

## Quick Start Guide

Basic information is all that is needed to get started using ExpressTime. Start by adding the following:

1. ADD USERS AND PERMISSIONS
2. ENTER BUILDING/ CLIENT INFORMATION
3. ENTER EMPLOYEE INFORMATION

Begin by logging onto the Database, using the Company ID (online users only), Login and Password that you have been assigned.

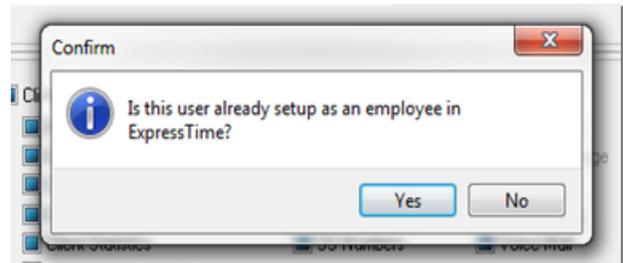
### 1. Add Users And Permissions

It is recommended that each person accessing your database should have their own login and password. ExpressTime is designed for multi-user use and therefore includes the setup of various users and their access on a screen basis. The System Administrator will be able to limit or broaden each user's program authorizations. This is done by using the check boxes beside each area of ExpressTime. Note: this is not for your standard employees

- Click on **Administration** at the top of the screen and choose **Users** from the drop down menu.
- Click the (+) to create a new user login.
- Confirm whether or not the employee has already been set up as an employee.

**YES** - If your **User** is an existing employee a **Login Name** (1<sup>st</sup> Name) and **Password** (Emp. Pin) will default when the employee name is selected under **User's Name**.

**NO** – If User is not an existing employee, you will need to create a **Login Name**, **Password**, **User Name** and **Email** address.



- Click each box in front of the topic you want the user to have access to. Refer to the **Authorization Key** for options.
- To save, or post, the record, click the check mark (✓) at the top of the record.

### 2. Entering Building / Client Information

- Click on **Customers** at the top of the screen and choose **Buildings** from the drop down menu.
- To insert record or to enter building information, go to the **Building** tab. To add a new record, click on the plus sign (+) directly below the **Building** tab and fill in the appropriate information.
- **Company** is not a required field so system will automatically go to **Building Name** field. Refer to User Guide or help file later for more information on how the **Company** field can be utilized.
- **Building Name** is all that is required to proceed but for your reference all other information such as **Address**, **Phone**, and **Contact information etc...** is recommended. No boxes needed to be

checked other than the ones already checked by default to proceed. The User Guide will go into more detail as to their functions. To save, or post, the record, click the check mark (✓). If you have another building to add, click on the (+) and repeat the steps above. The **Building** name will appear on the left hand side of the screen after posting the record.

### **3. Entering Employee Information**

- Click on **Personnel** at the top of the screen and choose **Employees** from the drop down menu.
- To insert an employee, click on the plus sign (+) to start a new record.
- Defaults such as **Language**, **Service**, **Status**, and **Pay Rates** are populated automatically and can be customized under **Administration/ Settings/ Personnel Settings** to fit your business.
- Enter the following *required* fields **Last Name**, **First Name** and **SS Number**. The employee pin will be generated from the last 4 digits of the employee's SS Number.
- If you would prefer to assign a different PIN, please contact us for instructions. Nothing more is required at this point.

If the employee is a **Supervisor** the Supervisor box must be checked and the **Paging Number** field must contain the number you want the system to dial in order to page this employee. This subject is covered toughly in the **Scheduling and Notification Set Up** section.

- To save, or post, the record, click the check mark (✓). If you wish to enter another employee, click the plus sign (+) and repeat the steps above. Continue this process until all employees are entered.

**Now that you have the building and employee information entered, your employees can begin using the system to clock in and out.**

#### **FOR ONLINE USERS ONLY:**

To clock in or out, dial **1-866-583-8101**; you will be prompted to enter the following information:

- Company ID
- Employee PIN (the last 4 digits of SS number unless you have selected otherwise)
- Building number
- Then Press **1** to clock in or **2** to clock out

A wallet cards can be printed by going to Personnel / Reports / Employee – Employee Wallet Cards