will show up on the Time Card Runs report. If a Payroll Code Description is not entered, time will be shown in the "Other" column on reports.
Payroll Code Number	(Optional) Enter your company's Payroll Code Number. This payroll code number will show up when exporting time card runs.
Related Attendance Controller Absence Code -This option will only be available if the Enable Code Sharing is checked (under **Global Preferences > Time Clock** Tab).	This allows an Absence Code from Optima Attendance Controller to be directly related to a Reason Code in Optima Time Clock. When an absence or time worked code is entered on the Attendance Controller Calendar, this entry will be entered in Time Clock according to the related Reason Code. Similarly, when you create a manual entry with a Reason Code in Time Clock, an Absence Code appears on the Attendance Controller calendar screen.

Creating a New Reason Code

To create a new reason, follow these steps:

1. Go to **Settings > Reason Codes**.
2. Click **New**.
3. Enter a reason for the following:
   a. Reasons you would use when making a change to a punch.
   b. Reasons you would use when deleting a punch or time entry.
   c. Reasons you would use when entering a manual time entry.

NOTE: You can select multiple uses for a reason code. For example, when using the reason code "Off Site," you may want to be able to select this when entering a punch change or when entering a full or partial amount of time.

4. Select Enabled. This will allow the reason to be selected when making changes.
5. Click Save.

Work Schedules .....

You may get to Work Schedules by going to **Settings > Work Schedules**.

There are some things in life that nobody has control over that may make an employee late for work. Many companies give a grace period to employees when punching in or out to cover these occasional events. Setting up a Work Schedule allows you to give a grace period from 2 to 60 minutes. You may run an Exceptions report to show if employees are abusing this right.

NOTE: If a Work Schedule is not set up or assigned, employees will be clocked in/out with no rounding or overtime rules. You will also not be able to run the Punch Exceptions Report.

Under Work Schedules, you may also set up overtime and punch schedules and rules that govern how to handle shifts that go over midnight into another day. You will need to set up your rounding rule (Work Schedule) and assign that rule to each employee. The most common rounding rules of 6, 10, and 15 minutes have already been set up for you.

To set up your rounding rules, go to the Settings menu, then Work Schedules. (See Chapter 8 – Create and Edit Work Schedules for detailed instructions on setting up Work Schedules.)

To assign a Work Schedule to an employee, go to the Time Clock Access Feature, then Current Work Schedule. (See Assigning Time Clock Access below.)

Printing Work Schedules

How-To

You may print all current Work Schedules by going to **Settings > Work Schedules** and clicking on the Printer icon.

Printing Employee Assigned Worked Schedules

To print the work schedules are assigned to employees, go to **Reports > Work Schedule Assignments**.

Adding Employees .....

Follow me

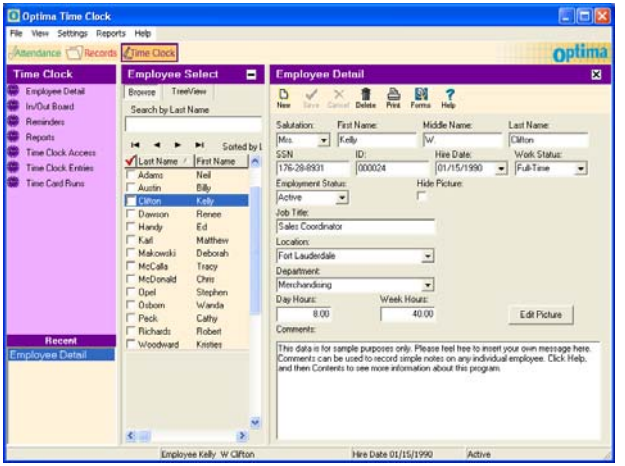
You may get to the Employee Detail Feature by selecting Employee Detail under the Feature Column.

All employees are entered through the Employee Detail screen. From here, you can enter their names, Social Security Numbers (optional), Hire Dates, Job Titles, and other pertinent information. This information is shared between Optima Attendance Controller, Confidential Employee Record and Time Clock. This means that when you enter this information in one program, you'll be able to see it in the other Optima programs.

Required Fields

The following fields are required: **First Name**, **Last Name**, **Hire Date**, **Work Status**, **Employment Status**, **Location**, **Department**, and **Day Hours. SSN** is not required in Optima, but may be required when exporting Time Card Runs for certain payroll programs.

Employee Detail screen



How-To

To add a new employee, click **New**. (See Required Fields above.) Click **Save** after entering employee information.

NOTE: Locations and departments must be set up before entering new employees. (See **Settings > Locations/Departments** to set these up.)

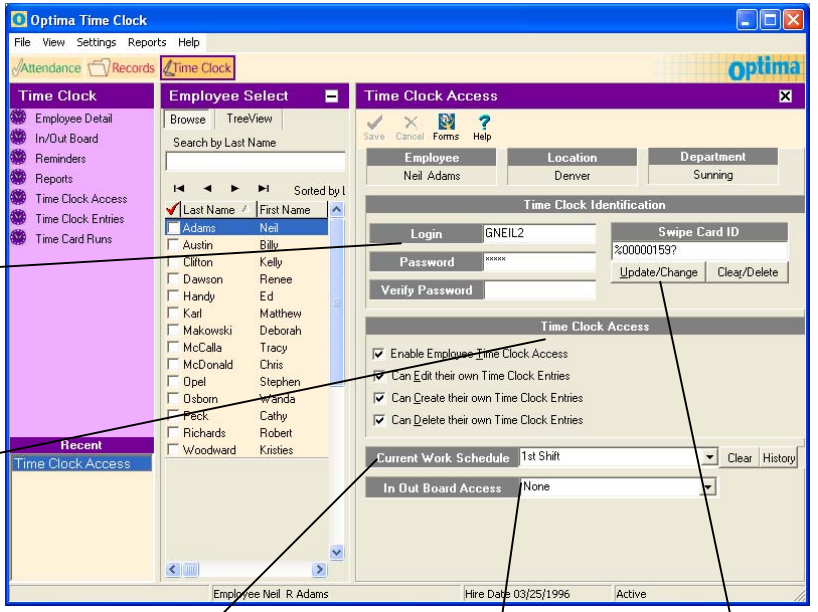
Assigning Time Clock Access

In order to allow employees to clock in and out, **Enable Employee Time Clock Access** will need to be checked under the **Time Clock Access** button. You may also give employees access rights to create, edit and/or delete their own time entries.

To assign access to an employee, follow these steps:

1. Select the employee that you want to allow to clock in/out by clicking on his or her name in the browse window.
2. Select the **Time Clock Access** button.
3. Enter a login name. The employee will use this to login to clock in/out and to gain access to the **My Time Clock** feature. **My Time Clock** allows employees to see their time entries.
4. Enter a password, and enter it again in the Verify Password block.

The Time Clock Access Feature



Employee Login and Password. This is what they will use to clock in and out with.

Time Clock Access - These settings allow employees to clock in/out, and to edit their time entries.

Current Work Schedule assigned for rounding rules.

In Out Board Access allows access to see all, none, or loc/dept on board.

Swipe Card ID allows use of magnetic stripe card with reader.

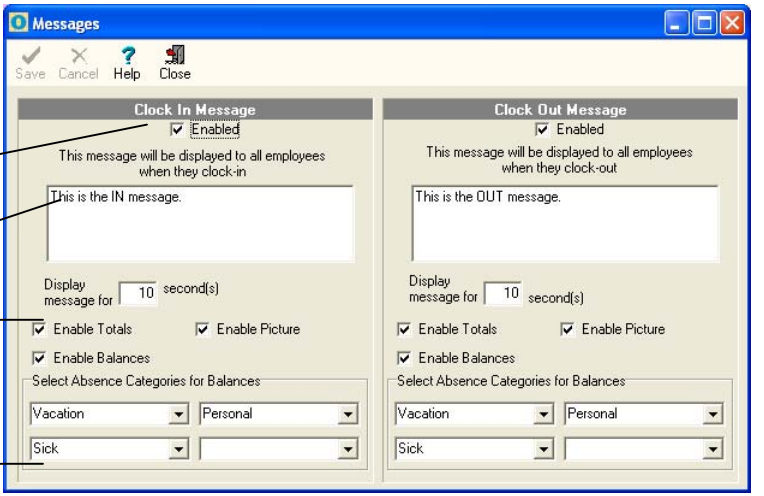
Creating Time Clock Messages

To get to the Time Clock Messages screen, go to **Settings > Messages**.

This screen allows you to enter messages that employees will see when they clock in or out. You may even set how long the message will stay on the screen.

To display a message, type your message in the message block for either Clock In or Clock Out Message, then click **Save**.

Time Clock Messages Screen



Enabled – This will show message when Clocking In/Out.

Message Block

Display message for __ second(s) – how long the message will stay on the screen.

Displays employee photo and balances when clocking in/out.

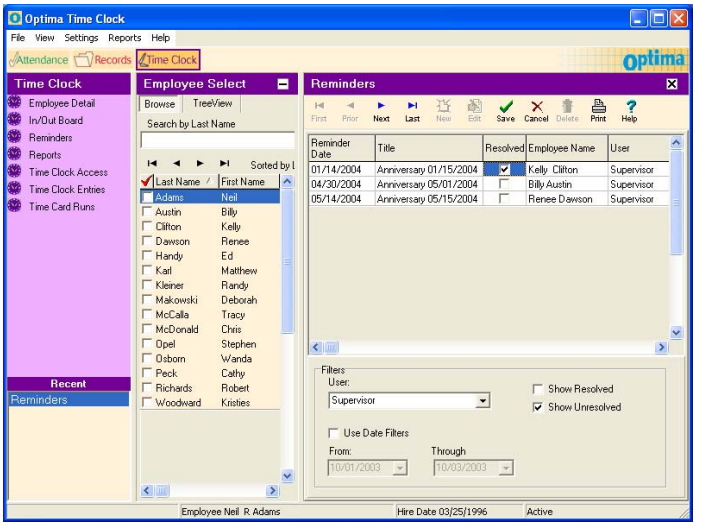
NOTE: The Clock In message will display whenever an employee clocks in, and the Clock Out message will display whenever an employee clocks out. For example, when an employee clocks in to begin the workday, the Clock In message will display. This same message will display when the employee clocks in from lunch.

Setting a Reminder

Go to **Time Clock > Reminders Feature**.

The Reminders feature will show you all open (unresolved) reminders and allow you to create, delete and resolve reminders. If you have created a reminder it will show up when you first open the program, starting on the reminder date. Reminders will continue to display until you click Resolve.

Reminder Screen



Reminders Tool Bar and Pane Layout

- **Tool Bar**

  First-Prior-Next-Last arrows – navigates through selected reminders
  New – Creates a new reminder
  Edit – Allows you to make changes to a reminder
  Save – Saves reminder
  Cancel – Cancels current changes
  Delete – Deletes selected reminder
  Print – Lets you print the Reminders report for selected employees
  Help – Brings up help for this screen

- **Pane Layout**

  Reminder Date – Date reminder should first display
  Title – Heading of reminder
  Resolved – Checkbox displays checked for resolved or unchecked for open (unresolved)
  Employee Name – Displays name of employee that reminder is associated with
  User – Displays name of user that reminder will display for
  Description – The purpose of the reminder shows here

- **Filters**

  User – Allows you to view reminders associated with specific users (must have access to Reminders, Assign Users under User Security)
  Show Resolved – Displays Resolved reminders only
  Show Unresolved – Displays Unresolved (open) reminders only

Creating a New Reminder

There are two types of reminders in Optima:

One Time Reminders – These are reminders that are only meant to remind you of a one-time event, such as filing an Absence Report at the end of the year.

Recurring Reminders – These remind you of the following recurring events:

Anniversaries (Optima Attendance Controller)

Birthdays, Performance Reviews, and I-9 Renewals (available if Optima Confidential Employee Record is also installed)

Setting a Reminder

One Time Reminder

1. Click on Reminders from the Features Column.
2. Click New.
3. Select (check) One Time Reminder.
4. Enter a Title and Reminder Date
5. If you want the reminder to be associated with specific employees, select the checkbox "Assign to all selected (checked) employees." This is optional and will create a separate reminder that is associated with each employee.
6. If you selected the checkbox in Step 5, you will need to select (check) any employees that this reminder is about in the Employee Select Column. Otherwise, skip to the next step.
7. By default, the User's name will default to the login that was used to enter the program. Change this if you want the reminder to come up for another user, or you may select Global which allows the reminder to come up for all users logging in. **Note**: You must have access to Reminders, Assign Users and Reminders, Assign Global under User Security to be able to change this option.
8. Enter a description of the reminder, if needed.
9. Click Save.

Recurring Reminder

1. To create a recurring reminder, follow these steps:
2. Select Reminders from the feature list.
3. Click New.
4. Select (check) Recurring Reminder.
5. Select the type of reminder: Anniversary, Birthday, Performance Review, or I-9 Renewal.
6. Select a Through Date (when do you want to stop the reminder from occurring).
7. Select how many days you want to be reminded before the event.
8. By default, the User's name will default to the login that was used to enter the program. Change this if you want the reminder to come up for another user, or you may select Global, which allows the reminder to come up for all users logging in.

Note: You must have access to Reminders, Assign Users and Reminders, Assign Global under User Security to be able to change this option.

9. Enter a description of the reminder, if needed.
10. Click Save.

Deleting Reminders

Reminders are deleted from the Main Reminders screen by clicking on the Delete icon.

Editing Reminders

There are two ways to edit reminders:

Main Reminders screen

From the main Reminders screen you can edit the following columns just by clicking in the field: Reminder Date, Title, Resolved and Description.

Edit Reminders screen

Clicking on Edit from the main Reminders screen will bring up the Edit Reminder screen. You may also double-click on the title of a reminder. The Edit Reminders screen allows you to change the Title, Reminder Date, User and Description.

Note: If you need to change the Employee Name that this reminder is about, you'll need to delete the reminder and then re-add it.

Open Reminders

Open reminders will appear for the user they are assigned unless the Global option is checked. If a reminder is marked with Global, then it will show for all users. You may view open reminders by opening the program or selecting Reminders from the feature list.

Note: If you have security access to "Reminders, Assign Users" (See Setting Security Rights, Chapter 5), you may view reminders set up by other users. You may also resolve reminders from the Open Reminders screen.

Features	Description
Topic	Brief Description of Reminder.
User	The reminder is assigned to the listed person. All users who have access to the program will appear on the list. Unless Global is checked, the reminder will only appear for the User the reminder is assigned to.
Reminder Date	This is the date the message will appear on the Open Reminders pop-up window upon entering the Manager's Login.

Features	Description
Employee drop-down box	This allows you to select the employee that the reminder is in reference to.
Status	This will automatically show the Status of the selected employee.
Global checkbox	This allows the reminder to be seen by anyone logging in.
Resolved Checkbox	This option should be selected when the reminder does not need to appear any longer on the Open Reminders window.
Sort Options	This allows you to sort the reminders by Date, Name, Topic, or User.
Filters	a. User – This allows you to view reminders of selected user. b. Display All Users – This allows you to view all reminders c. Show Resolved – This allows you to view only resolved reminders. d. Show Unresolved – This allows you to view only open reminders. e. Show Global Only – This allows you to view only reminders marked Global.
Comments	This allows you to view any comments relating to this reminder.

Printing Reminders

You may print reminders by going to **Reports > Reminders**.

Dealing with Time Zone Differences .....

If you have departments in different time zones that are connected to the same Optima database, you can set up Optima to account for the time differences. Without this feature, all punch times, whether in different time zones or not, will have the time of the Server where the database resides.

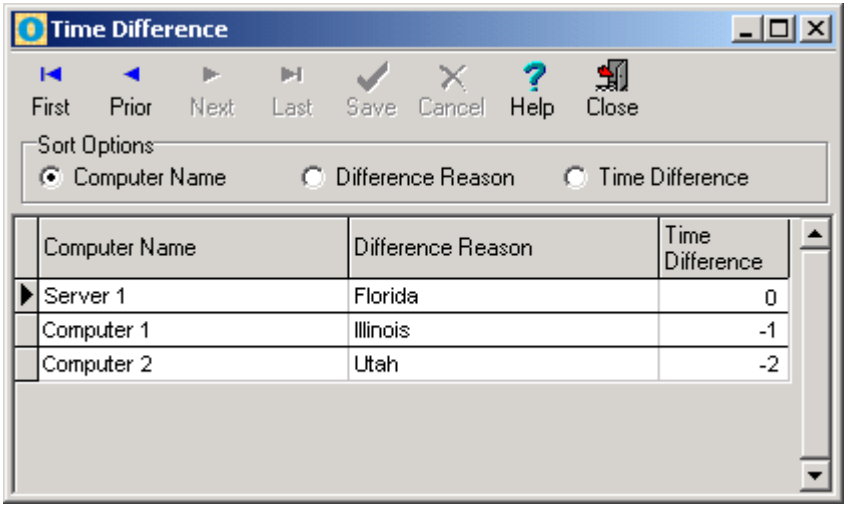
An example of using Time Difference: If the main server is in Florida, and someone clocks in from Utah (2 hours behind), the punch time would be recorded at Utah's time, like it should.

To get to Time Difference, go to **Settings > Time Difference.**

To set up computer time differences, follow these steps:

1. Have each computer open Optima Time Clock (and then exit) at least once before continuing. Each computer should be connected to the same database. They do not have to sign into the Manager's Section; just open Optima Time Clock to the first screen with the clock.
2. Setting the time difference should be done from the main server where the database resides. From **Settings > Time Difference**, you should see the name of each computer.

3. Enter a Difference Reason for each computer. The reason could be the department name, state or anything else to remind you where that computer is located. Computer names will not always be descriptive.
4. Enter the time difference. Enter time zones behind you with a number to include the minus sign.
5. Click Save.



Any punches from the different time zones will be clocked in at their respective times.

Chapter 4: Time Clock & Attendance Controller Code Sharing

This chapter explains code sharing between Optima Attendance Controller and Time Clock. This will also walk you through setting up code sharing between the two programs.

Chapter Contents:

Overview

Optima Time Clock and Optima Attendance Controller can be fully integrated. This means that absence codes (paid time off) entered in Attendance Controller are also automatically entered into Time Clock, such as Vacation.

Example: Linda takes a vacation day; her supervisor enters this time as a Vacation (Reason Code) in Optima Time Clock so that she is paid for that day. With Optima integration set up, this time will also show on the calendar in Attendance Controller as a V – Paid Vacation day.

Setting Up Attendance Controller Code Sharing

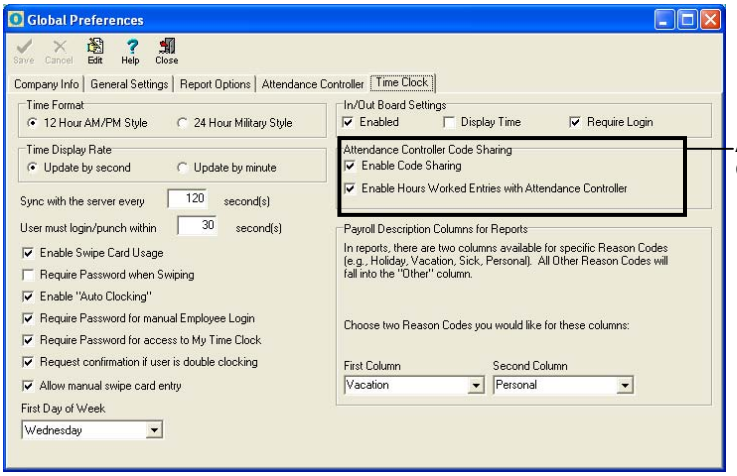
In order to set up Optima Time Clock and Optima Attendance Controller Code Sharing the following steps will need to be completed in the order listed:

1. Enable Attendance Controller Code Sharing
2. Set up Reason Codes
3. Set up Payroll Code Descriptions
4. Set up Related Attendance Controller Absence Codes

Enable Attendance Controller Code Sharing

The first step is to enable (turn on) the Attendance Controller integration. You would do this from **Settings > Global Preferences > Time Clock** Tab.

1. Under **Attendance Controller Code Sharing** on the Time Clock Tab, click **Enable Code Sharing**.
2. You may also select **Enable Hours Worked Transactions Relation** if you are going to enter Hours Worked (W Code) on the calendar in Attendance Controller. With this option selected, when a W Code is entered on the calendar screen the time will also be automatically entered in Time Clock.



Set Up Reason Codes (See Setting Up Reasons Codes in Chapter 3 for detailed information)

After turning on the Attendance Controller Code Sharing, the next step is to set up Reason Codes. You may already have Reason Codes set up; if so, go to the next step of setting up payroll code descriptions. Reason Codes allow you to select specific reasons when entering a manual time entry. Some examples of Reason Codes are: Vacation, Sick, Personal, Computer Down, Corrected Time Entry, etc.

Example: Using the example above where Linda takes a vacation day, when the supervisor enters a manual entry in Time Clock to record the time off, the time is entered as 8 hours and the reason code is Vacation.

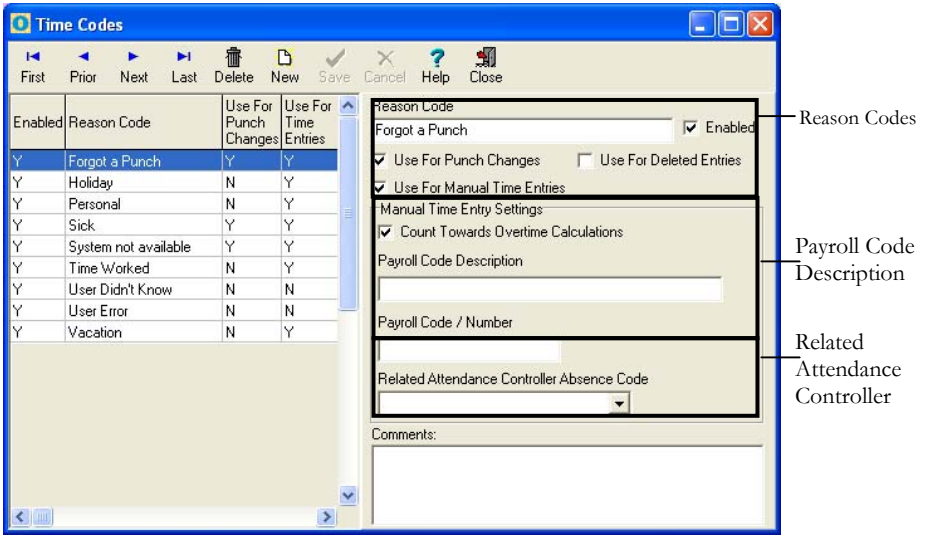
Feature	Description
Reason Codes	**Reason Codes** are required reasons when changing a punch entry or entering a manual entry.
Payroll Codes	**Payroll Codes** are descriptions that will show on reports and are related to Reason Codes and Absence Codes.
Related Attendance Controller Absence Codes	**Related Absence Codes** will allow absences that are entered on the Calendar screen to also be reported in Time Clock.

To set up Reason Codes, go to **Settings > Reason Codes**.

When entering a manual time entry, whether correcting an entry, or entering time for someone out on vacation, requires a reason. The three types of reasons are: Punch Changes (making a change to a punch time entry), Manual time entries (entering a time entry for 8 hours Vacation, etc.), and Deleted time entries.

The Reason Code window can be broken down into 3 parts: **Reason Code**, **Payroll Code Description**, and **Related Attendance Controller Absence Code**.

Reason Codes Screen



Set Up Payroll Code Descriptions and Numbers

(See Chapter 4 – Set Up Payroll Code Descriptions for detailed information.)

A Payroll Code Description is related to a Reason Code and Absence Code. The Payroll Code is the description that will show up on reports (such as the Time Card Runs report).

Example: A **Reason Code** of Vacation is set up. When someone takes a vacation day, a manual entry (from the Time Clock Entries screen) is created and given the Reason of Vacation. A **Payroll Code** Description of Paid Vacation is set up relating it to the **Reason Code** (Vacation). When a time card report is run it will show the Payroll Code Description of Paid Vacation (the Payroll Code is what will appear on reports). When that manual entry with the Vacation Reason Code is created, it will also create an entry on the Calendar in Optima Attendance Controller under the V- Paid Vacation absence code.

Set Up Payroll Description Columns for Reports

When running a report, such as the Time Card Runs report, only two payroll descriptions will show, along with Regular Hours and Overtime hours, due to space constraints. If there are any other payroll code descriptions, they will show up in the Other Column. The Time Card Runs (Extended) report will show all payroll descriptions in a column format.

After setting up the Payroll Code Descriptions, you'll be able to set up which two payroll codes you'll want to see, in addition to Regular Hours and Overtime Hours; time for all other payroll codes will be combined into the Other Column.

To set up the two Payroll Description Columns, follow these steps:

1. Go to **Settings > Global Preferences > Time Clock** Tab**. Payroll Description Columns for Reports**, locate **First Column** and **Second Column**.
2. Click on the drop-down arrow for **First Column** and select which payroll code you'll like to show up on the Time Card Runs report.
3. Then click on the drop-down arrow for **Second Column** and select another payroll code.
4. Click **Save**.
5. Close all the way out of the program and open it back up to refresh the data.

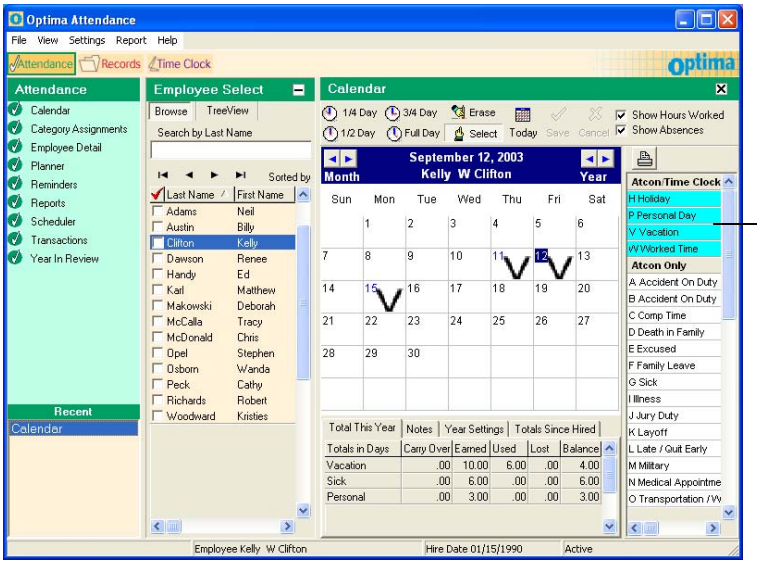
Set Up Attendance Controller Absence Codes

Once the Attendance Controller Integration is enabled, you'll be able to relate Reason Codes in Time Clock to Absence Codes in Attendance Controller. When you enter an Absence Code onto the Calendar that is related to a Reason Code, this will create an entry in Time Clock.

Example: We have a **Reason Code** of Vacation = **Payroll Code Description** of Paid Vacation **= Related Attendance Controller Absence Code** of V – Paid Vacation; when entering a **V** Code on the Calendar of 8 hours, this time will automatically be entered in Time Clock as 8 hours of **Vacation** (Reason Code). And this time will be shown on the Time Card Run report as 8 hours of **Paid Vacation** (Payroll Code Description).

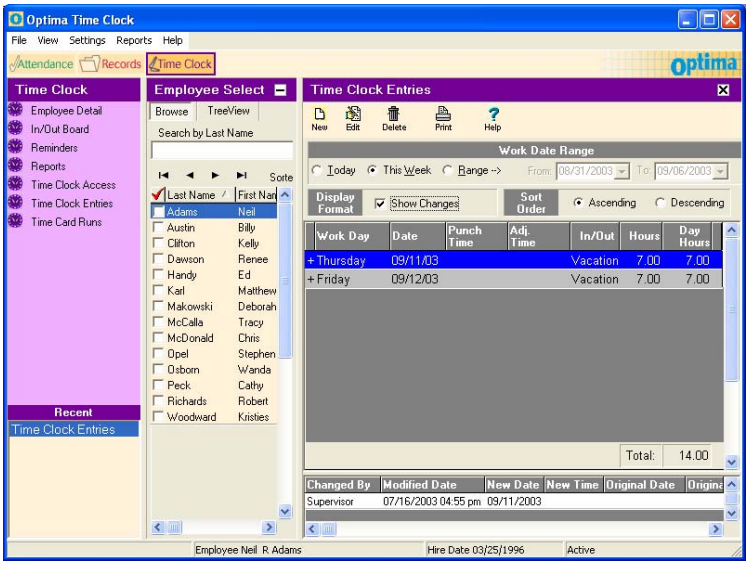
With code sharing set up, this is how it will work:

From the Calendar screen, we enter a **V – Paid Vacation** day (Related Absence Code) on June 5, 2002.

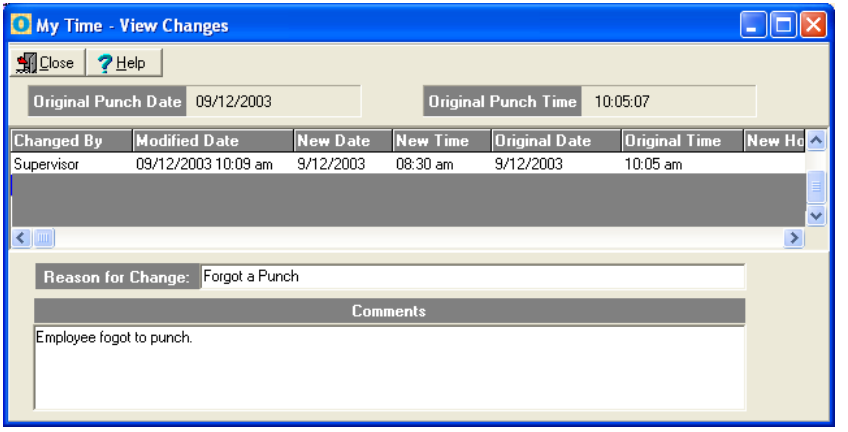


Related Absence Codes set up under **Settings > Reason Codes**.

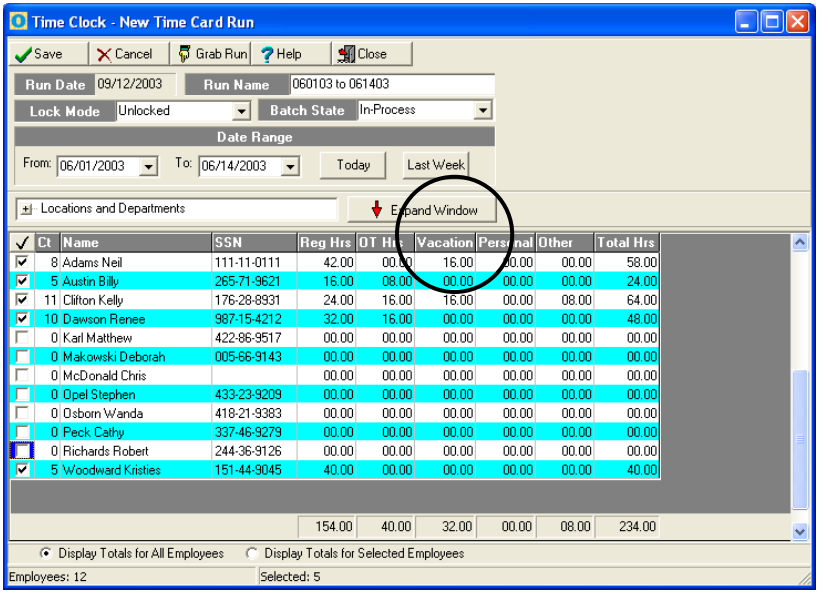
From the Time Clock Entries screen, we can see it reports the 7 hours as Paid Vacation (Payroll Code Description).



If we double-click on the Changed By Date at the bottom of the Time Clock Entries screen, we can see Vacation as the Reason for Change (Reason Code).



And we can see that it shows our columns of Paid Vacation (First Column) and Paid Personal (Second Column) with 16 hours Paid Vacation showing for Neil Adams.



And it will work the opposite way if we enter a manual entry in Time Clock, it will display in Attendance Controller.

Chapter 5: Setting Security Rights

Due to the confidential nature of information stored in Optima Time Clock, security is always turned on. This will help prevent unauthorized persons from accessing critical employee data. The use of security is required, and setting up access to Time Clock and any other G.Neil programs you have should be the second thing you do. The first thing you should do is set up Locations and Departments.

You may set up access for managers to view only their departments and/or view specific employees from other departments. You may also set up employees to have read-only access to their records.

Managers Access (User) Vs. Employee Access

There are two main levels of security to Optima Time Clock: Employee Level and Manager (or Administrator Level). An employee can be given access to clock in/out and even to create, edit, or delete his or her own time entries. Access for employees are given from **Time Clock Access**. Managers, Supervisors or Administrative Assistants are given user access through **User Security**. This allows managers to be given access to select features within the Time Clock management screens.

Chapter Contents:

Program Access

Go to **Settings > User Security**.

The program is set up with a default **Login** of: Admin and **Password** of: Admin. We strongly recommend changing the password for the Admin Login and set up other logins as necessary.

Setting up security access is necessary to allow other managers or supervisors access to the program. It is recommended that you do not give out the Login and Password to the Admin login but instead set up other user logins to access only those features that they will need. The Detail screen is the first screen that comes up when going into User Security. You'll need to set up access to the common Optima features (Detail Tab), the specific program features and locations and departments.

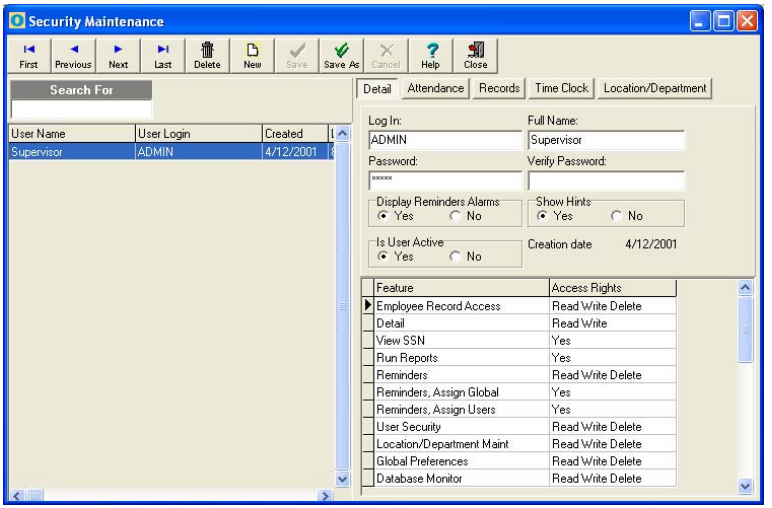
User Security

User Security for the Detail Tab

The Detail Tab has features that are common to the Optima programs. Common Features refer to features that are shared among Optima Attendance Controller, Confidential Employee Record and Time Clock. For example, the Detail Tab and Locations/Departments are common to all three programs. Even if you only have one of the listed programs you will need to follow these instructions to set up user access rights.

Search For	This allows searches by User Name.
Save As	This allows you to create new user log ins based on access rights of another user.

User Security Screen



The User Security window has the following features:

Feature*	Description
Employee Record Access	This allows access to view, add or delete employee records.
Detail	This allows access to the Detail Tab on the main screen.
View SSN	This allows access to view Social Security Numbers.
Run Reports	This allows access to run reports.
Reminders	This allows access to add and delete reminders.
Reminders, Assign Global	This allows access to assign reminders as Global.
Reminders, Assign Users	This allows access to assign reminders to other users.
User Security	This allows access to add, edit, and delete users and user access.
Location/Department Maint	This allows access to assign location/department access for users.
Global Preferences	This allows access to edit global preferences.
Database Monitor	This allows access to the DB Monitor.
Database Backup	This allows access to Backup from the DB Monitor.
Database Restore	This allows access to Restore from the DB Monitor.
Alter Product License	This allows access to change the Product License.
Conversion	This allows access to run the Conversion Utility.
Custom Reports	This allows access to create/edit customized reports.
Import	This allows access to import data.
Export	This allows access to export data.
Guest Users	This allows access to set up Guest Users to manipulate the data from another program, such as Crystal Reports.

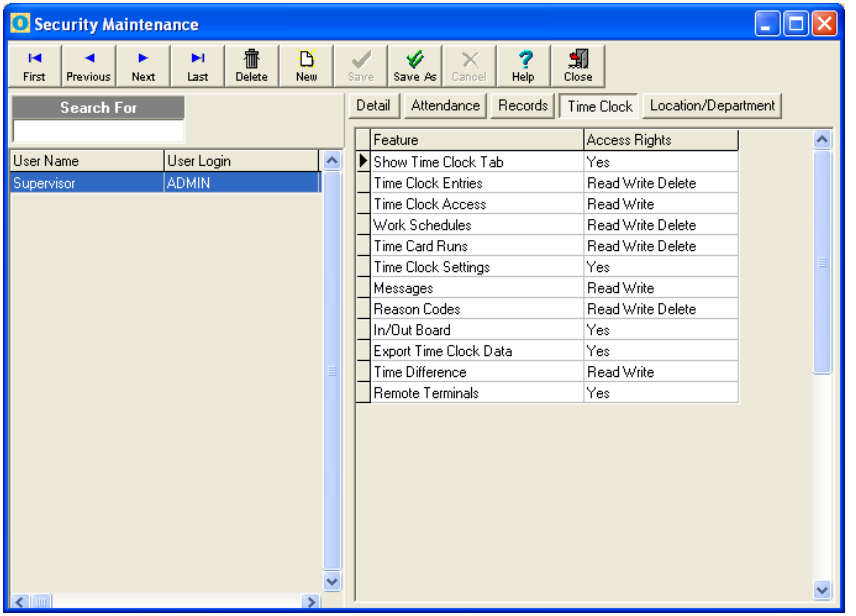
* The above features are shared between Optima Attendance Controller, Confidential Employee Record and Time Clock. This means that the Detail screen under User Security is the same screen in all three programs.

Time Clock Tab

Feature	Description
Time Clock Entries	This allows access to the Time Clock Entries screen.
Time Clock Access	This allows access to the Time Clock Access screen.
Work Schedules	This allows access to the Work Schedules screen. (See **Settings > Work Schedules**.)
Time Card Runs	This allows access to the Time Card Runs screen.

Feature	Description
Time Clock Settings	This allows access to the Time Clock Settings screen.
Messages	This allows access to the Time Clock Messages screen.
Time Codes	This allows access to the Time Codes screen.
In/Out Board	This allows access to the In/Out Board.
Export Data	This allows access to Export Data from the reports.

User Security – Time Clock Screen



Setting Up a User for Security Access .....

When setting up a new user, you'll need to make sure you set access rights under the User Security Detail Tab, Location/Department Tab and the appropriate program tab.

Setting up access to common features (**Detail tab**).

1. Click **New** from **User Security > Detail** screen.
2. Enter **Log In** and **Password** (letters and numbers only) and user's **Full Name**.
3. Select options for **Displaying Reminder Alarms** and **Hints** for this login.
4. Select **Yes** to allow the user to begin logging in after giving access. Setting this option to NO is a good security measure when users are out of the office for a number of days.
5. Select what type of Feature Access users will have by clicking in the Feature Access Rights block.
6. Clicking on the arrow will allow you to select from the following:

NO ACCESS – No access to selected feature
READ ONLY – This allows user to view only, he or she cannot make any changes
READ WRITE – This allows user to view, add, and edit; no deleting allowed
READ WRITE DELETE – This allows user full editing rights
YES – This allows access
NO – No access to feature

7. Click Save.

User Security Access for Locations/Departments

To set up access rights to Locations/Departments, follow these steps:

1. Select or create a Login following the steps under Setting Up Access Rights.
2. Click on Locations/Departments (Your Locations and Departments should already be set up at this point. If not, then please see Locations & Departments on setting them up before going any further).
3. If you want to give this Login full access to all locations, click in the box next to Locations/Departments so that the box is checked. This will allow a user with this Login to see all employees in all Locations and Departments.
4. If you want to give this Login access to only specific Locations, Departments or even down to employee level access, click on the + sign next to Locations/Departments to expand the view.
5. Click on the + sign next to the location and then on the + sign next to the department name. From here you may select specific employee's or click on the department name to choose all of the employees under that department.
6. Click Save.

You may click on a + sign at any time to collapse the view.

User Security for the Attendance Controller Tab

The Attendance Controller Tab will only be shown if Optima Attendance Controller is installed. Please see the Optima Attendance Controller manual's User Security section for more information.

User Security for the Confidential Employee Record tab

The Confidential Employee Record Tab will only be shown if Optima Confidential Employee Record is installed. Please see the Optima Confidential Employee Record manual's User Security section for more information.

User Security for the Locations/Departments Tab

You should have already created your Location and Department names (see Locations and Departments). Now you will want to set up users' access to the Locations and Departments by following these steps:

1. Click on Location/Department Tab from ***Settings***, ***User Security, Detail***.
2. Click on the "+" (plus sign) next to Locations/Departments and next to the location and department name to expand the list.
3. Click in the box next to the location and department name to select access to these areas. This will put a checkmark in the box. Click in the box again to unselect an area.
4. If you have already entered your employees in the program and assigned location and departments to them, when you expand a department, you will see all the employees assigned to that location/department combination. You may then select access to individual employees at this point by clicking in the box next to the employee.

NOTE: If you haven't entered your employees (see Employee Detail) into the program, you will still be able to assign access to a location/department combination, but not down to the employee level. You may later assign access down to the employee level after you enter your employees and assign a location/department to them.

5. Click Save.

Once you have followed the above steps, the user can log in with their login and password with their assigned access rights.

Tip: You may click **Save As** from the **User Security** screen if you already have a user with access rights you want to copy and give to another user. The selected user must be highlighted first.

Chapter 6: Clocking In/Out

There are two ways to clock in and out of Optima Time Clock, and both are described below. You can use a keyboard or a magnetic swipe card using a card reader. Optima Time Clock may be installed on one or two central computers or on all of your employees' computers so they may clock in/out from their desk.

Note: Employees use the Optima Time Station to clock in/out while managers and supervisors use the Optima Time Clock Admin portion of the program to manage employee time.

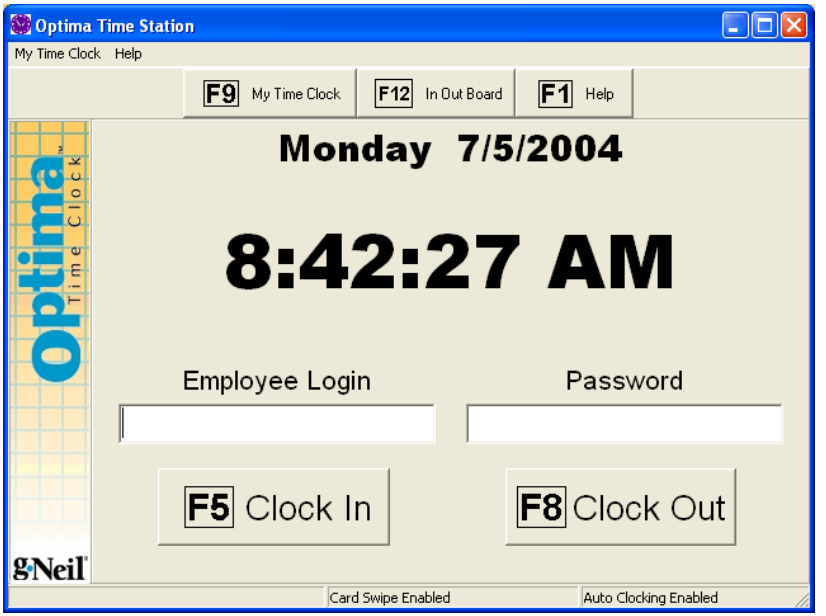
Chapter Contents:

Overview

We have made clocking in/out as easy as possible. Employees clock in and out from the Optima Time Station application. Employees may clock in using the keyboard or using a magnetic stripe card (swipe card) and card reader.

Using a swipe card and card reader allows for faster clocking in/out, but may not always be cost effective. You may install Optima Time Station on your employee's computers and allow them to clock in/out from their desks. (See the Software License Agreement at the front of the manual.)

Time Station Clock In/Out Screen



Clocking In Using the Keyboard

Before being able to clock in and out, an employee must have Time Clock access. (See Assigning Time Clock Access in Chapter 3.) To clock in using the keyboard, employees would enter their logins and passwords and click on Clock In (F5) or Clock Out (F8).

Employees that are given time clock access also have access to the My Time Clock feature. My Time Clock allows employees to see their own time cards. If given the proper rights, employees may also create, edit and delete their own time entries within My Time Clock.

Clocking In Using Swipe Card and Card Reader .....

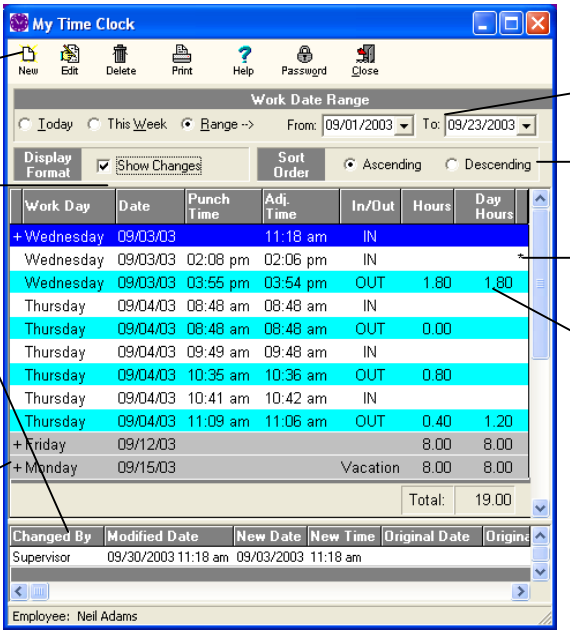
If you have a magnetic stripe card reader and cards, purchased separately, it will log employees in/out and allow them to get into **My Time Clock** without having to enter a login and password. (See page 11 for specifications on card and card reader.) As an added security feature, you may require that an employee enter a password, even while using a swipe card. This may cut down on an employee clocking in/out for another employee.

My Time Clock .....

My Time Clock allows employees to view their time card history, and, if given rights, can create, edit and delete their time card entries. An employee can log into **My Time Clock** by clicking on the **My Time Clock** button, or pressing the F9 key). The password for **My Time Clock** is the same one used when clocking in/out. (See **Time Clock Access** for setting up employee's login and password.)

Tip: Employees may log into **My Time Clock** using their swipe card at the **My Time Clock** login screen.

My Time Clock - Edit Screen



Toolbar

Date Range

Time Entries Sort Order

Show Changes made to time entries

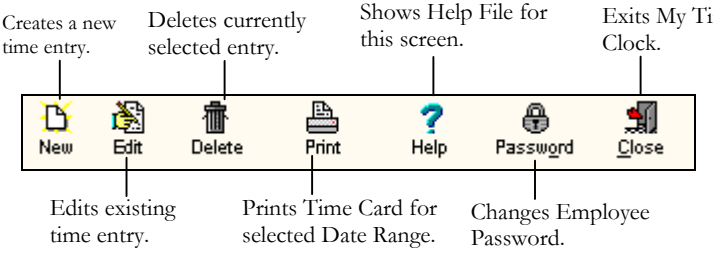
Asterisk (*) shows double entries of IN or OUT Punches

Punch Entries – Must have an IN and OUT Punch for total hours

Plus (+) sign denotes change has been made

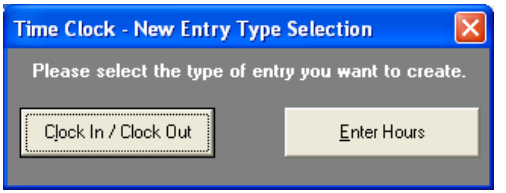
Employee Review/Edit toolbar

If given the proper rights, an employee may have access to New, Edit, and Delete. This will allow them to manage their own time cards. All changes and deletions are tracked and managers may run reports against these changes.



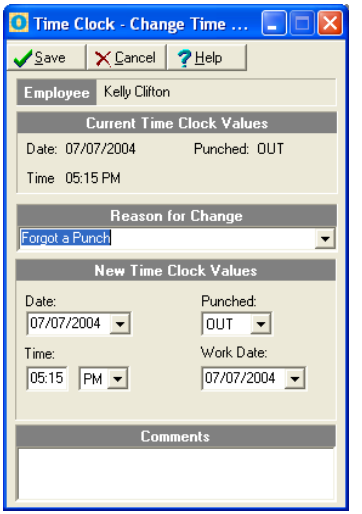
Creating a New Time Entry

You must be given rights to this feature. Clicking New, from the Time Clock Entries screen, will give you the **New Entry** window with the following options:



After clicking on New, you'll be given the choice of **Clock In / Clock Out** or **Enter Hours**.

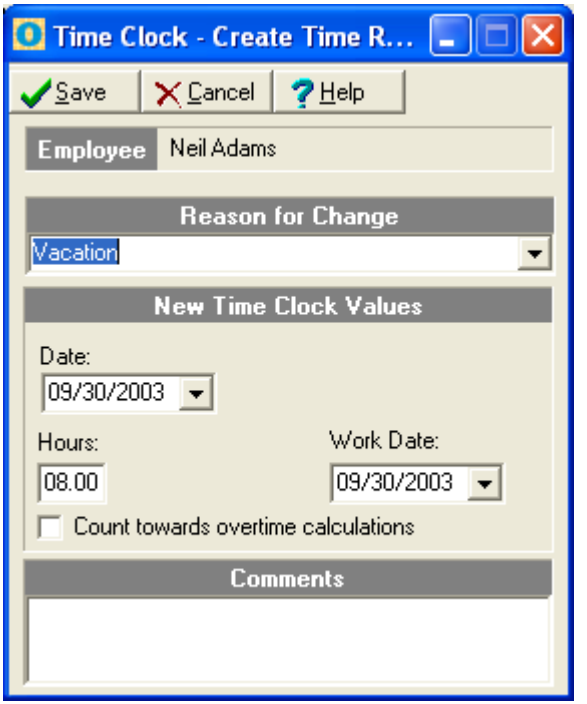
Selecting **Clock In/Clock Out** will allow you to enter a manual punch entry just as if an employee had clocked in or out. For example, you may enter a manual punch entry of 05:15 PM for a specific date.



Feature	Description
Reason for Change	A Reason is required for Creating a Manual Time Clock Entry or Entering Hours for a Date. (See **Settings > Reason Codes** in Administration screen.)
Date	This is the date of the punch entry.
Punched	This designates In or Out of the punch.
Time	This is the time of the punch entry.
Work Date	This is the Work Date that the punch refers to. (See Date Vs Work Date below for more info.)
Comments	Comments are not required but may be helpful when reading a reason at a later date.

Enter Hours

Selecting **Enter Hours** will allow you to give a set amount of hours for a given date. For example, you may enter a manual time entry of 8 hours Vacation.



Feature	Description
Reason for Change	A Reason is required for Creating a Manual Time Clock Entry or Entering Hours for a Date. (See **Settings > Reason Codes** in Administration screen.)

Feature	Description
Date	This is the date the employee will get credit for.
Work Date	This is the Work Date that the punch refers to. (See Date Vs Work Date below for more info.)
Hours	This allows you to enter specific hours for a date, such as 8 hours for a Vacation day. The Date, Hours and Reason for New Entry fields are required.
Count towards overtime calculations	Designates entry to count towards overtime.
Comments	Comments are not required but may be helpful when reading a reason at a later date.

Date Versus Work Date

When creating a new time entry, there are two date fields: Date and Work Date. The Work Date represents the date the entry is counted towards. Normally, you won't need to change the Work Date unless you have work shifts that cross over midnight. For example, Josh starts work and clocks in at 8 PM on Monday night. He gets off work at 4 AM on Tuesday morning, but forgets to clock out. A manual time entry is created for him punching him out at 4 AM; the Work Date is of the previous date (the actual date Josh started work). The program knew that Josh had clocked in at 8 PM the previous day and since he had not gone over 13 hours between punches it counted the OUT punch to the previous date.

Editing a Time Entry

Edit allows you to change an existing entry. You must be given rights to have this feature. Remember that the **Reason for Change** block is required and tracked. Editing a time entry is similar to creating a new entry except you only have the choice to change a punch time entry.

Deleting a Time Entry

Delete will erase the selected time entry and record the deletion. All changes and deletions are recorded and tracked. To view deleted time entries, go to Reports > Deleted Time Clock Entries.

Printing an Employee Time Card

Print allows you to print an employee time card for the selected date range.

Getting Help

Help allows you to bring up the help file for this screen.

Time Card Entries

The time card entries have the following coding:

Feature	Description
Blue band	A blue band designates the selected entry.
White band	A white band designates an IN punch.
Teal band (bluish green)	A teal band designates an OUT punch.
Gray band	A gray band designates a manual entry was given for a set amount of hours (see Enter Hours for a Date under New above). For example, Josh took 8 hours of Vacation on 3/15/2002 and a manual entry was entered for his time.
Plus (+) Sign	A plus (+) sign designates a punch was changed or manual entry was entered.
Asterisk (*)	An asterisk (*) designates that there is a double-punch; either two IN punches or two OUT punches together. Action should be taken on this type of entry of either adding a new entry or correcting an existing entry. Hours cannot be calculated for a double-punch entry.

CAUTION: If you see an asterisk (*) next to a time entry this means that some type of action should be taken, such as correcting a punch.

Work Day	Date	Punch Time	Adj. Time	In/Out	Hours	Day Hours
Monday	03/11/2002	09:06 am	09:10 am	IN		
Monday	03/11/2002	04:22 pm	04:30 pm	OUT	07.33	
Monday	03/11/2002	10:32 pm	10:30 pm	IN		
Monday	03/11/2002	11:34 pm	11:40 pm	OUT	01.17	
Monday	03/12/2002	01:35 am	01:30 am	IN		8.50 *
Tuesday	03/13/2002	01:37 am	01:40 am	IN		*
Tuesday	03/13/2002	09:51 am	10:00 am	OUT	08.33	8.33
+ Wednesday	03/14/2002	01:54 am	01:50 am	IN		
Wednesday	03/14/2002	09:58 am	10:00 am	OUT	08.17	8.17
+ Friday	03/15/2002				08.00	8.00

Plus sign (+) denotes manual entry was made

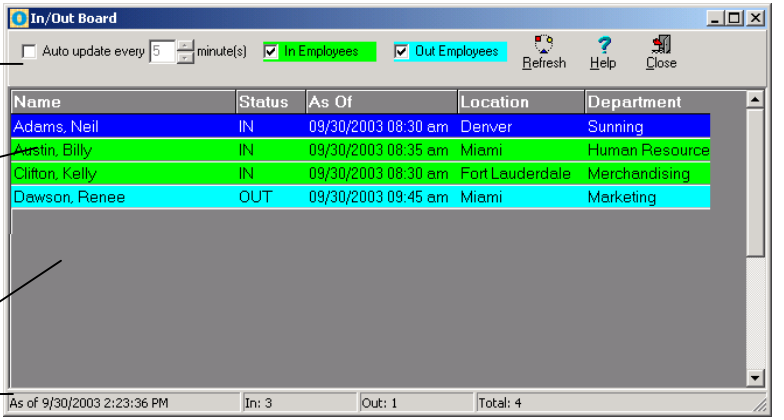
Asterisks (*) denote double entries

Tip: Right-clicking on an entry will show you the rounding rules (Work Schedule Rules) for that entry.

IN/OUT BOARD

The In/Out Board allows you to see, at a glance, employees who are in and out. The In/Out Board will refresh itself if the Auto Update feature is checked, otherwise, clicking the Refresh button will update the board.

In/Out Board Screen



In/Out Board Toolbar

Who's In, Who's Out

Status Bar

Feature	Description
Auto update every __ minute(s)	This allows you to set how often this board should update for you. **Note:** This is not a "live" board and will only be updated by the Auto Update or pressing Refresh.
In/Out Employees	This allows you to see employees who are In or Out at a glance.
Refresh	Clicking this button will refresh the list.
Help	This gives you help regarding the current screen.
Color-coding:	a. Green – denotes employees who are clocked IN. b. Teal (bluish-green) – denotes employees who are clocked OUT.

Administrators can have access to view all locations and departments or only specific locations and departments depending on their security access rights. Employees may be given access to all locations and departments or their specific location and/or department or no access to the In/Out Board. (See In/Out Board Access under Time Clock Access.

Chapter 7: Managing Employee Records

This chapter covers using Optima Time Clock for day-to-day operations.

Chapter Contents:

Overview

There are two main levels of security to Optima Time Clock: Employee Level and Manager (or Administrator Level).

Employee Level Access – This only allows access to Clock In/Out and access to the My Time Clock feature, which will allow individuals access to their time card histories. This also will allow them to create new time entries, edit existing entries, and/or delete their existing entries. Access to the In/Out Board may also be given. (See Chapter 3 - **Employee's Time Clock Access** for setting up access rights on page 45.) Setting up employee level access consists of setting up access on the Time Clock Access screen

Manager Level Access – This will allow managers access to selected employee time card entries. They may create, edit, and delete entries for these employees. They'll also have access to the In/Out Board. Managers at least may have access to everything or only a few Administration screens. Having one Manager Login that has access to everything is required. You may create other Manager Logins that have partial access to the Administration screens they need. For example, a payroll administrator may only need access to View/Edit Employee's Time Card Entries, Create & Edit Work Schedules and to Time Card Runs. The other screens would be set for No Access. (See User Security.)

Feature Column

The Feature Column allow you to navigate from screen to screen.

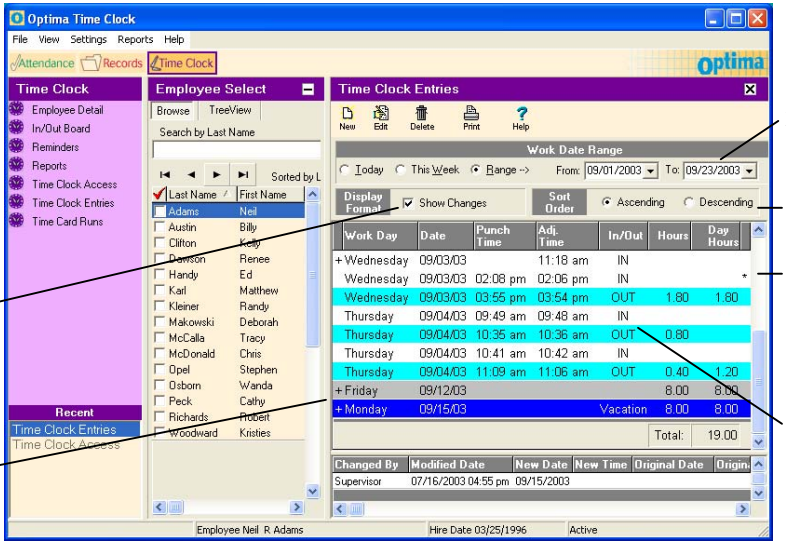
Feature	Description
Employee Detail	This screen allows you to enter and edit employee data.
In/Out Board	The In/Out Board allows you to see, at a glance, employees who are in and out.
Reminders	
Reports	
Time Clock Entries	This allows you to view, create, edit and delete time card entries. If you have access to view and edit entries, you have access to all records.
Time Clock Access	This allows you to set employee logins and passwords, work Schedules, and access to the In/Out board.
Time Card Runs	This allows you to run time card reports and lock down time cards so that no other editing can be done.

Time Clock Entries .....

The Time Clock Entries feature allows you to maintain employee time entries. You may create new entries, as well as edit or delete time entries. You may also print out employee time cards from here.

All changes (edits or deletions) are recorded and tracked. Selecting **Show Changes** will allow you to view entries that have been edited. A plus sign (+) to the right-side of an entry denotes a entry has been modified.

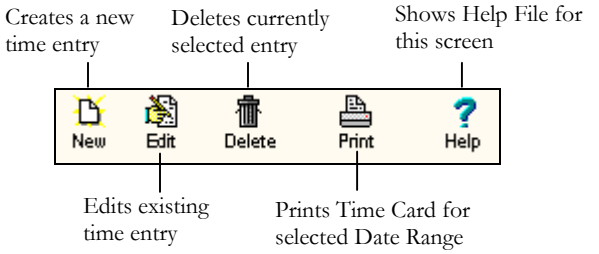
Time Clock Entries Feature



Tip: Double-clicking on an entry in the changed window (at the bottom) will bring up details of the entry.

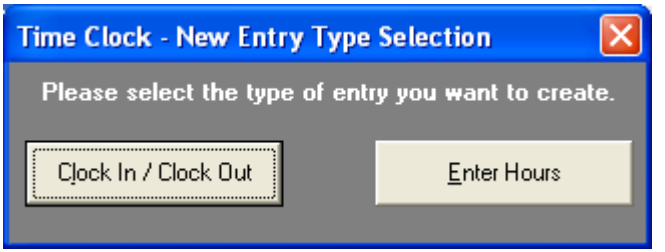
Time Clock Entries Toolbar

From the Time Clock Entries screen Managers have access rights to create, edit, or delete employee time entries.



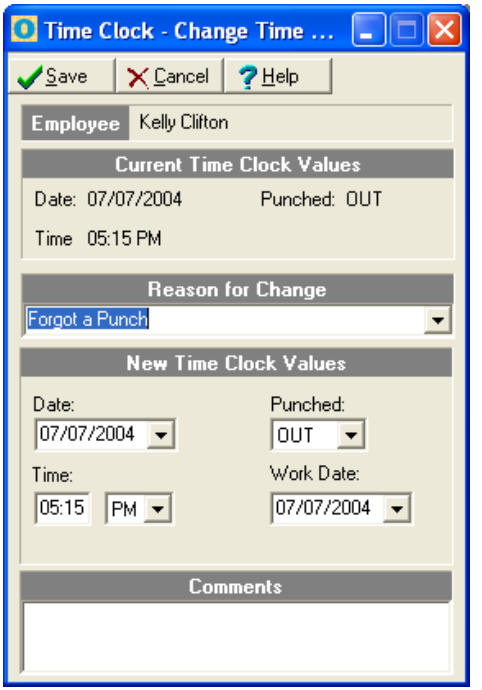
Creating a New Time Entry

You must be given rights to this feature. Clicking New, from the Time Clock Entries feature, will give you the **New Entry** window with the following options:



After clicking on New from the Time Clock Entries screen, you'll be given the choice of **Clock In / Clock Out** or **Enter Hours**.

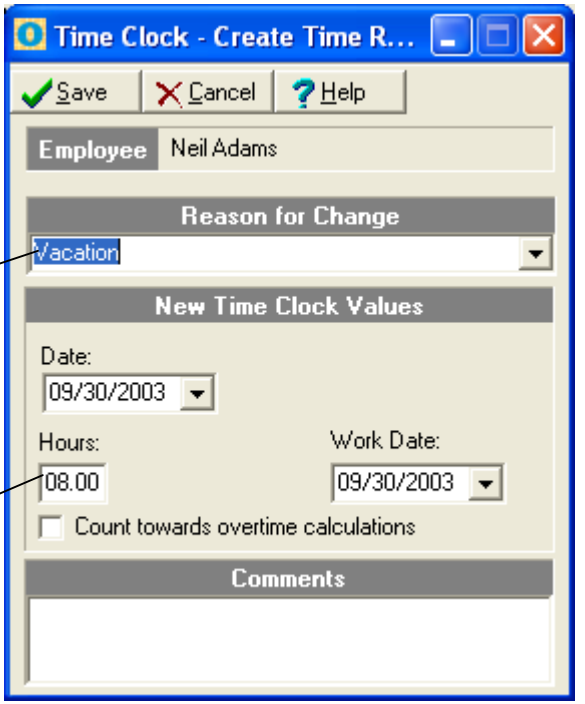
Selecting **Clock In/Clock Out** will allow you to enter a manual punch entry just as if an employee had clocked in or out. For example, you may enter a manual punch entry of 05:15 PM for a specific date.



Feature	Description
Reason for Change	A Reason is required for Creating a Manual Time Clock Entry or Entering Hours for a Date. (See **Settings > Reason Codes** in Administration screen.)
Date	This is the date of the punch entry.
Punched	This designates In or Out of the punch.
Time	This is the time of the punch entry.
Work Date	This is the Work Date that the punch refers to. (See Date Vs Work Date below for more info.)
Comments	Comments are not required but may be helpful when reading a reason at a later date.

Selecting **Enter Hours** will allow you to give a set amount of hours for a given date. For example, you may enter a manual time entry of 8 hours Vacation.

Enter Hours



Reason Code – Required when manually entering an entry

Enter how many hours employee is getting credit for

Feature	Description
Reason for Change	A Reason is required for Creating a Manual Time Clock Entry or Entering Hours for a Date. (See **Settings > Reason Codes** in Administration screen.)

Feature	Description
Date	This is the date the employee will get credit for.
Work Date	This is the Work Date that the punch refers to. (See Date Vs Work Date below for more info.)
Hours	This allows you to enter specific hours for a date, such as 8 hours for a Vacation day. The Date, Hours and Reason for New Entry fields are required.
Count towards overtime calculations	Designates entry to count towards overtime.
Comments	Comments are not required but may be helpful when reading a reason at a later date.

Date Versus Work Date

When creating a new time entry, there are two date fields: Date and Work Date. The Work Date represents the date the entry is counted towards. Normally, you won't need to change the Work Date unless you have work shifts that cross over midnight. For example, Josh starts work and clocks in at 8 PM on Monday night. He gets off work at 4 AM on Tuesday morning, but forgets to clock out. A manual time entry is created for him punching him out at 4 AM; the Work Date is of the previous date (the actual date Josh started work). The program knew that Josh had clocked in at 8 PM the previous day and since he had not gone over 13 hours between punches it counted the OUT punch to the previous date.

Editing a Time Entry

Edit allows you to change an existing entry. You must be given rights to have this feature. Remember that the **Reason for Change** block is required and tracked. Editing a time entry is similar to creating a new entry except you only have the choice to change a punch time entry.

Deleting a Time Entry

Delete will erase the selected time entry and record the deletion. All changes and deletions are recorded and tracked. To view deleted time entries, go to Reports > Deleted Time Clock Entries.

Printing an Employee Time Card

Print allows you to print an employee time card for the selected date range.

Getting Help

Help allows you to bring up the help file for this screen.

Time Card Entries

The time card entries have the following coding:

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Plus (+) Sign	A plus (+) sign designates a punch was changed or manual entry was entered.
Asterisk (*)	An asterisk (*) designates that there is a double-punch; either two IN punches or two OUT punches together. Action should be taken on this type of entry of either adding a new entry or correcting an existing entry. Hours cannot be calculated for a double-punch entry.

CAUTION: If you see an asterisk (*) next to a time entry this means that some type of action should be taken, such as correcting a punch.

Time Card Entries

Work Day	Date	Punch Time	Adj. Time	In/Out	Hours	Day Hours
Monday	03/11/2002	09:06 am	09:10 am	IN		
Monday	03/11/2002	04:22 pm	04:30 pm	OUT	07.33	
Monday	03/11/2002	10:32 pm	10:30 pm	IN		
Monday	03/11/2002	11:34 pm	11:40 pm	OUT	01.17	
Monday	03/12/2002	01:35 am	01:30 am	IN		8.50 *
Tuesday	03/13/2002	01:37 am	01:40 am	IN		*
Tuesday	03/13/2002	09:51 am	10:00 am	OUT	08.33	8.33
+ Wednesday	03/14/2002	01:54 am	01:50 am	IN		
Wednesday	03/14/2002	09:58 am	10:00 am	OUT	08.17	8.17
+ Friday	03/15/2002				08.00	8.00

Asterisks (*) denote double entries

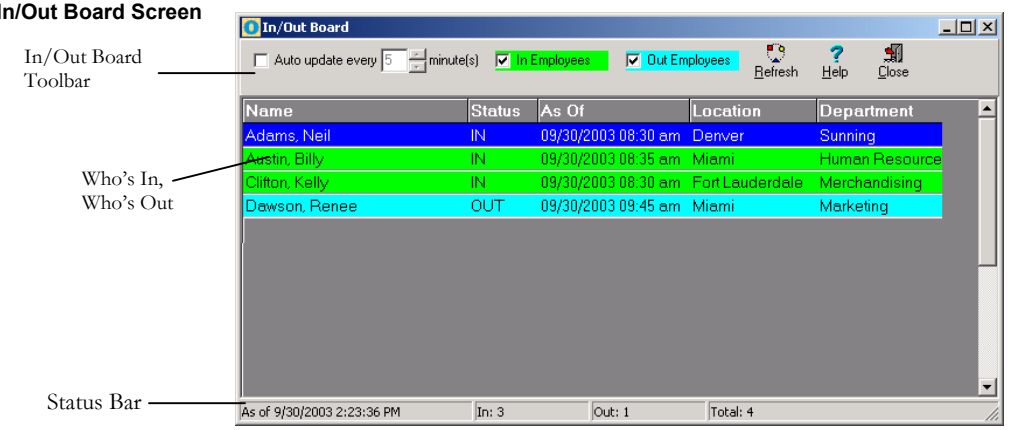
Plus sign (+) denotes manual entry was made

Tip: Right-clicking on an entry will show you the rounding rules (Work Schedule Rules) for that entry.

IN/OUT BOARD .....

The In/Out Board allows you to see, at a glance, employees who are in and out. The In/Out Board will refresh itself if the Auto Update feature is checked, otherwise, clicking the Refresh button will update the board.

In/Out Board Screen



Feature	Description
Auto update every __ minute(s)	This allows you to set how often this board should update for you. **Note:** This is not a "live" board and will only be updated by the Auto Update or pressing Refresh.
Feature	**Description**
In/Out Employees	This allows you to see employees who are In or Out at a glance.
Refresh	Clicking this button will refresh the list.
Help	This gives you help regarding the current screen.
Color-coding:	c. Green – denotes employees who are clocked IN. d. Teal (bluish-green) – denotes employees who are clocked OUT.

Administrators can have access to view all locations and departments or only specific locations and departments depending on their security access rights. Employees may be given access to all locations and departments or their specific location and/or department or no access to the In/Out Board. (See In/Out Board Access under Time Clock Access.)

Adding a New Employee

Click **Employee Detail** Feature column.

The Employee Detail screen allows you to add, edit, and delete employees, and, if installed, shares common screens with Attendance Controller (Category Assignments) and Confidential Employee Record (EEO and Personal Contacts).

To add a new employee, follow these steps:

1. Click 

from the **Employee Browse** or **Employee Detail** screen.
2. As a minimum, enter First Name, Last Name, Hire Date, Employment Status, Work Status, and Location and Department. These fields are required. (To set up locations and departments, see Locations and Departments under Administration.)
3. Click Save.

NOTE: The SSN is not required when entering an employee in Optima. However, when exporting time card entries, if one of the selected payroll formats requires the SSN, you will need to enter it before exporting.

Deleting an Employee

CAUTION: This will delete ALL information on the current employee including any records in Optima Attendance Controller and Optima Confidential Employee Record.

To delete an employee, and all associated records, follow these steps:

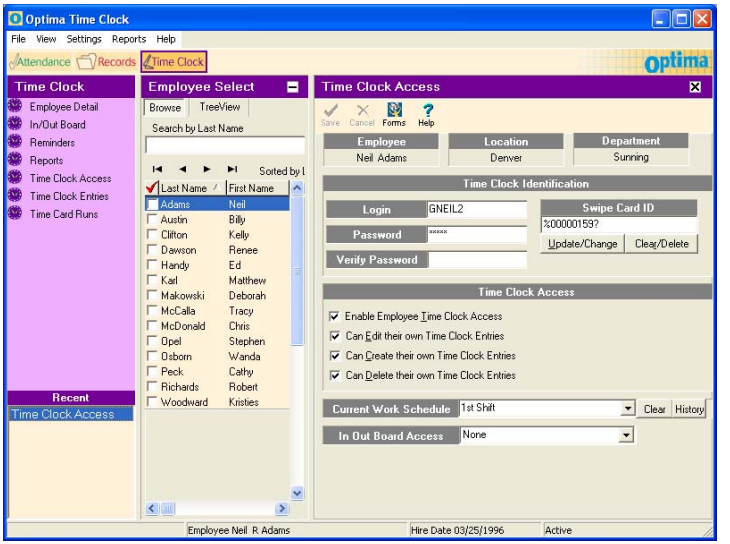
1. From **Employee Detail**, select an employee by clicking on his or her name.
2. Select **File > Delete Employee**.
3. Click **Yes** to the "Are You Sure?" message.

Giving Employees Access to Clock In

Click **Time Clock Access** from the Feature Column.

The **Time Clock Access** screen allows you to set up employee logins/passwords, swipe card access, individual access to create, edit and delete their time card entries, assign Work Schedules, and employee In/Out Board access. A manager or administrator will always have access to the In/Out Board screen.

Time Clock Access Feature



Feature	Description
Employee, Location, Department	This is shown to make it easier when assigning access.
Search By	This allows you to search by Last Name, First Name, SSN or ID.
Search For	Entering one character at a time will do an incremental search. For example, entering the letter "K" will bring up the names which start with K. Adding an L will search out names with KL and so on.
Time Clock Identification (Changing Employee Password)	Time Clock Identification allows you to change the selected employee's Login and Password. Just enter the new Login and password and click on Save to change.
Swipe Card ID	For the Swipe Card ID option, you'll need a magnetic swipe card or bar code reader and pre-encoded cards. To assign a pre-encoded swipe card, click on Update/Change, then swipe the card through the swipe card reader. If an employee has an assigned swipe card ID number, you will also have the option to Clear/Delete.
Time Clock Access	Time Clock Access assigns employee options for: a. **Enable Employee Time Clock Access** – This allows the selected employee to clock in and out. This is required to be selected if the employee is allowed to clock in/out.

Feature	Description
Time Clock Access (cont.)	b. **Can create their own Time Clock Entries** – gives employee the ability to create Time Clock entries. c. **Can Edit their own Time Clock Entries** – gives employee the ability to edit Time Clock entries. d. **Can Delete their own Time Clock Entries** – gives employee the ability to delete existing entries.
Current Work Schedule **Note:** To create a Work Schedule, see **Chapter 8** - Creating and Editing Work Schedules.	Current Work Schedule allows you to assign a Work Schedule for rounding and reporting purposes. a. **Clear** allows you to remove this work schedule from an employee. b. **History** allows you to view changes to an employees work schedule. This also allows you to edit the Start Date.
In/Out Board Access	In/Out Board Access allows you to assign an employee access to see None, All employees, or employees by Location or department. (See **In/Out Board** on page 81.)

Employees Not Rounding on the Correct Work Schedule .....

Employees may be assigned different rounding rules over the course of their employment. Every time an employee is given a new work schedule, he or she gets a new Start Date from which the current work schedule begins. A new work schedule will only round from the Start Date going forward. Any punches before this date will not be rounded on this schedule.

There are times when you may need to change the start date for rounding calculations. For example, if an employee was accidentally assigned the wrong work schedule for a week where the work schedule assigned was rounding him/her at 10-minutes instead of at 6-minutes, you would want to change to the new work schedule and have the program calculate all past punch entries.

The work schedule start date is edited through the **History** Tab on the **Time Clock Access** screen. For example, if the start date is 11/5/01, rounding will only occur from this date forward. Any punches before this date will not be rounded on this schedule.

CAUTION: Editing the Work Schedule date may affect punches for the current employee that have already been paid for.

Changing an Employee's Work Schedule Date

Changing an employee's work schedule date and having the program re-calculate according to the new work schedule is a two-step process:

First Step (Change the Work Schedule Start Date)

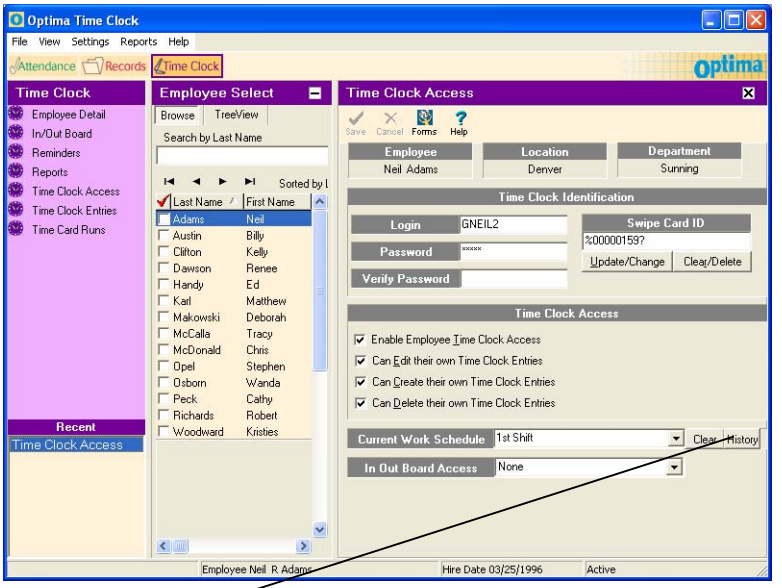
1. From **Time Clock Access**, click on History (Current Work Schedule).
2. On the **Work Schedule History** screen, double-click on the Start Date you want to change. For example, if you want to change the Start Date of 04/18/2002 to 05/01/2002, double clicking directly on the 04/18/2002 date will bring up an edit box.
3. Enter the Start Date of the new work schedule.
4. Leave the Ending Date blank if this is the most current Start Date.
5. Click Save.
6. If you need to have time punches recalculated according to the new work schedule, go to the Second Step below; otherwise, punches may not have their time calculated correctly.

Second Step (Recalculate the Punch Time Entries)

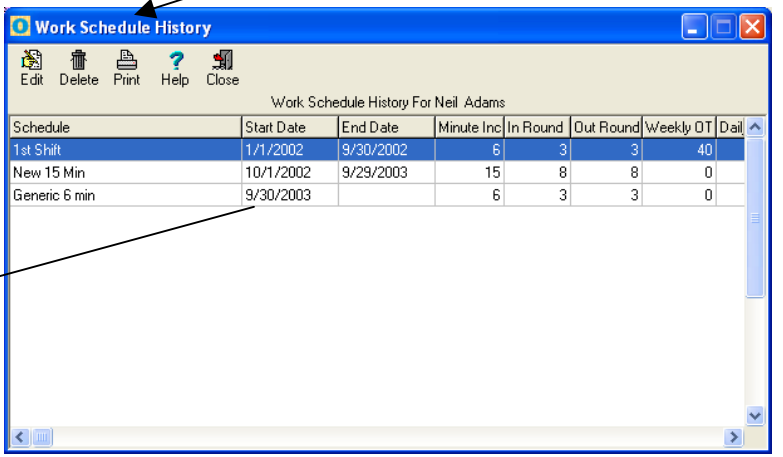
You'll need to edit any punch time entries that need to be recalculated and click Save. The act of clicking the Save button will recalculate the selected punch time entry according to the new work schedule.

1. From **Time Clock Entries**, select the employee and the punch time you wish to re-calculate.
2. You may select the punch time entry either by double clicking on the punch entry or by highlighting it (by clicking once on the entry) and selecting the Edit icon.
3. Do not change the date or time. Select a **Reason for Change**. (You cannot save an entry without selecting a reason.)
4. Click **Save**.
5. Repeat the above steps for any punches that need to be re-calculated.

Clicking Save will re-calculate the punch time entry according to the work schedule. For example, if you changed this employee's work schedule from 10-minute rounding to 6-minute rounding, then saved any punch entries that fell within the Start Date, their punch entries would be recalculated.



Work Schedule History



Double clicking on a Start Date will allow you to edit the date.

Chapter 8: Creating and Editing Work Schedules

This chapter will allow you to set up your work schedule rules and define your daily work hours for reporting purposes.

As a rule, many businesses allow a grace period for employees when clocking in or out. This allows for time variations on clocks, watches and time devices throughout a company. Rounding time also makes calculating payable time easier.

Chapter Contents:

Rounding Explained

Optima Time Clock can automatically round off in 2, 3, 4, 5, 6, 10, 12, 15, 20, 30 and 60-minute time slices, and it will calculate the time in decimals, unlike many mechanical Time Clocks. This saves time by not having to convert the minutes to decimals. **Note:** If you don't round, then select the Generic – No Rounding rule.

Time Clock rules can be assigned to individuals or groups. Rules are usually defined for punching IN early or late, and OUT early or late.

EXAMPLE

Here is an example of rounding using the 15-minute rule:

Richard comes in a few minutes early and clocks in at 07:55.
Tanya is running late and clocks in at 08:04.

Using the 15-minute rule, both Richard and Tanya's payable time would be clocked in at 08:00. Their time was rounded to the nearest 15-minute mark. The next 15-minute mark would be 08:15, then 08:30, and so on.

However, using the 6-minute rule and the above clock-in times, Richard's payable time would be clocked in at 07:54. The next 6-minute mark for Richard would be 08:00. Tanya's payable time would be clocked in at 08:06. The next 6-minute mark would be 08:12, 08:18, and so on. Their time was rounded to the nearest 6-minute mark.

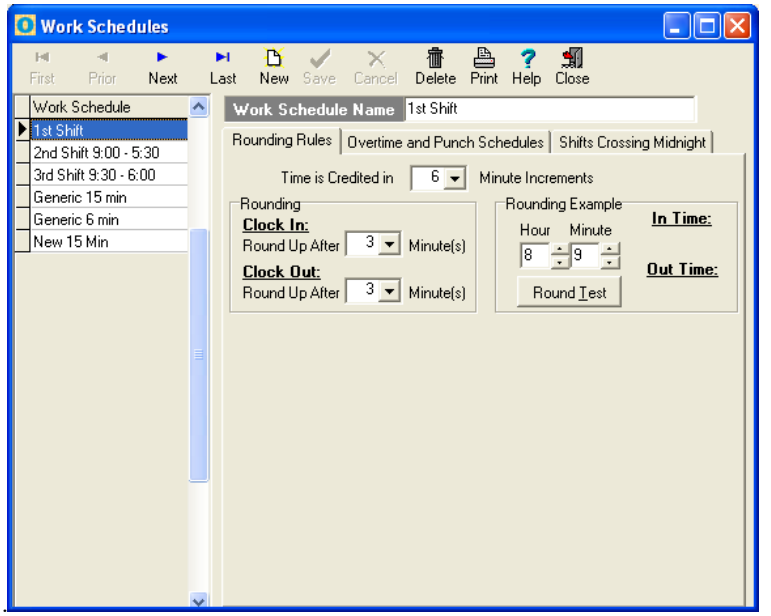
Optima Time Clock comes with three commonly used rounding rules: 6-minute, 10-minute and 15-minute generic rules that are set up to round to the nearest mark. You may choose one of these and rename it or set up your own.

Work Schedule Rounding Rules

Go to **Settings > Work Schedules**.

The program comes with three commonly used rounding rules. You may use one of these and rename it or create your own.

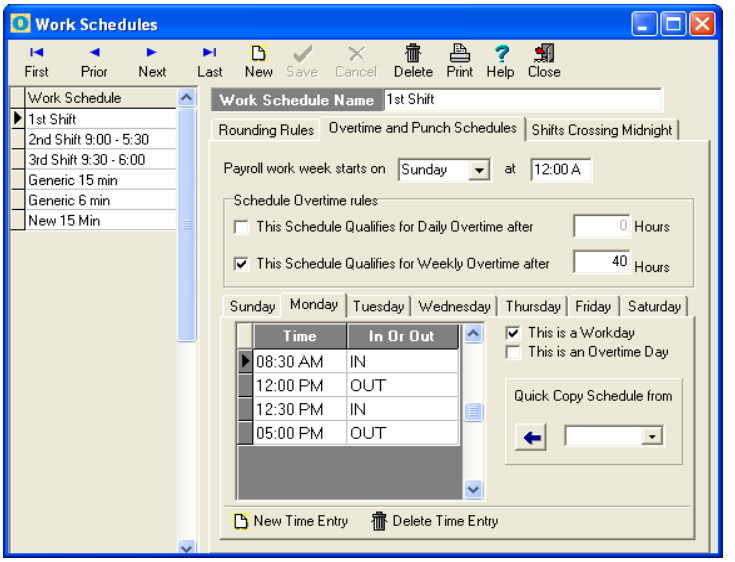
Work Schedule – Rounding Rules Tab



The Rounding Rules Tab has the following features:

Rounding Rules	Description
Work Schedule Name	Name the Work Schedule here.
Time Credited in __ Minute Increments	This allows you to select rules for increments up to 60 minutes (increments must be divisible by 60).
Rounding	When the **Time Credited in __ Minute Increments** is selected, the default rounding is set to round to the nearest credited increment. You may change this setting to fit your needs. Use the **Rounding Example** to test your changes.
Rounding Example	This allows you to see how your rounding will affect true clocking in/out punches. Set the Hour and Minute to test how rounding will affect punch times.

Work Schedules – Overtime and Punch Schedules Tab



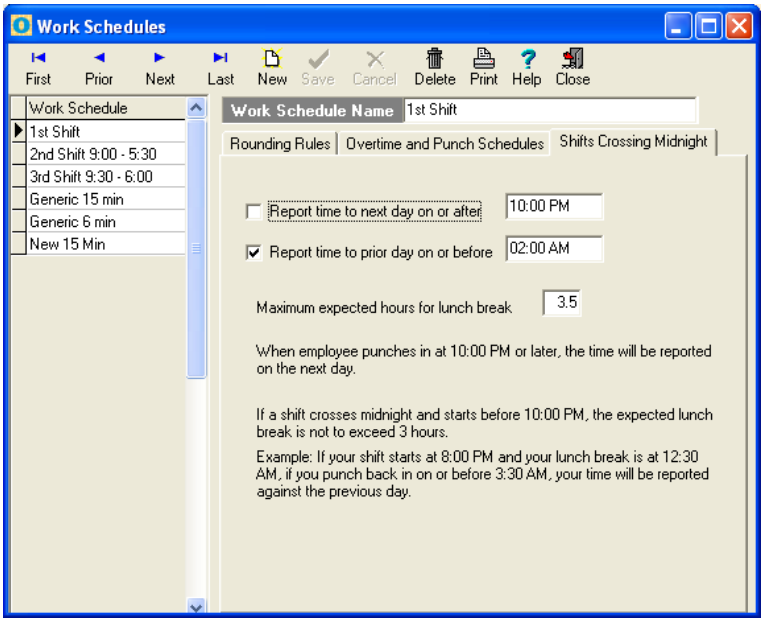
The Overtime and Punch Schedule Tab has the following features:

Overtime and Punch Schedules	Description
Payroll work week starts on…	This determines the day that your work week begins on, which is defined as the start of the pay week.
This Schedule Qualifies for DAILY Overtime after __ Hours	Select this option if your policy is to give overtime after working so many hours on a **DAILY** basis. (For example, anything over 10 hours daily is considered overtime.)
This Schedule Qualifies for WEEKLY overtime after __ Hours	Select this option if your policy is to give overtime on a **WEEKLY** basis. (For example, anything over 40 hours weekly is considered overtime.)
Daily Schedule	This allows you to set up daily schedules that can be reported on. (For example, if you wanted to know who was 15 minutes or more late on Mondays, you could run an Exceptions report.)
This is a Workday	This designates the selected day as a regular workday.
This is an Overtime Day	This designates the selected day as an overtime day.
Quick Copy Schedule From	After you set up the first workday, this allows you to copy it to the next workday so you don't have to re-enter the same hours.
New Time Entry	This allows you to enter a new entry for your employees daily work schedule.
Delete Time Entry	This allows you to erase an entry.

Shifts Crossing Midnight

You only need to set up the rules for Shifts Crossing Midnight if you have employees that work past midnight. This allows the Work Day to be defined.

Work Schedules – Shifts Crossing Midnight Tab



Feature	Description
Report time to **NEXT DAY** on or after _____.	This allows you to set the time punches' Work Date to the next day. For example, if the night shift starts work at 10 PM on Monday night, but the entire shift (10PM – 6 AM) is counted for working on Tuesday, then you would select this option.
Report time to **PRIOR DAY** on or before ____.	This allows you to set the time punches' Work Date to the previous day. For example, if the night shift starts at 2 AM on Tuesday but the entire shift is counted for working on Monday, then you would select this option.
Maximum expected hours for lunch break ____.	We recommend leaving this option at the default 3.5 hours. This option is for punches that cross midnight and allows for employee's to be counted on the correct work day when working long or double shifts.

More About Rounding

Optima Time Clock rounding is based on three points:

1. What you select for **Time Credited in Minute Increments**
2. What you set for Clocking In and Out rounding
3. Assigning the Work Schedule to an employee through **Time Clock Access**.

Optima Time Clock automatically rounds to the nearest mark based on your choice of minute increments. Optima Time Clock will round up or down at about the halfway mark. For example, if you're using Optima Time Clock to credit in 6-minute increments, then the program will round up AFTER 3 minutes and round down before this time. The key word is *After*. The program will ROUND UP AFTER however many minutes you select.

Optima Time Clock allows you to select rounding up to the designated credited amount, minus one minute. If you choose to credit in 6-minute increments then you could choose from 1 to 5 minutes for rounding. If you choose to credit in 10-minute increments then you could choose from 1 to 9 minutes for rounding and so on.

TIP: If in doubt, use the Round Test to see how the time will be rounded.

Setting Up a Work Schedule

Setting up a Work Schedule allows your employee's punch times to be rounded and allows you to report on various settings according to the Work Schedule. For example, if you wanted to know who was clocking in late on Mondays for the month of June, you could run an Exceptions Report. All employees that clock in/out must be assigned a Work Schedule for rounding and reporting purposes.

To set up your work schedule, follow these steps:

1. Click **New**.
2. Enter a descriptive work schedule name.
3. Select how your time is credited for rounding purposes.
4. If you round to the nearest mark, you may leave the defaults in the Rounding block as they are. If, however, you round nearer or farther from the nearest mark, then you may change the rounding to suit your needs.
5. Check how the program will round for you by entering a clock in/out time in the Rounding Example block. If the time isn't rounding the way you want, then change the Rounding time and check it again.
6. Select whether this work schedule qualifies for DAILY overtime and after how many hours.
7. Select whether this work schedule qualifies for WEEKLY overtime and after how many hours.

Setting up the Daily Schedule

To define the daily schedule, follow these steps:

1. Select a day of the workweek and specify if it is a Workday and/or an Overtime Day. An Overtime Day is any day that is automatically counted as overtime such as Saturday or Sunday.
2. Click New Time Entry:
   a) Enter what time employees on this work schedule would normally start work. Press the TAB key or click New Time Entry to go to the next row.
   b) Enter what time the employees would normally break for lunch. Press the TAB key to go to the next row.
   c) Enter what time the employees would normally come back from lunch. Press the TAB key to go to the next row.
   d) Enter what time the employees would normally leave for the day.
3. Click on the next day and enter their start and end time for this day. You may also use the Quick Copy Schedule feature to copy the previous day's entry. Click Save to save this work schedule.

Rember to assign a work schedule to each employee under Time Clock Access; without an assignment, employee entries and overtime will not follow the work schedule rules. This can result in payroll errors.

Chapter 9: Preparing Time Card Runs

Time cards are prepared by the Payroll Administrator or other designated person who can run time card reports or export this data to your payroll program. The person who has access to Time Card Runs can lock out employees and other managers from making any changes to specific date ranges and save this information so that changes cannot be made to time that has already been paid for.

Chapter Contents:

Time Card Runs

To go to Time Card Runs click on the **Time Card Runs** Feature.

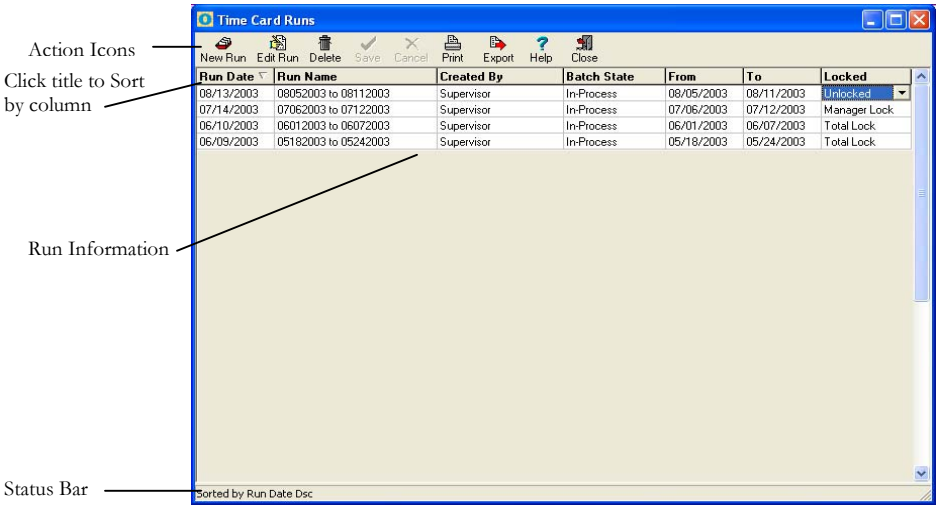
The Time Card Runs screen allows you to create time card reports for a specific date range for employees. This data may also be exported to your payroll program. You may break down the report by location, department or specific employees. The Time Card Run report will show you regular time, overtime, the payroll code description for First and Second column (from the Time Clock Tab under Global Preferences), and Other time (anything that is not covered under regular, overtime and payroll code descriptions), along with the total hours.

Creating a New Time Card Run

To create a new time card run, follow these steps:

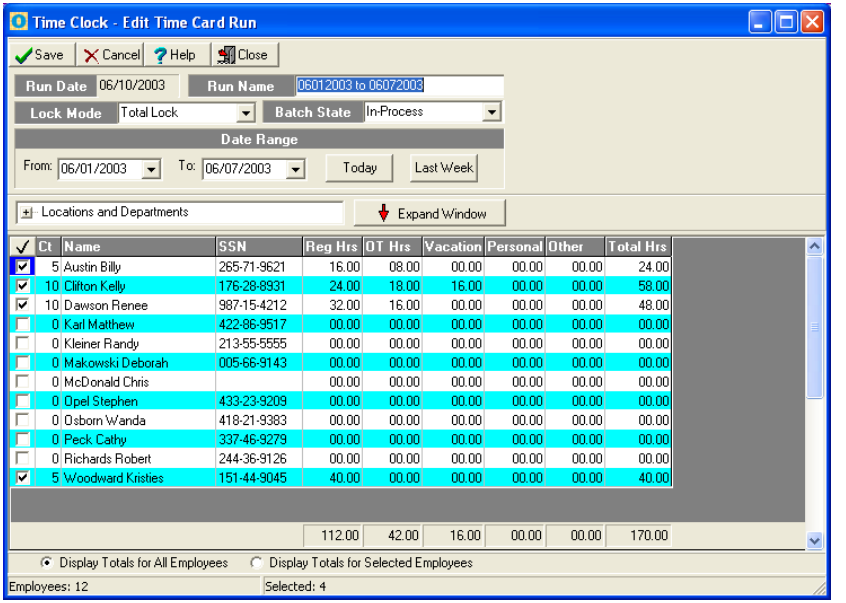
1. After clicking on Time Card Runs, click **NEW RUN**.
2. Enter a name in the Run Name block (for example: Week of Apr 7 2002). Special characters are not allowed.
3. Select a date range for this run.
4. Select either Manager Lock or Total Lock for Lock Mode (see below for more information).
5. Select Batch State of either In-Process or Completed.
6. Select which Locations/Departments you want processed by clicking on Expand Window (see Selecting Locations/Departments).
7. Click Save, then OK.
8. Click on PRINT to preview the selected run.

Time Card Runs Screen



Feature	Description
Sort	Click on column title to sort by that column.
Action Icons	a. **New Run** – This allows you to create a new time card run. b. **Edit Run** – This allows you to edit existing runs until the Batch State status "Completed" is selected. c. **Delete** – This deletes an existing run. d. **Cancel** – This cancels changes to the current run. e. **Print** – This allows you to print the selected time card run.
Run Information	a. **Run Date** – This is the date of the run. b. **Run Name** – This is the specified name. c. **Created By** – This is the name of the individual logged in when creating the run. d. **Batch State** – This is the specified state from the Edit Screen. e. **From/To** – These are the dates specified. f. **Locked** – This is the specified Lock type from the Edit Screen.

The Time Card Run Edit Screen



The Time Card Run Edit window has the following features:

Feature	Description
Run Date	This is the date the run was created.
Run Name	This allows you to enter a name for the run.
Print	This allows you to print a Detailed or Summary report.
Date Range	This allows you to select the date range for this batch.
Lock Mode	This allows you to select from three different modes. a. Unlocked – This allows anybody with access to create, edit or delete entries. b. Manager Lock – locks anybody with Manager and Employee access from creating, editing, or deleting within the selected date range. This allows the Payroll Personnel to pay employees without having the time card entries changed at the last moment. c. Total Lock – locks everyone, regardless of access level, from making any changes with the selected date range. Administrators with Time Card Run Access are also locked out from making any changes. If changes need to be made, the selection would need to be changed to Unlocked or Manager Lock mode.
Batch State	a. In-Process – for the current card run you're working with. b. Completed – select when Time Card Run has been paid.
Locations and Departments	Clicking on Expand Window or the plus (+) sign next to Locations and Departments will expand this window to choose specific locations and departments. Those employees from the chosen locations and departments will show up in the employee window.
Employee window	a. Checkbox – This allows you to select specific employees by clicking in the checkbox. b. Ct – This shows a count of time entries. c. Name – First and Last name of employee(s). d. SSN – Social Security Number of employee(s). e. Reg Hrs – This shows regular hours. f. OT Hrs – This shows overtime hours, if applicable. g. Column 1 – (shown as Paid Vacation in screenshot above) Payroll Description Column h. Column 2 – (shown as Paid Personal in screenshot above) Payroll Description Column i. Other – This shows time not counted in e – h. j. Total Hrs – This shows total of regular plus overtime hours.
Radio Buttons:	a. Display Totals for All Employees – Select this option to show totals for all employees. b. Display Totals for Selected Employees – Select this option to show totals for only the selected employees.

Viewing Time Card Data

When viewing time card data, keep in mind that overtime will only show if you have set up a Work Schedule and assigned it to your employees. The Work Schedule will have rules regarding overtime and what day your Work Week starts on. See Chapter 8 for detailed information about Work Schedules.

Frequently Asked Questions

Q: I've created a time card run covering 8 days. For one employee it shows 59 hours of worked time, but 0 hours of overtime. Why is this?

A: The start of your Workweek (set in the Work Schedule) determines the week for overtime. Check to make sure you have a Work Schedule assigned for this employee by going to **Time Clock Access > Current Work Schedule**. If there is one, go **to Settings > Work Schedules** and make sure the assigned Work Schedule has the appropriate Overtime settings. If the overtime settings aren't set up, then go to Work Schedules and create one before assigning it. (See **Chapter 8 Creating Work Schedules** for detailed information.)

For Example: If a time card run is created to include Randy from (Wed) May 8, 2002 through (Thur) May 16, 2002 and it shows that he worked 59 hours during this time, this doesn't necessarily mean he has overtime. Weekly overtime, if any, is calculated on the last day worked of the workweek. Daily overtime, if any, will be calculated on the same day worked.

Daily Overtime will be calculated on the same day worked.

Work Weeks Overlapping

	May 2002						
	Sun	**Mon**	**Tue**	**Wed**	**Thur**	**Fri**	**Sat**
				1	2	3	4
Workweek 1	**5**	**6**	**7**	**8**	**9**	**10**	**11**
Workweek 2	**12**	**13**	**14**	**15**	**16**	**17**	**18**
	19	20	21	22	23	24	25
	26	27	28	29	30	31	

Weekly Overtime will be calculated on the last day worked for that workweek.

Assuming our Workweek starts on Sunday, the date range of May 8 – May 16 covers two separate Workweeks. (**Workweek1:** May 5 – May 11 and **Workweek2:** May 12 – May 18.) If Randy does not work overtime on a daily basis or for the whole workweek, he won't have any overtime. But, if he does work overtime for Workweek1, it will be calculated for that Friday (May 10) and be included on the report. Overtime worked for Workweek2 will not be reported unless Friday, May 17 is included.

Factors involved in calculating overtime:

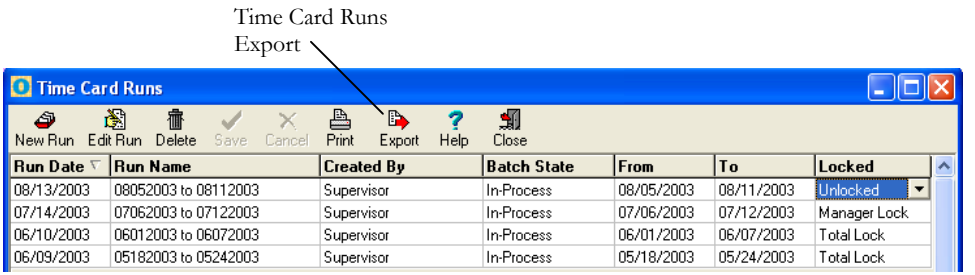
1. What is the Workweek Start Day? (Sunday? If the workweek starts on Sunday, this would mean the workweek is from Sunday through Saturday every week.)
2. Do your employee's receive overtime based on time worked on a daily basis? (**Example:** Daily time worked over 10 hours receive overtime.)
3. Do your employee's receive overtime based on time worked on a weekly basis? (**Example:** Weekly time worked over 40 hours receive overtime.)
4. When was the Work Schedule assigned to the employee?

Overtime	Description
Daily Overtime	Overtime will be posted on the **day** the employee goes over the amount of hours set for Daily Overtime on the Work Schedule. (**Example:** if > 10 hours daily is considered overtime; if employee works more than 10 hours on Tue, overtime will be shown same day.)
Weekly Overtime	Overtime will be posted on the **last day worked on the workweek**. (**Example:** if > 40 hours a week is considered overtime; if employee works Mon – Fri, overtime will be shown on Fri.)

Exporting Time Clock Data .....

You may export time entry data two different ways in Optima Time Clock. The first way is from the Export feature under Time Card Runs. The other way is from Export Time Clock Data under the File menu.

Export Type	Description
Export Time Clock Data	Exports hours worked and general employee information to a .csv file. This is a general export found under the File menu.
Time Card Runs Export	This is a specific export feature that exports to several different payroll formats (See Time Card Runs Export above.)



Time Card Runs Export

From Time Card Runs Export you may export to a text file into the following Payroll formats:

- ADP/PC Payroll for Windows
- Paychex
- PaycomOnline
- PayAmerica
- QuickBooks® Pro and Premier Editions 2003/2004
- RDE (Summit Payroll Express)
- Rapid Payroll
- UltiPro

Please call or email Tech Support for other formats.

* - Optima Time Clock is integrated with QuickBooks. When you click on Export, the time data is automatically transferred into QuickBooks. (See QuickBooks Integration below.)

QuickBooks Integration

Optima Time Clock can import time data directly into QuickBooks Pro and Premier Editions 2003 and/or 2004. To import from Optima Time Clock you will need to set up QuickBooks for the following:

- to view Weekly TimeSheets
- appropriate Payroll Items that correspond with Optima Time Clock

NOTE: Optima Time Clock and QuickBooks should be set up prior to peforming the following steps.

The following steps will set up Optima Time Clock to import directly into QuickBooks:

1. Open Quickbooks.
2. Open Optima Time Clock. Check your version number by going to Help > About. You should have at least v1.4.1.1 or higher before continuing.
3. From within Optima Time Clock go to Time Card Runs and select Export.
4. If Quickbooks isn't an option in the left column, hold down *Ctrl-Alt-Q* to display it.
5. Click Open Quickbooks. This will bring up a QuickBooks message asking: Do you want this application to access your Quickbooks Company File?
6. Select "Yes, Always" or "Yes, This Time" to allow access. Click Yes if you receive the Confirm to Proceed message. Note: if you select "Yes, This Time", the next time you open Quickbooks from Optima Time Clock it will ask you again for access.
7. Click back on Optima Time Clock. You should see two columns which may be filled in with data already. The Payroll Code column are codes related to Optima.

The Payroll Item codes are related to Quickbooks. You'll need to relate the appropriate Payroll Code from Optima to the Payroll Item code in Quickbooks. The Optima Payroll Codes should be displaying. Clicking in the corresponding row for the Quickbooks Item code will bring up a drop down box.

8. Click Save after making any changes.
9. Click Export.

Exporting Time Clock Data

From **File > Export Time Clock Data**, you may export hours worked and general employee information to a .csv file which can be opened in MS Excel or other spreadsheet programs.

Export Time Clock Data Screen

The Time Clock Export feature allows you to export the following data:

- Last Name
- First Name
- Middle Name
- SSN
- Date of Birth
- Location
- Department
- Punch Hours
- Punch Changes

Features	Description
Export Type	a. **Single File** – Exports Employee Data and Hours Worked to a single file. If Export Punch Changes is selected, it will export to a separate file in addition to the Hours Worked. b. **Relational File** – Exports Employee Data and Hours Worked to two separate files. If Export Punch Changes is selected, it will export to another separate file.
Export	This exports the data once you have settings complete.
Select Employee to Export	This allows you to select specific employees, locations and/or departments to export.
Hire Range Filter	This allows you to filter on a specific hire date range.
Job Status Filter	This allows you to filter on full and part time.
Employee Status Filter	This allows you to filter on Active, Inactive or Terminated employees.
Select Employee Data Fields to Export	a. Available Fields - This is the list of fields to choose from. b. Fields to Export (In Export Order) – These are the fields chosen.
Export Time Clock Data	a. Export Hours Worked for Period – This allows you to select a date range for time card data for the selected employee(s). b. Export Punch Changes – This allows you to export punch changes.

To export this data, follow these steps:

1. From the File menu, select Export Time Clock Data.
2. Select the export type: Single File or Relational.
3. Expand the tree, if necessary, and select the employees to export.
4. Select the data fields to export by either double-clicking on the file or selecting the file and clicking on the arrow pointing to the right.
5. If needed, select the Export Hours Worked option with a date range.
6. If Export Hours Worked is selected you can select to Export Punch Changes option.
7. Click Export.

Chapter 10: Using Reports

Optima Time Clock includes several powerful reports to help you manage employees and prepare for payroll. For additional reports, please try Optima Confidential Employee Record, which offers you the power of additional employee information tracking.

Chapter Contents:

Report List

Here is a list of the reports you can run:

- Employee Summary Report
- Employee Anniversary Report
- Hours Worked Report
- Deleted Time Entries Report
- Work Schedule Assignments Report
- Exceptions Report
- Time Cards Report
- Time Card Runs Report
- Time Card Runs Extended Report
- Reminders Report
- ID Badges
- Table Listings

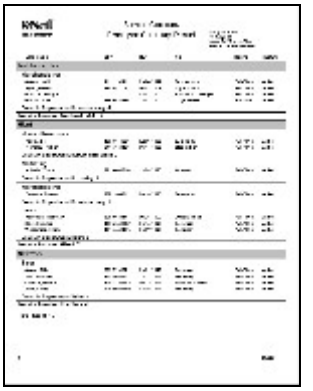
Report Interface Features

The following features are available on each report interface:

Feature	Description
Preview	This allows you to see how the report will show when printed.
Print	This prints the report.
Printer Setup	This allows you to set printer options.
Help	This will allow you to view help regarding this screen.
Close	This exits the report interface.
Grouping Options	This allows you to group on Location and Department.
Display Options	This allows you to display SSN.
Export Options	This allows you to not export headers.

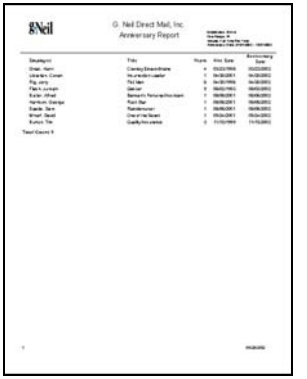
Employee Summary Report

The **Employee Summary Report** is a quick overview of your employees showing SSN, date of hire, title, active status, and full/part time status.



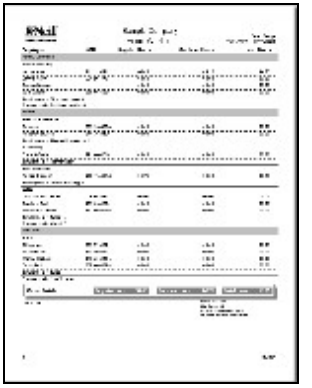
Employee Anniversary Report

The **Employee Anniversary Report** shows the anniversary date of employees according to the selected date range.



Hours Worked Report

The **Hours Worked Report** shows regular hours, overtime hours and total hours. You may select specific employees by date range.

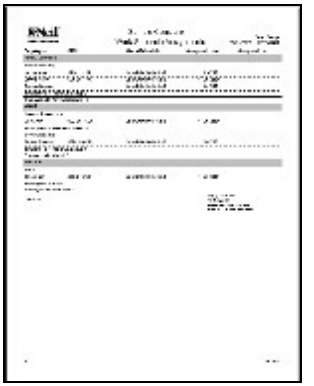


Deleted Time Clock Entries Report

The **Deleted Time Clock Entries Report** shows entries that were deleted along with the reason, comments and login name of the person deleting the record.

Work Schedules Assignments Report

The **Work Schedules Assignments Report** shows which work schedule each employee is on and when it was assigned.

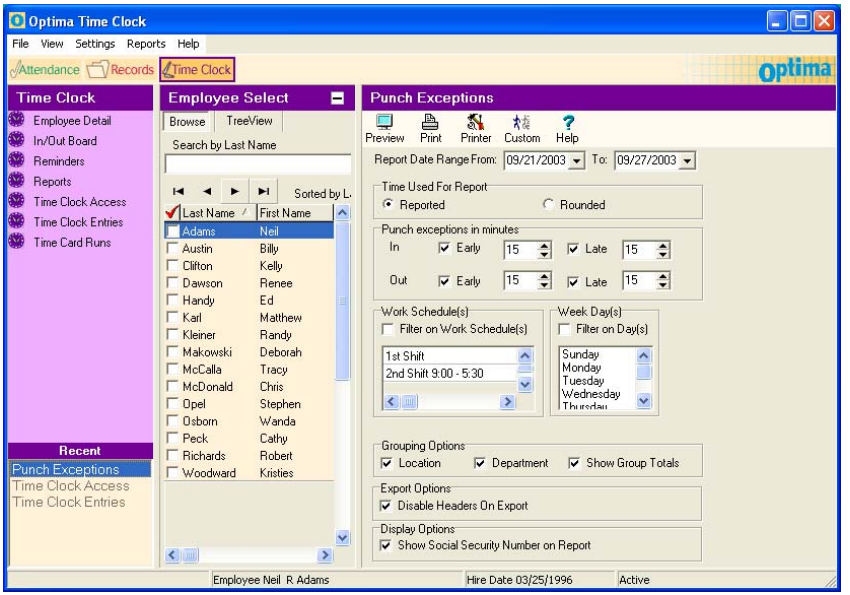


Exceptions (Punch)

Exceptions are broken down into two separate reports: Punch Exceptions and Hours Exceptions. The Punch Exceptions report allows you to report on early or late clock in and out punches. You may even report on actual clock in/out time or on the rounded time.

NOTE: Your employees must be assigned to a Work Schedule with the daily hours set up to properly view this report.

Punch Exceptions Report Pane



The following are other options that are available on the Punch Exceptions Report. For a list of features not listed here, please see **Report Interface Features** above.

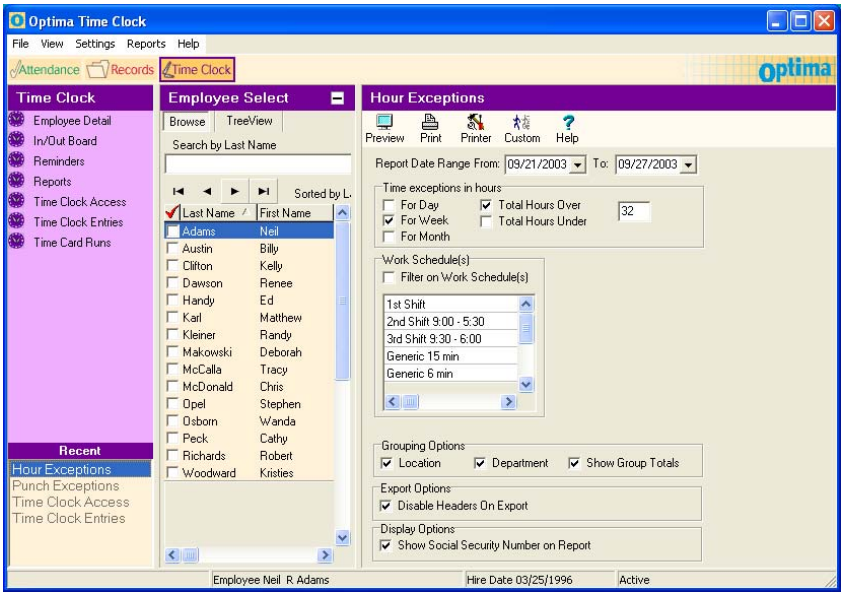
Feature	Description
Report Date Range	This allows you to set a date range for the report.
Time Used For Report	This allows you to report on Reported (actual punch time) or Rounded time.
Punch Exceptions in Minutes	This allows you to view how early or late, in minutes to report on.
Work Schedule(s)	This allows you to filter on a selected work schedule.
Week Day(s)	This allows you to filter on specific days.

Exceptions – (Hours)

The Hours Exceptions Report allow you to report on hours over or under by day, week or month. This report can be used to monitor which employees may be near overtime.

NOTE: Employees must be assigned to a Work Schedule with the daily hours set up to properly view this report.

Hour Exceptions Report Pane

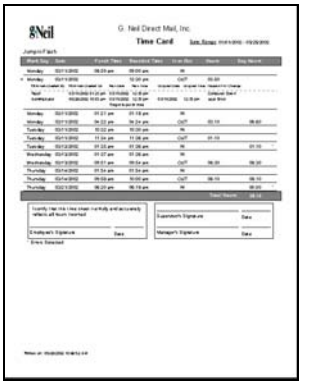


The following are other options that are available on the Punch Exceptions Report. For a list of features not listed here, please see Report Interface Features above.

Feature	Description
Report Date Range	This allows you to set a date range for the report.
Time Exceptions in hours	This allows you to report on total hours over or under by day, week, or month, and to filter on a work schedule.
Work Schedules	This allows you to filter on a selected work schedule.

Time Cards Report

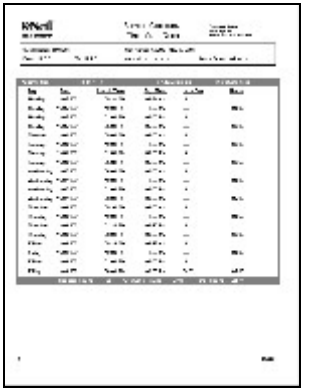
The **Time Cards Report** shows punch times and manual punch entries for each employee according to the selected work date range. Changes made to an entry can be printed along with employee and supervisor signature blocks.



NOTE: Punch entries with an asterisk (*) to the right of the entry require attention. It means that double in or out punches have been made and need corrected.

Time Card Runs Report

The **Time Card Runs Report** shows totals of regular time, overtime, and the First and Second Column descriptions for Reported Payroll Description Columns under Settings > Global Preferences > Time Clock Tab in a "column" format.



NOTE: The Time Card Runs Report will only report **regular time**, **overtime**, and the payroll descriptions for **First** and **Second Columns** under the Global Preferences > Time Clock Tab. All other reasons will fall under the "Other" column. See the **Time Card Runs (Extended)** report to view all payroll descriptions.

To print a report, follow these steps:

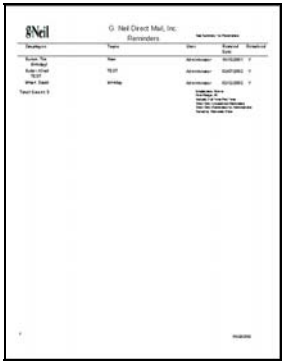
1. From the **Reports** menu, select the appropriate report.
2. Select any options necessary from the filter and options settings.
3. Under **Select a Time Card Run**, select a run. **Note:** Runs must be created through the Time Card Runs Tab.
4. Click **Preview** to see the report on the screen before printing.

Time Card Runs (Extended)

The **Time Card Runs (Extended) Report** will print regular time, overtime, and all Payroll Code Descriptions in a "row" format. If you have more than two payroll code descriptions (for example, Vacation, Sick, and Personal), this report will allow you to view all payroll code descriptions set up under **Settings > Reason Codes – Payroll Code Description**.

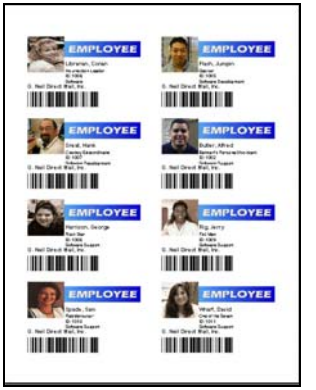
Reminders

The Reminders Report allows you to view resolved and unresolved reminders for a specific date range.



ID Badges

You may create ID Badges for use with Optima Time Clock or company identification. There are 4 types of ID Badges: Employee, Temporary, Guest or without a title.



Layout

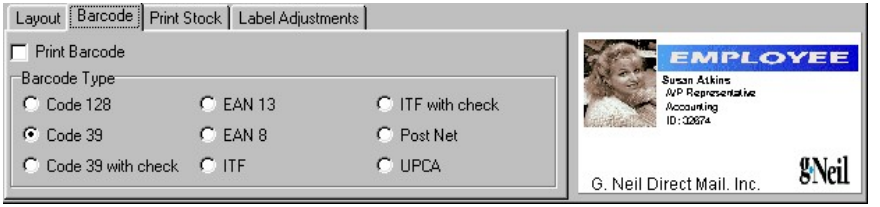
The **Layout Tab** allows you to select what features will be on the ID Badge. For example, if you want the badge title to read Guest instead of Employee, you can select Guest under the Badge Title.

ID Badges Layout Tab

Barcode

The **Barcode Tab** allows you to select the type of Barcode that will be printed. If you're not sure which type to use, we recommend keeping the default barcode type of Code 39. Optima uses the Employee ID as the Barcode number. If an employee doesn't have an Employee ID number (see Employee Detail), a barcode will not print out on the label.

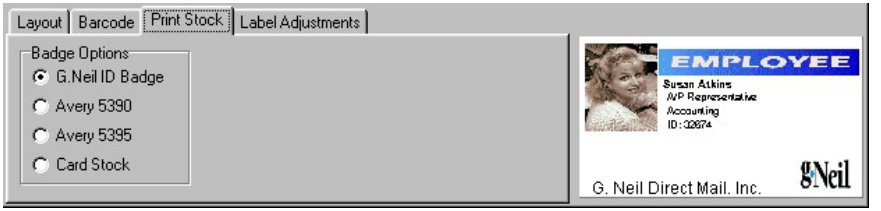
ID Badges Barcode Tab



Print Stock

The **Print Stock Tab** allows you to select the label type. The G.Neil ID Badge type can be requested through our sales team and is specifically designed to work with Optima Time Clock and Optima Confidential Employee Record.

ID Badges Print Stock Tab



Chapter 11: Database Maintenance

This chapter discusses how to maintain the Optima database through backups and regular maintenance. A **Backup** is essentially a "copy" of your employee records. Backing up ensures that you can recover from a power failure or emergency. You may also install Optima Time Clock on another computer (even as a demo) and restore from your backup.

Chapter Contents:

Backing Up

How often should you backup?

Every company is different regarding their backup needs. One thing to remember is, "it's not **if** your computer is going to crash, but **when**." They have made great strides in making computers more reliable, but that just makes the time longer before something may happen to your computer.

The following pertains to any data on your computer and not just your Optima program. Ask yourself this question, "If my computer were to crash right now, how long would it take to re-create (reenter) all of my data without a backup?" Then ask yourself, "If I had to restore from a backup, would I be okay with last week's backup, where I have to reenter a week's worth of data? Would I be okay with restoring a backup from 3 days ago?

When restoring your data, the information will only be as current as your last backup. So, if you did a backup two weeks ago and had to restore this backup, you would need to reenter the data that didn't get backed up.

Back up after you make changes to your employee records.

It is recommended that you back up your database after making any significant changes to records. For example, any time you enter several employees or input many changes to absence information would be a good time to back up. You may also set up the DB Monitor to automatically back up at assigned times.

Rotate backups and store backup copies offsite.

A good backup routine is to have at least three sets of backups covering different days of the week. This practice is called **rotation** and reduces your risk of data loss. It is also a good practice to always keep one copy offsite in case of a fire or flood. Consult your system administrator for your company policy regarding data storage.

A **Restore** is when you recover from a backup. There are three different uses for the restore feature. **A Restore may only be done through the DB Monitor**.

1. To overwrite the current data with archived data
2. To recover from a hardware crash
3. To move information onto a new computer

Please keep in mind that when you restore data, your information will only be as current as the backup you are restoring from.

IMPORTANT NOTE

The backup file may only be saved to the Server or Standalone Computer where the **database** resides. The backup creates a zipped file with an extension of .gbk.

Creating a manual backup from within Optima

To perform a manual backup from within the Optima program, follow these steps:

1. From within Optima, go to **File > Maintenance > Backup > Backup Database**.
2. If you are running the backup utility from the Server or at a local PC where the database resides (Standalone), you will have the option to select where you want to backup to. If you are running the backup utility from a Client (Optima client intall), it will automatically run the backup, saving the data where the database resides.

Creating a manual backup from within DB Monitor

To perform a manual backup from within DB Monitor, follow these steps:

1. Open the DB Monitor program by going to **Start**, **Programs, G.Neil Optima**, and clicking on **DB Monitor**.
2. Enter your login and password. If you do not have access to the DB Monitor Backup feature, you will need to see your Administrator.
3. Click the **Backup** Tab.
4. Click **Yes** to the message, **"Do you want to perform a sweep after the backup completes**?" **Note:** A Sweep is a maintenance feature that keeps the database working at peak performance.
5. Click **OK** at the Select Directory screen. It is highly recommended that you keep the default location. **Note:** You may only back up to the Server or standalone computer where the database resides.
6. Click **Close** when the backup is complete.

Scheduling Automatic Backups

To create a scheduled backup, follow these steps:

1. Open the DB Monitor program by going to **Start**, **Programs**, **G.Neil Optima**, and clicking on **DB Monitor**.
2. Enter your login and password. If you do not have access to the DB Monitor Backup feature, you will need to see your Administrator.
3. Click the Backup Tab.
4. Click **New Backup**.
5. Enter the **Backup Type** by selecting Daily, Weekly or Monthly.
6. Enter the military time when you would like the backup to take place.
7. It is recommended to keep the other default settings of Performing Sweep and the path of the backup. A different backup will be created for each scheduled backup. **Note:** The name of the backup will be: [Type]_Backup_[mm-dd-yyyy]_[time] to distinguish it from other backups. For example, Weekly_Backup_08-02-2001_2300, or Monthly_Backup_09_01_2001_1700.
8. Click **Save**. The backup will be performed within a minute of the scheduled time. **Note:** The Server or standalone computer where the database is located must be turned on for the backup to complete. If the computer is not on at the scheduled time, the DB monitor will try to create the backup the next time it is opened.

Restoring from a Backup

Remember, restoring a backup will overwrite all data in the current database. **Restore may only be run from the DB Monitor on the Server or standalone computer**. To restore, follow these steps:

1. Go to the Server where the database files are located. (Restore cannot be done from a Workstation.)
2. Open the DB Monitor program by going to **Start**, **Programs, GNeil Optima**, and clicking on **DB Monitor**.
3. Enter your login and password. If you do not have access to the DB Monitor Restore feature, you will need to see your Administrator.
4. Click the **Restore** Tab.
5. Click the database to restore.
6. Click Browse and double-click the backup you wish to restore.
7. Click Start, Restore.
8. After Restore is complete, click Hide to minimize the DB Monitor.

You may open the program to see your restored data.

DB Monitor

Go to **Start > Programs > GNeil Optima > DB Monitor**.

The DB Monitor allows you to change the Server Name and Database Path, Backup and Restore your database, view database information and clear inactive connections. It will also show you what Optima version each client computer is running. This is good to make sure everyone is on the same program versions.

Feature	Description
Settings	This allows you to change the Server Name and Database Path.
Backup	This allows you to set up a backup schedule or backup now. See above for creating a backup.
Backup History	This shows all backups completed. You will need to manually delete old backups from within Windows Explorer.
Restore	This can only be done from the same drive where the database resides. For example, if the database was located on a Server, the restore could only be done FROM the Server, not from the Client Workstation. See above for steps on restoring.
Information	This allows you to view how many users are connected to the database and where the current database is located. The Server Version information is the version of Interbase (database).
Statistics	This gives information on the database. Normally, you will not need this information.

Feature	Description
Connections	This allows you to view who is connected and any inactive connections that need to be cleared.

Clearing Connections

Go to **Start > Program Files > GNeil Optima** and select **DB Monitor**.

To clear a connection, follow these steps:

1. Make sure that all users are out of all Optima programs.
2. From the **Connections** Tab of the **DB Monitor**, click on the **Refresh** button and make sure that all Computer Names have a "N" under Active Connections.
3. Click **Clear Inactive Connections**. This will clear all connections listed with an "N" under Active Connections.

Performing Maintenance and Repairing the Database

The DB Maint is different from the DB Monitor. The DB Monitor utility allows you to view current connections, backup and restore, and view backup history. The DB Maint utility allows you to perform maintenance and attempt to repair a corrupted database.

DB Maintenance Utility

To run the DB Maint utility, go to **Start > Programs > Gneil Optima > Maintenance > DB Maint**.

The **DB Maint** utility allows you to perform the following:

1. Perform periodic maintenance on the database to keep it at top performance.
2. Attempt to repair the database when corrupted.

Maintenance

We recommend that you periodically perform maintenance on the Optima database (about once a month) by running the Optima maintenance utility called DB Maint. DB Maint will perform some maintenance procedures on the Optima database to keep it running at top speed.

CAUTION: The DB Maint should not be used as a replacement for a good backup schedule. The database may become corrupted beyond repair that can be quickly recovered by a current backup. We strongly encourage running backups within Optima or DB Monitor, even if the database is on a Server that gets the whole drive backed up daily or on a Standalone computer.

Database Repair

If you can't open the Optima program, we recommend running the DB Maint utility. It will attempt to repair a corrupted database. If the utility does not repair the database, please save screenshots of the error messages and contact G.Neil Tech Support.

Running the DB Maint Utility

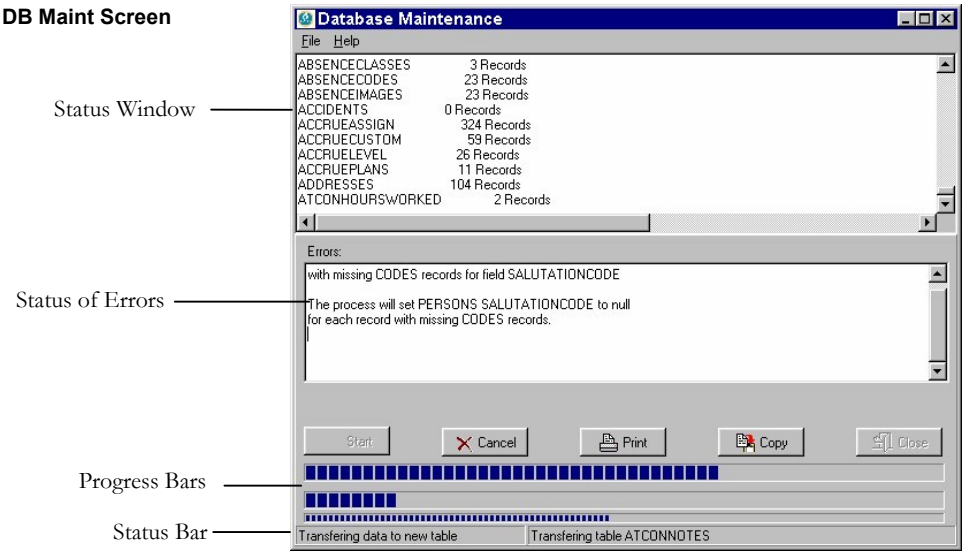
Whether performing monthly maintenance or attempting to repair the database, you would follow the same steps to run the DB Maint utility.

1. Go to **Start > Programs > Gneil Optima > Maintenance > DB Maint**.
2. After clicking on **DB Maint**, click on **Start** to run the utility program.
3. After the utility finishes, click **Close** to exit.
4. Open the Optima program.

NOTE: The DB Maint may take several minutes to run, especially on large databases. Please be patient.

CAUTION: Running the DB Maint utility requires exclusive use; everyone must be out of any Optima programs. Any changes made to system during the running of the DB Maint utility will be lost.

DB Maint Screen



DB Maint Features

The DB Maint utility has the following features:

Features	Description
Start	Begins the maintenance or repair.
Cancel	Stops the maintenance or repair process.
Print	Prints the error message(s). The **Print** button will not appear unless there are errors.
Copy	Copies the error message(s) to the clipboard. This will allow you to paste it into an email. The **Copy** button will not appear unless there are errors.
Close	Exits the DB Maint utility.

NOTE: The DB Maint utility will attempt to repair the database that the hrware.ini file points to. (Go to **Start > Run**, and enter: **hrware.ini**. Locate [HRWARE] in brackets and see the Server name and Path for the directory of the Optima database.)

Chapter 12: Using Custom Reports

This chapter will introduce you to all the tools for creating and editing custom reports. See Appendix C for tutorials on Modifying a Custom Report (page 175) and Creating a Custom Report from Scratch (page 181).

Chapter Contents:

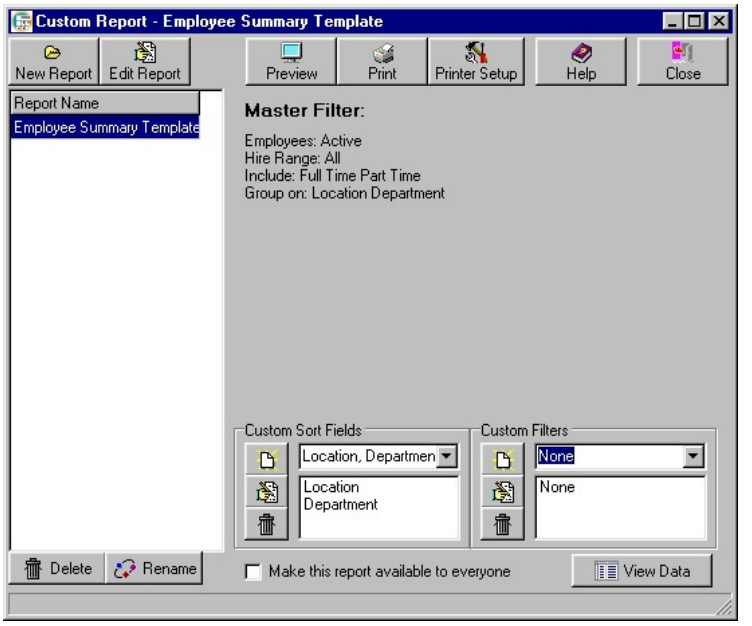
Overview

Optima Time Clock includes an enhanced custom-reporting tool called Report Runner. Report Runner allows you to customize most of the reports that are currently included with Optima Time Clock and lets you create your own reports from scratch. **Note: See Appendix C for a tutorial that will walk you through editing and creating reports.**

You may access Custom Reports by following these steps:

1. Click the report you would like to customize. For example, from the **Reports** menu, select **Employee Summary**.
2. From the report interface window select **Custom Reports**. This will bring up the custom report interface.

Custom Report Interface



Above is the custom report interface. Each portion of this screen is described below.

Feature	Description
Report Name	Shows the name of the template. The type of report that is currently in effect is "Employee Summary." All custom reports created and/or modified will have access to data specifically designed for the selected report.
Master Filter	This shows the settings carried over from the main report screen. All filters EXCEPT the **Show Social Security Number on Report** and **Disable Headers on Export** will come over.
Action Buttons	a. **New** – This creates a new report; the "create new report" wizard will start. b. **Edit** – The selected report will be loaded into the report designer screen. c. **Preview** – This allows you to view the report before printing. d. **Print** – This allows you to print the selected report. e. **Printer Setup** – This allows you to change your printer settings. f. **Help** – This displays the help for this screen. g. **Close** – This exits Custom Reports and returns to Optima Time Clock.
Other Buttons	a. **Delete** – This deletes custom reports that have been created. You may not delete the master template. b. **Rename** – This allows you to rename custom reports that have been created. You may not rename the master template. c. **Make this report available to everyone** – If this box is checked, this will allow the report to be available to other users logging into the program. Otherwise, only the person creating the report will see it. d. **View Data –** This will show the data that you have selected according to the filter and sort settings.

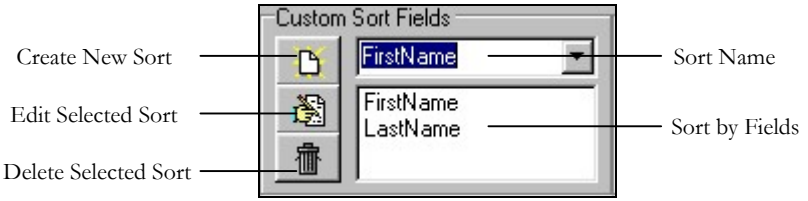
Sort and Filters

From the custom report interface, you have the option to select which fields you want to sort and filter on.

Sorting allows you to group by a specific field. Fields are referred to as data, such as Last Name, First Name, Date of Birth, Location, Department, etc. You may create a sort by Last Name, First Name or any other available fields.

Filters allow you to separate out specific fields on the report. For example, if you only wanted to view employees from a specific department, you could create a filter for this and only those employees from the department you specified will show up on the report.

Custom Sort Fields



To create a new custom sort, follow these steps:

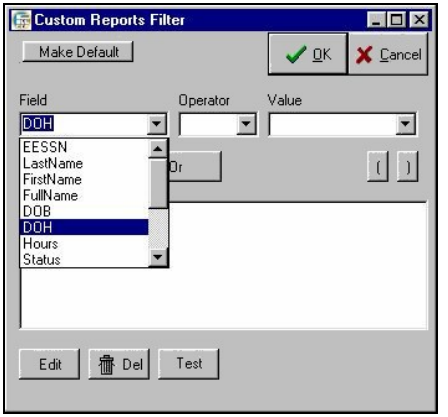
1. Select a report from the Reports menu.
2. Click Custom Reports.
3. Select the appropriate report or click New to create your own.
4. Click the **NEW**  button under the Custom Sort Fields.
5. Enter a name that will designate what type of sort this will be, such as Last Name or SSN. Click **OK**.
6. Select which field(s) you want to sort on by either double clicking on the field or clicking once on it and clicking the right arrow button. The sort order will be designated by which field is at the top. For example, if you have selected to sort on the Last Name and EESSN fields, with the Last Name field at the top, it will sort first by Last Name and then by SSN on the report. You may change the order of the fields by clicking on the UP and DOWN buttons.
7. Click **MAKE DEFAULT**. This keeps the sort settings assigned to the selected report.
8. Click **OK**.
9. See below for setting up custom filters.
10. Click **EDIT** or **PREVIEW**.

See Appendix C for a tutorial that will walk you through editing and creating reports.

Custom Filters

This feature allows you to filter on one or more fields. The filter drop-down box allows you to select saved filter settings.

Custom Filter Screen



Feature	Description
Field	This allows you to select the field to filter on. **NOTE:** These are the only fields allowed.
Operator	a. = equal to b. > greater than c. >= greater than or equal to d. < less than e. <= less than or equal to f. <> not equal to
Value	This allows you to enter a field name to filter on.
AND	This enters the statement. Click "AND" or "OR" after each statement you create.
OR	This allows you to set an OR statement (this OR that).
( )	This allows statements that need to be done first such as in Math calculations (a+b)-c.

Feature	Description
Edit	This allows you to edit a line.
Del	This allows you to delete a line.
Test	This will check for correct syntax. **NOTE:** This only checks to see if the syntax is correct. It does not check to see if the syntax will work correctly.
Make Default	This makes this filter the default filter for the selected report.

To create a new custom filter, follow these steps:

1. Select a report from the main menu.
2. Click Custom Reports.
3. Select the appropriate report or click New to create your own.
4. Click the NEW button next to Custom Filter.
5. Enter a name that will designate what type of filter this will be, such as SSN. Click OK.
6. Click the drop-down arrow for Field and select a field to filter on.
7. Click the drop-down arrow for Operator and select the type of filter.
8. Click the drop-down arrow for Value and enter a value.

Example: Select "LastName" for the Field, select "=" for the Operator, and enter "A*" for the Value. After clicking "Make Default" and OK, when the report is previewed, it will show all names that start with the letter "A".

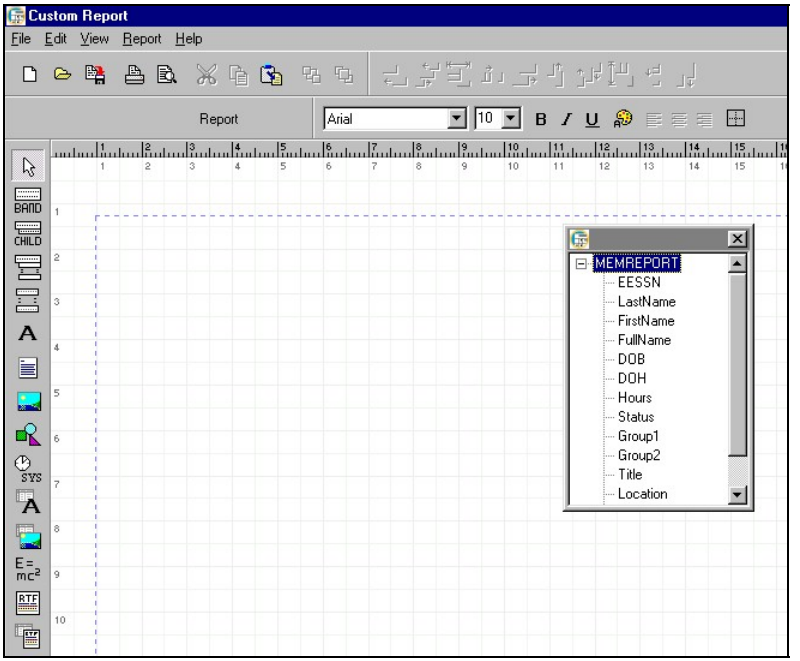
9. Click "AND" to set the query. This will bring it into the window.
10. Set any other queries as needed.
11. Click Make Default.
12. Click OK.
13. Click Preview to show your settings.

TIP: If you have several lines in a query and you delete the first one, make sure the top one doesn't begin with **AND**.

Edit/Design Screen

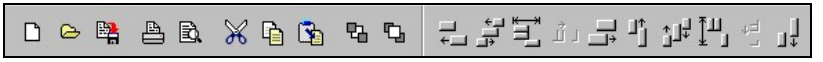
You can create your own customized report from the data provided for each report type by clicking on the **New** button from the Custom Reports main window. When the design screen appears, you are presented with the Report Wizard. The report wizard walks you through the process of creating a basic report. If you wish to learn how to create your own report, a step-by-step guide to creating a report from scratch is provided in Appendix C (Custom Report Tutorial # 2).

Custom Reports Design Screen



The above picture shows Custom Reports' main design screen. This is the screen where you will be modifying or creating custom reports. The toolbars are described in detail below:

Toolbars

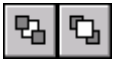


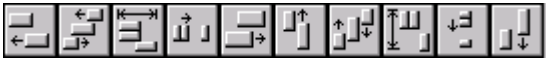
You can change many report element properties directly with the toolbar instead of using the element's property dialog. Additionally, you can use it to modify multiple elements at once.

 These buttons are for creating a new report and saving a report.

 Use these buttons to print the report or to view print preview.

 With these buttons, report elements can be cut to, copied to or pasted from the report designer's clipboard.

 These buttons are used to set a report element to the background or bring it in front of all other report elements, in case of overlapping elements.

 Report elements can be arranged with these buttons. Some of the buttons are only enabled when multiple elements are selected (for example to align the left edges).

Here you can set font and font styles of the selected report elements (font name, font size, bold, underline, italic).

 These buttons are for aligning text within a report element. Text can be aligned left, right or centered. Of course this only makes sense if the report element's size is bigger than its text and if "autosize" is deactivated.

 With this button, you can open a dialog to set the frame options for the selected element.

These buttons run down the left side of the design screen.

Report Elements

Each button is used for adding report elements to the report. To add an element to the report, you must click its button and then click on the report where you want the element to be inserted. Of course you can still move a report element to another position later.

Standard Report Bands

All standard report bands are added with the same button (see above). The band type is selected with the band's property dialog.

The following band types are available:

- **Title:** The title band will be printed on the first page of the report as a report title.
- **Page header:** The page header is printed at the top of each report page.
- **Column header:** The column header is used with reports that have multiple columns (can be set with "Report|Options").
- **Detail:** The detail band is the most important report band. It is printed once for each data record from the main report table.
- **Group footer:** The group footer is printed at the end of a group, before a new group starts. You can find more information on groups at the chapter describing the **group band**.
- **Summary:** The summary band is printed at the end of the report, after all data records have been printed.
- **Page footer:** The page footer is printed at the bottom of each report page.

Report Band

The band properties for these bands are all set with the same property dialog. The following options are available:

Type: Band type (See above.)

Color:
This defines the background color of the report band.

Print:

- **not on first page:** prints the band only on the second page and following
- **not on last page:** suppresses printing of the band on the last report page
- **even-page numbers only:** only prints the band on even-page numbers
- **odd-page numbers only:** only prints the band on odd-page numbers
- **at bottom of page:** moves the band to the bottom of the page before printing it
- **force new page:** starts a new page before printing the band

- **force new column**: starts a new column before printing when using reports with multiple columns

Only print band if expression is true:

An expression can be used to determine whether the band should be printed or not. The expression must have a logical result of "true" or "false." Press the button on the right side of the expression edit line to use the expression expert.

Frame:

A frame or single frame line can be drawn around the report band. You can select which lines should be drawn, in which color, style and width.

Child Band

A child band is a band which is attached to another report band and which will always be printed below its parent band. This way you can print an additional band after each detail band, for example. The advantage of using child bands instead of just resizing the parent band to make room for more report elements is that there can be a page break between a band and its child, if needed, and the child band can be printed independently from its parent band, even if the parent band is not printed.

You must use child bands if you have report elements with "Autostretch" set to true and you want to print element below such auto-resizing fields. In this case, place all the elements that should be moved down automatically because of autostretching elements before them on a child band.

The following options are available:

Parent Band: The band to which the child band is attached.

Color:

This defines the background color of the report band.

Print:

- **not on first page:** prints the band only on the second page and following
- **even-page numbers only:** only prints the band on even-page numbers
- **odd-page numbers only:** only prints the band on odd-page numbers
- **at bottom of page:** moves the band to the bottom of the page before printing it
- **force new page:** starts a new page before printing the band
- **force new column**: starts a new column before printing when using reports with multiple columns

Only print band if expression is true:
An expression can be used to determine whether the band should be printed or not. The expression must have a result of "true" or "false." Press the button on the right side of the expression edit line to use the expression expert.

Subdetail Band

A subdetail band is a sort of detail band, but it is subordinate to the real detail band. For example, if you want to print a list of audio CDs, and for each CD a title list should be printed, you would use a detail band for printing the CD names and connect a subdetail band to the titles dataset, so separate lists of titles are printed below each CD name.

The following options are available for the subdetail band:

Table:
This is the dataset that is used by the subdetail band.

Color:
This defines the background color of the report band.

Master:
The master is the table superior to the subdetail table. For each record in the master table a subdetail list is printed.

Only print if expression is true: see **Standard bands**.

Print

- **Before master-detailband:** prints the subdetail records before printing their master record from the detail band
- **At bottom of page:** moves the band to the bottom of the page before printing it
- **Print header/footer even if dataset is empty:** header and footer bands of the subdetail band will be printed even if there are no subdetail data records to print
- **Force new page:** starts a new page before printing the band
- **Force new column**: starts a new column before printing the band (when using reports with multiple columns)

Headerband:
This band is printed as a header before the subdetail data records are printed.
Footerband:
This band is printed as a footer after the subdetail data records have been printed.

Frame: see Standard bands.

Group Band

A group band is used to structure data into groups of data records. For example, if you want to print a list of addresses, you can add some space before each new first letter starts and insert some caption, or you can group addresses by city or state.

Example

Internally, groups are handled the following way: Before printing a data record, the report engine checks if the expression result of the group band is different from the last data record's expression result. If this is the case, the group band will be printed, or else it won't. This way data can be grouped with great flexibility, because you can use the expression for nearly any kind of calculation.

The following options are available:

Master:
Defines which is the master band for the group. This can be either the detail band or a subdetail band. The group is checked each time the master band is printed.

Color:
This defines the background color of the report band.

Expression:
This **expression** determines whether a group band is printed or not. The band will be printed each time the result of the expression changes.

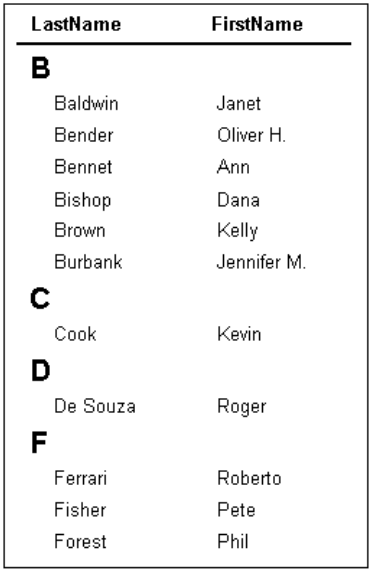
Print

- **at bottom of page:** moves the band to the bottom of the page before printing it
- **force new page:** starts a new page before printing the band
- **force new column**: starts a new column before printing when using reports with multiple columns

Footerband:
This band is printed at the end of each group, before the next group band is printed.

Frame: see **Standard bands**.

The following picture shows a report with a group band (the bold printed single character is located on the group band) and a report without a group band on the right side.



LastName	FirstName
B	
Baldwin	Janet
Bender	Oliver H.
Bennet	Ann
Bishop	Dana
Brown	Kelly
Burbank	Jennifer M.
C	
Cook	Kevin
D	
De Souza	Roger
F	
Ferrari	Roberto
Fisher	Pete
Forest	Phil

LastName	FirstName
Baldwin	Janet
Bender	Oliver H.
Bennet	Ann
Bishop	Dana
Brown	Kelly
Burbank	Jennifer M.
Cook	Kevin
De Souza	Roger
Ferrari	Roberto
Fisher	Pete
Forest	Phil
Glon	Jacques
Green	T.J.
Guckenheimer	Mark
Hall	Stewart
Ichida	Yuki

Elements and Fields

Label

A label is for printing static text, i.e., text that is printed exactly like it is displayed during report design.

The following options are available:

Text:

This is the text that should be printed. You can only type in one line of text. **Memos** can be used for multi-line text.

Rotation:

Use this to rotate your text. Rotation can be set to anything between 0 and 360 degrees. 90 degrees means displaying the text vertically, for example.

Font:

Selects the font for the report element.

Color:

Defines the background color for the report element (the font color can be set with the "Font" button).

Alignment:
The report element's text can be aligned left, right or centered.

Automatic word-wrap:
Set this option if you want the text to wrap to the next line if it does not fit into the given width (similar to a word processor software).

Transparent:
The report element's background will not be printed if this option is activated. This way you can place text on top of an image, for example, without hiding the image under a white box with text.

Autosize width:
This option resizes the report element to make room for its complete text. If "Autosize" is not set and the text is larger than the element size, text will be clipped off.

Autostretch height:
This option is for report elements with multiple lines, e.g., memo fields. The height of the elements will be stretched to make room for all lines. If needed, the report band will be stretched too.

Memo

A memo is used to print text that has more than one line. Just like a label a memo displays text in one color and font. If you want to use formatted text, you can use a Richtext field.

The following options are available:

Text:
This is the text that will be printed.

Font:
Selects the font for the report element.

Color:
Defines the background color for the report element (the font color can be set with the "Font" button).

Alignment:
The report element's text can be aligned left, right or centered.

Automatic word-wrap:

Set this option if you want the text to wrap to the next line if it does not fit into the given width (similar to a word processor software).

Autosize width:

This option resizes the report element to make room for its complete text. If "Autosize" is not set and the text is larger than the element size, text will be clipped off.

Autostretch height:

This option is for report elements with multiple lines, e.g., memo fields. The height of the elements will be stretched to make room for all lines. If needed, the report band will be stretched too.

Image

An image element is a bitmap from a BMP file that is inserted into the report.

While a datafield is for displaying text from a database record, you can use this report element to display images that are stored in a database.

The following options are available:

Datafield:

The field that contains the image (if there is no bitmap in this field, nothing will be printed). If the datafield property is set to a database field which is not of type "bitmap," the report engine will try to find a bitmap file whose name equals that of the data field's content and load it.

Stretch picture automatically:

Activate this option to stretch the picture so it fits exactly into the report element's size, or else the picture will be cut off if there is not enough room, or space will be left empty if there is too much.

Center picture:

If the report element is bigger than the picture and the "Stretch" option is not activated, the picture will be centered in the report element instead of being placed in the top left corner.

Alignment:

Aligns the image on the report band.

Shape

This report element can be used to draw (horizontal or vertical) lines, circles and rectangles.

The following options are available:

Type:
Selects the shape, which can be a circle, rectangle, horizontal line, vertical line or top/bottom and left/right lines.

Brush:
- **Style:** different styles to fill a circle or rectangle
- **Color:** the color that is used to fill the shape

Pen:
Width: line width of the shape
Mode: various line drawing modes
Style: solid, dotted or dashed lines

System Field

This report element is used to display various system data like current time or date, page number, etc.

Available options:

Text:
This text will be displayed before the actual system data. For example you can use the text "Report printed on:" when printing the current date.

Type:
The type of system data to print. The following types are available:
- **Date:** the current date when printing the report
- **Time:** the current time when printing the report
- **Date/Time:** the current date and time
- **Detail count:** total number of data records
- **Detail number:** number of the current data record
- **Page number:** current page number of the printout
- **Report title:** the report title which can be set via "Report|Options"

Autosize width:
This option resizes the report element to make room for its complete text. If "Autosize" is not set and the text is larger than the element size, it will be clipped off.

Transparent:
The report element's background will not be printed if this option is activated. This way you can place text on top of an image, for example, without hiding the image under a white box with text.

Font:
Selects the font for the report element.

Color:
Defines the background color for the report element (the font color can be set with the "Font" button).

Data Field

A datafield displays data from the report table. This can be numerical data, characters or multiple lines of text.

The following options are available:

Data field:
Select the data field you want to print.

Alignment:
The report element's text can be aligned left, right or centered.

Format:
Numerical data fields can be formatted by setting a **format definition**.

Font:
Selects the font for the report element.

Color:
Defines the background color for the report element (the font color can be set with the "Font" button).

Automatic word-wrap:
Set this option if you want the text to wrap to the next line if it does not fit into the given width (similar to a word processor software).

Transparent:
The report element's background will not be printed if this option is activated. This way you can place text on top of an image; for example, without hiding the image under a white box with text.

Autosize width:
This option resizes the report element to make room for its complete text. If "Autosize" is not set and the text is larger than the element size then text will be clipped off.

Autostretch height:
This option is for report elements with multiple lines, e.g., memo fields. The height of the elements will be stretched to make room for all lines. If needed, the report band will be stretched too.

Suppress printing of repeated values:
Activate this option if you do not want to print data fields with the same values repeatedly. The report engine will only print the data field for the first data record, and leave all following prints of this data field empty if the field's content hasn't changed.

Suppress printing if value of data field is 0:
This option suppresses printing of numerical fields if their value equals zero.

Reprint on new page:
If you have activated "Suppress printing of repeated values", you can use this option to reprint a field if a new page starts, even if it would be suppressed normally because of equal values.

Reprint on new group:
Same as "Reprint on new page" but for groups.

Image from Data Field

While a data field is for displaying text from a database record, you can use this report element to display images that are stored in a database.

The following options are available:

Data field:
The field that contains the image (if there is no bitmap in this field, nothing will be printed). If the data field property is set to a database field which is not of type "bitmap," the report engine will try to find a bitmap file whose name equals that of the data field's content and load it.

Stretch picture automatically:
Activate this option to stretch the picture so it fits exactly into the report element's size, else the picture will be cut off if there is not enough room, or space will be left empty if there is too much.

Center picture:
If the report element is bigger than the picture and the "Stretch" option is not activated, the picture will be centered in the report element instead of being placed in the top left corner.

Alignment:
Aligns the image on the report band.

Expression Field

A calculated field (expression field) is used for displaying text or data that is calculated by an expression or formula. You can do numerical calculations, string manipulations, concatenate data fields and much more.

Expression:
This expression is evaluated each time the calculated field is going to be printed (see the chapter on **expression syntax**).

Format:
Numerical fields can be formatted by setting a **format definition**.

Font:
Selects the font for the report element.

Color:
Defines the background color for the report element (the font color can be set with the "Font" button).

Master:
If your expression uses any **aggregated functions**, you must link the "Master" property to the dataset that will be used to update the expression. Each time a new data record from this dataset is selected, the expression will be recalculated.

Alignment:
The report element's text can be aligned left, right or centered.

Rotation:
Use this to rotate your text. Rotation can be set to anything between 0 and 360 degrees. 90 degrees means displaying the text vertically, for example.

Autosize width:

This option resizes the report element to make room for its complete text. If "Autosize" is not set and the text is larger than the element size, text will be clipped off.

Autostretch height:

This option is for report elements with multiple lines, e.g., memo fields. The height of the elements will be stretched to make room for all lines. If needed, the report band will be stretched too.

Reset after print:

If you are using calculations like sums or counting of data record etc., you can use this option to reset the value of the calculation to zero after the report element has been printed.

Automatic word-wrap:

Set this option if you want the text to wrap to the next line if it does not fit into the given width (similar to a word processor software).

Transparent:

The report elements background will not be printed if this option is activated. This way you can place text on top of an image, for example, without hiding the image under a white box with text.

Richtext Field

The richtext element is a report element that can display multi-line text with different fonts, colors and formatting. In the richtext property dialog, press the Edit button to show a text editor with richtext editing capabilities.

Alignment:

Sets the text alignment if no alignment has been set with the editor.

Font:

Sets the font if no font has been specified with the editor.

Color:

Sets the text color if no color has been set with the editor.

Autostretch height:

This option is for report elements with multiple lines, e.g., memo fields. The height of the elements will be stretched to make room for all lines. If needed, the report band will be stretched too.

Richtext from Data Field

This report element displays richtext from a data field. The following options are available:

Data field:
Select the data field to use by the report element.

Alignment:
Sets the text alignment if no alignment has been set with the editor.

Font:
Sets the font if no font has been specified with the editor.

Color:
Sets the text color if no color has been set with the editor.

Autostretch height:
This option is for report elements with multiple lines, e.g., memo fields. The height of the elements will be stretched to make room for all lines. If needed, the report band will be stretched too.

Keyboard and Mouse Shortcuts

The report designer can be used with the mouse most of the time. Some functions can also be accessed with the keyboard:

Enter:
Show the element's property form.

Cursor keys:
Move a report element.

Shift + Cursor keys:
Resize a report element.

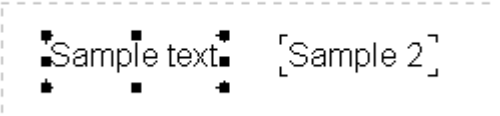
Del:
Delete a report element.

Tab and Shift + Tab:
Select next or previous report element.

Using the mouse

Select a report element:

Report elements are selected by clicking them with the left mouse button. A selection is shown with eight small black boxes around the element:

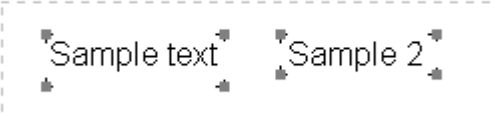


Change the size of an element:

You can use the small boxes of a selected element to change its size. If the mouse cursor is positioned over such a box, the cursor will change to show in which direction the mouse can be moved while the left mouse button is pressed down. The element will be resized accordingly. Please note that for report bands only the height can be changed, but the width is set to the report width automatically.

Select multiple elements (a):

You can select multiple elements by holding down the [Shift] key while selecting them with the left mouse button. This way the previous selection will remain when a new element is selected.



Select multiple elements (b):

You can also select multiple elements by using a so-called "rubber band." Hold down [Ctrl] together with the left mouse button and drag a frame around the elements that you want to select. After releasing the mouse button, all elements within the frame are selected.

Move elements:

You can move report elements with the left mouse button. Hold down the button, drag the element to the desired location and release the mouse button. Report bands cannot be moved because they are positioned automatically according to their band type.

Move and resize elements regardless of the current grid setting:

If you want to manipulate a report element regardless of the current grid (menu item "View|Options") and move or resize by one pixel, then hold down the [Shift] key while moving the mouse.

Edit element properties:

If you double-click a report element with the left mouse button, or if you select "Edit" from the element's popup menu (which can be accessed with the right button), a dialog will be shown where all element properties can be edited.

Script Language Guide .....

Custom Reports comes with an integrated script language for creating "BeforePrint" and "AfterPrint" event handlers at runtime. You can use it to design reports with various special features and advanced calculations.

As a simple example, let's say that you have a report printing a list of numbers, some of which may be positive and some negative. Suppose you would like the positive numbers to appear in Black and the negative numbers to appear in Red. For this you can write a script for the detail band's "BeforePrint" event from within the report editor (right-click on the band after you have selected it and choose "Scripts" from the popup menu):

You would enter the following in the "BeforePrint" window:

```
if (Amount>=0)
  SetFontColor('AmountDBText',Black)
Else
  SetFontColor('AmountDBText',Red)
Endif
```

The above script will be executed before each line is printed. 'AmountDBText' is the name of the text component which is linked to the Amount field in the dataset. It is important to note that each component on the report must be given a name if you wish to access it through a script. To give a component a name, right-click on the component after you have selected it and choose "options." The first field displayed is Name. This is where you would enter a name for the component. The name that is entered here is what you must use to access the component in script code.

Variables

Using Variable in Script Language

Variables are declared, set and get with functions. Variables are global, i.e., you can set a variable in one event handler script and use it in another. You can even set a variable in one report and use it in a second report executed afterwards. Variables are not initialized to some value when a report is generated.

SETVAR

To set a variable, use the SETVAR function with variable name and variable value as parameter. SETVAR automatically creates a new variable if it doesn't exist, or else it will overwrite the value of the given variable.

SETVAR('Temp','This is a test string')

SETVAR('Num',1000)

SETVAR('Flag1',TRUE)

GETVAR

To get a variable value, use the GETVAR function with the variable name as parameter. The result type of GETVAR depends on what kind of variable (string, number, boolean) has been created/set with SETVAR.

```
GETVAR('Temp')

IF (GETVAR('NUM')>0)
  RETURN(FALSE)
  EXIT
ENDIF

SETVAR('Num',GETVAR('Num')+1)

SetStringProp('QRLabel1',GETVAR('Temp')+' !!!')
```

VAREXISTS

To check if a variable exists (i.e., has been created with a first call of SETVAR), use the VAREXIST function with the variable name as parameter.

```
IF (VAREXISTS('Flag1'))
:
:
ENDIF
```

DELETEVAR

To delete a variable from memory, use the DELETEVAR function with the variable name as parameter. VAREXISTS will return FALSE for this variable afterwards.

```
DELETEVAR('Temp1')
```

Script Language Syntax Guide

IF...ELSE...ENDIF:

```
IF (Condition)
:
ENDIF

IF (Condition)
:
ELSE
:
ENDIF
```

Note that between the "IF" and "(Condition)" there MUST be a blank. Do not place commands on the same line as the IF statement, but only on new lines.

"Condition" can be any script code expression returning TRUE or FALSE, e.g., "IF (Weight>10)".

The lines below the IF statement until ENDIF or ELSE are the commands to be executed if "Condition" evaluates to TRUE.

Examples:

```
IF (Amount*1.16>800)
  OKBox('Warning: Amount including VAT is larger than 800')
ENDIF

IF (YesNoBox('Print report now?'))
  RETURN(TRUE)
ELSE
  RETURN(FALSE)
ENDIF
```

LOOP...ENDLOOP

```
LOOP
:
```

ENDLOOP

You can place expression commands between LOOP and ENDLOOP, and when reaching the ENDLOOP statement, the script will start again at the line below LOOP. You can exit the loop only by using the BREAK or BREAKLOOP commands (see below).

Example:

```
SetVar('Temp',1);
LOOP
  SetVar('Temp',GetVar('Temp')+1);
  IF (GetVar('Temp')>10)
    BREAKLOOP
  ENDIF
ENDLOOP
```

BREAK

BREAK has no parameters; it just exits from the current IF or LOOP block instantly, continuing with the commands following the ENDIF or ENDLOOP statement. Note that in the above example, break would only exit from the IF statement, not from the loop.

BREAKLOOP

This is the same as BREAK, only that it exits from the current loop, no matter if BREAKLOOP is used from within one or more IF blocks.

EXIT

EXIT has no parameters. It just completely exits the script execution instantly.

RETURN

RETURN(Expression)

RETURN sets the current scripts result (a result is needed for the BeforePrint event: TRUE to confirm printing of the current band, FALSE to skip printing the band). "Expression" must evaluate to TRUE or FALSE.

Example:

RETURN(FALSE)

RETURN(Weight>10)

The second example would only print the band if the WEIGHT data field value is greater than 10.

ElementExists(Name: String): Boolean
Checks if a report element with the given name exists.
Example: ElementExists('Label1')

SetBoolProp(ComponentName, PropertyName, PropertyValue)
Sets a boolean property for a component.

Example: SetBoolProp('Childband1','Enabled',False)
SetBoolProp('MyShape','Enabled',True)

SetIntProp(ComponentName, PropertyName, PropertyValue)
Sets a numeric property for a component.
Example: SetIntProp('Band1',Height,200)

SetFloatProp(ComponentName, PropertyName, PropertyValue)
Sets a floating point property for a component.

SetStrProp(ComponentName, PropertyName, PropertyValue)
Sets a string property for a component.
Example: SetStrProp('Label1','Caption','This is a test')

GetBoolProp(ComponentName, PropertyName, PropertyValue): Boolean
Reads a boolean property from a component.
Example:
IF (GetBoolProp('DBText1','Enabled))
SetColor('DBText1',Black)
ENDIF
GetIntProp(ComponentName, PropertyName): Integer
Reads a numerical property from a component.

Example: SETVAR('LastBandHeight',GetIntProp('DetailBand','Height'))

GetFloatProp(ComponentName, PropertyName): Float
Reads floating point property from a component.

GetStrProp(ComponentName, PropertyName,): String
Reads a string property from a component.

Example: GetStrProp('Expr1','Caption')

OkBox(Text: String)
Shows a message dialog with the given text and an OK button.

Example: OkBox('Fasten your seat belts')
OkCancelBox(Text: String): Boolean
Shows a message dialog with the given text and both an OK button and a CANCEL button. Returns TRUE if the OK button has been pressed, FALSE otherwise.
Example:

```
IF (OkCancelBox('Print now?'))
  Return(True)
ELSE
  Return(False)
ENDIF
```

YesNoBox(Text: String): Boolean
Same as "OkCancelBox" but with "Yes" and "No" buttons.

InputBox(Title, Text, VariableName): Boolean
Shows an input dialog. The user must type in a value that is stored in the given variable.

Example: InputBox('Input start date','Start date:','VDate')

SetColor(Name, Color)
Sets the (background) color of the given report element. The color parameter is a numerical value, but the following constants are available: Black, Maroon, Green, Olive, Navy, Purple, Teal, Gray, Silver, Red, Lime, Blue, Fuchsia, Aqua, White. You can also use the RGBCOLOR function (see below).

```
Example:   SetColor('Childband2',Yellow)
           SetColor('Childband2',87123)
           SetColor('Childband2', RGBColor(255,0,128))
```

RGBColor(Red, Green, Blue): Integer

This function creates a color value for use with SETCOLOR and SETFONTCOLOR from red, green and blue parts.

Example: RGBColor(64,0,0) (gives a dark red)

SetFont(ComponentName, FontName)
Sets the font for a given component.

Example: SetFont('Label1','Arial')
SetFontColor(ComponentName, Color)
Sets the font color for a given component. Please see the description of SETCOLOR above.

SetFontSize(ComponentName, Fontsize)

Sets the font size for a given component.

Example: SetFontSize('TitleLabel',24)

SetFontStyle(ComponentName, IsBold, IsItalic, IsUnderline, IsStrikeout)
Sets the font style (bold, italic, underline and strikeout) for a given component. Each style is a boolean (true/false) parameter that must be set to TRUE for activating it.

Example: SetFontStyle(DBText1,true,false,false,false)

Script Code Examples

Displaying column totals
Probably the most common use for the script code is to total a column. To accomplish this is quite easy. Follow these steps to total a column. This example assumes you have at least the following bands on your report: title or column header band, detail band, summary or group footer band.

Add the following code to the "BeforePrint" event of the title or column header band:
SETVAR('COLUMNTOTAL', 0)
The above line simply creates a variable named COLUMNTOTAL and sets it to 0.
Add the following code to the "BeforePrint" event of the detail band:
SETVAR('COLUMNTOTAL', GETVAR('COLUMNTOTAL') + Table1.COST)

The above line does the following: Sets the variable COLUMNTOTAL equal to itself plus the COST field of Table1 (Table1 is the generic name of all Custom Reports datasets). The above line of script code will execute once for every line of data in the

dataset. Because of this, it keeps adding the cost to the running total of the COLUMNTOTAL variable.

The next step is simply to display the COLUMNTOTAL variable in the summary or group footer band. Add an Expression field component to either the summary or group footer band. Add the following code to the Expression field:

GETVAR('COLUMNTOTAL')

The above line simply returns the value stored in COLUMNTOTAL and it is displayed in the summary or group footer band.

Displaying Row Totals

Displaying totals across rows is somewhat easier than column totals and requires script code to be added to only one event: the detail band. Begin by adding the following line of code to the "BeforePrint" event of the detail band:

SETVAR('ROWTOTAL', Table1.VALUE1 + Table1.VALUE2 + Table1.VALUE3)

Substitute VALUE1, VALUE2, VALUE3 with the names of the fields you wish to add. If you want to add more or less than 3 fields, simply continue the same pattern as shown above.

The above line declares a variable named ROWTOTAL and sets it equal to the sum of VALUE1 + VALUE2 + VALUE3. The variable now contains the proper total that needs to be displayed. Remember that any code added to the detail band will fire once for every record in the dataset. The above line of code will add the three fields for each record. Add an Expression field component to the detail band. Add the following code to the Expression field:

GETVAR('ROWTOTAL')

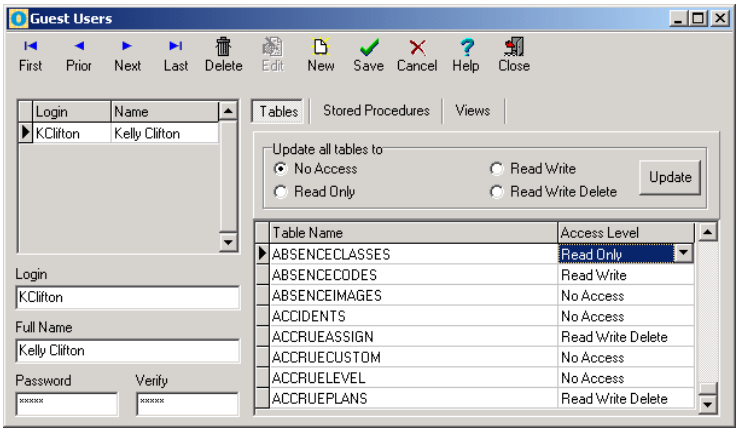
The above line simply returns the value stored in ROWTOTAL and it is displayed in the detail band.

See Appendix C for tutorials on editing a template, and creating a report from scratch.

Creating Reports Through Other Software

You may create reports through other report writer software, such as Crystal Reports (sold separately.) In order to do so, you will need to set up a guest user account. A guest user account will allow access to specific tables within the database.

Guest User Account



Setting up a Guest User

To set up a Guest User account, follow these steps:

From within the program, click **Settings**, **Guest Users**.

1. Click **New**.
2. Enter a **Login Name**.
3. Enter the users **Full Name**.
4. Enter a **Password**. Then enter it again to verify the password.
5. Select the Table Name for the user to have access to and click in the Access block where it has "No Access". For example, to give Read, Write, Delete access to AbsenceClasses, click on "No Access", then click on the down arrow and select Read, Write Delete.
6. Follow step 5 to set up access to each table with the appropriate access.
7. Click **Save**.
8. Clicking **Edit** will allow you to make changes to the record.

Once guest user access is set up, the user may connect to the Optima database through other report writer programs. The report writer must have an ODBC driver that is compatible with Interbase 6 Dialect 3. (We recommend EasySoft's ODBC-Interbase 6 Driver, available at www.easysoft.com.)

Chapter 13: Importing and Exporting Data

The Optima programs allow you to import and export basic employee data. Optima Time Clock also allows you to export data from within the program.

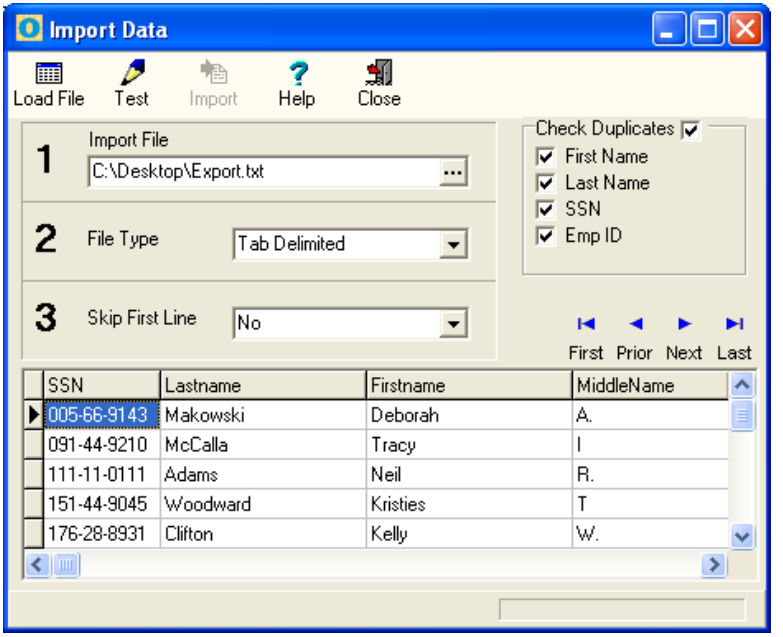
Chapter Contents:

Overview

The **import** function allows you to add new data from a text file into the Optima program. Conversely, the **export** function allows you to export data from the Optima program.

The software that you export your data from must be able to export the required information to a Tab delimited or fixed length text file. See Appendix D for the required import fields. Please note that we cannot provide support for other software program(s). Please contact the software vendor or manufacturer for more information on how to export data from your other software.

Import Screen



Features

Feature	Description
Load File	Loads the selected file into the data window.
Test	This tab will not highlight until a file is loaded. This checks for blank records and ensures that the department and location names that are being imported are already in the database.
Import	This tab imports the file into the database.
Help	This brings up the Help file pertaining to Importing.
Close	This closes the Import screen and takes you back to the main screen.

Feature	Description
Import File	This allows you to enter the path or navigate to the file you will be importing.
File Type	This allows you to select the file type. a. **Tab Delimited** – We recommend exporting or importing as this type of file. b. **Fixed Length** – Optima may export or import fields with a fixed length. See Appendix D on the field lengths.
Skip First Line	This will take out the first row, in case you have headers.
Check Duplicates	This allows you to check for duplicates against the import file and the files already in the database.

Required Fields

The following are required fields for importing:

- Last Name
- First Name
- Location – name must be in the Optima database prior to importing
- Department - name must be in the database prior to importing
- Date of Hire
- Full/Part Time
- Active Status (Active, Inactive, or Terminated)

NOTE: Location and Department names must be created within the Optima program BEFORE importing!

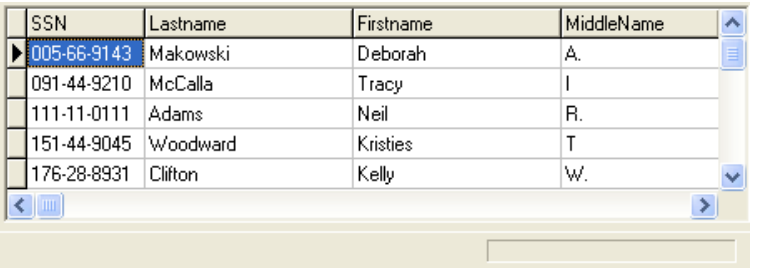
Importing

To import your information, follow these steps:

From within the program click **File > Import**.

1. Enter the path of the file or click on the ... to navigate to it.
2. Select **Tab Delimited** or **Fixed Length**. This should correspond with the way the import file was saved.
3. Select **Skip First Line** if you have title headings. Do not select Yes if you don't have title headings or you may lose the first line of data.
4. Click **Load File** to preview the file. At this point you should check that all column headings match the fields that will be imported.

Import (After Loading File)



SSN	Lastname	Firstname	MiddleName
005-66-9143	Makowski	Deborah	A.
091-44-9210	McCalla	Tracy	I
111-11-0111	Adams	Neil	R.
151-44-9045	Woodward	Kristies	T
176-28-8931	Clifton	Kelly	W.

Note the column titles above: SSN, Lastname, Firstname, and Middlename; check each column to make sure the appropriate data is in the correct column. For example, the SSN number should have an 11-digit number, plus two hyphens.

5. Select which fields to check for duplicates in the Check Duplicates box. Duplicates will be checked during the Test File phase.
6. Click **Test File**. This checks for blank required fields, and in the case of Location and Department, it checks to make sure that the name of the Location and Department has already been set up within the program.

CAUTION: If duplicates are detected and you click on Import, these fields will be imported into the program.

7. Once it passes the Test portion, you will be able to click on Import File.

Exporting

The **export** feature is used to transfer basic employee information into a text file that you can open in any word processor or spreadsheet application. Only the basic information (see Field Layout in Appendix D) will be exported.

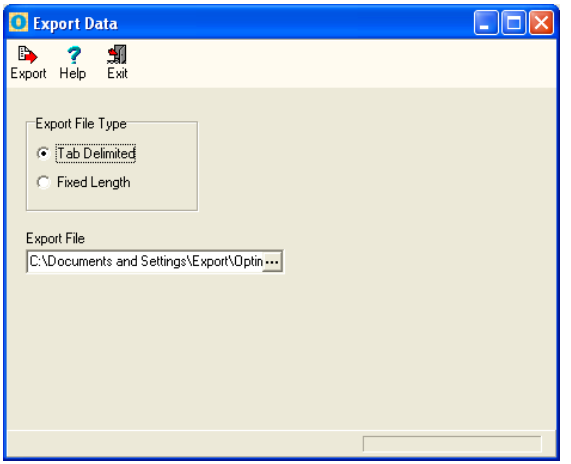
To export your information, follow these steps:

1. Click **File > Export**.
2. Select **Tab Limited** or **Fixed Length** for the Export File Type.
3. Enter a path and file name or keep the default name.
4. Click **Export**.

Your export file will be created as the file designated in the file block. You may rename the file, but we recommend keeping the file extension of .txt. After exporting, you may open the file from within any other spreadsheet or word processor program.

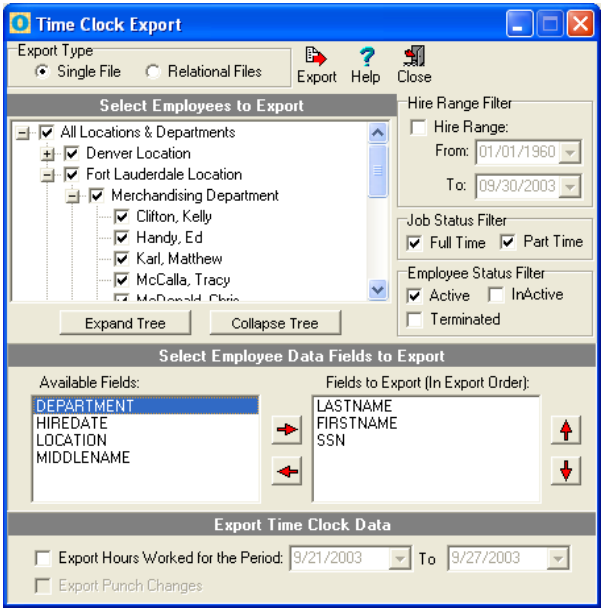
NOTE: Only the information in the Field Layout (Appendix D) will be available for export.

Export Screen



Export Time Clock Data

Export Time Clock Data Screen



The Time Clock Export feature allows you to export the following data:

- Last Name
- First Name
- Middle Name
- SSN
- Date of Birth
- Location
- Department
- Punch Hours
- Punch Changes

Feature	Description
Export Type	**Single File** – Exports Employee Data and Hours Worked to a single file. If Export Punch Changes is selected, it will export to a separate file. **Relational File** – Exports Employee Data and Hours Worked to two separate files. If Export Punch Changes is selected, it will export to another separate file.
Export	This allows you to export the data.
Select Employee to Export	This allows you to select specific employees, locations and/or departments to export.
Hire Range Filter	This allows you to filter on a specific hire date range.
Job Status Filter	This allows you to filter on full and part time.
Employee Status Filter	This allows you to filter on Active, Inactive or Terminated employees.
Select Employee Data Fields to Export	**Available Fields** – This is the list of fields to choose from. **Fields to Export (In Export Order)** – This is the chosen field.
Export Time Clock Data	**Export Hours Worked for Period** – This allows you to select a date range for time card data for the selected employee(s). **Export Punch Changes** – This allows you to export punch changes.

To export data, follow these steps:

1. From the **File** menu, select **Export Time Clock Data**.
2. Select the export type: Single File or Relational.
3. Expand the tree, if necessary, and select the employees to export.
4. Select the data fields to export by either double-clicking on the file, or selecting the file and clicking on the arrow pointing to the right.
5. If needed, select the Export Hours Worked option with a date range.
6. If Export Hours Worked is selected you can select to Export Punch Changes option.
7. Click **Export**.

Chapter 14: Getting Help

This chapter shows you how to get help throughout the program and contact information if you need to email or phone G.Neil Technical Support.

Chapter Contents:

Overview

There are several ways to get help throughout the program.

Sample Database

A sample company (called a tutorial database) is provided so that you may view the different screens with sample data already filled in. It is recommended that you use the program with the tutorial database in order to get a feel for the program without having to worry about altering live data. When you are in the tutorial database, no changes are made to your live database. To open the tutorial database select **Start**, **Programs**, **G.Neil**, **Sample Database**.

The Help Menu

From the **Help** menu, select **Contents**. A listing of help topics is displayed. Select the Book that interests you (using a double-click) and then double-click the topic you wish to display.

The F1 Key

Pressing the F1 key is another way to obtain help within the program. From most areas of the program**,** pressing **F1** will display the topic associated for that screen.

Searching for Help

You can search for Help two different ways using the Help File.

Method 1 – From the **Help** menu, select **Search for Help on**. The Help Topics **Index** will appear. Select the **Topic** that interests you.

Method 2 – From the **Help** menu, select **Contents**. Click the **Find** Tab. If you have not used this feature before, the Find Setup Wizard will walk you through setting up the search index. Once the search index has been created, type in the **Keywords** you would like to search for and the results will be displayed.

A list of typical errors or messages that were known at the time of publication are listed in **Appendix B - Troubleshooting**.

For more complete information, please refer to one of the following:

- Readme. txt file located in the **c:\program files\gneil optima\time8** program directory.
- Help File located in **c:\program files\gneil optima\time8** or accessible from the Start Menu.
- Internet Site www.gneiltechsupport.com

Before Contacting Technical Support

Please follow these guidelines before contacting Technical Support:

- Remember G.Neil does not support setting up networks or computer configurations.
- If you are having problems with your computer, try rebooting first to see if that corrects the issue.
- If you are getting an error message, please write down the whole message or take a screenshot of it. Pressing the **PrintScrn** button on your keyboard will copy the screen to the clipboard; you may then open MS Word or Wordpad and paste it to the document. From here you may print it out.
- If you are having problems with our program (getting error messages, program locking up, other strange things happening), please write down the steps to recreate the issue. This will speed things up when talking with a support representative.
- To get help in a timely manner, check the manual (Troubleshooting section), help files within the program, and our Web site at **www.gneiltechsupport.com** for known issues, and help on using the program.
- If you do have to call, be near the PC and have the following available:

  G.Neil Account Number

  Program Name

  Program Version Number (you may find this by going to **Help > About** from within the program)

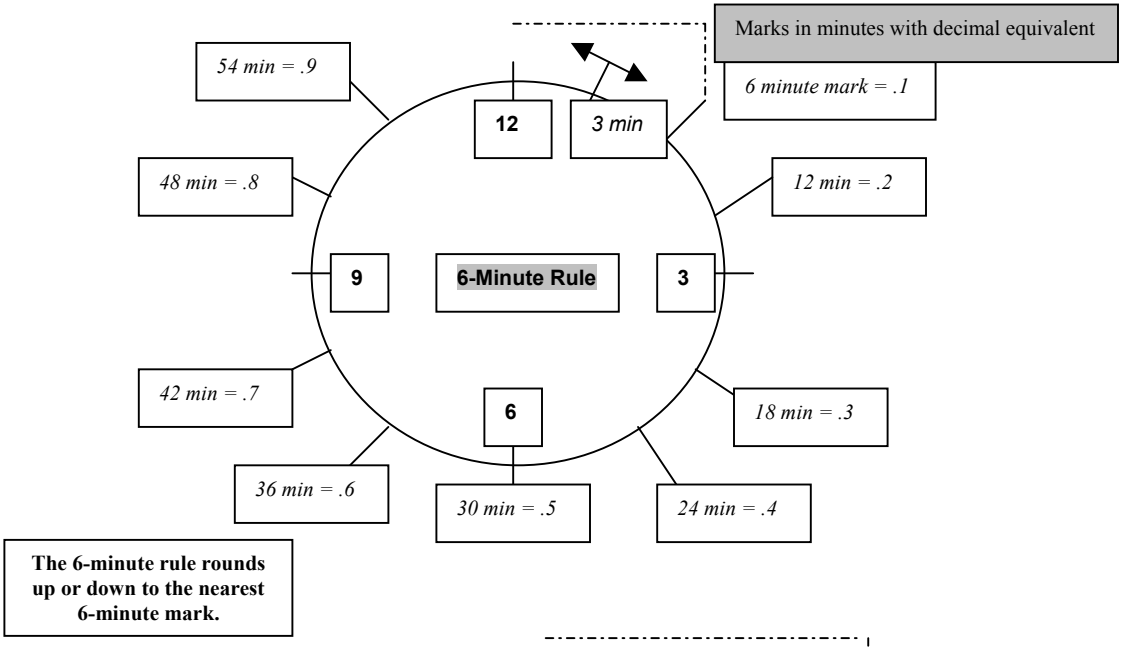
  Full error message and steps to recreate, if possible.

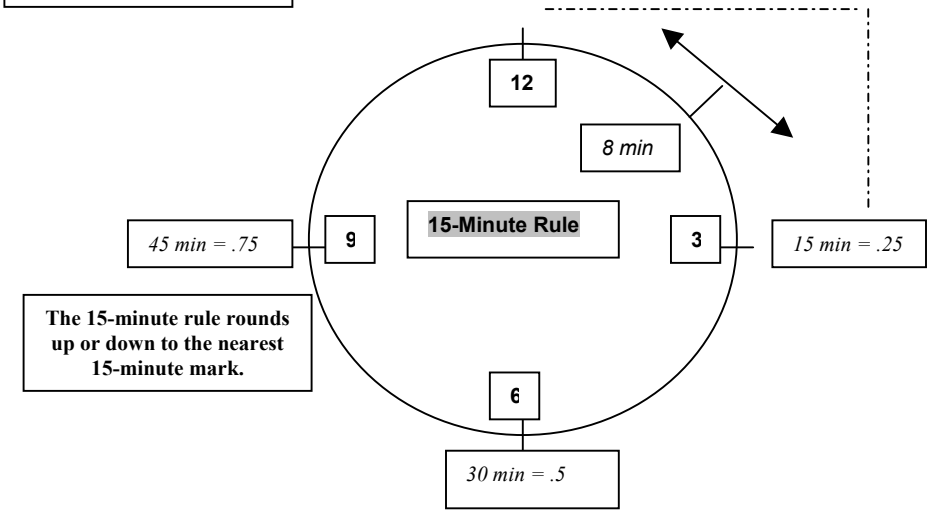
Contacting Technical Support

Technical Support for Optima Time Clock is available as follows:

Internet	http://www.gneiltechsupport.com
E Mail Requests	techsupport@gneil.com
Phone Requests	(888) 925-7740 (8:30 AM to 6:00 PM, EST, M-F)
Fax Requests	(954) 851-1214

Appendix A: Rounding Examples





Decimal Conversion Table

Minutes

1	2	3	4	5	6	7	8	9	10
.0166	.0333	.05	.0666	.0833	.1	.1166	.1333	.15	.1666

11	12	13	14	15	16	17	18	19	20
.1833	.2	.2166	.2333	.25	.2666	.2833	.3	.3166	.3333

21	22	23	24	25	26	27	28	29	30
.35	.3666	.3833	.4	.4166	.4333	.45	.4666	.4833	.5

31	32	33	34	35	36	37	38	39	40
.5166	.5333	.55	.5666	.5833	.6	.6166	.6333	.65	.6666

41	42	43	44	45	46	47	48	49	50
.6833	.7	.7166	.7333	.75	.7666	.7833	.8	.8166	.8333

51	52	53	54	55	56	57	58	59	60
.85	.8666	.8833	.9	.9166	.9333	.9166	.9666	.9833	1.0

Decimals

The above marks in gray designate minutes with the decimal equivalent below them. Semi-gray designate minutes that are equally divisible by 60.

The formula for getting the decimal number is *minutes* divided by 60.

Optima Time Controller automatically converts the time entry minutes to decimals. For example, if Joe had worked 8 hrs and 30 minutes, Optima Time Clock would show this as 8.5 hrs. This makes it easier for payroll purposes.

Appendix B: Troubleshooting

Here are the most common issues that you may experience when using Optima.

- Unable to connect to Interbase Server
- Getting **SQL Parse Error: EOF in String Detected** message when logging in
- Unable to install on a Win NT or 2000 system
- Exceeded the authorized user count
- Moving database from one location to another
- Installing Optima files to another drive other than c:\
- Installing Update from one location

Unable to connect to Interbase Server

Users affected

Optima Attendance Controller
Optima Confidential Employee Record
Optima Time Clock

Issue

When launching one of the programs above the following message may be encountered:

"This program was unable to connect to your Interbase Server. This is likely due to the fact that the default Interbase User Account has been change. Please provide a UserName and Password with Administrative Privileges to Interbase."

Description

Users may encounter this issue for one of the following reasons:

If running from a Server:

1. If you're using an NT server and trying to install the database files to a drive other than C:\, permissions to the database folder may be incorrect.

If running from a Standalone Computer:

2. Interbase Guardian may be shut down

3. If running from a Client Workstation:

4. Incorrect Server Name and/or Database Path
5. Client needs to have TCP/IP installed
6. Server may be down

Possible Resolution

1. If running Optima from a Server and encountering the above issue, try each of these solutions:

Check your permissions for the Database folder. Full Control access must be given to System for the database folder. You may add to the Permissions by going through Windows NT Explorer and going to Properties by right-clicking the database folder.

2. Check to make sure Interbase Guardian (or Interbase Manager) is running.

On a Win 95/98 system there will be an icon in the system tray (next to the clock). The icon graphic appears as a gray tower with a green flag. When you put your mouse over the icon it will read, "Interbase Guardian". This icon will not appear on a Win NT/2000 system. You may check to see if it is running on a Win 95/98/NT/2000 system by clicking on Start, Settings, Control Panel and clicking on the Interbase Manager. If it is not running click on Start (from within the Interbase Manager), then try to open the Optima application again.

3. If encountering the message when running from a Client Workstation, try this:

Check the Server Name and Database Path by going to the Server, opening the Optima application and clicking on Help, System Information and printing out this information from the TechSupport Tab. (If you don't have the TechSupport Tab then you have an earlier version of Optima and will need to do a screenshot of the System Information screen and Current Users screen and print them out.)

Once you have the Server information, go to the Client Workstation that you cannot connect to the Server with. From the Workstation, click on Start, Run, and enter: HRWARE.INI. Verify that the Server Name and Database path are the same.

NOTE: The printout of the Server Name and Database path you were asked to print or write down when installing the Server side must be exactly the same when entering this information on the Client Workstation(s)!

4. The Client needs to have TCP/IP installed.

This is done through the Network Neighborhood Properties. Please see your Network Administrator if you need more assistance in setting this up.

If everything is the same on the Client as it is on the Server and you're still unable to connect then try this:

If your Server has a static IP Address, try entering this for the Server name when installing to the Client Workstation.

5. If running from a Client Workstation and you went through the steps above and it didn't fix the issue check with your MIS or Network Administrator regarding the status of the Server.

Getting SQL Parse Error: EOF in String Detected

Issue: Getting an error message when logging in. Receive the following error message when logging in: **SQL Parse Error: EOF in String Detected**

Description: This is caused when pressing the comma key (**‘**) and **Enter** key at the same

Possible Resolution(s):
Avoid pressing the comma and Enter key at the same time.

Unable to install on a Win NT or 2000 system

Issue: Doesn’t finish installation

Description: This usually happens if you do not have full administrator rights on the Win NT or 2000 computer.

Possible Resolution(s):
Make sure you have full administrator rights before installing.

Exceeded the authorized user count

Issue:
You have exceeded the authorized user count. Your product license allows up to [number of licensed users] simultaneous users. There are # connections at this time.

The # connections is a number greater than one that changes each time you close and reenter the program.

Description:
Users may experience this issue when closing the program by clicking Exit under the File menu. Users who exit the program by clicking the close window icon in the top right corner will not experience the problem, but we still recommend downloading and installing the latest update.

Possible Resolution:

Download and install the latest Optima program from our Updates area on our Web site at: www.gneiltechsupport.com.

Please follow the installation instructions. After downloading and installing the update follow the steps below to clear the connections.

1. Close Optima and any other G.Neil Programs that are open.
2. Open DB Monitor and log in, if it is not already running. The DB Monitor resides on the computer where the Optima database is installed.
3. Click the Connections button.
4. Click the Refresh button to verify all connections are "N" (not active).
5. If all connections are "N", then Click the Clear Inactive Connections button, this will reset the connections.
6. If you wish to close the DB Monitor (not recommended if you have automatic database backups scheduled), right-mouse click on the icon G.Neil Database Monitor located in the system tray area, select Shutdown Database Monitor, and click OK to close DB Monitor.
7. Otherwise, click the Hide button.

Moving Database from One Location to Another

Issue:

Need to move your Optima database from one computer (or drive) to another.

Description:

You may need to move the Optima database because of receiving a new computer, new operating system, or running out of disk space among other reasons.

Possible Resolution:

The easiest way to move the database is to make a backup of your current database, install Optima on the new computer, and restore the database. Follow the detailed instructions below:

1. From the current database backup your files from within the Optima program by going to File > Maintenance > Backup Database or using the DB Monitor (go to Start > Programs > GNeil > Maintenance > DB Monitor > Backup). Put this file in a location where you can get to it from the new computer. For example, onto a shared network drive or Zip Drive.
2. On the new computer, whether installing to a Standalone Computer or Client-Server environment, we recommend installing Optima using Custom as the Setup Type and Server as the Install Type. This will put a blank database at that location. Restore the database (from Step 1) using the DB Monitor. When restoring, you can only restore from the computer where the database resides. You will not have the option in the

DB Monitor to restore from a Client Workstation. Note: When going through as a Server Install, this will give you the Server Name and Database Path. Write this information down or print it out if you have client workstations that need to connect to the database.

3. To point the Client Workstation(s), if applicable, to the new location launch the Optima program from the Client and enter the Server Name and Database Path (from Step 2) when it asks for it.

Please contact G.Neil Tech Support if you're having problems installing or connecting to the database. **Note:** G.Neil Tech Support cannot assist you with Network issues, such as setting up network access rights or checking your TCP/IP connection, but they may be able to give suggestions to common issues.

Installing Optima Files to Another Drive Other than C:\

Issue:

Installing Optima files to another drive other than the C:\ drive

Description:

Sometimes installing to the C:\ drive is not feasible. It may not have much space left or it's not meant for database files.

Possible Resolution:

When installing Optima there are three different sets of files that get installed: Program Files, Database Files and Database Engine Files (Interbase). When choosing Custom Install, you may select the location for the Program and Database Files that get installed at the same time. Interbase will automatically install to the c:\ drive after you click on the first Finish button. If this is okay, then you only need to follow Step 1 below and click on Finish. Otherwise, if you also want to install Interbase to another drive, then follow all of the below steps:

1. Run the installation of the selected Optima program (such as Optima Attendance Controller, Confidential Employee Record or Time Clock. When going through the installation process, choose Custom for the Installation Type. For the next two screens (Program Files and Database Files Location), click Browse to choose where to install them.

2. Stop at the point where it says FINISH. Do not click on it. Leave the install window open at this screen. Open Windows Explorer and go to the Windows Temp directory.

3. From the Windows Temp directory locate (or do a search for) IBWin32setup.exe.

4. Double-click on this file to start the installation process. This will install the database engine files (Interbase) and give you the ability to install these files to another drive other than C:\.

Install Update from One Location

Issue:

When a new update is released, you must install at each client workstation(s) and at the database server. These instructions will show you how to set up the Optima folders to only install the new update once from one central location.

Description:

Setting up one shared directory for the program files will make updates quicker and easier.

Possible Resolution:

These instructions will explain how to set up the Optima program files in one shared location to make updating easier:

1. **Copy the Optima installation file(s) to a shared directory.** The Server and all workstations that will have (or already have) Optima installed should have access to this shared directory on the network. If you downloaded the Optima update from our Web site (www.gneiltechsupport.com), then you will only have one file. If you have an Optima CD then you will need to copy the appropriate Optima program keeping all of it's folders intact. For example, while navigating the Optima CD through Windows Explorer, under the **BIN** folder, you would copy the **Atcon70** folder to the shared directory.
2. From the Server (or computer where the database resides), navigate to the shared directory, and run the Server installation (even if the Optima program is already installed on the Server) by following these steps:
   a. At the **Setup Type**, select **Server**. Click **Next**.
   b. At the **Installation Type**, select **Custom**. Click **Next**.
   c. At **Select Components**, leave the defaults. Click **Next**.
   d. At the **Program Files Location**, click **Browse** and navigate to the Shared directory. Add **\Optima** to the end of the Path.
   e. At the **HRWare Database Files Location**, click **Next**.
   f. Write down or print the Server Name and path. These will be needed for the Client installs. Click **Close**, then **Next**. This will install the Server files.
   g. If the **Interbase** install starts up, click **Next** to install it, otherwise, go to Step **H**.
   h. Go to Client Workstation.

3. From the Client Workstation, navigate to the shared directory, and run the Optima installation (even if the Optima program is already installed on the Workstation) by following these steps:
    a. At the **Setup Type**, select **Client**. Click **Next**.
    b. At the **Installation Type**, select **Custom**. Click **Next**.
    c. At **Select Components**, leave the defaults. Click **Next**.
    d. At the **Program Files Location**, click **Browse**, and navigate to the **\Optima** shared directory created during the Server install. Click **Next**.
    e. At the Database Server Information screen, enter the Server name and database path exactly as shown from the Server install.
    f. Click **Next**. This will install the program files.
    g. Follow the above steps for any other Client Workstations that will have Optima installed.

When the above steps are completed once, then when you need to install an update, only steps 1 & 2 (a-g) need to be completed. All users must exit the Optima program(s) before updating. All of the shortcuts on the Client Workstations will be pointed to the shared directory that will be updated when the Server install is completed.

Appendix C: Custom Report Tutorials

Tutorial #1 Modifying a Custom Report Template

A step-by-step guide to modify a custom report template. See Tutorial #2 for creating a report from scratch.

NOTE: You may use Optima Time Clock, Attendance Controller or Confidential Employee Record for this tutorial.

GOAL OF THIS TUTORIAL: This tutorial will show you how to create a custom report by using a provided template to remove a standard report field and add a new field.

Specifically, we will be removing Date of Birth and adding Social Security Number to the Employee Summary report.

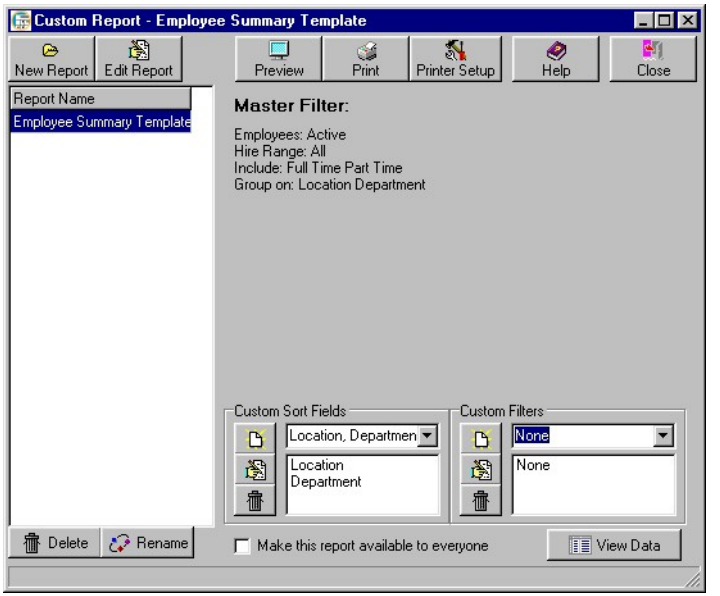
1. **TASK:** Launch the Optima program.

2. **TASK:** From the main menu, select **Reports** > **Employee** > **Summary**.

3. **TASK:** Click on the **Custom** Icon.

TASK: From the Custom Report main window, click on the **Edit Report** button.

Custom Report Interface

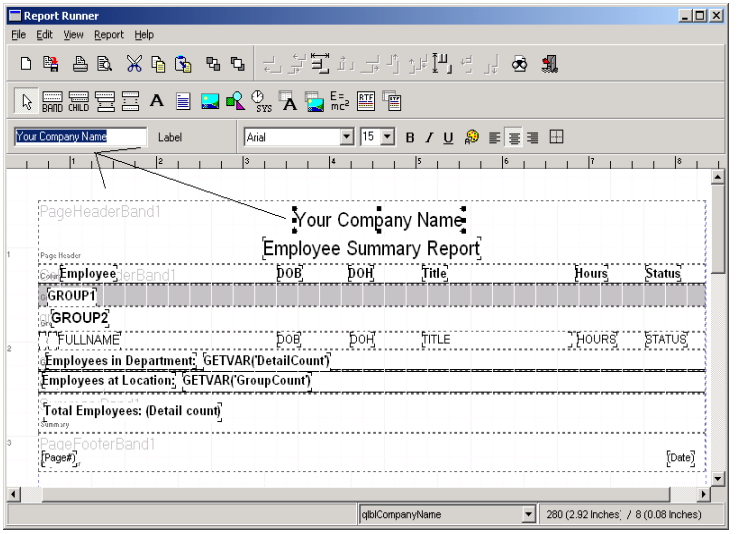


4. You are now presented with the report editing screen shown below. You will notice that the field label says "Your Company Name." Your first step in customizing a template should be to replace this label with your company name.

TASK: Click on the field "Your Company Name."

TASK: In the label field, type "Tutorial Company" or enter your company's name.

Custom Report Design Screen

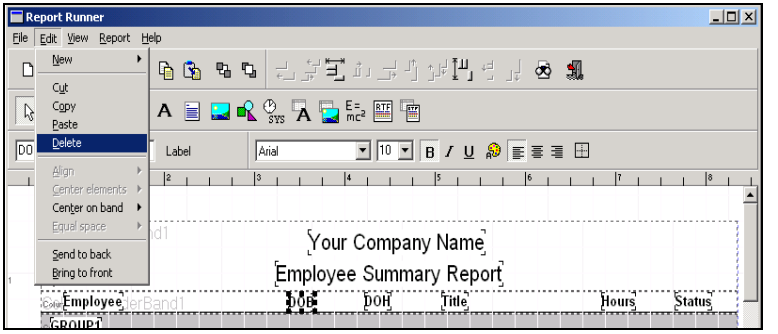


5. The next step is to remove the Date of Birth from the report.

TASK: Click on the top DOB label.

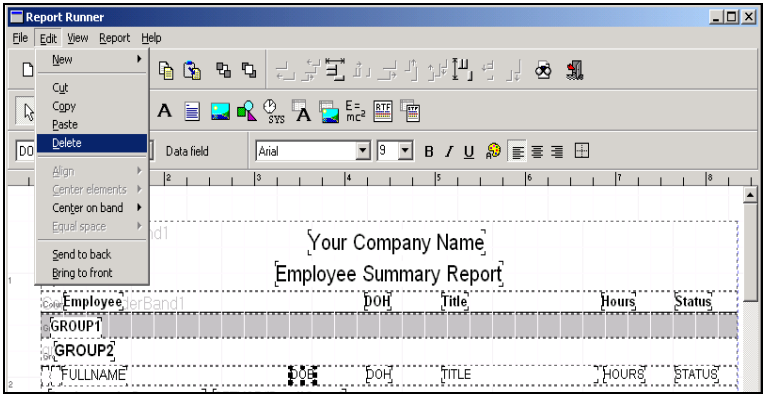
TASK: Select **Edit** from the main menu; select **Delete** as shown below.

Selecting Delete from the Edit Menu



TASK: Click on the DOB data field.

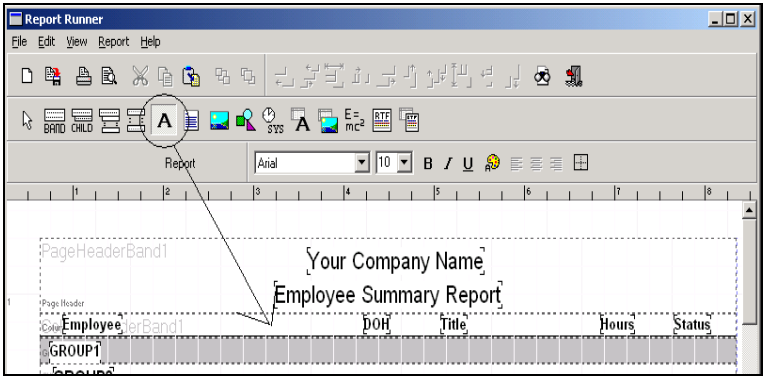
TASK: Select **Edit** from the main menu; select **Delete** as shown below.



6. You have now deleted the date of birth heading and data field from the report. The next step will be to add the social security label and field to the report.

TASK: Click on the label button circled below, and click in the "Column Header" band as in the arrow below.

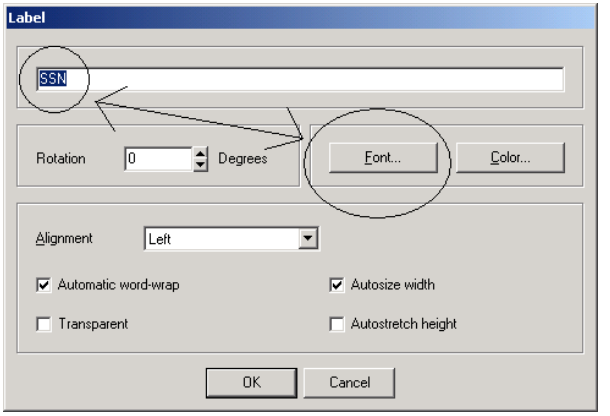
Selecting the Label button



7. You are presented with the Label Dialog Box shown below.

TASK: Enter "SSN" in the label field circled below.
TASK: Click the **FONT** button circled below.
TASK: Select **BOLD** for the font style.
TASK: Click **OK** to close the font window.
TASK: Click **OK** to close the label dialog box.

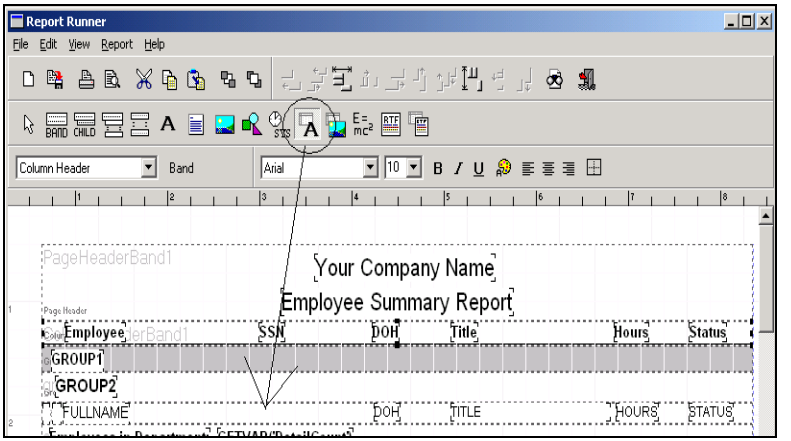
Label Dialog Box



8. The next step is to add the DOB data field.

TASK: Click on the datafield button circled below and click in the "Detail" band as shown below.

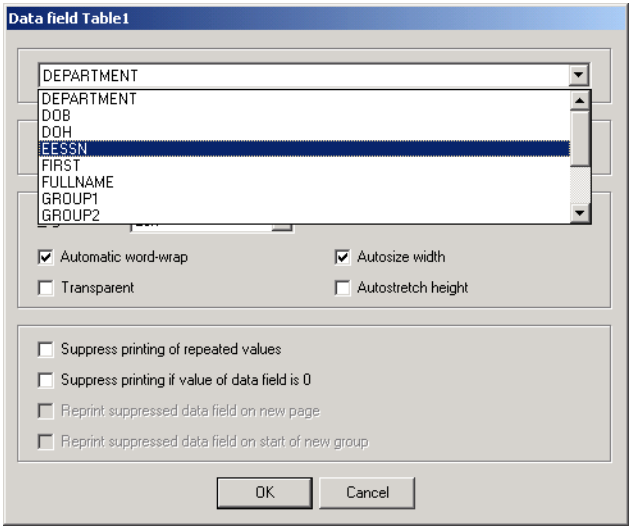
Selecting the Datafield button



9. You are now presented with the datafield dialog box shown below.

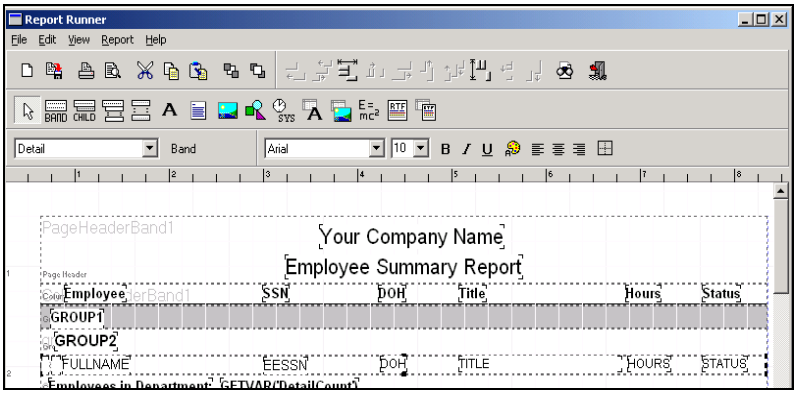
TASK: Select "**EESSN**" from the list of available fields as shown below.
TASK: Click the **OK** button.

Datafield Dialog Box



Your completed layout should now look similar to the screen below:

Completed Custom Layout



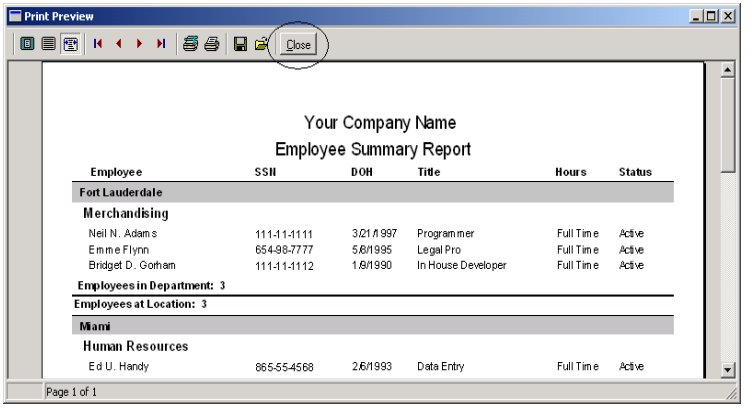
10. You can preview your results.

TASK: Select **File > Preview** from the main menu.

Your preview should look similar to the preview shown below.

TASK: Click the **Close** button to close the print preview window.

Print Preview Screen



11. The next step is to save your changes.

TASK: Select **File > Save as** from the main menu.

TASK: Enter "Custom Tutorial Report" as shown below and click **Save**.

12. You have now completed this tutorial. To return to the main program, follow these steps:

TASK: Select **File > Exit** from the main menu.

TASK: Click **Close** on the Custom Report Interface.

Tutorial #2 Creating a Custom Report from Scratch

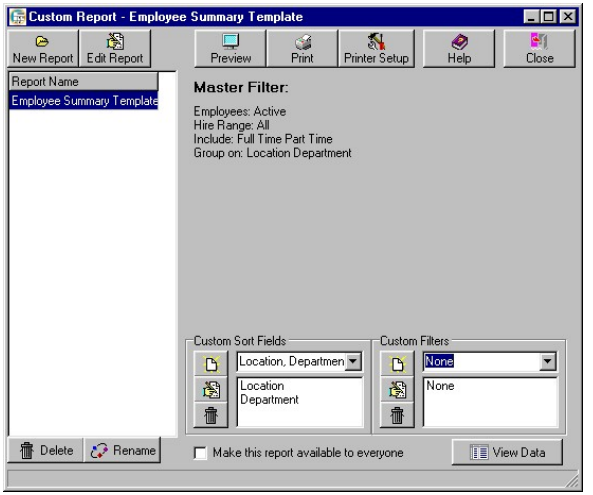
A step-by-step guide to creating a custom report from scratch.

NOTE: You may use Optima Time Clock, Attendance Controller or Confidential Employee Record for this tutorial.

GOAL OF THIS TUTORIAL: This tutorial will show you how to create a custom report from scratch using the Custom Reports, custom-reporting tool provided in the Optima programs.

1. **TASK:** Launch the Optima program**.**
2. **TASK:** From the main menu, Select **Reports** > **Employee Detail**.
3. **TASK:** Click on the **Custom** Icon.
4. **TASK:** From the Custom Report main window select **New Report**.

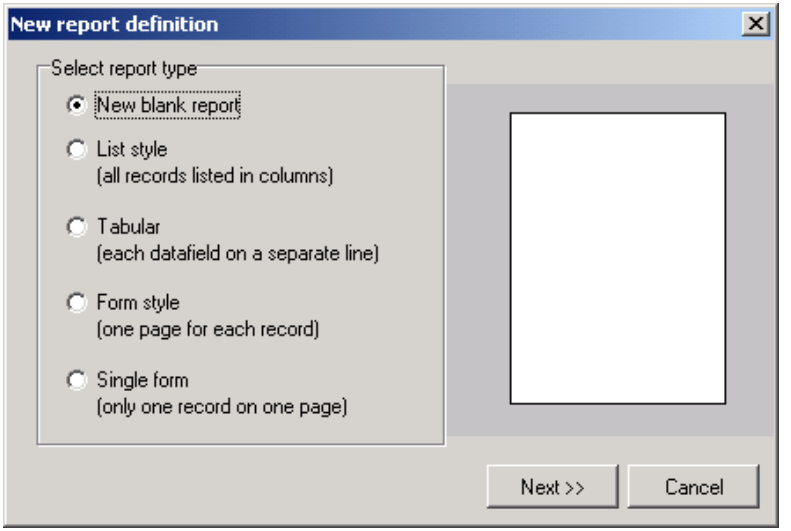
Selecting New Report from Custom Reports Interface



5. The screen shown below is the Custom Reports Design Window. This window is used for report creating and updating. When you select New from the main window, the designer first presents you with a report wizard. The report wizard assists you in creating a basic report. For the purposes of this tutorial, we will not be using the wizard. Instructions for using the wizard are provided in your Custom Reports documentation.

TASK: Select **New blank report** and Click **Next**.

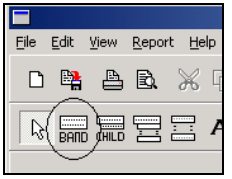
Selecting New Blank Report



6. We are now ready to begin designing our report. Data reports are designed with report bands. A report band is an area of data or text, which will repeat based on criteria we set at design time. Let's start with the first band common in most reports: The Title Band.

TASK: Click on the **Band** button circled in the screen shot below.

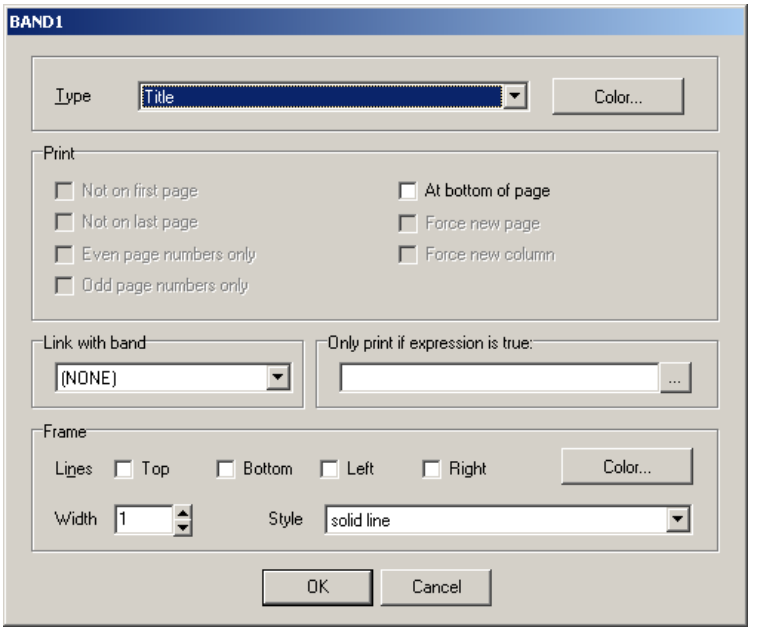
TASK: Click anywhere on the design page to drop the band on the page. (The design page is the white area filling the center of the window with grid lines.)



7. We are now presented with the "Band Editor" window. Note the Type of band is set to Title. This window has many advanced options which are covered in the Custom Reports documentation.

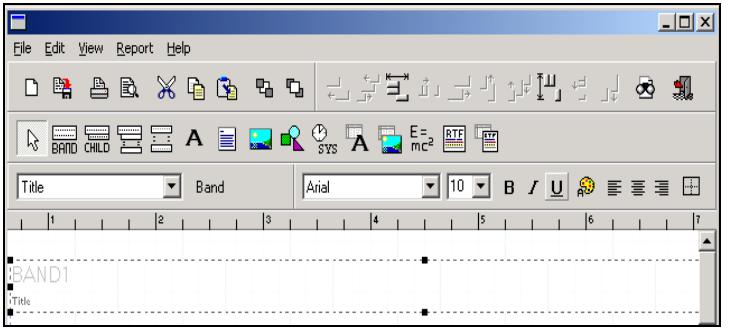
TASK: Click **OK** to place the Title band on the design page.

Band1 Dialog Box



8. The design page should now contain BAND1 as shown below. You will notice that BAND1 also shows that it is a Title band. Any text and/or data which is placed in the title band will be the first thing printed on your report. It will print only on the first page of the report – hence the name "Title."

Band 1

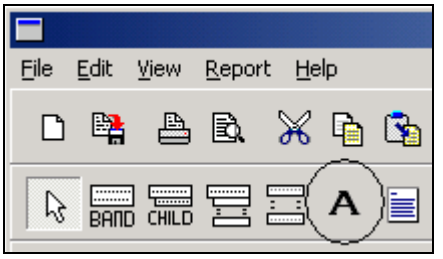


9. We will be designing an employee mailing list report; therefore, we want the title of our report to say "Employee Mailing List."

TASK: Click on the **Text** button circled in the screen shot below.

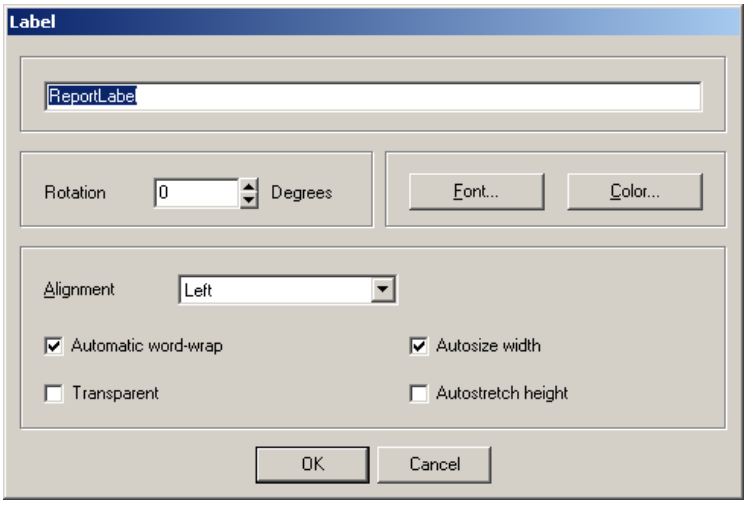
TASK: Click in the middle of the Title Band (BAND1).

Selecting the Label button



10. You are now presented with the Label window.

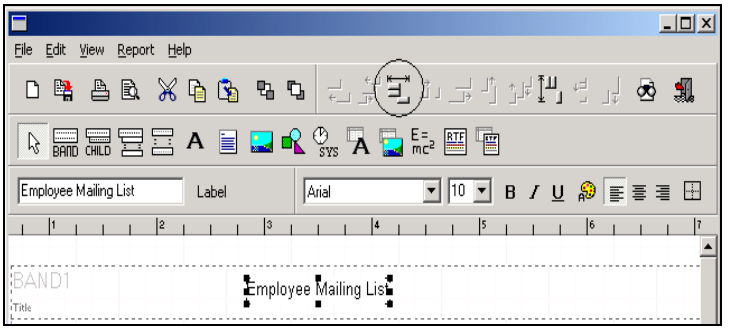
TASK: On the line where it says "ReportLabel," type in "Employee Mailing List."
TASK: Click **OK.**



11. Your screen should now look similar to the one shown below. The next step is to center the label in the band.

TASK: Click on the "center horizontally" button circled below to center the label in the band.

Centering Horizontally



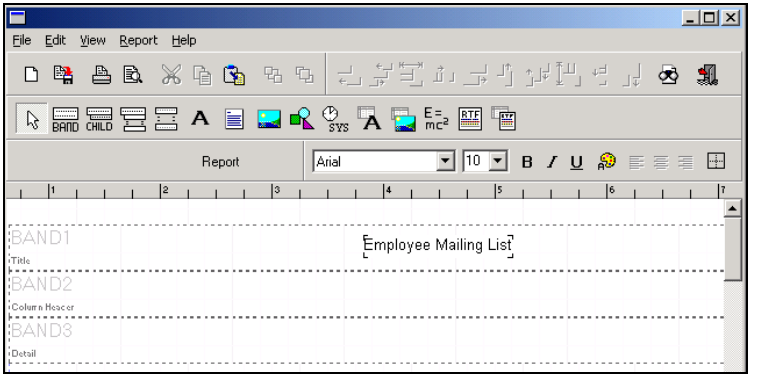
12. Now we need to add another band.

TASK: Click on the **Band** 

button and Click in the design window.
TASK: Choose "Column Header" for Type and Click **OK.**
TASK: Click the **Band** button again and Click in the design window.
TASK: Choose "Detail" for Type and Click **OK.**

Your design window should now contain a total of three bands (Title, Column Header, Detail) as shown in the screen below:

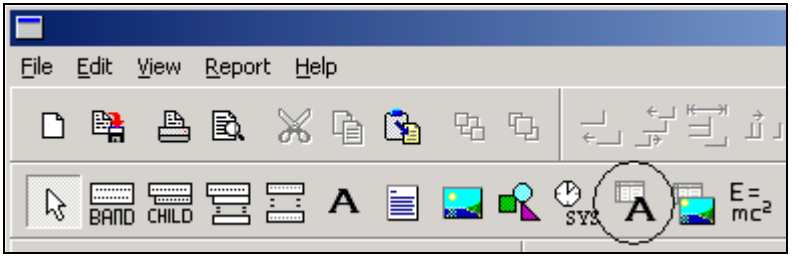
Band1, Band2, and Band3



13. The next step is to add the data fields to the Detail band.

TASK: Click on the data field button circled in the screen shot below.

Selecting the Data Field button

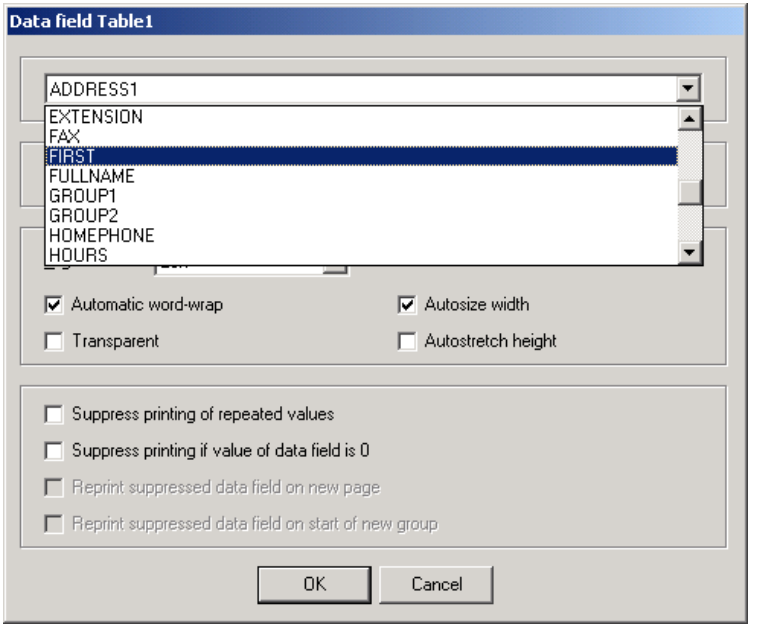


TASK: Click inside of the Detail band to bring up the "Data Field" window shown below.

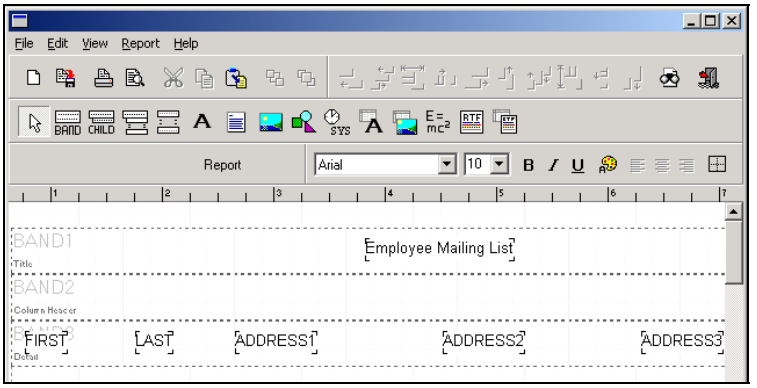
TASK: Select the field "FIRST" from the pulldown menu as shown below.

TASK: Click the **OK** button.

Data Field Dialog Box



Continue adding data fields so that your detail band is laid out as shown below.

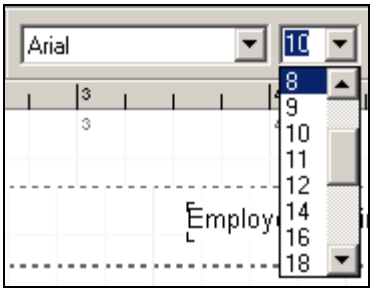


14. Now we need to change the size of font for the fields on the report.

TASK: To select all of the fields on our report, hold down your Shift key on the keyboard and and keep it down while Clicking on each field (FIRST, LAST, ADDRESS1, ADDRESS2, ADDRESS3).

TASK: Click on the font size dialog box shown below and set the font size to 8.

Selecting the font size

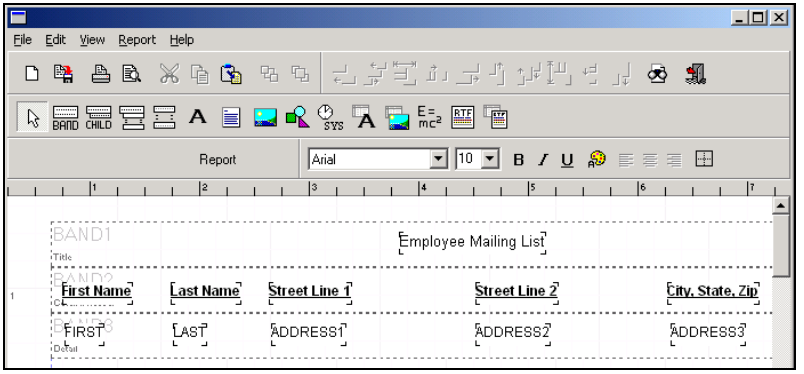


15. Now we are ready to fill in our Column Header band. This band will be printed on the top of our Detail band and is generally used for printing the names on columns on the report. We need to add text labels over the top of each datafield in the detail band.

TASK: Use the **Text**  button to add the text "First Name" above the [FIRST] data field in the Column Header band.

TASK: Continue adding text labels to the Column Header band above each data field so that your screen matches what is shown in the picture below.

Screen should like this



TASK: Select all the text labels in the Column Header band by holding down the SHIFT key and Clicking on each of them.

TASK: Set their font size to 8 and turn on the Bold and Underline properties by Clicking on the "B" and "U" buttons.

16. Add the Date and Time to your report.

TASK: Click on the **System Field** button. 

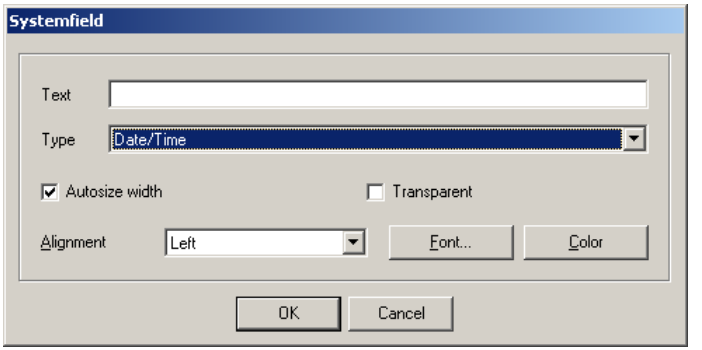
TASK: Click in the top left hand corner area of the Title Band.

17. After dropping the System Field in the Title Band, you are presented with the System Field Window shown below.

TASK: Select **Date/Time** as the Type as shown in the screen below.

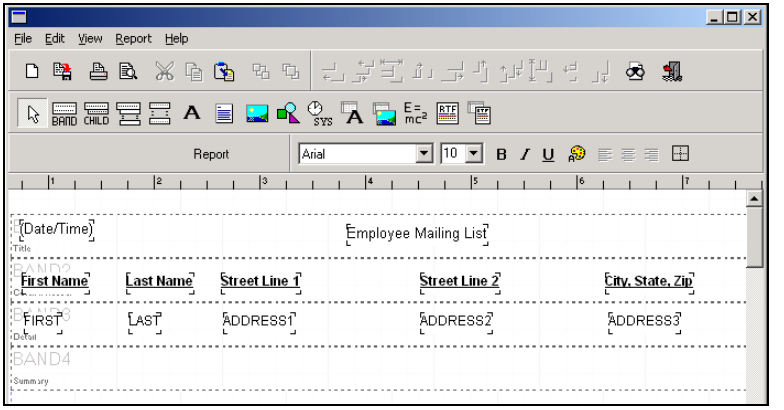
TASK: Click **OK**. The **(Date/Time)** text should be in the Title Band as shown in picture above.

Systemfield Dialog Box



18. Add one final band to your Report.

TASK: Click on the BAND button  and then click in the design window.
TASK: Select "Summary" as the type.
TASK: Click **OK**. Your screen should look like the one shown below:



19. Add a text label to the Summary band.

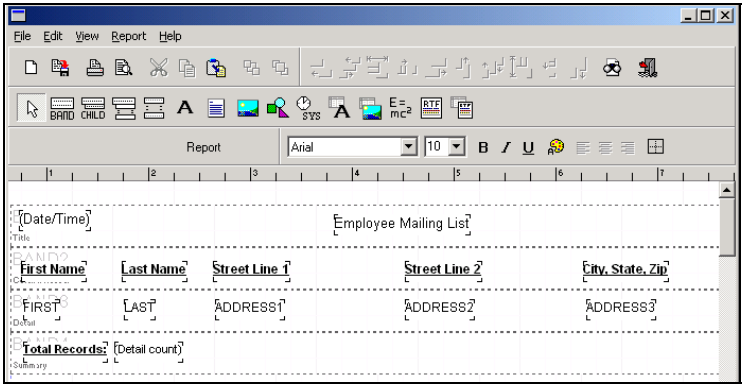
TASK: Click on the Text field button  .
TASK: Click inside the Summary band.
TASK: Type "Total Records": in the Label field and Click **OK**.
TASK: Set the label font size 8, Bold and Underlined.

TASK: Click on the System field button  .

TASK: Click inside the Summary band.

TASK: Set the Type as "Detail Count" and Click **OK**.

Completed Screen



20. **Optional** – Advanced Reporting Features – Script Language

The following section shows you how to add a small piece of Script Code to your report. This section is optional; if you wish to skip this section, go to Item 30.

Custom Reports provides an advanced way for you to add flexibility and creativity to your reports using script language. A detailed explanation of this feature and its use are provided in the Custom Reports documentation.

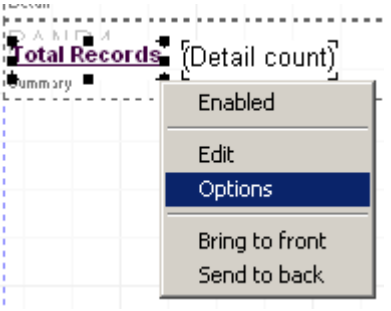
In order to access an item on your report, whether it's a field label or a text label, it must have a name. In this example, we will be adding code to access the labels in the summary band; therefore, we must give them a name.

TASK: Select the text label "Total Records" by clicking on it with your LEFT mouse button. It should appear selected by having six small boxes around its perimeter as shown below.

TASK: Now that it's selected, click on it with the RIGHT mouse button. A small drop menu will appear as shown below.

TASK: Click on **Options.**

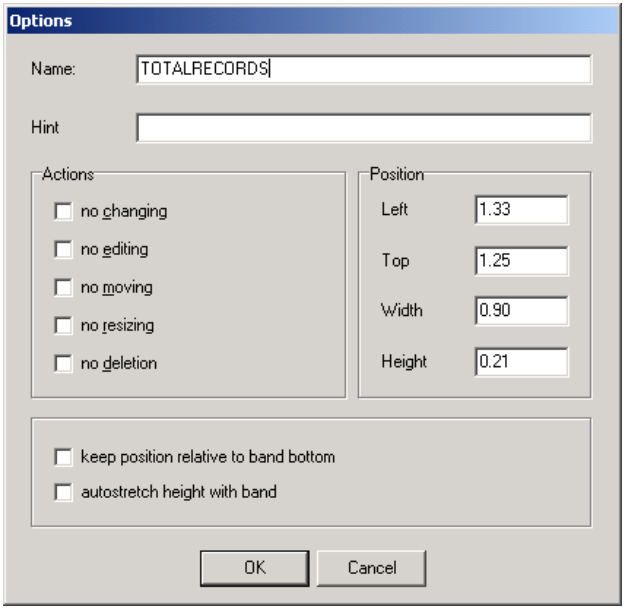
Right-clicking on Total Records and selecting Options



21. This will bring up the options window for this text label as shown below.

TASK: Enter **TOTALRECORDS** in the Name field and click ***OK.***

Options Dialog Box



22. We have now given the "Total Records": text label the name "TotalRecords." A name is required in order to access this label in the script language. We must now give a name to the Detail Count label.

TASK: Click on the [Detail count] field. It should appear selected.

TASK: Right-click on the [Detail count] field.

TASK: Click on **Options**.

TASK: Enter **DETAILCOUNT** in the Name field and Click **OK**.

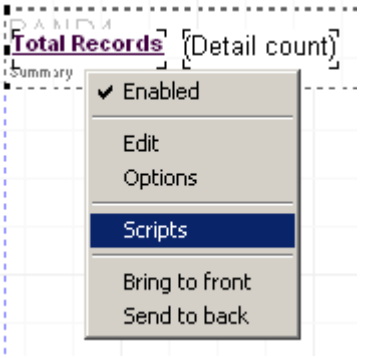
23. Now that these 2 labels have been given names we can access them in code. Script code is normally attached to the band which contains the labels you wish to modify. In this case, since these labels are in the summary band, we will enter the code into the summary band's script window. To do this, select BAND4 (the summary band); we need to make it the active band.

TASK: Click on the Summary band (BAND4). The summary band should now be highlighted.

TASK: RIGHT-click inside of the summary band. Be sure your mouse pointer is over one of the fields in the Summary band – you must click in an open area of the band. You should see the drop-down menu shown below.

TASK: Click on **Scripts.**

Right-clicking on Total Records and selecting Scripts



This will bring up the Scripts window as shown below. This is the window where you enter the script code. This window contains 2 tabs – Before Print and After Print. Any code entered in the Before Print window will execute before the band prints. Any code entered in the After Print window will execute after the band prints. If you want to add code to modify the look or layout of text in the band, it must be executing before it prints; therefore, we will enter our code in the Before Print window.

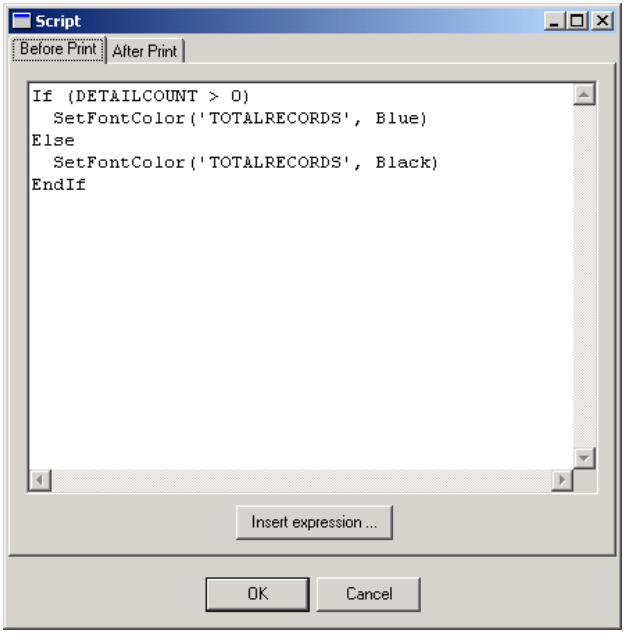
TASK: Enter the following code in the Before Print window:

```
If (DETAILCOUNT>0)
  SetFontColor('TOTALRECORDS', Blue)
Else
  SetFontColor('TOTALRECORDS', Black)
Endif
```

The above code tells Custom Reports to do the following: If the DetailCount is greater than 0, set the color of the label TotalRecords to Blue; otherwise, set the color of the label TotalRecords to Black.

TASK: Click ***OK*** to save the report code.

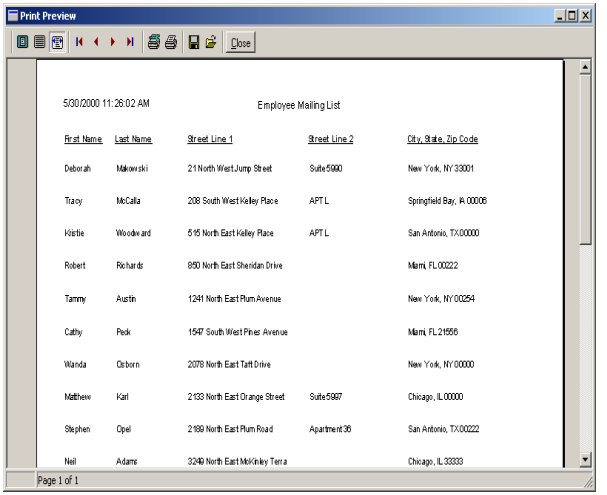
Script Dialog Box



24. The basic layout of our report is now complete. The next step is to save our report.
TASK: Select ***File > Save*** from the main menu.
TASK: Enter "Employee Mailing List" as the name of this report and Click ***Save.***

25. We can now preview the results of our report.
TASK: From the main menu select **File > Preview.**

Your view of the report should look similar to the screen below. If you did the Optional - Advanced section the **Total Records:** line at the bottom of your report should be colored blue.



TASK: To exit the Print Preview, Click **Close.**

TASK: To exit the report designer, from the main menu, select **File > Exit.** If you're prompted to save the report, select **Yes.**

TASK: To exit the Custom Reports main window, click **Exit.**

This concludes the Custom Reports tutorial. Custom Reports have many more powerful features that we encourage you to explore.

Appendix D: Import / Export File Format

You may import and export only the fields on the Field Layout page. There are two different formats that you may use: Tab Delimited and Fixed Length.

For a Tab Delimited format you may use any program that allows you to save as Tab Delimited. Excel and Access are two that will allow this. This is the easiest format.

When entering your information into a spreadsheet such as Excel, you will need to follow the order of the field names according to the Field Layout page.

For example, the columns should have SSN first, then Last Name, First Name, etc. Also, you will need to leave a blank column for any fields that you will leave blank. For example, following the format on the Field Layout page, we create a Tab Delimited file with the fields: SSN, **Last Name**, **First Name**, [blank column for Middle Initial field], **Location**, **Department**, **Date of Hire**, **Full/Part Time**, [blank column for Title field], [blank column for Employee Code field] and **Active Status**. All of the fields in bold are required. We would still need to have a blank column for MI, Title and Employee Code in the order of the fields.

For a Fixed Length format, you may use the DOS Editor or any other editor that shows you the field length. The lengths of each field must correspond to the Length column under the Field Layout page. We recommend using the Tab Delimited format.

The following is the field layout for importing text files into Optima. Fields shown in **bold** type are required and all import text files must include them.

Field Layout

Field Name	Length (if fixed length format)	Format
Social Security Number	11	123-45-6789
Last Name	20	up to 21 characters
First Name	20	up to 21 characters
Middle Initial	20	up to 20 characters
Location	50	up to 25 characters or numbers
Department	50	up to 25 characters or numbers
Date Of Hire	10	MM/DD/YYYY (slashes required)
Full/Part-Time	10	Full-Time or Part-Time (only)
Title	30	up to 30 characters or numbers
Employee Code	14	up to 14 characters or numbers
Active Status A,I,T	10	Active or Inactive or Terminated (only)

If you have Confidential Employee Record installed, your text file can also include the following fields:

Date of Birth	10	MM/DD/YYYY (slashes required)
Address 1	30	up to 30 characters or numbers
Address 2	30	up to 30 characters or numbers
Home Phone	30	800-123-4567 (dashes required)
City	30	up to 20 characters or numbers
State (2 character) 2	2	characters, i.e., FL
Zip Code	15	33325-1234 (-1234 can be omitted)
Salutation	5	Mr. – Ms. – Mrs. – Dr. (only)
Employee Security Level	16	up to 16 characters or numbers
Security Clearance Date	10	MM/DD/YYYY (slashes required)
Race	25	Must match a valid race on the detail tab.
EEO Category	25	Must match a valid category on the detail tab.
Sex M/F	1	M or F only
Driver's License Number	15	up to 15 characters or numbers
I9 Renewal Date	10	MM/DD/YYYY (slashes required)
Veteran Status	25	Disabled - Vietnam Era - Other Veteran – Not Applicable (only)
Office Phone & Ext.	30	800-123-4567 Ext. 123
Fax	30	800-123-4567
E-mail address	30	up to 30 characters or numbers
Address Effective Date	10	MM/DD/YYYY (slashes required)

Appendix E: Converting your Version 6 Custom Reports to Optima

Note that the following instructions only apply to users of Version 6 of Optima Attendance Controller and Confidential Employee Record.

The custom reports we are referring to are the reports that were created by you or another user. This is different from the ready-made templates within the custom reports. You have two choices regarding your Version 6 customized reports.

1. You may re-create the custom report in Optima by using the Wizard within custom reports (see Appendix C.) This is the recommended method.

2. Or you may manually convert your Version 6 custom report to the Optima Version.

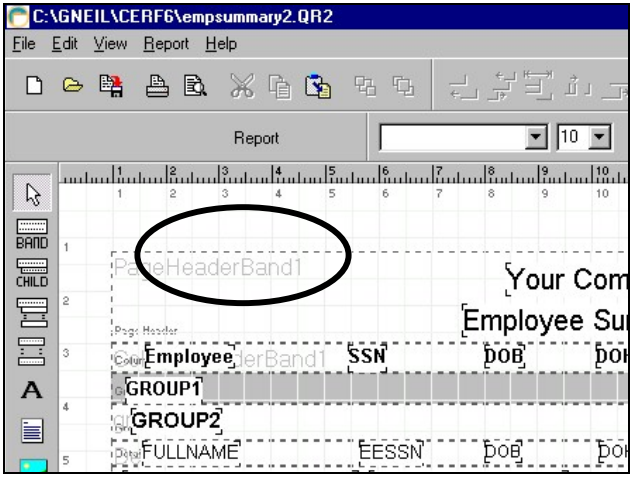
There are five (5) tasks that are needed to be completed in order to manually convert each of your custom reports. We only recommend going through these steps if you cannot re-create the custom report using the first choice above. These tasks should be done from the same computer with both programs installed.

Task One – Exporting your report and saving it as a .qr2

1. Open Version 6 and go to the Report Runner screen (as shown above) where your custom report is located.
2. Select your custom report and click on EDIT.
3. From the FILE menu click on PREVIEW. This just makes sure the report will come up.
4. Close the Print Preview window.
5. Select FILE, ADVANCED, EXPORT REPORT.
6. Enter a name for the report. The name can be the same as the report name. Once the name is saved it will save it with an extension of .qr2. Write down the path and report name for use in Task Two.
7. Keep Version 6 open at the Custom Report screen (shown above) and go to Task Two.

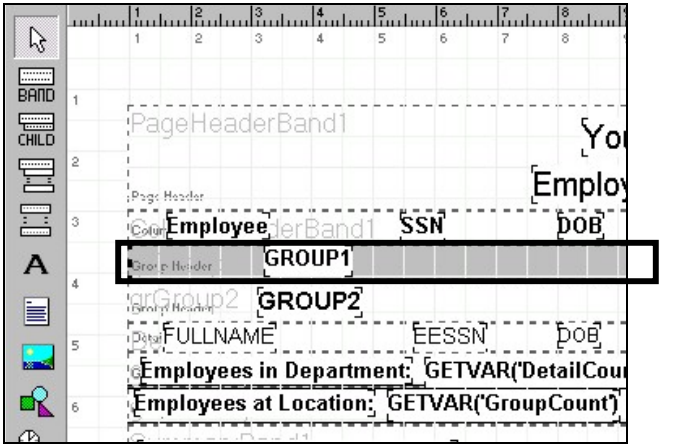
Task Two - Loading Ver 6 report into the Optima Custom Report Utility

1. Launch your Optima program.
2. From the Reports menu, select Employee Summary. The Employee Summary Report is only used to get to the Custom Reports feature.
3. Click Custom , then New Report.
4. Enter a name to designate this report. The name can be the same as the Version 6 customized report.
5. Select New Blank Report, then click Next.
6. Select the File menu, then click Open QR2.
7. Navigate to where the Version 6 file is located.
8. Click on the .qr2 file then click Open. This will load the Version 6 report into the Optima Custom Report Utility. Go to Task 3.



Task Three - Change Page Header Band from TABLE1 to MEMREPORT

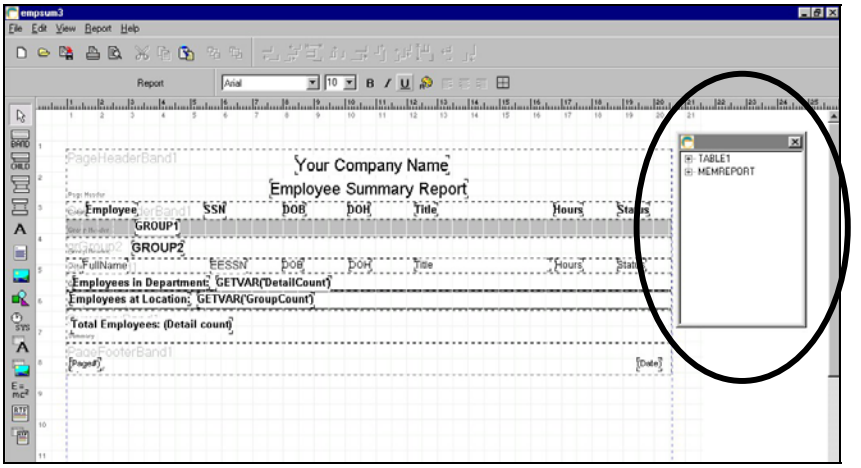
1. With your Version 6 report open to the Optima Custom Report Utility, click the Report menu and select Datasets.
2. Under the Main Report Table, click the drop down arrow and select memReport, then click OK.
3. Click once on the PageHeaderBand title.
4. With the PageHeaderBand selected, right-click on it and select SCRIPTS.
5. Replace everywhere it has **'Table1'** with **'memreport'** making sure to keep the single quote marks around it.
6. Click OK.
7. Go to Task Four.



Task Four – Change grGroup Header and grGroup2 from TABLE1 to MEMREPORT

1. Click once on the Group Header band (NOT the GROUP1 field) to select it. The Group Header is the dark colored band. You may click anywhere on the band to select it.
2. Right-click on Group Header and select EDIT.
3. Locate Group by field or expression.
4. Click on the 3 dots button to the right of Group1.
5. Under Insert at Cursor Position, click the Database Field button.
6. Under the Available Fields, select Group 1 and click OK.
7. Click OK at the Expression Wizard screen.
8. Click once on the grGroup2 band (NOT the GROUP2 field) to select it. You may click anywhere on the band to select it.
9. Right-click on grGroup2 and select EDIT.
10. Locate Group by field or expression.

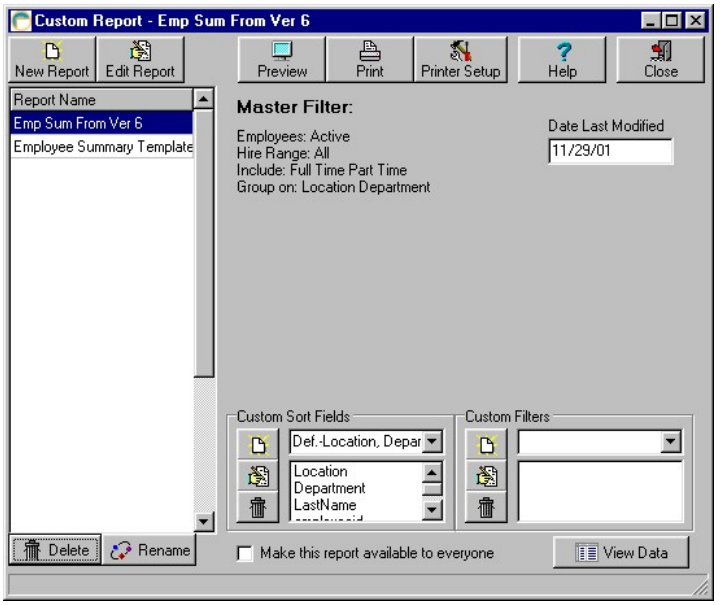
11. Click on the 3 dots button to the right of Group2.
12. Under Insert at Cursor Position, click the Database Field button.
13. Under the Available Fields, select Group 2 and click OK.
14. Click OK at the Expression Wizard screen.
15. Follow the above steps if you have more group bands.
16. Go to Task Five.



Task Five – Changing all field names from Table 1 to MemReport

1. In the Data Field box (circled above), you should see both TABLE1 and MEMREPORT. If not, save the custom report you're working on, close out of the Optima Custom Reports and make sure that Version 6 Custom Reports is open, then reopen the Optima Custom Reports.
2. Field Names are usually on the Detail Band and normally not in bold. Title headings are usually in bold. Field names are the fields that give you your actual data on a report. Normally, you'll see two fields with the same name when editing a report. One is usually the title, and the other is the data field. With all that said, the next step is to change all data fields (not titles) from Table1 to MemReport.
3. Follow the remaining steps for each data field (such as Full Name, EESSN, DOH, etc.) on the Detail Band.
4. Click once on the first data field, such as Full Name, then right-click and select EDIT.
5. Click on the drop down arrow in the first block and select memReport, then click OK.
6. Do steps 4 – 6 for all data fields.

Once those tasks are completed, you should be able to see your custom report under the Employee Summary Custom Reports interface. (See screenshot below.)



You have the option to allow others to see this report from their computer by clicking in the checkbox for "Make this report available to everyone."

See Chapter 12 Custom Reports and Appendix C for more information.

Appendix F: Standard Time Vs Military Time

The following chart is for reference.

Standard Time	Military Time
12 pm	1200 hrs
12:30 pm	1230 hrs
1 pm	1300 hrs
2 pm	1400 hrs
3 pm	1500 hrs
4 pm	1600 hrs
5 pm	1700 hrs
6 pm	1800 hrs
7 pm	1900 hrs
8 pm	2000 hrs
9 pm	2100 hrs
10 pm	2200 hrs
11 pm	2300 hrs
12 am	2400 hrs
1 am	0100 hrs
2 am	0200 hrs
3 am	0300 hrs
4 am	0400 hrs
5 am	0500 hrs
6 am	0600 hrs
7 am	0700 hrs
8 am	0800 hrs
9 am	0900 hrs
10 am	1000 hrs
11 am	1100 hrs

Appendix G: ET215 Terminal Quick Start

Overview

This is a QUICK START document for use with the Time Clock Remote Ethernet Terminal. It will help the first time user get a terminal installed and communicating rapidly. It is strongly recommended that this documentation is reviewed BEFORE installation of the terminal is attempted.

It is assumed that the user has a host computer with the TCP/IP network protocol installed and the computer is connected to the Ethernet network. It is also assumed that the installer is familiar with network fundamentals such as IP address and port number. The Optima Time Clock Remote program is required to remotely configure and test the terminal over the network.

Time Clock Remote Configuration

The terminal must be configured with a valid IP address BEFORE it can be installed on the network. Initially this process is accomplished using the keypad & display. Once it is configured properly and installed on the network, it can be reconfigured over the network using the Optima Time Clock Remote program.

1. Attach the power adapter to the terminal and plug the adapter into a power receptacle. (See picture below.)
2. The terminal should "beep" three (3) times and then display the "Offline" message.
3. Hold down the "S1" & "S2" keys and then press the "IN" key to enter the configuration mode. A menu will be display, press the "2" key to modify the configuration parameters.
4. The default IP address will be displayed. In most cases the default IP address (192.168.168.50) will have to be changed. Use the keypad to modify the IP address value and press the "Enter" key.
5. The default network mask will be displayed next. Change this if you have a network mask and press the "Enter" key.
6. The other setup parameters are presented one at a time on the terminal display. Press "Enter" until you get to MODE. Change the Mode parameter to 2. The default values for the others should be valid for most applications and can be accepted by simply pressing the "Enter" key.

7. When all of the setup parameters have been entered, the terminal will return to the configuration menu. Press the "Enter" key to exit the configuration mode. The "Offline" message will be displayed.
8. At this point the terminal can be powered down and is ready for installation.

Installation

Once the Time Clock Remote has been configured, it can be installed on the network.

1. Connect the terminal (RJ-45) to a 10/100BaseT Ethernet hub (or switch) with a standard Ethernet cable. (See picture below.)
2. When power is applied one of the network status LED indicators should light.
3. Start the Time Clock Remote program on the host Windows PC computer and login by going to File > User Login.
4. Click File > New Terminal to create a new terminal connection. The Terminal Name is what will display under Help > System Information on any Optima program. Select the Time Clock Remote (or the appropriate Terminal Type) and enter the IP address and the Port Number (default is 1070).
5. Select Connect at Startup and press Connect. The Time Clock Remote program will display Connected and the Terminal will respond with the date and time. This indicates the Terminal is communicating over the network and is ready to accept commands.
6. Data can be entered on the Time Clock Remote keypad by pressing the numeric keys and then pressing the "Enter" key. The entered message will appear on the telnet client screen.
7. If the Time Clock Remote is equipped with a card reader (mag-stripe) the decoded output can be displayed.

Optional digital I/O functions can also be tested using the RELAY, INPUTS, and COUNTER commands.