OpenTimeClock Basics: Stuff you need and want to know

If you don't already have the site bookmarked for logging in it's here:
https://www.opentimeclock.com/free.html

OpenTimeClock is a hearty, efficient compromise between the draconian method of punching a time card and the more esoteric—and error prone—human memory. If your facility has wifi/internet access (and given our clientele they absolutely should) then you can:

• Log in and out
• Correct or edit employee times
• Add or remove employees
• Enter notes about call-ins, vacation days, etc
• Change passwords

Although fairly straightforward and very easy to learn (seriously, minutes, not hours or days) that doesn't necessarily mean it's wonderfully intuitive. So here are some screenshots and pointers to explain how to get around in it and do what you need to do every day.

For starters, understand you do not need to download or install anything— OpenTimeClock is web-based, so it works anywhere you have access to the internet. There is a caveat to this, however, which you'll see shortly. Let's begin with what matters most: logging in . . .

When you're at the correct web page (as shown above) you should see this:

For doing things like editing times or adding notes you do not clock-in, you want to 'Login'. Notice the two different buttons.

Only supervisors can 'login'.* Doing so gives you access to all the behind-the-scenes stuff.

Okay, not entirely true, but for our purposes it is.

Once you've **logged in (*not* clocked-in)** you should see this—the names may be different but the standard screen should be the same:

Along the left side of the screen you will see a long list of names—that's every employee Chayce has country-wide. Make it easy on yourself and select just your city, or as OTC calls it, 'Department'. How? **Use the All Departments** drop-down menu, just above he list of names.

Let's walk through a quick example.

Correcting A Missed Clock-In Or Clock-Out

I noticed one of the Phoenix (PHX) staff didn't clock out last night. The primary way to know this has happened is when one of your crew tries to Clock In or Clock Out and the reverse button shows up . . .

When everything is done correctly the Clock In button looks like this:	CLOCK IN
When everything is done correctly the Clock Out button looks like this:	CLOCK OUT
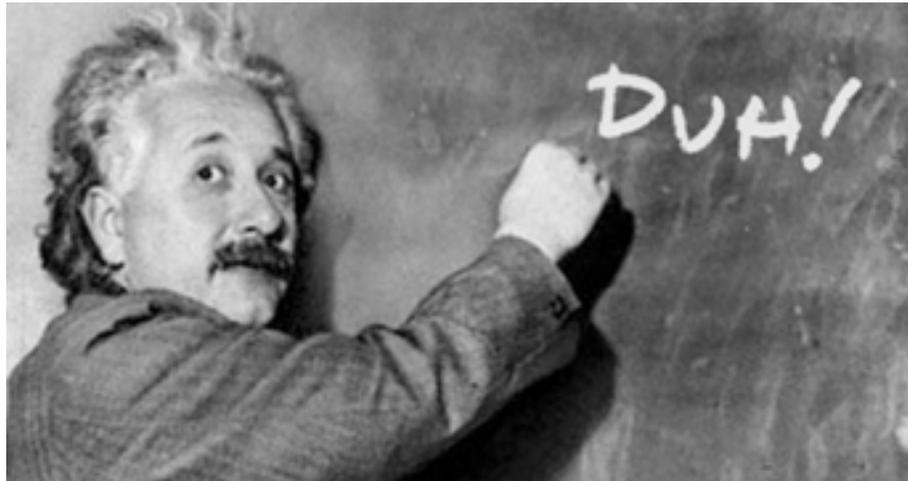
But it's momentarily confusing when someone tries to **clock in** for the start of their shift but the button says . . . .   CLOCK OUT

What now, Einstein?
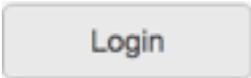
Pretty simple fix;   Login   and edit the time missed from the prior day.

Once logged in you are, by default, presented with the **Overview** tab:

Since you are going to edit someone's time, click on **Timecards** at the top:

You're still faced with that long list of employees, so click on **All Departments menu** and select your city code—for this example, it's PHX:

Now find the name you want from the much shorter list of your crew members—I want Nelson's timecard. Click on the name and you will see that person's time card.

The reasons for not clocking out are many:
• Employee was on a different shift
• Employee was working on weekend when laptop or tablet not available
• Wifi signal lost or access denied
• And of course, the tried and true, "I forgot."

Whatever the reason, you need to fix the missing time. Here's the timecard for this example:

Nelson Hernandez
total: 0h 0m

	Date	In	Out	Regular	OT1	OT2	Absences	Total	
Tue	01/31	06:00 am	missing	0h 0m	0h 0m	0h 0m		0h 0m	add edit del
Wed	02/01								add
Thu	02/02								add
Fri	02/03								add

	Date	In	Out
Tue	01/31	06:00 am	missing
Wed	02/01		
Thu	02/02		
Fri	02/03		

Notice on Jan. 31, under **Out**, it says missing. That's what needs to be filled in.

At the right of each Day line you see **add, edit, del**.
Add: lets you enter a new *In* time
Edit: allows entry of In and/or *Out* time
Del: Removes all times for that day

So to correct Nelson's I need to **edit**, so I can add his **Out** time from the prior day . . .

		total: 0h 0m
Total		
0h 0m		add edit del
		add
		add
		add

Clicking on **edit** results in the following window:

> **edit time card**   ×
>
> Date: 01/31/2017
>
> clock in: 06:00 AM 🕐   out: [   ] 🕐
>
> ☑ set clock out time as empty
>
> manager comment:
> [   ]
>
>   **Save**   Cancel

There's already a valid clock-in time so I need to **uncheck** the box that says *set clock out time as empty*. Then I can either manually enter the time or use the little clock icon at the right to enter it.

Once a valid time is entered, click **Save**

Be sure to double check the time once it returns to the Timecard screen.

> **Note the comment box below. Always** use this if you need to make a remark about why a person left early, was late, called off, etc.
>
> manager comment:
>
> Left early for dr appt

That's it! Pretty simple, really. Once you do it a couple times you'll have the hang of it.

The 'Tabs'
Best way to get a feel for OTC is to take a few minutes to poke around the interface. When you [Login] to it you see the **Overview** 'tab' first. As before, you really only need to see the information for your location, so use the *All Departments* pull-down menu to select your site. We'll look at one specific element of the Overview tab in a moment, but first let's be familiar with the 'tabs' we can use (some of them are only available after upgrade, and a large part of that functionality we don't need at this time):

- **Overview:** Let's you see who is clocked in, who's clocked out, where they clocked in and out at, and let's you add a comment
- **Timecards:** Allows for editing or adjustment of individual time entries
- **GPS:** works, sort of; not entirely useful for our purposes
- **Who Is In:** As advertised; let's you see who is currently on the clock
- **Absences:** If consistently used, let's you see who has been absent, what days, and for what reason. This section is covered in more detail below.
- **Setting:** Allows you to create a new employee profile, change passwords, and edit information as needed for a profile. This section, too, is covered below.

Pending and **Reports** don't provide any functionality for us, so they're unusable.

Overview Tab — *In IP* and *Out IP*
Why the image of a radar screen? Because an IP address, in the digital world, is a little like that—it let's you pin down a given device based on a unique digital signature. Every device 'connected' to a network has a unique numerical code as an identifier, a little like your home address or your fingerprint.

Each time someone clocks in or out the IP address of the location shows up in the Overview tab, as shown below:

Hours	In IP	Out IP
8h 43m	199.201.65.144	199.201.65.144
8h 0m	199.201.65.144	199.201.65.144
	199.201.65.144	
8h 0m		216.113.160.69

The idea here isn't to memorize IP addresses in your location, so much as to become aware of what IP addresses are legitimately applicable to your location. A little nebulous, I know, so look at the example below.

Until February, our Utah site wasn't using OpenTimeClock. The two screenshots below illustrate the IP address situation pretty clearly.

They began using OTC on 2/7, a Tuesday, so their times were **manually added** for Monday the 6th.

On Tuesday the 7th, they were manually logged in (added by manager) and then logged out on my laptop that afternoon—**note there is no IP address when someone is manually added, only when they clock in or out themselves.**

Nancy Ramirez	02/07, Tue	06:00 am	03:47 pm	9h 17m	(Manually clocked In)	216.113.160.68
Nancy Ramirez	02/08, Wed	06:00 am	03:08 pm	8h 38m	216.113.160.68	216.113.160.68
Nancy Ramirez	02/09, Thu	06:00 am	missing		216.113.160.68	

The next morning, Wednesday the 8th, they logged in on an iPad at the same desk **(same location)**.Note the IP addresses are identical to the prior day when they logged out on the laptop.

Same exact situation, different person:

Lorena Martinez	02/07, Tue	06:00 am	04:04 pm	9h 34m	(Manually added)	216.113.160.68
Lorena Martinez	02/08, Wed	06:00 am	03:20 pm	8h 50m	216.113.160.68	216.113.160.68
Lorena Martinez	02/09, Thu	06:00 am	missing		216.113.160.68	

Point here is they logged in and out on 2 different devices but at the same location, and the IP address didn't change. **If they had attempted to log in somewhere else, perhaps outside the building, then the IP address would be different**.

Why is this important?

Say you get a call early in the morning from one of your crew who say they will late because they have a doctor appointment at 8am. First of all, a planned doctor appointment should be something discussed in advance, not the morning of the appointment—an emergency room visit is different, but an appointment is something which should be scheduled for. But that's not our focus here . . . just sayin' . . .

If this person clocks in *off-site*, say from home or from their phone, the IP address will be very different than one at your site. This is a tip off something improper is going on. In this example, the device *might* be the same (like a phone) but the location is certainly different.

If someone is clocking in somewhere other than an authorized location, then it quickly becomes an issue of time clock fraud and must be handled accordingly.

Timecards Tab
This is the screen where you'll likely spend most of your time. The very first example above—*Correcting A Missed Clock-In Or Clock-Out*—walks you through what you need to know about editing or adding in and out times. If you want, this is also a good time to add a quick note when you edit someones time.

A word to the wise . . . don't let your timecards get like this:

	Date	In	Out	Regular
Mon	02/06	06:00 am	12:48 pm	
		09:01 pm	missing	6h 48m
Tue	02/07	06:00 am	12:47 pm	
		09:01 pm	missing	6h 47m
Wed	02/08	06:00 am	09:01 pm	8h 0m
Thu	02/09			

Chances are pretty good you'll be notified before it gets this bad.

Absences Tab

This screen is where you need to document when an employee misses a shift. It may be scheduled in advance (vacation), but most often will be a call-in due to illness or something else.
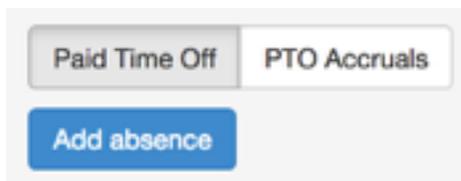
It is important to take the few moments necessary to document these occurrences because **it will** make your job easier in the future.

The results table is self-explanatory, so we won't waste time defining it here.

Near the top of the screen are three 'buttons':

Paid Time Off	PTO Accruals
Add absence	

Paid Time Off (PTO)

Displays a list of all entries made for, well, paid time off. If an employee has exceeded their allowable personal days (currently 5 per year) then:
1) there may be a larger problem to address
2) a note must be made when documenting the absence, including the word 'unpaid'

While there is no way to filter the entries for just one employee the entries *are* in alphabetical order, so at a glance you can see what a specific person's activity has been over time.

PTO Accruals

This section doesn't mesh well with the way Chayce handles vacation time; for specifics on that refer to the Employee Handbook. But for Personal days these need to be set for each employee; unfortunately there is no way to apply the 'rule' to a group—but it is simple to set up:

Select the employee from the left hand list and you'll be presented with their accrual totals . . .

Absence Type	Anniversary	Accrual rule	Accrued hours	Used hours	Carryover	Balance	Edit
Administrative			0	0	0	0	edit
Holiday			0	0	0	0	edit
Other			0	0	0	0	edit
Personal			0	0	0	0	edit
Sick			0	0	0	0	edit
Vacation			0	0	0	0	edit

Again, the only one we really can track, in terms of *accruals*, is Personal. So click on the edit link at the right on the Personal line. You'll see the following window—set up each employee to match this window .. .

Reason: Personal · · ·

Award frequency: Yearly allotment

Hours per year: 40.00

Anniversary: January 1

Carryover hours: 0.00 beginning balance for this benefit year

Save change   Cancel

Once set up the total personal days will show every time you select Personal as a reason for Absence.

Remember, we make no distinction between a "personal" day and a "sick" day in terms of how we document it. If you want to be tongue-in-cheek you might even say "mental health day", but however you slice it it's still a day taken for some 'personal' reason.
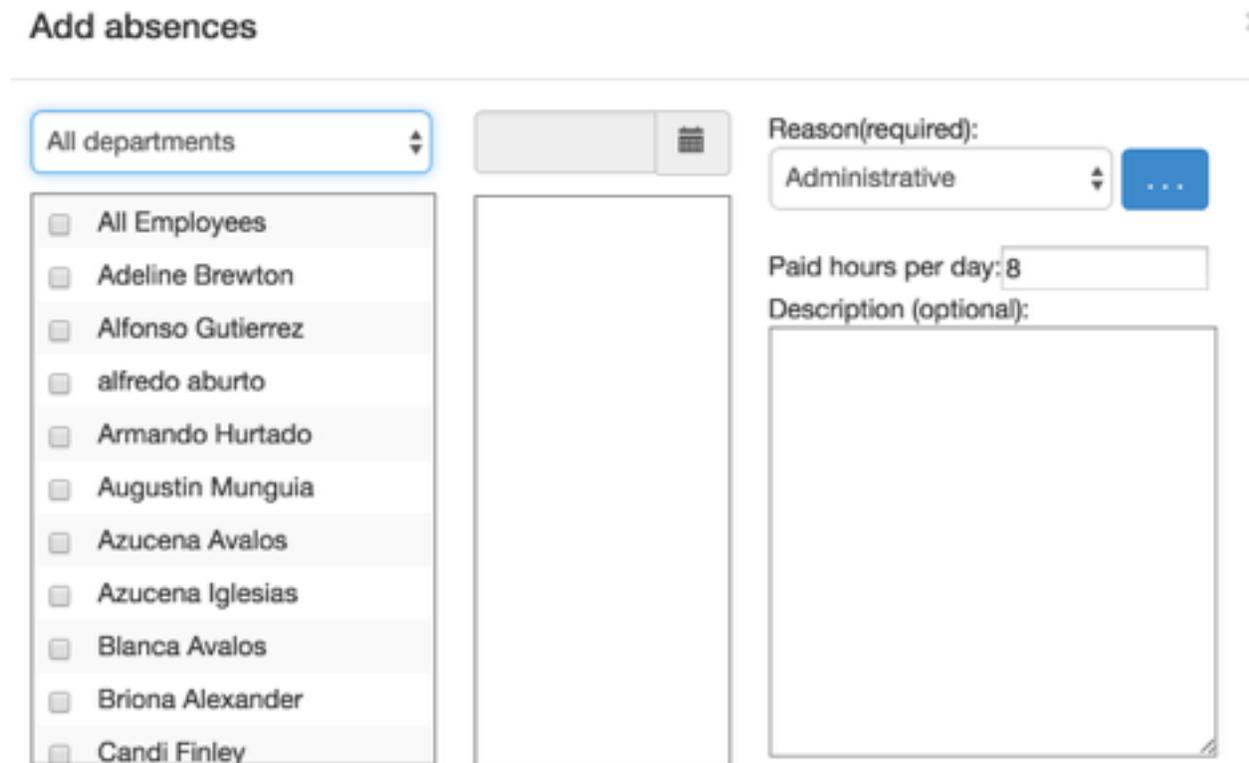
Holidays are not necessary to document or track since the entire company observes the same days. See the Employee Handbook for specifics.

Add Absence
This is the workhorse for the Absence tab. Every time:
• Someone calls in
• Is a no-call no-show
• Takes a personal day
• Takes vacation time
 . . . it must be added here.

Click the **Add absence** button and you get this window:

Add absences

All departments	📅	Reason(required):
		Administrative ...

☐ All Employees
☐ Adeline Brewton
☐ Alfonso Gutierrez
☐ alfredo aburto
☐ Armando Hurtado
☐ Augustin Munguia
☐ Azucena Avalos
☐ Azucena Iglesias
☐ Blanca Avalos
☐ Briona Alexander
☐ Candi Finley

Paid hours per day: 8
Description (optional):

👍 Do yourself a solid, use the *All Departments* pull-down menu to filter for your site. Use it often!

• From the *All Departments* menu, select your site and your staff names appear. You can select multiple names if necessary.
• The middle column lets you select the date (or dates, as may well be the case for vacations)
• The last column lets you select a Reason and add a comment if you wish

Check out the example below:

PRN ⇕	02/09/2017 📅	Reason(required):

		Personal ⇕ [...]

- ☐ All Employees
- ☐ Dolores Martinez
- ☐ Gloria Villagomez
- ☑ Israel Abalos
- ☐ Lorena Vargas
- ☐ Luis Villagomez
- ☐ Manuel Sanchez
- ☐ Rodolofo Ortiz

02/09/2017 ✗

Paid hours per day: 8

Description (optional):

Called in sick

Note the following:
- You can delete the date(s) if you pick the wrong one (use the red **X**)
- It's an outstanding idea to provide a comment regarding the absence for future reference

Administrative
✓ Personal
Vacation

Selecting **Personal** from the *Reason* menu will deduct one personal day from the person's accrual total.

The **Administrative** option will typically only be used in instances of disciplinary action or management approved leave.

The above example results in the entry shown below when you go back to the Absences tab:

Israel Abalos	Personal	Called in sick	02/09	8.00

Go back to he **PTO Accruals** button and you can see the system automatically deducted 8 hours of paid time from the employees allotted 40 (5 days per year)—it now reads 32 hours available (4 days):

End date: 02/09/2017 📅   Balance for [Israel Abalos] 40 - 8 + 0 = 32 hours

Absence Type	Anniversary	Accrual rule	Accrued hours	Used hours	Carryover	Balance
Administrative			0	0	0	0
Personal	01/01/2017	40 hours annually	40	8	0	32
Vacation			0	0	0	0

PTO and vacation days need to be documented to ensure all employees are being tracked fairly. Taking those couple of minutes to make a few clicks and enter the information is a small price to pay for assuring fairness and overall consistency.

Settings Tab

Think of *Settings* as your **enter-a-new-employee** screen. This is where you set up a new staff member.

Where to start? Easy . . . click **Add employee**

- **Full Name:** guess what goes here?
- **Username:** leave the little box checked and it will generate a unique number
- **Password:** use something simple—they will need to change it. We often use the first three letters of the first name, and first three of the last name, so *Kendra Bellows* would be *kenbel*—remember, they'll change it the first time they log in.
- **Employee Number:** leave blank
- **Email:** provide it here if they have one; not mandatory
- **Rate** boxes: zero them out, we don't use OTC to compute payroll
- **Weekly Overtime:** leave at defaults
- **Daily Overtime:** leave at defaults
- **Daily Overtime2:** leave at defaults
- **Time Zone:** Set to the appropriate time zone as shown below

US/Central ←
US/East–Indiana
US/Eastern ←
US/Hawaii
US/Indiana–Starke
US/Michigan
US/Mountain ←
US/Pacific ←

- **Remember Password:** set to *Disabled*
- **Department:** you should know this by now
- **Role:** set to Employee
- **Early time limit:** leave the box checked and time set to 6:00am
- **Late time limit:** unless your site requires a late shift, leave unchecked. **If it does require a late shift** then check the box and enter the appropriate time.
- Leave the following boxes unchecked as shown:

☐ Allow to add time cards manually.

☐ Allow to request absence.

☐ Allow to see who is in.

☐ Allow overnight shift.

Changing Passwords
This can be performed in two places: when you initially set up the employee's account in OTC or upon their first clock-in/login. It can also be changed any time an employee wants to change it if they login instead of clocking in,

Option 1: During Initial Account Set Up
When you first begin entering the individual's name you can see the **Password** field under Username:

Full Name	
Username	auto create
Password	

Have the person enter their desired password in the proper field. That's it.

Option 2: During Initial Clock-in
The first time a new employee goes to clock in, if they hit **Login** instead of Clock In, they will see this:

Overview	Time Cards	GPS	Absences	PTO accrual	Setting	**Exit**	

02/01/2017   📅   02/28/2017   📅
there is no record in the selected date range.

No dates or times because they haven't (in all likelihood) clocked in before. If they click **Setting**—at the top of the screen— then they will see this:

Setting

Username	551051
Change Password	☐
My current password	
New password	
Confirm new password	

Save   Cancel

For some inane reason—which I won't belabor here—there is a box that must be checked in order to change the password.

Change Password ☐

The rest is self-explanatory.

Summary

✓ Do a quick check of your staff Timecards each day. Doing so will help you stay on top of missing or incorrect clock in or clock out times.

✓ Monitor the **InIP** and **OutIP** entries on the Overview tab. Compare them against others on your crew.

✓ Stay on top of Absences.

✓ Use the Comment boxes liberally but responsibly

✓ **Only supervisors are to be editing timecards or documenting absences!**