

**Heartland**

# Heartland Time

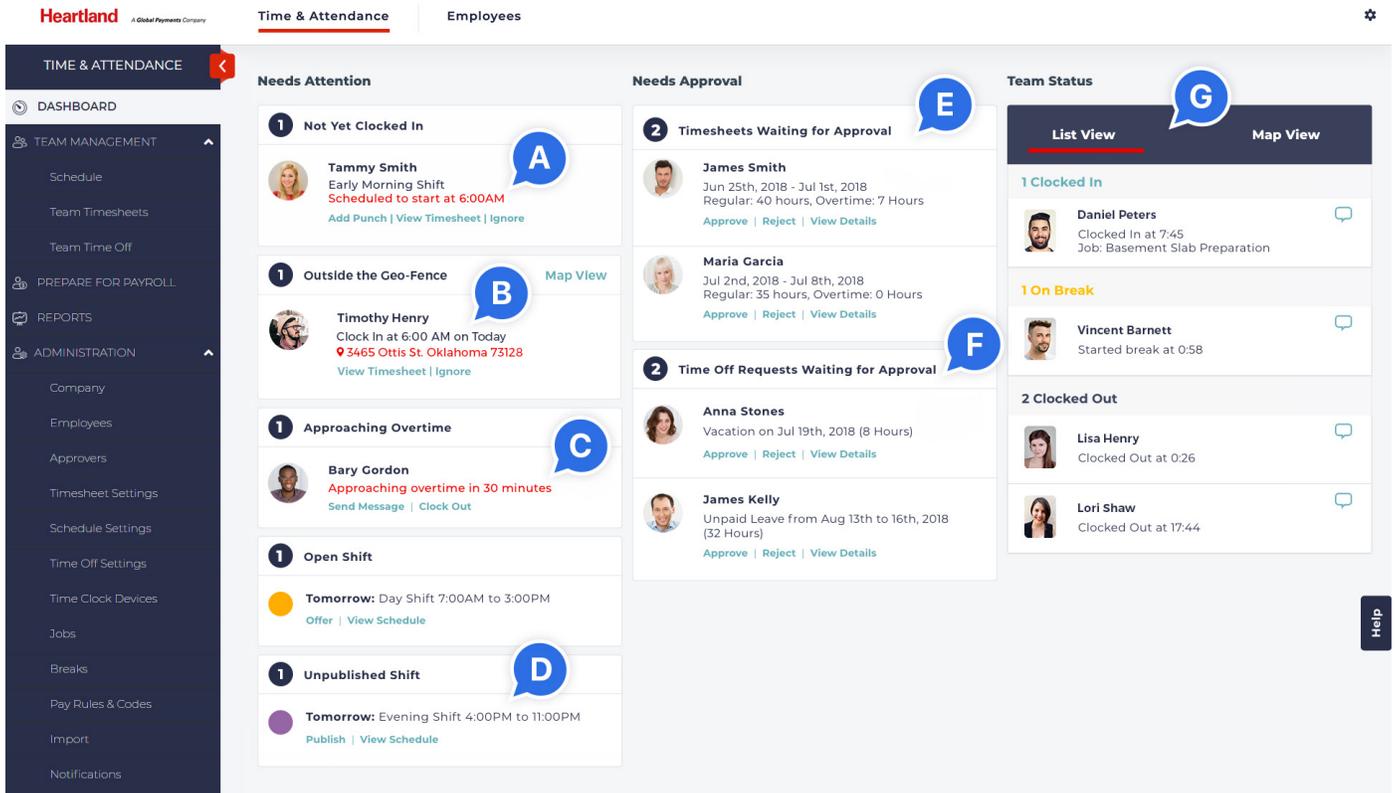
Quick Start Guide



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### 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

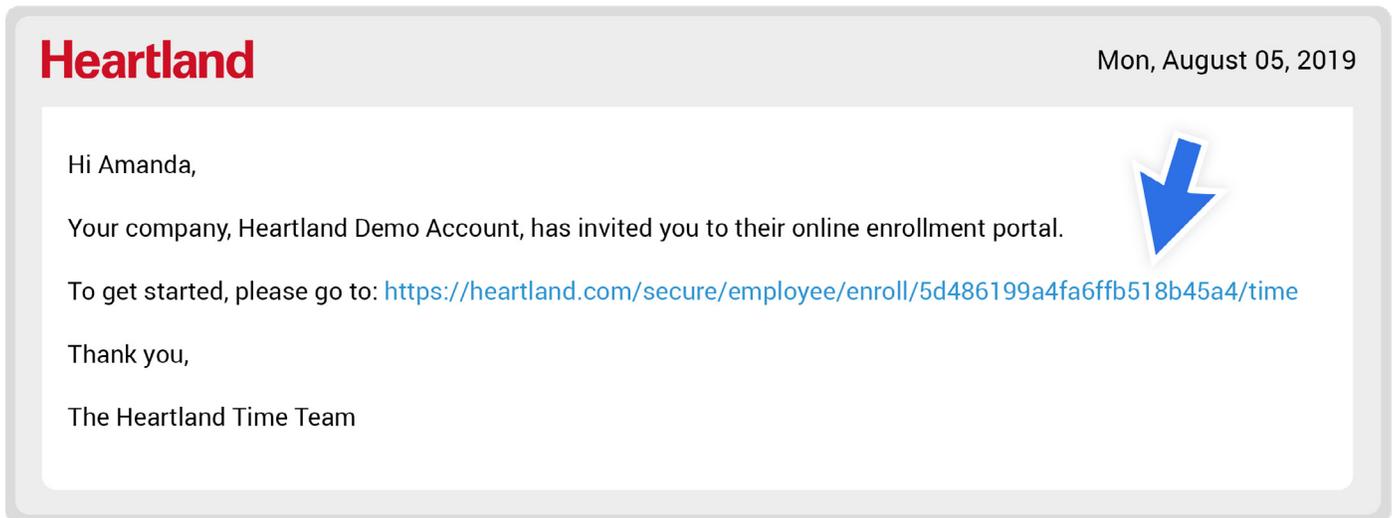
- E. Will show and let you approve or reject time sheets.
- F. Will show and let you approve or reject time off requests.

#### 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 including user name, password and method of accessing the Heartland Time system. Employees would have received an email from Heartland Time containing a link to create an account, similar to this sample email.



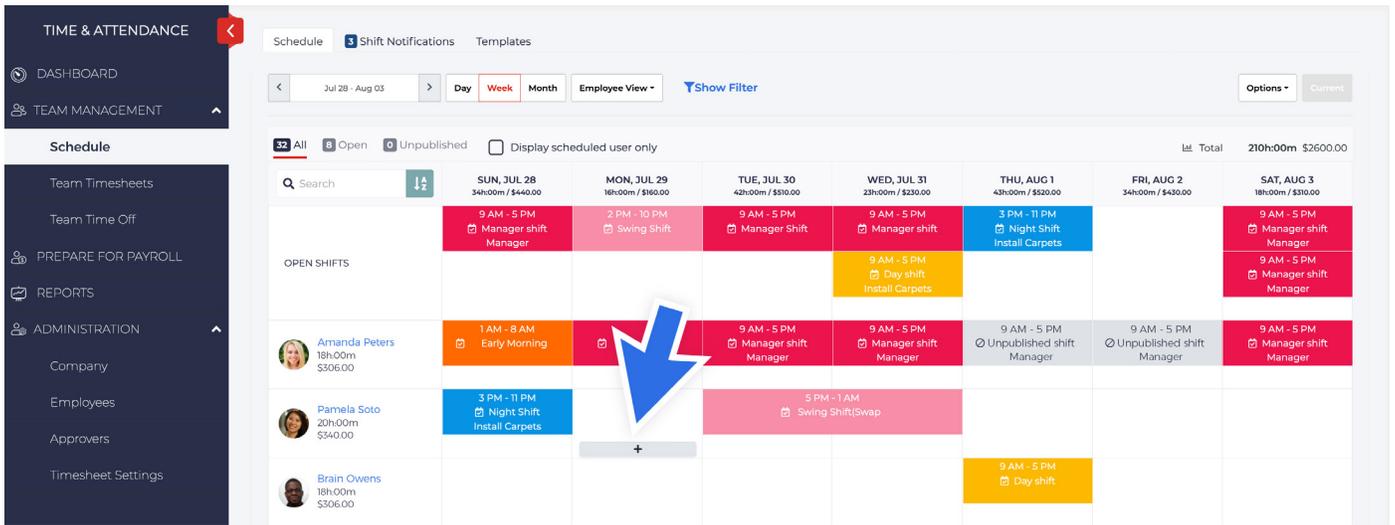
Once they click on the link, it will take them to a page where employees can create an account and choose their username and password. Employees can then use any of the three methods selected by the employer.

 <p><b>iPad</b></p> <p>Employees can login using their Six-Digit PIN Code that will be provided by the Employer or via facial recognition.</p>	 <p><b>Mobile App</b></p> <p>Employees should download the HeartlandTime App, and login using the email address and password they created using the registration link sent to them.</p>	 <p><b>Computer / Laptop</b></p> <p>Employees can log into <a href="http://www.heartlandtime.com">www.heartlandtime.com</a></p>
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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: **StartTime, End Time, and Color (1-3)** are required. **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.

**Create Schedule** ✕

Shift Add Unavailability Time Off

START DATE(UTC) ● Mandatory  
● Optional

07/28/2019

TEMPLATE: None

START TIME: 01:30 AM 1

END TIME: 02:30 AM 2

TIME ZONE: Eastern Daylight Time (GMT-4)

SHIFT NAME:  4

JOBS:  5

LOCATION:  6

COLOR: 3  #FF6900

BREAK:  START TIME:  END TIME:  TYPE:

7 Add Break

SHIFT NOTES:

8 Repeat

Save as template

Close Create

## How to Create a Schedule Using a 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 the 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  
09:00 AM

END TIME  
03:00 PM

SHIFT NAME  
Standard

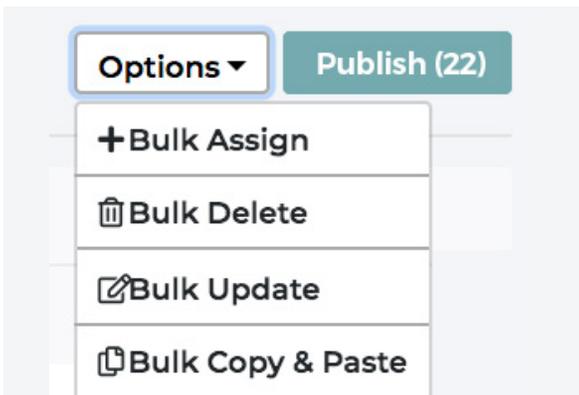
Jobs  
Please select the job

Location  
Unselected

Color  
#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 **+** button. Once in the pop-up, select the template you just created. Click **Create** button.



## 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:

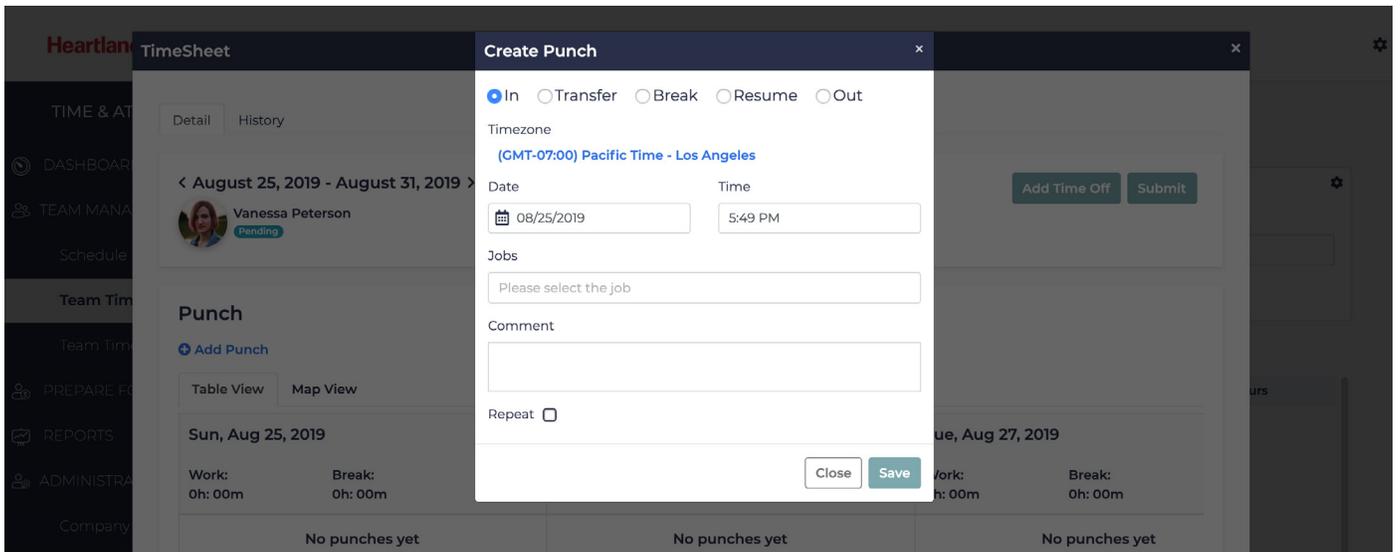
- A. Date range the timesheet period desired and the system will display all relevant timesheets to that period.
- B. Search for a specific employee’s timesheet for quicker results.
- C. Filter the timesheets by **Department, Work Location, Employment Type, or Employment Status** (active, terminated).
- 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.

The screenshot shows the 'All Timesheets' section in the Heartland Time & Attendance system. The interface includes a left-hand navigation menu, a top navigation bar, and a main content area with a search and filter section above a data table. Callouts A-F point to specific UI elements: A (date range), B (search), C (filter), D (bulk actions), E (status tabs), and F (gear icon).

Name	Approval Status	Timesheet Period	Scheduled Work Hours	Actual Work Hours	Overtime Hours	Overtime Pay	Meal Bre
Jane Brown	Not Submitted	07/28/2019 - 08/03/2019	1.00	0.00	0.00	\$0.00	0.00
Tom Bailly	Not Submitted	07/28/2019 - 08/03/2019	0.00	0.00	0.00	\$0.00	0.00
Maria Garcia	Not Submitted	07/28/2019 - 08/03/2019	0.00	0.00	0.00	\$0.00	0.00
Anna Stones	Not Submitted	07/28/2019 - 08/03/2019	16.50	0.00	0.00	\$0.00	0.00
Bary Cordon	Not Submitted	07/28/2019 - 08/03/2019	8.00	0.00	0.00	\$0.00	0.00
Tam Perez	Not Submitted	07/28/2019 - 08/03/2019	0.00	0.00	0.00	\$0.00	0.00
Katie Ling	Not Submitted	07/28/2019 - 08/03/2019	48.00	0.00	0.00	\$0.00	0.00
John Diago	Not Submitted	07/28/2019 - 08/03/2019	0.00	0.00	0.00	\$0.00	0.00
James Kelly	Not Submitted	07/28/2019 - 08/03/2019	0.00	0.00	0.00	\$0.00	0.00
Yamira Sortigo	Not Submitted	07/28/2019 - 08/03/2019	0.00	0.00	0.00	\$0.00	0.00
Harry Mason	Not Submitted	07/28/2019 - 08/03/2019	0.00	0.00	0.00	\$0.00	0.00
Jack Liam	Not Submitted	07/28/2019 - 08/03/2019	0.00	0.00	0.00	\$0.00	0.00
Maria Rodriguez	Not Submitted	07/28/2019 - 08/03/2019	22.00	34.50	2.50	\$37.50	0.00
James Johnson	Not Submitted	07/28/2019 - 08/03/2019	0.00	0.00	0.00	\$0.00	0.00
Vanessa Peterson	Not Submitted	07/28/2019 - 08/03/2019	40.00	0.89	0.00	\$0.00	0.00
Armanda Clarens	Not Submitted	07/28/2019 - 08/03/2019	55.00	4.14	0.00	\$0.00	0.00
Michael Smith	Not Submitted	07/28/2019 - 08/03/2019	16.00	49.00	12.50	\$187.50	0.00
Anna Stones	Rejected	07/21/2019 - 07/27/2019	13.00	0.00	0.00	\$0.00	0.00
Harry Mason	Waiting for Approval	07/21/2019 - 07/27/2019	32.00	12.00	0.00	\$0.00	0.00
Yamira Sortigo	Approved	07/21/2019 - 07/27/2019	0.00	0.00	0.00	\$0.00	0.00
<b>Total</b>			<b>251.50</b>	<b>100.53</b>	<b>15.00</b>	<b>\$225.00</b>	<b>0.00</b>

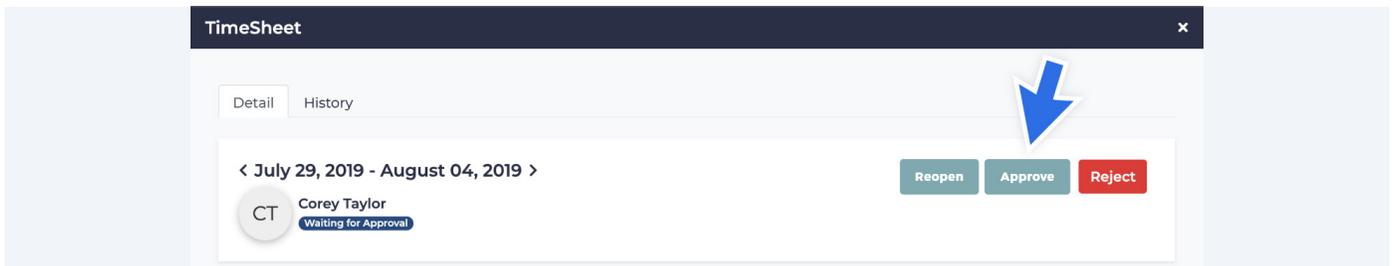
### How to Edit a Timesheet

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/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.

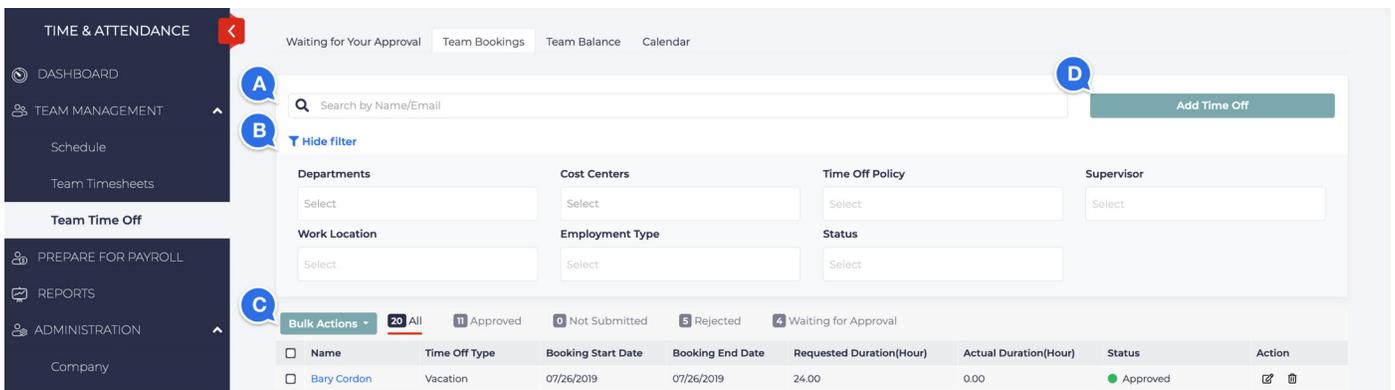


# Time Off

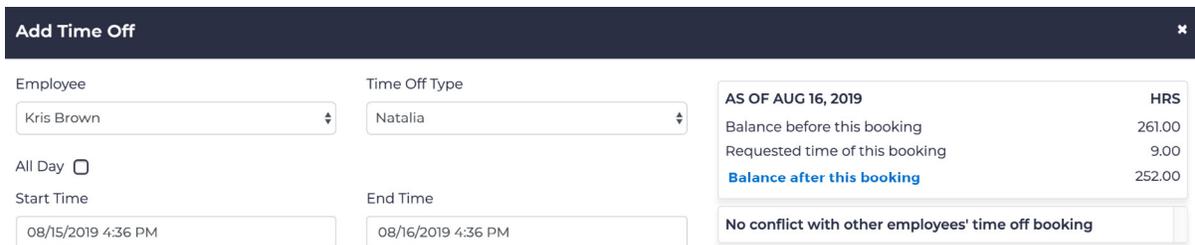
## 1. Team Time Off Section

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 Action Section:** A user can **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 see their entire team’s current time-off balances for all assigned policies at a glance.

## 3. Calendar Section

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

## Prepare for Payroll

The **Prepare for Payroll Section** is where you will run your payroll. Here you will be able to: select the timesheets that you would like to run the payroll for; review and edit those timesheets if needed; and send all of the employee timesheet data to Heartland Payroll.

## Pay Run Summary Section

The **Pay Run Summary Section** provides you with the ability to view any previously run payrolls, as well as delete pay runs that are no longer needed. You will also be able to filter the Pay Runs by status (draft, finalized, or all).

To start a new **Pay Run**,

1. Go to **Prepare for Payroll** section.
2. Click the **“Start New Pay Run”** button in the top right corner.
3. Check **Date Range** you’ll be running the payroll for.
4. Choose **Employee’s Timesheet** you’ll be running the payroll for.
5. Click the **Next** button.

The screenshot shows the 'Pay Run Summary' page. On the left is a navigation sidebar with categories: TIME & ATTENDANCE, PREPARE FOR PAYROLL, REPORTS, and ADMINISTRATION. The main content area has a 'Pay Run Status' dropdown menu set to 'All' and a 'Start New Pay Run' button. Below is a table listing various pay runs with columns for Run at, Period, Status, Number of employees, Total hours, Total amount, and Action.

Run at	Period	Status	Number of employees	Total hours	Total amount	Action
Sep 03, 2019 11:08:19 PM	Aug 20, 2019 - Sep 03, 2019	Draft	1	58.00	\$660.00	🗑️
Sep 03, 2019 11:06:12 PM	Jun 29, 2019 - Jul 05, 2019	Draft	4	193.00	\$2055.00	🗑️
Aug 22, 2019 02:21:54 PM	Aug 08, 2019 - Aug 22, 2019	Draft	2	0.00	\$0.00	🗑️
Aug 13, 2019 06:30:24 AM	Jul 29, 2019 - Aug 12, 2019	Draft	1	61.00	\$610.00	🗑️
Aug 08, 2019 07:24:42 AM	Aug 31, 2019 - Sep 06, 2019	Final	2	112.00	\$1240.00	🗑️
Aug 07, 2019 01:57:04 AM	Jul 23, 2019 - Aug 06, 2019	Draft	1	0.00	\$0.00	🗑️
Aug 06, 2019 11:22:12 PM	Jul 23, 2019 - Aug 06, 2019	Draft	1	0.00	\$0.00	🗑️
Aug 06, 2019 10:48:54 AM	Jul 23, 2019 - Aug 06, 2019	Draft	1	0.00	\$0.00	🗑️
Aug 06, 2019 03:04:15 AM	Jul 22, 2019 - Aug 05, 2019	Draft	1	48.00	\$480.00	🗑️
Aug 06, 2019 03:02:42 AM	Jul 22, 2019 - Aug 05, 2019	Draft	1	0.00	\$0.00	🗑️
Aug 05, 2019 12:30:00 PM	Jul 22, 2019 - Aug 05, 2019	Draft	1	0.00	\$0.00	🗑️

The screenshot shows the 'Employee Pay Data to Process' page. It includes a 'Date' range selector (Aug 01, 2019 - Aug 15, 2019), a 'Display options' dropdown (Per sheet), and a search bar for employees. Below is a table listing employees with columns for Name, Pay Run Status, Approval Status, Timesheet Period, Holiday Amount, and Holiday Premium Hours.

Name	Pay Run Status	Approval Status	Timesheet Period	Holiday Amount	Holiday Premium Hours
David Dralman		● Not Submitted	Jul 01, 2019 - Sep 01, 2019	-	3.92
David Dralman		● Not Submitted	Jul 08, 2019 - Aug 31, 2019	-	-
David Dralman		● Not Submitted	Jul 15, 2019 - Aug 31, 2019	-	-
Ethan TNA		● Not Submitted	Jul 16, 2019 - Aug 01, 2019	-	-
William TNA		● Not Submitted	Jul 16, 2019 - Aug 01, 2019	-	-
John Bard		● Not Submitted	Jul 16, 2019 - Aug 01, 2019	-	-
Jason Cutler		● Approved	Jul 16, 2019 - Aug 01, 2019	-	-
TNA Supervisor		● Not Submitted	Jul 16, 2019 - Aug 01, 2019	-	-
Randy TNA		● Not Submitted	Jul 17, 2019 - Aug 01, 2019	-	-

6. If there are errors, warnings or exceptions, the system will present the user with a **“Resolve Pay Run Issues”** window. The system will give options to fix or ignore these exceptions (ex: Timesheet has missing punches or the timesheet is unapproved etc.). Click on the **Fix** or **Ignore** buttons to resolve all warnings and exceptions.

### Resolving Pay Run Issues

#### Resolve Timesheets Exceptions

You need to resolve the following employee timesheet errors before creating a Draft.

#### Exceptions:

<input type="checkbox"/>	Missing Punch Timesheets	
<input type="checkbox"/>	David Draiman (2019-07-01 - 2019-09-01)	<a href="#">Fix</a>
<input type="checkbox"/>	Unapproved Timesheets	
<input type="checkbox"/>	David Draiman (2019-07-01 - 2019-09-01)	<a href="#">Fix</a>

### Resolving Pay Run Issues

#### Resolve Timesheets Exceptions

You need to resolve the following employee timesheet errors before creating a Draft.

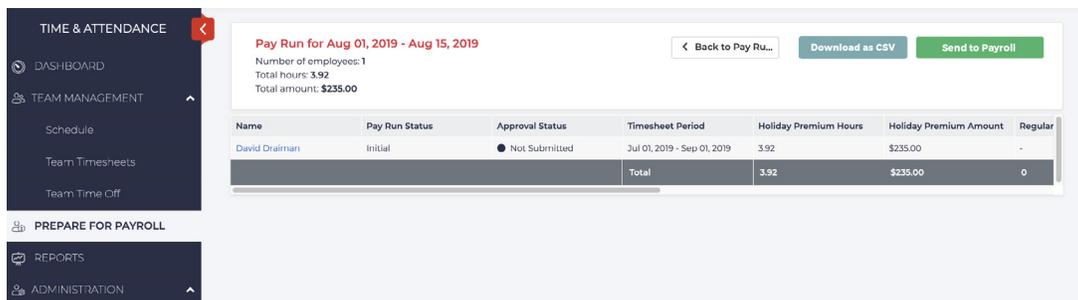
#### Exceptions:

1 employee timesheet selected [Cancel](#) [Ignore](#)

<input type="checkbox"/>	Missing Punch Timesheets	
<input checked="" type="checkbox"/>	David Draiman (2019-07-01 - 2019-09-01)	<a href="#">Fix</a>

7. Once all exceptions have been fixed, click the **Next** button.

8. You will then be routed to the final step which is the **Pay Run Totals**. In this section, you will be able to review the summary of hours and amount per employee you will pay for. The user is also given an option to download a CSV file with pay run details. Once everything is reviewed, the user can select **“Send to Payroll”** button to submit payroll data to Heartland Payroll.



### Reports

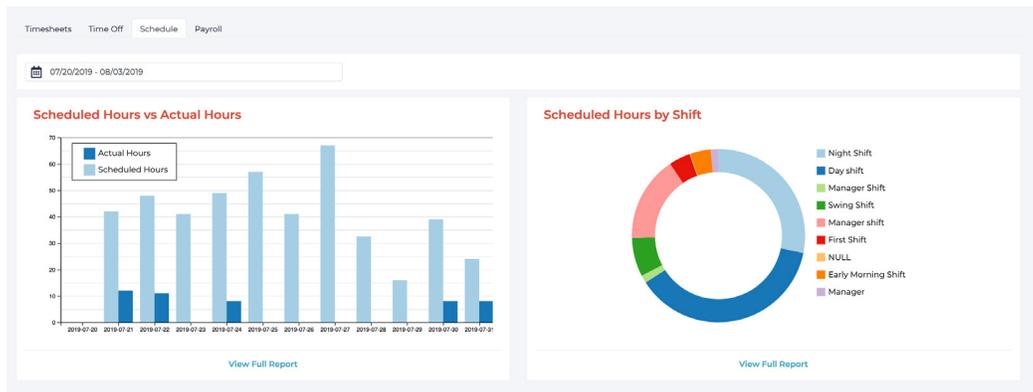
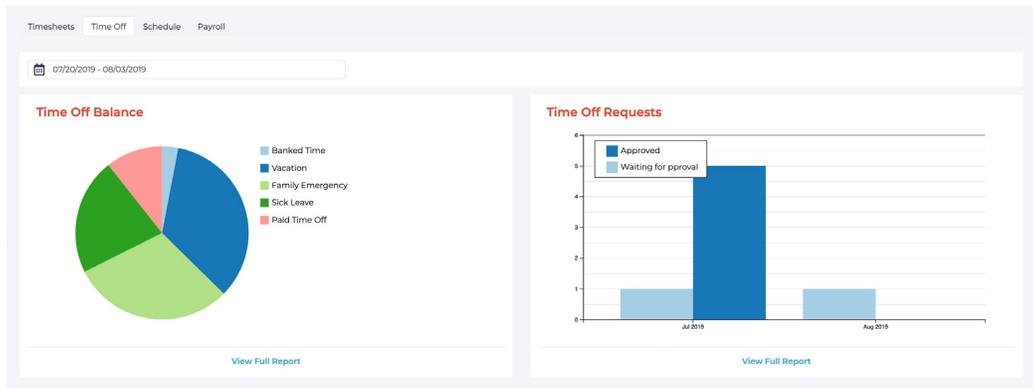
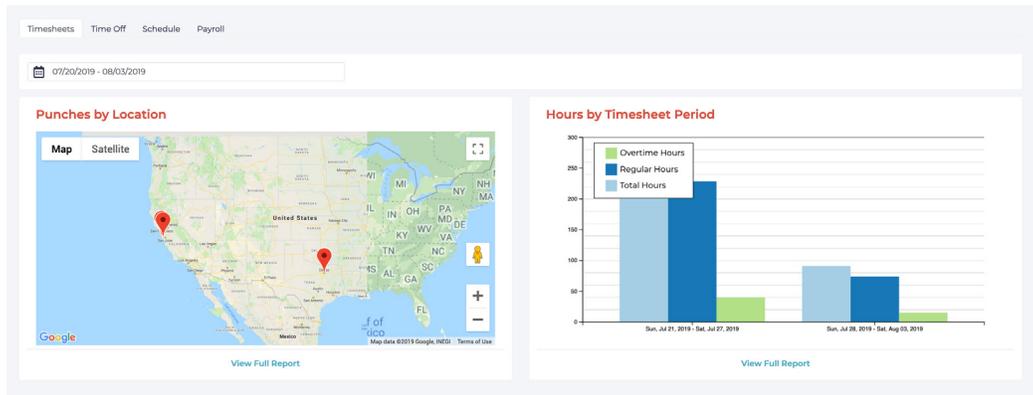
The **Reports Section** will let you **View** or **Download** many reports as CSV files including:

**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.

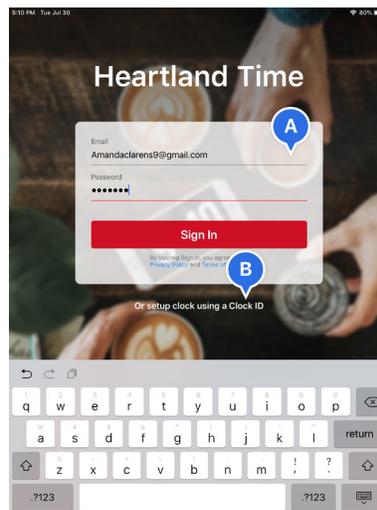


### iPad Prerequisite

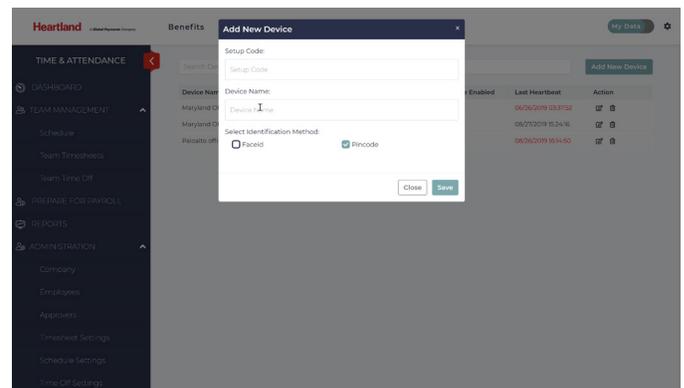
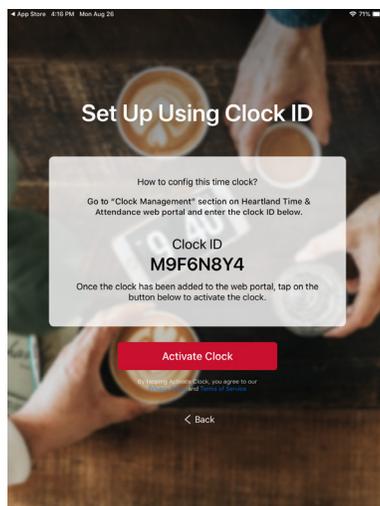
- Generation 2 or later
- 16 GB of minimum storage
- Any size iPad (ex: iPad, iPad Mini, iPad Air, iPad Pro)
- iOS software version 12 or later

### How to set-up the iPad

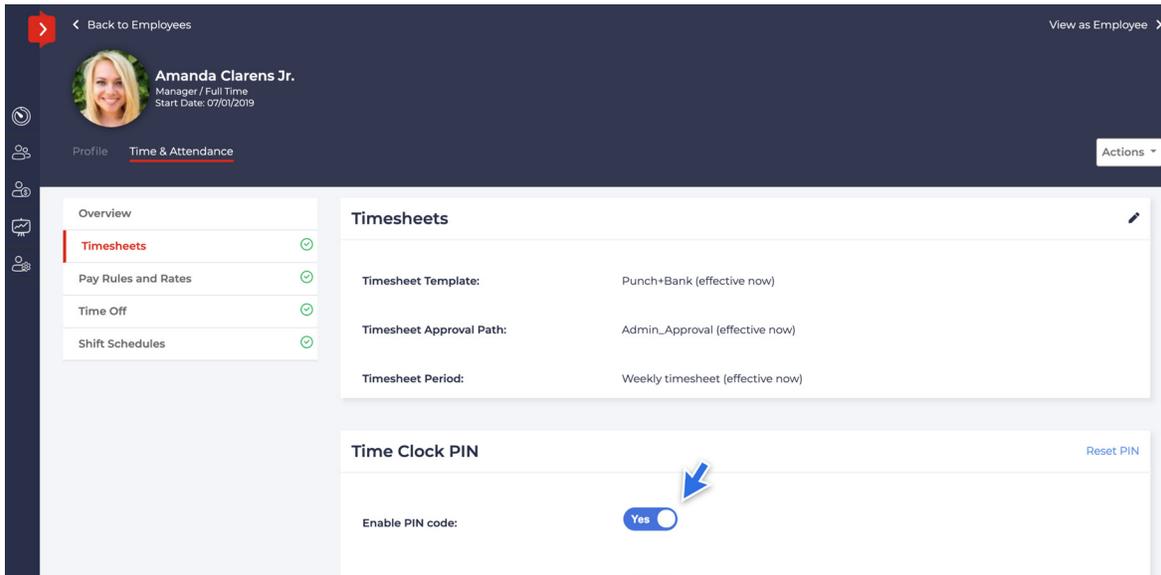
1. Download the **“Heartland Time Clock”** app from the App Store.
2. There are two ways in setting up the time clock:
  - A. Log into the app using the account owner credentials.



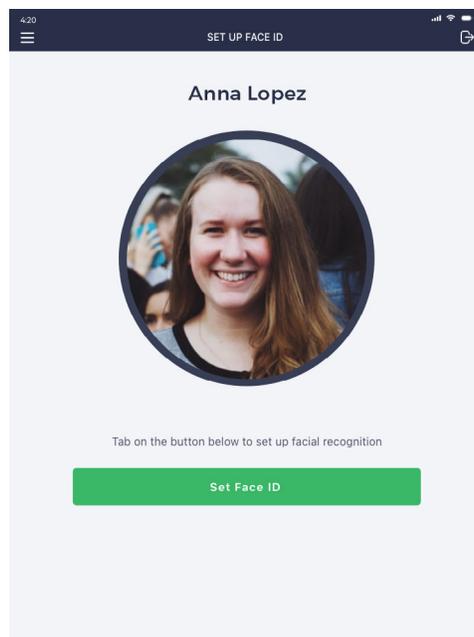
- B. Get the **Clock ID** from the app and put it in the **Time Clock Devices Section** in the **Time and Attendance** website. **Administration > Time Clock Devices > Add New Device**



3. Choose from the two options above. Then choose whether employees will clock in via **PIN Code** or **FaceID**. **Six-Digit 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 their **Six-Digit** individual **PIN Code**, they have an option to set up **FaceID** on the **iPad Heartland Time App**. 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 **Time & Attendance** 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 the browser 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 and 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 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** tab 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.