deluxe

Deluxe HCM Supervisor's Quick Start Guide

Dashboard

The **"Dashboard"** is your landing page after logging in. The **"In the Now"** Dashboard is designed to display all necessary information which need immediate attention so you can manage your team very efficiently. It has Four sections: **"Menu Bar, Needs Attention, Needs Approval, and Team Status"**.
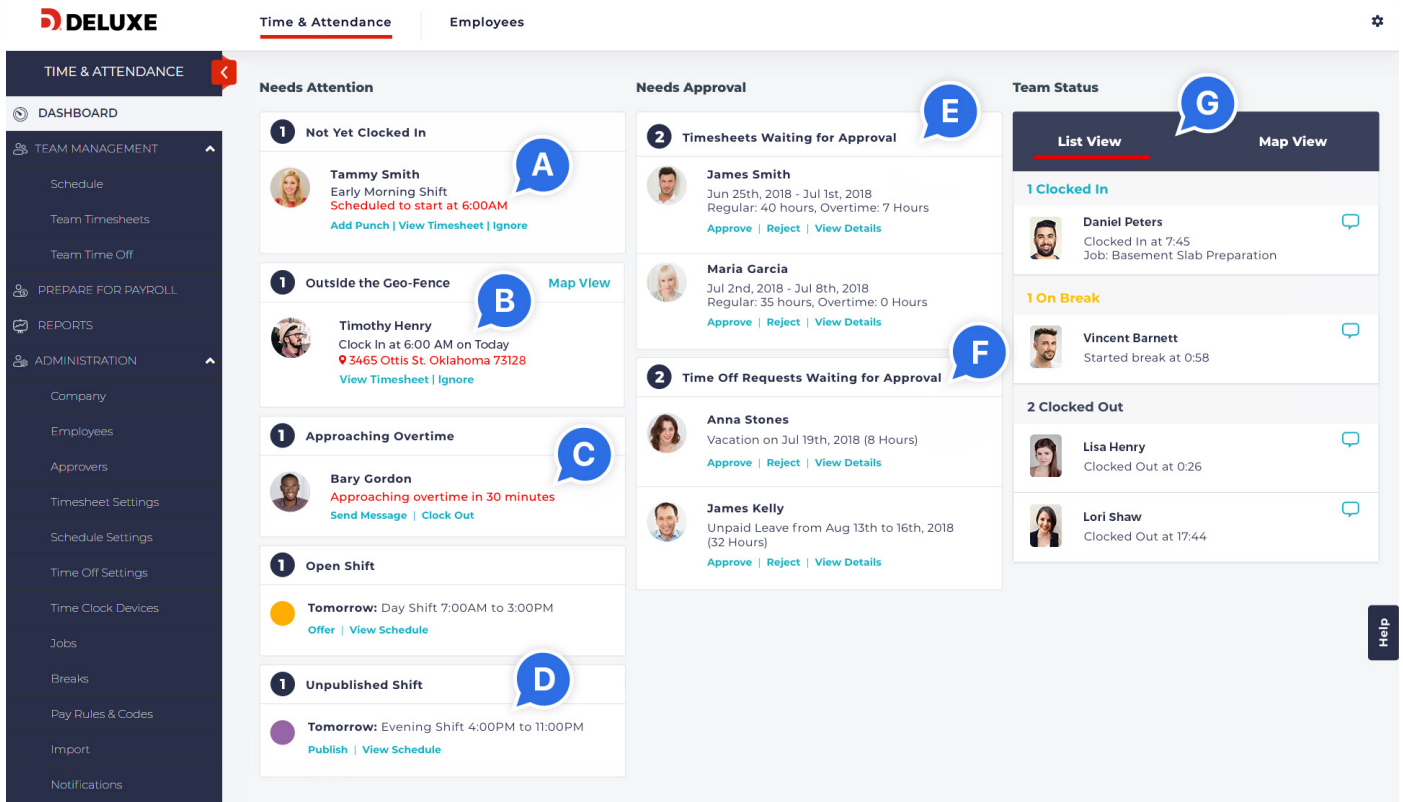
Needs Attention

Will show notifications such as:

  A. Employees, who are late for their shift.

  B. Employees who clocked in/out outside the geo-fence.

  C. Employees who are approaching overtime.

  D. Open shifts in the schedule that have yet to be taken by an employee.

Appropriate Action can be taken directly from the Dashboard.
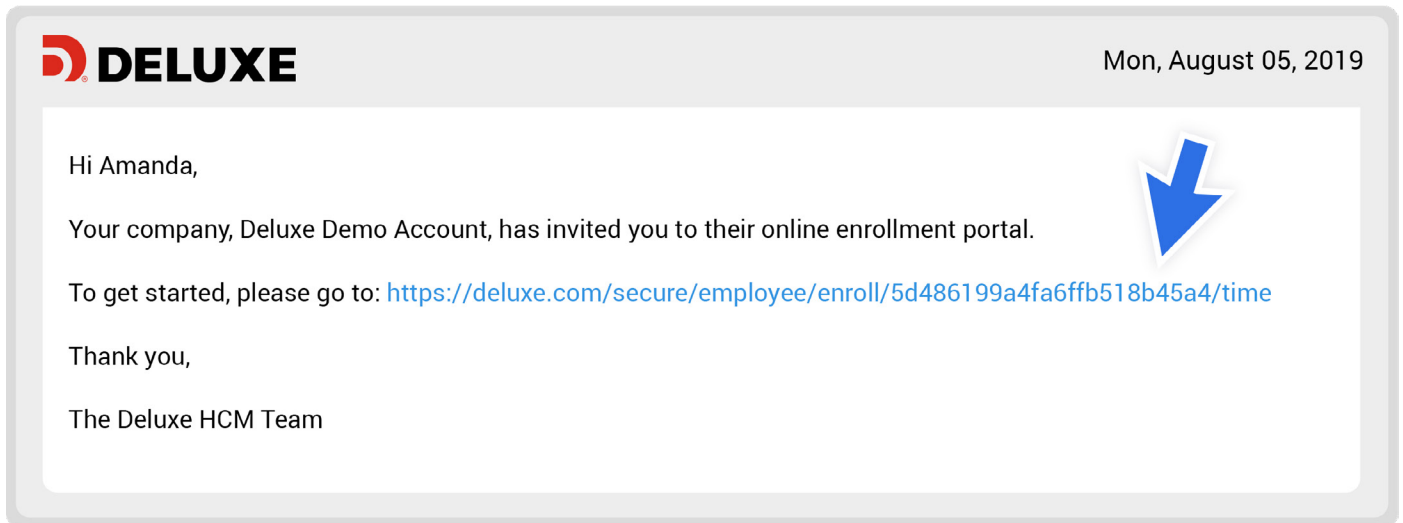
Needs Approval

  E. Will show and let you approve or reject time sheets.

  F. Will show and let you approve or reject time off requests.

Team Status

  G. Will show all your employees who have:
  Clocked in
  Are on Break
  Clocked out
  Clock in/out Location

Employees

Please make sure that employees have received appropriate instructions to create their account, user name, password and method of accessing the Deluxe HCM system. Employees would have received an email from Deluxe containing a link to create an account, similar to this sample email.

DELUXE   Mon, August 05, 2019

Hi Amanda,

Your company, Deluxe Demo Account, has invited you to their online enrollment portal.

To get started, please go to: https://deluxe.com/secure/employee/enroll/5d486199a4fa6ffb518b45a4/time

Thank you,

The Deluxe HCM Team

Once they click on the link, it will take them to a page where employee can create an account and choose their username and password. Employees can then use any of the three methods selected by the employer.

iPad	**Mobile App**	**Computer / Laptop**
Employees can login using their 6-digit PIN that will be provided by the Employer or via facial recognition.	Employees should download the Deluxe HCM App, and login using the email address and password they created using the registration link sent to them.	Employees can log into **www.deluxehcm.com** OR **mypaycenter.com**

Employees can view the schedule you create for them by logging into their account using a computer/laptop or mobile app. They can then enter time worked, submit their timesheets, drop or swap shifts and request time off.

How to Create the Schedule

1. Go to the **"Schedule"** tab under the **"Team Management"** section.

2. Hover over the date for that particular employee you want to make the schedule for and click the plus **"+"** icon.
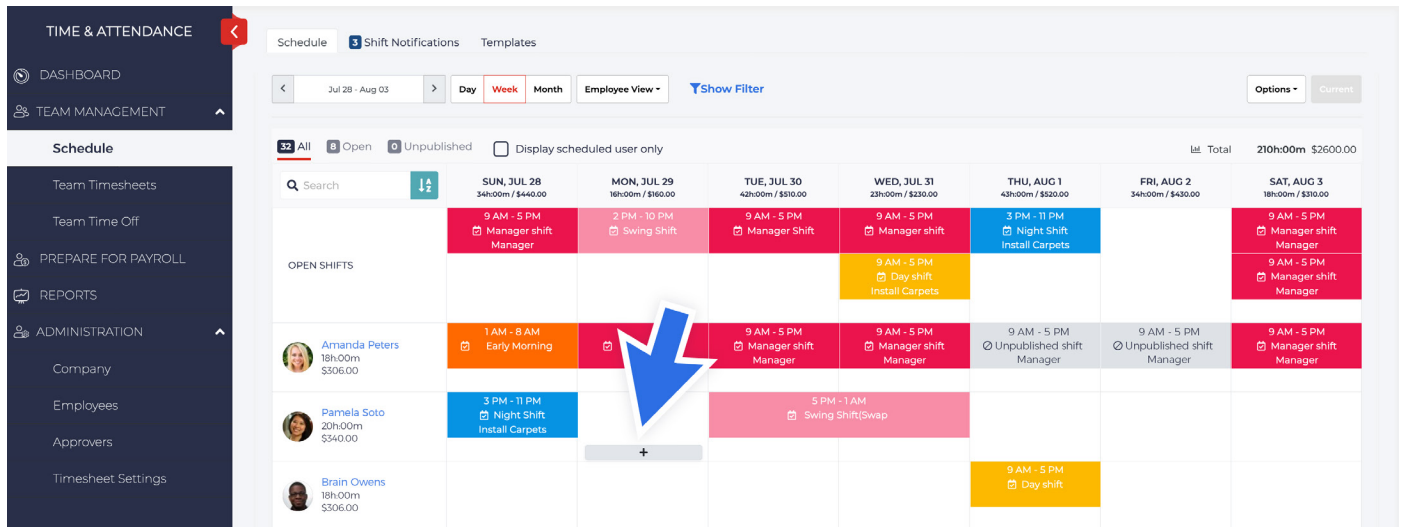
- A **"Create Schedule"** window should pop-up. Fill out all required information: Start Time, End Time, and Color (1-3) are required, while Shift Name, Job, Location, Add Break, and Repeat (4-8) are optional Click **"Create"**. A box with a colored outline will appear on the schedule page.

- Once done, click **"Publish"** and the employees will be notified of their schedule. The schedule box will change to a solid color.

How to Create a Schedule Using Template

1. Go to the **"Schedule"** tab under the **"Team Management"** section.

2. Go to the **"Templates"** tab.

3. Click the **"Add Template"** button.

4. An **"Add Template"** window should pop-up. Fill out all required information: **"Start Time, End Time, and Color (1-3)"** are required, while **"Shift Name, Job, Location, Add Break, and Repeat (4-8)"** are optional.

**5.** Once done, click **"Save"**.

Add Template

TIMEZONE

Eastern Daylight Time (GMT-4)   ▾

START TIME   END TIME

09:00 AM   03:00 PM

SHIFT NAME   Jobs

Standard   Please select the job

Location   Color

Unselected   ▾   🎨 #00D084

6. To create a shift using the template, go back to the schedule tab, hover over the date for a particular employee, and click the plus button. Once in the pop-up, select the template you just created. Click Create button.

Options ▾   Publish (22)

+Bulk Assign

🗑Bulk Delete

✎Bulk Update

⎘Bulk Copy & Paste
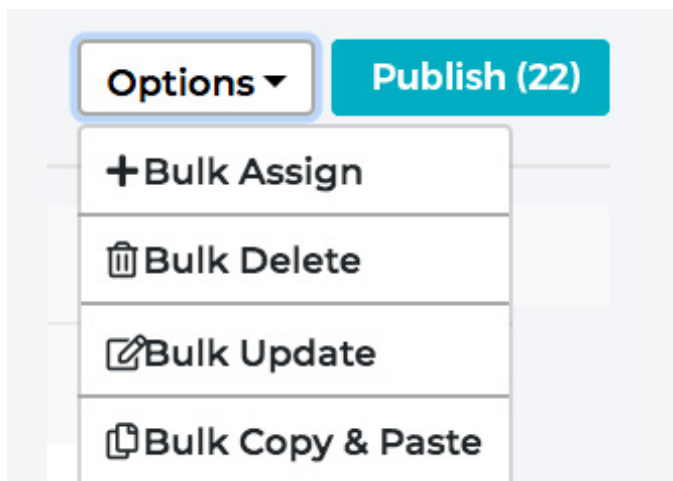
Advance Features

For bulk scheduling, click options and select from the menu.

All Timesheets Section

In the **"All Timesheets Section"**, a user will be able to:

A. Date range the timesheet period desired and the system will display all relevant timesheets to that period.

B. Search for a specific employee's timesheet for quicker results.

C. Filter the timesheets by Department, Work Location, Employment Type, or Employment Status (active, terminated).

D. Bulk Actions: Ability to **"Approve, Reopen, Force Approve",** or **"Force Reject"** several employees' timesheets all at one time. These settings will only affect employees that have a box checked next to their name.

E. View timesheets that are: **"Approved, Not Submitted, Rejected, Waiting for Approval",** or **"All Timesheets"** in separate tabs.

F. The gear icon in the top right corner of the module will give you the ability to adjust the different criteria displayed in the flat list of employees such as overtime hours, holiday premium pay, etc.

How to Edit a Timesheet

1. Go to **"All Timesheet"** section.

2. Click the name of the employee whose timesheet will be reviewed/edited.

3. Click the **"Add Punch/+ Add In / Out Time/Add Duration"**
(label will depend on the clocking method of the employee).

4. Check the date. For punch time entry, choose whether the punch is for in/out/break/resume/transfer.
For In and Out entry, choose whether the punch is for work/break.

5. Fill out all the required information such as start and end time or the duration of work in hours.

6. Tag jobs and breaks if necessary and click **"Save"**.
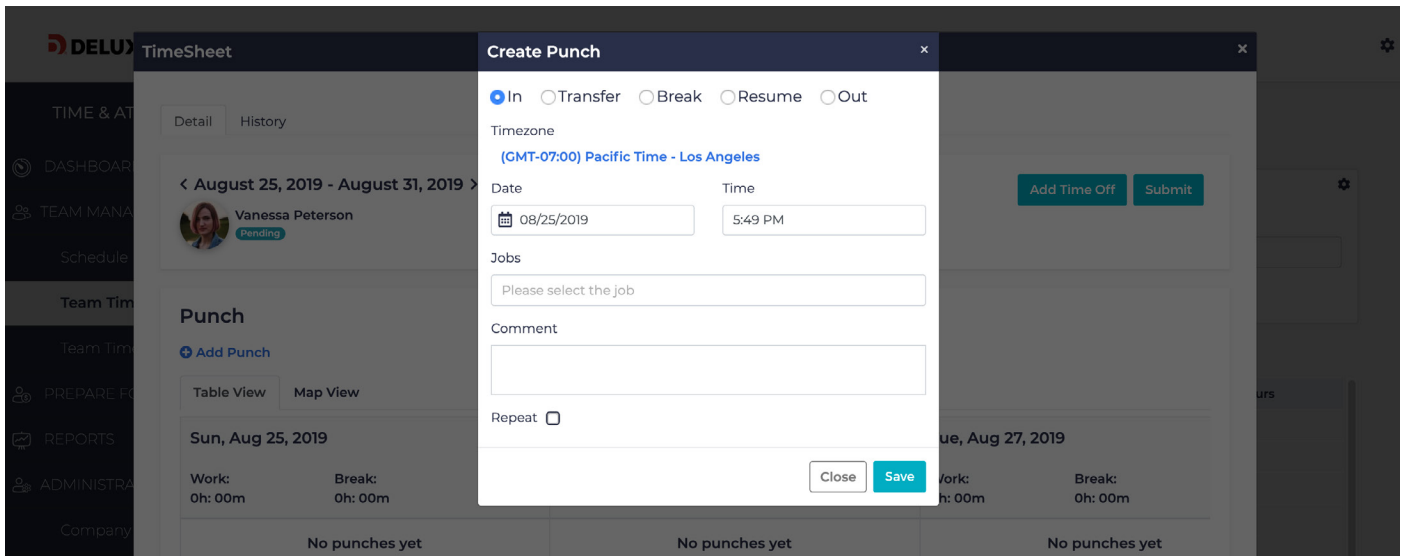
How to Approve a Timesheet

1. Click the name of the employee to open the timesheet.

2. Review the timesheet.

**3.** Click the **"Approve"** Button.
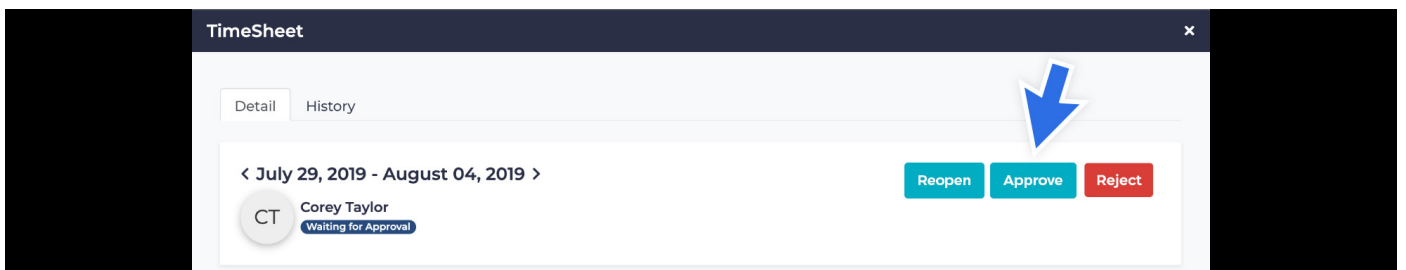
Time Off

1. Team Time Off Section

In the Team Time Off Bookings section a user can:

A. Search the time off requests submitted for approval by employee name.

B. Filter the employee's requests by Department, Policy name, Work Location, Employment Type, or Employment Status

C. Bulk Actions: in this section a user would be able to approve, reject or delete requests in bulk, this setting will only affect employees that have a box checked next to their name.
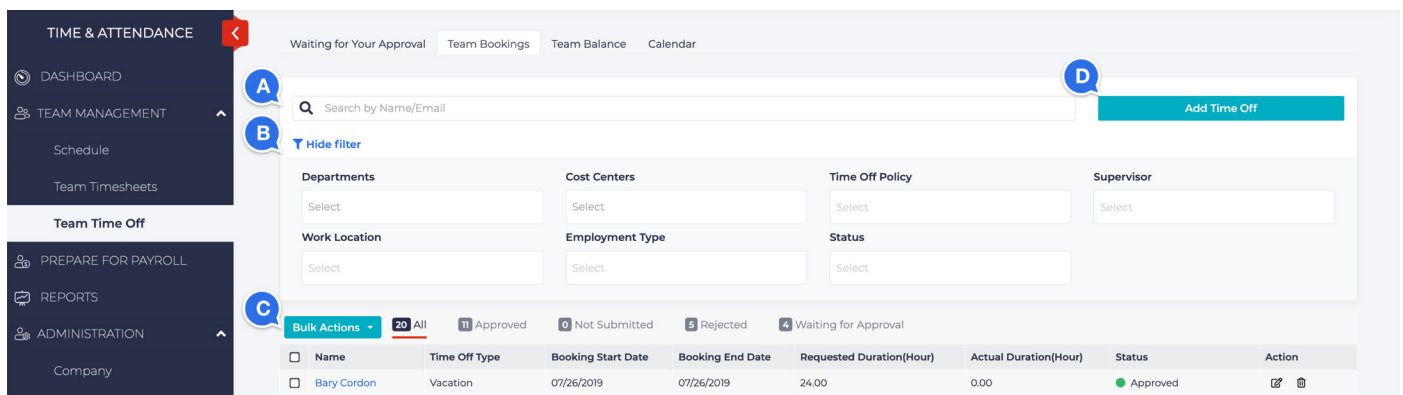
D. An administrator would also have the ability to book time off on an employee's behalf by clicking on the blue **"Add Time Off"** button.
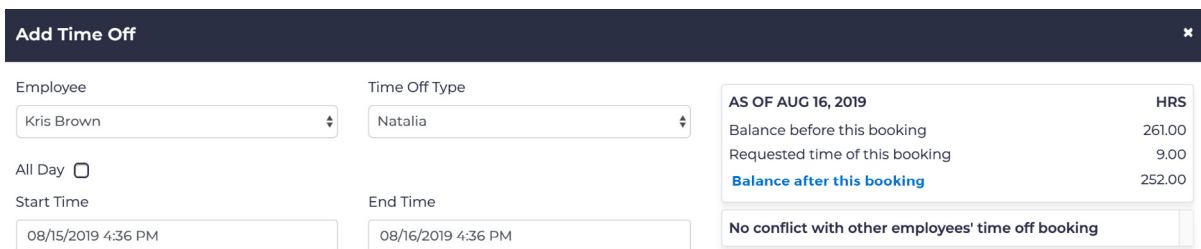
2. Team Balance Section

The **"Team Balance Section"** gives the user the ability to at a glance see their entire team's current time-off balances for all assigned policies.

3. Calendar Section

The **"Calendar Section"** gives a user the ability to view the requests for the entire month so that they can at a glance see how their employees requests layout, which in turn can be an insight into which requests to approve, and which to reject.
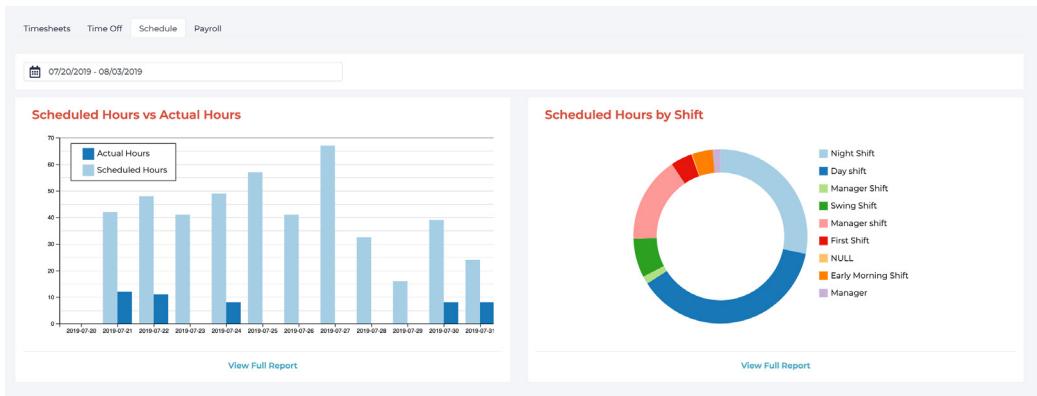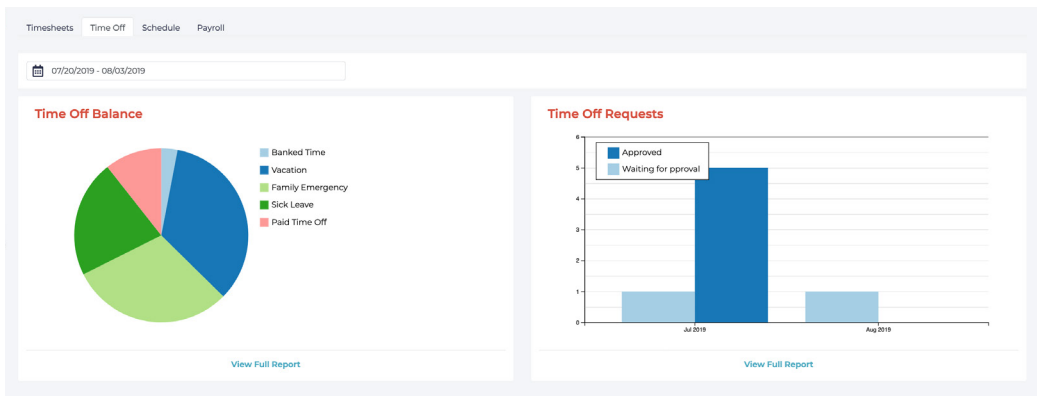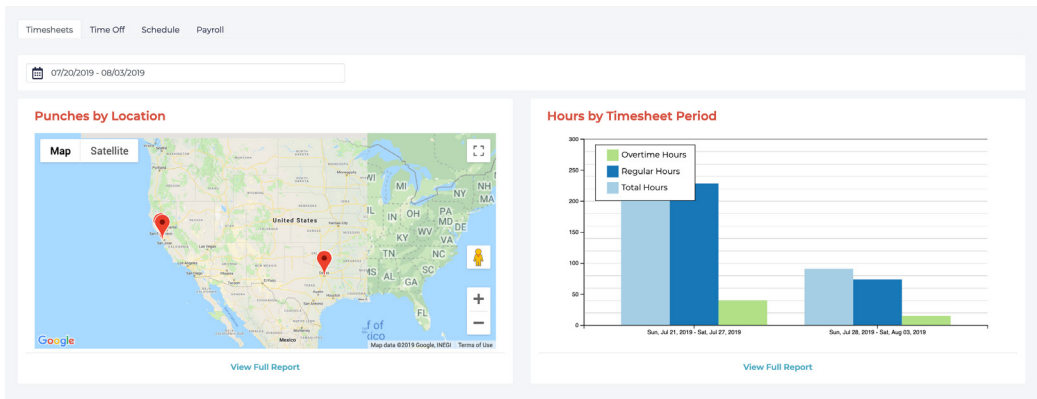
Reports

The **"Reports"** section will let you **"View"** or **"Download"** many reports as CSV files including:

Timesheets: Punches by Location, Hours by Timesheet Period, Hours by Day, Punch Data

Time Off: Time Off Balance, Time Off Requests

Schedule: Scheduled Hours vs Actual Hours, Scheduled Hours by Shift

Payroll: Total Cost By Job.

iPad Prerequisite

- Generation 2 or later

- 16 GB of minimum storage

- Any size iPad (ex: iPad, iPad Mini, iPad Air, iPad Pro)

- iOS software version 12 or later

How to set-up the iPad

1. Download the **"Deluxe TimeClock"** App from the App store.

2. There are two ways in setting up the time clock:

A. Log in the app using the account owner credentials.
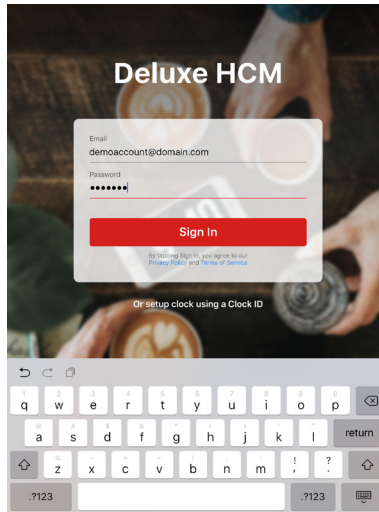
B. Get the Clock ID from the app and put it in the Time Clock Devices section in the Time and Attendance website. **"Administration > Time Clock Devices > Add New Device"**
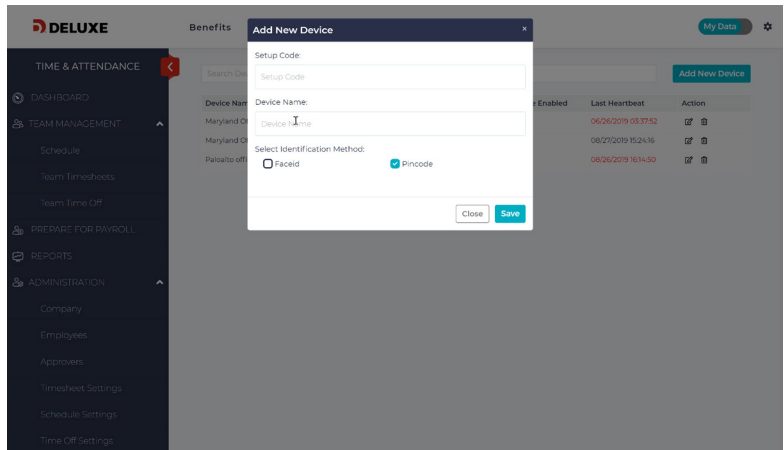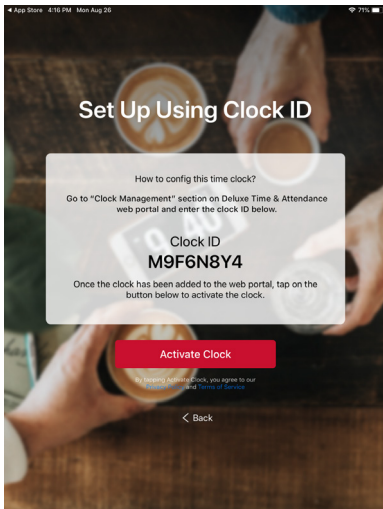
3. Choose from the two options above. Then choose whether employees will clock in via PIN code or FaceID. **"PIN code"** for each employee can be found in the **"Administration > Employees > Employee's name > Time and Attendance > Timesheets > Enable PIN"**. When you choose to Enable PIN Code, this will automatically send the employee an email with an individual PIN code.
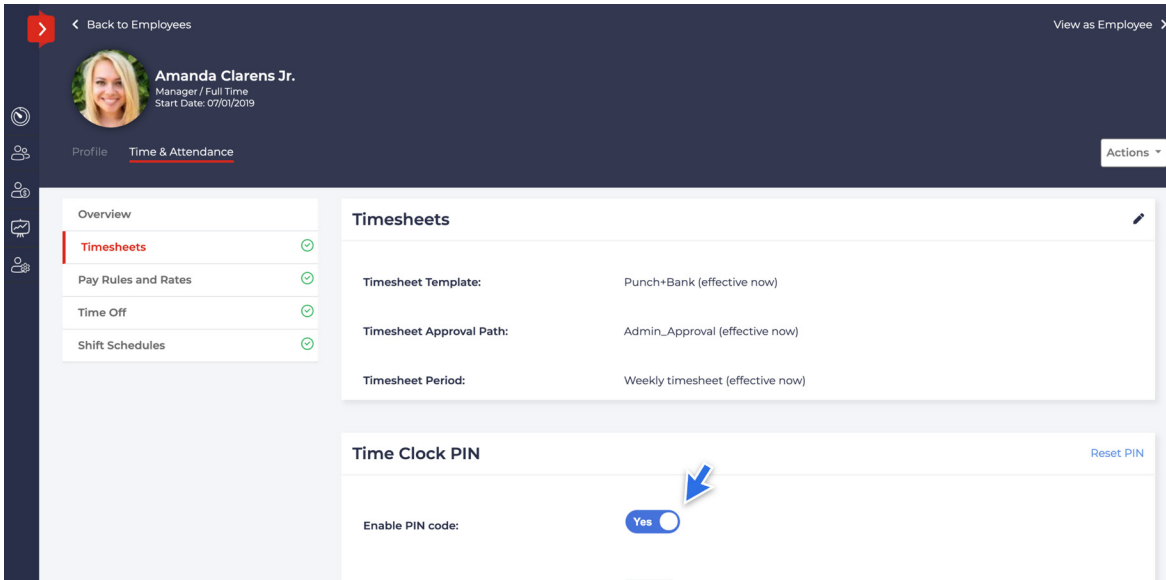

FaceID: After an employee receives the individual PIN code, they have an option to set up FaceID at the iPad Deluxe HCM. They will need to first enter their PIN code, then follow the steps to set up FaceID. It's really easy!
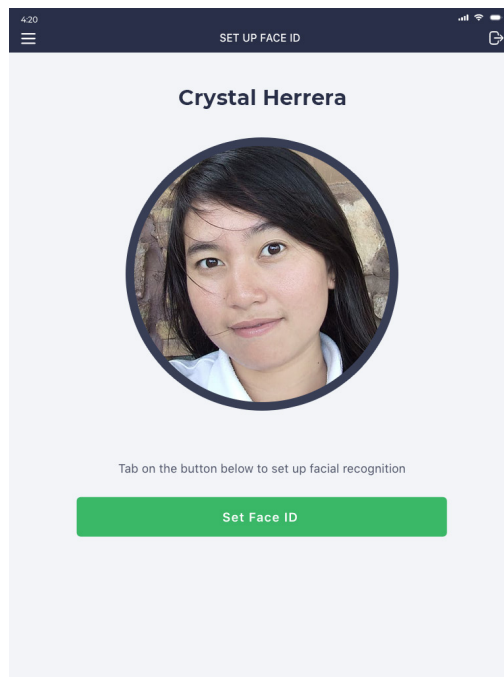
Troubleshooting and Connectivity Tips

Using the iPad Offline

1. Punch ins and outs will not transmit until iPad is connected. **Note** - Because punch ins/outs do not transmit to T&A server while iPad is offline, supervisors may get notifications that their employees have not logged in or out

2. Connect the iPad to the Wi-Fi at least once a day and allow at least 5 minutes for iPad to finish syncing.

3. To check if all punches have been synced, open the **"Clock App"**, click the **"Clock Status"** icon in the bottom-most part of the screen. A window will pop-up showing the number of synced and unsynced punches.

4. To confirm that the iPad is online, start-up Safari and do a search or go to a news site.

5. **Ideally, the iPad timeclock should be online at all times for best results.**

6. Make sure to join the strongest internet connection.
   "Settings > Wi-Fi > "I" icon on the Wi-Fi Network with strongest signal > Auto-Join"

Connectivity Problems - Tips

1. Turn off connectivity, turn back on **(Settings > Airplane mode, turn on, then off again)**

2. Go to **"Settings > Wi-Fi"**. Ensure you are connected to the strongest network

3. Connect to the Wi-Fi - check connectivity by opening a browser and going doing different searches.

4. Ping the IP address of the iPad from a computer.

Lock Down iPad Using Kiosk Mode

To lock down the time clock app on your iPad and put it into **"Kiosk Mode"** you will need to do the following:

1. Go to **"Settings > General > Accessibility > Guided Access"**.

2. Enable the **"Guided Access"** slider.

3. Tap **"Passcode Settings"** and **"Set Guided Access Passcode"**. Keep the **"Touch ID"** option as **"disabled"** in order to be able to exit the **"Kiosk Mode"** by anyone who knows the passcode.
   Note: This passcode will be needed to exit **"Kiosk Mode"**

4. Next, launch the **"Time Clock"** app. While the app is open, quickly press the **"Home"** button three times.

5. Tap **"Start"** in the top right corner of your screen when you're ready.

While in Guided Access mode, the iPad's screen won't turn off. It will remain on and unlocked for anyone to use it. Please keep the iPad plugged in.

To activate Sleep/Wake option,

1. After Step 4, click **"Options"** tan in the lower left of the screen.

2. Enable **"Sleep/Wake"**.

This will allow anyone to turn on/off the iPad's screen using its switch.