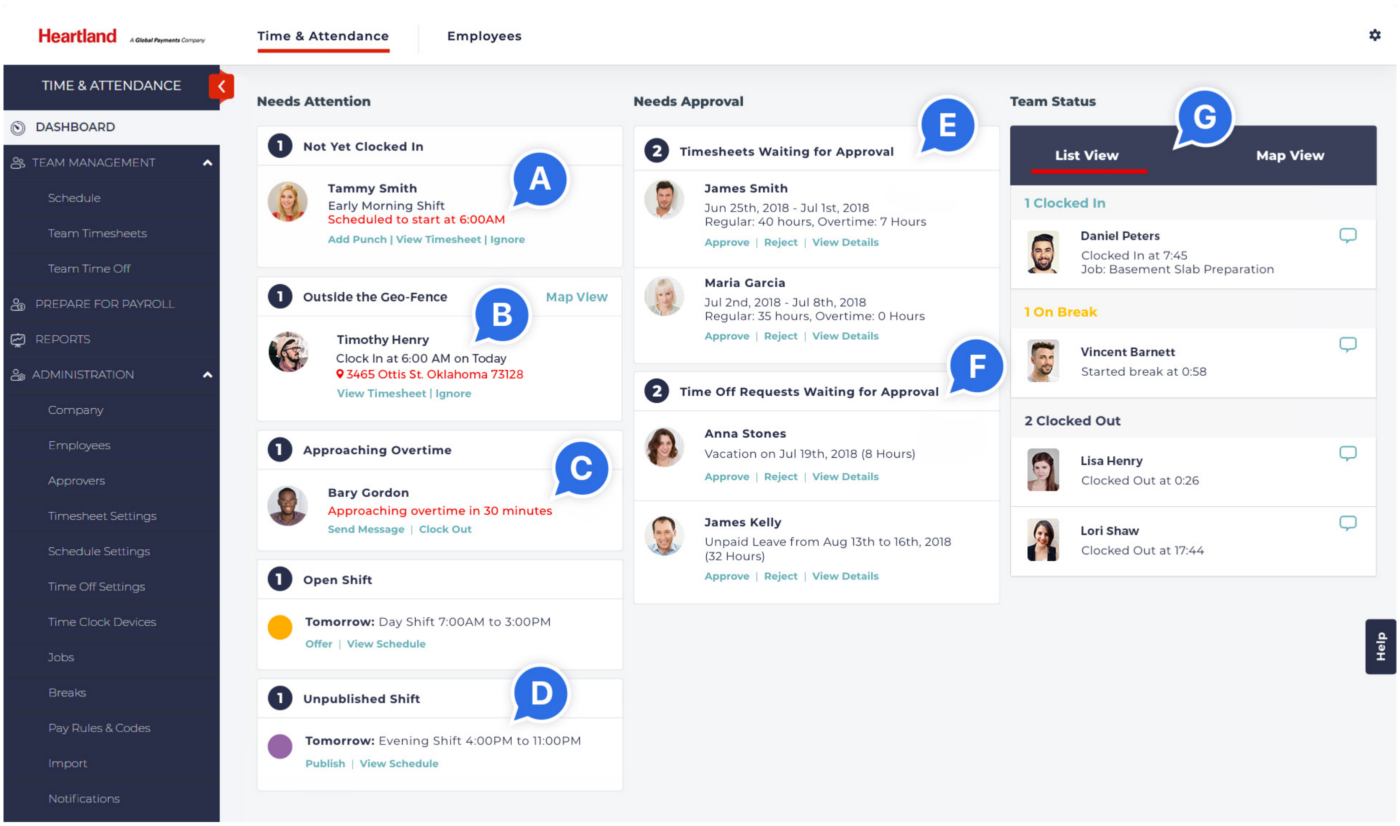
Heartland

Heartland Time

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 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.

Heartland

Mon, August 05, 2019

Hi Amanda,

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

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

Thank you,

The Heartland Time Team

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.

iPad

Employees can login using their Six-Digit PIN Code that will be provided by the Employer or via facial recognition.

Mobile App

Employees should download the Heartland Time App, and login using the email address and password they created using the registration link sent to them.

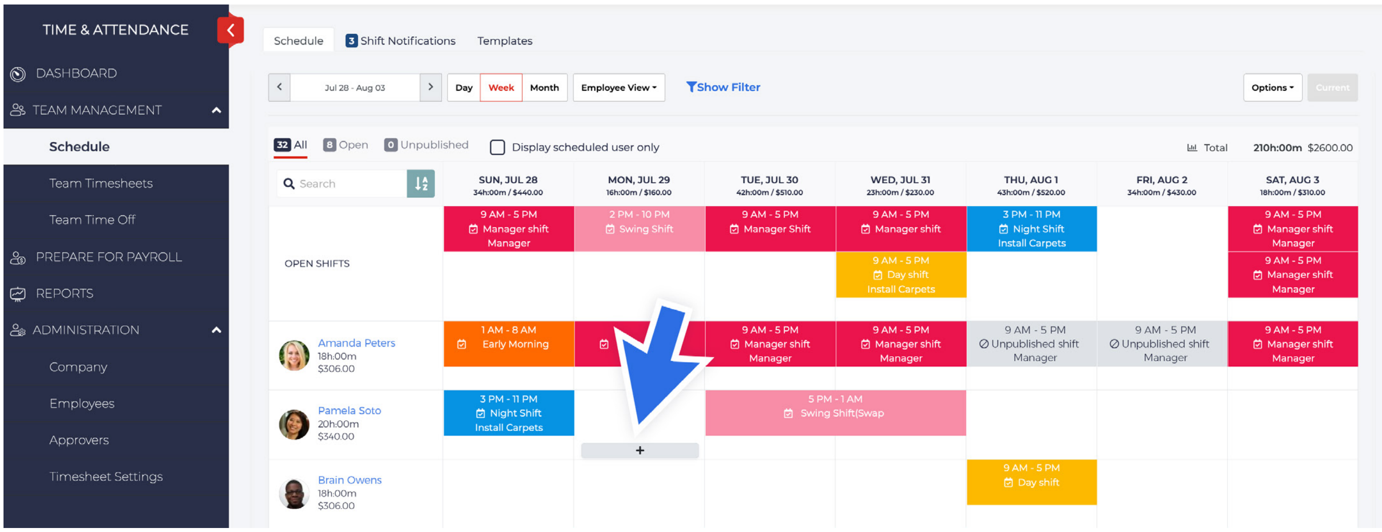
Computer / Laptop

Employees can log into **www.heartlandtime.com**

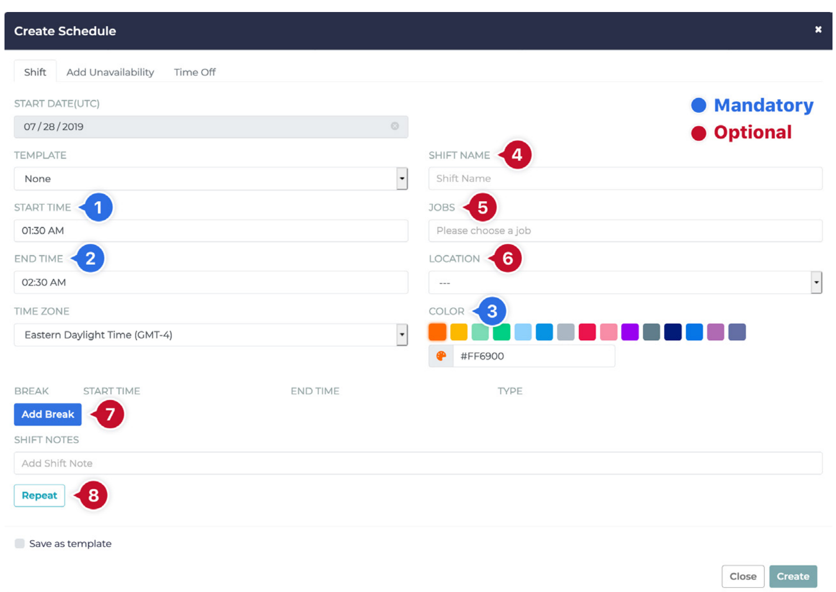
Employees can view the schedule you create for them by logging into their account using a computer/laptop or mobile app. They can then enter time worked, submit their timesheets, drop or swap shifts and request time off.

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.

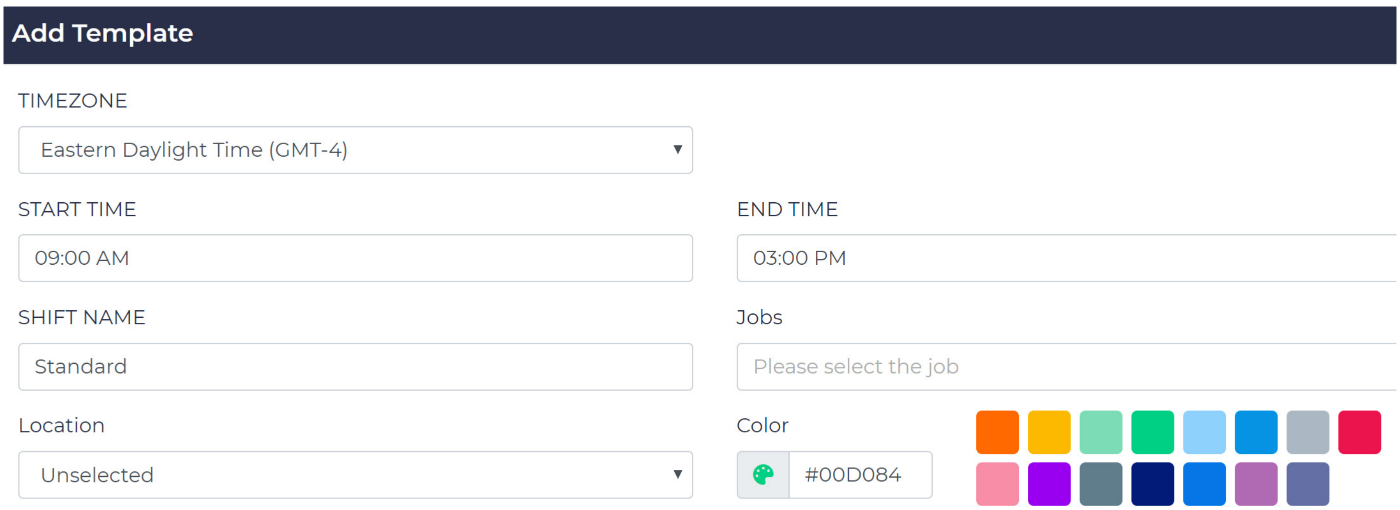


- A **Create Schedule** window should pop-up. Fill out all required information: **Start Time, End Time, and Color (1-3)** are required. **Shift Name, Job, Location, Add Break, and Repeat (4-8)** are optional Click **Create**. A box with a colored outline will appear on the schedule page.
- Once done, click **Publish** and the employees will be notified of their schedule. The schedule box will change to a solid color.

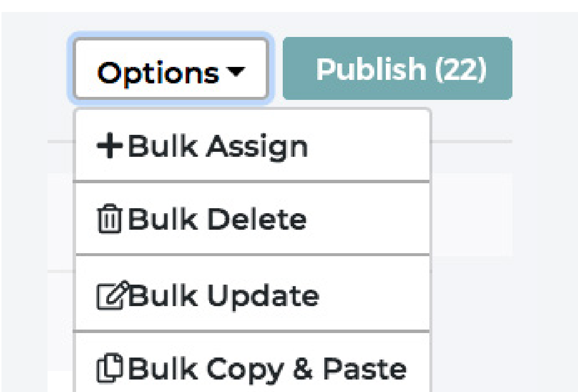


How to Create a Schedule Using a Template

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**.



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.

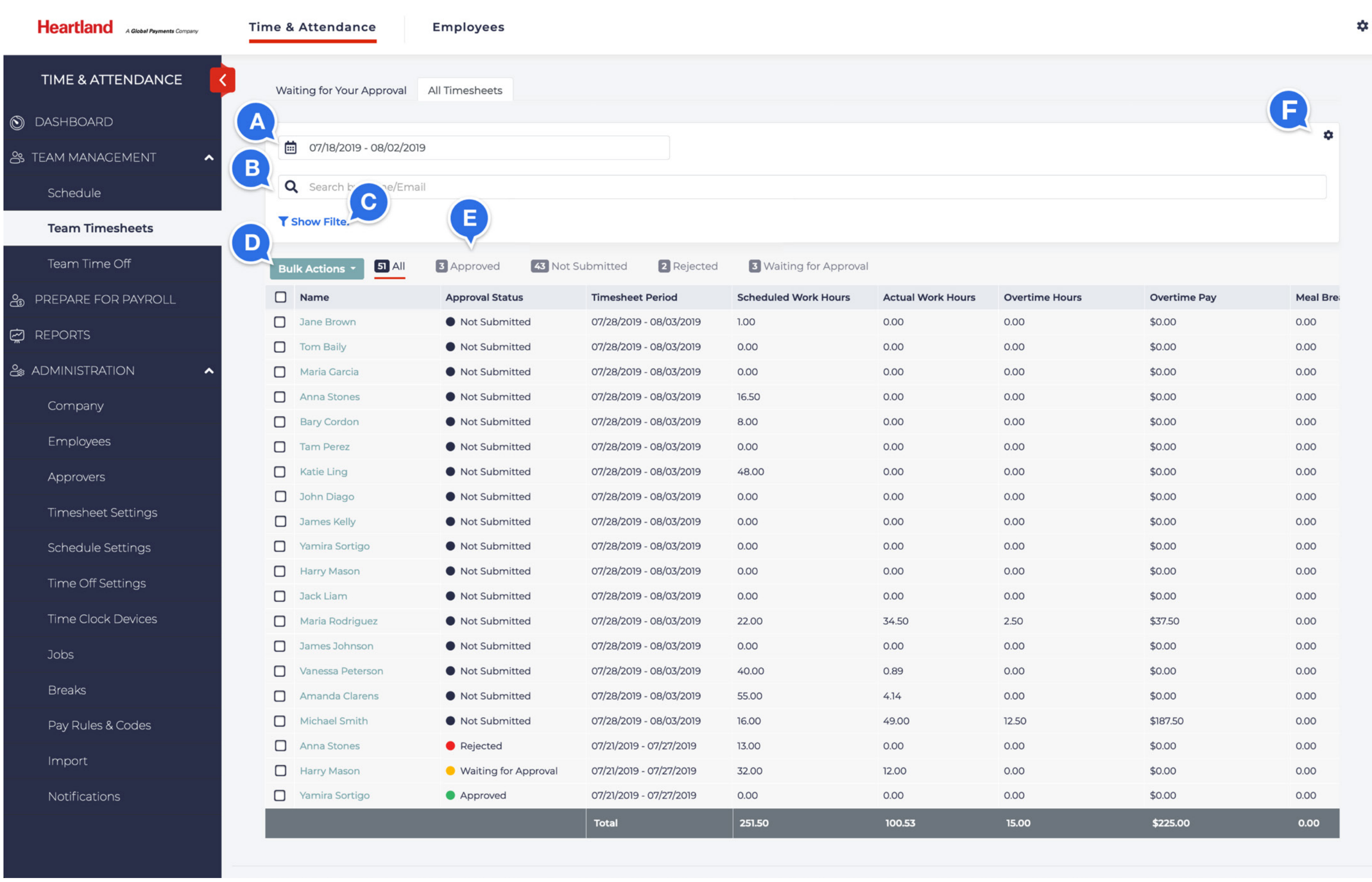
B. Search for a specific employee's timesheet for quicker results.

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.

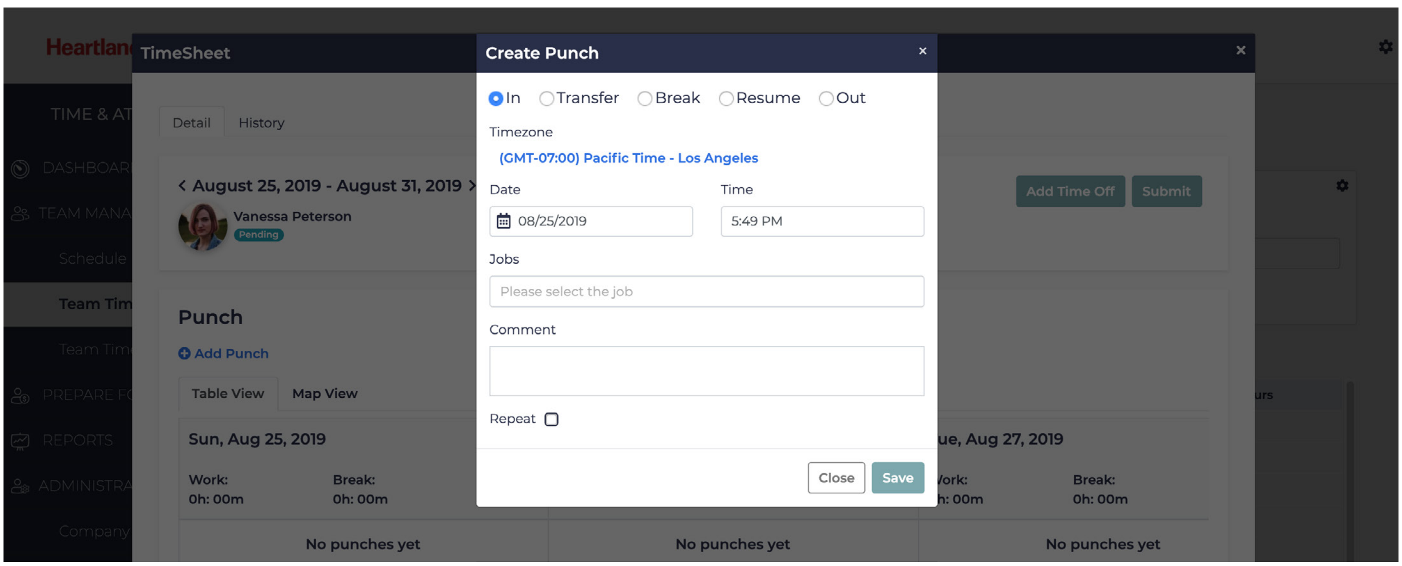
E. View timesheets that are: **Approved, Not Submitted, Rejected, Waiting for Approval,** or **All Timesheets** in separate tabs.

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.



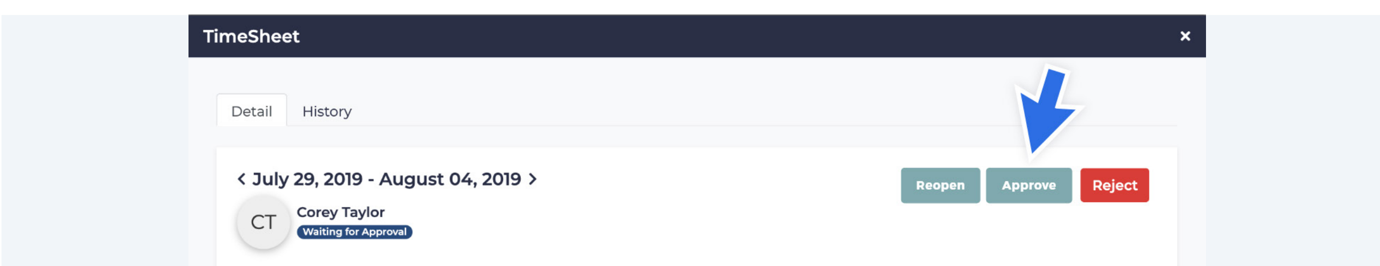
How to Edit a Timesheet

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.



A ***Global Payments*** *Company*

Time Off

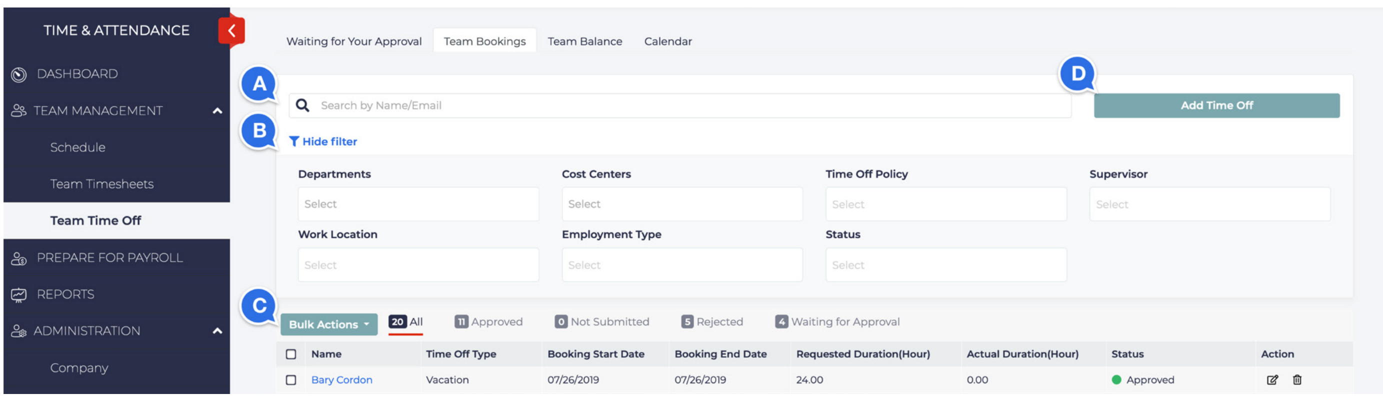
1. Team Time Off Section

In the **Team Time Off Bookings Section** a user can:

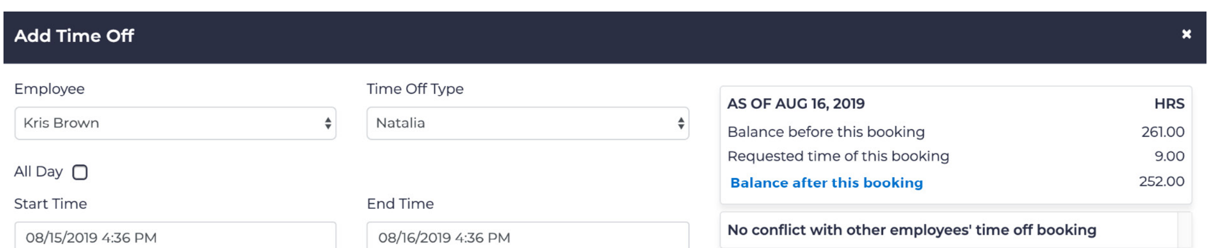
A. Search the time off requests submitted for approval by employee **Name**.

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

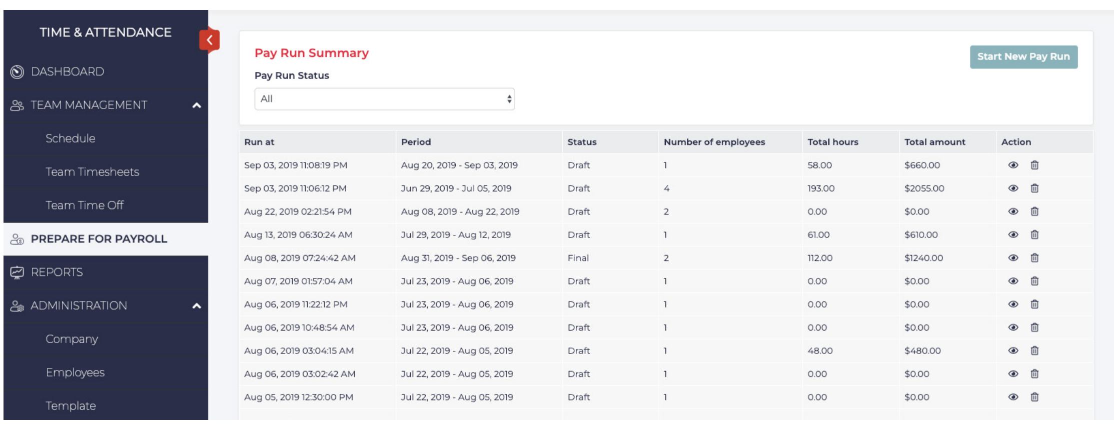
The **Prepare for Payroll Section** is where you will run your payroll. Here you will be able to: select the timesheets that you would like to run the payroll for; review and edit those timesheets if needed; and send all of the employee timesheet data to Heartland Payroll.

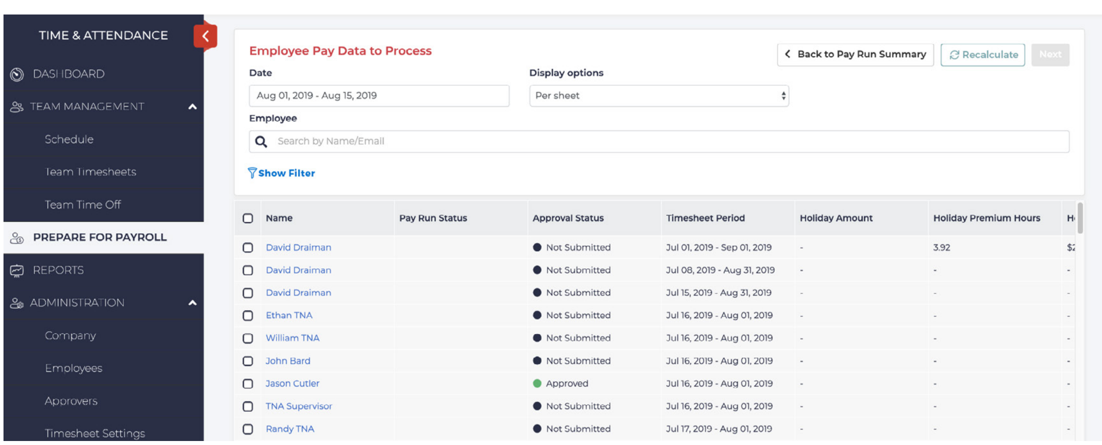
Pay Run Summary Section

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).

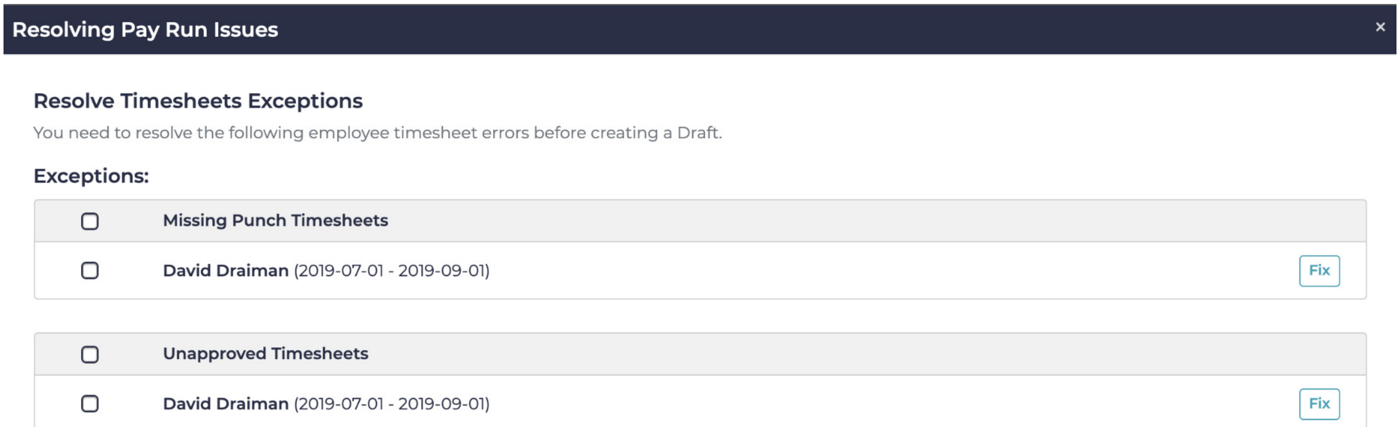
To start a new **Pay Run**,

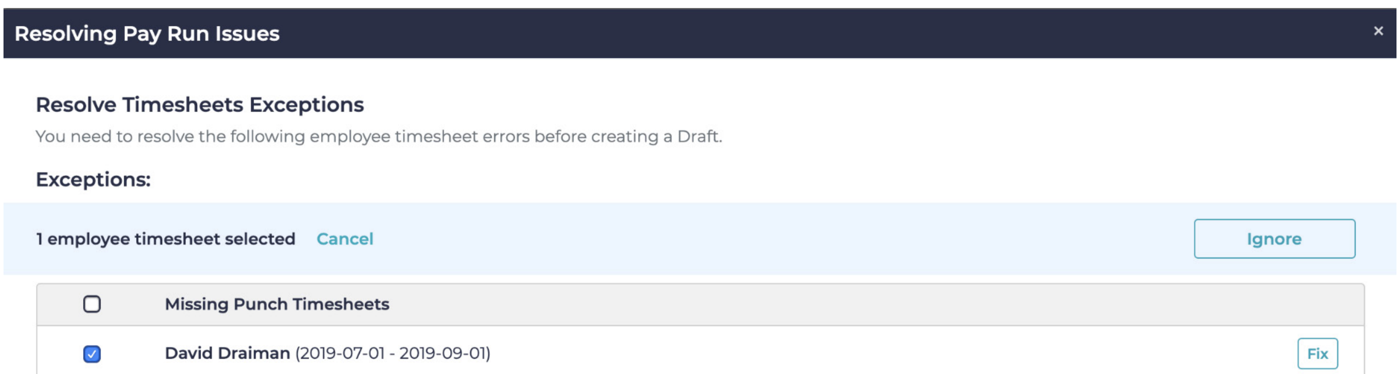
1. Go to **Prepare for Payroll** section.
2. Click the **"Start New Pay Run"** button in the top right corner.
3. Check **Date Range** you'll be running the payroll for.
4. Choose **Employee's Timesheet** you'll be running the payroll for.
5. Click the **Next** button.





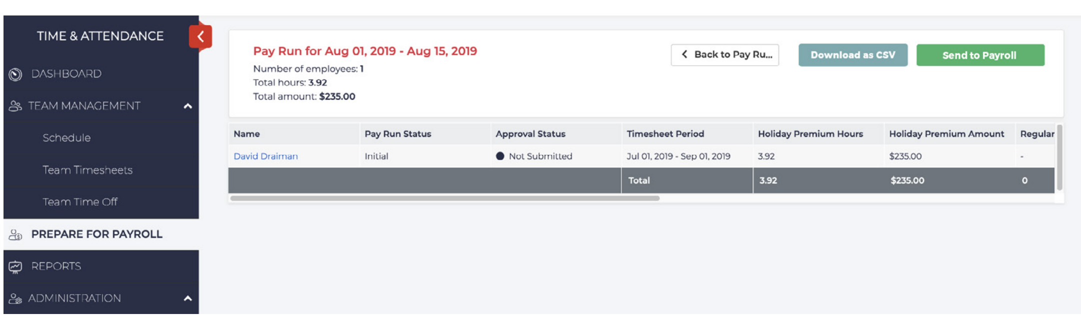
6. If there are errors, warnings or exceptions, the system will present the user with a **"Resolve Pay Run Issues"** window. The system will give options to fix or ignore these exceptions (ex: Timesheet has missing punches or the timesheet is unapproved etc.). Click on the **Fix** or **Ignore** buttons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





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

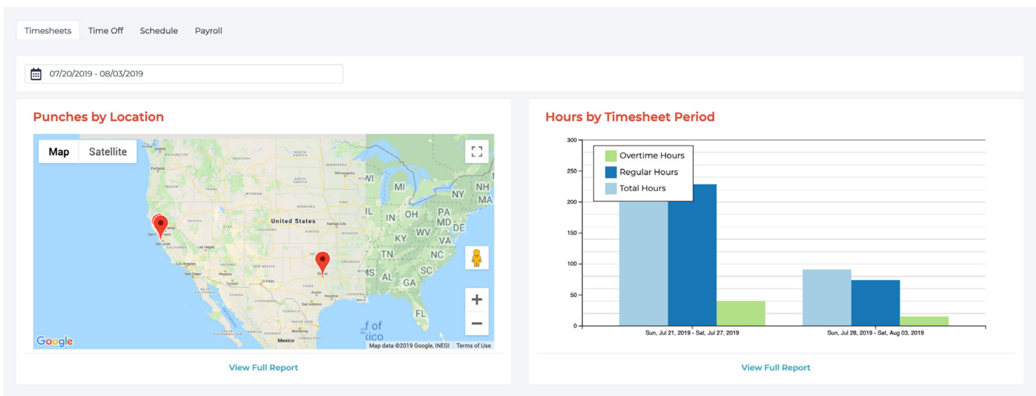
The **Reports Section** will let you **View** or **Download** many reports as CSV files including:

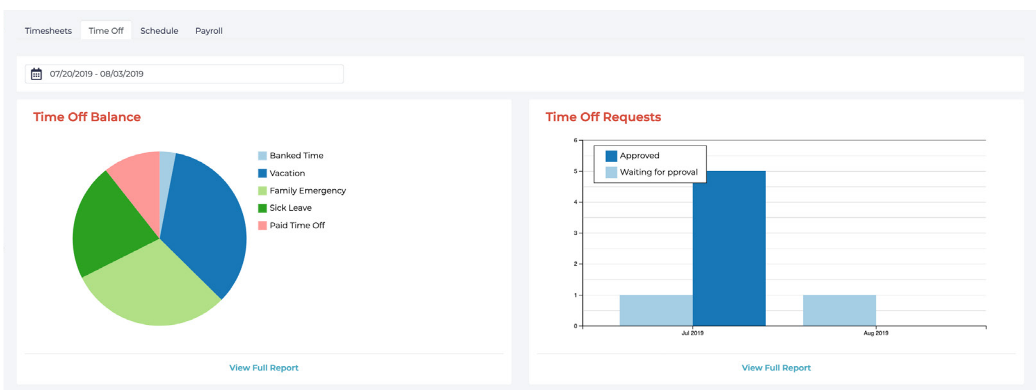
Timesheets: Punches by Location, Hours by Timesheet Period, Hours by Day, Punch Data.

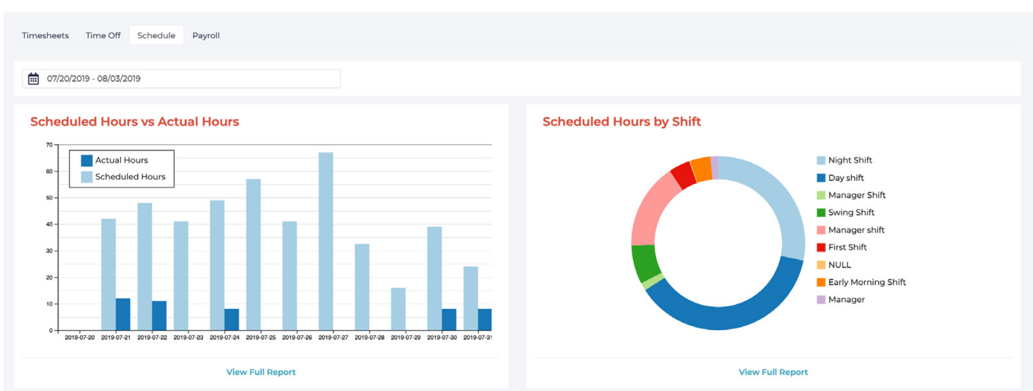
Time Off: Time Off Balance, Time Off Requests.

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

Payroll: Total Cost By Job.







iPad Prerequisite

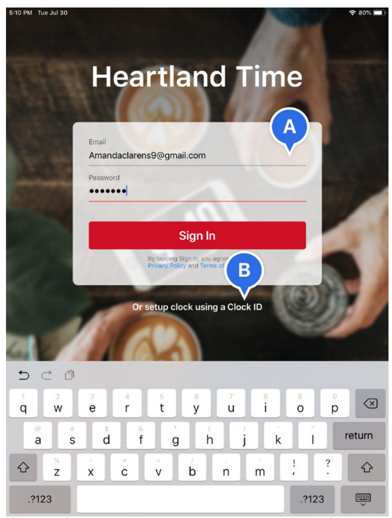
- Generation 2 or later
- 16 GB of minimum storage
- Any size iPad (ex: iPad, iPad Mini, iPad Air, iPad Pro)
- iOS software version 12 or later

How to set-up the iPad

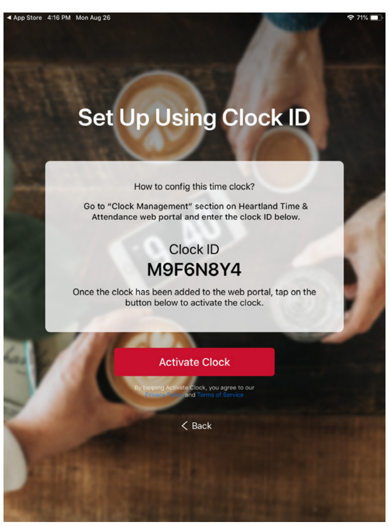
1. Download the **"Heartland Time Clock"** app from the App Store.

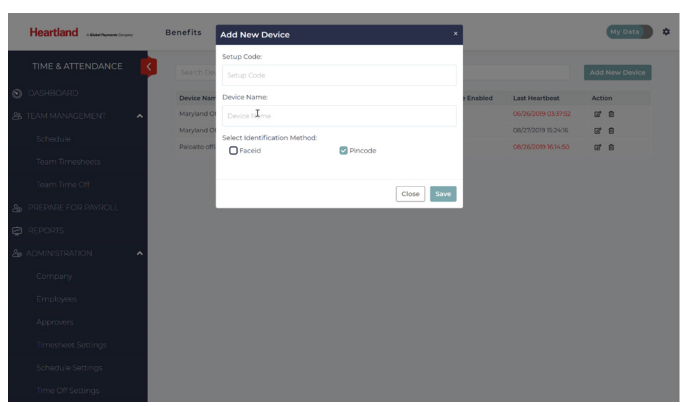
2. There are two ways in setting up the time clock:

A. Log into the app using the account owner credentials.

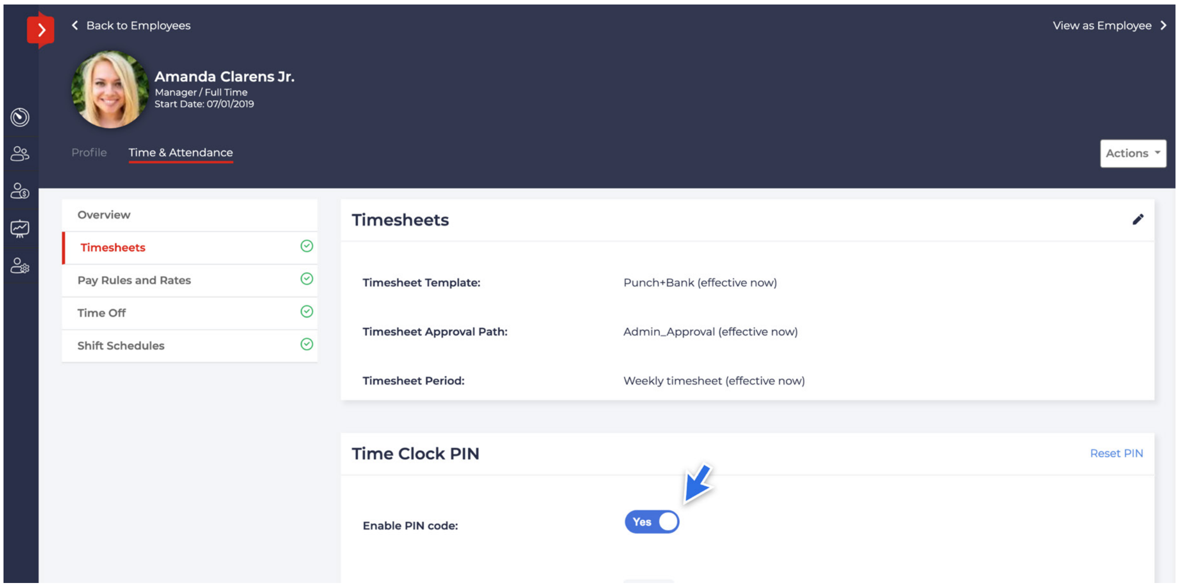


B. Get the **Clock ID** from the app and put it in the **Time Clock Devices Section** in the **Time and Attendance** website. **Administration > Time Clock Devices > Add New Device**

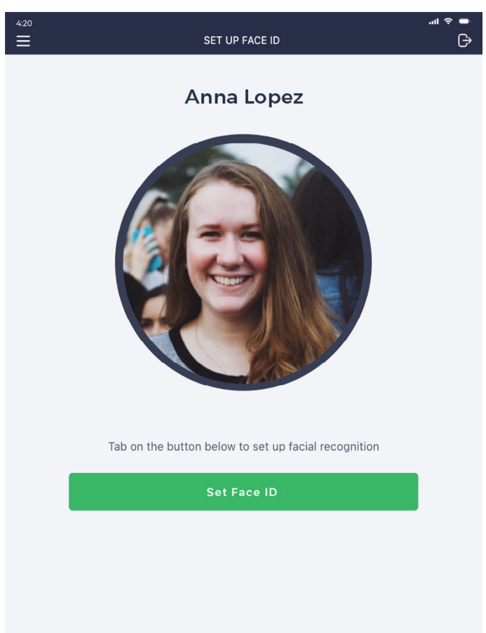




3. Choose from the two options above. Then choose whether employees will clock in via **PIN Code** or **FaceID**. **Six-Digit PIN Code** for each employee can be found in the **Administration > Employees > Employee's name > Time and Attendance > Timesheets > Enable PIN**. When you choose to **Enable 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.