

TimeSheet

FirstStep



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Introduction

You're probably used to accumulating and then calculating the times for your payroll in the same time-consuming and error-prone way you've been doing it for years, but you've finally decided it's taking up too much of your time, and you could do without the stress.

We created our Time and Attendance programs for people like you, to reduce the stress of employee payroll data collection - to make it easier and quicker so you've got more time to do all those other things you'd rather be doing.

TimeSheet FirstStep is our entry level product, intended for smaller companies, branch offices, and trial installations at larger companies.

FirstStep provides these advantages:

- Allows up to 16 employees.
- No need to set or define shifts.
- Easily handles multiple work periods per day.
- Allows work periods to extend over midnight.
- Normal time and three overtime pay categories.
- Automatic rounding of clock in and clock out times.
- Scheduled or manual collection of clocking data.
- Reports of adjusted and unadjusted time with totals.

You can upgrade from FirstStep to any of our other Time and Attendance solutions, including **ZipNet TimeSheet**, **TimeSheet Express**, and our **ZipNet Terminal**, at any time with full credit for your FirstStep purchase! FirstStep files are completely upward compatible with TimeSheet Express.

TimeSheet FirstStep and ASP ClickClock are designed for Windows 95 or later operating systems.

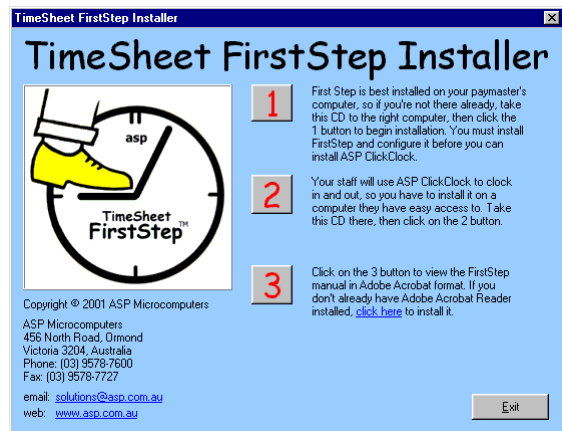
Installing FirstStep and ClickClock

TimeSheet FirstStep and ASP ClickClock are normally supplied on a CD-ROM. The installation program should start automatically when you insert the CD into your CD-ROM drive. If it doesn't, select **RUN** from the Windows Start menu, then type **x:\setup** (where **x:** is your CD-ROM drive letter). Then simply follow the on-screen instructions, shown on the right.

First, press the **1** button to install **TimeSheet FirstStep**, which is best installed on the computer of the person who looks after your payroll. Next, you'll need to set up FirstStep, so go read the section starting with *The Main Screen* on page 6, set up FirstStep, and then come back here.

Next, press the **2** button to install **ASP ClickClock**, either on the same computer, or on the computer you want staff to clock in and out from. Go read the section on *ASP ClickClock* on page 13. Note that ClickClock automatically installs itself into the startup group, so that it runs whenever the computer it is installed on is running.

The **3** button allows you to view the FirstStep manual, provided you have the free Adobe Acrobat Reader installed on your computer. If you don't, the setup screen has a link you can click to install it.

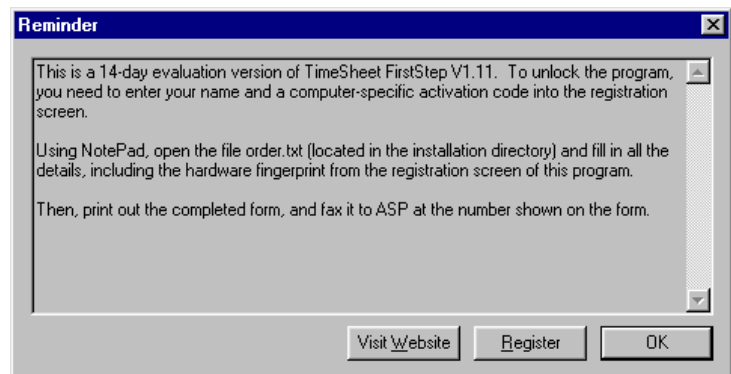


Unlocking FirstStep and ClickClock

So you can evaluate TimeSheet FirstStep and ASP ClickClock to ensure that they meet your needs before purchase, the programs are supplied in a form that allows them to run for 14 days from the date of installation before they must be registered. Except for the 14 day limit, the evaluation versions are fully functional.

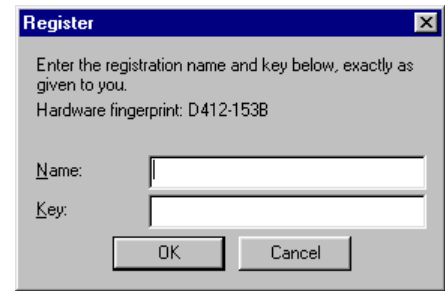
Until they are registered, the programs will display a **Reminder Screen**, as shown on the right, each time they are run.

Press the **OK** button to evaluate the program, or the **Register** button to enter your registration details and unlock the program. Pressing the **Visit Website** button takes you to ASP's web



site, if your system is connected to the internet and set up correctly.

When you press the Register button, the screen on the right is displayed. Note that a **Hardware Fingerprint code** is displayed – this code is unique to the particular computer the program is running on, and the program itself.



To register TimeSheet FirstStep and ASP ClickClock, you need to install them both (possibly on different computers), then contact ASP, and using the Hardware Fingerprint codes and the name you want the programs to be registered under, ASP will generate Activation Keys for you that will register and unlock the programs. The Registered Name and Activation Key are then entered into this screen for each of the programs. Once a program is registered, you'll never see the reminder screen again.



Note that Activation Keys are specific to the program, the computer the program is running on, and the name the program is registered under. You cannot use the activation key on any other computer, or for any other program.

Please also note that it is not possible to extend the evaluation period beyond 14 days. You could, however, install the program on another computer and continue running the program for a further 14 days on that computer.

Getting Started

The easiest way to get you up and running with FirstStep is to take you through the program, step by step. If you haven't already, you should install TimeSheet FirstStep now.

Before you do anything else, you'll need to get to know the layout of FirstStep's main screen. On the next page, we give a brief overview of the screen that you will see every time you open FirstStep, and we follow that with a step by step guide that will get you up and running with FirstStep and ClickClock in no time at all.

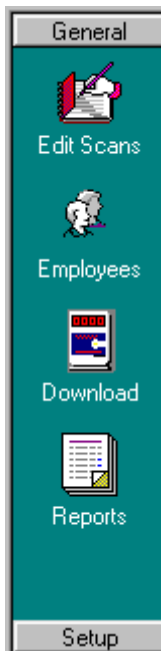
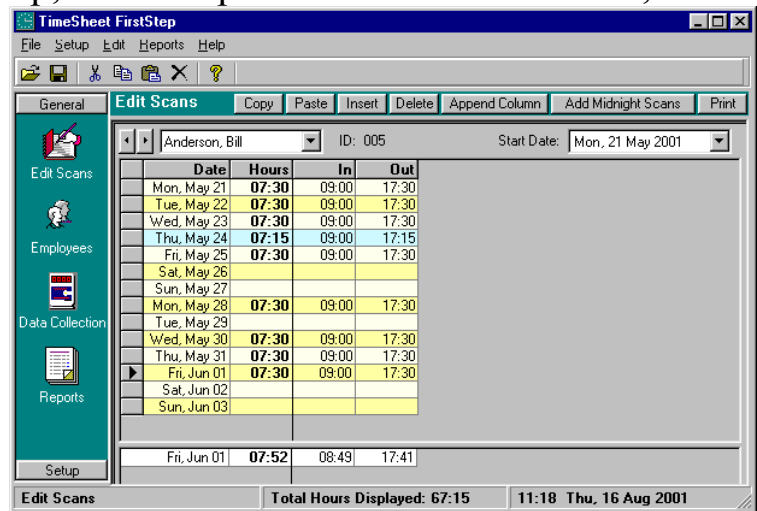
After that, the remainder of the manual is mainly a reference guide that explains all sections of the programs, followed by a section containing answers to some commonly asked questions, and we finish the manual with a glossary and copyright, licence and warranty information.

The Main Screen

Every time you run FirstStep, it starts up in the **Edit Scans** screen, with the first employee in your database displayed.

On the left side of this screen, you'll see a set of icons that take you to the most often used parts of the program.

This section is comprised of two parts – **General** (as shown on the left below) and



Setup (as shown on the right below). To change between the two sections, click on the **General** heading or the **Setup** heading.

The **General** section (shown on the left) allows access to the **Edit Scans** screen (the screen that's always displayed when you run FirstStep), and the **Employees**, **Download** and **Reports** screens.

The **Setup** section (shown on the right) allows access to all the configuration options available in FirstStep.

All the sections of FirstStep are described later in this manual - just click on an icon to open that part of FirstStep.

The **File**, **Setup**, **Edit**, **Reports** and **Help** menus along the top of the screen can also be used to access the various sections of FirstStep, while the toolbar icons underneath the menus provide quick access to (from left to right) the **File**



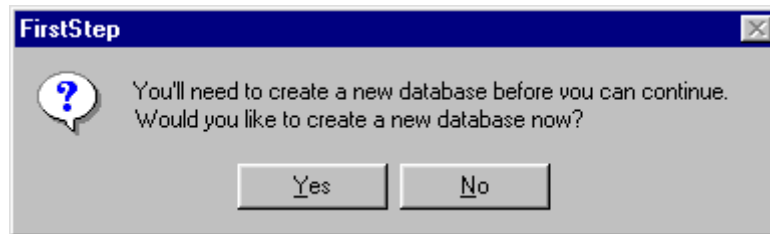
Open and **File Save** operations, the **Cut** , **Copy** , **Paste** , and **Delete** functions, and the FirstStep **Help** file .



Now, we can move on to getting you up and running with FirstStep.

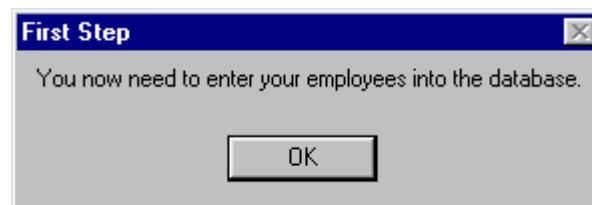
Creating a new database

The first time you run FirstStep, you won't have a database, so you'll see this message, explaining that you can't use FirstStep until you create a database.



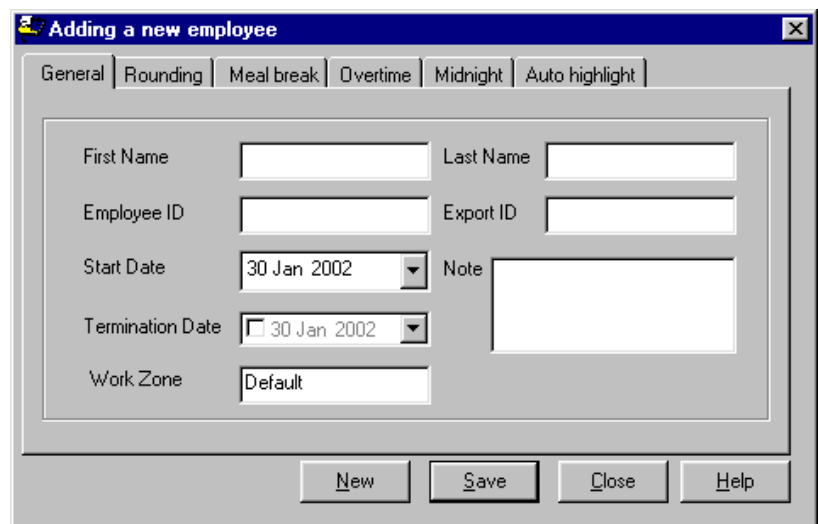
If you press the **Yes** key, a new database will be created. A FirstStep database always needs to contain at least one employee, or it will not function. For this reason, when you create a new database, an employee called **An Employee**, with an Employee ID of **000**, is added. You can delete this extra employee anytime after you've entered at least one of your own employees, but you can never have less than one employee, and remember that FirstStep has a limit of 16 employees. If you have more than 16 employees, you should upgrade to TimeSheet Express, or one of ASP's other Time and Attendance systems.

Once you've told FirstStep to create a new database, you'll receive this reminder:



After you press the **OK** button, the **Edit Employees** screen will be open, ready for you to enter the details for your employees. There are two ways to do this – by entering the details manually using the keyboard, or by importing the data from a suitable formatted text file.

To manually enter an employee from the keyboard, right click in the grey part of the Employees screen, then select **Add New** from the menu that pops up. The screen on the right will be displayed:

A window titled "Adding a new employee" with a close button. It has several tabs: "General", "Rounding", "Meal break", "Overtime", "Midnight", and "Auto highlight". The "General" tab is selected. The form contains the following fields:

- First Name:
- Last Name:
- Employee ID:
- Export ID:
- Start Date:
- Note:
- Termination Date:
- Work Zone:

At the bottom, there are four buttons: "New", "Save", "Close", and "Help".

Enter the employee's **First Name** and **Last Name**, then enter a unique identifying number for the employee into the **Employee ID** field. If you're using ClickClock to clock in and out, the **Employee ID** can be anything you like, except that it must be unique – that is, you cannot use the same number for more than one employee. If you're using barcoded cards, or iButton tags, the **Employee ID** will be the barcode or tag number for this employee.

The **Export ID** field need only be used if you require a different identifying number to be exported for employees – this might be useful, for example, if you are using barcoded cards with different numbers to that required by your payroll program. If this field is left blank, the **Employee ID** will be used instead. In most circumstances, this field should be left blank.

The **Start Date** is the date that the employee started work for the company, or the date that they were entered into FirstStep. This defaults to the current date when a new employee is added, but can be changed by clicking on the grey down arrow to the right of the date, which brings up a pop up calendar (See the glossary for more information on the pop up calendar). Note that clock in and out data for an employee will not be accepted by the program for dates before the **Start Date** set here.

The **Termination Date** is the date that this employee ceased employment with the company. Click on the grey down arrow to the right of the date to bring up a pop up calendar, as described above. Setting a date in this field puts a tick in the box in the left of the field, which indicates that the employee is no longer employed after the date set. To re-enable the employee, click in the box in the left of the field to remove the tick. You can set the Termination Date field to any date, provided the employee has not already clocked in or out after the date set here. Once this field is set, scans will not be accepted after the date set here.

The **Work Zone** field is optional, and is used to indicate the area of the company that the employee works in, or is to be costed in. You can enter any text here, and the default for newly added employees is Default. FirstStep allows reports to be restricted to particular **Work Zones**, which is the primary use of this field.

The **Note** field allows you to add a small amount of free format text to an employee's entry. This field does not appear on any FirstStep reports.

Once you've entered all the information for the employee, press the **Save** button, then the **Close** button if you're finished adding employees. If you want to add another employee, click on the **New** button instead, and enter the information for the next employee.

For the time being, you can ignore the other tabs (or sections) on the **Adding a new employee** screen – see *Options* on page 31 for more details on these options. Note that settings on these tabs are for the particular employee only, and override the options set on the **Options** screen.



If you have (or can create) a text file containing a list of your employees and their ID numbers, FirstStep can import this list instead of making you type everything in manually as described above - see *Importing Employee Details from a Text File* on page 37 for more details.

Setting the Main Program Options

Next, you need to set up the main program options. Select **Options** from the **Setup** menu, which will bring up a screen with six tabs (or sections). See page 31 for more detailed information on this and the other main program options.



Note that these are all “global” settings (that is, they affect all employees), but you can set options for individual employees from the **Edit Employee** screen.

Clock In and Clock Out Time Rounding

The next most important option is **Rounding**, which is designed to save you time and effort by automatically rounding your employee clock in and out times to the settings you’ve specified. Rounding is set from the **Rounding** tab on the **Options** screen – see the screen fragment on the right.

There are two rounding options – one controls the rounding for all clock in

scans, and the other controls the rounding for all clock out scans.

Rounding can be set to round up to the next preset interval, round down to the previous preset interval, or round to the nearest preset interval. Intervals of 5, 6, 10, 15, 30 and 60 minutes are available.

Most employees tend to clock in a little before their official starting time, and clock out a bit after their official finishing time. As an example, if your staff work from 09:00 to 17:30, you may find that most of them clock in between (say) 08:45 and 09:00, and most of them clock out between 17:30 and 17:45.

Use Rounding When Clocking In
Round In
Round In times: Round up 30 minutes

Use Rounding When Clocking Out
Round Out
Round Out times: Round down 15 minutes

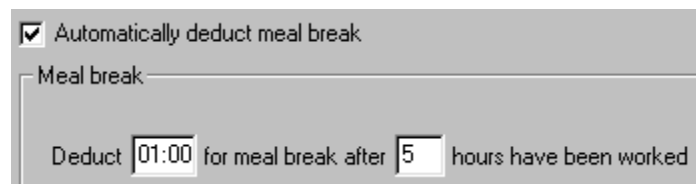
If you set the **Clock In Rounding** to round up to the next 15 minutes, and the **Clock Out Rounding** to round down to the previous 15 minutes, then everyone who clocked in between 08:46 and 09:00 would have their clock in time automatically rounded up to 09:00, and everyone who clocked out between 17:30 and 17:45 would have their clock out time automatically rounded back to 17:30. If you have more than a very few employees, this would save you considerable time by not needing to manually edit their times to the right values.

Rounding can also help in other ways – if you pay your employees in particular increments (for example, 15 minute increments, or tenth of an hour (ie 6 minutes) increments), you could set FirstStep to round to those values.

Meal Breaks

Next, you need to configure FirstStep to handle meal breaks. There are three possibilities - if you want your employees to clock in and out for their meal breaks, or if you pay your employees for their meal breaks, you don't have to do anything special. The third possibility is that your employees aren't paid for their meal breaks, and you don't want them to clock in and out for them.

To configure FirstStep to do this, you need to go to the **Meal Break** tab and check the box that says



The screenshot shows a configuration window with a checked checkbox labeled "Automatically deduct meal break". Below it is a section titled "Meal break" containing a text field with the value "01:00" and a number field with the value "5". The text reads: "Deduct 01:00 for meal break after 5 hours have been worked".

Automatically deduct

meal break. Then, set the length of the meal break (in hours and minutes) in the box after the word **Deduct**, and set the number of hours that have to be worked before a meal break is given.

The way that automatic meal breaks work with FirstStep is that after the specified number of hours are worked, the length of the meal break is subtracted from the total of hours worked for that day. A good “rule of thumb” is that the number of hours that must be worked should be set to the number of hours between the start of work and the meal break, plus the length of the meal break.

For example, if your staff work from 9:00 to 17:30, and have a one hour meal break at 12:30, you could set the number of hours that must be worked to 5 (that is, five hours). That way, unless your staff come back from their meal break, the meal break won't be subtracted from their hours. This would also work if staff sometimes worked half days, because unless they worked more than the number of hours set here, no meal break would be automatically deducted. Note that only whole numbers of hours can be entered here.

Overtime

FirstStep has three overtime categories, which are set to begin *after a specified number of hours have been worked*. For example, **Overtime1** might be set to start after 8 hours have been worked, **Overtime2** after 10 hours, and **Overtime3** after 12 hours, as shown in the screen fragment above. Note that the numbers entered here are not times (ie **08:00** is not **8am**), they are the number of hours that must be worked before the overtime starts accumulating.

| | Overtime Tag | Overtime threshold |
|------------|--------------|--------------------|
| Category 1 | Overtime1 | 08:00 hh:nn |
| Category 2 | Overtime2 | 10:00 hh:nn |
| Category 3 | Overtime3 | 12:00 hh:nn |

If the **Same settings for every day** option is selected, the one set of overtime thresholds are used for every day of the week. If this option is not selected, you can set different overtime thresholds for different days of the week.

Midnight

FirstStep always works with single days – a work period is not allowed to continue over midnight. If an employee does work over midnight, FirstStep handles the situation by “pretending” that the employee finished work at the end of one day (ie at **24:00**), then started work again immediately at the start of the next day (ie at **00:00**).

By setting this option, FirstStep can automatically add a 24:00 scan to the end of a day and a 00:00 scan to the start of the next day, when an employee’s final scan for the day is within the specified number of hours before midnight.

Display Period

Click on the **Display Period** tab to open this section. The Display Period should be set to correspond to your pay period – most likely, it will be 7 or 14 days, but you can set it to any period you require.

Auto Highlight

One of FirstStep’s handiest options is provided on the **Auto Highlight** tab. FirstStep can be set to automatically highlight days on the Edit Scans screen where the total number of hours worked for the day are less than or more than a specified amount. This makes it easier to see which times may need to be adjusted. If you want to use this facility, check the box marked **Auto Highlight**, then enter times in hours and minutes into the less than and more than boxes.

| |
|---|
| <input type="checkbox"/> Auto highlight |
| Highlight options |
| When daily total less than <input type="text"/> or more than <input type="text"/> hours |

Once you’ve finished setting the options, press the **Save** button, then the **Close** button.

Data Collection

Finally, you need to let FirstStep know where the clock in and clock out scan data is coming from, and how often to collect it.

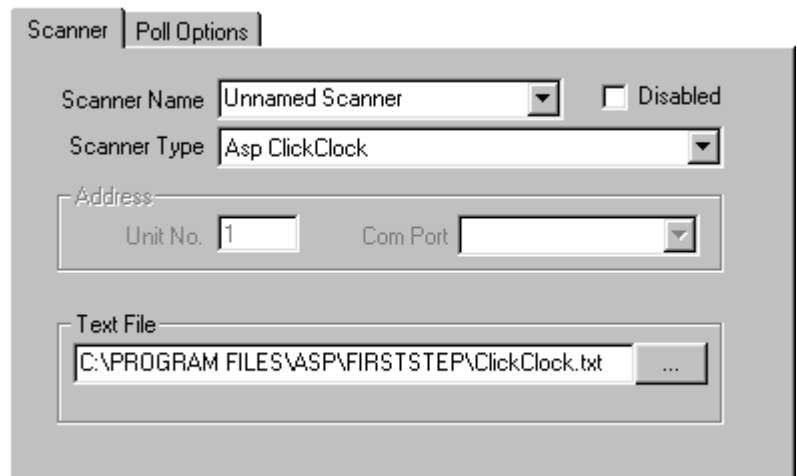
To do this, select **Data Collection** from the **Setup** menu, to bring up the screen shown on the right.

You'll probably be using the ASP ClickClock program to collect your employee clock-ins and clock-outs, so set the **Scanner Type**

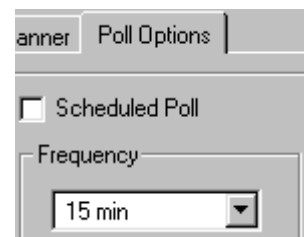
to **ASP ClickClock**, and set the **Text File** to store the collected data on the computer that FirstStep is installed on, and in the folder it is installed in, as shown above.

If you're using ASP ClickClock, select the **Poll Options** tab, make sure the **Scheduled Poll** checkbox is not ticked, and set the **Frequency** to 15 minutes, as shown in the screen fragment on the right. Otherwise, see the **Data Collection and Downloading** section of this manual on page 36 for more options.

Click on the **Save** button, then the **Close** button, and you're now almost ready to start using FirstStep.



The screenshot shows the 'Poll Options' tab of a configuration window. It includes a 'Scanner Name' dropdown menu set to 'Unnamed Scanner', a 'Disabled' checkbox, a 'Scanner Type' dropdown menu set to 'Asp ClickClock', an 'Address' section with 'Unit No.' set to '1' and a 'Com Port' dropdown menu, and a 'Text File' text box containing the path 'C:\PROGRAM FILES\ASP\FIRSTSTEP\ClickClock.txt' with a browse button.



The screenshot shows a close-up of the 'Poll Options' tab. It features a 'Scheduled Poll' checkbox which is unchecked, and a 'Frequency' dropdown menu set to '15 min'.

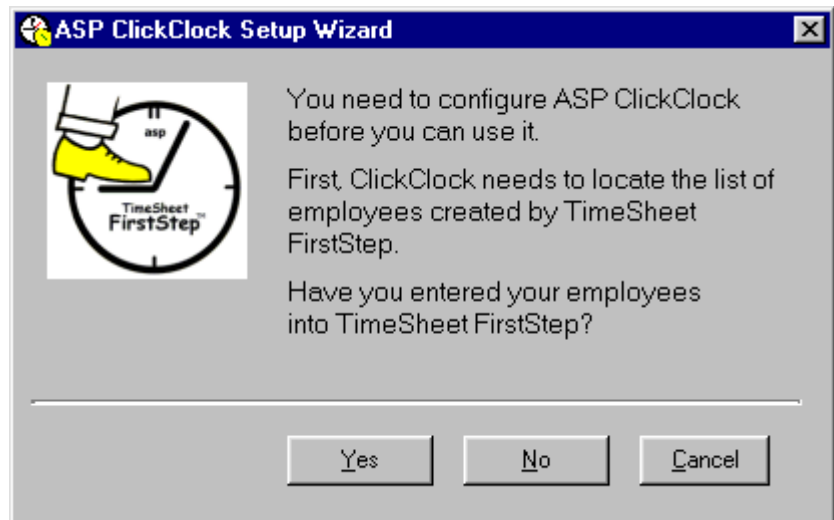
ASP ClickClock

ASP ClickClock allows you to use any old Windows 95 or later computer as a staff time clock for TimeSheet FirstStep.

Employees simply find their name and double click on it to clock in or out – it's that simple.

Before you can use ClickClock, you have to set it up, and the Setup Wizard leads you through that process. ClickClock needs to know who your employees are, so their names can be displayed, so if you haven't installed and set up TimeSheet FirstStep yet, go do it now, then come back here and start again.

Once your employees are entered into FirstStep, ClickClock needs to be able to access the list of employees. There are several ways FirstStep and ClickClock can be installed:



- FirstStep and ClickClock are installed and used on the same computer. This may sometimes be a little inconvenient, because your employees may need to clock in or out while the computer is in use.
- FirstStep and ClickClock are installed on different computers, and the computers are both connected to a network and are able to communicate via a shared drive. This is probably the ideal setup.
- FirstStep and ClickClock are installed on different computers, but the computers are not connected in any way. In this case, data is transferred manually via a floppy disk.

The Setup Wizard next asks you whether the computer you've installed ClickClock on is able to directly access the drive and folder that FirstStep is installed on. You'd answer **Yes** here in either of the first two cases above, or **No** if you were intending to transfer data via a floppy disk.

If you answer **Yes**, you are then asked to set the filename and location of the **Employee.ini** file created by FirstStep, which is stored in the folder that FirstStep is installed in (**c:\Program Files\Asp\FirstStep**).

Once you've set the location of this file, you are asked whether you want to store the clock in/clock out data collected by ClickClock into the same location. Usually, the answer here would be yes.

If you answer **No**, you're telling ClickClock that this computer is a "stand alone" system, not connected to the computer running FirstStep at all, and that you want to use a floppy disk to transfer the employee list to ClickClock when needed, and to carry the clock in/clock out data from ClickClock to FirstStep. ClickClock will now ask you to go to the computer where FirstStep is installed, run FirstStep, insert a blank floppy disk, then go to the **File** menu and select **Copy Employee File To Floppy Disk**. When that's done, bring the disk back to the ClickClock computer, put in into the floppy drive, then press the **OK** button.

Whether you answered **Yes** or **No**, the setup wizard now asks you to let it know where the **Employee.ini** file is, which will either be on the floppy disk you just created, or on the folder and drive that FirstStep was installed into.

You'll probably want to transfer the data from ClickClock to FirstStep in the same way that you transferred the Employee.ini file – either ClickClock will have direct access to the folder and drive that FirstStep was installed into, or you'll be transferring the data as needed via a floppy disk. The setup wizard asks you to confirm this – if you answer **No**, you will have to manually set up ClickClock by selecting **Setup** from the **File** menu.

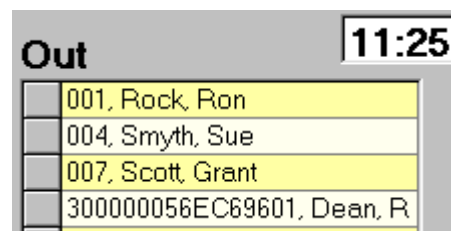
ClickClock is now ready to use!

Manually Configuring ASP ClickClock

The first time you run ASP ClickClock, the Setup Wizard guides you through configuration, as described above. If you ever need to change the settings, select **Setup** from the **File** menu. Each of the setup options is described below.

Display Employee IDs

If the **Display Employee IDs** checkbox is ticked, the employee ID numbers from FirstStep will be displayed before each employee name, as shown on the right. If the checkbox is not ticked, only the names will be displayed.



| Out | | 11:25 |
|--------------------|--------------|-------|
| 001, | Rock, Ron | |
| 004, | Smyth, Sue | |
| 007, | Scott, Grant | |
| 3000000056EC69601, | Dean, R. | |

Names are always sorted by employee ID number, or by surname if employee ID numbers are not being displayed. Note that if you have long employee ID numbers, you may lose some of the name, as you can see with the fourth name in the screen fragment above.

Text Output File Location

This item sets the file where the collected clocking information will be stored. If the computer you're running ClickClock on is connected to a network with the computer that FirstStep is on, you should store the data onto the drive and folder that FirstStep is installed on.

Otherwise, you should set it to the folder that ClickClock is installed in (**c:\Program Files\Asp\FirstStep**) and use the **Copy Output File To Floppy Disk** function in the **File** menu to copy the collected data to floppy disk or another location as required.

Employees File Location

ClickClock needs a list of employees to be able to work. FirstStep creates or updates a file called **Employee.ini** each time that an employee is added or deleted, or any employee details are changed. This file is stored in the folder that FirstStep is installed into, so if the ClickClock computer has access to this folder via a network, you should set this item to that location.

Otherwise, you should set it to the folder that ClickClock is installed in (by default, this will be **c:\Program Files\Asp\FirstStep**) and use the **Import Employees File** function in the **File** menu to copy the file from floppy disk or another location as required.

Password

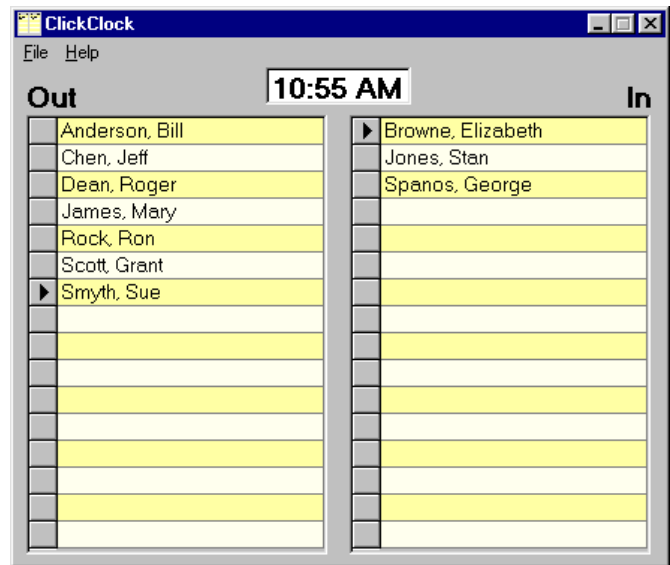
ClickClock allows you to set a password that is required before you can move the collected data onto a floppy disk. Once you set a password, every time you use the **Copy Output File To Floppy Disk** function, you will need to enter the password.

Using ASP ClickClock

ASP ClickClock includes itself in the Startup folder of the computer it is installed on, so that it runs whenever the computer is used.

When ClickClock is running, employees simply find their name and double click on it to clock in or out.

The ClickClock main screen (shown on the right) contains two lists - one of employees who have not clocked in using ClickClock, and the other a list of those who have. The current time (of the computer that ClickClock is installed on) is also displayed.



To clock in using ClickClock, find your name in the **Out** section of the screen, and double click on it. This will move your name to the **In** section. To clock out, you do much the same thing - find your name in the **In** section of the screen, and double click on it.

ClickClock provides tool tips (ie helpful little text messages that appear when you hold the mouse cursor over something) to help you understand how to use it, but once it's been explained, it's really quite simple.

You can operate ClickClock using the keyboard, as well as the mouse. The **tab** key moves the highlight between the Out and In lists, while the **up arrow** and **down arrow** keys move the highlight between employees. Once you get to the employee you want, simply press the **enter** key to move the employee from one side to the other.

Transferring data between FirstStep and ClickClock

There are two ways data can be transferred between FirstStep and ClickClock:

- *FirstStep and ClickClock are installed and used on the same computer, or are installed on different computers, but the computers are both connected via a network.*

If this case, virtually everything happens automatically. Clock in and clock out data is stored on the computer that FirstStep is installed on, and FirstStep will collect that data periodically as it is configured. When you add, edit or delete employees, ClickClock will reflect those changes either the next time it is started, or when **Import Employees File** is run from its **File** menu.

- *FirstStep and ClickClock are installed on different computers, and the computers are not connected in any way, so the data is transferred manually via a floppy disk.*

In this case, clock in and clock out data is transferred to FirstStep by putting a floppy disk into the ClickClock computer, and selecting **Copy Output File To Floppy Disk** on the **File** menu. The floppy is then taken to the computer running FirstStep, going to the **Data Collection** screen, and pressing the **Manual Poll** button. After you add, edit or delete employees, put a floppy disk into the FirstStep computer, and select **Copy Employee File To Floppy Disk** on the **File** menu, then take the disk to the ClickClock computer and select **Import Employees File** from the **File** menu.

What if something goes wrong with the floppy disk?

What if you lose the floppy disk on the way to the FirstStep computer, or the dog eats it, or when you get there, there's an error on the floppy disk? ClickClock keeps a backup of the last file written to the floppy disk, and you can copy that file at any time from the **Help** menu, by selecting **Copy Backup File To Floppy Disk**.

ClickClock keeps this backup file until the next time you copy collected data to the floppy disk, at which time, the newly transferred data replaces the old backup file to become the new backup file.

Using TimeSheet FirstStep

The general idea is that FirstStep will process the clock in and clock out information entered using the ASP ClickClock program, and automatically adjust the times as specified by the rounding and meal break options you've set.

It's then your job to check the data, either on the screen or via a printed **Unadjusted Report**, make whatever manual adjustments are required, and then print out or export the final figures for use by the person who issues the pay cheques.

Adjusting Times

After data has been collected, the clock in and out times will need to be checked, and corrected if necessary. This is done from the **Edit Scans** screen.

FirstStep saves the **Start Date** every time you exit, so that when you run it again, the same start date is used.

When you open the Edit Scans screen, the Start Date there will be the same as it was the last time you used FirstStep, and the clock in and out times on the screen will be shown for the first employee in your database, for the number of days that you have set for the **Display Period**.

The In and Out times on the screen will have been adjusted according to the Rounding rules you have set, and the totals for each day will be the difference between the in and out times less the meal break if the times fit within the meal break rule you've set.

Note that FirstStep only displays **pairs** of in and out times on the main part of the screen – if there is an odd number of scans for a day, not all of the scans will be displayed in the main area of the screen.

If you've set FirstStep to **Auto Highlight** if more or less than a certain number of hours have been worked, days where that rule has been met will be highlighted in light blue. Days with an odd number of scans will also be highlighted, as will any 00:00 and 24:00 scans that have been automatically added according to the Midnight rule.

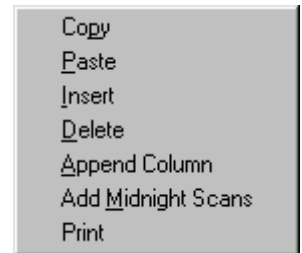
Along the bottom of the Edit Scans screen, you'll find the **Total Hours Displayed**, which is a grand total of all the **Hours** columns that are displayed on the screen. If the number of days displayed is the same as your pay period, and the **Starting Date** is the first day of your pay period, this figure will be the adjusted number of hours worked during the displayed pay period.

Just above this area of the screen, the unadjusted times for the currently selected day are displayed, so that you always have access to the raw figures to base your adjustments on.

To adjust a clock in or out time, click in the cell that you want to change, to the left of the time. That will highlight the time that's already in the cell, and you can then just type in a new time. Note that the unadjusted times for the day that you're editing are always displayed at the bottom of the screen.

If you need to insert a time into a blank cell, just click in that cell and enter the new time.

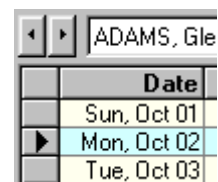
If you right click on a clock in or clock out time, the menu shown on the right will pop up, giving you access to other useful functions, which are described below. These functions are all also available using the buttons along the top of the Edit Scans screen.



To copy the time in the selected cell to the clipboard, select **Copy** from the pop up menu, or press the **Copy** button. To then paste that time into another cell, select the cell, right click, and select **Paste** from the pop up menu (or, again, press the **Paste** button).

You can also copy an entire row, rather than a single cell. This can be very useful where your employees usually work a fixed number of hours per day – you can just correct the times for one day (or use a day that's already correct), and copy that entire day to other days to correct them.

To copy an entire row into the clipboard, select a row rather than a cell by clicking on the grey area at the far left of the date on a row to move the selection arrow to that day, as shown on the right. This will highlight the row for the selected day. Then right click and select **Copy** from the pop up menu. To paste all the times for that day to other days, select another day as described above, then right click to pop up the menu, and select **Paste**.



If you need to insert a time either between two existing times, or as the first time for a day, you need to “slide” some or all of the existing times to the right to open up a blank cell. To do this, click in the first cell that you want to slide to the right, and select **Insert** from the pop up menu.

If you need to delete a time, right click on the cell containing the time and select **Delete** from the pop up menu - all the times to the right of the deleted cell will move to the left.

If you need to add a time after the last time for a day, and there are no blank cells after the last time, right click in the last cell and select **Append** from the pop up menu to add a column.

To add a 24:00 time to the end of a day and a 00:00 time to the start of the next day, select a day as described above, right click, and select **Add Midnight Scans** from the pop up menu, or by pressing the button.

Finally, you can print out all the times displayed on the screen by selecting **Print** from the right click menu, or by pressing the **Print** button.

Note that times must always be entered in order across a row – you can't enter an earlier time after a later time.

TimeSheet FirstStep Reports

The various types of reports that FirstStep can generate are described below.

Adjusted Report with all scans

Shown below is part of an Adjusted Report with all scans, showing a single employee.

| ADAMS, Glenn | | ID: | 773 | Workzone: A4 | | | | |
|------------------------|-------|-------|-------------|--------------|--------------|-------|-------|--------------|
| DATE | IN | OUT | In/Out DIFF | NORMAL | OT1 | OT2 | OT3 | TOTAL DAILY |
| Mon 16 Oct 2000 | 09:00 | 17:30 | 08:30 | 07:30 | | | | 07:30 |
| Tue 17 Oct 2000 | 08:45 | 17:30 | 08:45 | 07:45 | | | | 07:45 |
| Wed 18 Oct 2000 | 08:45 | 17:30 | 08:45 | 07:45 | | | | 07:45 |
| Thu 19 Oct 2000 | 09:00 | 17:30 | 08:30 | 07:30 | | | | 07:30 |
| Fri 20 Oct 2000 | 09:00 | 17:30 | 08:30 | 07:30 | | | | 07:30 |
| Mon 23 Oct 2000 | 08:45 | 17:30 | 08:45 | 07:45 | | | | 07:45 |
| Tue 24 Oct 2000 | 08:45 | 17:30 | 08:45 | 07:45 | | | | 07:45 |
| Wed 25 Oct 2000 | 09:00 | 17:30 | 08:30 | 07:30 | | | | 07:30 |
| Thu 26 Oct 2000 | 09:00 | 17:30 | 08:30 | 07:30 | | | | 07:30 |
| Fri 27 Oct 2000 | 09:00 | 17:30 | 08:30 | 07:30 | | | | 07:30 |
| Employee Total: | | | | 76:00 | 00:00 | 00:00 | 00:00 | 76:00 |

At the top of this segment of the report, the employee's name, Employee ID number and Workzone are shown, followed by headings for each of the columns below. The left-most column shows the date, then there's a pair of clock in and clock out times, followed by the number of hours between the clock in and clock out times (In/Out DIFF). If there is more than one pair of clock in/out times for a day, the remaining pairs will be listed below the first pair.

The next four columns list the number of hours that have been assigned to each of the four pay categories, Normal, OT1, OT2 and OT3, followed by the total number of hours worked for the day.

You've probably noticed that the hours listed under the pay categories and the In/Out DIFF column do not add up – this is because a meal break has been subtracted from the In/Out DIFF column.

At the bottom of the report segment, the totals for each of the pay categories are shown.

If this was an Unadjusted Report, and there were missing scans (for example, a clock in without a matching clock out), the totals across the line could not be calculated, and will therefore be blank and totalling zero hours.

Adjusted Report with daily totals

The “all scans” report shown on the previous page may contain too much detail for some uses, so an alternative is just to show the daily totals without the actual scans. In this particular example, there's not a lot of difference between the two reports, because this particular employee only had one pair of scans per day.

| ADAMS, Glenn | | ID: 773 | Workzone: A4 | | |
|------------------------------|--------|--------------|--------------|--------------|--------------|
| DATE | NORMAL | OVERTIME1 | OVERTIME2 | OVERTIME3 | TOTAL |
| Mon 16 Oct 2000 | 07:30 | 00:00 | 00:00 | 00:00 | 07:30 |
| Tue 17 Oct 2000 | 07:45 | 00:00 | 00:00 | 00:00 | 07:45 |
| Wed 18 Oct 2000 | 07:45 | 00:00 | 00:00 | 00:00 | 07:45 |
| Thu 19 Oct 2000 | 07:30 | 00:00 | 00:00 | 00:00 | 07:30 |
| Fri 20 Oct 2000 | 07:30 | 00:00 | 00:00 | 00:00 | 07:30 |
| Mon 23 Oct 2000 | 07:45 | 00:00 | 00:00 | 00:00 | 07:45 |
| Tue 24 Oct 2000 | 07:45 | 00:00 | 00:00 | 00:00 | 07:45 |
| Wed 25 Oct 2000 | 07:30 | 00:00 | 00:00 | 00:00 | 07:30 |
| Thu 26 Oct 2000 | 07:30 | 00:00 | 00:00 | 00:00 | 07:30 |
| Fri 27 Oct 2000 | 07:30 | 00:00 | 00:00 | 00:00 | 07:30 |
| Employee Total: 76:00 | | 00:00 | 00:00 | 00:00 | 76:00 |

However, if the employee had clocked in and out for lunch, or had more than one work period in a day, the “all scans” report would have been one line for each work period for each day.

Adjusted Report with Weekly Totals

FirstStep can generate an even more concise report, showing one week per line, as shown below.

| Start Date | Sun | Mon | Tue | Wed | Thu | Fri | Sat | IIOR | OT1 | OT2 | OT3 | Total |
|---------------------------|-----|----------------|-------|-------|-------|-------|---------------------|--------------|--------------|--------------|--------------|--------------|
| Name: ADAMS, Glenn | | ID: 773 | | | | | Workzone: A4 | | | | | |
| Mon, 16 Oct | | 07:30 | 07:45 | 07:45 | 07:30 | 07:30 | | 38:00 | | | | 38:00 |
| Mon, 23 Oct | | 07:45 | 07:45 | 07:30 | 07:30 | 07:30 | | 38:00 | | | | 38:00 |
| Employee Total: | | | | | | | | 76:00 | 00:00 | 00:00 | 00:00 | 76:00 |

Across the top of this report, there's a header line with the names of each of the columns down the report. Then, for each employee, there's a line containing the name, ID and Workzone of each employee listed.

The first column shows the date of the first day worked during the week, and the following figures are in columns under the days of the week that the hours were worked. Those hours are then distributed into the pay category columns, and totals for the week are given at the end of each line. At the bottom, totals for the pay category columns are shown.

Unadjusted Reports

FirstStep can also produce unadjusted versions of the **All Scans**, **Daily Totals** and **Weekly Totals** reports. These are identical in layout to the Adjusted reports, but the times listed are the raw, unadjusted times — that is, the actual times the employee clocked in and out, with no rounding and no editing.

Employee List

This report presents a list of all employees currently in the database. The list can be sorted in last name, first name, or employee ID order. Shown below is a segment of an Employee List Report.

| Employee Name | EmployeeID | ExportID | WorkZone | Commenced | Terminated |
|--------------------|------------|----------|----------|-------------|------------|
| ADAMS, Glenn | 773 | 773 | A4 | 01 Jan 2000 | |
| ALLAN, Rachael | 777 | 777 | A1 | 01 Jan 2000 | |
| ALLSOP, Tony | 1611 | 1611 | C0 | 01 Jan 2000 | |
| ANDERSON, Debbie | 2531 | 2531 | A4 | 01 Jan 2000 | |
| ANDERSON, Margaret | 599 | 599 | A4 | 01 Jan 2000 | |
| ASHWOOD, Sheona | 808 | 808 | A4C | 01 Jan 2000 | |
| ASKWITH, Stuart | 575 | 575 | A4 | 01 Jan 2000 | |
| ATTWOOD, Veronica | 830 | 830 | A4C | 01 Jan 2000 | |
| BARIAK, John | 830 | 830 | A4C | 01 Jan 2000 | |

In this example, the list is sorted by last name. Each line contains the name of the employee, their Employee and Export ID's, workzone, and the date they commenced work (or were entered into the database), and the date their employment was terminated (if it has been).

Export Report

FirstStep is able to export a text file for importing into other programs, using the ASP Standard Format, which creates a text file like this:

```
"ADAMS", "Glenn", "773", 75.00  
"ALLAN", "Rachael", "777", 67.50  
"ALLSOP", "Tony", "1611", 75.75  
"ANDERSON", "Debbie", "2531", 76.00
```

This file contains a single record for each employee, with each record containing the surname, first name, employee ID number, and total number of hours worked for the selected period.

Optionally, header lines can be included at the beginning of the text file, as follows:

```
"11:35:17 AM", "Monday, 6 November 2000", "Test Company"  
"Surname", "First_Name", "Employee ID", "Normal"
```

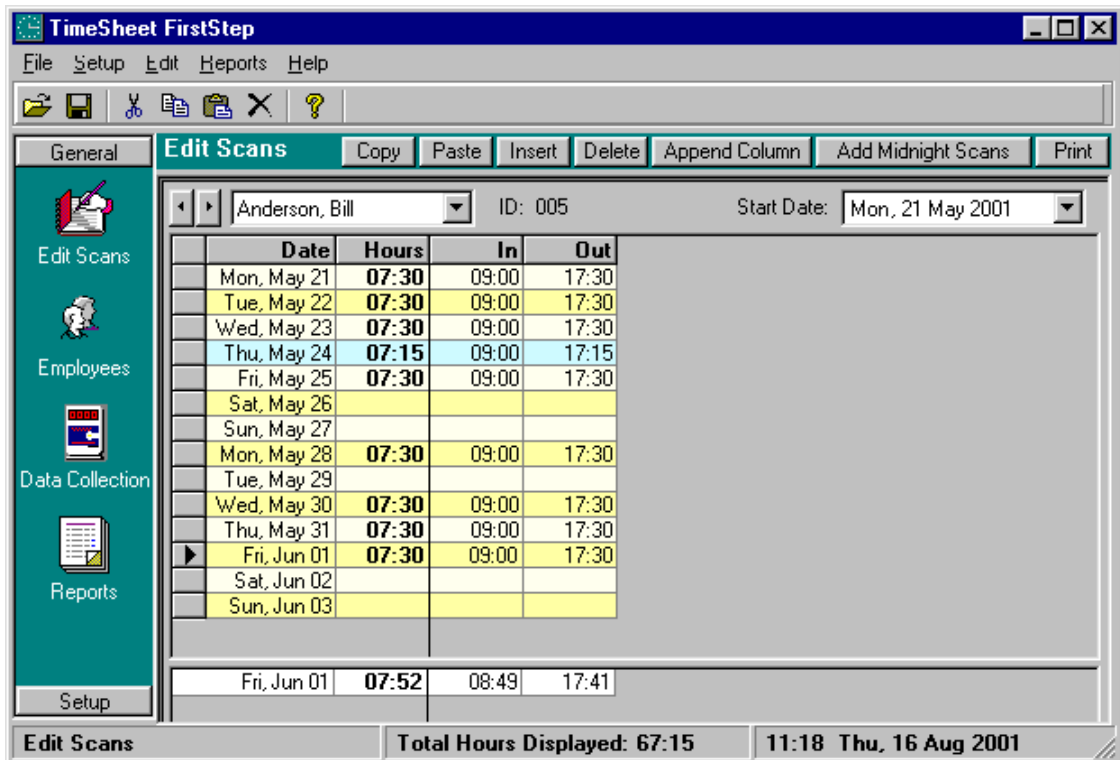
The first optional header line contains the time, date and company name, while the second optional header line contains the names of the fields in the following data. Either or both of these lines can be added using the relevant checkbox on the Export tab.




Screen Layouts and Menus


The following section of the manual is reference material, describing the layout and function of each of FirstStep's screens.

The Edit Scans Screen

The **Edit Scans** screen is where you'll do most of your work. You select a starting date, then an employee, and you get a spreadsheet-like view of the Display Period, with all the clock in and clock out pairs of times for the employee for that period.



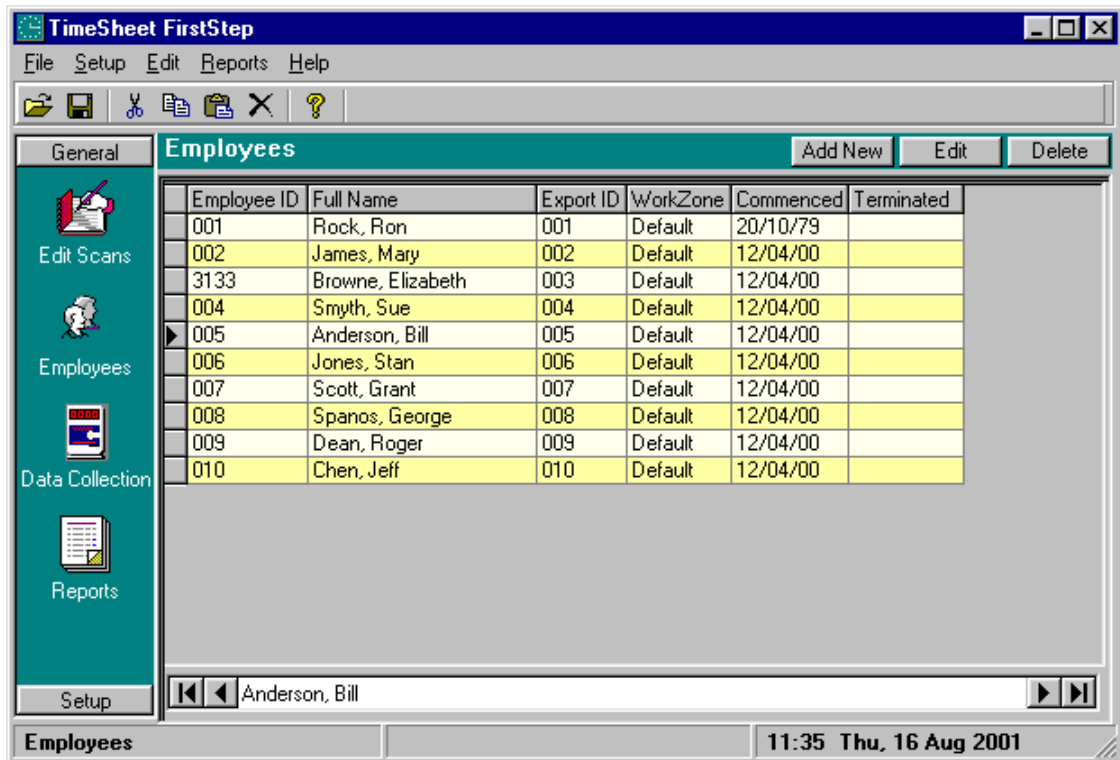
You can select an employee by pressing the  button at the right of the employee's name, then selecting an employee from the drop-down list, or you can move back and forwards through your employees by using the   buttons to the left of the employee's name.

The unadjusted times for the currently selected day (that's the day with the  to the left of it) are displayed near the bottom of the screen – in the example above, the unadjusted times for June 1st are displayed.




Unless you've already edited or changed the times, the differences between the adjusted and unadjusted times are due to the Rounding Options you've set for the whole program, or for this employee. In the example above, the unadjusted In time for Friday June 1st of **08:49** has been Rounded Up to the next 15 minute interval to become **09:00**, and the unadjusted Out time of **17:41** has been Rounded Down to the previous 15 minute interval to become **17:30**. See the **Options** screen for more information on rounding.

The Employees Screen

When you open the **Employees** screen, you are presented with a spreadsheet-like view of your employees, listed in the order they were entered into the database.



You can change the order of the display by clicking on one of the headings, which will sort the list by that column. To reverse the sort order, just click somewhere in the same column, then click on the heading again.

The currently selected employee is indicated by the  on the left of the list. To select a different employee, just click once anywhere on the line containing that employee. If you have more employees than fit onto the screen, use the scroll bar on the right, or the  and  buttons at the bottom of the screen, to move backwards and forwards through the list of employees to bring the desired employee into view, then click on the line containing the employee.

To **delete** an existing employee, select the employee, right-click to bring up a menu, then select **Delete**. A confirmation message will pop up, and if you answer **Yes**, the employee record will be permanently removed from the data file.

To **edit** an employee, select the employee, then right-click to bring up a menu, then select **Edit** to bring up the **Edit Employees** screen as shown on the next page.

To **add** a new employee, right click to bring up a menu, then select **Add New** to bring up the same screen, only with all the fields blank so that you can enter the details for the new employee. Note that the Employee ID must be unique – the same ID cannot be given to more than one employee.

The **Rounding**, **Meal Break**, **Overtime**, **Midnight** and **Auto Highlight** tabs are the same as, but override, those on the **Options** screen. This allows you to have, for example, overall settings that affect most employees, and then have different settings for particular employees.

The Data Collection Screen

Pressing the **Download** button on the main screen brings up the Data Collection screen.

The **Last Poll** section shows the date and time of the last successful data collection operation, while the **Next Poll** is the time and date of the next scheduled automatic poll as defined in the **Download Setup** screen. If there are no scheduled polls, this field will display Manual Poll.

| Download | | |
|---------------------|-------------|--------------------|
| Last Poll | Next Poll | Polling Activities |
| ▶ 12:58 23-Oct-2000 | Manual Poll | |

The **Polling Activity** field shows any currently occurring activity, such as which unit is being polled, and indicating when the downloaded data is being processed.

While collected data is being processed, a progress bar is displayed in the grey section of the screen.

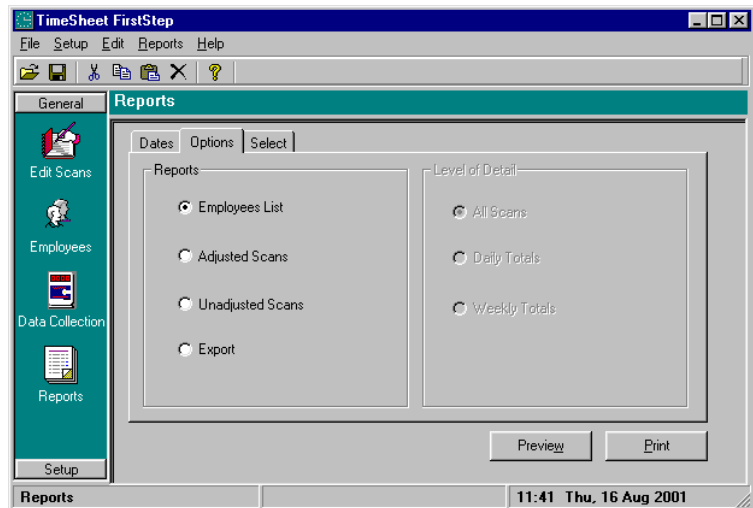
To start a data collection immediately, press the **Manual Poll** button at the bottom right corner of the screen. As a convenience, there's also a button that takes you to the **Download Setup** screen.

The Reports Screen

The Reports screen consists of four sections - **Dates**, **Options**, **Employees**, and **Export**.

When you enter the Reports screen by pressing the Reports icon, the first screen you're shown is the **Dates** tab, where you can enter the range of dates that will appear on the report, and set how you want the reports sorted.

The **From:** date is initially set to the same as the Start Date on the Edit Scans screen, and the **To:** date is initially set to **From:** date plus the number of days set in Display Period on the Options screen. This is done because you're most likely to want to print out data for the same period that you've edited, but you can change these dates to any period you wish.



To create a report, select the report period and the various options described above, then press the **Print** or **Preview** buttons. The Print button sends the report directly to the selected printer, while the Preview button opens a display window so that you can view the report on the screen. There's also a print button on this display window, so that you can commit the report to paper if you so desire.

Options tab

The **Options** tab lets you select the type of report you want to generate, and the level of detail you want in the report. You can generate an **Employees List**, an **Unadjusted Scans** or **Adjusted Scans** report, or an **Export** file. With the Unadjusted and Adjusted scans reports, you can also choose to list all scans, or only the daily or weekly totals.

Select tab

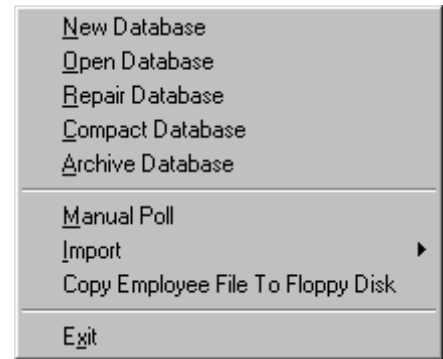
On the **Select** tab, you can select whether a report contains all employees, only selected employees, or only selected workzones. Selections are made with checkboxes.

The File Menu

FirstStep's **File** menu provides access to the following database maintenance functions, as well as (in some circumstances) allowing you to create or open a new database.

If the **FirstStep.mdb** database file exists when FirstStep is run, that database is opened automatically. If there is no existing FirstStep.mdb database file, a message will be displayed asking whether you want to create a new database file. You can answer yes or no, with obvious results – the new file either will or will not be created.

If you answer no, FirstStep will start without a database, and you will not be able to do anything until you create a new database or open an existing one. Selecting **New Database** will create a new database, and selecting **Open Database** will open a FirstStep.mdb database file if it exists.



Repair Database

Selecting **Repair Database** from the **File** menu instructs FirstStep to check the database, and re-establish indexes and pointers to the data in the database. The Repair Database function would normally only be used in circumstances such as the computer being turned off while you were using the program, which may result in database corruption. This function will endeavour to recover as much data as possible, and will warn you if any of the data could not be recovered.

Compact Database



Selecting **Compact Database** from the **File** menu checks the current database, and reclaims any available space in the database to reduce its size. You should try to compact your database regularly (once a month is ideal) to allow FirstStep to run most efficiently.

Archive Database

After you've been using FirstStep for some time, you may find that it's not as quick as it used to be at some functions. This is because the database grows with the new data added every day, and larger files take longer to process.

When FirstStep archives a database, all the basic information in the database, such as the setup information and the current employees, are carried forward, while the same information, plus past employees, and all data from the start of the current database up to and including the archive date, are left behind in the archived file.



Note that the archived database is a **read only file**, and accordingly no changes can be made to its contents once it has been archived.

The FirstStep database may be archived at any time, up to a date at least two days prior to the present date, but we recommend that the archive date corresponds with the end of a pay period.

To archive your database, select **Archive Database** from the **File** menu. The Archive Database box will tell you the date up to which the archive will include, and allow you to change the date with the by now familiar pop-up calendar. The box will also suggest an Archive Filename, which includes the date in reverse. Although you can change this name, it is recommended that you use it to ensure consistency.



Once the old data is archived and saved under the specified filename, you will not be able to open it with FirstStep, because FirstStep is designed to allow only a single database called **FirstStep.mdb**. However, if you manually rename the FirstStep.mdb file to something else, then manually rename the archived data file to FirstStep.mdb, you can then open it, remembering that it will still be read-only. You must remember to rename the files again when you're done.

Other members of ASP's Time and Attendance family of products do not have this restriction.

Manual Poll

Selecting **Manual Poll** from the **File** menu performs exactly the same function as pressing the Manual Poll button on the Download screen.

Import

To save time and effort, FirstStep allows you import a list of employees rather than type them in manually. You can import all or any of the employee information on the **General** tab of the **Add Employee** screen, but the minimum information needed by FirstStep is the employee's first and last name and their employee number.

If you don't import a **Commencement Date**, it will be set to the current date. If you don't import an **Export ID**, it will be set to the **Employee ID**. If you don't import a **Workzone**, it will be set to **Default**.

FirstStep's import facilities are quite comprehensive, but also rather technical and because of this, importing data may be confusing to some users. See *Importing Employee Details from a Text File* on page 37 for more details. If you need help importing an employee list, please contact ASP.

Copy Employee File To Floppy Disk

ClickClock needs to always have access to an up to date list of employees, so that the names can be displayed on the screen for your employees to select.

If ClickClock is installed on a computer that is not connected to the computer running FirstStep, you can use this function to copy FirstStep's employee list to a floppy disk, and then take the floppy disk to the computer running ClickClock and select **Import Employees File** from the **File** menu there.

The Setup Menu

The **Setup** Menu gives quick access to all of FirstStep's configuration screens.



Printer Setup

In many workplaces, computer users can use more than one printer, and this menu item allows you to select and configure the printer that FirstStep will use for reports.

Employees

Selecting **Employees** from the **Setup** menu is the same as pressing the Employees icon on the main screen – it takes you to the Employees screen, as described on page 25.

Download

Selecting **Download** from the **Setup** menu is the same as pressing the Data Collection icon on the main screen – it takes you to the Data Collection screen, as described on page 26.

Pay Categories

This menu item allows **Pay Category Names** to be defined, and these defined names can then be selected anywhere in FirstStep that uses Pay Category Names.

FirstStep has four pay categories, which are shown on reports as **Normal**, **Overtime1 (or OT1)**, **Overtime2 (or OT2)** and **Overtime3 (or OT3)**.

Normal hours are an employee's basic working hours for a day. The overtime categories are set to start after a specified number of hours have been worked for a day.

Although FirstStep has only four different categories, and the four categories are listed and totalled in reports under the names given above, the categories can be assigned different names for Export Reports, both on a global and individual basis.

Options

The Options screen is where all the major settings for FirstStep are controlled from. The Options screen contains six sections, which are described below.

Rounding tab

If employees clocked in and clocked out at their exact starting and finishing times, there'd be no need to adjust their scan times. In the real world, though, most employees will usually clock in a little early, and clock out a little late. Sometimes,

someone might get to work a little late, or go home a minute or two before knock off time. By the end of the pay period, instead of their hours adding up to exactly the right number, the actual totals based on their scan times will most likely be all over the place.

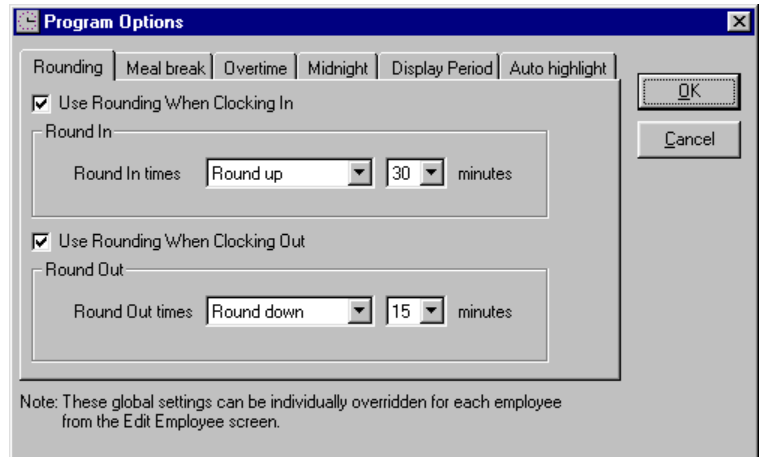
FirstStep's **Rounding Option** is designed to save you time and headaches by automatically adjusting clock in and clock out times based on rules that you set, both as overall rules, and as separate rules for individual employees if needed.

FirstStep can be set to automatically round the clock in times and the clock out times to rules that you set. You can decide to **Round Up**, **Round Down**, or **Round to the Nearest** interval of 5, 6, 10, 15, 30 and 60 minutes.

Note that all clock in times are adjusted by one rule, and all clock out times are adjusted by another rule. And, if your employees clock in and out for their meal breaks, those times will also be adjusted using the same rules.

Using these rules, you might decide to automatically round all clock in times up to the next 15 minutes. That way, if an employee clocked in between (for example) 08:46 and 09:00, their clock in time would automatically be adjusted to 09:00. If they clocked in late between 09:01 and 09:15, their clock in time would be rounded up to 09:15.

Similarly, you might decide to round down their clock off times to the previous 15 minutes. That way, if they clocked off between (for example) 17:30 and 17:44, their clock out time would automatically be adjusted to 17:30. If they clocked out early between 17:15 and 17:29, their clock out time would be rounded back to 17:15.



The following table shows the results of the **Round Up**, **Round Down** and **Round to Nearest** settings for various scan times:

| Actual scan time | Round up to next 15 mins | Round down to previous 15 mins | Round to nearest 15 mins |
|------------------|--------------------------|--------------------------------|--------------------------|
| 08:29 | 08:30 | 08:15 | 08:30 |
| 08:30 | 08:30 | 08:30 | 08:30 |
| 08:31 | 08:45 | 08:30 | 08:30 |
| 08:40 | 08:45 | 08:30 | 08:45 |
| 08:44 | 08:45 | 08:30 | 08:45 |
| 08:45 | 08:45 | 08:45 | 08:45 |
| 08:46 | 09:00 | 08:45 | 08:45 |
| 08:50 | 09:00 | 08:45 | 08:45 |
| 08:55 | 09:00 | 08:45 | 09:00 |
| 08:59 | 09:00 | 08:45 | 09:00 |



Note that the Rounding setting affects all employees, but you can create different overriding settings for individual employees from the **Edit Employee** screen.

Meal Break tab

Some workplaces pay their employees for their meal breaks, which means that the meal break time doesn't have to be subtracted from the working hours for the day. In these cases, FirstStep doesn't need to do anything special for or about meal breaks.

Other workplaces require their employees to clock out for their meal breaks, and then clock in when they're finished. Again, FirstStep doesn't need to do anything special here – the meal break time will be removed because they've clock out then back in again.

FirstStep can be configured to subtract a fixed amount of time for a meal break when an employee has worked more than a configurable number of hours for the day. For example, FirstStep it could be set to subtract an hour once an employee had worked more than 5 hours.



This setting affects all employees equally, however it can be overridden for individual employees from the **Edit Employee** screen.

Overtime tab

FirstStep provides for three overtime categories, which start after a certain number of hours have been worked. For example, the first category could be set to start after 7:30 hours (ie 7.5 hrs) had been worked, and the second category could be set to start after 9:00 hours had been worked. You don't need to use all three overtime categories – in fact, you don't need to use this facility at all.



Note that the times entered here are hours and minutes worked, **not** the time of day that overtime starts.

By unchecking the **Same settings for every day** option, you can use different overtime settings for different days of the week. Otherwise, the same settings are used for every day.



The overtime settings affect all employees equally, however they can be over-ridden for individual employees on the **Edit Employee** screen.

Midnight tab

FirstStep always works with single days – a work period is not allowed to continue over midnight.

If an employee does work over midnight, FirstStep is able to handle the situation by “pretending” that the employee finished work at the end of one day (ie at 24:00), then started work again immediately at the start of the next day (ie at 00:00).

FirstStep can be set to automatically add a 24:00 scan to the end of a day and a 00:00 scan to the start of the next day, when the final scan for the day is within the specified number of hours before midnight. You should consider the use of this option carefully – FirstStep applies the rule, and if the scans for the day meet the rule, the extra 24:00 and 00:00 scans are added, which may not always be what you want. When you’re editing times, it’s always possible to manually add the 24:00 and 00:00 times from the right click menu, and you can also easily delete any 24:00 and 00:00 times that have been automatically added.



This setting affects all employees equally, however it can be over-ridden for individual employees from the **Edit Employee** screen.

Display Period tab

This is where you set the number of days that are displayed on the Edit Employees screen, and the default number of days for reports.

Auto Highlight tab

FirstStep can be set to automatically highlight days where the hours total for that day is more or less than figures you specify. For example, if your employees normally work seven and a half hours a day, you could set this to highlight days where more than 7:30 hours or less than 7:30 hours had been worked.

Even if your employees don’t work such regular hours, there might still be some benefit in highlighting days where more or less hours than you are expecting have been worked. For instance, perhaps everyone is supposed to work more than three hours and less than twelve hours.

FirstStep will always highlight days where there are an odd number of scans in that day to bring those days to your attention.



This setting affects all employees equally, however it can be overridden for individual employees from the **Edit Employee** screen.

Password

FirstStep allows you to set up an access password so that unauthorised people can't get into FirstStep and alter important details. You don't have to set a password - it's entirely up to you to determine whether the added security is important.

Selecting **Password** from the **Setup** menu will bring up the **Change Password** window. Since this is the first time you've set a password, you can ignore the **Old Password** text entry box - there won't be an old password. Click in the **New Password** box, then type your password, which can be up to 30 characters long. Then, click in the **Verify** box and type your password again. If the two passwords are the same, your new password will be set. If they're not, a warning message is displayed, and you'll have to enter your new password again.

Company Name

Setting up FirstStep with the name of your company is just as easy - just click on the **Setup** menu, then select **Company Name** to bring up a window where you can type up to 25 characters. The Company name appears on the top of the FirstStep screen, and on all reports.

The Edit Menu

The **Edit** menu contains two items – **Employees** and **Scans**. Selecting one of these menu items takes you directly to the Employees or Edit Scans screens, just like pressing the icons on the left of the screen.

The Reports Menu

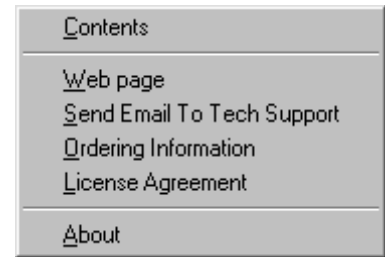
The **Reports** menu provides access to all reports that FirstStep can generate, exactly as is available by pressing the Report icon on the left of the screen. However, when you use the Report Icon, you have to select the type of report, whereas when you select a report from the Reports Menu, the chosen type of report will already be selected.



The exception is the **Evacuation report**, which appears only on this menu. When selected, FirstStep immediately collects clocking data, then prints a report of all employees who have clocked in for the day, but have not clocked out. Subject to situations such as staff having clocked out but remain in the building, or who are in the building but have not clocked in, this report shows all staff on the premises.

The Help Menu

The **Help** menu provides you with access to a number of resources to help you use FirstStep. The first item on this menu is **Contents**, which brings up a standard Windows help file.



Selecting **Web Page** from the next section of this menu will take you to the Time and Attendance section of ASP's Internet web site (if you have a web browser and Internet access). This section of our web site will be gradually expanded to provide access to the latest version of programs, downloadable manuals, product notes, and answers to frequently asked questions.

You can **Send Email to Tech Support**, provided you have an email program correctly installed on your system. This is an ideal way to obtain answers to your technical support queries.

If you select **Ordering information**, a text file containing information on how to purchase FirstStep will be displayed. Similarly, clicking on **License Agreement** will display the licensing agreement for FirstStep.

Selecting **About** displays the FirstStep "splash screen", which gives you the program version number, copyright information, a link to ASP's web site, and a **System Information** button that can be used to display technical information about your computer. To remove the splash screen, just click anywhere on it (other than on the web site address or the System Info button).

Data Collection and Downloading

Before you can start collecting clock-in and clock-out times for your employees, you need to configure the Data Collection section of FirstStep. You can do this by clicking on the **Setup** menu, then selecting **Data Collection** from the menu, to bring up the screen shown below.

The usual way of collecting clock in and clock out data for FirstStep is using the ASP ClickClock program, which creates a text file that FirstStep can import. Or, you can use ASP's ZipNet Terminals, either

wired-in or using the Direct DataTag Download facility, or any other device or program that outputs a text file that FirstStep can import.

If you wish, you can give each scanner or data collection point a **Scanner Name**, as we've done in the example screen above. This facility is more useful if you have ZipNet Terminals.

The **Scanner Type** can be set to **ASP ClickClock**, **ZipNet Terminal**, **Text File**, or **Direct DataTag Download**. In the above example, it's set to **ASP ClickClock**, which then enables the **Text Input File** section of the screen, and disables the **Address** section. In this section, you can set the location and filename of the text file that FirstStep is to collect data from. This text file can be located on the same computer that FirstStep is running on, or it can be located on another computer on your network.

FirstStep will delete this text file once it has successfully collected the data, and if the file is not there when FirstStep tries to collect data from it, it's not a problem. The required format of the text file is described in *Importing Scan Data from a Text File* on page 40.

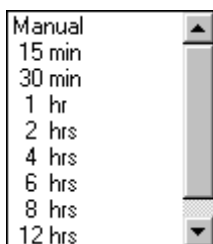
You can set up more than one scanner, and they don't all have to be the same type – you could have, for example, one scanner set to ASP ClickClock, another to Direct DataTag Download, three ZipNet Terminals and two text files, or any combination.

Finally, you need to set when or how often FirstStep will collect data, from the **Poll Options** tab, as shown on the right.

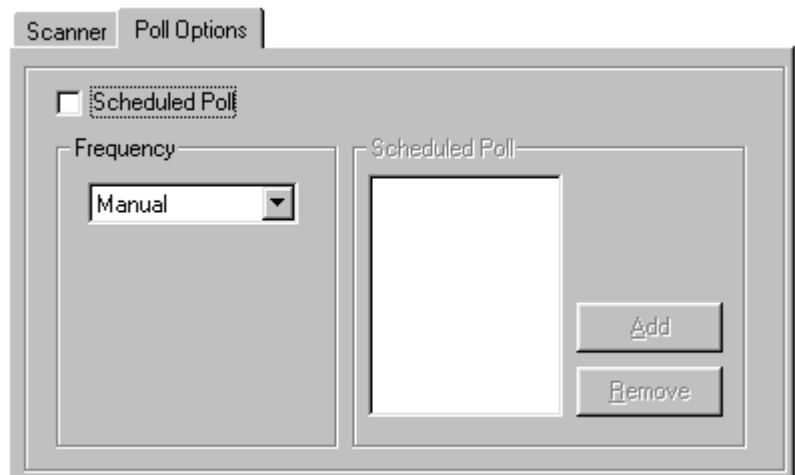
There are three ways that data can be collected –

Periodically, where FirstStep collects the

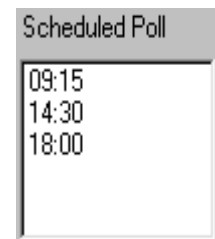
data at preset intervals (for example, every two hours, or every fifteen minutes), **Scheduled**, where FirstStep collects the data at preset times (for example, at 09:15 and 14:30), and **Manual**, where the data is collected only when the **Manual Poll** button on the Data Collection screen is pressed.



To set FirstStep to periodically poll the scanners, ensure that the **Scheduled Poll** box is not checked, and select the desired frequency of polling from the drop down box, as shown on the left.



To set times for scheduled polls, ensure that the **Scheduled Poll** box is checked, then click on the **Add** button to add a poll time. You must enter poll times in 24 hour format. If you need to remove a time that appears in the scheduled poll list, select it by clicking on it, then press the **Remove** button.



Once you've configured a scanner, press the **Save** button to store the settings, then press the **Close** button to get back to the main program.

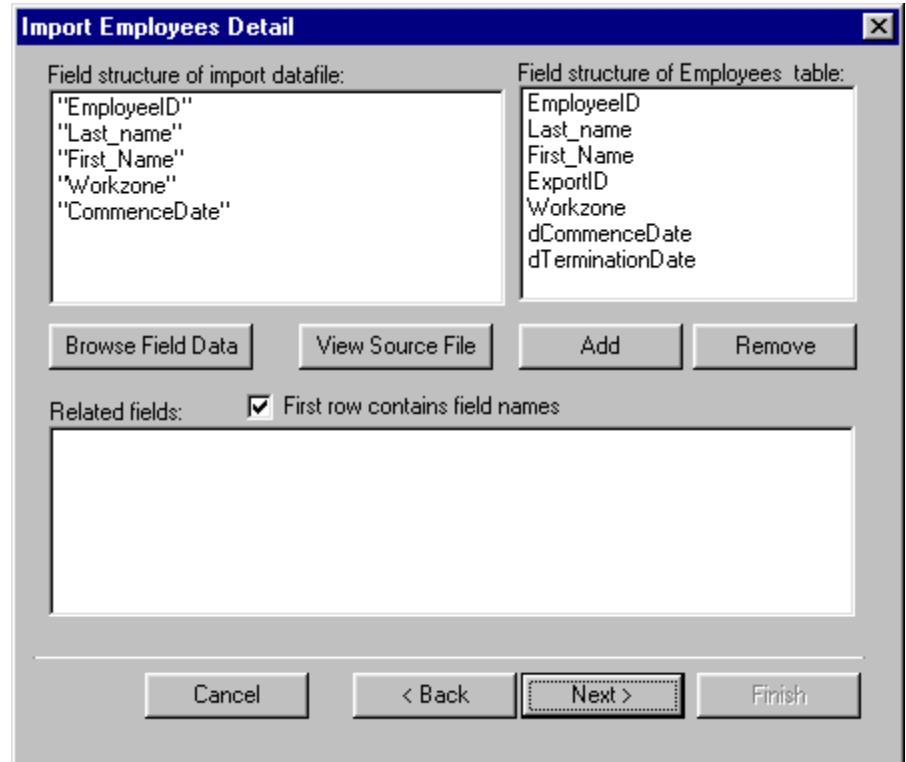
Importing Employee Details from a Text File

Entering employee names, ID numbers, and other details can be tedious. If you already have your employee details entered into another computer program, and that program can create a text file containing the details, you may be able to import the file into FirstStep.

To import employee details from a text file, select **Import** then **Employee Details** on the **File** menu, to open the wizard.

The first thing that the wizard needs to know is where the text file is located, and you can set this by pressing the **Browse** button.

Next, the wizard needs to know how the fields in the text file are delimited – the options are a comma, a tab character, or a custom delimiter that you specify. After you've specified this, the screen shown on the right will appear:

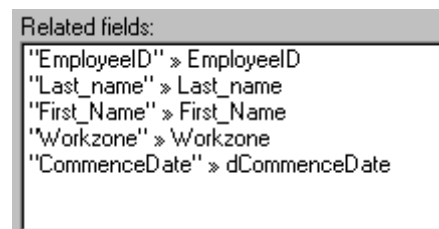


In the area at the top left, under the heading **Field Structure of import data file**, the contents of the first row (or record) of the

import file are displayed. As described below, this will either be the details for the first employee, or a description of the fields in the import file. If it's a list of the field names, make sure the **First row contains field names** checkbox is ticked, otherwise the field names will be imported as if they were employee details.

Under the heading **Field Structure of Employees table**, the names of the fields within FirstStep are displayed. What you have to do is match up the fields in the import database with the fields in FirstStep. You do this by clicking on a field name on the left side of the screen, and clicking on a field name on the right side of the screen, then clicking the **Add** button.

Once you've done this for all the fields you want to import (you don't need to import all fields, see below), the **Related Fields** section of the screen will look like the screen fragment on the right.



If you notice that you've made a mistake in the **Related Fields** list, you can remove the problem line by clicking on it, then pressing the **Remove** button. You can then re-select the correct fields.

Once you're happy with the connections you've established between the import file and the FirstStep database, click the **Next** button. On the following screen, you can press the **Finish** button to import the text file. Any errors will be displayed on the screen, and also written to a text file called **ConversionErrors.txt** in the folder that FirstStep is installed in.

At any time before pressing the Finish button, you can press the **Back** button to go back a step, or the **Cancel** button to quit without importing the text file.

After importing the data into the database, the **Employees** screen will be displayed again. If everything looks okay, you can begin using FirstStep. If there were errors during the import, or the data doesn't look right on the screen, you should delete the employees you added, and then begin again and repeat each step carefully.

FirstStep saves the connections you establish between the import file and the database, and offers to use it the next time you import employee details. If you ever import a file of the same format in the future, this saves you the step of having to define the related fields again. If the file you are importing is not in the same format as the last file you imported, you must not use the previously saved related fields information.

A fragment of a suitable text file is shown below:

```
"EmployeeID", "Last_name", "First_Name", "Workzone", "CommenceDate"  
"60", "THURLEY", "Colleen", "A1", 1/1/00  
"70", "COAD", "Jenny", "A1", 1/1/00  
"80", "KEENAN", "Joan", "A2", 1/1/00  
"90", "YOUNG", "Judith", "A4", 1/1/00  
"130", "WHITING", "Anne", "A1", 1/1/00
```

The following requirements and limitations apply to the import file:

- Each line of the text file must contain a single record, with each record separated into fields by a comma, tab or user-defined character.
- Text fields within each record must be surrounded by quotation marks.
- The first line of the text file can contain either the names of the fields in the following lines, or employee details. If the first line of text contains field names, make sure that you check the **First row contains field names** checkbox.
- Dates must be in the form **dd/mm/yy**, with the day and month as one or two digits. The year must be two digits only – four digit years are not allowed.
- The text file must contain at least an **Employee ID**, a **First Name**, and a **Last Name**. If the file doesn't contain an **Export ID**, it will be set to be the same as the **Employee ID**. If the file doesn't contain a **Workzone**, the workzone will be set to **Default**. If the file doesn't contain a **Commencement Date**, the commencement date will be set to the current date.
- Finally, remember that FirstStep has a limit of 16 employees – once you reach that limit, any further records in the text file will not be imported.

If you need help with importing an employee list into FirstStep, please contact ASP or your dealer.

Importing Scan Data from a Text File

Although FirstStep is designed to be used primarily with ASP's ClickClock program, or with ASP's ZipNet Terminals or Direct DataTag Download setup, any other device or program that can create a text file in the correct format can also be used.

When FirstStep is configured to collect data from a **Text File**, the text file must contain one or more lines of text in the following format:

```
"12345", "18:14", "19-10-2000"
```

Each line of the file must contain three fields, with each field contained within quotation marks, and separated from the next field with a comma.

The first field is the employee barcode or identification number, and must match FirstStep's **Employee ID**. The remaining two fields are the **time** and **date** that the scan was made. The time must be in 24 hour format, with the hours and minutes separated by a colon. The date must consist of the day, month and four digit year, separated with dashes.

The employee number field can optionally end with a > or < character to signal the intended direction of the scan, as shown below, where the first line is a clock in and the second line is a clock out.

```
"12345>", "09:00", "19-10-2000"
```

```
"12345<", "17:30", "19-10-2000"
```

TimeSheet FirstStep accepts, but ignores, this direction indication.

Common Questions and Answers

What if I have more than 16 employees?

If you have more than 16 employees, you should upgrade to TimeSheet Express, or one of ASP's other Time and Attendance systems.

How can I re-use an employee ID number?

FirstStep doesn't allow more than one employee to have the same employee ID number. If you need to re-use a previously used employee ID number, you have to change the employee ID number for the previous staff member **before** you can re-use that ID number for a new employee.

Click on the **Employees** button on the main screen, select the previous employee, right click, select **Edit** from the menu that pops up. and then change the Employee ID. We suggest you add something like the date of termination to the previous employee's ID number, so that you avoid complications if an ID number has been re-issued multiple times. For example, an existing ID number of 12345 might become 123450005 to signify that the employee left in May 2000.

Once you've changed the ID for the employee who previous held that ID, you can add the new employee and re-use the employee ID for them.

What happens if I adjust times in the future?


FirstStep keeps two sets of times – the raw unadjusted scans, which show the actual time of each scan, and the adjusted times, which are created by the application of the Rounding rules, or by manual editing from the Edit Scans screen.

Once adjusted times are created automatically, or are entered manually, no further automatic adjustments can be made. What this means is if you manually enter times for any day that you haven't yet collected scans, when the collected scan data is eventually processed, the rounding options will not be automatically applied, because they would then override the manual adjustments you'd already made.

Glossary

This section contains definitions for terms used in the program and in this manual.

- Activation Key** An Activation Key is used to unlock the evaluation versions of FirstStep and ASP ClickClock and turn it into a fully functional program, without the 14 day limit. To generate your **Activation Key**, we need your **Hardware Fingerprint**, and the **name** you want the program registered under.
- Adjusted Report** This report shows the adjusted clock in, clock out and hours worked times. The list of hours worked on this report is what you need to transfer to your payroll system.
- Adjusted Times** Unadjusted times become Adjusted times after they have been edited or changed manually from the Edit Scans screen, or when they are automatically change via Rounding options.
- Barcoded Cards** Credit card sized plastic Barcoded Cards are the simplest, least expensive, and most common way of identifying employees.
Barcoded cards can be printed with text, logos, photographs, the employee's name and signature, and can sometimes be used for other purposes (ie library lending cards, membership or identity cards, etc).
- Clock In Time** The Clock-in Time is the time that an employee scan in for a period of work.
Employees typically clock-in at the start of a working day, and then clock-out at the end of the working day. In some workplaces, employees may also clock-out at the start of their meal break, then clock-in again when their meal break is over.
- Clock Out Time** The Clock-out Time is the time that an employee scans out after a period of work.
- Commencement Date** An employee's Commencement Date is the date that an employee started work for the company, or the date when the employee was entered into FirstStep.
- Company Name** The Company Name is used in the title bar of the main screen, and at the top of all printed and on-screen reports. It is set by selecting Company Name from the Setup menu.

| | |
|---------------------------------|---|
| Currently Selected Day | The Currently Selected Day is the day with the  to the left of it on the Edit Scans screen. The unadjusted times for this day are shown at the bottom of the screen. |
| Date Entry Shortcut Keys | The keyboard Pg Up and Pg Dn keys move back or forwards one month, the Up arrow and Down arrow keys move back or forward one week, and the Left arrow and Right arrow keys move back or forward one day. The Home key resets the date to the first day of the month and the End key sets the date to the last day of the month. The Esc key cancels date selection, and the Enter key selects the highlighted day and exits back to the Reports Selection window. |
| Display Period | The Display Period is the number of days that are displayed on the Employees screen, and the default number of days for Reports. |
| Download | This the term used to describe the collection of scan data from ASP ClickClock, ZipNet Terminal(s), or text files. |
| Employee ID | This is a unique but otherwise arbitrary number assigned to each employee and used by FirstStep to identify the employee. If you're using cards or IDTags, it is the number encoded on the barcode card or IDTag. |
| Export ID | The text entered into the Export Identifier field is used on the Adjusted Attendance report to label hours worked within the defined category. Export Identifiers are also used with the export facility. |
| Global Setting | A global setting is one that affects all employees. Global settings can be over-ridden for individual employees. |
| Hardware Fingerprint | A Hardware Fingerprint code is a code that is unique to a particular computer. The Hardware Fingerprint is used, together with the name the program is registered to, to generate an Activation Key to register your copy of FirstStep and ClickClock. |
| Help Button | Pressing this button brings up the online help window. |

| | |
|---------------------------|--|
| Meal Break | A Meal Break is just what it sounds like - when your employees have their lunch (or other meal). FirstStep can be set to automatically deduct a meal break after a certain number of hours have been worked in a day. |
| Normal Hours | Normal hours are an employee's basic working hours for a day. The overtime categories can be set to start after a specified number of hours have been worked for a day. |
| Overtime | <p>The term Overtime, as used by the FirstStep program, refers to hours worked after a specified number of normal hours have been worked in a shift. The rates these hours are payed at is entirely up to you and your payroll program.</p> <p>FirstStep has three overtime categories, which are called Overtime1 (or OT1), Overtime2 (or OT2) and Overtime3 (or OT3) in reports. Pay Category Names can be used to identify these categories in export reports.</p> <p>Overtime categories are set to begin after a specified number of hours have been worked. For example, category Overtime1 might be set to start after 8 hours have been worked in a day, and category Overtime2 might be set to start after 9.5 hours have been worked.</p> |
| Password | The Password is used to control who has access to the FirstStep database. |
| Pay Category Names | Pay Category Names are labels that can be assigned to the Normal Hours and Overtime Hours definitions in Shift Profiles. |
| Payroll Export ID | <p>The Payroll Export ID is the number used in your payroll program to identify an employee. If a Payroll Export ID is set, it will be used in the export file, otherwise the Employee ID will be used.</p> <p>The Payroll Export ID is used where you cannot change the Employee ID numbers in your payroll program to suit the card or IDTag numbers used by FirstStep.</p> |
| Payroll System | This term refers to your existing manual or computerised payroll system. |

Pop Up Calendar

The currently selected date is highlighted by a grey oval. If the displayed month is the current month, today's date will be circled in red.

To move backwards or forwards by one month, click on the arrows at either side of the month and year, or press the keyboard **Pg Up** and **Pg Dn** keys. To select a different month from a list, click on the month name. To select a different year, click on the year to display a pair of buttons to step through the years.

To move backwards or forwards by one week, press the keyboard **Up arrow** and **Down arrow** keys. To select the first or last day of the month, press the keyboard **Home** or **End** keys.

To select a date using the mouse, simply click on the desired day. To select a date using the keyboard, use the **Left arrow** and **Right arrow** keys to locate the day, then press **Enter** to select the highlighted day.

You can press the **Esc** key to cancel date selection and retain the current date.

Read Only File

A Read Only File is one that has been created in such a way that no new data can be added to it, and the data already in it cannot be changed.

Start Date

The Start Date is the first date listed on the screen or on a report. In most cases, this will be the first day of your pay period.

Termination Date

An Employee's Termination Date is the date on which the employee ceased to work for the company.

Total Hours Worked

The Total Hours Worked are the adjusted hours worked by an employee in a shift period.

Unadjusted Report

This report shows the actual clock-in and clock-out times for each employee, as they were scanned, with no adjustments made.

Unadjusted Times

Unadjusted times are the actual times that people clock-in and clock-out.

| | |
|------------------------|---|
| UNC Filename | <p>UNC is short for Universal Naming Convention, or Uniform Naming Convention, and is a way of specifying the location of a file on a local-area network (LAN). A UNC filename uses the following format:</p> <p>\\server-name\shared-resource-pathname</p> <p>So, for example, to access the file test.txt in the directory examples on the C: drive of the server silos, you would use the UNC filename \\silos\c\examples\test.txt</p> |
| Working Hours | <p>Working Hours is the term used by FirstStep to refer to the hours worked by an employee during a shift.</p> |
| Workzone | <p>A Workzone is simply a convenient way to group employees.</p> |
| ZipNet Terminal | <p>A Time and Attendance data collection terminal, which displays the time, and accepts and stores data from IDTags and barcoded cards.</p> |

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