Jarrison Time®

User Manual

6.8

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Logging In

To login to Jarrison Time, double-click the icon on the desktop, or locate the shortcut icon from the Start menu.

Insert your user name and password and click on '**OK**' or press Enter. Next login you can press the <Backspace> key to fill your user name in automatically.

Note that if Alternate Languages have been enabled in the system the login screen will have an additional icon in the upper right, allowing selection of language.

Registration

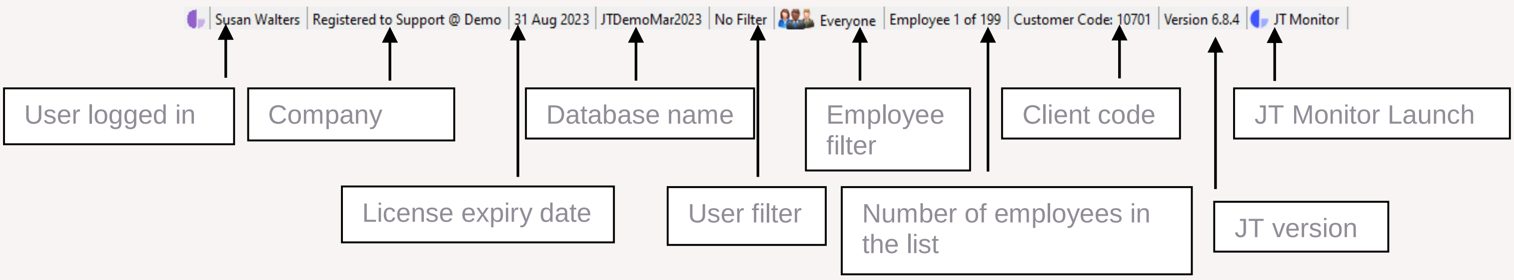
The installer usually assists with the registration process. This process is automated via Internet connection. After changing any **Registration** details the '**Resubmit**' button must be clicked to send a request to the server for the change. If the change is in accordance from an administrative perspective then it will be applied. If not in accordance the change will not be applied and a resubmission will be necessary.

After a licence request has been submitted its status can be viewed by clicking the '**Check Status**' button that will appear at the bottom of the window Status Bar

There are various status bar items which offer current information to you.

– Engine Status **(Purple - Engine not running)** **(Red - All Devices Offline)** **(Green - All Devices Online)** **(Orange - Some Devices Offline)**

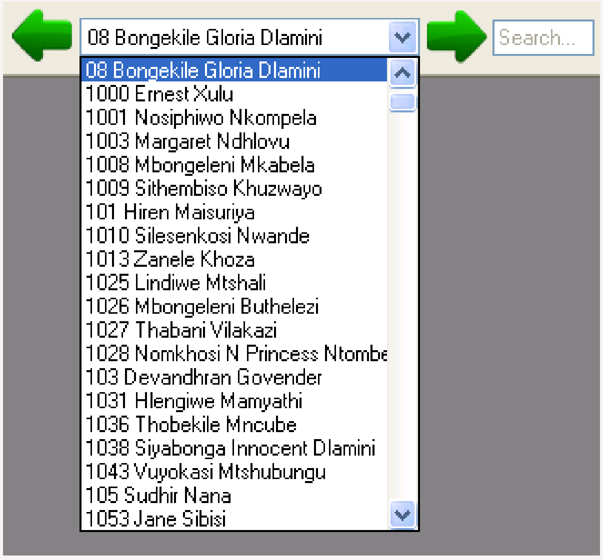
The same colouring code is used on the Engine icon on the toolbar, found on the far right of the bar, and the system tray icon.



The **JT Monitor** icon will appear in JT where the engine is being run, or if there is no '**Computer Name**' in System Configuration. Please see the JT Monitor document for further information on this tool.

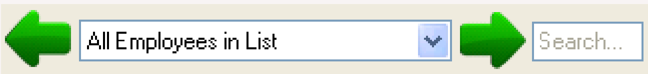
Employee List

On the toolbar there is a drop-down list of employees, as shown below:

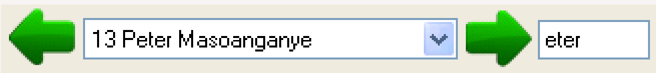


The employee that you select will become the **Active** employee, and all actions will be applied to that particular employee E.g. Reports and Manual Adjustments. To navigate to the next employee click the forward arrow (or push F9 on the keyboard), and similarly to go back to a previous employee click the back arrow (or push F8 on the keyboard).

To select all of the employees in the list (for a report or file export etc.) you can select the first item in the list (or push F7 on the keyboard). The list will look like this:



To **Search** for a particular employee (F3), you can type any part of their Name, Surname or Employee number in the search bar.

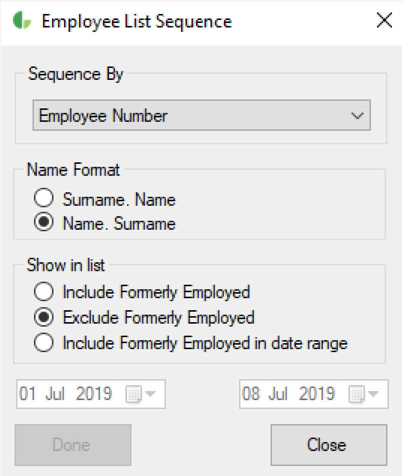


Only employees matching the search will be included in the list. The more letters typed in the search bar, the more refined the list becomes. Double-clicking in the search field will clear it.

The total number of employees, and the position in the list at any given moment, is shown in the status bar (see section on **Status bar** for more).

Employee Sequence

The employee list can be customized.

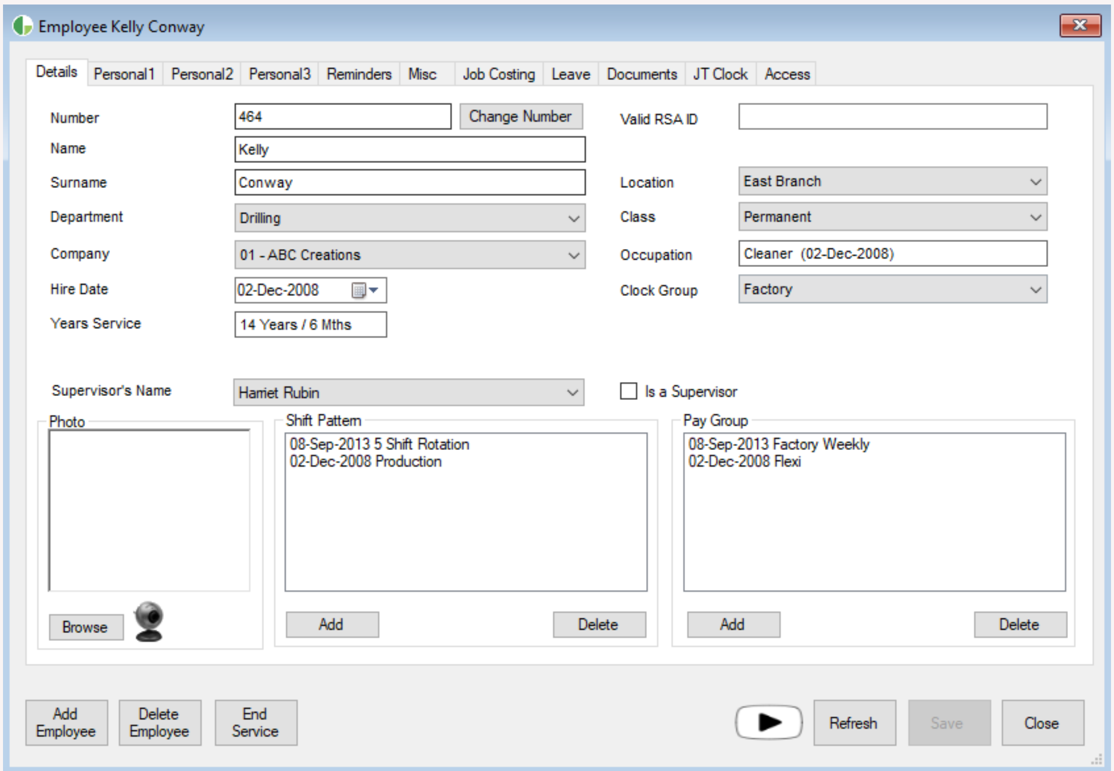


Click on ‘**Setup**’, ’**Employee List**’ then ‘**Employee Sequence**’ to open the window, or right-click on the employee list dropdown itself. In this window one can change how the employees are listed in the employee list, and supervisors in their dropdown list on the **Personal** tab of **Employee Details**. You can select between Name, Employee Number, Department, Code or Device ID as the list sequence. The **Name Format** option selects either name or surname as the first item to display. You can choose to include or exclude formerly-employed employees here, or specify to only include employees whose service ended within the date range. You can also include and exclude terminated employees from ‘**Setup**’, ‘**Émployee List**’.

Employees 

To modify or view employee information you will work in the **Employee Details** window. To open this window click on ‘**View**’ then ‘**Employees**’ from the menu bar, or the icon on the toolbar.

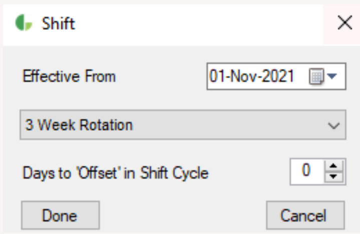
To add an employee click ‘**Add**’, then enter employee number, name and surname. All other fields are optional. When adding an employee, he or she will be assigned default selections. It is recommended to enter correct information into many fields, as grouping according to multiple fields will be made easier later. Employees can also be grouped according to their hire, termination and birth dates.



Employee numbers cannot be duplicated (although names may be) and they must be identical to those in the Third Party system(s) if these systems are being integrated. If the employee number needs to change, it must change in the external system and JT simultaneously.

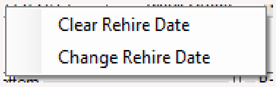
The '**Change Number**' button appearing next to **Number** is to enable users with permission to change the employee number if required; this should be done carefully in a live system as it may result in lost data otherwise.

The shift to which an employee is assigned will determine the person's **Daily** calculations, and the Pay Group will determine the **Pay** calculations.



The employee's hire date is used to automatically set shift pattern, pay group and other date-based start dates. In the image above, the employee was assigned to the 'Production' shift from his hire date on 2 December 2008. Then later changed to '5 Shift Rotation' shift on 08 Sep 2013. You can change an employee's original shift pattern or change an existing one, by double-clicking it. (The shift pattern itself would have to have started on or before the employees hire date). To record an employee changing from one shift to another, click on '**Add**', this will present a window where you can select the shift and the date that they started or will start the shift. If the Shift Pattern has '**Days to 'Offset' in Shift Cycle**' enabled, you will be able to select their start point in the cycle here. In a 3 week rotation with a 21 day cycle, the offset is usually 0, 7 or 14.

To delete an employee, ensure that the employee you want to delete is selected and then click '**Delete**'. A confirmation message will appear. It is recommended that employees have their service ended (are terminated) rather than deleted, as their records will still be available and retrievable for future use. Employees whose service has ended can be included or excluded from the employee list using the '**Employee Sequence**' option, explained later. An employee whose service has ended can be re-instated if he/she returns to the company.



When ending service for an employee a reason can be provided as well. These reasons are defined under '**Setup**', '**Reasons**', '**End Service Reasons**'. Reasons can be reported on or viewed on the **Misc** tab (shown later in this document)

Once service has been ended an employee can be marked for '**Do Not Rehire**' which will prevent the employee being reinstated, except by an administrator.

If an employee is re-instated a rehire date will appear– this date can be edited or cleared by right-clicking on it.

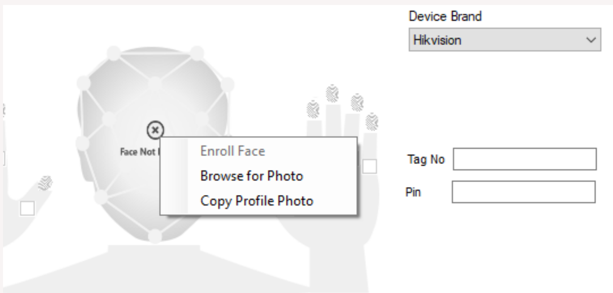
Years Service is a calculation of how long the employee has been hired.

You can assign an employee to a supervisor by selecting the **Supervisor's Name**. The employee may be marked as a supervisor by selecting the **Supervisor** check box. Then they will appear in the 'Supervisors Name' list.

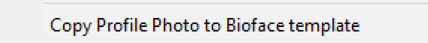
If the clockings are being retrieved from an access control system, it is typical to add employees in the access control system. When importing the clockings, Jarrison Time will be able to add the employees (using the name, surname and employee number) automatically or one by one.

If **Clocking Groups** have been configured and are being utilized, then employees' clockings will only be read from certain readers on the system, according to the clocking group selected. These groups should be configured by the installer. Assign each employee to his/her relevant clocking group in this window. If employees are added to JT from an access control system using clocking groups, employees will only be automatically added from readers set as T&A in the access control system. Employees who clock at different stations will have to be added to JT manually.

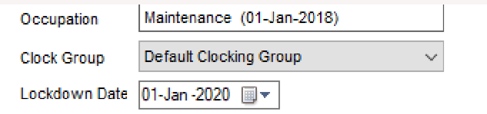
If you wish to keep photos of employees you have two options: if you already have photos you can click '**Browse**' and load the image from file, or if you have a web camera setup you can click the webcam icon and capture a photo that way (launch Jarrison as Administrator for this functionality, also note this may not be available for Windows 10 Home edition users). Photos can also be uploaded in bulk, from '**Import**', '**Employee Photos from File**'. To use this feature each photo file's name should match the employee number of the employee in Jarrison. Right-clicking on a photo will allow the photo to be rotated.



If facial Hikvision or ZKTeco devices (algorithm 3, 5, 8 or 12) are in use, there will be a right-click option on the **Enrollment** tab under **Access** to copy the profile photo and use as facial template (known as a Bioface template). There is also a **Multiple Action** option ‘**Copy Profile Photo to Biofacе template**’ to perform this for a group of people. Keep in mind that these photos should meet with the standards of facial enrollment photos (see later section on Import of Employee Photos).



If the system is set to ‘**Use Employee Timesheet Lockdown Date**’ (please refer to the configuration manual for more info on setting this), there will also be a **Lockdown Date** option on the **Profile** tab.



This allows for individual timesheet lock dates to be set per employee. Lock dates can be also be changed in bulk via ‘**Multiple Actions**’, ‘**Employee Lockdown Date**’.

Note that the **Job Costing** and **Leave** tabs will only appear if those modules have been licensed. The Job Costing and Leave tab options are discussed in the manuals for those modules.

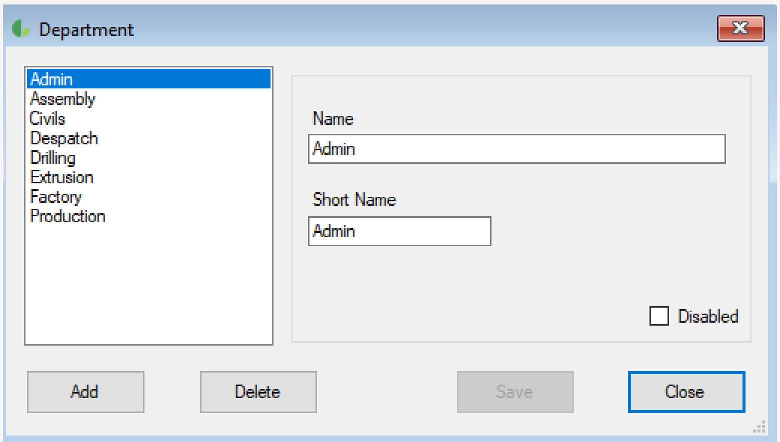
Adding Departments, Occupations, Companies, and Sites

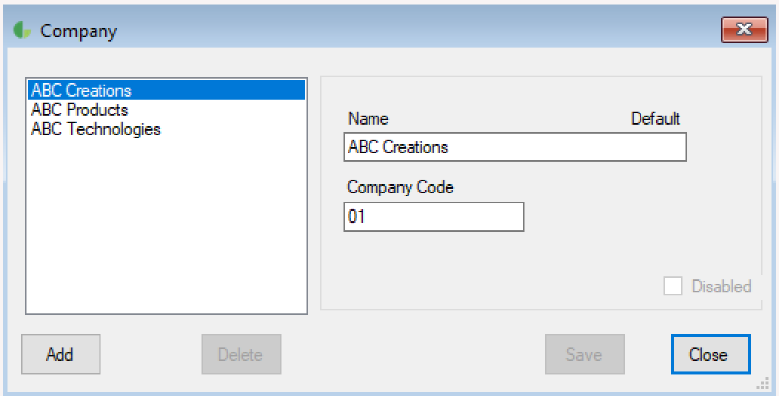
It is a good idea to populate the Department, Class, Occupation, Company and Site fields with information before you add your employees. Then assign each employee to his/her relevant detail. This is important as groups of employees may be established later on using these characteristics during reporting. You can change these names, explained in the Configuration manual, for example one could change ‘Occupation’ to ‘Function’.

To add a Department, Class, Occupation, Company or Site; click ‘**Setup**’ from the menu bar and then ‘**Employee Fields**’. Then select **Department**, **Class**, **Occupation**, **Company** or **Site** and click ‘**Add**’.

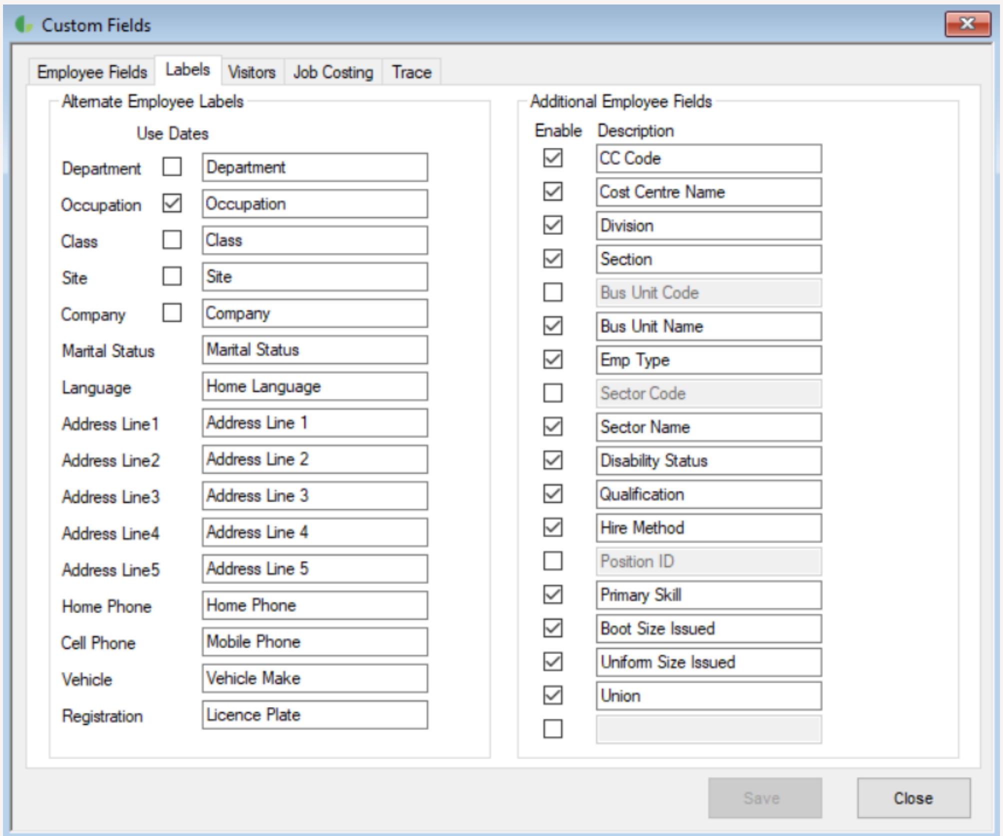
Enter the name and short name (short names are used later in reports).

These entries can be deleted and modified from the same window.



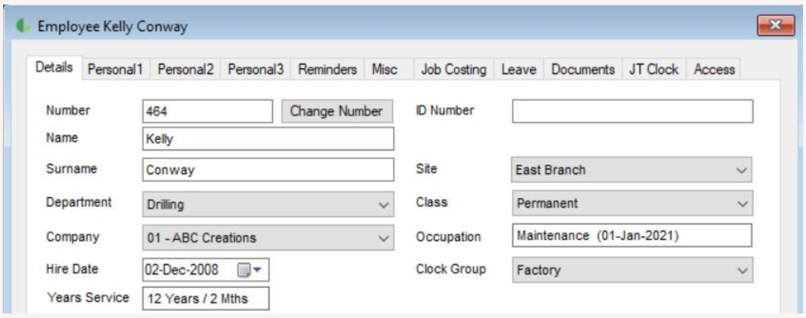


These fields can be set to become date driven, from the **Labels** tab, reached from '**Setup**' on the menu and then '**Custom Fields**'. Place a check in the box under **Use Dates** next to each field (e.g. Occupation in the image below).

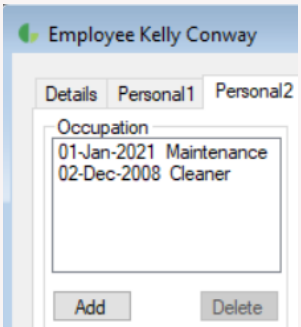


If date-driven options are applied, the currently assigned option will be displayed on the **Details** tab of **Employee Details**, while the option to change it will appear in the **Personal2** tab. Changing the assigned option works the same way as applying a Shift Pattern or Pay Group.

Displayed label for **Occupation**:



Assignment option for **Occupation**:



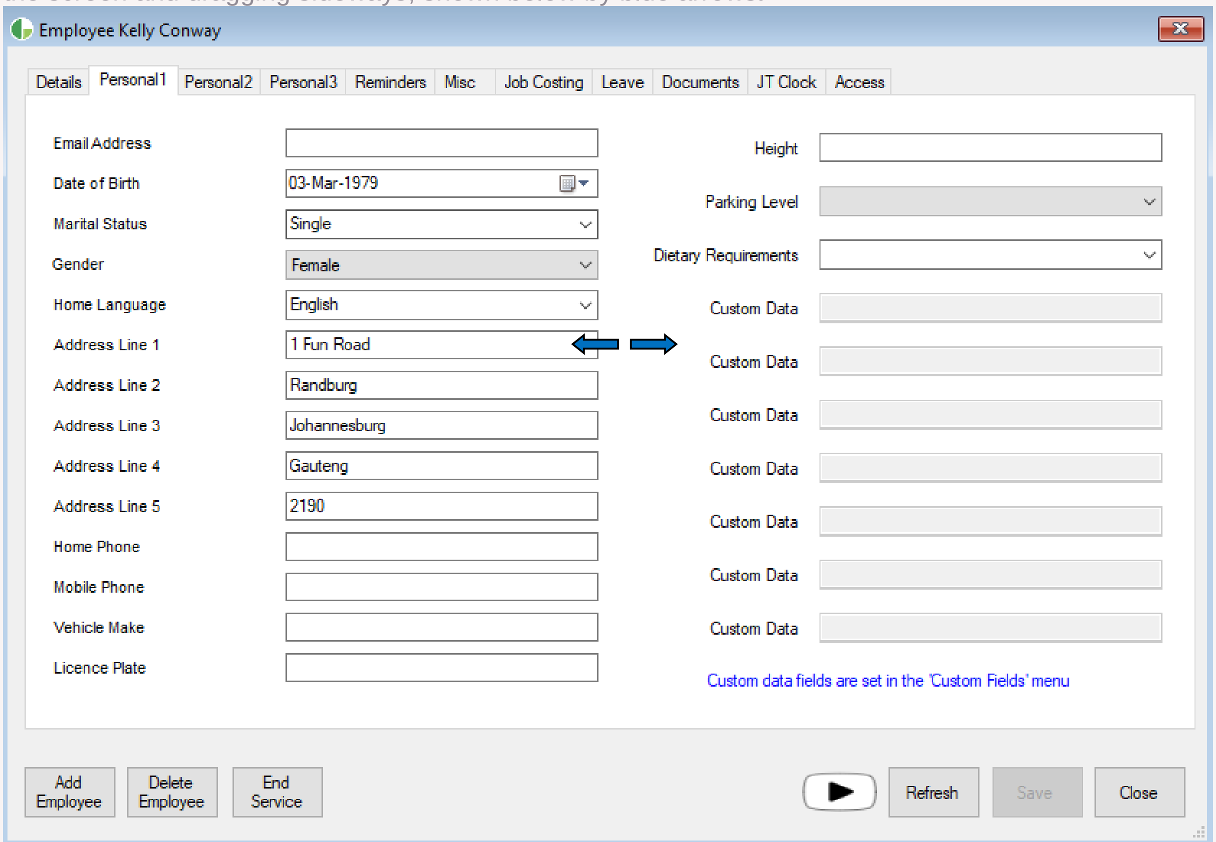
Reports pulled for this employee up until 1 January 2021 would reflect the **Occupation** as being Cleaner, after that date **Occupation** would reflect as Maintenance. The display label on the **Details** tab updates similarly.

Personal

On the **Personal1** tab, there are fields available to store extra information for each employee. There are additional **Custom** fields**,** for any information that might pertain to your company or site. These can be created and modified in the **Employees Fields** tab of the '**Custom Fields**' window from '**Setup**' on the menu bar, explained in the Configuration Manual.

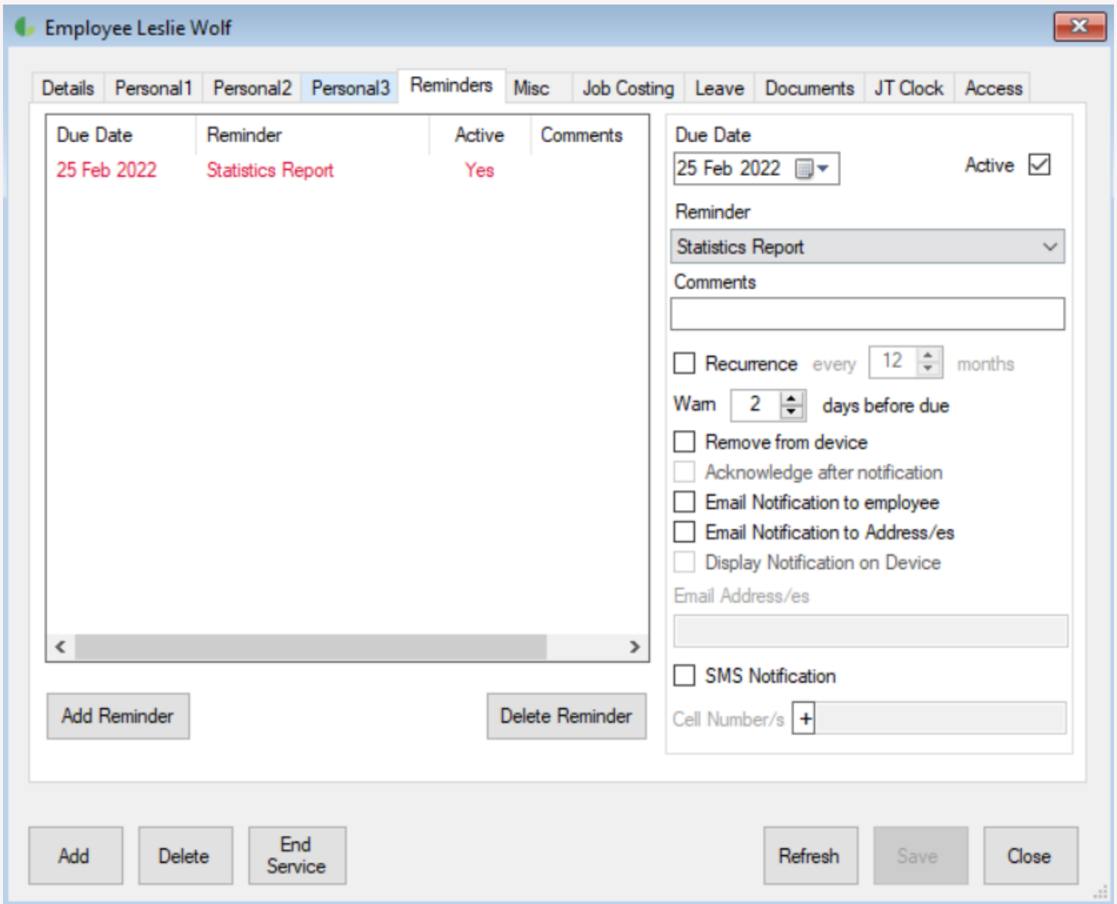
The email address can be used to send automatic email reports directly to the employees, similarly an SMS (text message) report can be sent to cell phone numbers. NB: The cell number must have a +27 (country code) prefix. Multiple numbers must be separated by a semi-colon (;).

You can widen the **Employee Details** window, then size each panel by placing the cursor midway in the screen and dragging sideways, shown below by blue arrows.



Additional Personal tabs will appear if date-driven or additional custom fields are added from '**Setup**', '**Custom Fields**', **Labels** tab.

Reminders



A reminder can be created for an upcoming event for any employee, from the **Reminders** tab. To do this, search for the employee, open **Employee Details** and click on '**Add Reminder**' in the **Reminders** tab. Select the due date for the event and then select the reminder type from the '**Reminder**' list. If the reminder is not in the standard reminders list you can select '**Custom**' and then describe the reminder in the '**Comments**' field.

To add reminders to the standard list, go to '**Setup**' on the menu bar and click '**Reminders**' and then the '**Add**' button.

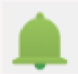
If a reminder will occur on a regular basis for the employee, you can make it re-occur automatically (JT will add the reminder again once it is acknowledged). JT will list the reminder in the **Reminders** window, up to the number of days set here. The reminder will stay listed in the **Reminders** window until it is acknowledged (either in the **Reminders** window or here by deselecting the '**Active**' box).

If a reminder is not acknowledged and '**Remove from Device**' is selected, the employee will be removed from devices (made **Inactive**) by the Device Engine on the due date. This will only work where JT communicates directly with devices.

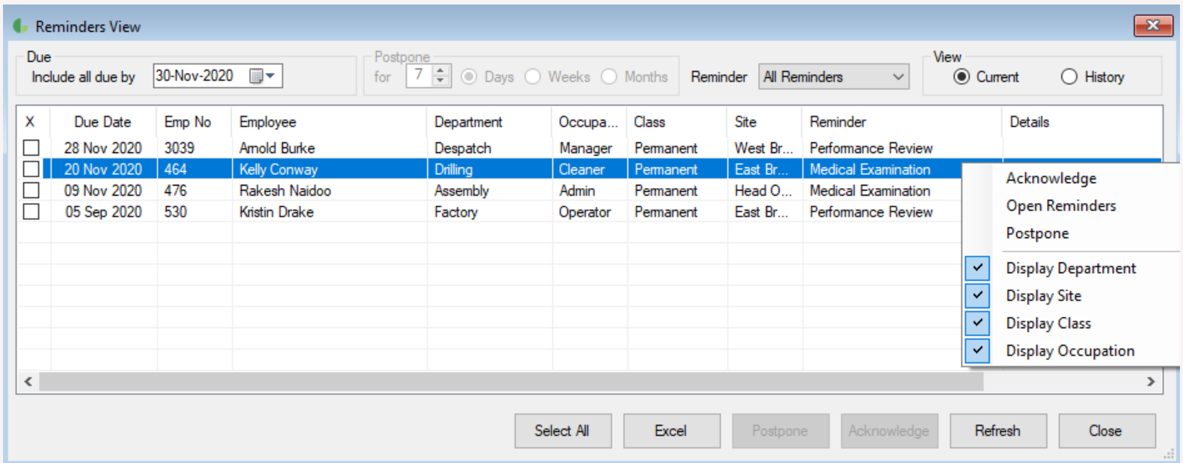
If ‘**Email Notification to employee**’ is selected, a reminder will be sent to the employee using the address entered in the **Personal1** tab. If you select ‘**Email Notification to Address/es**’ or ‘**SMS Notification**’ the Device Engine will email or SMS the reminder to the email address/s or cell phone number/s entered, every day at the set time until the reminder is acknowledged unless ‘**Acknowledge after notification**’ is selected, then it will just email or SMS the reminder once.

‘**Display Notification on Device**’ - compatible devices will show due reminders when employees clock. This option will automatically become available after ‘**Get Device Type**’ has been performed on compatible devices.

Reminders Window



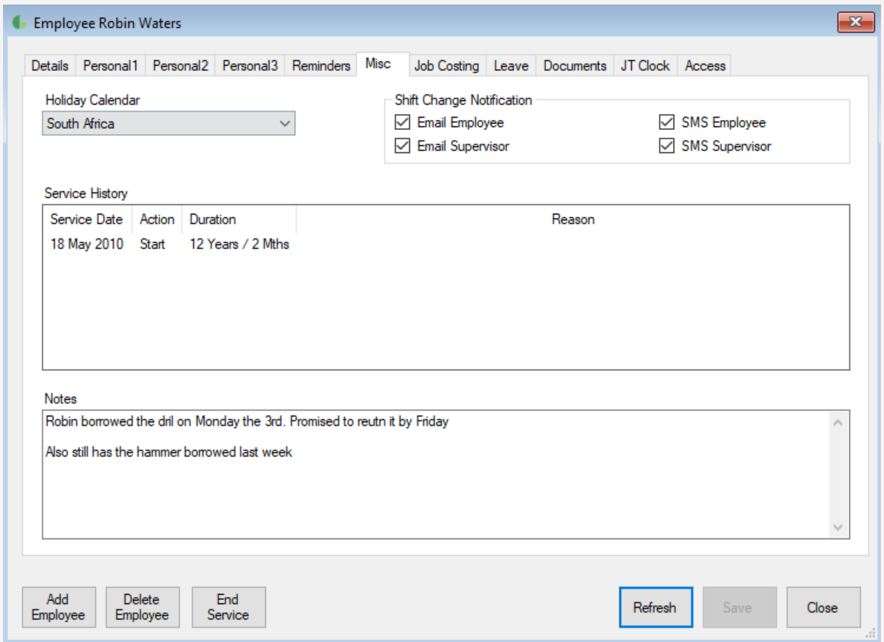
All reminders which are due (or overdue) are listed in this reminders window. The icon on the menu bar will indicate to the user if any reminders are due. Select any reminder/s, then click ‘**Acknowledge**’ or ‘**Postpone**’. ‘**Acknowledge**’ will set the reminder to ‘**Not Active**’ in the employee window where the history is kept. If you ‘**Postpone**’ the selected reminder/s it will change the due date into the future and is listed again, according to the ‘**Warn before**’ number of days before the due date. Reminders are created in the **Employee Details** window. Commonly used (regular) reminders can be created in the ‘**Reminders**’ window, accessed under the ‘**Setup**’ menu item.



Right-clicking anywhere within the window will present a context menu which allows for postponement or acknowledgement of reminders, or allows Employee Detail fields to be added as columns in the window.

Misc

There is a **Misc** tab which contains other employee information



The **Holiday Calendar** to be applied to the employee can also be selected here. By default, employees are placed on the South African holiday calendar scheme. More can be added from '**Setup'**, '**Public Holidays**'.

If **Shift Change Notifications** have been enabled, the options will appear on this tab. If checked these will send emails and/or SMSes advising the employee and/or supervisor that an alternate day program has been scheduled, provided the employee and supervisor have valid mobile phone and email addresses entered on the **Personal** tab (An SMTP and/or SMS service provider need to be configured from System Configuration).

The employee's service history will be shown on this tab as well.

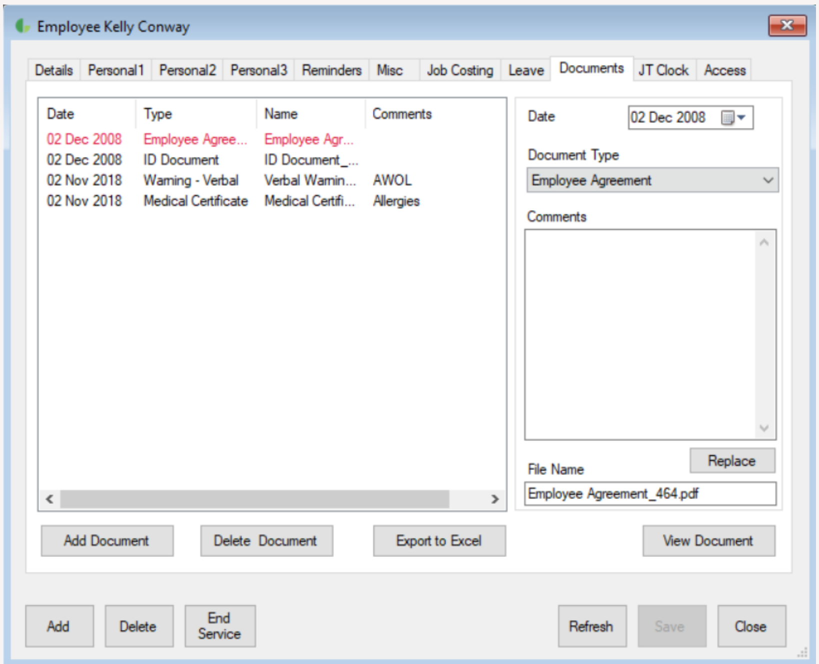
There is also the **Notes** facility for adding any text notes you wish to keep stored for each employee. Simply enter text in the Notes field and click '**Save**'. These notes can be viewed at any stage from this window.

Note: This text can be edited by any user with access to **Employee Details**.

Also note that the keyboard shortcut <Control><s> will save as well, and is available on any screen that has a **Save** button.

Documents

Files may be uploaded and attached to employee profiles. Any type of file may be added.



A '**Document Type**' may be selected, to categorize the file. Document types can be added or removed by going to '**Setup**', '**Document Types**'.

To add a file click '**Add Document**' and browse to the file you wish to add. Comments may be added in the **Comments** field, and a date can be applied. Then click '**Save**'.

To remove a file, select it and click '**Delete Document**', then '**Save**'.

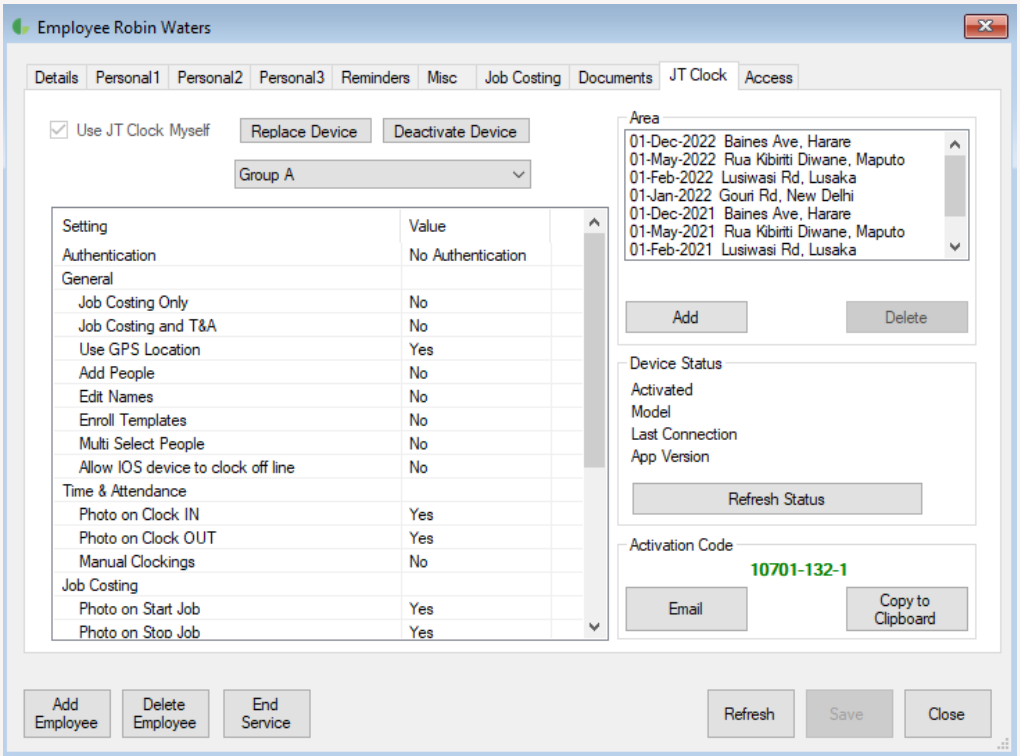
An existing file can be replaced by clicking '**Replace**'.

'**Export to Excel**' will send the listing details of uploaded documents into Excel.

Clicking '**View Document**' will attempt to open the file using the application Windows associates with the file type.

JT Clock

This tab allows for application of JT Clock Myself settings on individuals.



If the employee is to be clocking using **JT Clock Myself**, the upper left checkbox must be ticked. Then a **Device Setting** must be applied and a clocking **Area** should be assigned (setup of these options is covered in this manual and the Configuration manual). The employee must also be marked as **Active** from the **Access** tab.

Clicking the '**Email**' button will generate an email with the activation code and instructions how to apply. '**Copy to Clipboard**' can be used to copy the activation code and instructions to the clipboard to paste somewhere else.

Once the mobile device is registered and connected, its status will be retrievable by clicking '**Refresh Status**'.

Note the **Registration Code** in green, which will need to be entered on the device (including dashes).

'**Deactivate Device**' should be clicked if the currently-registered device should no longer be active in the system.

'**Replace Device**' will become available once a device is registered, and the purpose is to allow a currently-registered device to be replaced by another device. The original device will be deactivated.

Access

The **Access** tab has two further sub-tabs, **Enrollment** and **Access Group**.

The **Enrollment** tab is where fingerprint capturing takes place, the Access Group assigns device access to individuals and determines zone sequencing and anti-passback if these options are enabled in the system. The Device Engine will remove and/or add the employee's templates from/to the readers per settings on this tab. The Access tab will not appear if no devices have been licensed for the user.

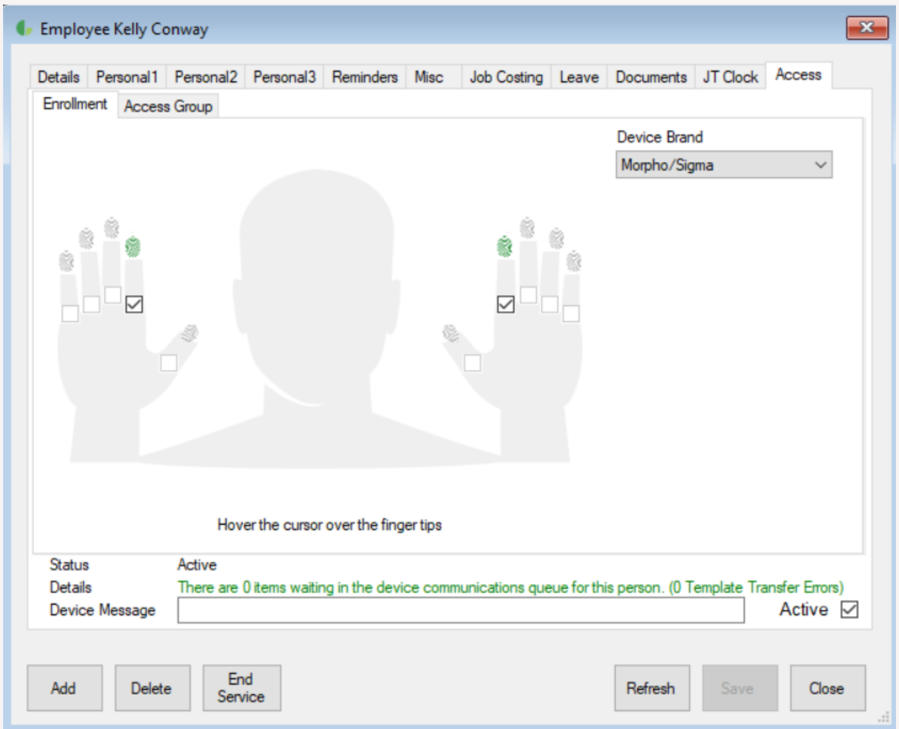
The best way to enroll an employee's fingerprints is to ensure that their fingers are clean and dry, and then ask the employee to add some facial oil onto their finger. This can be done by wiping their finger anywhere on their face (the forehead also works well). This makes the print bolder for the enrollment process. Now click on the circle above the desired finger to scan. Depending on enrollment configuration, the employee may have to present his or her finger several times.

With Morpho readers the enrollment must be done on two fingers. It is recommend to use the index, middle or ring finger as the small finger has less surface area for the system to read, but if need be it can still work. Select at least two of the enrolled fingers to be the "clocking" fingers by clicking in the small check box. These will be the two fingerprint templates that are sent to the device/s. Either of the two enrolled fingers can be used on the fingerprint readers to clock.

The fingerprint symbol will be dark grey for an enrolled finger, light grey for no enrollment and **green** for the active clocking fingers.

Fingerprints can be re-captured if need be, without affecting the existing details. Hover over the circles to see the enrolled date and quality (note that imported fingerprints and certain manufacturer models may not display enrolled date and quality. If you have Mifare card readers on Morpho (Sagem) devices, you may select '**Use Mifare Card**' and JT will use a card as opposed to fingerprints for that particular employee.

The '**Device Message**' field allows a custom message to be displayed on devices for this individual. (Only for Sigma devices.)



The **Device Brand** dropdown list will allow you to select the brand you wish to enroll for if more than one manufacturer of biometric clocking device is in the system.

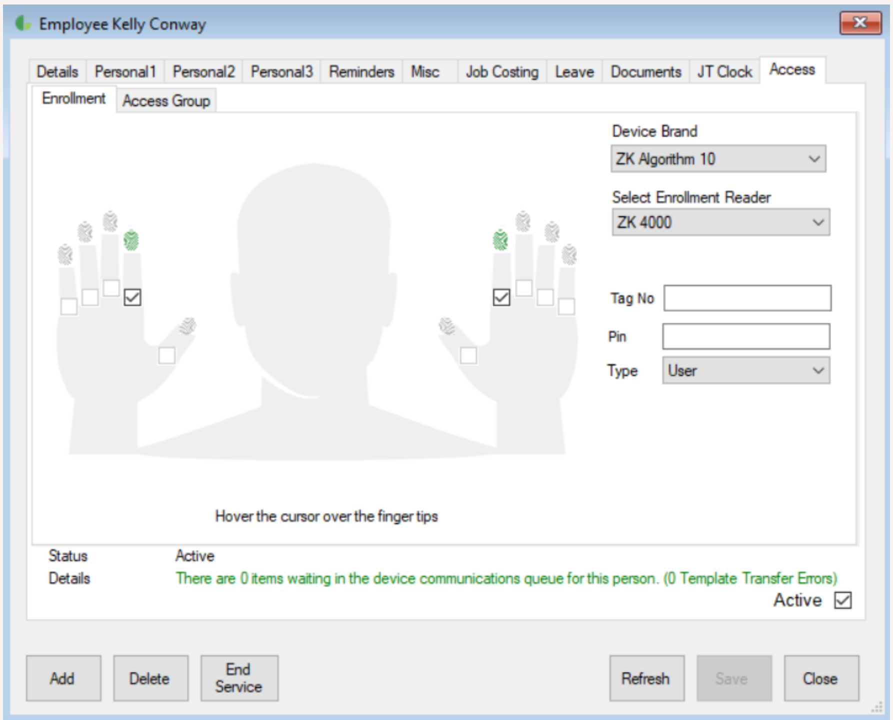
Some biometric devices can cater for a tag and/or pin with a '**Type**' of enrollment too. If such options are available on the device/s Jarrison Time will allow you to allocate a PIN and/or tag to the employee.

Depending on the device it may also be possible (and indeed advisable) to set users as device administrators.

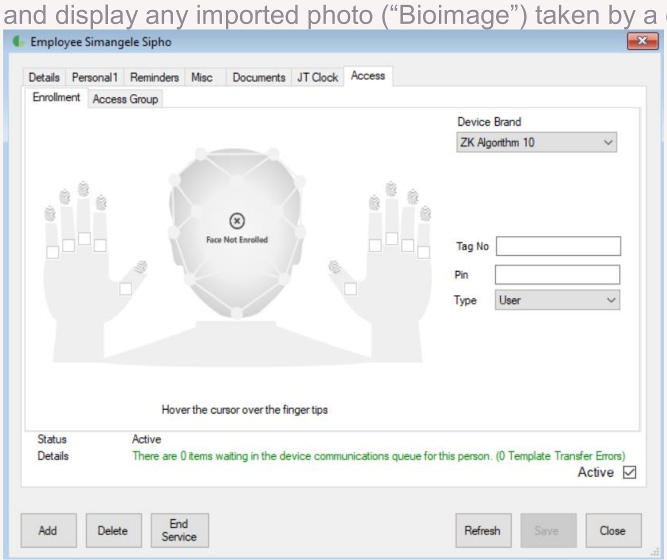
In the next image the '**Show enrollment reader**' option has been enabled from **System Configuration**, and the 'ZK4000' has been selected as the enrollment device.

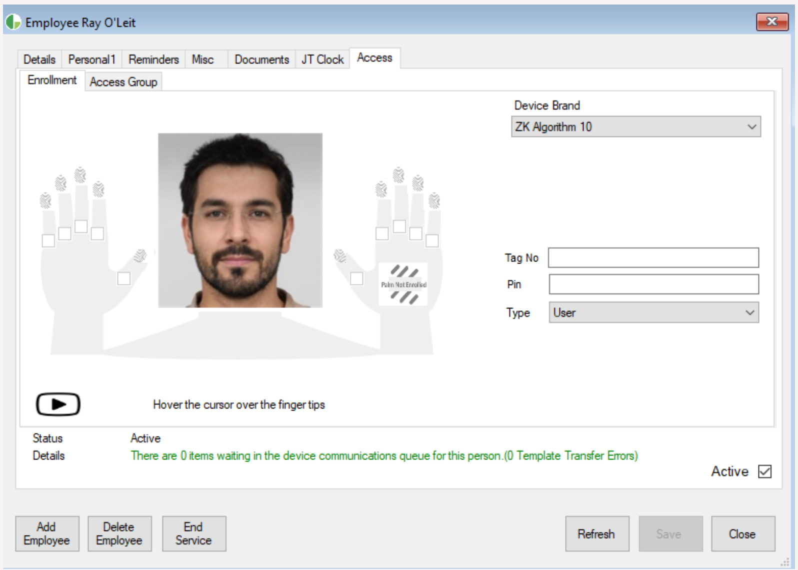
Also present are **Tag No** and **Pin** fields, and the drop-down box that allows administrator privilege to be set.

The manufacturer is set to ZK where above it is set to Morpho/Sigma.

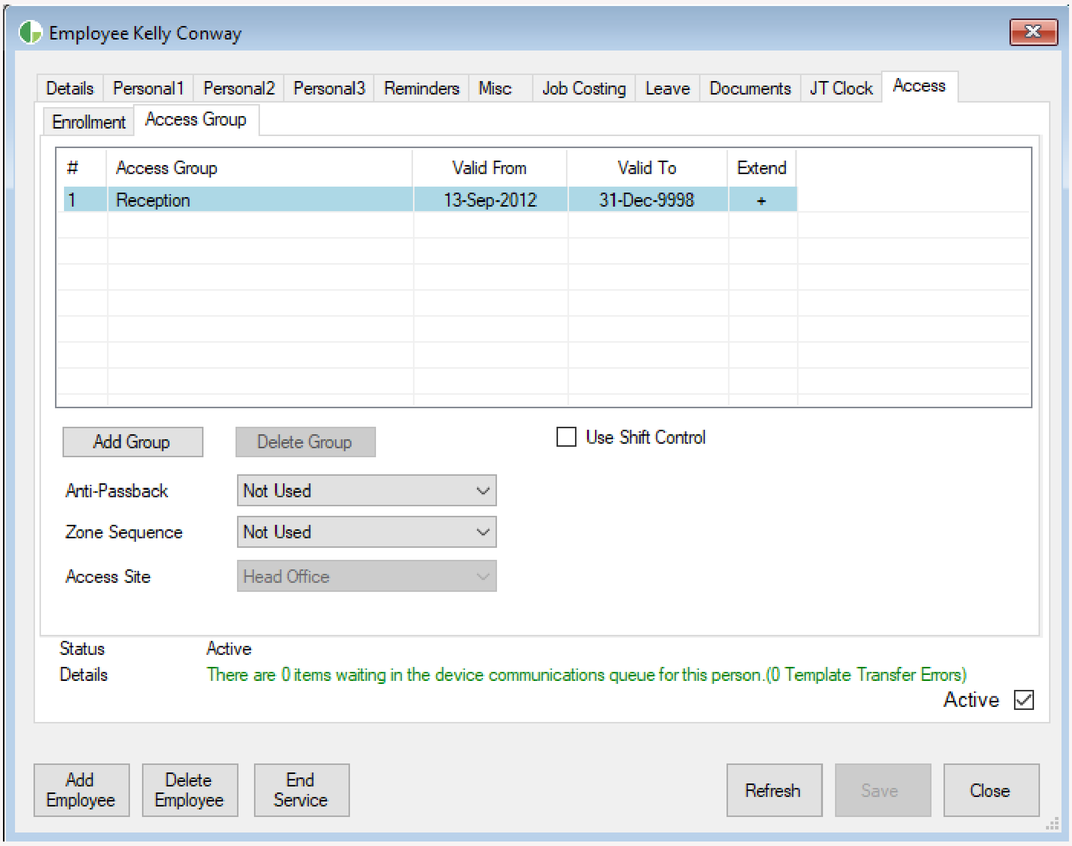


For some models that allow for it e.g. ZKTeco Speedface the screen will appear slightly differently, and display any imported photo ("Bioimage") taken by a compatible device.



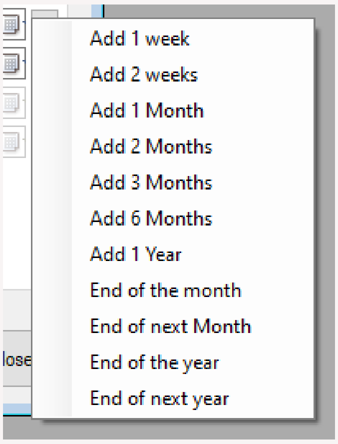


Then go to **Access Group** to apply the **Access Groups** that the person will belong to for the specified durations.



Click ‘**Add Group**’ to choose from the list of access groups that have been configured.

Clicking the Plus button next to the **Valid to** date field will set the **Valid to** date forward according to the value set for the **Configuration**, **System**, **Misc**, **Access Group Change** setting (see Configuration manual for more info). Right-clicking a Plus button will produce a menu of date setting options, per image to the right.

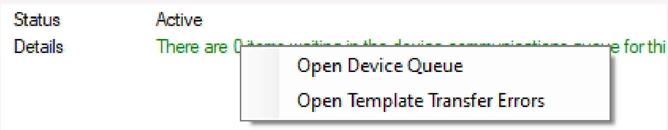


Unnecessary access groups can be removed by selecting and clicking ‘**Delete Group**’.

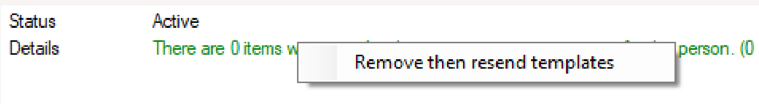
Ensure that the tick box for ‘**Active**’ is selected for the person to be added to the designated readers. If unchecked the person will not be added to any readers and all access will be denied.

Use Shift Control - will be available if the Shift Control module is enabled in Registration. Please see the Shift Control manual for further information on use. If Shift Control is in use, **Access Times** will override **Access Group** settings.

If any fingerprints are not successfully sent to a device, an entry will be present in the **Template Transfer Errors** window, found under the ‘**Access**’ menu option, and also indicated by an exclamation icon in the status bar. Double-click an entry to go directly to the employee, and then re-enroll the employee. The same information will also show on the **Enrollment** tab, next to **Details** (green text in above image). If there was an error the text will change colour. Clicking on the text will present menu shortcuts.

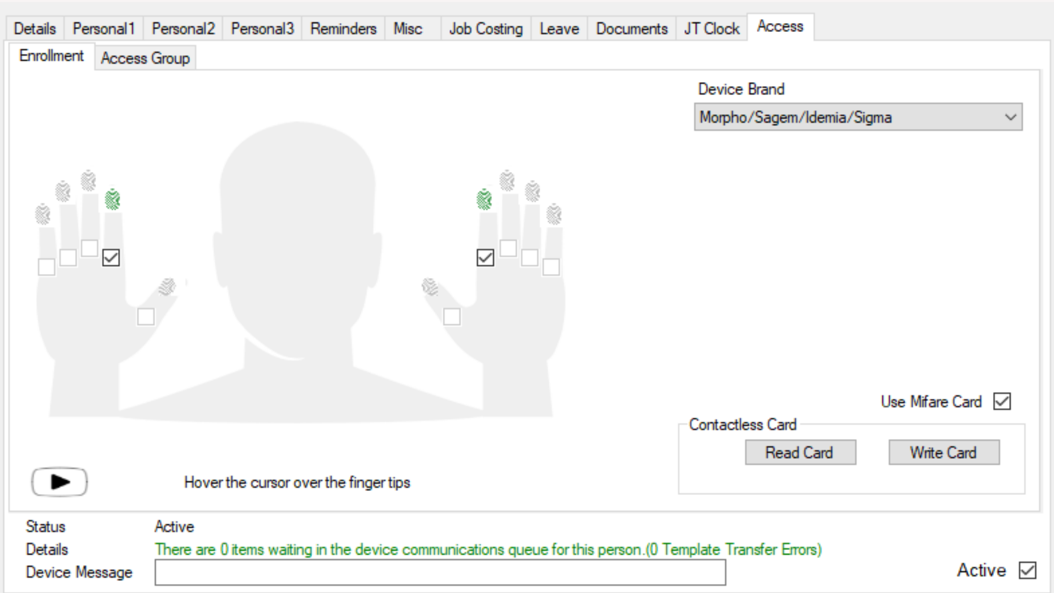


Right-clicking on the line (or any of the labels) presents an option to remove and then resend the employee’s templates to devices.

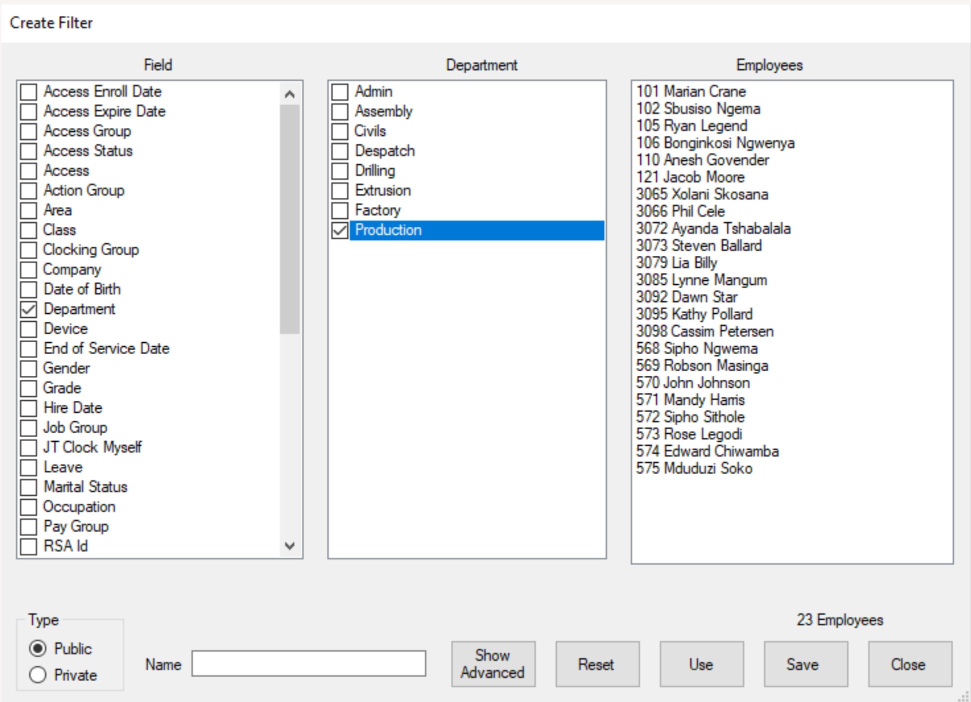


The **Status** line above advises on whether the employee is still in the queue or has been transferred to devices.

If cards are enabled an employee may use a card on the fingerprint reader (if it has Mifare functionality and has been configured). Place the card on the USB encoder and select '**Write Card**'. To read a card select '**Read Card**'.



Filters



Filters are used to create and make use of specific groups of employees, based on fields in the **Employee Details** window.

Creating a Filter

1. Click on '**View**' then '**Filters**' from the menu bar, or click the filter icon on the toolbar.

2. Click '**Create**' to open the **Create Filter** window.

3. Select the characteristic you would like to group employees by, in the **Field** list. (E.g. Department)

4. This will now list all of the existing types of that field, in the middle block.

5. Click on the desired items from the middle block, a tick will appear in the checkbox and the employees matching the selection will be listed in the **Employees** list on the right. Right-click to select or deselect all items at once.

6. To filter according to further fields, simply repeat from step 3.

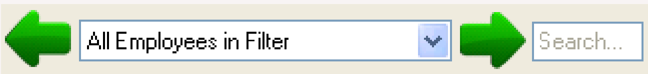
7. To save the filter for future use, type a name for your new filter in the '**Name**' field at the bottom of the window, then click '**Save**'. Otherwise you can click '**Use**', to use the filter temporarily without saving. It is also possible to shift or control select employees for temporary filter use.

8. Before saving, choose '**Private**' or '**Public**'. Private filters will only be available to the current user; public filters will be available to all users.

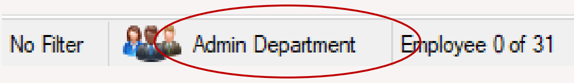
Loading/Unloading a Filter

1. Click on '**View**' then '**Filters**' from the menu bar.

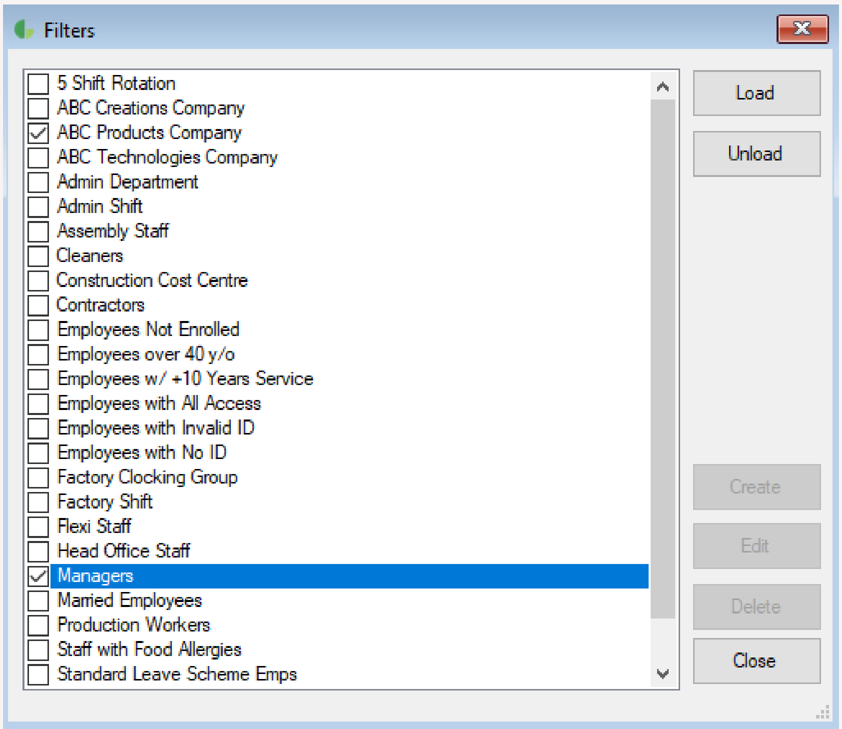
2. Double-click the desired filter or select and click '**Load**'. This will insert all employees matching the filter conditions into the employee list. The employee list will now only allow all employees in the filter to be selected, as opposed to all employees in list.



3. To unload a filter, click on '**Unload**', this will put ALL employees back into the list.



4. The filter currently loaded is in the status bar next to the filter icon.



5. More than one filter can be loaded at a time. To do this, as in the image below, simply place a tick in the box next to each filter you want to load and click '**Load**'. The status bar will indicate more than one filter has been applied, as below.

By selecting a filter and right-clicking it can be copied to User Filters.

Editing a Filter

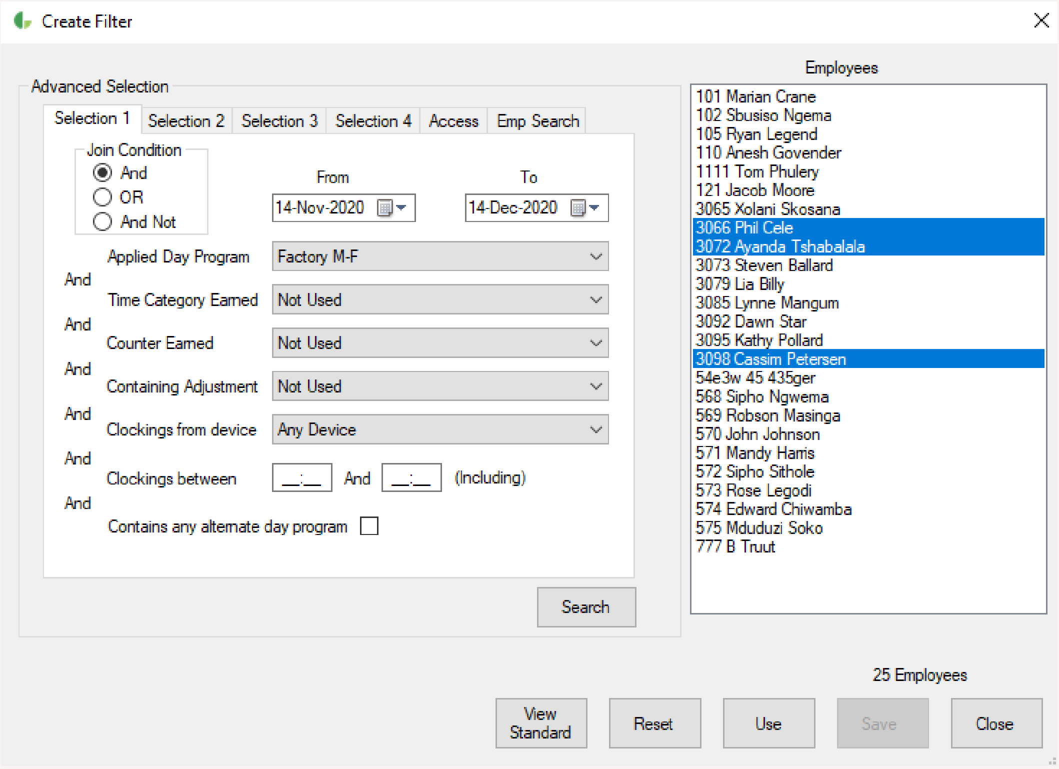
1. Click on '**View**' then '**Filters**' from the menu bar.

2. Click '**Edit**', the **Edit Filter** window will open.

3. Modify the filter in the same manner as creating a filter.

4. The '**Reset**' button will clear all conditions set and allow you to start over.

Advanced Filters



Further filtering can be implemented on the current employee list using the **Advanced** section of filters, by clicking the '**Show Advanced**' button on the normal **Create Filter** window. This additional filtering is useful for selecting all staff who worked on a specific shift e.g., during the selected date range, or to further that, who achieved a specific time category.

These advanced selections will be combined with the selections made in the **Standard** section.

The **Join Condition** on **Selection** 1 specifies the relationship between the **Standard** and all **Advanced** selections. The **Join Conditions** on tabs **2**, **3** and **4** identify the relationship between each of the other tabs.

Within each selection tab there are five categories available for further filtering; Day Programs, Time Categories, Counters, Manual Adjustments and Clockings. These options, within each individual selection are always joined using the **And** condition.

You can click on '**Search**' at any stage of the selections to monitor which employees match the selections, displayed in the list on the right-hand side. Results can then be further selected via <Ctrl> or <Shift> clicking.

Applied Day Program - This will list all employees who have been allocated to the selected day program for the date range.

Time Category Earned - Lists all employees who have been allocated any time for the particular category for the date range.

Counter Earned - Lists all employees who have been allocated the particular counter for the date range.

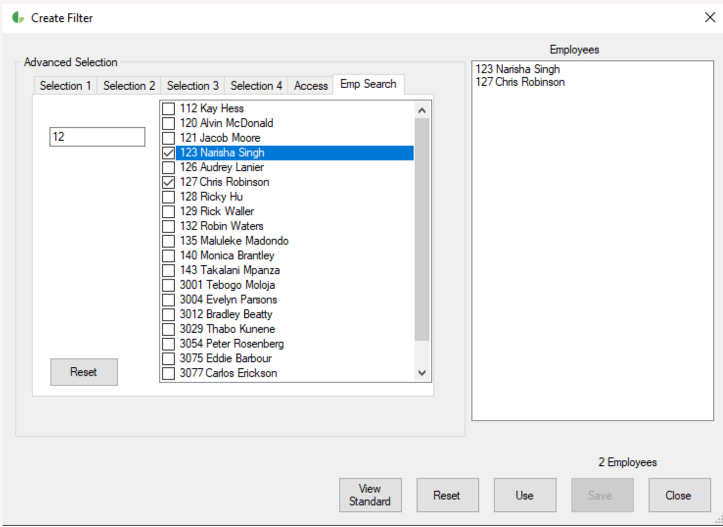
Containing Adjustment - Lists all employees who have had the particular adjustment added any time during the date range.

Clockings from device - Lists only employees who have clockings from a particular device.

Clockings between - Lists all employees who have clockings between (including) the entered times, for all of the dates specified.

Contains any alternate day program - Lists all employees who have had an alternate day program assigned to them.

The **Access** tab allows for filtering based on Access Group validity.



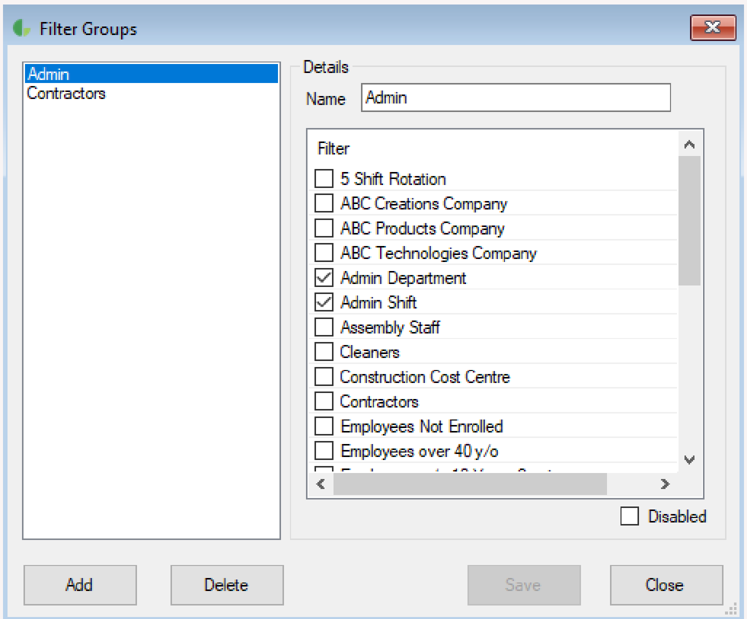
The final tab, **Emp Search**, allows for searching and selecting of specific employees.

By entering some characters in the left-side field, employees whose name or employee number matches the typed entry will be presented. From this resulting list, anyone marked with a tick will appear in the filter. After selections have been made further searches can be initiated and their results appended to the selections.

Filter Groups

Filter groups enable selected filters to be grouped together and assigned to users, limiting specific users to only use specific filters. Click '**Add**' to add a new group, and then select the filters which that group will be able to use.

When setting up the user account (see the **User Profiles** section of the Configuration manual for more) the appropriate filter group for each user can be assigned.

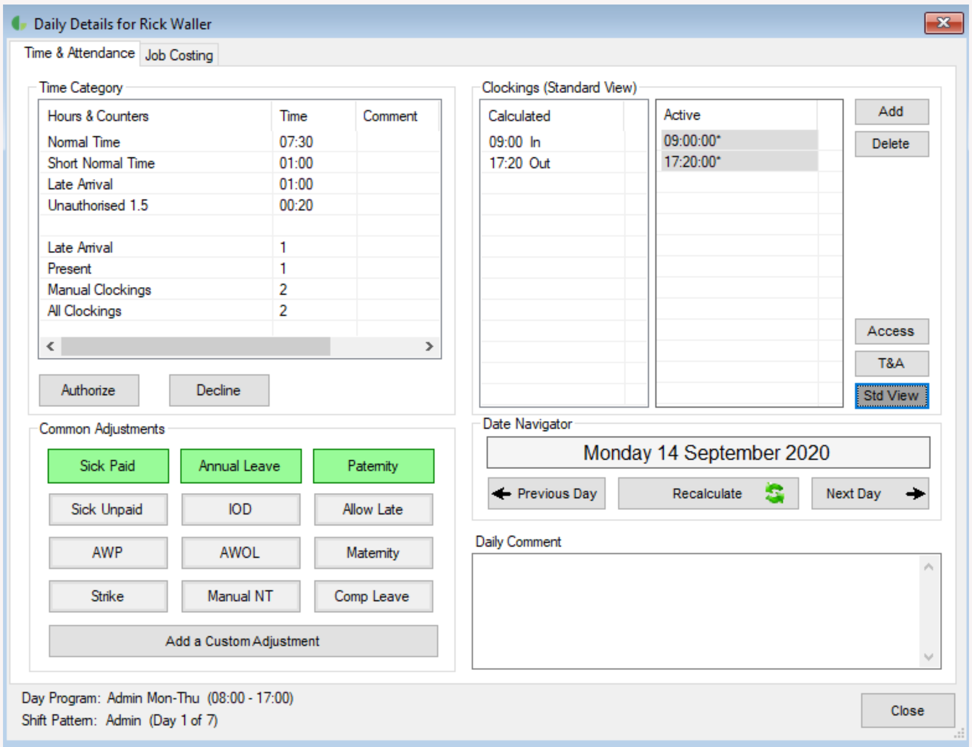


Users will need to log out and back in to see changes.

Daily Details

Click on '**View**' then '**Daily Details**' from the menu bar, or click on the icon on the toolbar. The **Daily Details** window applies to the person selected in the employee list, and it's broken into four sections. The upper-right quadrant deals with the clockings for the selected person on the selected day. The upper-left quadrant presents the assigned time or adjustment categories. The lower left section of the window is where adjustments are applied, and the lower right section allows date or day navigation, and contains the '**Recalculate**' button.

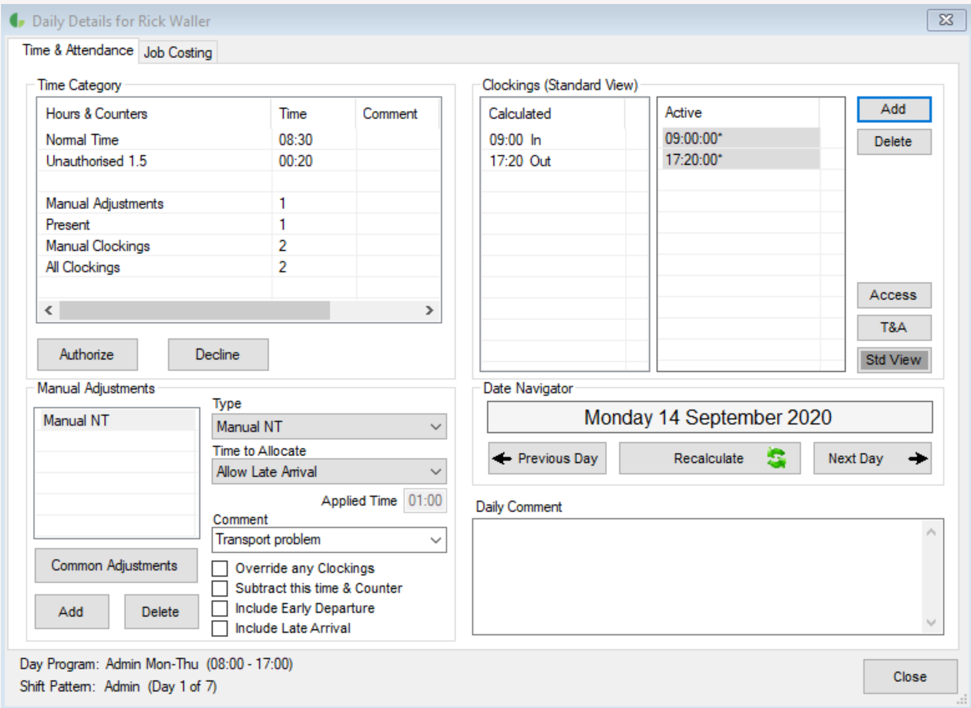
The name of the Shift Pattern that has been assigned to the employee is displayed in the bottom left corner of the **Daily Details** window, with the particular Day Program being applied for the day also shown (shift start and end times will be in parenthesis whether they are part of the Day Program name or not). Double-clicking on either of these will open the respective configuration window. The input field for '**Daily Comment**' allows for up to 2000 characters of text to be entered. Note that reports will not wrap this text, so if printing is desired it is advisable to send the report to Excel and format from there. Text is auto-saved as soon as **Recalculate** is clicked, or another date is selected (or window closed).



Daily Details E.g. 1
Here is an example before any corrective intervention, using standard view. The employee's clockings show that he was an hour late arriving for his shift (generating the short -time and late arrival categories), and worked twenty minutes past end of shift (generating twenty minutes of unauthorized overtime).

Note the asterisk next to each clocking in the **Active** column, signifying manual entries.

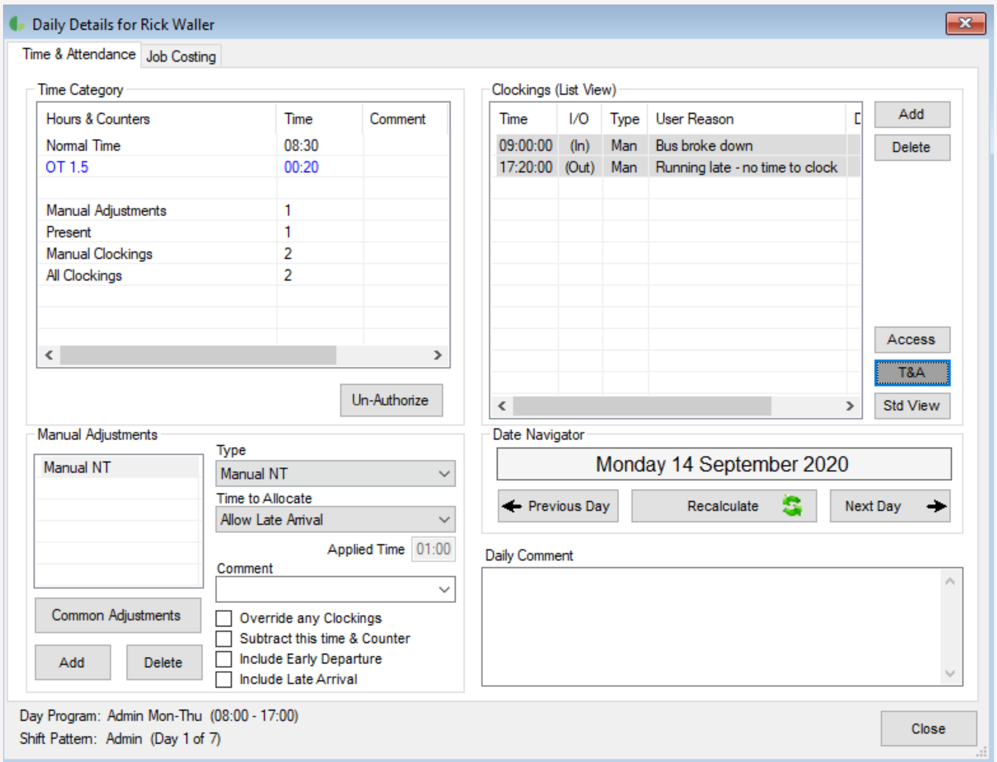
Late Arrival, **Present**, **Manual Clockings** and **All Clockings** are counters which have been incremented.



Daily Details E.g. 2
We now see the result of applying a manual adjustment to allow the late arrival ('**Allow Late**' was clicked). The adjustment added twenty minutes to normal time to complete the expected hours for the day, and short time and late arrival time categories and counters no longer reflect. If it was desired to still show the late arrival having occurred, '**Include Late Arrival**' would be ticked.

The counter for **Manual Adjustments** has been incremented (because an adjustment was performed).

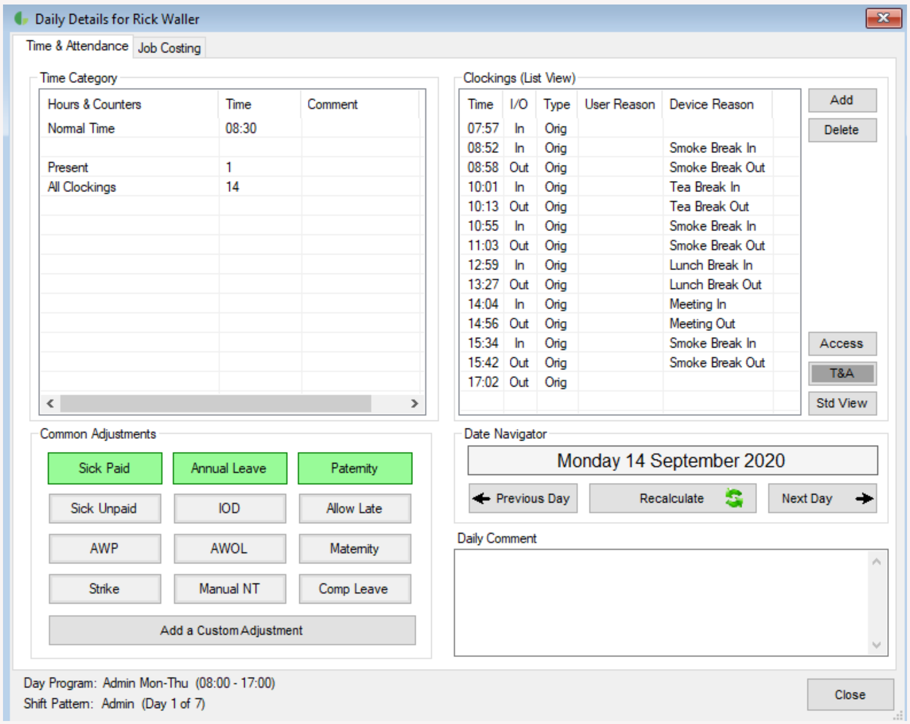
Note that adjustment comments can be predefined, and users can be prevented from entering reasons of their choosing.



Daily Details E.g. 3

The unauthorized OT1.5 has been authorized (now highlighted in blue), and the T&A view has been applied to show reasons. The '**Authorize**' and '**Decline**' buttons have been replaced by the '**Un-Authorize**' button. If the overtime is unauthorized by clicking this button, the '**Authorize**' and '**Decline**' buttons seen previously will re-appear.

If Morpho devices with screens are in use it is also possible to setup **Clocking Reasons** (see Configuration manual for more). If **Clocking Reasons** are being used, they can be seen from the **T&A** view under **Device Reason**.



Date Navigator

The date containing the clockings, totals and adjustments for the day is displayed in the bottom right-hand quarter of the window.

Non-working days will show as blue text, public holidays will show green text.

To view the previous day, click the left arrow or press F4 on the keyboard. To view the next day, click the right arrow or press F5 on the keyboard.

To view a specific date, click the date or day and then select the date from the calendar that appears.

Results

This block displays the Time Categories and Counters allocated to the specific day. It will also display the reason, if entered, for any authorized overtime

These allocated times and counters are calculated by applying the daily shift rules to the clockings for each day.

If overtime authorization is being implemented, one can authorize all unauthorized overtime for that day, by clicking the '**Authorize**' button. If an employee has achieved more than one type of unauthorized overtime in a single day, you can authorize separately by double-clicking on the time. To unauthorize all incorrectly authorized overtime, click the '**Un-Authorize**' button, or double-click the incorrect authorized overtime categories separately.

OT reasons, if applied via **Overtime Authorization**, can be viewed by dragging out the columns as needed.

Clockings

The clockings window displays **Original**, **Active** or **Calculated** clockings. To display **Calculated** clockings, click somewhere in the column for **Original**, and again to toggle back.

Original clockings are those collected directly from the hardware or external access control database and cannot be permanently deleted. When an original clocking is deleted, it is marked with an asterisk (*), and will not be used in any calculations. Original clockings may be shown as '**In**' or '**Out**', directly from the hardware or external access control database, but these directions are NOT used in the calculations, unless '**Enforce paired clockings**' (explained in the Configuration manual) is being implemented.

Jarrison Time identifies the first clocking for the day as 'In' and the next as 'Out' and the next as 'In' etc., for all clockings allocated to the day.

Standard view

Active clockings are the combination of original and manual clockings, which are used for calculations.

Calculated clockings are the clockings used for the day's calculation, after applying any revisions and roundings.

To add a manual clocking, click on the '**Add**' button and enter the clocking time, then click '**Save**' or press the Enter key on the keyboard. To add a manual 'Out' clocking for a night shift, which occurs past midnight, navigate to the next day and add the clocking in that day. If you go back to the previous day the clocking will be marked with '*' and '>'. A reason can be added for the manual clocking, or reasons can be predefined and the user will need to select one.

To delete a clocking click on the clocking in the active list, then click the '**Delete**' button (or press <F6> on the keyboard).

(Dup) indicates that a clocking has been identified as a duplicate, configured in the shift setup, and will be ignored in the calculation.

Identifiers:

***** In the Original list indicates a deleted clocking.

***** In the Active list indicates a manual clocking.

> This is a clocking which was clocked in the next day but allocated to this day for calculations (night shift out clocking).

>* This is a manual clocking which was clocked in the next day but allocated to this day for calculations (night shift out clocking).

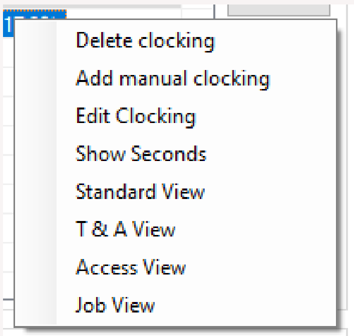
>> This is a clocking which has occurred at least two days in the future but allocated to this day for calculations (only with Dynamic Days).

< This is a clocking which was clocked in the previous day but allocated to this day for calculations (shift starting late at night for today).

<* This is a manual clocking which was clocked in the previous day but allocated to this day for calculations.

^ This is a system-generated “phantom” clocking (extended day frame has been applied).

In Standard or T&A view there is a right-click context menu as well, with extra options if a clocking is right-clicked on.



T&A view

This view mode will list all of the Original, Manual and Deleted clockings using four columns.

Column one shows the ‘Time’, column two shows the ‘Direction’ (in or out), column three shows the ‘Type’ (manual or original), column four shows the **Reason** if entered by the user, and column 5 will display reasons selected on the device by the employee. You can right-click to add or delete clockings with or without reasons.

To add a manual clocking, click on the ’**Add**’ button then enter the clocking time and a reason if need be, then click ‘**Insert**’ or press the Enter key on the keyboard. To add a manual 'Out' clocking for a night shift, which occurs past midnight, navigate to the next day and add the clocking in that day. If you go back to the previous day the clocking will be marked with an ‘*’ and an ‘>’

To delete a clocking, click on the clocking in the active list, then click the ‘**Delete**’ button (or <Del> on the keyboard).

Recalculate should be done here by clicking the ‘**Recalculate**’ button or <F10> or <*> on the keyboard. See the **Recalculate** section for further information on recalculating.

Identifiers

A purple clocking indicates a deleted clocking.

A highlighted clocking indicates a manual clocking.

A **>** indicates a clocking which was clocked in the next day but allocated to this day for calculations (night shift out clocking).

A **>>** indicates a clocking which has occurred in the future but allocated to this day for calculations (only with Dynamic Days).

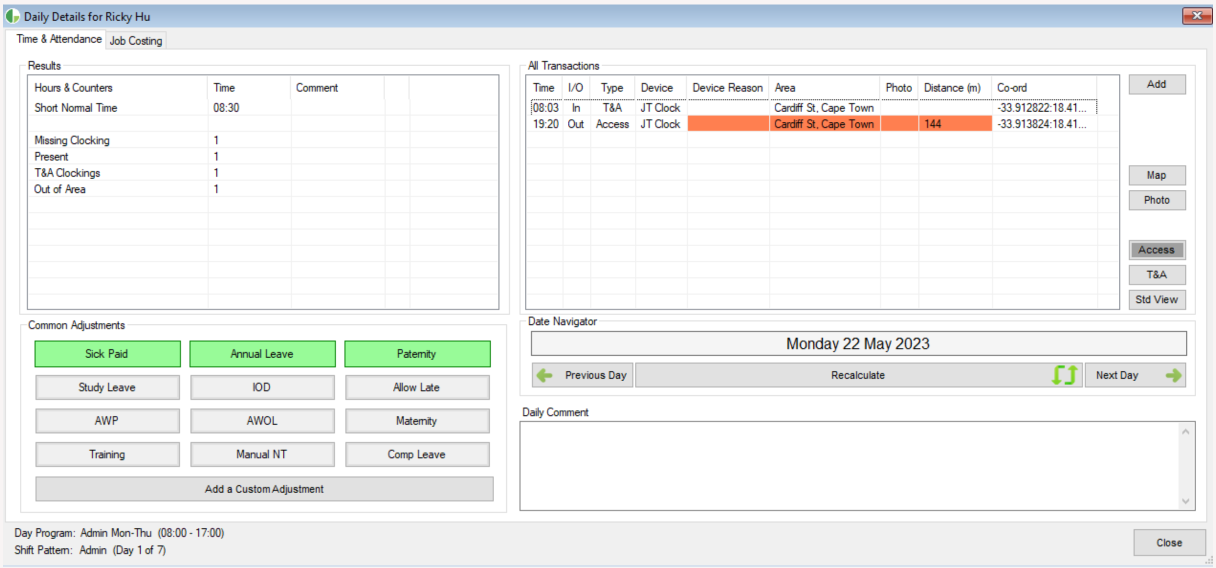
“Dup” indicates a clocking that is not contributing towards T&A results, per Day Program settings.

“A.Dup” indicates a duplicated clocking that occurred on a device with the duplicate override option enabled.

Access view

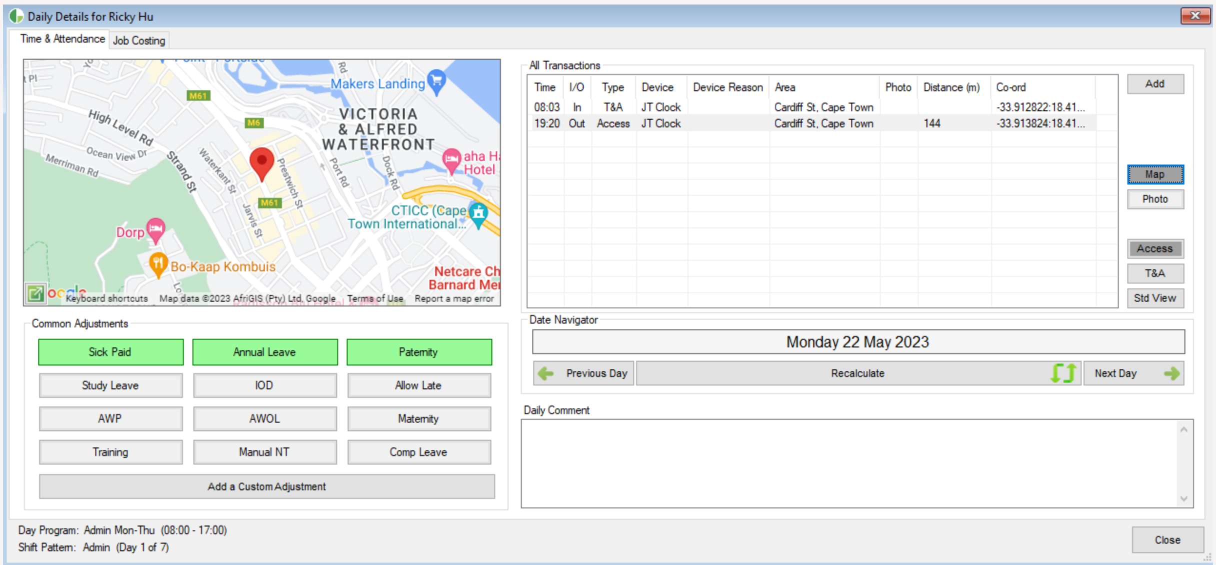
This view mode will list all of the clockings from hardware using four columns; time, direction, type (access or T&A), and the device name the clocking was generated on.

If the JT Clock module is activated clicking on ‘**Access**’ will present two further buttons, ‘**Map**’ and ‘**Photo**’. Additional columns will present related information; Location, Photo, and Distance. If the location and distance values do not display properly, please check Windows Regional settings (per Installation manual).

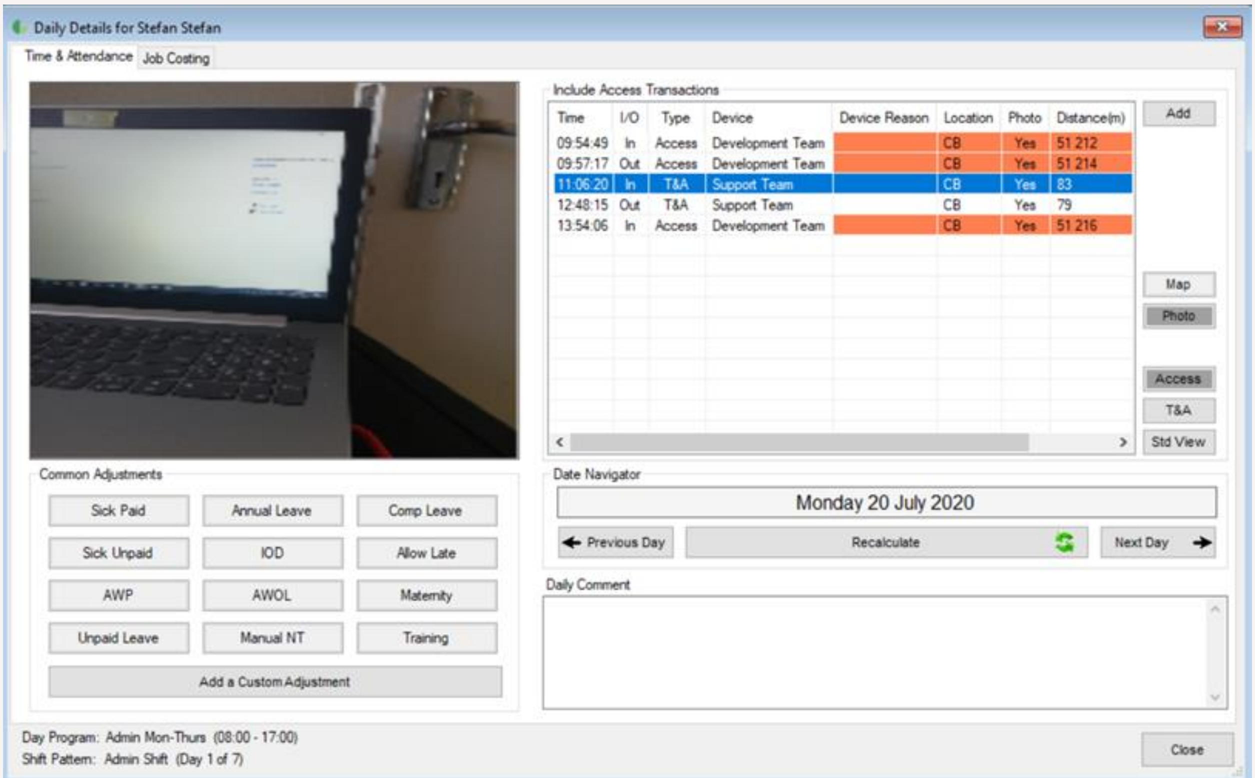


Note the orange highlighted clockings are exceptions (clocked out of defined area). By right-clicking on one of these clockings the user can choose to change the clocking from Access Control to T&A by '**Accepting the out of area**' exception. Note that if a transaction has been converted and a clocking reimport is done, the clocking will be reset (i.e. not accepted if out of area) and the comments will be removed.

After selecting an out of area (Access) clocking and clicking the '**Map**' button, that clocking's location will be shown (only available for out of area clockings):



After clicking the ‘**Photo**’ button and selecting a clocking that clocking’s associated image will be displayed



Requiring a photo and/or location for clockings are optional settings in JT Clock.

If the system hardware configuration is suitable this view can also present Temperature reading and Face Mask information.

Manual Adjustments

A manual adjustment can be added if an employee is not present or has some time missing. This will record the reason for absence and allocate the necessary time. If an adjustment is not entered the system will keep the employee as absent, and he or she will have short time on the timesheet.

To add a common (regular) adjustment, click on one from the selection on the bottom left-hand side of screen. This will apply the saved parameters for that particular adjustment to the day. These common adjustments can be defined in the '**System Preferences**' window found in the '**Setup**' menu from the menu bar. The creation of these common adjustments is explained in the Configuration manual. If the adjustment is not amongst the common adjustments, one can click the '**Add a Custom Adjustment**' button and select from the complete list of adjustments. (You can type the first letter of the adjustment to navigate to it instantly.)

If the adjustment required is not in this list or not allocating the correct time categories when applied, please contact your supplier to add to or revise the complete adjustment list. Once the custom adjustment is added you will need to select the '**Time to allocate**' from the list.

'**Balance to Target Time**' will allocate the difference of time needed to make up their target time for that particular day.

'**Custom Time**' is used to allocate a fixed specific amount of time. To do this, enter the desired time into the box below. You can also allocate a custom counter, to add or remove a shift count for example.

A '**Comment**' may also be inserted for future reference (sick note number, reason for extra hours etc.). If preset comments have been setup (see Configuration manual for detail on how to do this), preset comments will be available from a drop-down menu.

'**Override any Clockings**', if selected, will ignore all clockings for the day, and only apply the adjustment created.

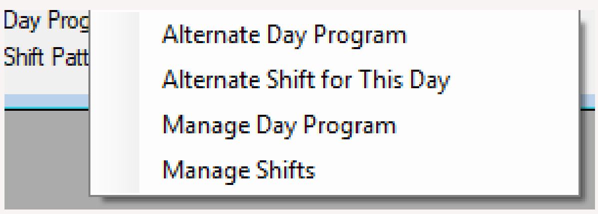
To remove time for the day, select '**Subtract this Time**'.

If Late Arrival and Early Departure times are still required, ensure that '**Include Early Times**' **and** '**Include Late Times**' are selected.

To delete a manual adjustment, navigate to the date of the adjustment for the employee and then on the bottom left-hand side select the adjustment and click '**Delete**'. To add a second adjustment for the same day, click '**Add**' on the bottom left-hand side, or plus <+> on the keyboard and select the type of adjustment from the list and apply the parameters as per normal. To calculate the results, click '**Recalculate**'.

Alternative Day Programs and Shifts

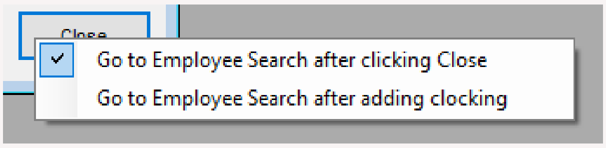
To change the day program or shift pattern assigned to this person, and to change it for this day only, right-click on the '**Day Program**' name and from the context menu which appears, select either '**Alternate Day Program**' which presents a list of all possible Day Programs, or select '**Alternate Shift for This Day**' which presents a list of all possible Shift Patterns. After selecting an alternate day program it will appear in maroon instead of regular black.



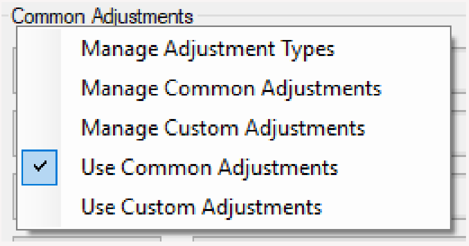
This can be useful in cases where, for example, an employee is off sick so another employee has to fill in the sick individual's shift, for just one day. Another method would be to use the **Day Schedule**, see later section in this manual for further information.

Miscellaneous Options

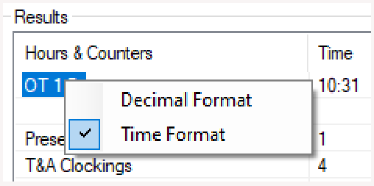
Right-clicking on the **Close** button produces a small context menu with options of how to place the cursor after particular actions.



Right-clicking in an open area of the adjustment shortcuts also has a context menu option to allow editing of various options.



Right-clicking in an open area of the **Results** section allows easy toggling between time and decimal format for results to be presented in.



Overtime Authorization

This feature of Jarrison Time will only be relevant if overtime authorization is necessary and has been configured in the software.

The basic concept behind overtime authorization is to automatically assign all extra time worked by employees to an 'unauthorized' time category. When this extra worked time is approved, the operator can authorize it by converting it to a legitimate overtime time category. In the '**Authorize Overtime**' window, from the '**Action**' menu, all of the unauthorized times are listed for any week. You can easily select which times to authorize or decline, by selecting the box on the left for authorization and then clicking '**Authorize**'. If you want to only authorize a specific amount of time, simply enter the amount in the '**Auth Time**' column. If any alternate time category is required to allocate the overtime to, you can click the '**Authorize Category**' to change it. If an unauthorized time category has an alternate '**Authorize Category**' it will appear in **blue**, and then change to **red** once clicked. All standard overtime authorizations will remain in a **black** font. Any variance from the worked time to the time authorized will show in **red**. Only certain users will have varying levels of permissions to '**Authorize**'.

If granted permission you may '**Select All**', this allows for bulk authorizing (not recommended) or more commonly, for bulk declining of overtime. Declining overtime will convert the unauthorized overtime to the 'Declined overtime' time category. This is done to indicate that the unauthorized time has been processed.

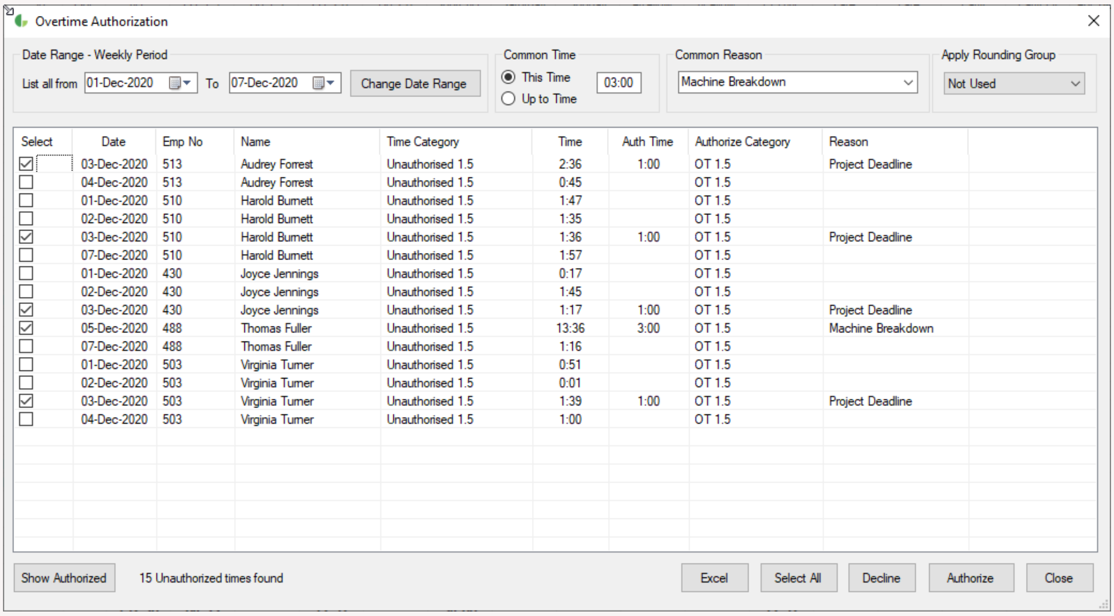
If any Rounding Group is selected then JT will round the OT as you select it, according to the rounding rules. Otherwise JT will suggest the exact amount of unauthorized overtime worked for authorization in the '**Auth Time**' column.

The date ranges work similarly to the **Exceptions** window.

It is possible to authorize multiple employees with the same amount of time by using the **Common Time** option. By selecting '**This Time**' you can assign the time specified in the input field, by selecting '**Up to Time**' you can assign however much overtime the employee has earned, up to the maximum specified in the input field.

If you wish to apply the same authorization reason to many records, fill in the '**Common Reason**' field before selecting records.

A column to display adjustment comments can be shown by right-clicking anywhere in the window and selecting '**Show Adjustment Comments**' from the context menu. The same can be done to display first and last clockings, and departments.

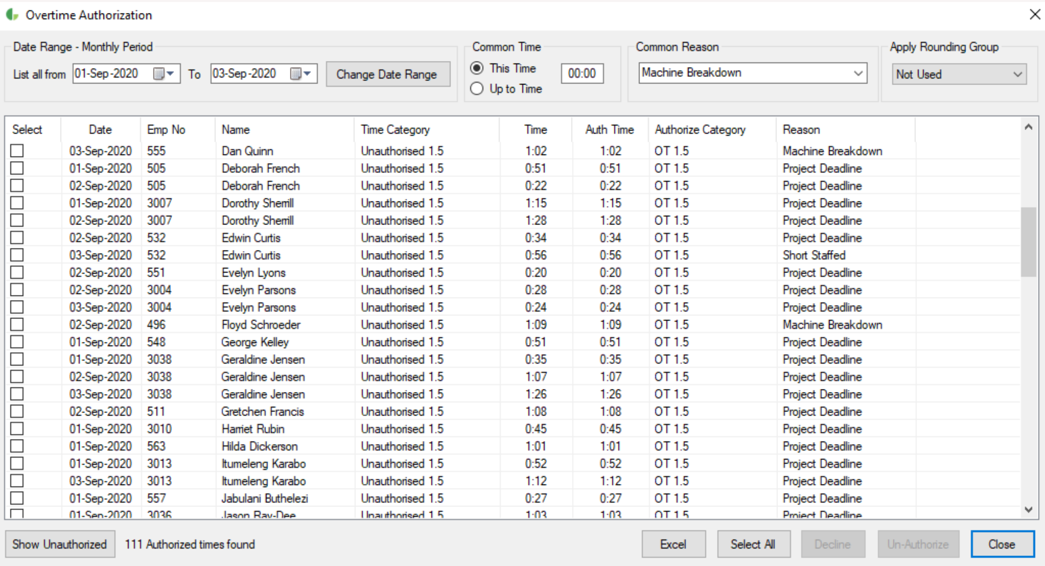


Select	Date	Emp No	Name	Time Category	Time	Auth Time	Authorize Category	Reason
☑	03-Dec-2020	513	Audrey Forrest	Unauthorised 1.5	2:36	1:00	OT 1.5	Project Deadline
☐	04-Dec-2020	513	Audrey Forrest	Unauthorised 1.5	0:45		OT 1.5	
☐	01-Dec-2020	510	Harold Burnett	Unauthorised 1.5	1:47		OT 1.5	
☐	02-Dec-2020	510	Harold Burnett	Unauthorised 1.5	1:35		OT 1.5	
☑	03-Dec-2020	510	Harold Burnett	Unauthorised 1.5	1:36	1:00	OT 1.5	Project Deadline
☐	07-Dec-2020	510	Harold Burnett	Unauthorised 1.5	1:57		OT 1.5	
☐	01-Dec-2020	430	Joyce Jennings	Unauthorised 1.5	0:17		OT 1.5	
☐	02-Dec-2020	430	Joyce Jennings	Unauthorised 1.5	1:45		OT 1.5	
☑	03-Dec-2020	430	Joyce Jennings	Unauthorised 1.5	1:17	1:00	OT 1.5	Project Deadline
☑	05-Dec-2020	488	Thomas Fuller	Unauthorised 1.5	13:36	3:00	OT 1.5	Machine Breakdown
☐	07-Dec-2020	488	Thomas Fuller	Unauthorised 1.5	1:16		OT 1.5	
☐	01-Dec-2020	503	Virginia Turner	Unauthorised 1.5	0:51		OT 1.5	
☐	02-Dec-2020	503	Virginia Turner	Unauthorised 1.5	0:01		OT 1.5	
☑	03-Dec-2020	503	Virginia Turner	Unauthorised 1.5	1:39	1:00	OT 1.5	Project Deadline
☐	04-Dec-2020	503	Virginia Turner	Unauthorised 1.5	1:00		OT 1.5	

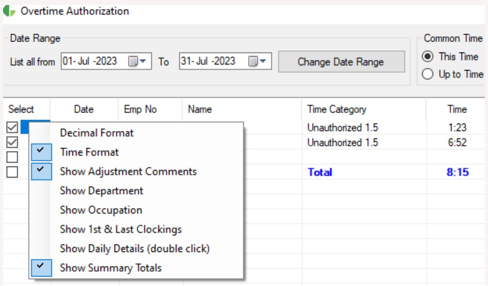
Unauthorized time can also be approved from the **Daily Details** window, however the whole amount for the day will be authorized or declined – to allocate only a portion of accumulated unauthorized time, the **Overtime Authorization** window must be utilized. From the **Daily Details** window authorized or declined time can be reset ("unauthorized") no matter where it was initially set. Note that if Workflow approval of Overtime is enabled, the authorize options in **Daily Details** will not be shown – it has to be done from the **OT Authorization** screen.

Double-clicking on a row in the **Overtime** window will open up **Daily Details**, although you will not be able to modify anything while the **Overtime Authorization** window is open.

By clicking the '**Show Authorized**' button in the lower left corner, one can view all processed OT as shown below. To reverse any processing that has been done, select the employees and click the '**Un-Authorize**' button. Right-clicking in the working area will present a context menu with additional column display options.

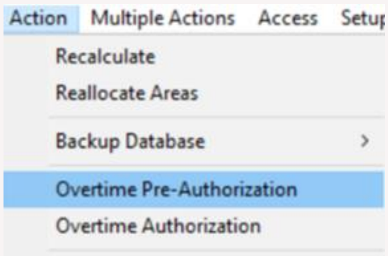


By right clicking a menu option can be enabled to show Department and Occupation columns as well as Totals of times at the bottom of the listing.



Pre-Authorization

This facility allows for overtime to be authorized ahead of time. The feature must be enabled from '**Setup**', '**System Configuration**' (please see Configuration manual for more) and **User Groups** should be adjusted accordingly (to restrict pre-authorizing before current date, or too far ahead).

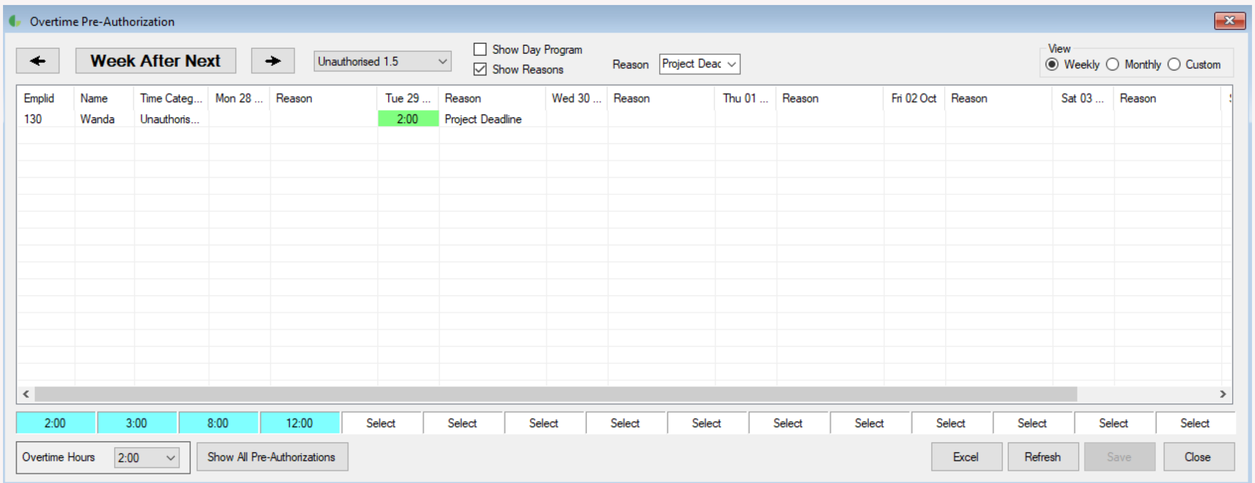


Once enabled, the Pre-authorization window is accessed from the '**Action**' menu.

The window is similar to the **Day Schedule**, presenting all employees selected in the list. To apply pre-authorized overtime, select the amount of OT to be applied from the bottom drop-down list (shortcuts can be created in the same manner as in the **Day Schedule** – see next section of this manual), and then click on the day the employee should be allowed to earn OT. When working with a selected authorization, right-clicking on a person will allow copying of their schedule.

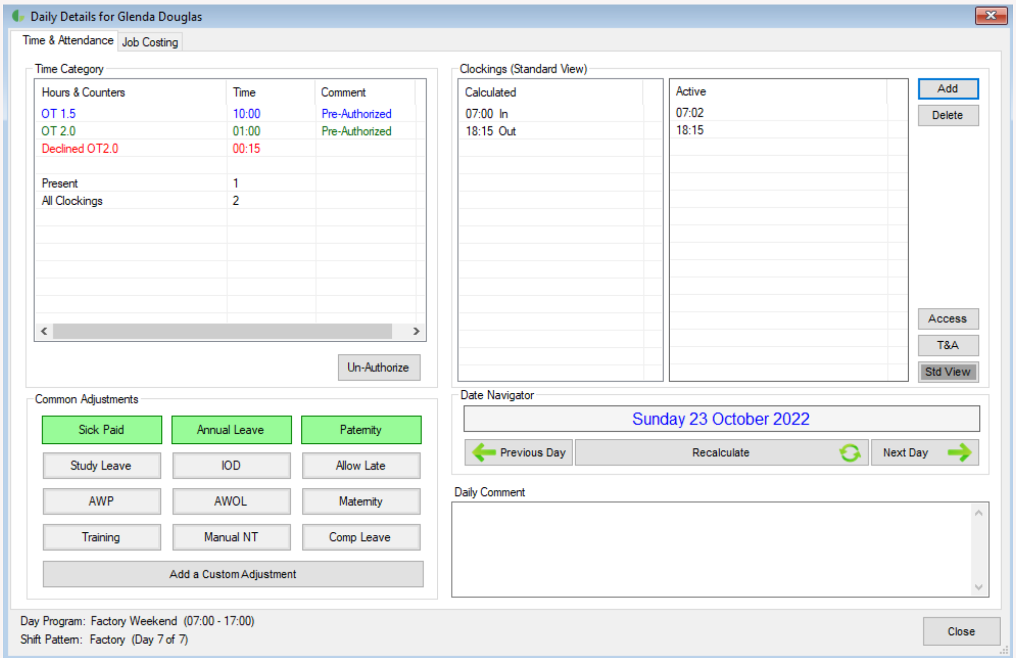
In the below screenshot an employee has been pre-authorized for two hours of OT on Monday and Tuesday (already saved and so shaded green), three hours on Thursday and Friday (not yet saved and so shaded cyan). The employee will still need to clock for Thursday and Friday hours before earning them. Also note that this is not pre-approved OT, it's pre-authorized OT – the day program the employee is on must be one that issues unauthorized OT.

Different authorization categories can be selected from the drop-down menu showing '**Unauthorized 1.5**' below. The '**Show All Pre-Authorizations**' toggle button will show all categories. If a reason needs to be applied to each pre-authorization, the reason should be selected or added prior to the pre-authorizing actions. To view applied reasons, place a check in '**Show Reasons**'. Reasons here work similarly to the **Overtime Authorization** screen.



Above the employee has been pre-authorized for two hours on Tue 29.

In the screenshot to the right, we see the **Daily Details** view of the employee having earned pre-authorized overtime. Any fully pre-authorized amounts will be in blue, partially approved will be in green, declined time in red.



If this earned Pre-authorized time is Unauthorized (cancelled), it reverts to unauthorized OT and disappears from the **Overtime Pre-Authorization** screen.

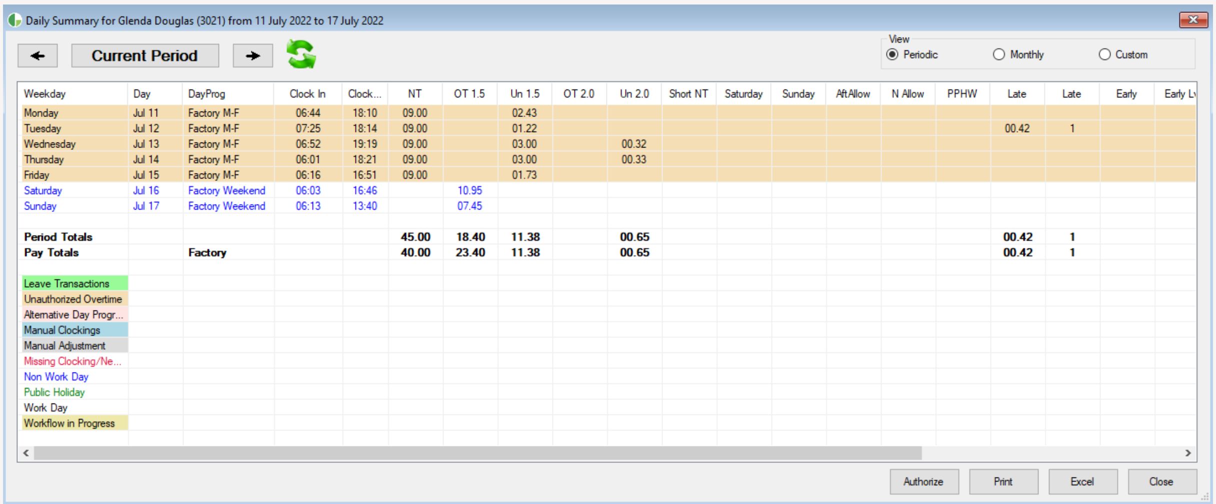
Note the employee is only pre-authorized for actual time worked. If no comment was applied during the pre-authorization process, the default comment is “Pre-Authorized”.

Daily Summary

Click on ‘**View**’ then ‘**Daily Summary**’ from the menu bar, or click the icon on the toolbar. This displays a summary of hours and totals periodically, monthly or for any custom date range. You can print the current info displayed to the default printer, or export it to Excel by clicking on the buttons along the bottom right-hand corner.

Periodic View

The '**Periodic View**' selected in the top right-hand corner, will display the summary using the current **Pay Group** date range with Periodic and Pay totals. In the example below this particular employee is paid on a weekly basis.



Periodic Totals are calculated by simply summing up the daily totals (time categories and counters earned). **Pay Totals** are calculated by applying the **Pay Group** rules to the Periodic Totals.

To navigate back a period, click the back arrow (or press F4 on the keyboard).

To navigate forward a period, click the forward arrow (or press F5 on the keyboard).

To navigate to a specific date, click the button between the two arrows displaying the current period, then select the date.

The green arrows button will recalculate for the dates that are currently displayed, for the selected employee.

Monthly View

The Monthly view will display from the first to the end of the month, for any month.

The concept is identical to the Periodic view, except for the fixed date range and the exclusion of the Pay Totals.

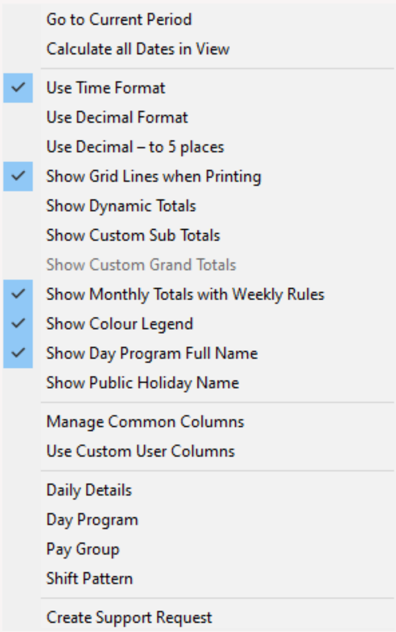
Custom View

Custom dates may be selected if need be. Select '**Custom**' and then select the dates necessary. When a Custom view is selected, as with Monthly, only the Periodic totals will be displayed.

Right-click Menu Actions

By right-clicking anywhere within the **Daily Summary** window you can bring up a context menu. The options are as follows:

Go to Today – This will show the summary for the current date.



Calculate all Dates in View – Will calculate all the dates without stopping at the current date automatically.

Use Time Format – Will show time in time format (e.g. 5:30 for five and half hours).

Use Decimal Format – Will show time in decimal format (e.g. 5.50 for five and half hours).

Use Decimal – to 5 places – Will show time in decimal format with five decimal places for increased accuracy (e.g. 5.50000 for five and half hours).

Show/Hide Gridlines when printing – If printed directly to the printer, will or will not print the grid lines.

Show Dynamic Totals – Will show the totals calculated dynamically.

Show Custom Sub Totals – Display dynamically calculated sub totals when using a custom date range.

Show Custom Grand Totals – Display dynamically calculated grand totals when using a custom date range.

Show Monthly Totals with Weekly Rules – Will display weekly rules applied to a monthly period.

Show Colour Legend – A complete colour key can be displayed underneath Pay Totals. See next page for more.

Show Day Program Full Name – Will show the Day Program's full description instead of short description.

Show Public Holiday Name –Will show the name of public holidays in the Weekday column.

Manage Common Columns –Will open the configuration window for adding, removing and sorting columns.

Use Custom User Columns – If the particular user's columns have been set via '**Configuration**', '**Custom**', this option will apply those settings.

Daily Details, Day Program, Pay Group, Shift – Will open the respective configuration window.

Create Support Request – Explained in the **Create Support Request** section.

Daily Summary Additional Functions

You can double-click on any date (row) to open it in the **Daily Details** window.

To change how the views are displayed, click on '**Configuration**' then '**Custom**' from the menu bar. You will be able to include or exclude clockings, day program names, or any time category and counters created in the software. The same can be done via '**User Groups**', '**Daily Summary**' tab.

To **authorize** overtime for the specific employee for the show dates, simply click '**Authorize**' and it will open the authorization window with the employee's unauthorized overtime. You can also print directly to the default printer and export the summary to Excel from this screen.

Flexi Time Totals

These totals are displayed at the bottom of the summary view if the employee is on a flexitime paygroup and **Periodic** view has been selected.

In the image below, the totals for the period are listed.

Flexitime					
Brought Fwd					-20:00
Worked Hours					142:48
Closing Bal					122:48
Lost Time					0:00
Carried Fwd					-40:00

Brought Fwd - The amount of time that has been transferred from the previous period's '**Carried forward**' amount (initial balance of flexitime).

Worked Hours - The actual amount of time worked in the period before applying any flexitime rules.

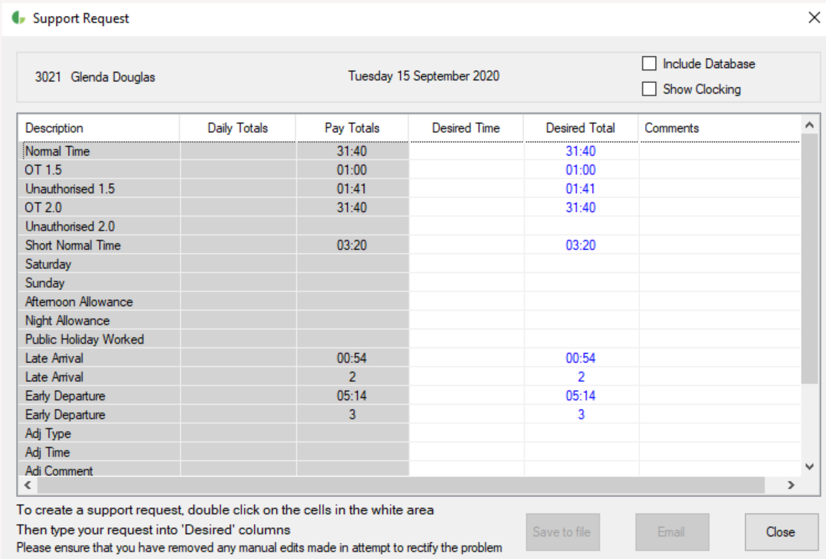
Closing Balance - The amount of time calculated after adding the 'Worked Hours' to the balance brought forward amount.

Lost Time - The amount of time worked which exceeds the allowed limit, for carrying over to the next period.

Carried Fwd - The amount of time which will be transferred to the next period, calculated from the difference between the closing balance and the 'Required Time'.

Support Request

To send a **Support Request** to your supplier, you can right click on the specific day for the specific person in question in the **Daily Summary** view and select '**Support request**'. The support request contains all of the daily and pay totals earned with a '**Desired**' column for each for you to change and then email to your support team. You can enter your desired time, which differs from the results of existing shift or pay group calculation.



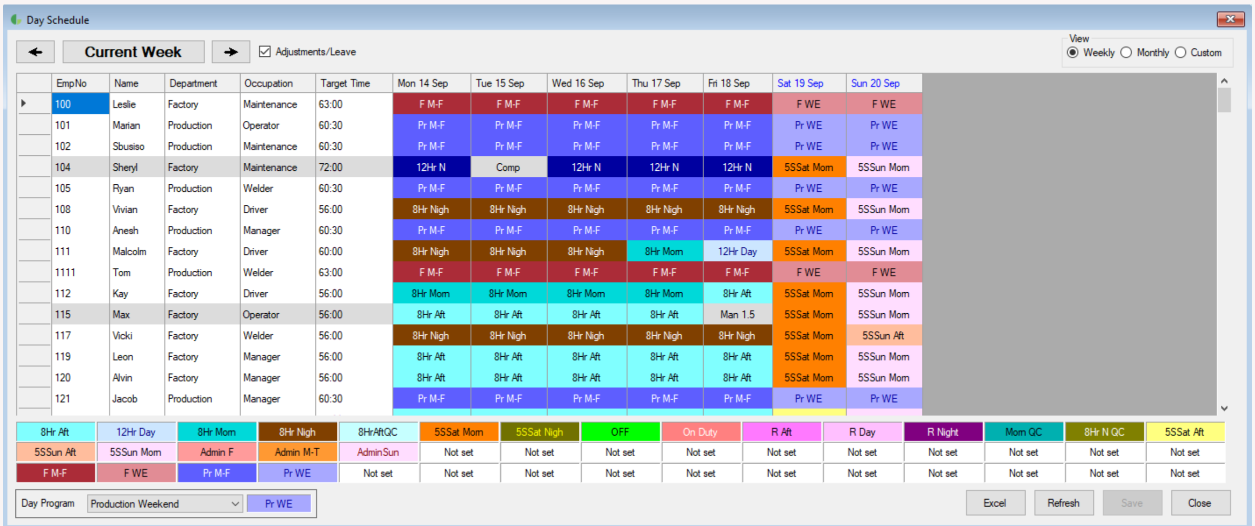
'**Include Database**' option on the top right-hand side will back up, then zip and attach the database to the email. If further changes need to be requested you need not send the database again, just the support request. If you select the '**Show Clocking**' option, the clockings will be included in the support request and can also be commented on in the support request.

Colour Legend

Various conditions occurring on days are noted via coloured or highlighted text, per below: This can be added to the Daily Summary by right-clicking and selecting '**Show Colour Legend**'.

Leave Transactions
Unauthorized Overtime
Alternative Day Program
Manual Clockings
Manual Adjustment
Missing Clocking/Negative
Weekend
Public Holiday

Day Schedule



The **Day Schedule** is used to assign shifts to any employee or group of employees for specific dates. When automatic shift allocation (bouncing) or a fixed Shift Pattern cannot cater for the unpredictable or ad hoc sequence of shifts an employee needs to work, it is best to use the **Day Schedule**.

Click on ‘**View**’ then ‘**Day Schedule**’ from the menu bar, this window will list all of the currently assigned day programs for all of the employees in the list for the given date range. The colours shown for each Day Program (shift) can be configured from ‘**Setup**’, ‘**System Preferences**’ window, ‘**Day Schedule**’ tab.

The Department, Number, Name and/or Surname columns are shown on the left, the rest of the window is filled up with the Day Program assigned for the selected date range. The date ranges shown can either be ‘**Weekly**’, ‘**Monthly**’ or ‘**Custom**’ (any date range).

To set the Day Program that an employee must work or has already worked, select the Day Program from the list of all available Day Programs at the bottom of the screen, and then click the date on the main window for the day the employee must work this newly assigned Day Program. This process allocates an ‘Alternate Day Program’ for each change and the system will use the newly-assigned Day Program’s rules etc. for that day.

To make assigning day programs quicker and easier you can assign your own custom ‘favourite’ buttons (saved differently for each user) to the Day Programs that you apply most often. To set your most commonly-used buttons, select a day program you use regularly from the drop-down list at the bottom, then either drag it onto a custom button, or right-click on the button and select ‘**Assign the ‘Day Program’ to this button**’. Now you can use your custom button. To do this, click your custom button from the list of buttons at the bottom which will select the assigned day program to use for your scheduling. To add more buttons, right-click on the window and select the number of rows to display. Each row has 15 buttons, allowing 45 buttons if all three rows are selected. Each button also has a keyboard ‘Hot Key’ assigned (1-45) respectively for even quicker selection of day programs.

To copy a selected employee’s schedule and apply it to another employee or group of employees, highlight the day by right-clicking on the Department, Number, Name and/or Surname and then selecting ‘**Copy schedule**’. The employee’s highlight colour will now change from blue to green. Now select one or more employees by either holding down the control <Ctrl> key (for selected individual employees) and/or the shift key (to select a range of employees) on the keyboard, right-click on their names and select ‘**Paste schedule**’. This will copy all of the single employees’ day schedules to the other selected employee/s for all of the dates shown at the time ‘**Weekly**’, ‘**Monthly**’ or ‘**Custom**’. Now click ‘**Save**’.

If another system is used to create the day schedule, you can import it by clicking on ‘**Import**’ on the menu bar then ‘**Day Schedule**’. The file will need to be in the correct format, per template found in the **C:\Program Files (x86)\Jarrison Systems\Jarrison Time** folder.

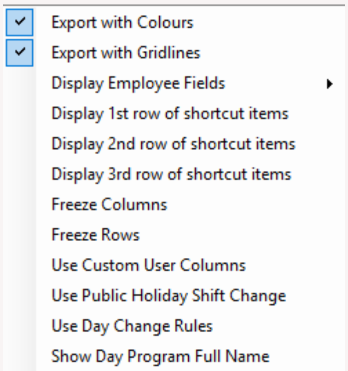
You can also export the day schedules to Excel for printing to a notice board if desired, via the button at the bottom right of the screen.

Ticking the **Adjustments/Leave** checkbox in the upper left of the window will display any adjustments which have been applied or imported in grey, or if the Leave module is enabled any applied leave will be shown in grey.

Right-click Menu Actions

By right-clicking in the work space, a menu with additional options can be produced, shown to the right.

You can determine whether to include colours and gridlines when exporting the schedule.



If Employee Custom Fields need to be displayed as columns, they can be added from ‘**Display Employee Fields**’.

If additional rows of shortcuts are required, they can be toggled on from here.

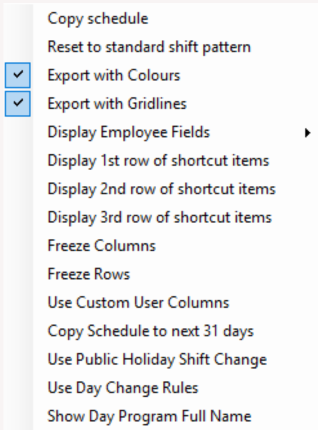
Selecting ‘**Freeze Columns**’ will lock the selected column and all columns to the left of it, in order to keep information on the screen while scrolling to the right. ‘**Freeze Rows**’ works similarly but on a vertical basis.

Use Custom User Columns - If the particular user's columns have been set via '**User**', '**User Preferences**' this option will apply those settings. (Note this setting requires '**User Custom**' enabled in **User Groups**)

Use **Public Holiday Shift Change** - Will allow the Public Holiday set on any applied day program s to take effect in the case of a scheduled day being a public holiday. (Note this setting can only be applied by the Administrator account). Note this option is only available to the Administrator account.

Use **Day Change Rules** - Will allow Day Change options set on any applied day programs to take effect as they normally would. Note this option is only available to the Administrator account.

Show Day Program Full Name - Will show Day Program full descriptions instead of short descriptions.



Right-clicking on the employee name or number will bring the same menu, but with a few additional options to Copy the employee's schedule, and once copied to then Paste it on other employees, or to reset any changes and revert the selected employee to their usual shift pattern.

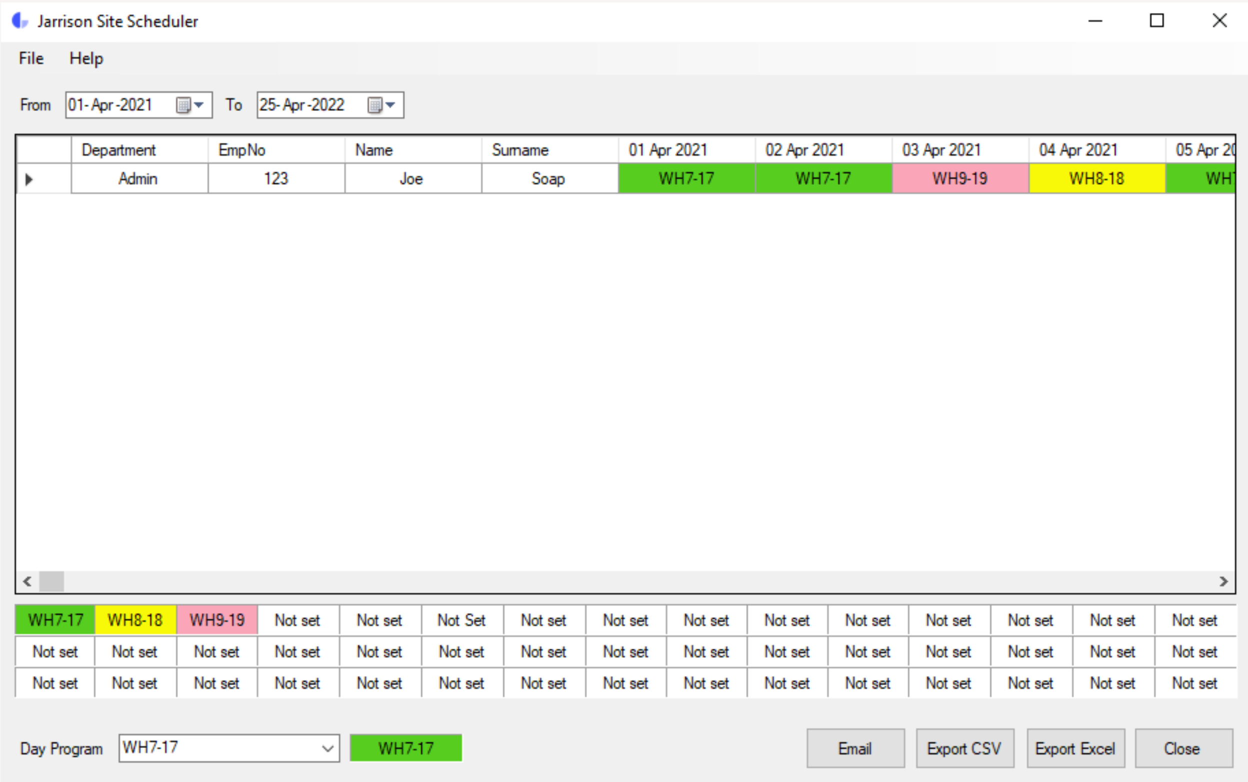
There will also be an option under **Use Custom User Columns** to **Copy Schedule to next**…

This option will copy the selected schedule for the time period being viewed, in other words if viewing **Weekly** the schedule will copy to the next seven days; if viewing **Monthly** the schedule will copy for the next month. The option will appear once a change to a person's schedule has been made and saved.

Site Scheduler

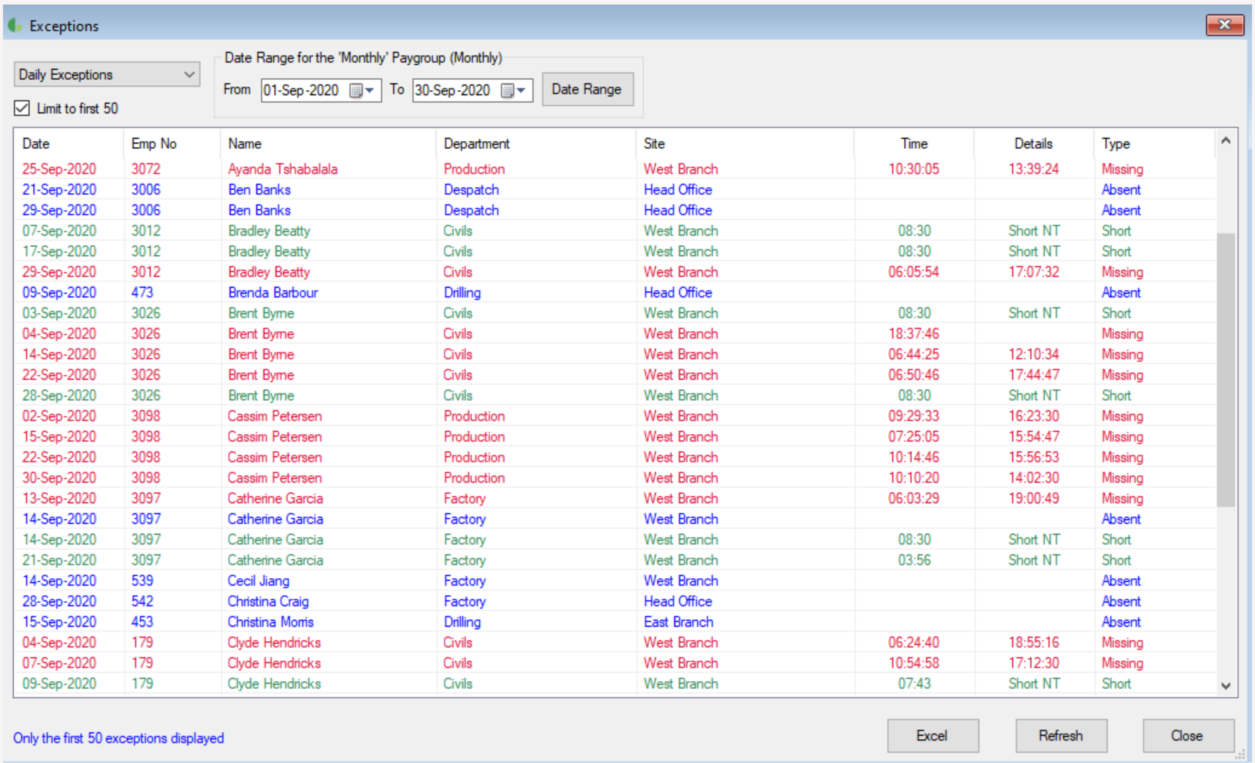
Jarrison Systems also offers a standalone mini-app for the purposes of scheduling shifts. The program is just the **Day Schedule** part of Jarrison Time, but does not require a user license – it can be installed anywhere and used immediately e.g. by a supervisor at a remote site where Jarrison Time is not installed. The program creates an export file which can then be imported into Jarrison Time via '**Import**' on the menu bar then '**Day Schedule (Alternate Day Programs)**.

The software can be downloaded from the Jarrison website. It does not require licensing.



(http://www.jarrison.net/jtinstalls/Optional/JT_SiteScheduler_Setup.zip)

Exceptions



Using this window will display all employee actions which require manual intervention (no need to print any reports first). It applies to all employees in the list. Click on ‘**View**’ then ‘**Exceptions**’ from the menu bar and select the date range required. It defaults to the current period excluding the current day. To switch between the existing pay group date ranges set, click on ‘**Change Date Range**’. Double-click on any entry to go to the **Daily Details** window, for that employee on the exception date to resolve the exception. For a list of individual exceptions you can select them from the list on top. You can also sort the results by clicking on the appropriate column header. Exceptions can be customized from ‘**Setup**’, ‘**System Preferences**’ (see Configuration manual for more info).

Daily Exceptions

The Daily Exceptions are displayed when opening the **Exceptions** window. JT will search for all exceptions which have been set on the **Preferences** window, explained in the Configuration Manual. Each different type of exception is listed in a different colour to assist with identifying them: **Missing Clockings**, **Absence**, **Short time**, **Unpaired Clockings**, **Multiple Clockings**, **‘Out’ as first clocking, Route Exceptions**, **Missing Job Clockings**, **Non Scheduled Work**, and **JT Clock Out of area.** To view all exceptions only of a particular type, you can select it from the list found at the top of the **Exceptions** window.

Missing T&A Clockings

A missing clocking will be listed if the employee has either not clocked In or Out for T&A during his/her workday. As with all exceptions you can double-click on the entry and make the necessary adjustment in the **Daily Details** window.

Absence

An employee who has no clockings on a day specified as a work day will be listed as absent for the day. Double-click on the entry and make the necessary adjustment in the Daily Details window. If an employee is absent for a number of consecutive days, for example annual leave, you can use the **Multiple Adjustment** feature explained in the **Multiple Actions** section of this manual.

Short Time

This will show all employees who have more than the specified amount of short time. There is an option to ‘**Only show short time for days when the employee is not absent**’ as absence generally results in short time too. This can be activated when the ‘**Short Time**’ option is selected. This becomes useful as an employee who leaves site half way through the day (with permission and without the supervisor notifying payroll immediately) will not have a missing clocking or be absent but will still appear on the exceptions list as having ‘Short Time’. Now the short time can be sorted out before the employee is short paid.

‘Out’ as first clocking

This option should/can only be used if the ‘Original Direction’ of the clockings is being recorded (using In and Out readers). When an ‘Out’ clocking exists as the first clocking of the day there is normally something wrong. Either the employee didn’t clock ‘In’ first, or the transactions from the ‘In’ reader have not yet been collected, or the shift setup has incorrectly allocated the clockings to the day.

Whatever the case, the **Exceptions** list will find them, allowing you or your supplier to take the necessary action.

Multiple Clockings

This option is used to list all employees that clocked more than once within the selected time frame. This is useful for identifying employees who do not pursue the correct usage of the access control system. For example, someone clocking 'In' twice through a turnstile might be granting access to an unauthorized person. Such transactions could be the cause of Missing Clockings. If '**Only if from same direction**' is selected, the **Exceptions** window will only list transactions which happened more than once from the same direction within the specified time frame. This can be useful for employees that may go 'In' then 'Out' of a turnstile which is acceptable.

Unpaired Clockings

This will list all of the days where the clockings are not paired. A paired set of clockings is an 'In' direction, followed by an 'Out' direction. As soon as they mismatch i.e. 'In' then 'In' or 'Out' then 'Out' etc. anytime during the day, JT will not calculate any totals. The option will force the operator to investigate the cause of mismatches and take necessary action. As soon as any manual edit has been made on the day, JT will begin the calculation of times again.

Route Exceptions (formerly Patrol Route breach)

This option will list all employees who either did not clock in the time set between clockings, or the correct sequence of devices for the route.

Missing Job Clockings

When Job Costing is in use this option lists employees who have incomplete job clockings.

JT Clock Out of Area

This option will list all employees who are clocking via JT Clock, but clocked somewhere out of their assigned **Area**.

Non Scheduled Work

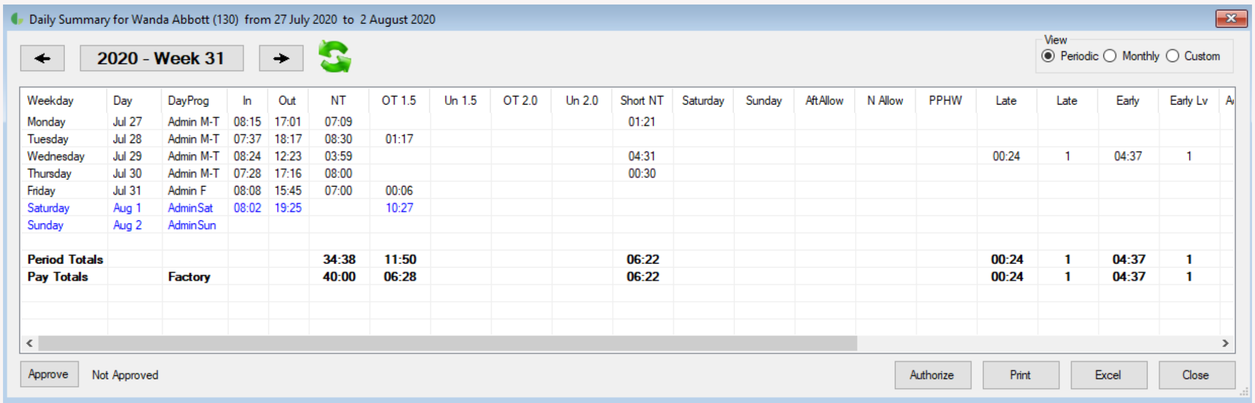
This option will list all employees who have clocked on day that was not meant to be a working day according to what has been assigned.

Approvals

The approval process at the **Daily Summary** approves periods per employee, then if activated (from '**Setup**', '**System Configuration**') one can approve a group of employees' totals in the **Pay Totals** window (explained in the **Pay Totals** section) and even further by approving the department totals (explained in the **Departmental Totals** section). Approval is used to ensure that the operator does indeed view and process the timesheet correctly.

Approved and unapproved periods can be included in the same mass Recalculation although approved periods will not be recalculated.

Daily Summary



Weekday	Day	DayProg	In	Out	NT	OT 1.5	Un 1.5	OT 2.0	Un 2.0	Short NT	Saturday	Sunday	AftAllow	N Allow	PPHW	Late	Late	Early	Early Lv
Monday	Jul 27	Admin M-T	08:15	17:01	07:09					01:21									
Tuesday	Jul 28	Admin M-T	07:37	18:17	08:30	01:17													
Wednesday	Jul 29	Admin M-T	08:24	12:23	03:59					04:31						00:24	1	04:37	1
Thursday	Jul 30	Admin M-T	07:28	17:16	08:00					00:30									
Friday	Jul 31	Admin F	08:08	15:45	07:00	00:06													
Saturday	Aug 1	AdminSat	08:02	19:25		10:27													
Sunday	Aug 2	AdminSun																	
Period Totals					**34:38**	**11:50**				**06:22**						**00:24**	**1**	**04:37**	**1**
Pay Totals		**Factory**			**40:00**	**06:28**				**06:22**						**00:24**	**1**	**04:37**	**1**

To approve a complete period you can click on the '**Approve**' button, however certain conditions must be met first.

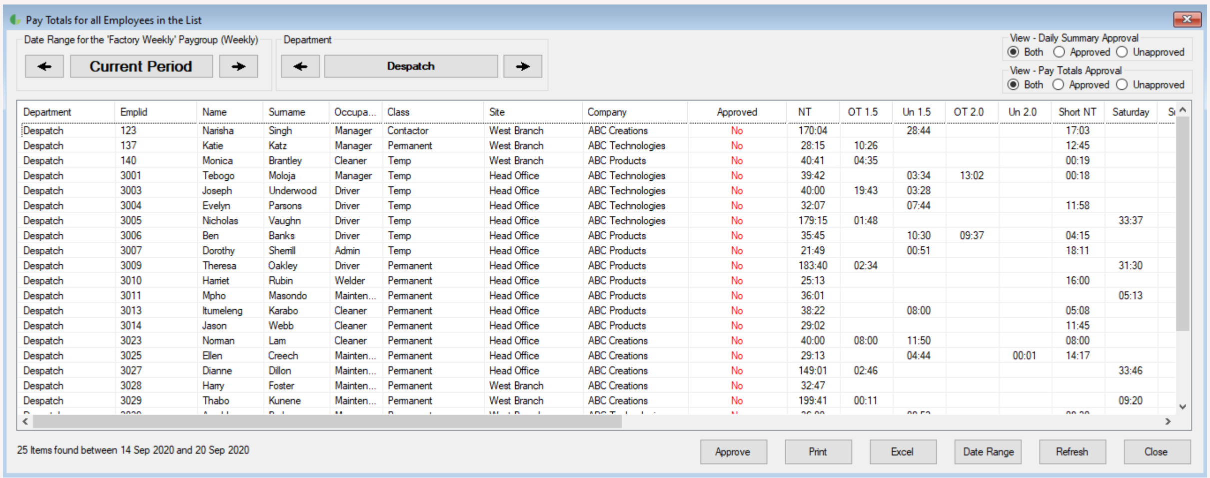
- Timesheet approval must be activated by the administrator. This only needs to be done once.
- All overtime needs to be processed (Authorized or Declined).
- There may not be any missing clockings.
- If configured, absence needs to be processed (Annual Leave, Sick Pd , AWOL etc.).
- The previous period(s) must be approved.
- Approval cannot be done in the current or future periods.

The above must be in order before the '**Approve**' button will become available.

Once the timesheet has been approved, no manual edits can be made to the period.

At the end of the period the '**Approve**' button must be clicked, thus 'signing off' the timesheet.

Pay Totals



Department	Emplid	Name	Surname	Occupa...	Class	Site	Company	Approved	NT	OT 1.5	Un 1.5	OT 2.0	Un 2.0	Short NT	Saturday
Despatch	123	Narisha	Singh	Manager	Contactor	West Branch	ABC Creations	No	170:04		28:44			17:03	
Despatch	137	Katie	Katz	Manager	Permanent	West Branch	ABC Technologies	No	28:15	10:26				12:45	
Despatch	140	Monica	Brantley	Cleaner	Temp	West Branch	ABC Products	No	40:41	04:35				00:19	
Despatch	3001	Tebogo	Moloja	Manager	Temp	Head Office	ABC Technologies	No	39:42		03:34	13:02		00:18	
Despatch	3003	Joseph	Underwood	Driver	Temp	Head Office	ABC Technologies	No	40:00	19:43	03:28				
Despatch	3004	Evelyn	Parsons	Driver	Temp	Head Office	ABC Technologies	No	32:07		07:44			11:58	
Despatch	3005	Nicholas	Vaughn	Driver	Temp	Head Office	ABC Technologies	No	179:15	01:48					33:37
Despatch	3006	Ben	Banks	Driver	Temp	Head Office	ABC Products	No	35:45		10:30	09:37		04:15	
Despatch	3007	Dorothy	Sherrill	Admin	Temp	Head Office	ABC Products	No	21:49		00:51			18:11	
Despatch	3009	Theresa	Oakley	Driver	Permanent	Head Office	ABC Products	No	183:40	02:34					31:30
Despatch	3010	Harriet	Rubin	Welder	Permanent	Head Office	ABC Products	No	25:13					16:00	
Despatch	3011	Mpho	Masondo	Mainten...	Permanent	Head Office	ABC Products	No	36:01						05:13
Despatch	3013	Itumeleng	Karabo	Cleaner	Permanent	Head Office	ABC Products	No	38:22		08:00			05:08	
Despatch	3014	Jason	Webb	Cleaner	Permanent	Head Office	ABC Products	No	29:02					11:45	
Despatch	3023	Norman	Lam	Cleaner	Permanent	Head Office	ABC Creations	No	40:00	08:00	11:50			08:00	
Despatch	3025	Ellen	Creech	Mainten...	Permanent	Head Office	ABC Creations	No	29:13		04:44		00:01	14:17	
Despatch	3027	Dianne	Dillon	Mainten...	Permanent	Head Office	ABC Creations	No	149:01	02:46					33:46
Despatch	3028	Harry	Foster	Mainten...	Permanent	West Branch	ABC Creations	No	32:47						
Despatch	3029	Thabo	Kunene	Mainten...	Permanent	West Branch	ABC Creations	No	199:41	00:11					09:20

Click on '**View**' then '**Pay Totals**' from the menu bar. This window displays a list of the totals achieved for each employee in the list for a period. Columns will display according to how they are set for the **Daily Summary**, though fields from **Employee Details** may be added by right-clicking anywhere in the window. You can double-click on any total to open the **Daily Summary** for that particular employee for the period. There is a date navigator which allows you to select the period. The two arrows will select the previous and next periods for the date range. The date range is based on the dates chosen in the pay groups. To change the date range you can click on the '**Date Range**' button which will select the next pay group's date range. The default display dates will be based on the **Pay Group** of the first employee in the Employee List.

To view or approve the totals for one particular department, you can select it from the '**Department**' list. The two arrows next to the list will scroll between all of the departments. This list will show all departments which all of the employees (in the employee list) belong to.

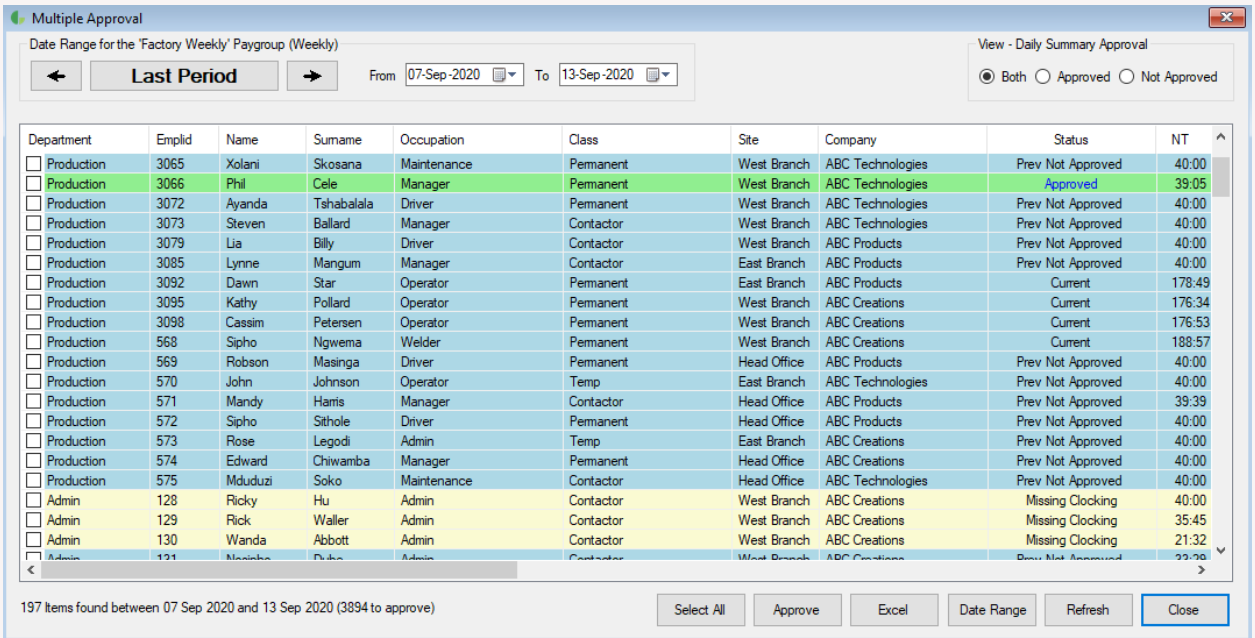
You can view employees in this list based on their current **Daily Summary** approval. Click on either '**Both**', '**Approved**' or '**Unapproved**' for '**Periodic Summary**' and '**Periodic Totals**'. You can click on the column header to sort the list on that column (ascending or descending).

The second level of the approval process is done here, in the **Pay Totals**. To approve all of the totals in the list click on the '**Approve**' button, however certain conditions must be met in order to approve.

- Firstly **Daily Summary** approval must be activated by the administrator. This only needs to be done once.
- Each **Daily Summary** needs to be approved for the same period

There are also options to print the current info displayed to the default printer, or to export it to Excel.

Multiple Approval

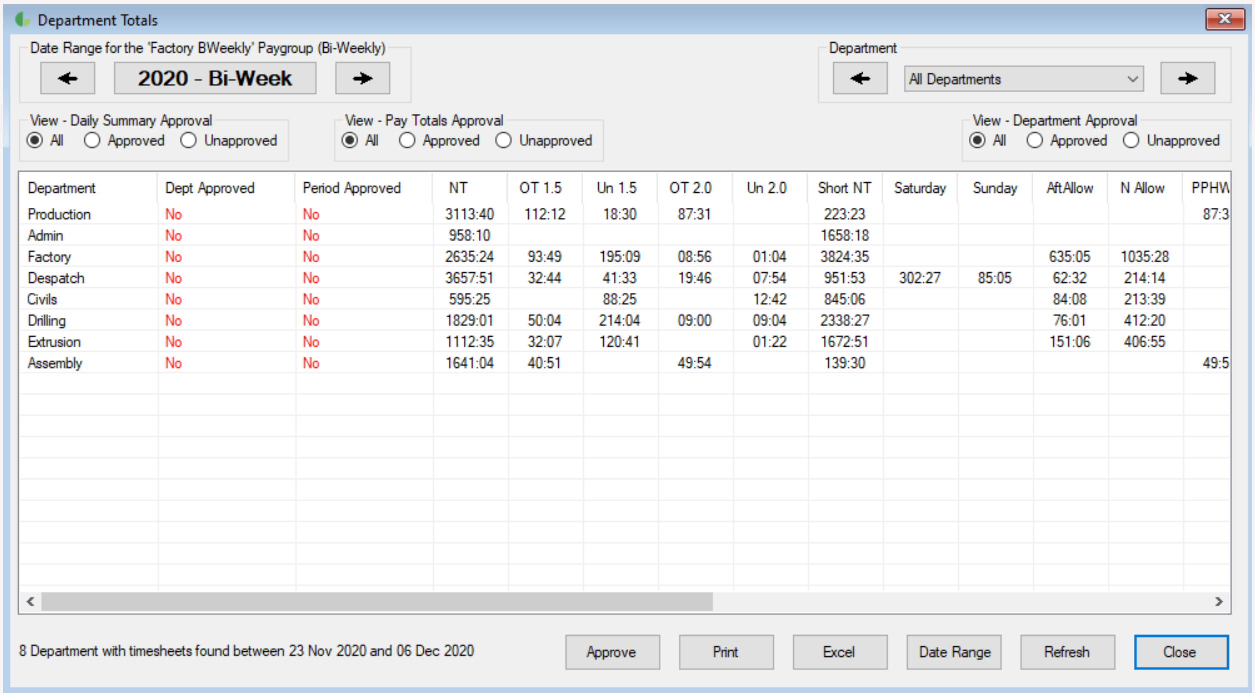


Click on '**View**' then '**Multiple Approval**' from the menu bar.

This window displays a list of all of the pay totals found within the date range, for each employee in the list. Columns will display according to how they are set for the **Daily Summary**, though fields from **Employee Details** may be added by right-clicking anywhere in the window. This window will allow you to select multiple periods to approve at once. A green background indicates pay periods that have already been approved, a yellow background indicates periods containing unprocessed (not yet authorized or declined) overtime. The blue background indicates periods that may be approved, including all previous periods which are also eligible for approval.

You can double-click on any total to open the **Daily Summary** for that particular employee for the period. There is a date navigator which allows you to select the period. The two arrows will select the previous and next periods for the date range. The date range is based on the dates chosen in the pay groups. To change the date range you can click on the '**Date Range**' button which will select the next pay group's date range.

Department Totals



Click on '**View**' then '**Department Totals**' from the menu bar. This displays a list of totals achieved for each department for all employees in the list for a period. Columns will display according to how they are set for the **Daily Summary**. You can double-click on any total to open the Periodic Totals for that particular department for the period. There is a date navigator which allows you to select the period. The two arrows will select the previous and next periods for the date range. The date range is based on the dates chosen in the pay groups. To change the date range you can click on the '**Date Range**' button which will select the next pay group's date range.

To view or approve the totals for one particular department, you can select it from the 'Department' list. The two arrows next to the list will scroll between all of the departments. This 'Department' list will show all departments which all of the employees (in the employee list) belong to.

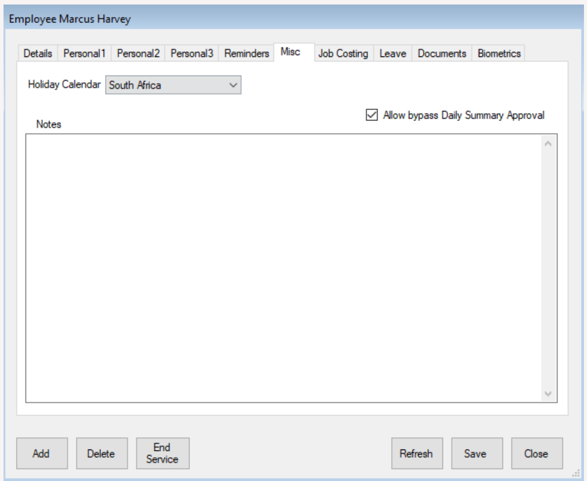
You can view totals in this list based on their current Daily Summary and Pay Totals approval. Click on either '**Both**', '**Approved**' or '**Unapproved**' for Daily Summary, Pay Totals and Departmental approval. You can click on the column header to sort the list on that column (ascending or descending).

The third level of the approval process is done here on the **Departmental Totals**, and to approve all of the totals in the list you can click on the '**Approve**' button, however certain conditions must be met in order to approve.

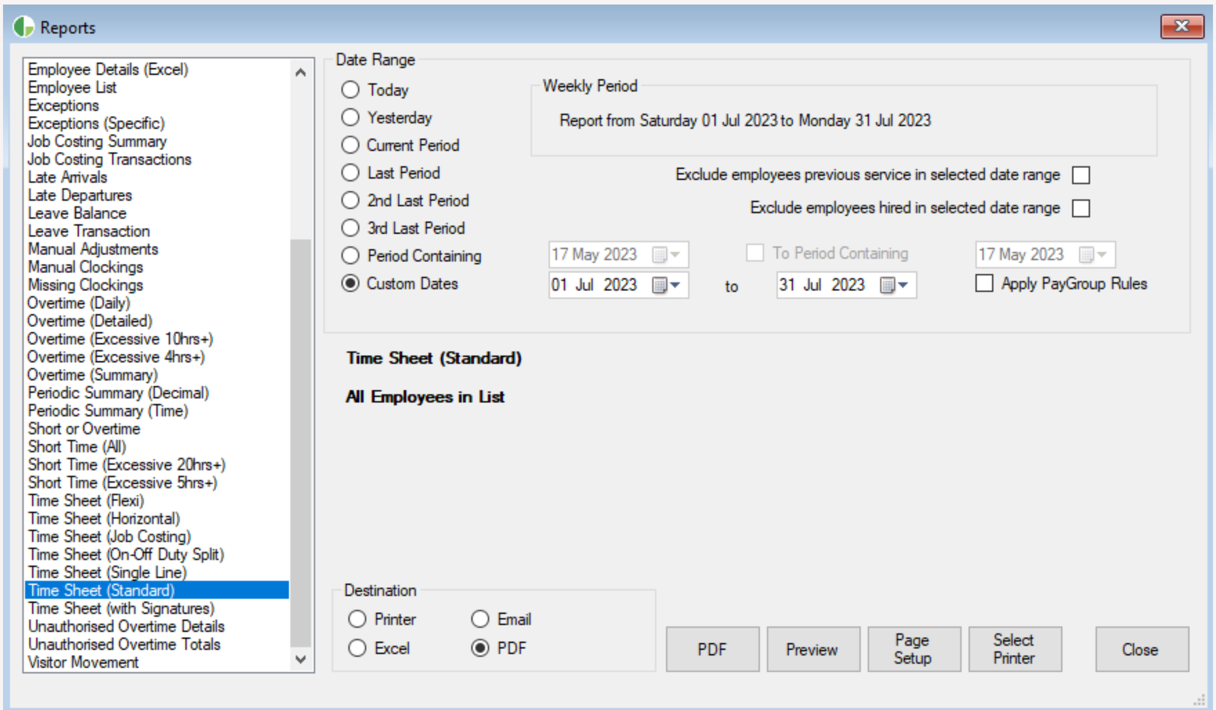
- Firstly **Daily Summary**, **Pay Totals** and **Departmental Totals** approvals must be activated by the administrator. This only needs to be done once.
- All Pay Totals need to be approved for the same period.

The **Department Totals** screen also has options to print the current info displayed to the default printer, or to export it to Excel.

Should certain employees not require approval, they can be excluded from the process. See the Configuration manual on how to enable **Approval Bypass**. Once enabled, a checkbox will become available on the **Employee Details Misc** tab, per screenshot on the right. Checking the box will result in the employee's **Daily Summary** not requiring approval at the end of each period.



Reports



To print a report, first select the person or load the filter as required, then select the report from the list on the left. Select the date range, then click '**Preview**' to view the report on screen before printing, otherwise click '**Print**' to print immediately.

You can print to PDF or Excel from here (the '**Print**' button label will change name accordingly). You can also attach the report to an email by selecting '**Email**'. If the report type is set as '**Day Total**', there will also be an option to print the report in .CSV file format.

If you do not wish to print to the default printer and others are available, then click '**Select Printer**' and choose the printer you wish to print to.

More on date ranges:

Current Period: This will print the period, which includes today's date (incomplete period).

Last Period: This prints the full period just before the current period.

Period Containing: Prints the full period, which includes the date selected from the calendar. If you select '**Period Containing**' it will print all the full periods between and including the dates selected.

Custom dates: This will print the exact 'from' and 'to' dates selected, but will not apply the pay group's periodic rules! (Example, first 40 Hrs NT then only allocate OT1.5). Instead JT will only print the sum of all time categories for the dates selected.

If '**Apply Paygroup Rules**' is selected, JT will apply the Pay Group rules to any full periods contained within the custom date selection, all other daily totals, before and after the full periods will be summed up without applying the rules, resulting in one total for the selected period.

Employees whose service has been ended will be included in reporting periods where they were still active. To exclude previous service history in the cases of rehires, select '**Exclude employees previous service in selected date range**'.

Employees hired in the reporting date range can be excluded by selecting '**Exclude employees hired in date range**'.

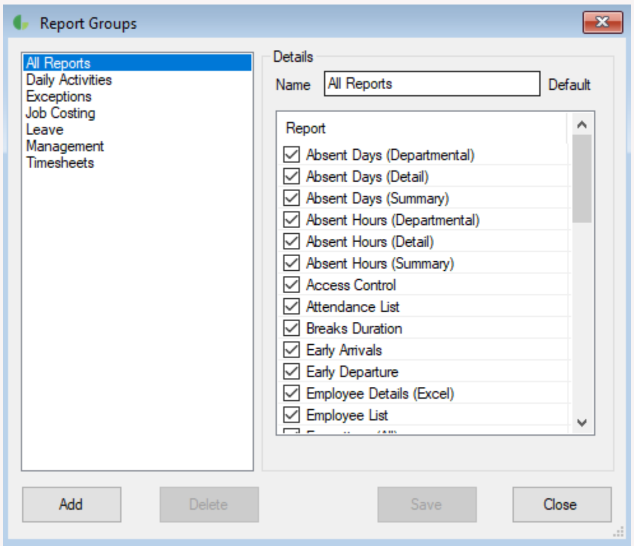
Note that any employees excluded from a report will be added to the log file at C:\JT-Data\Reports\Exceptions.txt

Report Groups

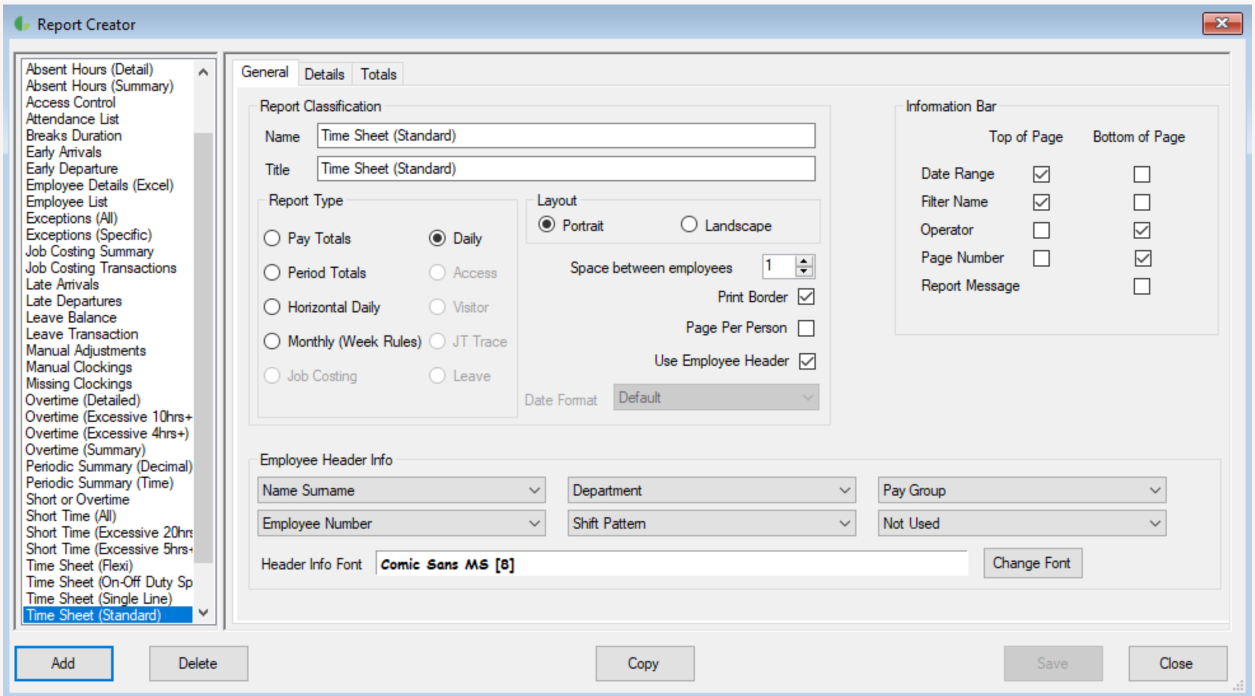
Report groups allow selected reports to be grouped together and assigned to users limiting specific users to only use specific reports. Click '**Add**' to add a new report group, and then select the reports which that group will be able to use.

When setting up the user account (see the **User Profiles** section of the Configuration manual) the appropriate adjustment group for each user can be assigned.

Report Groups are enabled from '**Setup**', '**System Configuration**', '**Import Clockings**' tab.



Report Creator

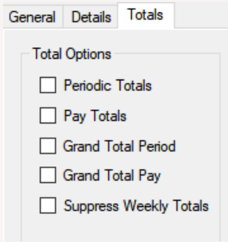


The **Report Creator** is used to create or edit reports as per requirements. Click on '**Setup**' then '**Report Creator**' from the menu bar, then click '**Add**' or select a report to edit, from the list on the left. You will be presented with three tabs. If you are unfamiliar with the Report Creator, it is advisable to click '**Copy**' which creates an exact duplicate of the selected report, and then alterations can be made without affecting the original. Once the new report is producing the desired results, one can delete the original. To test the results, run the report while the Report Creator is still open.

General tab

The ‘**Name**’ of the report, will appear in the list on the left, while the ‘**Title**’ will appear at the top of the report. There are several types of report:

A ‘**Pay Totals**’ report will only print the pay totals (applying the Pay Group rules), unless custom dates are selected, then JT will only print the periodic totals for the custom dates.



A ‘**Periodic Totals**’ report will only print the periodic totals and will not apply the Pay Group rules.

A ‘**Day Totals**’ report will allow a ‘**Where Condition**’ when ‘**Only If**’ is selected for an item, to allow printing of daily totals per a field selection. This report type also allows a CSV report format to be printed.

A ‘**Daily**’ report will print the daily totals and a choice of totals (‘Pay and Periodic’, ‘Pay only’, ‘Periodic Only’ or ‘No totals’).

A ‘**Monthly (Week Rules)**’ report would be used in conjunction with a similarly configured Pay Group, and display weekly totals for a monthly period. If this option is checked, on the **Totals** tab an additional option will appear, as pictured on the right. This option allows the weekly detail to be suppressed.

A ‘**Horizontal**’ report is similar to a Daily report except that it prints from left to right as opposed from top to bottom. It will only print to Excel and no daily dates will be printed as they are shown automatically in the column headers.

An ‘**Access**’ report will print the clocking and access times from the selected readers (access control and time and attendance).

A ‘**Visitors**’ report will print the clocking times and details from the visitors. Note: To print a ‘**Visitor’s List**’ report you need to eliminate clockings and devices etc. (transactional info) from the details. I.e. only include names, surname and ID number etc.

The **JT Trace** option will only become available if the Trace module is enabled, and will provide reporting related to this module.

The **Job Costing** option will only become available if the Job Costing module is enabled, and will provide reporting options related to this module.

The layout of the report can either be ‘**Landscape**’ (horizontal on the page) or ‘**Portrait**’ (vertical on the page). When a report is required to show many different details, it might be necessary to print landscape to fit them on the page (some Timesheet reports should be landscape).

'**Page Per Person**' will only print one person's details on a page if selected. However if the details exceed the space on one page, JT will split the report onto multiple pages, but not combine two people's details onto the same page. This option is usually selected when employees receive a printout of their timesheet. However to save paper, it is recommended to leave this unselected (JT will not split a person's details over two pages unless the details exceed the space on the page).

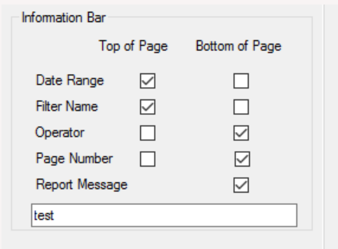
The '**Print Border**' option, if selected, will print a rectangular border around the entire page of the report.

The '**Use Employee Header**' option is only available with daily reports. If it is selected JT will allow for six possible options to be selected as the header information per employee. One can change the options selected from the list, as well as their position on the report. This option also enables **Signature Options** on the **Totals** tab.

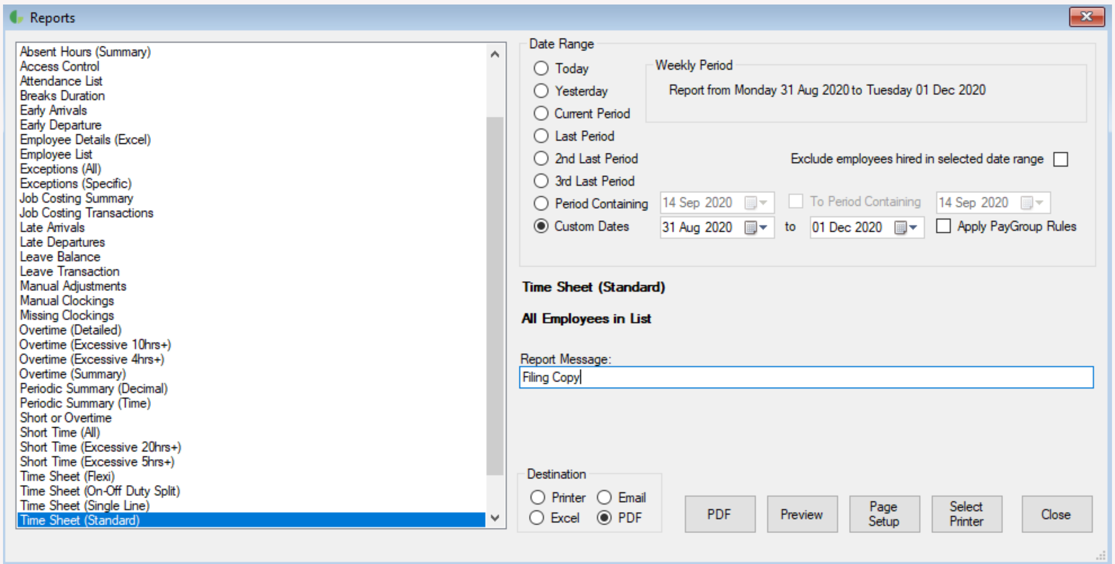
JT also shows an example of the font selected for the header information, in the '**Font**' example line. To change the font, click '**Change Font**' and select the desired font, size and style.

The '**Space between employees**' can be set to distance the vertical space between each employee's information if more than one person is being printed on a page.

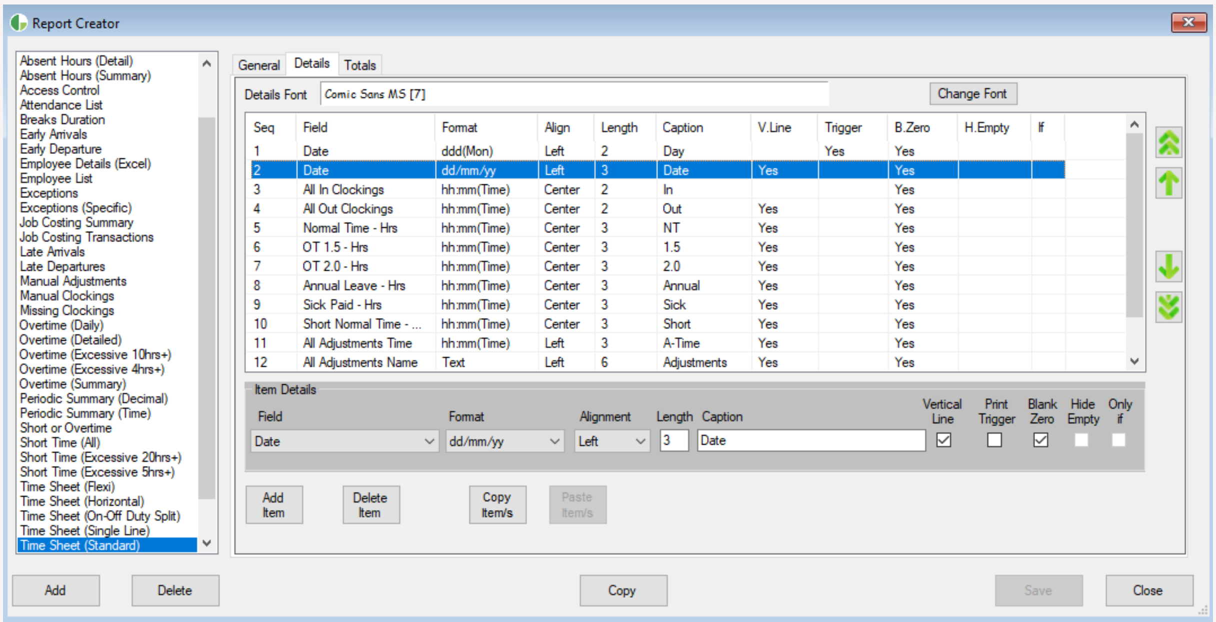
The **Information Bar** is printed at the top of the report just beneath the fixed information right at the top (Company Name, Report Title and the Date and Time that the report was run). The **Date Range** selected for the report, **Filter** used on employees, **Operator** name and **Page number** can be printed (or not), at the top or bottom of the page. Selecting the appropriate boxes in the Information bar can construct this information.



Selecting **Report Message** will enable a text field just underneath where a message may be entered. With this option enabled there will also be an input field available on the **Reports** window above the report format buttons. Anything entered in this field will override what was entered in the default field.



Details tab



The details of the report are listed from top to bottom in this **Details** screen and represent columns in the report from left to right. Each item (column) added to the report has its own settings associated with it, and are independent from the other items. To show or edit an item's settings, click on the item and the settings will show in the '**Item Details**' frame.

To add an item to the report, click the '**Add Item**' button and then complete the details:

In the Item Details area, the '**Field**' is the kind of information required from JT, and can be selected from the drop-down list. This list is broken down into General information (dates, clockings etc.), Time Categories, Counters and Employee attributes (names, departments, pay groups, etc.).

Each item must have a '**Format**', e.g. dates may have different formats, while names would have a text format. The **Decimal(2)** and **Decimal(4)** options are intended for use with Job Costing.

The '**Alignment**' selected will print the values accordingly (Left, Right or Centre) in the report column. The '**Length**' of the column is measured as horizontal size and not as characters. The '**Caption**' entered here will be printed on the top of each column and this should describe the kind of information in the column.

A '**Vertical Line**' will be printed on the right-hand side of the column, if selected.

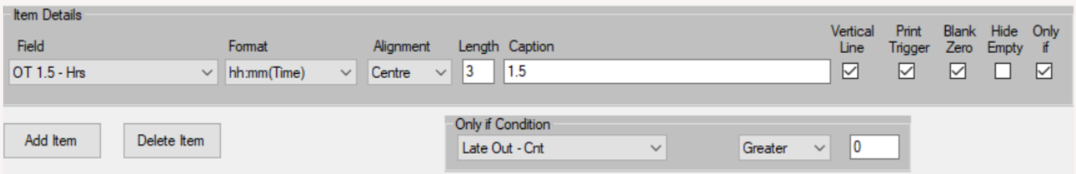
The '**Print Trigger**' item/s will prompt JT to print the information to the report. Each report needs at least one trigger. JT will print all of the columns, as listed in the details above, if one of the trigger items has an existent value (not empty or zero).

Example 1: For a Late Arrival report one would only mark the Late Arrival time category as a trigger. Then only in the event of late arrival will JT print all of the row details on the report, for all employees with late arrival time E.g. Name, Date, Employee Number and of course Late Arrival time.

Example 2: For a Time Sheet report one would mark the Date as a trigger, to make JT print each date in the date range on the report (each day always has a date, therefore will always print, regardless of any other values in other columns).

The '**Blank Zero**' option will leave a blank space on the report when there is no value or time, as opposed to printing "00:00" on the report.

The '**Only If**' option, if selected, will allow for further conditions to be set e.g. only if Late Out is greater than zero. This will only print OT 1.5 if the Late Out counter has some value. These conditions can only be applied to items which are print triggers, and only one per report. It is possible to trigger time category fields based on counters and counters based on time categories, whether or not they are being reported on.

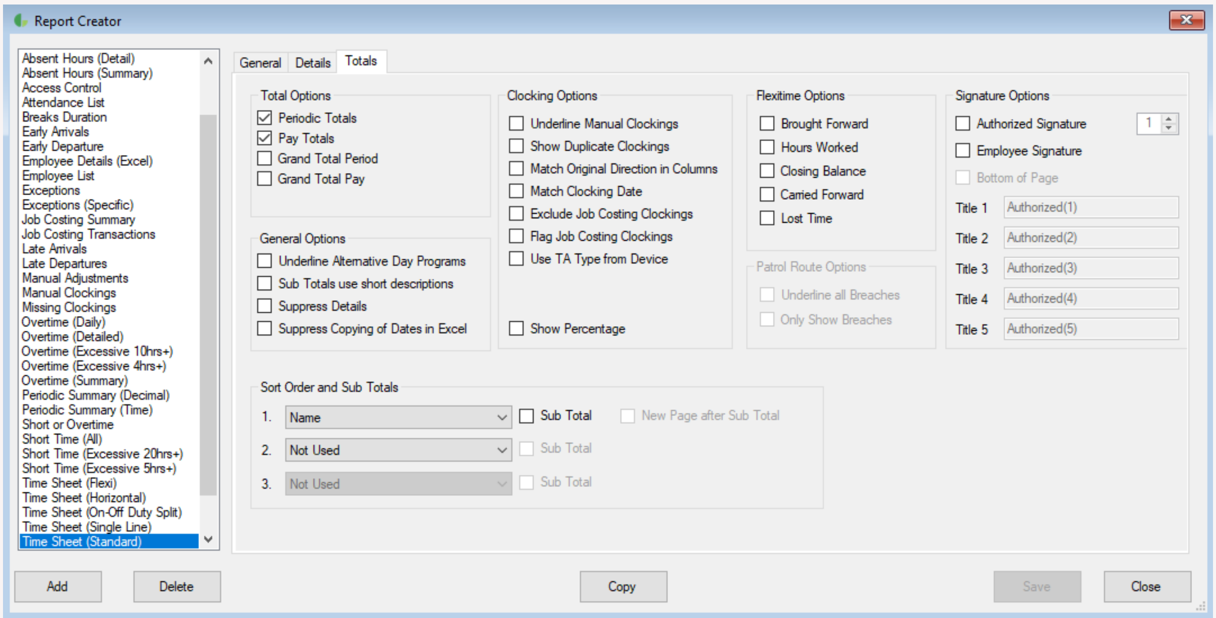


Hide Empty - Selecting this option will hide the column completely if there are no values e.g. if you only want to show the OT1.5 column when employees actually have OT1.5, use this option. Note that if the report has employee headers, columns will be hidden based on values per employee. If the report does not use employee headers, columns will be hidden according to values of all employees in the report.

Columns can be moved left or right on the report using the up and down arrows on the **Details** tab. Click on the item, and then click an arrow button on the right-hand side of the screen. The double arrows will move a selected item 10 places instead of one at a time.

The ‘**Copy Item/s**’ button can be used to copy selected rows to memory. Copied items can be added to reports by clicking ‘**Paste Item/s**’

Totals tab

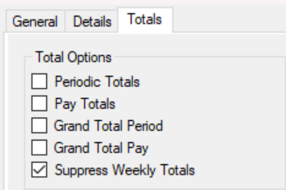


The ‘**Total Options**’ are used to configure which totals are to be printed on the reports. Depending on the report type (identified on the **General** tab), only certain totals will be available for selection.

If selected, ‘**Periodic Totals**’ and/or ‘**Pay Totals**’ will print at the bottom of each person’s daily totals.

‘**Grand Total Period**’ and/or ‘**Grand Total Pay**’ will print the sum of all totals, at the very end of the report for all employees in the list. It is not recommended to include grand totals for timesheet reports, as employees and/or supervisors who may receive a print of the timesheets will see the grand total on the last person’s report, this may create confusion.

If the report type is ‘**Monthly (Week Rules)**’ the **Totals** section will have an additional option that controls printing or suppressing of Weekly Totals.



JT will sort the employees on the report according to the ‘**Sort Sequence and Sub Totals**’ configuration, default order is according to employee list. There are three different sort levels and optional sub totals for each sort level. As in the example above, JT will print each department, with all employees assigned to that department, in alphabetical order. Then all employees within each department will be sorted alphabetically according to their name. At the end of each department printed, JT will print the total, and then begin the next department's information on a new page. This is useful when each different supervisor requires his or her own separate printouts. If '**Sub Total**' or '**New Page after**' is not selected then JT will simply ignore any sub totals, and not print the next department onto a new page.

General Options

'**Underline Alternate Day Programs**' will mark any alternate day programs that have been applied by underlining them.

'**Sub-totals show short descriptions'** will allow space to be saved by only showing short descriptions of sub-totals.

If selected the '**Sub Totals use short descriptions**' will use the short description assigned to the "sort sequence" item selected. (This would be Name in the image above). This option may be considered if the department names are long, and will not fit onto the report. The subtotal descriptions are printed on the left-hand side of the report under the first column. If the column is smaller than the department name then JT will print the department name straight through the barrier of the first column. To solve this, one can swap a short employee number column with a longer name column, or use a longer date format.

'**Suppress Details**' will not print any daily or periodic details per person, only the totals per sort sequence e.g. Department. Mainly used for management reports.

'**Suppress Copying of Dates in Excel**' - will prevent the date from being duplicated on every additional row required for entries of the same day

Clocking Options

JT will '**Underline Manual Clockings**' on the report if the option is selected, used to easily identify any manual clocking.

'**Show Duplicate Clockings**' will print duplicate clockings which have been combined into a single clocking from the shift rules.

'**Match Original Direction in Columns**' will force 'In' clockings to only show in the 'In' column, and 'Out' Clockings in the 'Out' column.

'**Match Clocking Date**' - will show clockings with the date they occurred on, not necessarily the day their shift started on e.g. on a night shift, to show the out clocking occurring in the following day

‘**Exclude Job Costing Clockings**’ - used with Job Costing, to exclude Job Costing Clockings from the report

‘**Flag Job Costing Clockings**’ - used with Job Costing, to indicate Job Costing Clockings on report with #

‘**Use TA Type from Devices**’ - this option would be used in conjunction with **Clocking Groups**, in order to calculate on/off duty times according to devices marked as ‘**Used for Time and Attendance**’ in **Devices**.

‘**Show Percentage**’ will calculate a percentage ratio of the number of employees in the report.

Flexitime Options would only be of use in the case that a pay group using Flexi is in place; the options allow for presenting various Flexi values.

The **Patrol Route Options** will only be enabled if patrol routes are activated and the report type is **Access Control**. ‘**Underline Patrol Breaches**’ will only underline any patrol route breaches in the selected date range. The ‘**Show Patrol Breaches Only**’ option will exclude all standard access control transactions except for any breaches.

Signature Options allow for the printing of lines for signatures of employee and authorized personnel. An ‘**Employee Signature**’ line can be added, and the ‘**Authorized Signature**’ option can be used to increase the number of authorized signature lines to a maximum of 5. Custom titles may be added for each line.

A timesheet example report.

Customer Name | Time Sheet | 14-Sep-2008 13:50

10-Apr-2008 to 16-Apr-2008 | Filter: None

John Malulebe Nolwazi | **Maintenance** | **Weekly**

734 | **Rotation Shift**

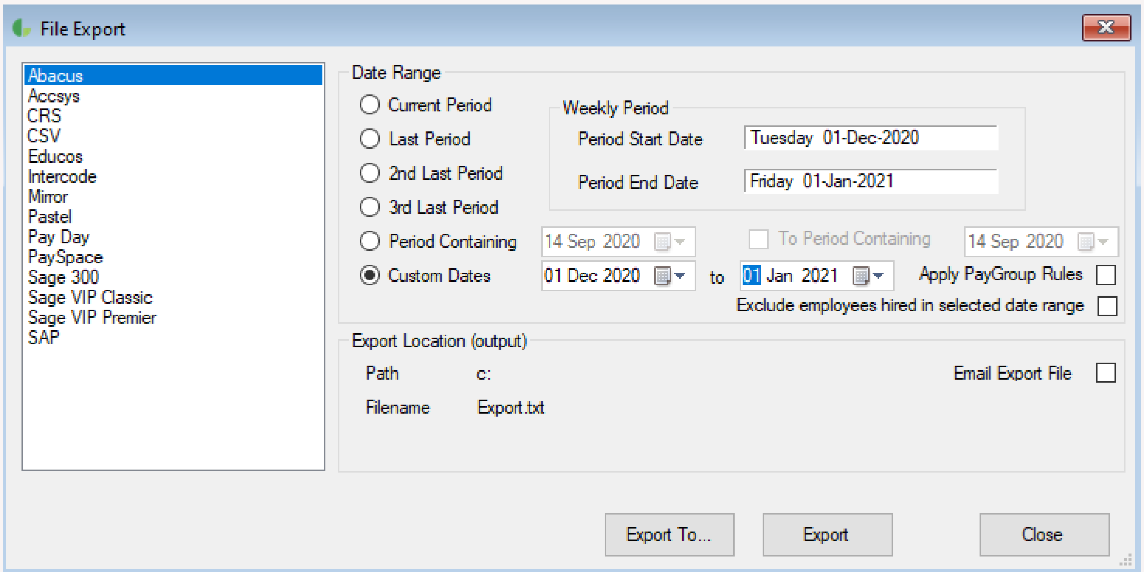
Day	Date	In	Out	?	X	NT	1.5	2.0	PPH	Sick	Short	A-Time	Adjustments	Comments
Thu	10/04/08	7:07	9:17			9:00								
		9:22	12:22											
		13:10	17:01											
Fri	11/04/08	7:06	9:43			8:30					0:30			
		10:02	12:12											
		13:10	14:53											
		15:00	17:03											
Sat	12/04/08	7:57	11:37			8:19								
		11:43	16:22											
Sun	13/04/08													
Mon	14/04/08	17:25	22:07			9:00	2:41							
		22:17	22:18											
		0:57	2:09											
		7:28												
Tue	15/04/08	17:32	22:03			9:00	2:23							
		22:18	1:04											
		2:00	7:06											
Wed	16/04/08	17:21	22:03			9:00	2:44							
		22:09	0:58											
		2:01	7:14											
Period Totals						52:49	7:48				0:30			
Pay Totals						45:00	15:37				0:30			

End of Report

Jarrison Systems

File Export

The file export will export the calculated totals to an ASCII file, for the Third-Party system to import. The export format is created in the **File Creator**, which is beyond the scope of this manual.



To export the totals, first select the person or load the filter as required, then select the export format from the list on the left. Select the date range, and then click '**Export**', this will export the file to the saved export location. The '**Export To…**' button will display a browse window in order to select a specific location to export the file to. If '**Email Export File**' is selected the output file will be attached to an email, ready to be sent. If you do not wish to include employees hired in the date range to be exported, tick the box for '**Exclude employees hired in selected date range**'.

More on date ranges (equivalent to reports):

Current Period: This will export the period, which includes today's date (incomplete period).

Last Period: This will export the full period just before the current period.

Period Containing: Exports the full period, which includes the date selected from the calendar. If you select '**To Period Containing**' it will export all the full periods between, and including the dates selected.

Custom dates: This will print using the exact 'from' and 'to' dates that you select from the calendar. However it will not use the pay group's periodic rules! (Example: First 40 hours NT then only pays OT1.5)

It simply produces the sums and counts for all time categories and counters, unless you select '**Apply Paygroup Rules**'. This will only apply the rules to all full periods contained within the custom date selection, and includes *those* totals for the sum of all time categories and counters.

Engine

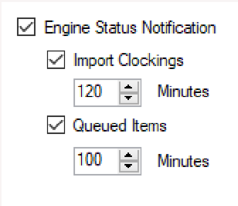
The Engine is a service application which runs independently to Jarrison Time, and runs in the background on **one** designated computer. It is used to manage and monitor all communications to all of the devices linked to Jarrison Time and to perform background tasks like automatic emails, backups and all other planned events.

The Engine icon will have **green** waves if all devices are online, **red** waves if all devices are **offline** and **orange** waves if at least one device is offline while others remain online. The icon will have **purple** waves if the Engine is not running. If any unit is offline, please contact the network administrator or your supplier, as no clockings or employee updates will be possible with offline devices.

Right-clicking on the icon will allow starting or stopping of the service, or checking status if it has become unsynchronized (colours).

AUTOMATIC USER NOTIFICATIONS

From '**User**', '**User Groups**', **Access** tab it's possible to configure notifications if no clocking import has occurred after the specified items, or if the number of queued items becomes excessive.



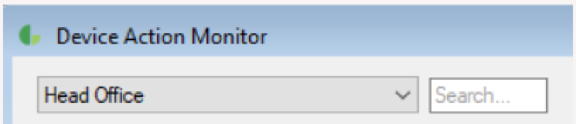
When triggered the notification will be shown on screen for any user assigned to the User Group.

Device Action Monitor

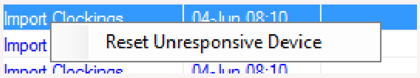
Since the Engine runs as a service it has no direct interface, however its activities can be seen from '**Access**', '**Device Action Monitor**'. This provides snapshots of what the engine is busy with at any given time. Note that the user machine's time needs to be synchronized with the server time in order for the Monitor to reflect accurately.

All devices, which are in correct working order (powered on and accessible through the network), are displayed in blue and have 'Online' as their description. Any device which is not connected to the network or has no power, will be displayed in red and show 'Offline' as the current status.

You can set the display to only show devices from a specific area by selecting the **Area**. To enable the **Area** selection box, right-click on the icon in the system tray and select '**Show Areas**'.



Note that if a ZK device has become unresponsive after successive communication attempts, the engine will suspend further attempts until the device is manually reset by right-clicking on it.



Recalculations 

The system calculates all daily totals by applying the rules to clockings and adjustments, and stores the results accordingly.

When to Recalculate

If any adjustments or shift configurations have changed then a recalculation is necessary. In the case of an employee having been assigned to an incorrect shift and then corrected, a recalculation is also necessary.

How to Recalculate

There is more than one way to recalculate, depending on where you are in the system.

Daily Details: You can click '**Recalculate**', or press <*> or <F10> on the keyboard (recalculates that day only).

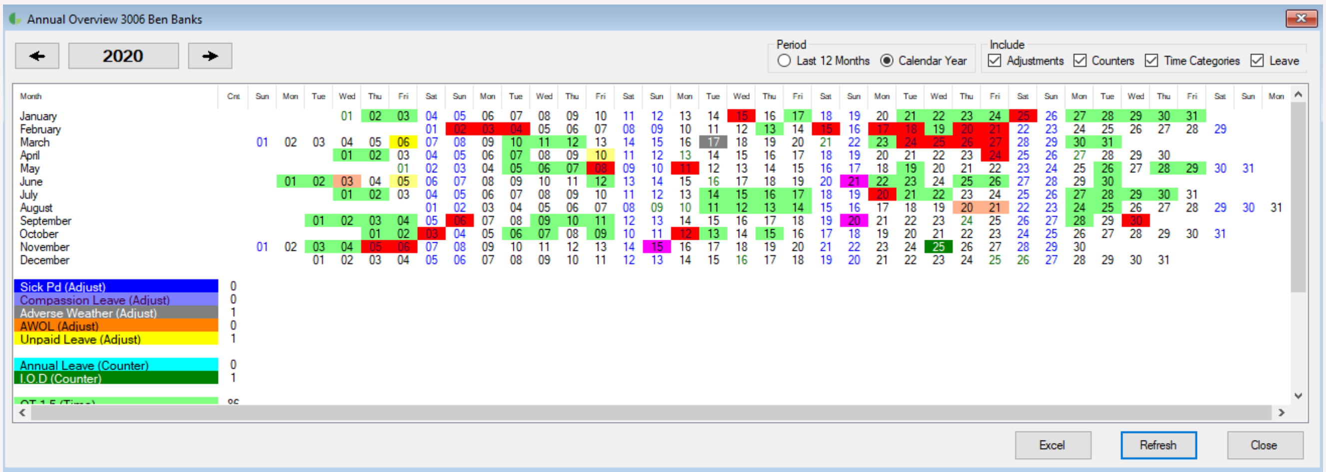
Daily Summary: You can click the '**Recalculate**' button. This will recalculate all days listed in the summary view (excluding future dates).

Bulk Recalculation: Click on '**Action**' then '**Recalculate**' from the menu bar. Enter the recalculation dates, and then click '**Recalculate**'. This will recalculate for the selection in the list or filter. The selection would typically be set to '**All employees in list**' or '**All employees in filter**' when performing a bulk recalculation. This method can be used to calculate ahead of the current period, as well as to reset any applied Alternate Day Programs.

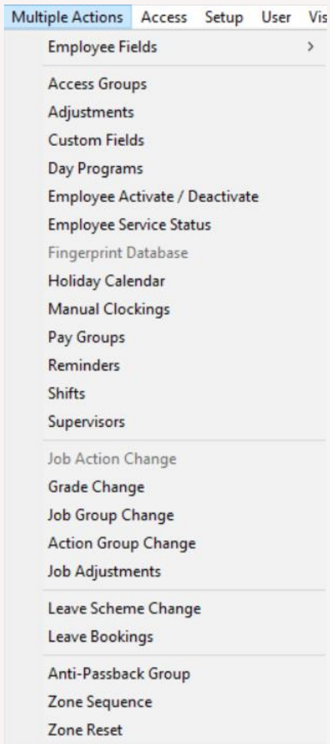
Recalculations can also be setup through **Planned Events** to run at a particular time or day.

Annual Overview

The **Annual Overview** is used to identify patterns or monitor overall performance for an employee. To view this annual overview click on '**View**' then '**Annual Overview**' from the menu bar. You may need to set the **Adjustments**, **Time Categories** and **Counters** that are displayed on this overview in their respective setup windows. The last 12 months or full calendar year may be viewed, while including any combination of **Adjustments**, **Time Categories** or **Counters** although only one can be displayed on any specific day at a time. If the Leave module is enabled, Leave types can also be shown.



Multiple Actions



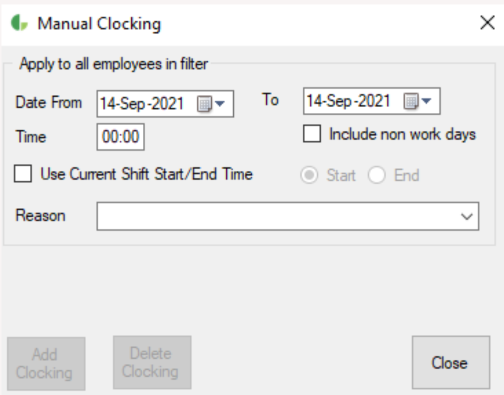
Multiple actions are available to apply bulk changes to a selection of employees. To apply any multiple action, group the employees using a filter, as described in the **Filters** section, then click on '**Multiple Actions**' from the menu bar, then select the desired Multiple Action.

Multiple manual clockings can be used to add clockings for of a group of employees, who were not able to clock for whatever reason.

To do this, enter the date, clocking time and an optional reason. To enter the shift start as the clocking time place a tick in the '**Use Current Shift Start/End Time**' checkbox. The same can be done for shift end times This will apply whatever shift times employees are on, so for example if a filter of employees on various shifts is loaded each employee will have a clocking time related to the shift they're assigned on.

The clocking can also be applied across a range of time by selecting appropriate From and To dates. If using a date range there is also a checkbox option for applying the clocking on non-working days.

Then click on the '**Add Clocking**' button.



Deleting clockings work the same way.

A multiple adjustment is very similar to a daily adjustment, explained in the **Daily Details** section. The difference is the date range option, and the ability to use one adjustment for all employees in a filter.

For example, one would apply an adjustment to many employees in the event of a manual public holiday, or a group bonus. Another use would be an adjustment spanning multiple days, e.g. Annual leave or Maternity leave.

1. Click on '**Action**' then '**Multiple Adjustment**' from the menu bar.

2. Select **Adjustment Type** and **Time to Allocate**.

3. Select the amount of time to allocate.

4. Select '**Override Clockings**' if necessary and '**Include Early Times**' and '**Include Late Times**' if necessary.

5. Add a '**Comment**' if necessary (recommended).

6. Select the '**From**' and '**to**' dates (the system will include the dates selected).

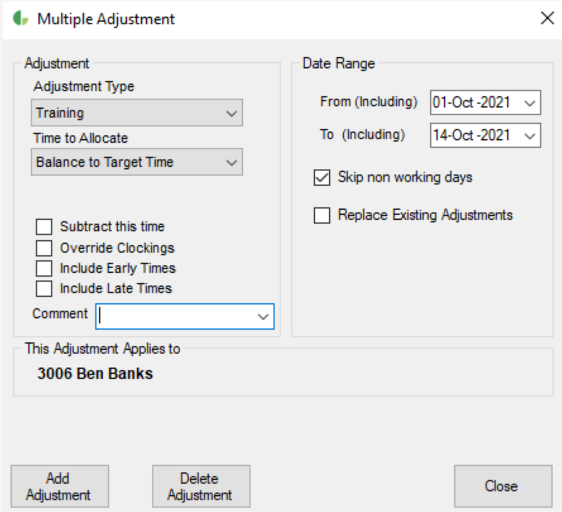
7. '**Skip non-working days**' will only add the adjustment to Work Days.

8. Click '**Add Adjustment**' on the bottom.

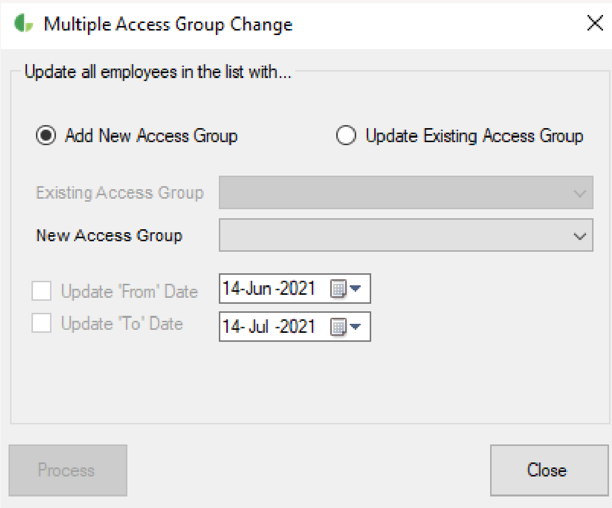
Notes:

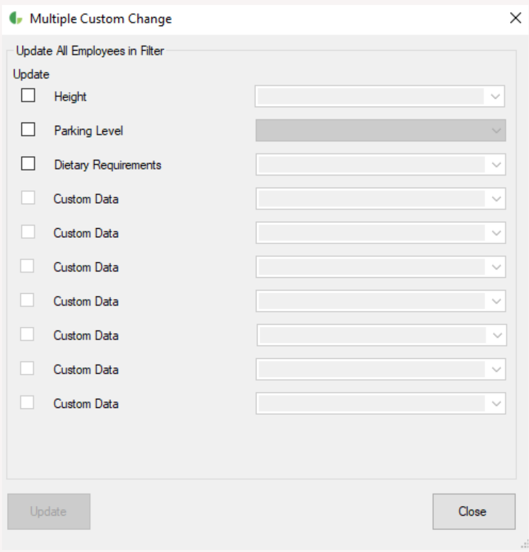
The '**Replace Existing Adjustments**' option will replace all existing adjustments having the same **Date** and **Adjustment Type**, with the new details entered. If the adjustment does not exist, it will be added as normal.

If you have erroneously added an incorrect adjustment, you can delete the adjustment(s) by selecting the same date range and adjustment type, and then click '**Delete Adjustment**'.

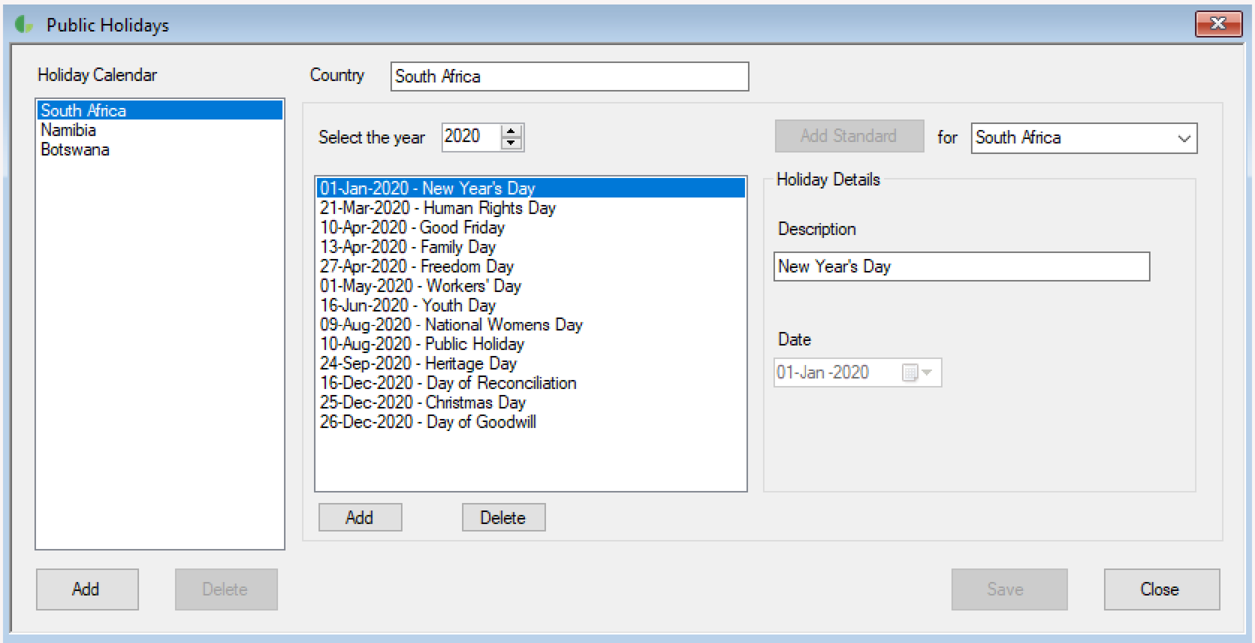


You can also '**Activate'** or '**Deactivate'** all employees in the list, change the **Shift**, **Pay Group, Clocking Group, Access Group, Custom Employee fields**, as well as several others from the **Multiple Actions** menu. Note that **Employee Details** screen options appear in the '**Employee Fields**' sub-menu under '**Setup**'.





Public Holidays



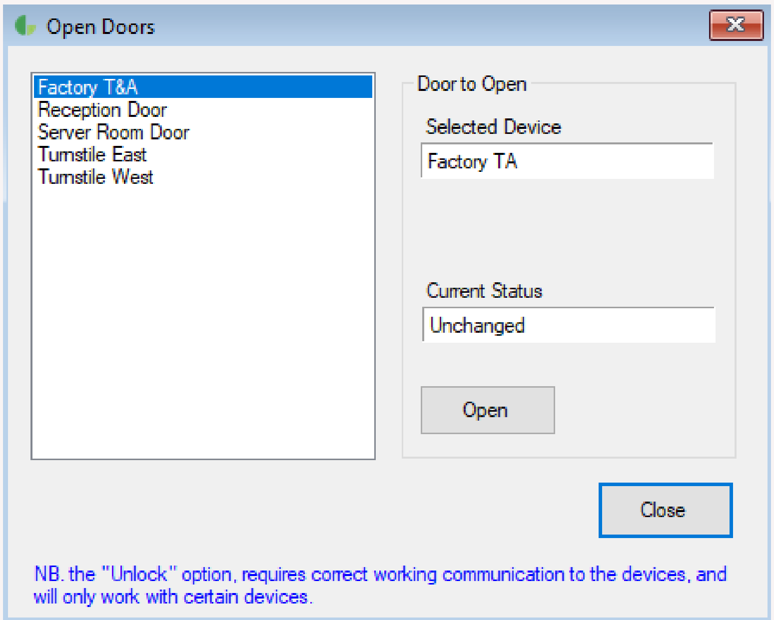
Jarrison Time can recognize public holidays and apply different rules accordingly.

To manage public holidays click on '**Setup**' then '**Public Holidays**'. If there are no public holidays in the list you can add the RSA Standard statutory holidays by clicking the '**Add Standard**' button, or simply add your own manually. If you are outside of SA you can add your own country's holidays by clicking '**Add**' under **Holiday Calendar**. At the beginning of each year Jarrison will prompt you to add the standard SA holidays, this button will be greyed out the rest of the time.

The holiday calendar can also be used to provide a solution to cases where, for example, employees would receive normal pay on a public holiday occurring on a Sunday (getting the actual public holiday on the Monday) where other employees would receive public holiday pay on the Sunday. In such a situation, one holiday calendar would be created with all public holidays left in, and another created where the Sunday public holidays have been removed, leaving only the Mondays.

An alternative solution to the Sunday/Monday public holiday would be to create differently functioning public holiday Day Programs. See Configuration manual for more info on Day Programs.

Opening Doors Using JT



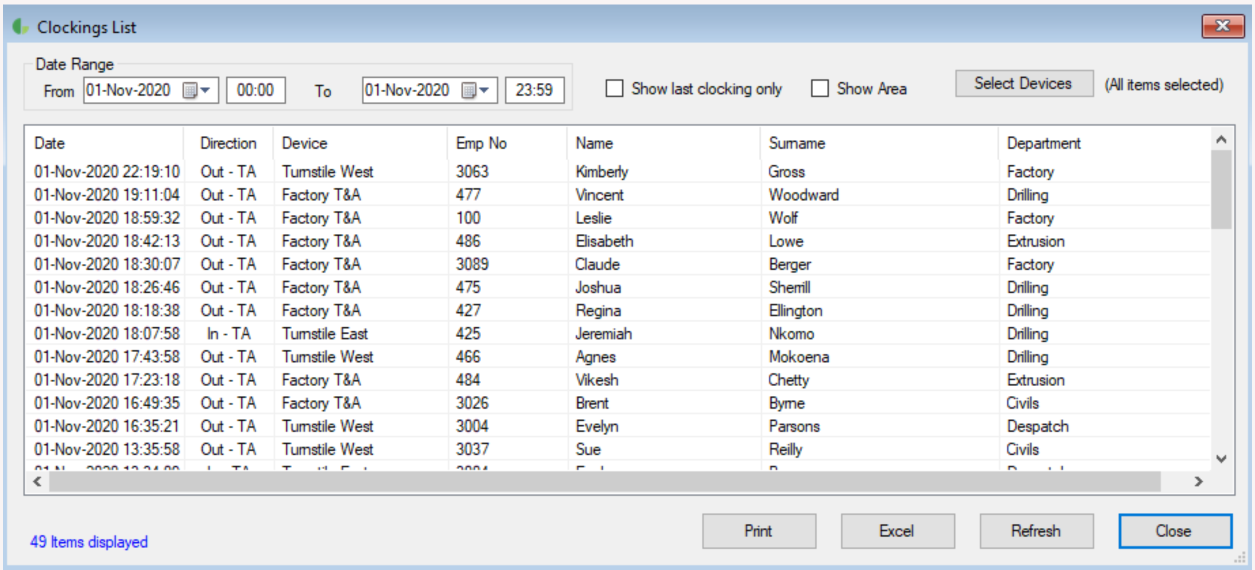
(This can only be done if you have Jarrison Time connected directly to biometric readers.)

To open a door for the amount of time as setup for that door, click on ‘**Access**’ then ‘**Open Doors**’ , select the door to open and click on ‘**Open**’.

In an emergency one can click on ‘**Unlock all Doors**’. To lock them again you can click on ‘**Close All Doors**’.

Note that Morpho devices provide ‘**Open**’ and ‘**Unlock**’ options, where other devices only allow ‘**Open**’. Opening a door triggers the relay in the same way as a clocking would, unlocking a door holds the relay open.

Clocking List



The **Clocking List** is used to show all clockings from the selected devices for all the employees in the list. Enter the dates and times required in the **Date Range**. The clockings with their details can be sorted by clicking the top of the column (column header) and exported to Excel or printed directly to the default printer.

To view only the last clockings of the selected employee(s), check the box next to '**Show last clocking only**'.

'**Show Area**' will appear if JT Clock is enabled, and display the Area.

If the system hardware configuration is suitable this window can also present Temperature reading and Face Mask Detection information.

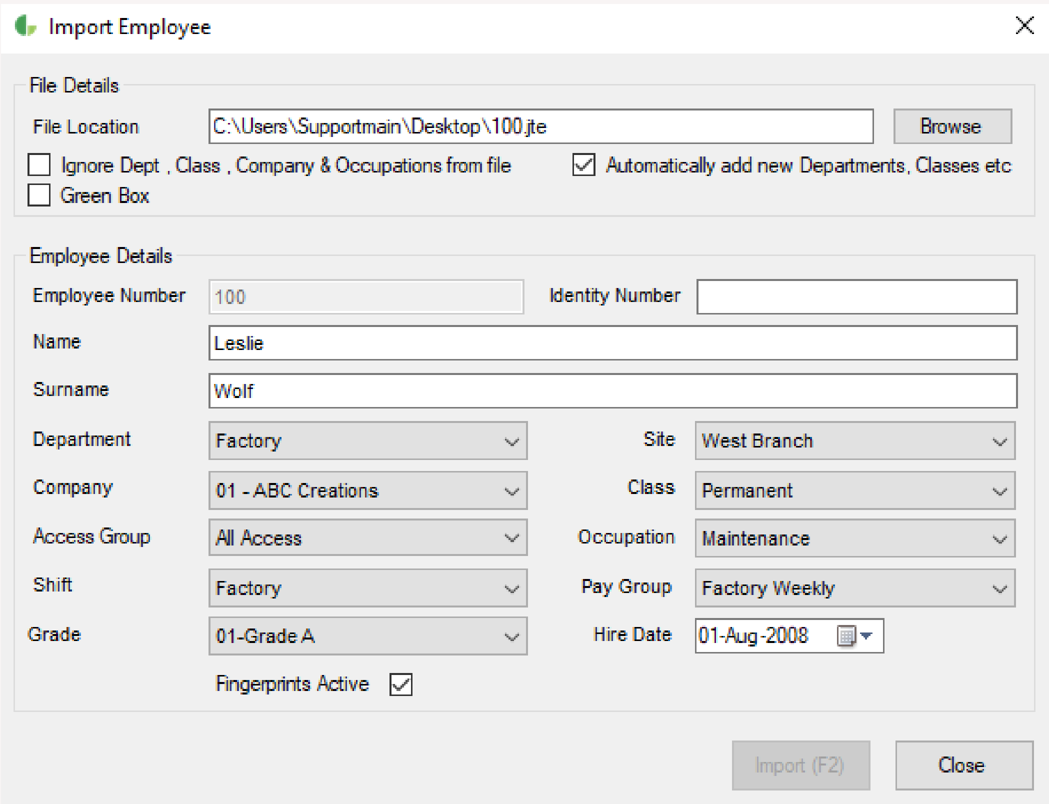
Manual Import of Employees

To import an employee which has been exported from another site, click on '**Import**' then '**Employees from file**' from the menu bar, then browse for the .jte files or .zip file.

If you are importing from the **GreenBox**, **GreenForm** import format, you will need to browse for the entire folder created for the exported employee. When importing from GreenForm a photo is displayed before importing. Once imported you can select the correct department etc., then click '**Save**' and the employee details will be included as usual in your system.

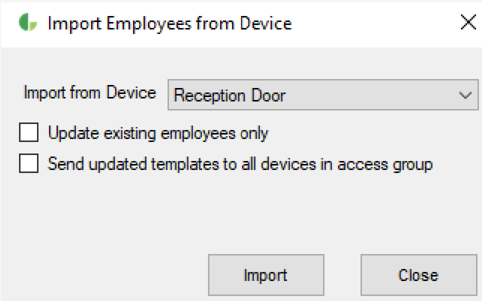
To have the GreenForm's banking details imported into JT, you will need to have the custom fields labelled exactly

'Bank Name', 'Branch Code', 'Bank Acc Nr' and 'Acc Holder'. Then JT will import from the 'BANK_NAME', 'BRANCH_CODE', 'BANK_ACC_NR' and 'ACC_HOLDER' fields from the XML file in the GreenForm folder.



Importing Employees from Device

It is possible to import employee information from devices controlled directly by Jarrison Time. This can be done from ‘**Import**’ ‘**Import Employees from Device**’.



Select the device to import from. There is an option to ‘**Update existing employees only**’ - this is suitable for only updating employees in the Jarrison database, and not bring in any arbitrary profiles that might be enrolled on the device.

There is also an option to ‘**Send updated templates to all devices in access group**’ to automatically distribute newly imported templates from the selected device to all others in an employee’s Access Group.

Export of Employees

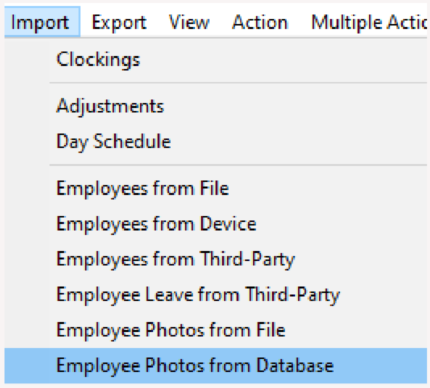
Employees can be imported and exported, from both Jarrison Time and JT Lite software. To export the employee shown in the employee list, click on ‘**Export**’ then ‘**Employees**’ from the menu bar, then select ‘**To Email**’ or ‘**To File**’ option. If you intend to export to file you will need to browse to the desired export location first (this location is stored for the next export). If you select the ‘**To Email**’ option, you have the option of typing in the email recipient’s address in the same window (this too will be stored for next export).If you wish to export all employees in the list you will need to select the ‘**Zip file**’ option as adding too many attachments to an email can become problematic.

Import and Export of Employee Photos

Employee photos can also be imported and exported. Click on ‘**Import**’ then ‘**Employee Photos from File**’ or ‘**Export**’, ‘**Employee Photos**’. The name of the file must be the employee number and the extension must be .jpg. During the import JT will match the employee number on the file and import it into the employee in JT with the same employee number. Similarly, the export will name the file using the employee’s employee number as well.

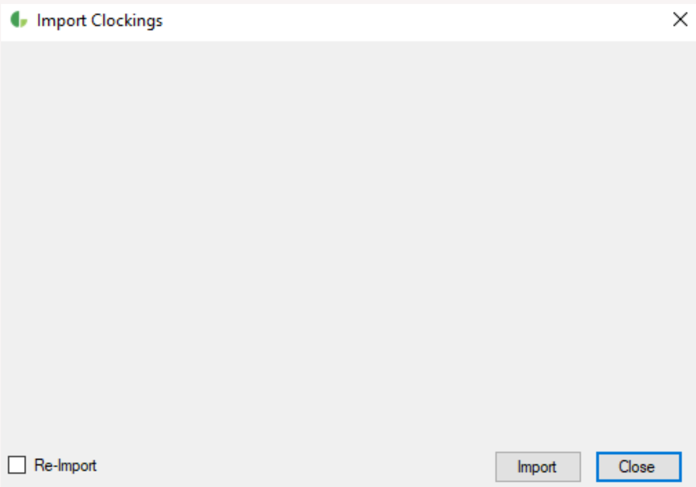
Once imported, these photos can be converted for use with compatible Hikvision or ZK Teco devices as Bioface templates via right-click option of **Employee Details**, **Access**, **Enrollment** tab, or from the **Multiple Action** option '**Copy Profile Photo to Bioface Template**'. These photos should conform with standard requirements for facial enrollment:

- Position face 50 to 80cm from device
- Use a clear white background
- Face the device directly with a neutral expression
- Head should not be tilted
- Do not wear any facial accessories or coverings such as glasses, mask etc.
- Hair should be away from eyes and eyebrows
- Eyes open with irises easily seen
- No more than one face in the capture area
- No other objects in the capture area
- Light should be evenly-distributed on the face (no shadows)



If Jarrison Time is linked to an external database an import option for importing photos from the external database to use as profile pictures will be available under **Import**.

Import and Re-Import of Clockings



To import clockings manually (import immediately, not waiting for the device engine to import on its schedule), you can click on '**Action**' then '**Import Clockings**' from the menu bar, then click on '**Import**'. The system will collect the clockings and then calculate the daily totals according to each employee's shift rules.

After the import, a summary is displayed showing the number of clockings and date range imported. In some cases the Device Engine will collect the transactions automatically and this step need not be conducted.

Re-Import (Why a re-import may be necessary)

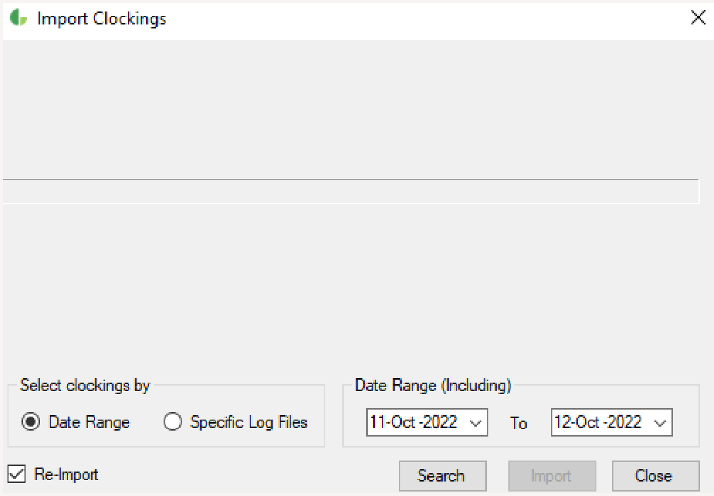
If there was some form of interruption during the standard import (for example PC losing power, network failure etc.).

The database was restored from a previous backup.

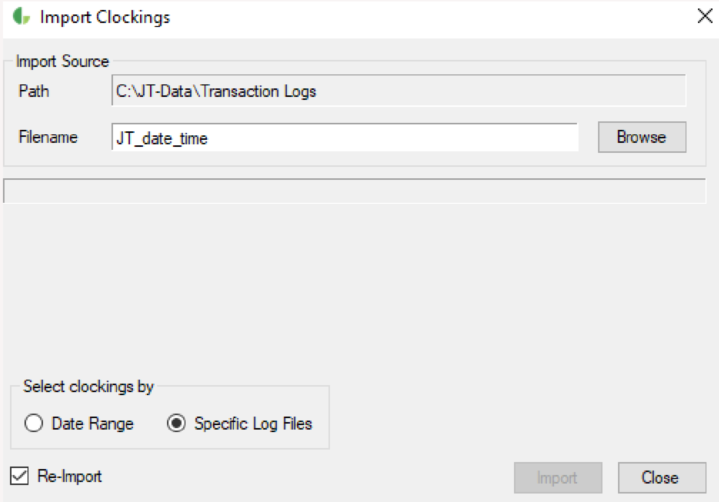
Employee was allocated to the wrong Clocking Group.

Date Range

Select the dates for transactions to re-import, then click on '**Search**', this will find any transaction log files from the C:\JT-Data\Transactions\ folder on the Engine PC. Now click on '**Import**', Jarrison Time will import and then recalculate for the affected employees and not import duplicates.



Specific Log Files

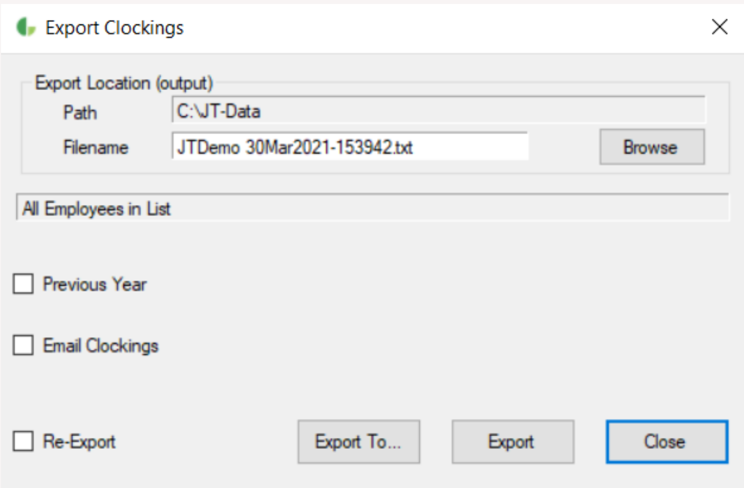


To import from one file only or selected files, select the '**Specific Log Files**' option, then browse for the file(s) - you can select more than one transaction file. If you select '**Only for employees in the list**' JT will only re-import for employees in the current list. This is useful for importing for one or more employees who had been allocated to the incorrect clocking group.

For systems not connecting directly to the hardware you will only be able to select the date range option.

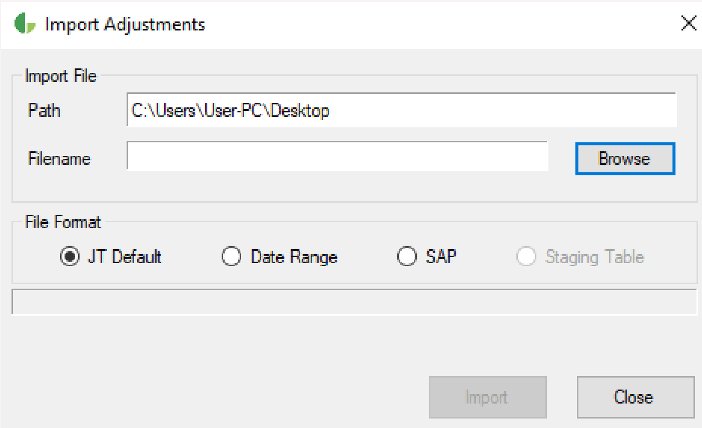
Export of Clockings

This can be done for the current or previous year via '**Export'**, '**Clockings**'. Clockings exported using this method can be re-imported in JT using the **Remote Clocking** option.



Import and Export of Adjustments

To import adjustments from an external source, click on '**Import**' then '**Adjustments**'.



If adjustments like Annual Leave or Sick pay etc. are managed in an external program and can be exported then they can be imported into JT using the format below. JT will recalculate for the affected dates. Similarly, adjustments can be exported for an external system to import.

There are a couple of CSV template format options to import adjustments, they can be found in the **C:\Program files\Jarrison Systems\Jarrison Time** folder. The import file needs to contain the header record similar to the below:

EmployeeNumber,Date,Adjustment,Allocate,Time,Comment,Override,Subtract,Early&Late,Name,Surname

12345,02-Jul-2009,43,4,0.25,Travel,N,N,Y,John,User

1. Employee Number - Alphanumeric must be same as employee number in JT

2. Date of Adjustment - Format DD-MMM-YYYY e.g. 01-Feb-2013

3.Code from Adjustments in JT - To get this, go to **System Configuration**, **General1**, select '**Show codes**', then see the existing code in the **Adjustments** window

4. Allocate - Time to allocate, as in Daily Details,0="Balance to Target Time", 1="Any Interruption",2="Allow Late Arrival" ,3="Allow Early Departure", 4="Custom Time", 5="Custom Counter"

5. Time - Amount of adjustment time Decimal e.g. 5.5

6. Comment - Optional

7. Override - Y or N (N if blank)

8. Subtract - Y or N (N if blank)

9. Early&Late - Y or N (N if blank)

10. Name - Optional (Will be used if an error occurs during import)

11. Surname - Optional (Will be used if an error occurs during import)

The date format is dd Month yyyy. The '**Adjustment**' and '**Allocate**' codes are the codes assigned in Jarrison Time to the adjustment type and time category to allocate. To view these codes you will need to activate the '**Show Codes**' option in **System Configuration**. The time is required in decimal format i.e. five and a half hours would be 5.5. The name on the end is optional but it will help when importing adjustments for an employee who is not in JT.

If the external system can export adjustments with date ranges, JT can import them using the below format.

Employee Number,Start Date,End Date,Adjustment,Allocate,Time,Comment,Override,Subtract,Early&Late,Skip non-working days,Name,Surname

015,25-Feb-2015,03-Mar-2015,13,4,0.55,Jason,Y,N,Y,Y,John,Smith

1. Employee Number - Alphanumeric must be same as employee number in JT

2. Start Date of Adjustment - Format DD-MMM-YYYY e.g. 25-Feb-2015

3. End Date of Adjustment - Format DD-MMM-YYYY e.g. 04-Mar-2015

4.Code from Adjustments in JT - To get this, go to **System Configuration**, select '**Show codes**', then see the existing code in the **Adjustments** window

5. Allocate - Time to allocate, as in Daily Details,0="Balance to Target Time", 1="Any Interruption",2="Allow Late Arrival" ,3="Allow Early Departure", 4="Custom Time", 5="Custom Counter"

6. Time - Amount of adjustment time Decimal e.g. 5.5

7. Comment - Optional

8. Override - Y or N (N if blank)

9. Subtract - Y or N (N if blank)

10. Early&Late - Y or N (N if blank)

11. Skip non-working days

12. Name - Optional (Will be used if an error occurs during import),

13. Surname - Optional (Will be used if an error occurs during import)

STAGING TABLE

It’s also possible to import adjustment information from a JT SQL table that has been populated by another system. The table layout is similar to the template for importing with dates. If no “End” date is specified (NULL value) it will use the “Start” date as end date as well. If an adjustment should be deleted a “D” should populate the **Action** column (normally NULL if adding).

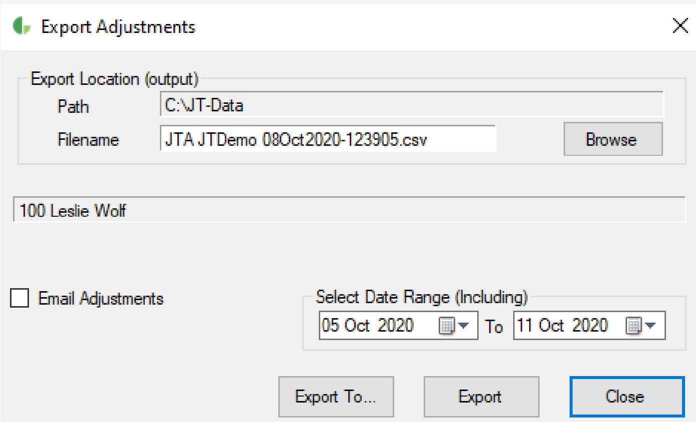
CustKey is the customer site code that can be seen on JT's status bar.

The Key value should be unique (no duplicates allowed).

Entries older than 90 days are removed at each export.

Adjustment Export

Exporting adjustments is available from ‘**Export**’, ‘**Adjustments**’ on the menu.

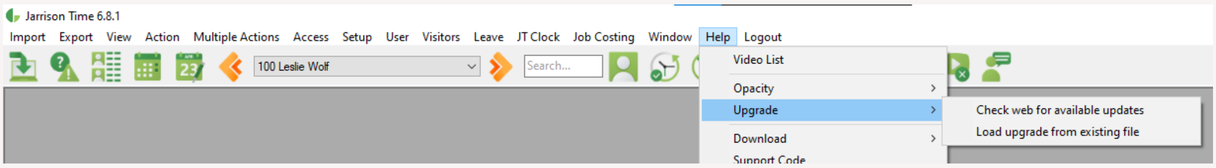


Upgrading Jarrison Time

From Jarrison Time software

Click on '**Help**', '**Upgrade**' then '**Check the web for available updates**'. If a newer version is available, you can download it. Jarrison Time will download it into the system, close Jarrison Time then begin the upgrade. All users will need to be signed out of Jarrison Time before upgrading. Once users log in after the download they will be prompted to upgrade automatically i.e. only one user needs to upgrade. The Engine must be stopped before upgrading.

In Jarrison Time software click on '**Help**', '**Upgrade**' then '**Load Upgrade from existing file**', browse to the saved zip file and select '**Open**'. JT will load the file into the system. Each time a user signs into JT, JT checks for any updates within the system and will begin the install process if a newer version is present. Each user should follow the default options ('Next', 'Next', 'Next', 'Close') until the latest version is installed on their PC.



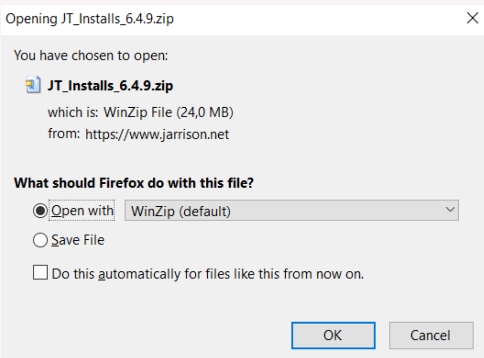
Note that program installation may require Administrator privilege, depending on the environment.

Manually from the Web

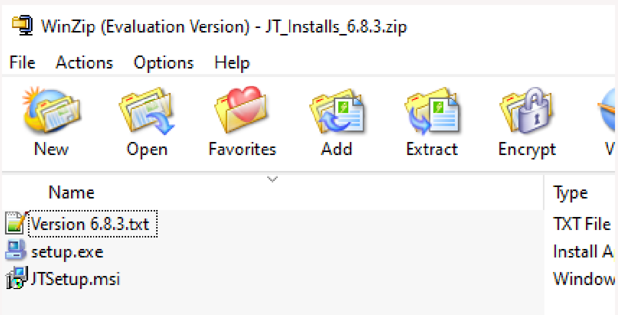
You can upgrade Jarrison Time, JT Tools or JT Support from the web site, https://jarrison.systems, You will need to have all users signed out of Jarrison Time. If the Device Engine is still running, it will prompt the user to restart after the upgrade.

Click '**Open**' and wait until the file has completed downloading. Save the file then run Setup. It will then open an extraction program like Winzip.

1



2



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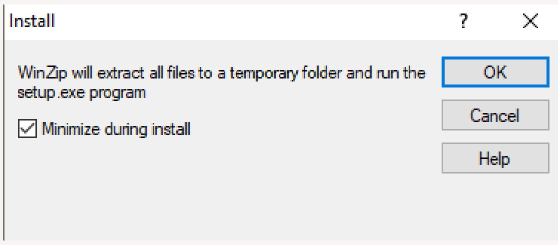
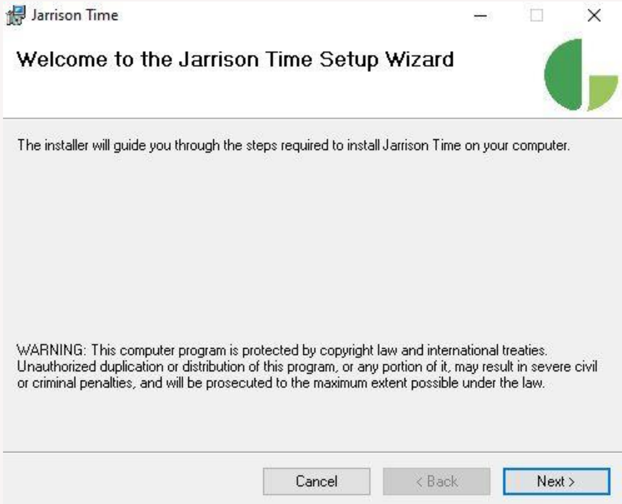


4



Close the WinZip window upon completion.

Click on '**Next**' until installation is complete

Manually from the downloaded file:

This upgrade method is only necessary for multiple users who do not have sufficient access to the internet. You will need to have the latest upgrade file available to load into the system. To download it from the Internet, navigate to www.jarrison.systems, and go to **Downloads**, then save the file to your computer. It can be saved on the desktop or a flash drive etc.

Fingerprint Search and Matching (Morpho)

If you have a Sagem MSO300 with the 'Ident' licence embedded (or Ident dongle) and employees who have been enrolled for Morpho readers, then '**Matching**' will be possible. With '**Matching**' enabled JT will search through all existing fingerprints for a match during the enrollment. The same finger cannot be enrolled for a different person. This will prevent "ghost" employees or any person being enrolled twice on the system. In addition to matching you can **search** for employees in the list by scanning the employees' fingerprints.

To enable this option, click on '**Access**' then '**Fingerprint Matching**' from the menu bar. To search for an employee from his/her fingerprint click on '**Access**' then the employee search window from the 'Access' menu. Click on '**Scan**' and place the employee's finger on the MSO as if you were enrolling an employee. If the employee has been enrolled in Jarrison Time, terminated or not, their details will be shown in the search window. The details to show on this screen can be configured in the .ini file.

There are 12 boxes on this window to display information. The first two boxes on the top will always be the 'Employee Number' and 'Name'. The rest of the box (from 3 – 12) will use the entries from the .ini.


```
Search1=Department

Search2=Custom7

Search3=Company
```

If you only want Employee Number, Name and Department, then all you need in the .ini file is "Search1=Department". All possible entries to show in this 'Fingerprint Search' window are listed below.

Department

Class

Occupation

Company

ID Number

Hire Date

Shift

Pay Group

Custom1

Custom2

Custom3

Custom4

Custom5

Custom6

Custom7

Custom8

Custom9

Custom10

Access Group 1

Access Group 2

Access Group 3

Access Group 4

Backups

There is an option to automatically perform a backup on a daily basis when the user logs out of the system. The Engine, if running, can also be configured to perform a daily backup at a set time every day. It can be configured to keep only the latest files if disk space is a concern.

To make a backup of the data manually, simply click on '**Action**' then '**Backup Database**' from the menu bar. You will have the options of a '**Standard JTime**', '**Supplementary**', '**Zip and Email**', '**Full System**' or '**Backup to specific location**'.

The Standard option will include the primary JTime database and current logs.

Supplementary backs up only the JT_Supp database.

Full System will backup all Jarrison databases (entire log history and supplementary) in one package.

The zipped backup will reduce the size of the backup file, which is recommended.

The zip and email feature enables you to send the backup file off site via email.

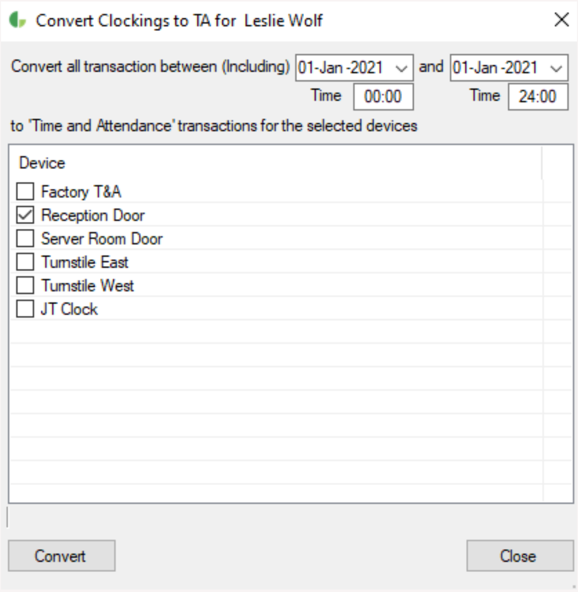
There is also an option to backup to '**JTime Cloud'**, this will upload the backup file to a secure Jarrison Systems server. This option is only available to the Administrator account.

Convert Clockings to T&A

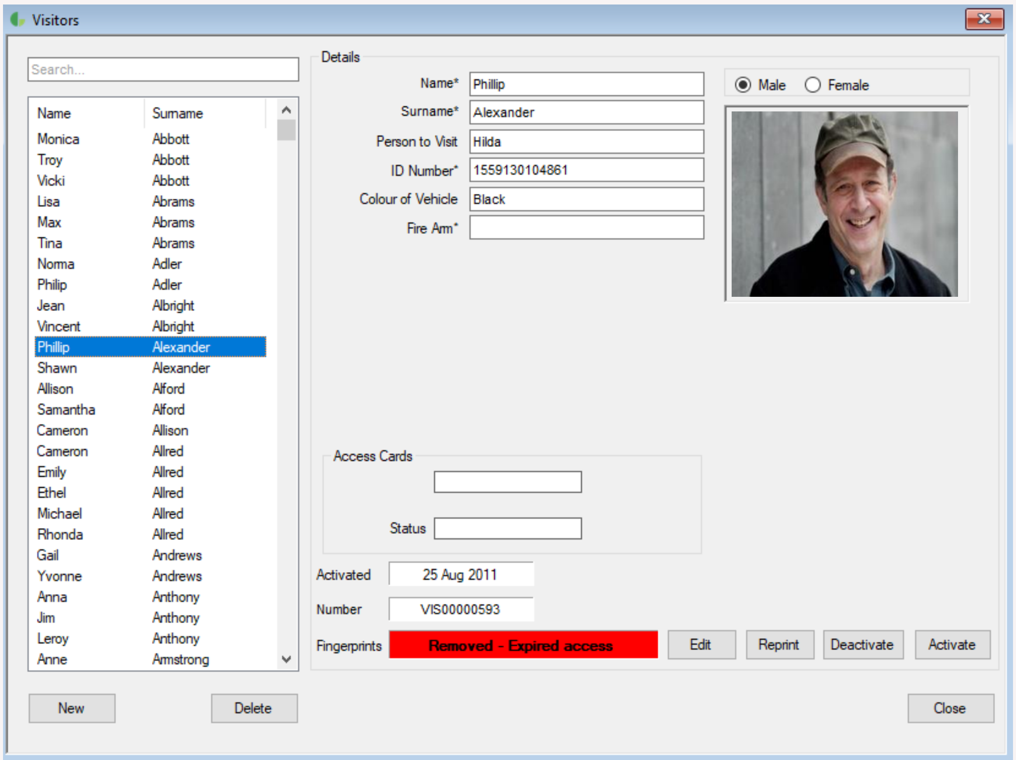
This can be used to convert any Access Control clockings to Time and Attendance clockings. Access Control clockings are transactions collected directly from devices which have been configured as Access Only, or if clocking groups are being used then transactions collected from devices which are not part of that particular employee/s **Clocking Group**. These Access Control transactions are not used in the calculation of hours. To convert these access control transactions to T&A, simply select the devices and the dates and then convert.

You may need to convert clockings to T&A if employee/s have been incorrectly assigned to a clocking group which regarded their transactions as Access Only.

Note that by converting the clocking type, the original clocking is being altered and therefore it will be seen as a Manual clocking (Altered clocking).



Visitors Management

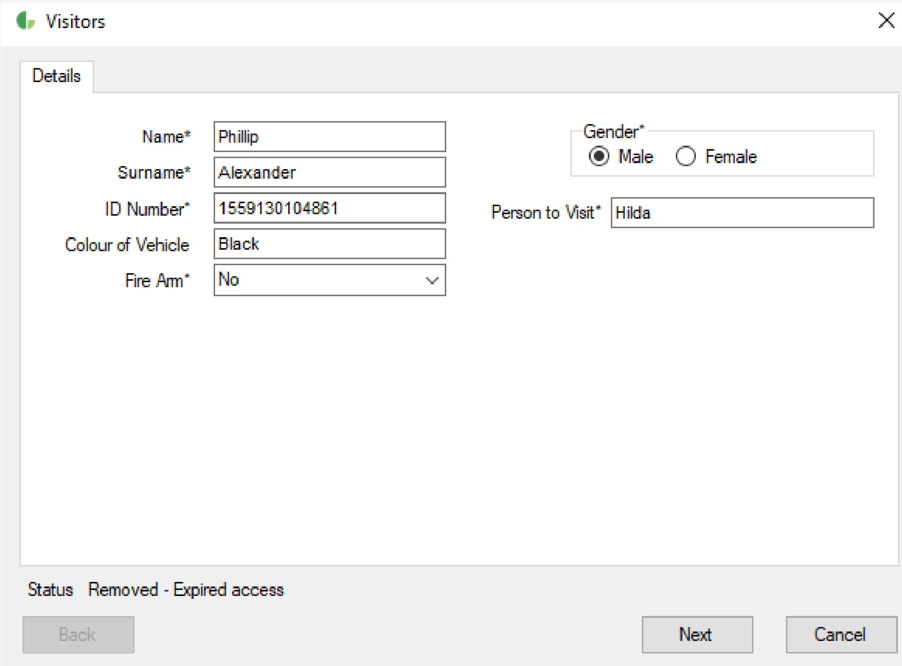


This module in Jarrison Time allows you to record visitors' details and their movements on your site and grant them access to certain locations for the day. It will also allow you to save their photos and document photos. An optional indemnity form can be printed after enrollment. All of this information can be reported on too. Note that this module requires Sagem Morpho, or ZKTeco devices in order to function.

Visitors View

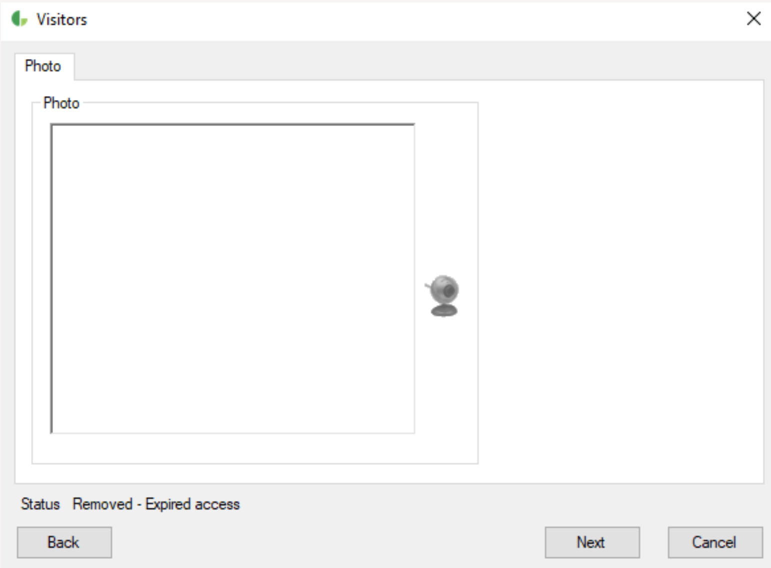
Click on '**Visitors**' from the menu bar, then '**Manage**'. JT will list all of the existing visitors in the system. Note that the Visitor Module must be enabled from **System Configuration** before the Visitors options become available for use. To **search** for a visitor, simply enter any part of any of the details fields in the search bar at the top of the screen. You may '**Activate**' (grant access to the specified devices for the day) or '**Deactivate**' the visitor (remove from all devices), depending on your access level into the system. If activated, an indemnity form may be re printed on demand or his/her details edited by clicking the '**Edit**' button. This window will show the fingerprint status, either 'Added to the device', 'Removed from the device/s', 'Waiting to be added' or 'Waiting to be removed from the device/s'. This status is refreshed periodically to monitor the progress of adding or removing the visitor to or from the devices.

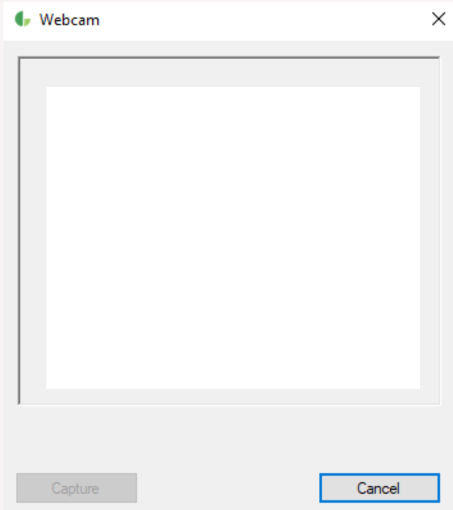
Visitors Details

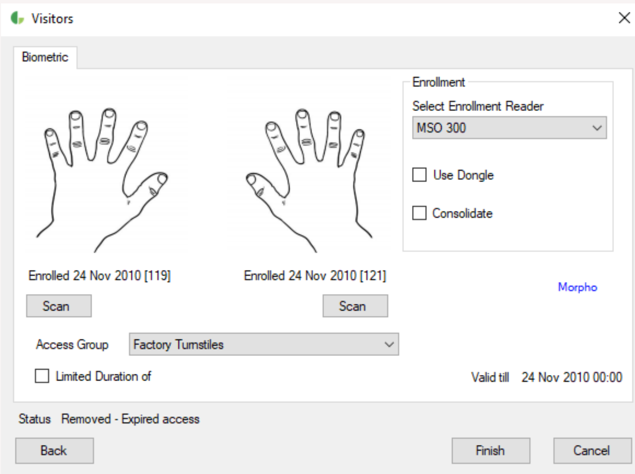


When you '**Add**' or '**Edit**' a visitor the first screen appears which will require you to complete all of the necessary fields. You will not be able to go to the next screen until all Required fields have been completed.

The next screen requires you to capture the visitor's photo. If a photo of a document is also required the next screen would enable you to take a photo of the document.







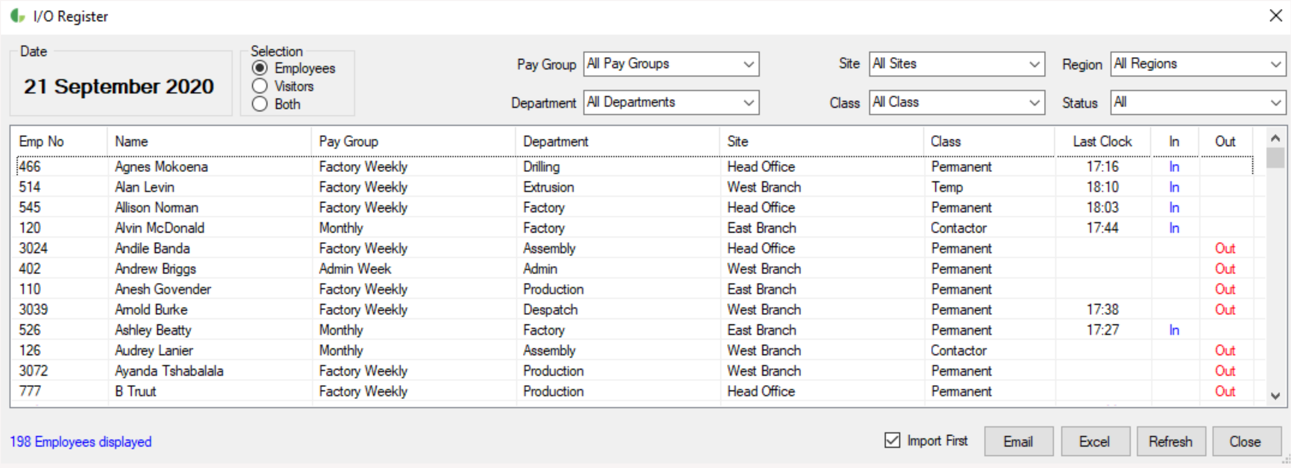
The final screen enables you to capture the visitor's fingerprints. A '**Limited Duration**' of visit time may be specified, otherwise access will be removed at midnight. If the indemnity form is configured to print, it will print automatically when you click finish.

In/Out Register

The In/Out Register is used to show which employees are currently in or out. Click on '**View**' then '**I/O Register**' from the menu bar to open this window.

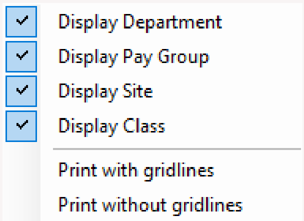
You can filter employees by Site, Class, Department, Area, and/or Pay Group. They can also be filtered according to their 'In/Out' status, 'All' (In or out), 'Only In', 'Only Out' or 'No Clocking' which will be displayed as 'Out'. The register will only include employees who are currently in the employee list.

These employees can be displayed in “Employee Number” or “Name” sequence. Note that devices whose clockings should contribute to this list must have the setting checked under **Devices**.



Emp No	Name	Pay Group	Department	Site	Class	Last Clock	In	Out
466	Agnes Mokoena	Factory Weekly	Drilling	Head Office	Permanent	17:16	In	
514	Alan Levin	Factory Weekly	Extrusion	West Branch	Temp	18:10	In	
545	Allison Norman	Factory Weekly	Factory	Head Office	Permanent	18:03	In	
120	Alvin McDonald	Monthly	Factory	East Branch	Contactor	17:44	In	
3024	Andile Banda	Factory Weekly	Assembly	Head Office	Permanent			Out
402	Andrew Briggs	Admin Week	Admin	West Branch	Permanent			Out
110	Anesh Govender	Factory Weekly	Production	East Branch	Permanent			Out
3039	Arnold Burke	Factory Weekly	Despatch	West Branch	Permanent	17:38		Out
526	Ashley Beatty	Monthly	Factory	East Branch	Permanent	17:27	In	
126	Audrey Lanier	Monthly	Assembly	West Branch	Contactor			Out
3072	Ayanda Tshabalala	Factory Weekly	Production	West Branch	Permanent			Out
777	B Truut	Factory Weekly	Production	Head Office	Permanent			Out

Right-clicking anywhere in the display area will present a context menu with print options, and that also allows for filter options to be enabled or disabled.



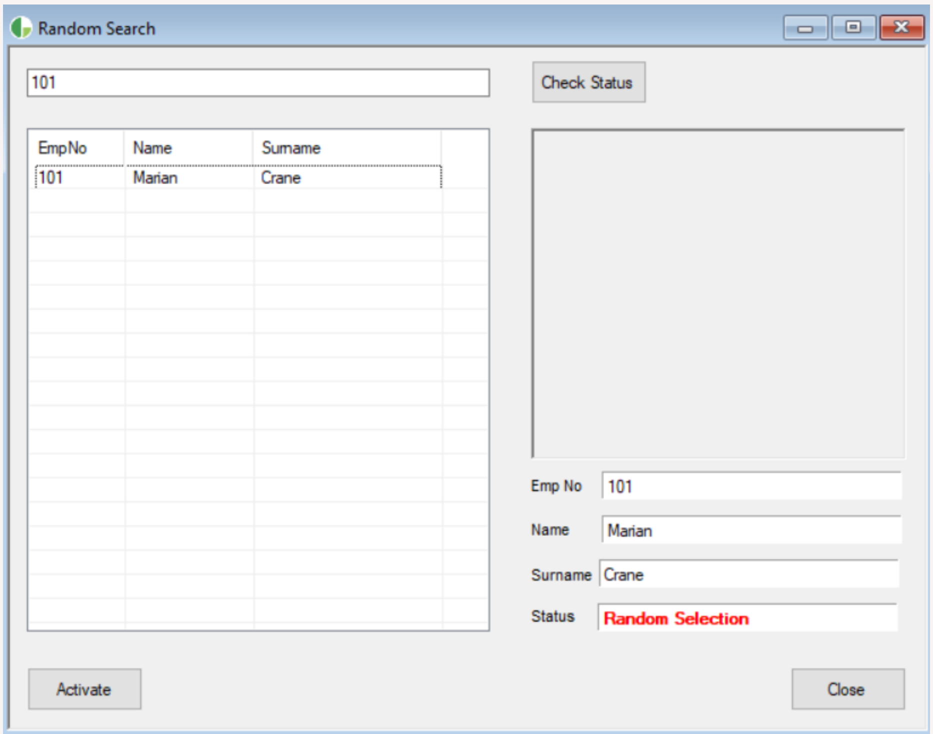
If a column has been sorted (by clicking the column header) then when printing, page-breaks will be inserted according to the sorted column. E.g. If sorting by department, each department will be separated by a page-break.

Random Selection

The **Random Selection** feature purposefully deactivates a random assortment of people each day, for the purpose of having them report somewhere (e.g. for a breathalyser test) as a result of being unable to clock. Please see the configuration manual for information on setting up the feature.

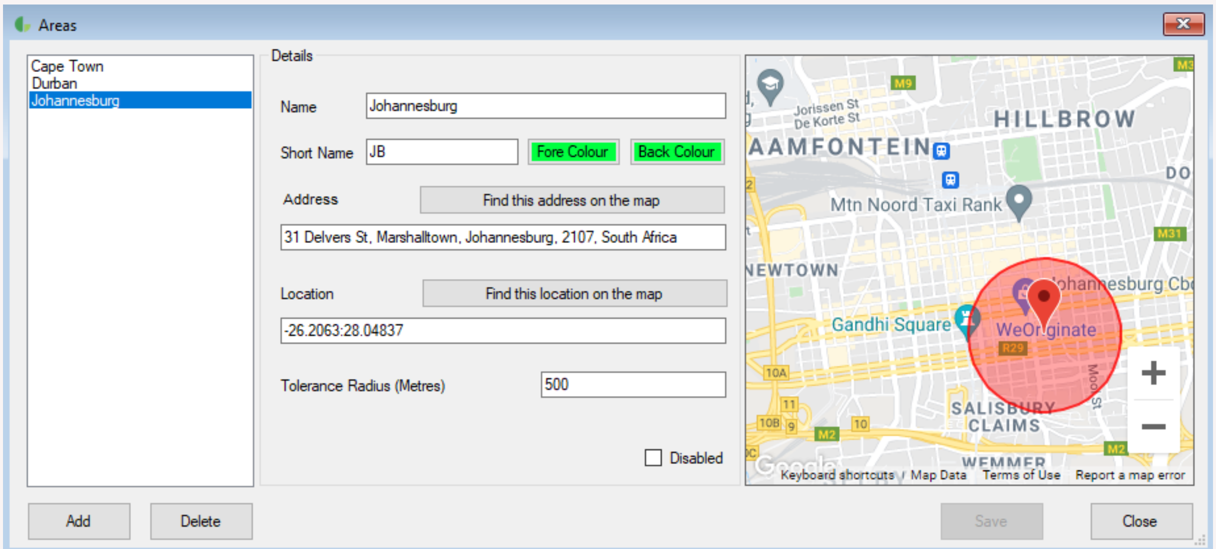
USE

From ‘**View**’ on the menu bar, and then ‘**Random Selection**’, a screen can be opened which allows for employees to be searched for, and activated. Each employee number to be checked will need to be entered, then click ‘**Check Status**’. Per user group permission, employees with Random Selection Status may then be activated by clicking the ‘**Activate**’ button.



Areas

Areas are designated ranges of co-ordinates which are permitted as clocking areas when using **JT Clock**. Areas are configured from '**JT Clock**', '**Areas**'.

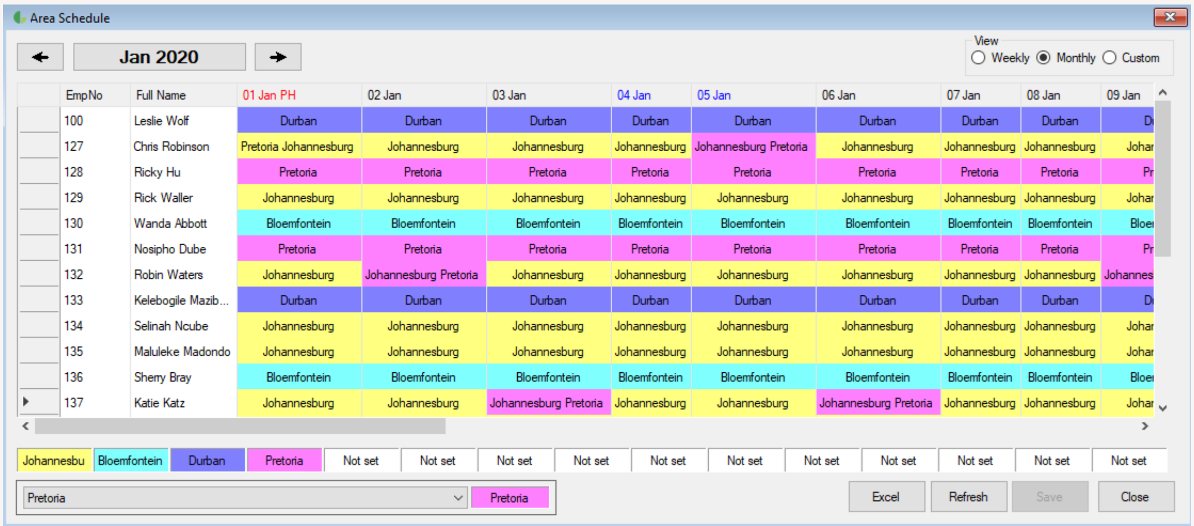


Click '**Add**" to begin defining a new area. Provide a name and short name, and then either type in an '**Address**' or '**Location**', select what you will search by (address or location) and click '**Find this address on the map**' or '**Find this location on the map**'. Double-clicking on the map will drop a pin to use as address. You can also set an allowable **Tolerance Radius** of what is considered within the area, in metres from the address or location entered.

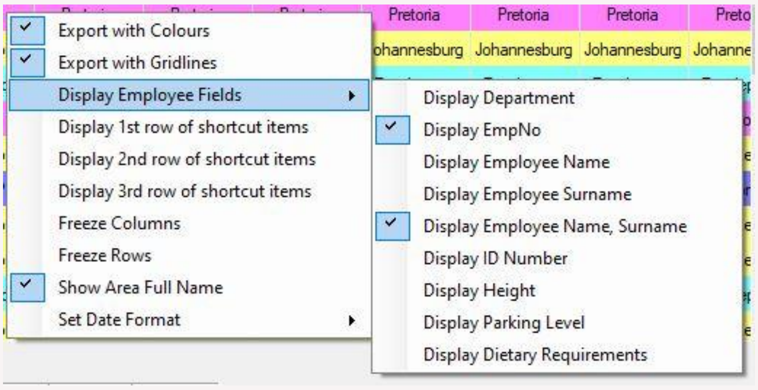
Custom colours for the **Area Schedule** to display can be set using **Fore Colour** and **Back Colour** for each saved **Area**.

Area Schedule

The Area Schedule can be used with JT Clock and works similarly to the Day Schedule, only it allows for assignment of clocking Areas rather than shifts. Note that Area Schedule needs to be enabled from '**Setup**', '**System Configuration** ', '**General-1**'.



Employee fields (number, name etc.) are shown on the left, the rest of the window is filled up with the Areas assigned for the selected date range. The date ranges shown can either be '**Weekly**', '**Monthly**' or '**Custom**' (any date range). The displayed columns can be chosen by right-clicking on a row, custom employee fields are also available.



To set the Area that an employee must work or has already worked, select the Area from the list of all available Areas at the bottom of the screen, and then click the date on the main window for the day the employee must clock in this newly-assigned Area. To assign more than one area in a day, hold down the <Control> key while clicking on the day. The colour of the day will display according to the first assigned Area. Multiple areas on the same day simply allow for more areas, there is no expected sequence of clocking.

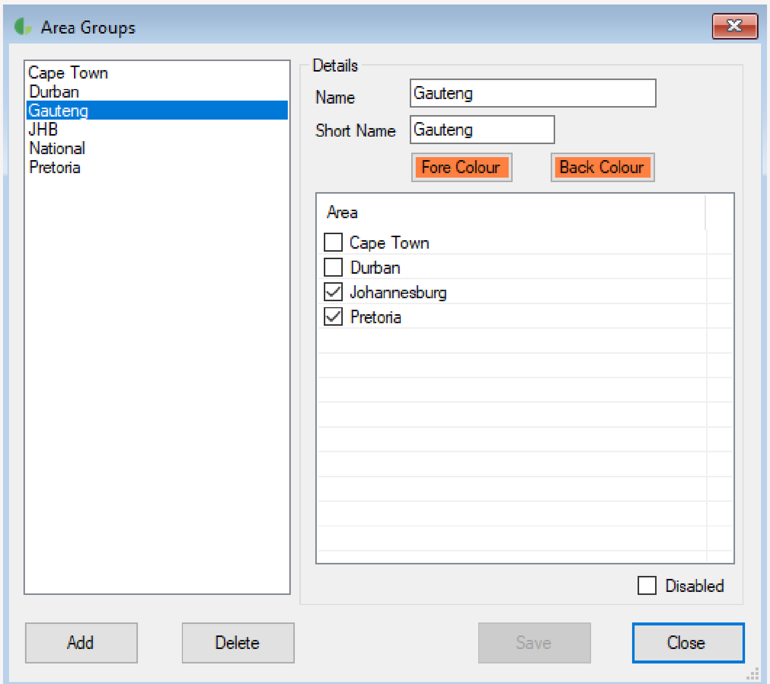
To make assigning Areas quicker and easier you can assign your own custom ‘favourite’ buttons (saved differently for each user) to the Areas that you apply most often. To set your most commonly-used buttons, select a day program you use regularly from the drop down list at the bottom, then either drag it onto a custom button, or right-click on the button and select ‘**Assign the ‘Area’ to this button**’. Now you can use your custom button. To do this, click your custom button from the list of buttons at the bottom which will select the assigned day program to use for your scheduling. To add more buttons, right-click a row in the window and select the number of rows to display. Each row has 15 buttons, allowing 45 buttons if all three rows are selected. Each button also has a keyboard ‘Hot Key’ assigned (1-45) respectively for even quicker selection of day programs.

To copy a selected employee’s schedule and apply it to another employee or group of employees, highlight the day by right-clicking on the Department, Number, Name and/or Surname area and then selecting ‘**Copy schedule**’. The employee’s highlight colour will now change from blue to green. Now select one or more employees by either holding down the control <Control> key (for selected individual employees) and/or the shift key (to select a range of employees) on the keyboard, right-click on their names and select ‘**Paste schedule**’. This will copy all of the single employees’ day schedules to the other selected employee/s for all of the dates shown at the time ‘**Weekly**’, ‘**Monthly**’ or ‘**Custom**’. Now click ‘**Save**’.

Area Groups

Area groups enable selected areas to be grouped together and assigned to users, limiting specific users to only work with those selected areas. Click ‘**Add**’ to add a new group, and then select the Areas which will be included in the group.

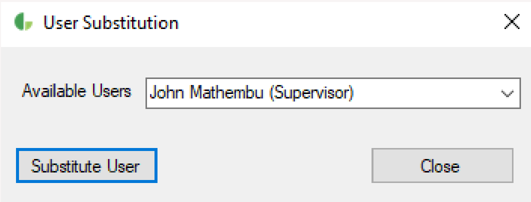
When setting up the user account (see the **User Profiles** section of the Configuration manual for more) the appropriate Area Group for each user can be assigned.



User Substitution

It is possible to setup a particular user to temporarily substitute as another specified user, in the case that the specified user is not available but their work in Jarrison needs to be done. The substituting user will assume all access privileges and viewing rights as the specified user.

To apply the substitution go to ‘**User**’ on the menu bar and then ‘**Substitution**’. Available options will then be presented.



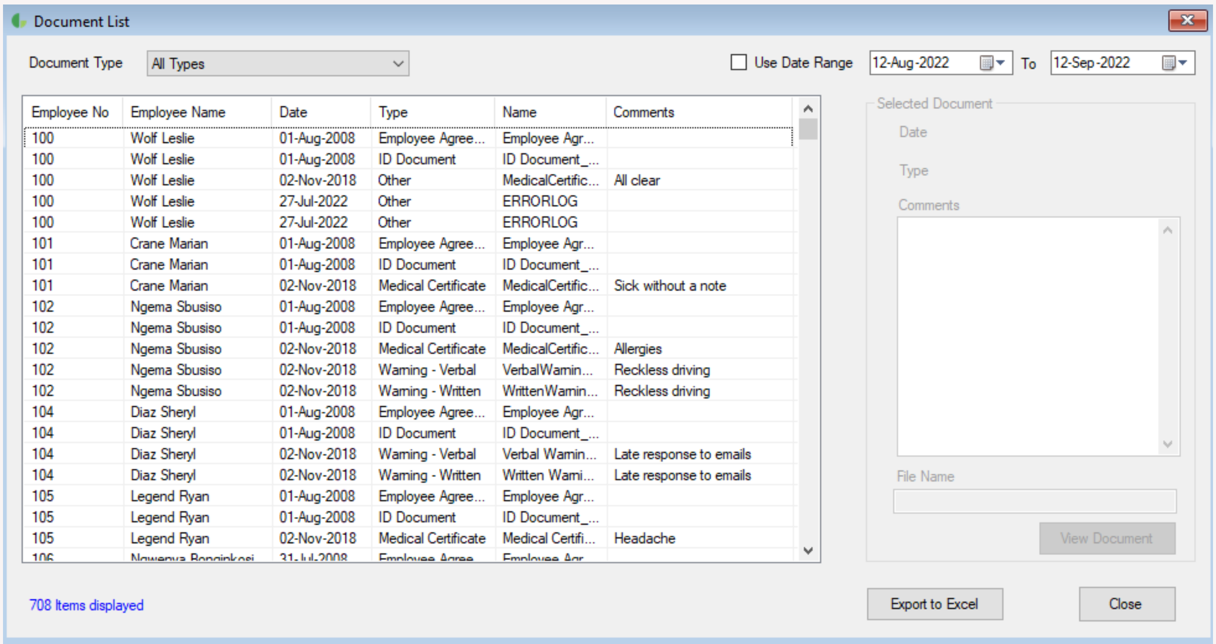
Setting up the substitute user is covered in the Configuration manual.

Password Change

Users may change their own passwords from the ‘**Users**’ menu option however it is limited to once a day. If any change has been made to a user profile, the ‘**Change Password**’ option will not be available that day.

Document List

A screen presenting all documents saved can be found under ‘**View**’, ‘**Documents**’. If a single employee is selected all documents for that employee will be listed, if all employees in the Employee List are selected then all their documents will be listed. The document listing can be filtered by date range and Document Type. The listing can be sent to Excel via the ‘**Export to Excel**’ button at the bottom.



Employee No	Employee Name	Date	Type	Name	Comments
100	Wolf Leslie	01-Aug-2008	Employee Agree...	Employee Agr...	
100	Wolf Leslie	01-Aug-2008	ID Document	ID Document_...	
100	Wolf Leslie	02-Nov-2018	Other	MedicalCertific...	All clear
100	Wolf Leslie	27-Jul-2022	Other	ERRORLOG	
100	Wolf Leslie	27-Jul-2022	Other	ERRORLOG	
101	Crane Marian	01-Aug-2008	Employee Agree...	Employee Agr...	
101	Crane Marian	01-Aug-2008	ID Document	ID Document_...	
101	Crane Marian	02-Nov-2018	Medical Certificate	MedicalCertific...	Sick without a note
102	Ngema Sbusiso	01-Aug-2008	Employee Agree...	Employee Agr...	
102	Ngema Sbusiso	01-Aug-2008	ID Document	ID Document_...	
102	Ngema Sbusiso	02-Nov-2018	Medical Certificate	MedicalCertific...	Allergies
102	Ngema Sbusiso	02-Nov-2018	Warning - Verbal	VerbalWarnin...	Reckless driving
102	Ngema Sbusiso	02-Nov-2018	Warning - Written	WrittenWarnin...	Reckless driving
104	Diaz Sheryl	01-Aug-2008	Employee Agree...	Employee Agr...	
104	Diaz Sheryl	01-Aug-2008	ID Document	ID Document_...	
104	Diaz Sheryl	02-Nov-2018	Warning - Verbal	Verbal Warnin...	Late response to emails
104	Diaz Sheryl	02-Nov-2018	Warning - Written	Written Warni...	Late response to emails
105	Legend Ryan	01-Aug-2008	Employee Agree...	Employee Agr...	
105	Legend Ryan	01-Aug-2008	ID Document	ID Document_...	
105	Legend Ryan	02-Nov-2018	Medical Certificate	Medical Certifi...	Headache

Jarrison Systems

Keyboard Shortcuts

Key	Action
<Control><s>	Will save data on any screen that has a save button
<F3>	Places cursor in employee list search field
<F4>	Next date (in **Daily Details**)
<F5>	Previous date (in **Daily Details**)
<F6>	Delete selected clocking (in **Daily Details**)
<F7>	Select all employees in the employee list
<F8>	Go to next employee in employee list
<F9>	Go to previous employee in employee list
<*>	Recalculate (in **Daily Details**)
<+>	Add an adjustment (in **Daily Details**)
<Space>	Add a clocking (in **Daily Details**)