



# tSuite



# Users Guide

Version 1.5

Softek, LLC



*tSuite* is a powerful, easy-to-use time keeping software package. It features workstation software for employees to clock in and clock out, and an administrative program to manage employee information and time records, and to print or export reports for payroll.



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## Getting Started – Initial Setup

### *The Administrative Program*

#### Start the program

- Double click the program icon on the desktop, or click *Start Programs – tSuite – tSuite*.
- Enter “password” (only asterisks appear as you type), and click *OK* to get started.
- Remember to change this default password later during the setup steps



#### Enter Company Information

| Custom Settings | Personal | Edit/Add Time Records |
|-----------------|----------|-----------------------|
| Reports         | Company  | Database              |

Company: Central Associates  
Address: 1111 San Ysidro SE  
City: Albuquerque  
State: NM  
Zip: 87100  
Phone: (505) 555-8888

Save  
Cancel

- Click the *Company* tab.
- Enter the information about your company.
- Click *Save* when you are finished.



### Enter Your Custom Choices

- Click the *Custom Settings* tab.
- Enter the required information.
- Be sure to enter a new password, and keep a copy of it in a secure location. The new password will take effect when you restart the program.
- The mail server and email data are required for electronic notices that will be sent automatically when unusual times are detected in employee records.
- Payroll information is required for correct overtime calculations on payroll printouts.

- If your company's standard work week is other than Sunday through Saturday, select the correct starting day in the drop down box.
- Enter the weekly and daily hours required for overtime pay.
- If you want to show gross wage calculations in time reports, be sure to check the box next to the "Include wage calculations in the reports?" box.

- Click Save to store your settings.



### Enter Personnel Information

- Click the *Personnel* tab, and enter information about each employee.
- To add an employee, click on the *Add* button.
- The button caption changes to *Save*.

The screenshot shows the 'Personnel' tab in the iSuite Administration software. The form is divided into two main sections: 'Personal' and 'Payroll'. The 'Personal' section includes fields for Employee #, Name (First and Last), Address, City, State, Zip, SS #, and Emergency Information. The 'Payroll' section includes fields for Hire Date, Position, Home Phone, Work Phone, Payroll Category, Standard Pay Rate, Overtime Pay Rate, Password, and Termination Date. A blue arrow points to the 'Add' button, which is currently labeled 'Add'.

- Enter SS# and phone numbers without dashes or parentheses.
- To add a photo, click on the Photo space, and select the photo to add
- Be sure to select the correct payroll type (Weekly, Monthly, or other period).
- Include pay rates if you want to see currency amounts on the payroll time reports.
- Enter a unique password. Remember to inform each employee of their password because they will need it to access their *Login* screen to clock in and out.

- Click the *Save* button to add the employee's information in the database. The button caption changes to *Add*, and the *Edit & Delete* buttons appear.

The screenshot shows the 'Personnel' tab in the iSuite Administration software with an employee record for Jack Winters. The 'Personal' section is filled with: Employee # 12, Name Jack Winters, Address 20200 Altima Ave, NE, City Albuquerque, State NM, Zip 87000, SS # 222-11 6666. The 'Payroll' section is filled with: Hire Date 08-01-2002, Position CEO, Home Phone (505)555-6565, Work Phone (505)555-3333, Payroll Category Monthly, Standard Pay Rate \$25.00, Overtime Pay Rate \$27.50, Password \*\*\*\*, and Termination Date. The 'Add' button is now labeled 'Save', and 'Edit' and 'Delete' buttons are visible. A message says: 'To change a person's record, click the Edit button'.

The remaining three tabs (*Edit/Add Time Records*, *Database*, and *Reports*) are useful after employees enter time records; see the section "Using the Software"

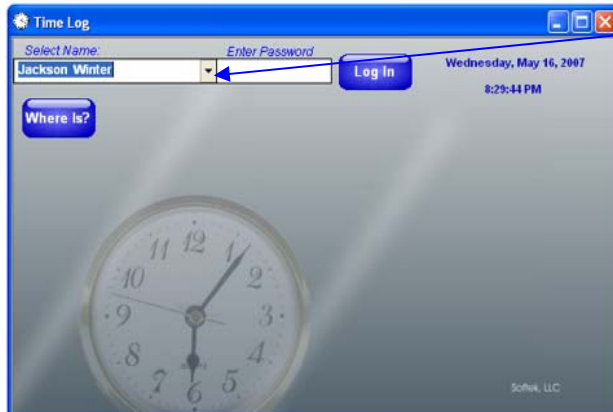


## Using the Software

### ***The Employee Program - Clock In and Out***

#### **Clock In**

Start the program by double clicking the program icon on the desktop or by selecting *Start Programs – tSuite – tSuiteEmployee*.



- Select your name by clicking the down arrow or typing into the left hand box.
- Enter your password (assigned by the administrator), and click on the *Log In* button
- Click on the *Clock IN* button.

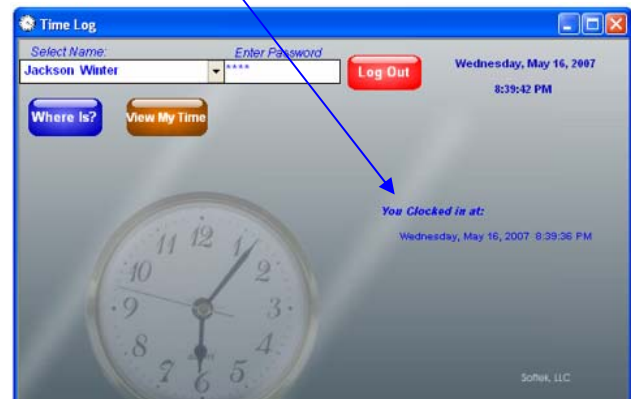


#### **Need to Find the Database?**

If you see a message requesting the location of the database, locate **tSuite.mdb** by clicking the down arrow in the *Look in* text box near the top of the window. Then, navigate to the database location, and double click the file name.



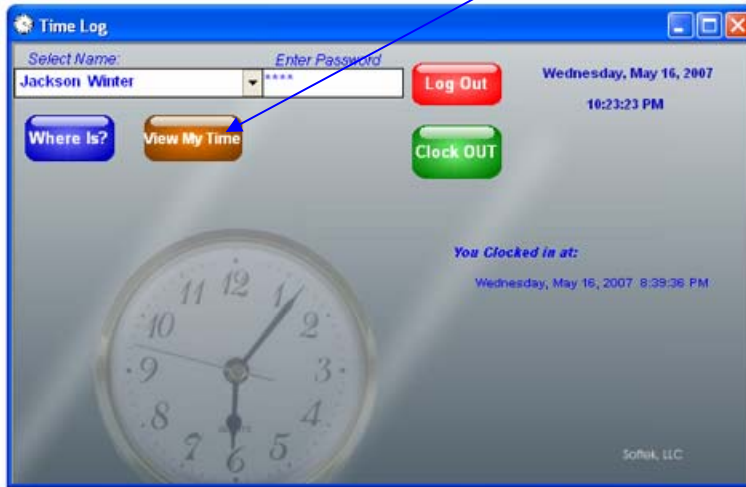
- The Clock IN button disappears
- Clock-in date and time are displayed



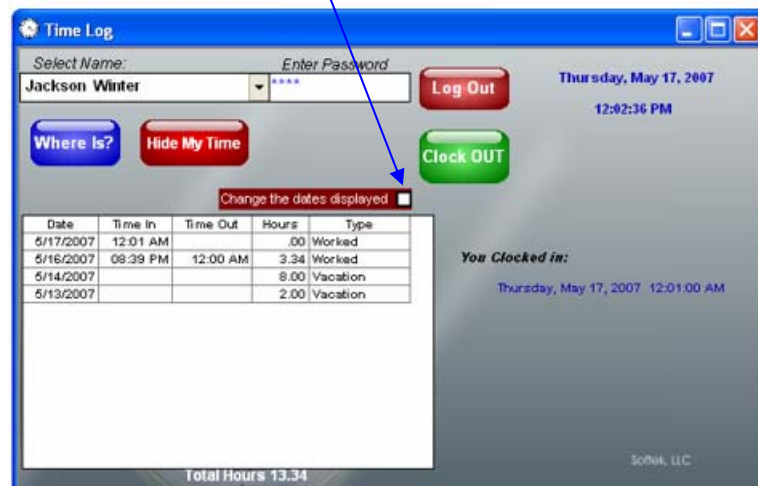


### Review Time Records

Click on the *View My Time Records* button.



Examine different periods by clicking the *Change the Dates Displayed* check box, and entering the desired start and end dates.

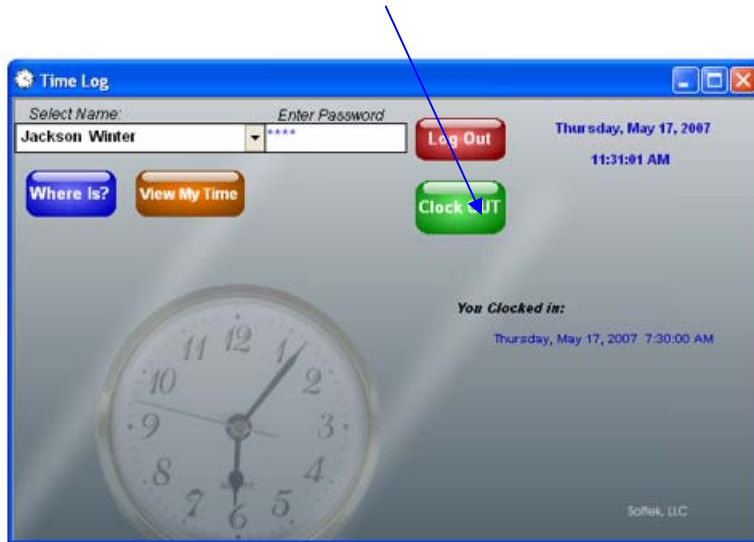


Click the *Log Out* button to end the session.

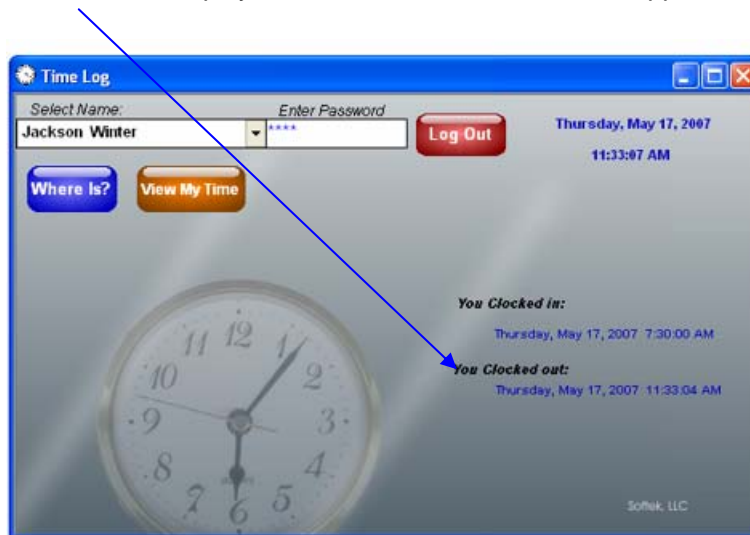


### Clock Out

- Select your name by clicking the down arrow or typing into the left hand box.
- Enter your password (assigned by the administrator), and click on the *Log In* button
- Click on the *Clock OUT* button.



Clock-Out date and time are displayed, and the *Clock Out* button disappears.

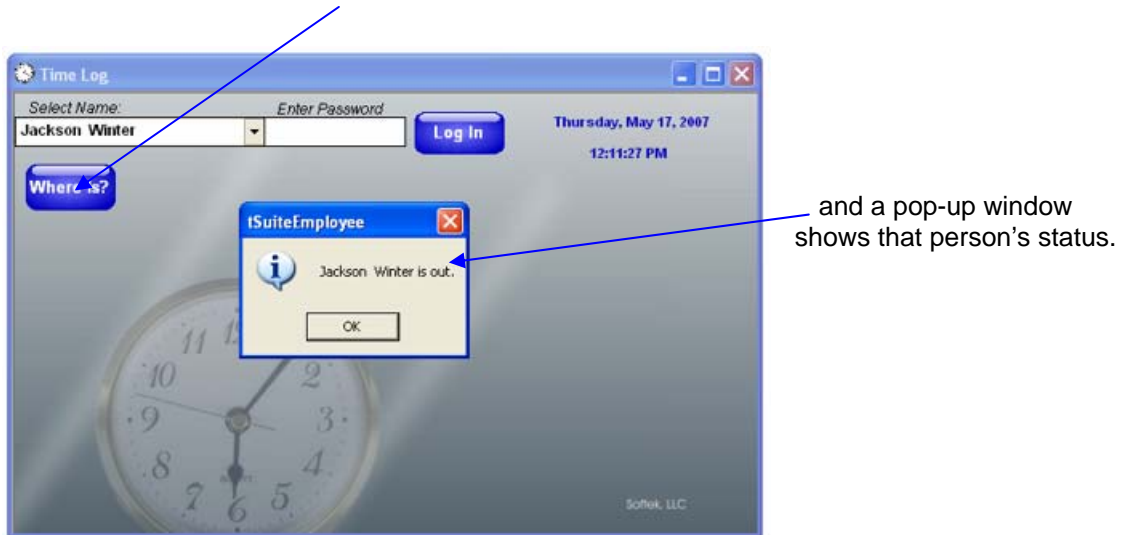


Click the *Log Out* button to end the session.



## Find Employees

To check the current status (location) of an employee at any time, start the Employee program, select the name, and click the *Where Is?* button....



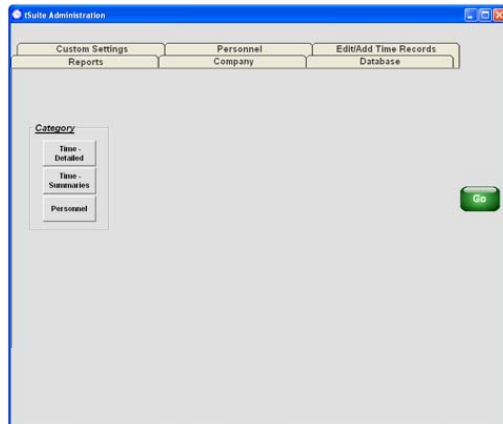


## The Administrative Program

If the program isn't running, double-click the tSuite program icon on the desktop, or click on **start** – All Programs – tSuite – tSuite. Enter your password, and the *Administrator Functions* screen will appear.

### Reports

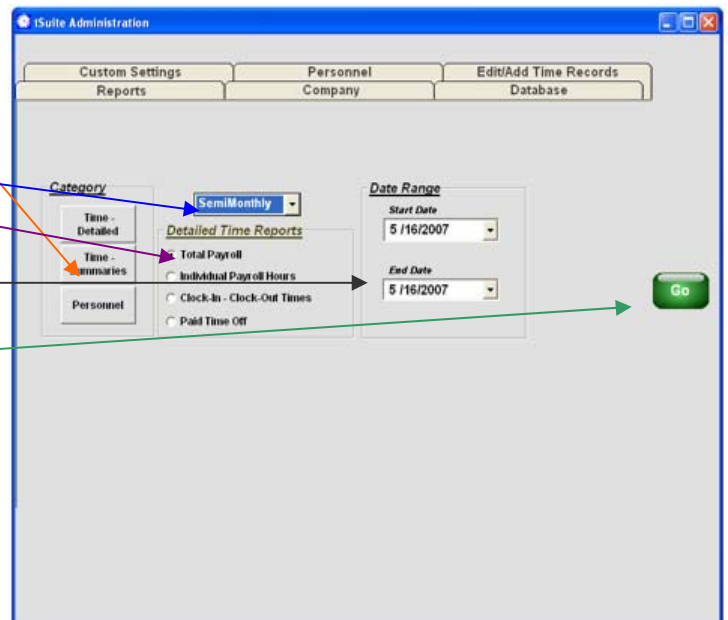
1. Click on the *Reports* tab.



2. Under *Category*, click on one of the three choices for the type of report you want. Additional lists will be displayed to allow you to create the report.

**Summary Reports:** For example, to generate a summary report for all semimonthly-paid employees:

- Click the *Time-Summaries* button;
- Select *SemiMonthly* from the drop-down box,
- Select the *Total Payroll* option;
- Enter the payroll *Start* and *End Dates* using the calendars under *Date Range*.
- When you are satisfied with your choices, click the *Go* button to display the report



**IMPORTANT:** *The start and end dates that you select must coincide with the actual pay period; otherwise overtime and totals calculations will be incorrect.*

After a few seconds, an on-screen tabulation will show summaries for each semimonthly paid employee, as well as grand totals during the period.



**Printing:** To send the report to your default printer, click on the *Print* icon in the top toolbar.

| Date                                 | Regular Hours | Overtime Hours | Vacation Hours | Holiday Hours | Sick Leave Hours |
|--------------------------------------|---------------|----------------|----------------|---------------|------------------|
| Payroll Totals For Harmony, Julia    | 72.42         | 0.00           | 0.00           | 0.00          | 0.00             |
| Payroll Totals For Jones, Joan       | 30.96         | 0.00           | 0.00           | 0.00          | 0.00             |
| Payroll Totals For Orrander, Kenneth | 85.82         | 12.64          | 0.00           | 0.00          | 0.00             |
| Payroll Totals For Winter, Jackson   | 71.71         | 0.00           | 0.00           | 0.00          | 0.00             |
| <b>Grand Totals:</b>                 | <b>264.36</b> | <b>260.91</b>  | <b>12.70</b>   | <b>0.00</b>   | <b>0.00</b>      |

If you want to select a different printer, first click on the adjacent *Printer Setup* icon, choose the printer, then click the *Print* icon.

**eMailing:** You can eMail the report to a recipient. Click the *Mail* icon next to the *Printer Setup* icon, and follow the instructions that display on screen.

**Include Wages:** If you checked the box labeled *Include Wage Calculations in Reports?* in the *Custom Settings* tab, the report will include gross wages (shown in green).

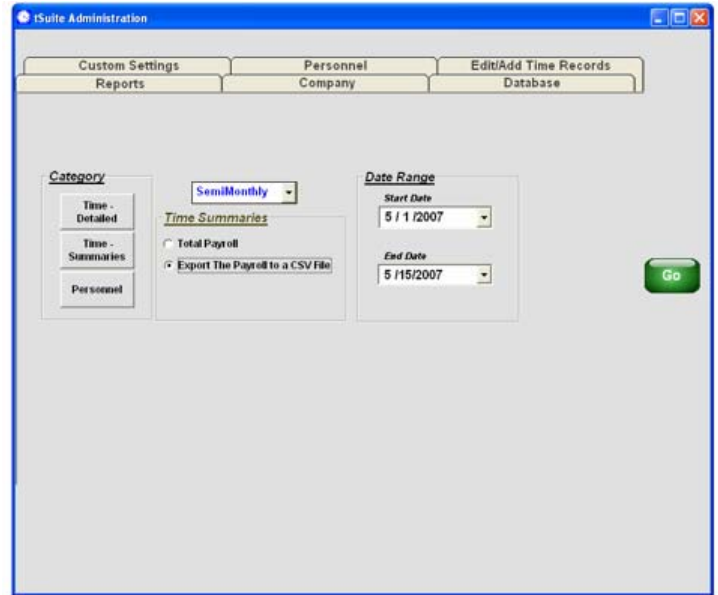
| Date                         | Regular Hours | Regular Pay       | Overtime Hours | Overtime Pay    | Vacation Hours | Vacation Pay  | Holiday Hours | Holiday Pay   | Sick Leave  | Sick Leave Pay |
|------------------------------|---------------|-------------------|----------------|-----------------|----------------|---------------|---------------|---------------|-------------|----------------|
| Totals For Harmony, Julia    | 72.42         | \$1,086.30        | 0.00           | \$1.35          | 0.00           | \$0.00        | 0.00          | \$0.00        | 0.00        | \$0.00         |
| Totals For Jones, Joan       | 30.96         | \$557.28          | 0.00           | \$0.00          | 0.00           | \$0.00        | 0.00          | \$0.00        | 0.00        | \$0.00         |
| Totals For Orrander, Kenneth | 85.82         | \$1,716.40        | 12.64          | \$379.20        | 0.00           | \$0.00        | 0.00          | \$0.00        | 0.00        | \$0.00         |
| Totals For Winter, Jackson   | 71.71         | \$1,792.75        | 0.00           | \$0.00          | 0.00           | \$0.00        | 0.00          | \$0.00        | 0.00        | \$0.00         |
| <b>Grand Totals:</b>         | <b>264.36</b> | <b>\$5,152.73</b> | <b>12.70</b>   | <b>\$380.55</b> | <b>0.00</b>    | <b>\$0.00</b> | <b>0.00</b>   | <b>\$0.00</b> | <b>0.00</b> | <b>\$0.00</b>  |



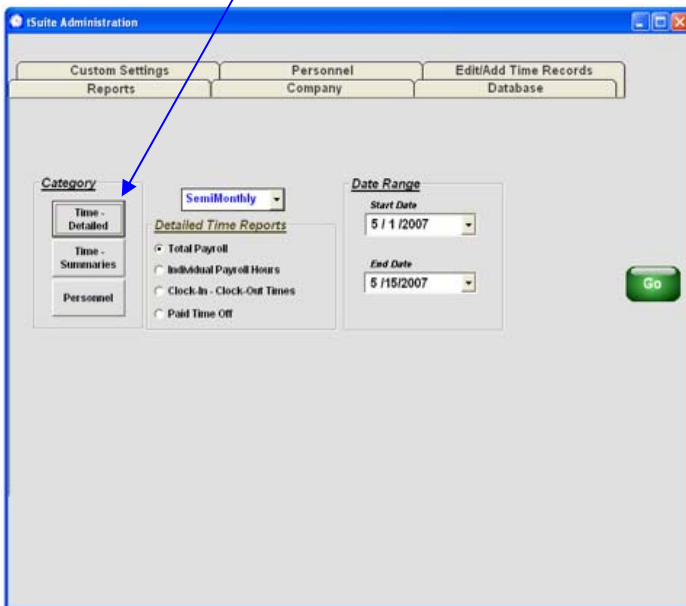
**Export to a Spreadsheet:** Summary reports (only) can be exported to a spreadsheet file for many payroll programs.

- Click the *Time Summaries* category
- Select the payroll type
- Select the *Export the Payroll to a CSV File* option
- Select the desired dates.
- Click Go

An appropriately named file, such as *SemiMonthlyPayrollEnding 6-15-2006.xls* will be created in the C:\keeperData folder on the administrative computer.



**Detailed Time Reports:** Click the *Time-Detailed* category, select the desired payroll period, type of report, and dates. The detailed report includes daily entries, weekly and pay period sums, plus grand totals for all employees. Optionally, wage calculations can be included.



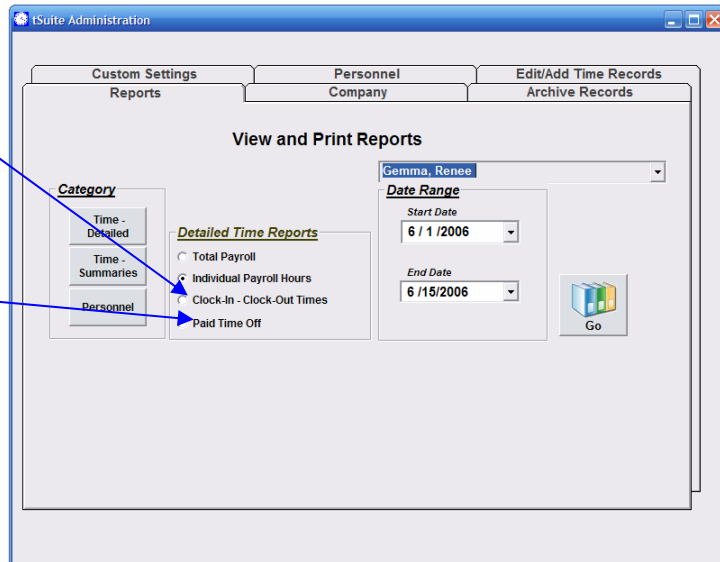
| SemiMonthly Paid Time 6/1/2006 to 6/15/2006 |               |          |          |         |            |      |
|---|---------------|----------|----------|---------|------------|------|
| Date  | Regular Hours | Overtime | Vacation | Holiday | Sick Leave |      |
| <b>Harmony, Julia</b>                       |               |          |          |         |            |      |
| Week Of 5/28/2006                           | 5/28/2006     | 0.00     | 0.00     | 0.00    | 0.00       | 0.00 |
| Week 1                                      | 0.00          | 0.00     | 0.00     | 0.00    | 0.00       | 0.00 |
| Week Of 6/4/2006                            | 6/2/2006      | 0.00     | 0.00     | 0.00    | 0.00       | 0.00 |
| Week 2                                      | 0.00          | 2.00     | 0.00     | 0.00    | 0.00       | 0.00 |
| <b>Payroll Totals For Harmony, Julia</b>    |               |          |          |         |            |      |
|   | 0.00          | 0.00     | 2.00     | 0.00    | 0.00       | 0.00 |
| <b>Jones, Jean</b>                          |               |          |          |         |            |      |
| Week Of 5/28/2006                           | 5/28/2006     | 0.00     | 0.00     | 0.00    | 0.00       | 0.00 |
| Week 1                                      | 0.00          | 0.00     | 0.00     | 0.00    | 0.00       | 0.00 |
| Week Of 6/4/2006                            | 6/2/2006      | 0.00     | 0.00     | 0.00    | 0.00       | 0.00 |
| Week 2                                      | 0.00          | 0.00     | 0.00     | 0.00    | 0.00       | 0.00 |
| <b>Payroll Totals For Jones, Jean</b>       |               |          |          |         |            |      |
|   | 0.00          | 0.00     | 0.00     | 0.00    | 0.00       | 0.00 |
| <b>Orlander, Kenneth</b>                    |               |          |          |         |            |      |
| Week Of 5/28/2006                           | 5/28/2006     | 0.00     | 0.00     | 0.00    | 0.00       | 0.00 |
| Week 1                                      | 0.00          | 0.00     | 0.00     | 0.00    | 0.00       | 0.00 |
| Week Of 6/4/2006                            | 6/2/2006      | 0.00     | 0.00     | 0.00    | 0.00       | 0.00 |
| Week 2                                      | 0.00          | 0.00     | 0.00     | 0.00    | 0.00       | 0.00 |
| <b>Grand Totals</b>                         |               |          |          |         |            |      |
|   | 0.00          | 0.00     | 2.00     | 0.00    | 0.00       | 0.00 |
| <b>Summary</b>                              |               |          |          |         |            |      |
| Regular Hours:                              | 0.00          |          |          |         |            |      |
| Overtime Hours:                             | 2.00          |          |          |         |            |      |
| Paid Time Off:                              | 0.00          |          |          |         |            |      |
| Sick Leave:                                 | 0.00          |          |          |         |            |      |
| Total:                                      | 2.00          |          |          |         |            |      |



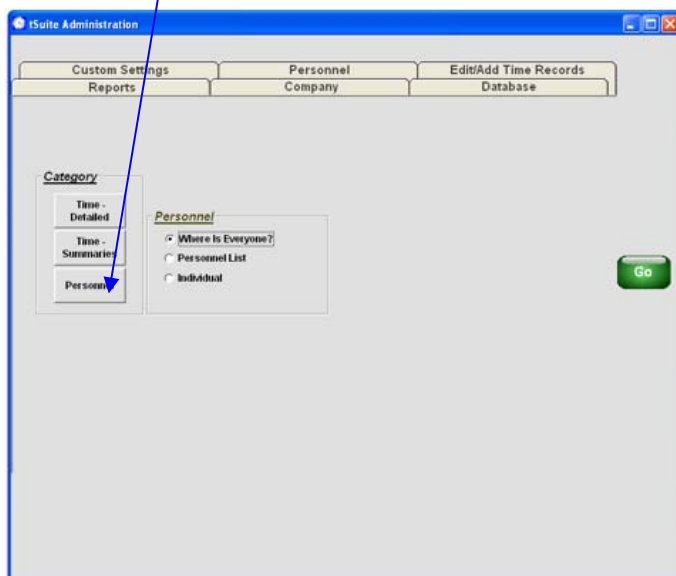
**Individual Reports:** If you want to limit a report to one person, simply choose *Individual Payroll Hours*, rather than *Total Payroll*. A drop box will appear so that you can select the individual by name.

**Clock-In Times:** To review Clock-in and Clock-out times between any two dates, click on *Clock-In Clock-Out Times*, select the employee, enter the dates, and click Go.

**Paid Time Off:** You also can limit reports to *Paid Time Off* (vacation, holiday, sick leave) if you wish.



**Personnel listings:** Click the *Personnel* category, and choose *Where Is Everyone* to list their locations based on their most recent time clock entry, or choose a standard lists of employee information (name address, phones, and so on.)



Monday, November 14, 2005

### Where Is Everyone?

The most recent clock entries show:

| Clocked In        |             |                             |
|-------------------|-------------|-----------------------------|
| Henry, Chris      | 10:19:17 AM | Tuesday, November 08, 2005  |
| Orrender, Kenneth | 10:19:29 AM | Tuesday, November 08, 2005  |
| Gemma, Renee      | 10:38:56 PM | Saturday, November 12, 2005 |
| Clocked Out       |             |                             |
| Nickel, Gloria    | 4:51:22 PM  | Wednesday, October 19, 2005 |
| Winter, Jackson   | 4:59:19 PM  | Friday, October 21, 2005    |
| Jones, Joan       | 1:44:22 PM  | Thursday, October 13, 2005  |
| Harmony, Julia    | 4:59:19 PM  | Wednesday, October 19, 2005 |
| Smith, Sara       | 6:32:00 PM  | Saturday, October 01, 2005  |



## Editing, Deleting, and Adding Records

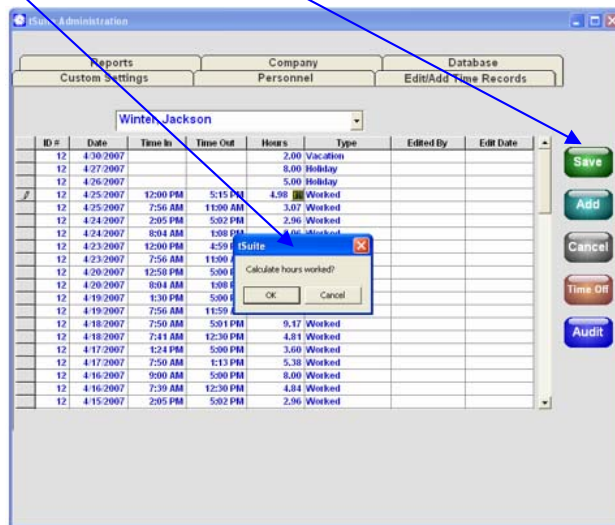
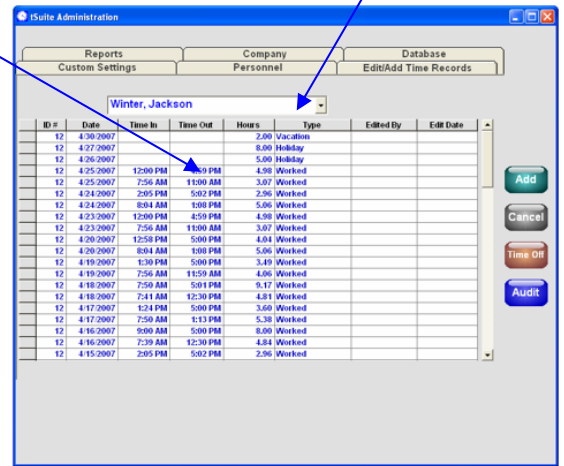
This screen allows you to correct errors, and to enter employee records for time worked, vacation, holidays, and sick leave.

NOTE: If your Custom Settings includes an eMail Server, an email message is automatically sent to the email address entered in the *Custom Settings* screen when Clock errors occur.

Click on the *Edit/Add Time Records* to display employee time records. Select the employee by clicking the down arrow next to the name box, scroll to the person of interest, and click on the name.

**Editing a Record:** Place the cursor in the cell to be changed and key in the new data.

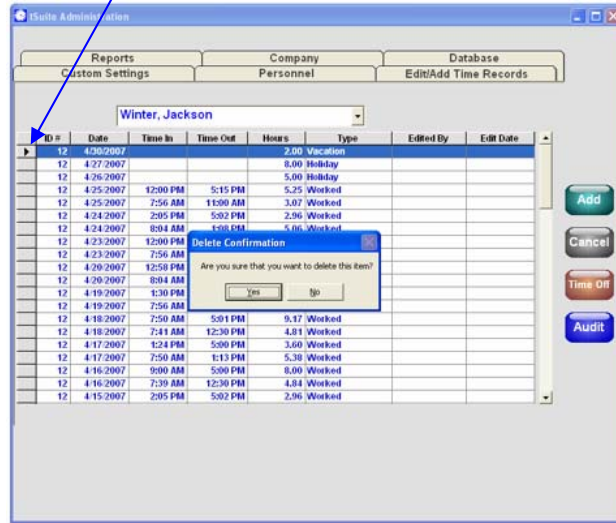
- When entering or changing a time, be sure to use this format: *nn:nn AM (or PM)*
- To calculate hours, place the cursor in the *Hours* cell, and click the tiny calculator icon.
- A message is displayed to confirm that you want to the calculation performed.
- If hours are shown in the *Hours* cell, be sure to enter the *Type*. Place the cursor in the cell, and click the down arrow to select the type.
- Click on *Save* when you have finished editing.



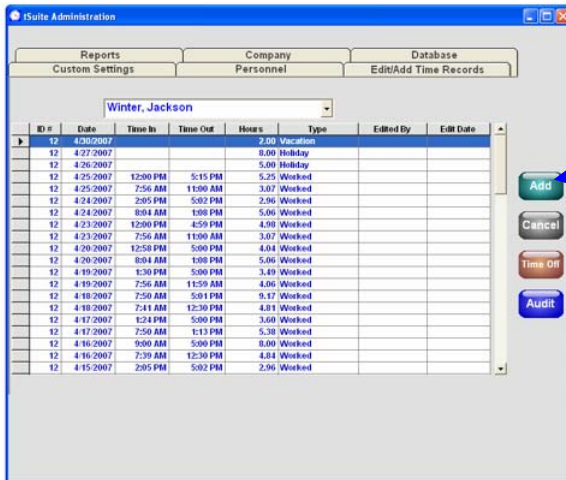


**Deleting a Record:** click on the leftmost cell of the record to be deleted; the record will be highlighted, press the *Delete* key on your keyboard.

A message will be displayed asking you to confirm the deletion. Click *Yes* to delete the record or *No* to cancel the request.

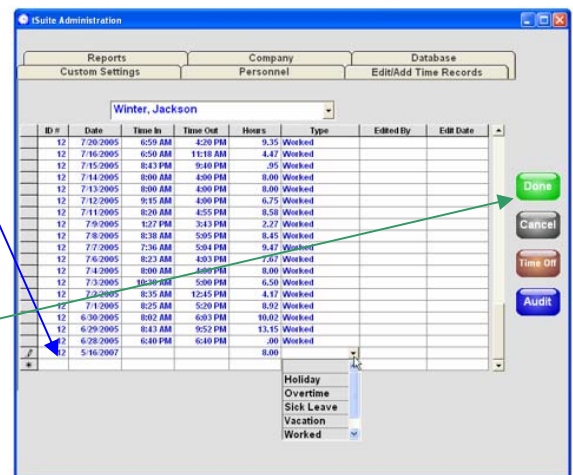


**Adding Individual Records:** You can add time records to an individual's file for any time worked or paid time off.



- Select the appropriate person
- Click on *Add*

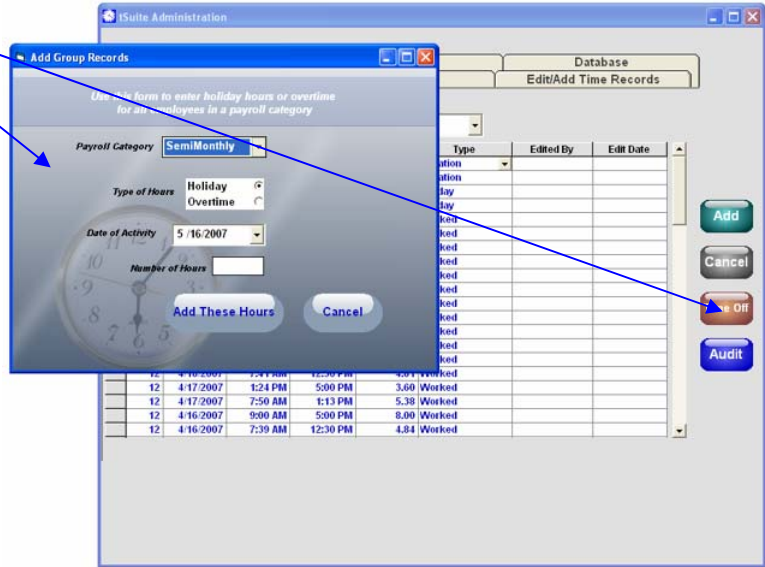
- A new record with the employee's ID entered will be displayed at the bottom of the grid
- Enter the date, times, hours, type and edited by data. Notice that the *Type* must be selected from a drop-down list.
- If you want to add more records for this individual, place the cursor on the next row in the *Date* cell, and enter the date, etc.
- When you are finished adding records for this person, Click *Done*





**Adding Time-Off Records For a Group:** Enter holiday hours (or overtime) for an entire group of employees. For example, to enter holiday hours for *Semimonthly* paid employees, do the following:

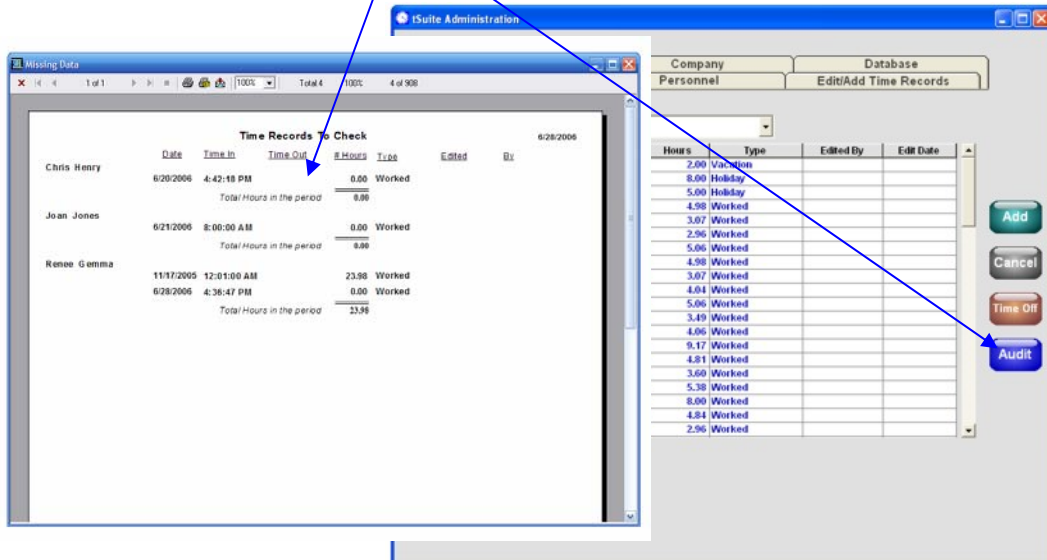
- Click on *Time Off*; a pop-up window appears.
- Select *SemiMonthly* in the *Payroll Category* drop down list
- Select the *Holiday* option
- Enter the date of the holiday pay (click the down arrow for a calendar display)
- Enter the number of hours to be paid.  
*Note that if you change your mind, you may click Cancel to cancel the operation.*
- Click on *Add These Hours* and a message will be displayed to confirm the number and type of records added.
- Click *Close* to return to the Administrative Functions screen.



To add Overtime hours for a group, follow the same procedure, selecting the *Overtime* rather than the *Holiday* option.

**Important:** Do not use this method to try adding hours for one person; this method will add the same number of hours to all employees in the Pay Category you select. To add overtime to one or a few employees, use the **Add a Record** button.

**Audit Time Records:** Click the *Audit* button to determine if any employee failed to clock out on any day. Clicking this button displays a printable list, by employee, of any record with a clock-in time, but no clock-out time.





## Personnel Information

Changes to personnel information can affect many other records, so use caution when editing this data.

- Click on the *Personnel* tab to display employee records
- Select an employee by clicking the down arrow next to the name text box; scroll to the person of interest, and click on the name.
- Click the *Edit* button, and key in the new data.
- When you are satisfied with the changes, click the *Done Editing* button to save the changes; or, if you decide not to make or save any changes, click the *Cancel* button to restore the previous data.

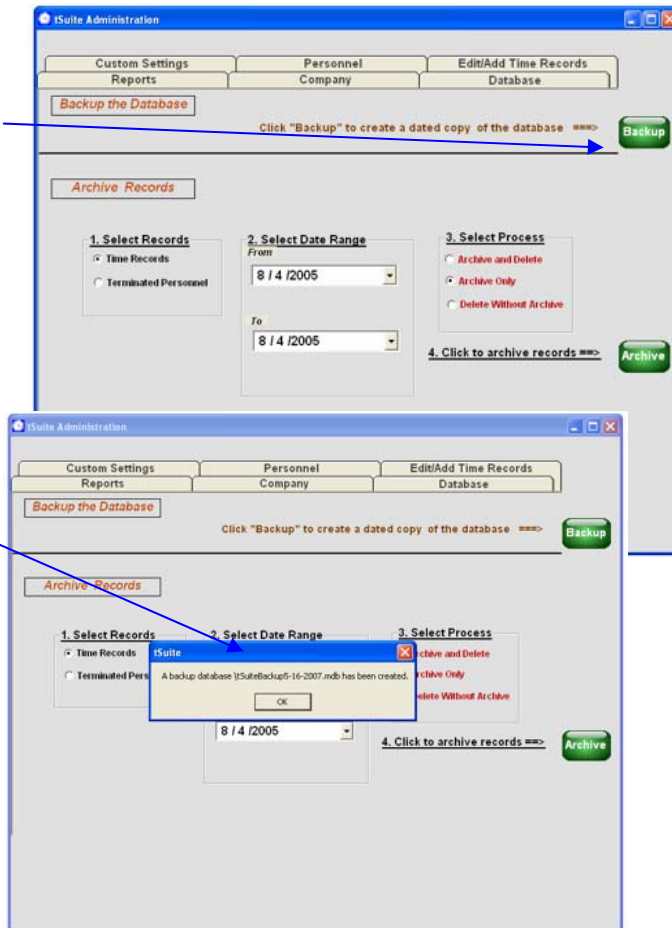
**IMPORTANT:** *Any changes you make will not be saved in the database. unless you click the "Edit This Person" button before typing any changes.*



## Database Maintenance

It is critical to create copies of the database regularly to guard against costly data loss. And it is easy to backup the database – DO THIS DAILY.

- Click on the *Database* tab.
- Click on the *Backup* button.
- A confirming message will be displayed to show the location and name of the backup database.



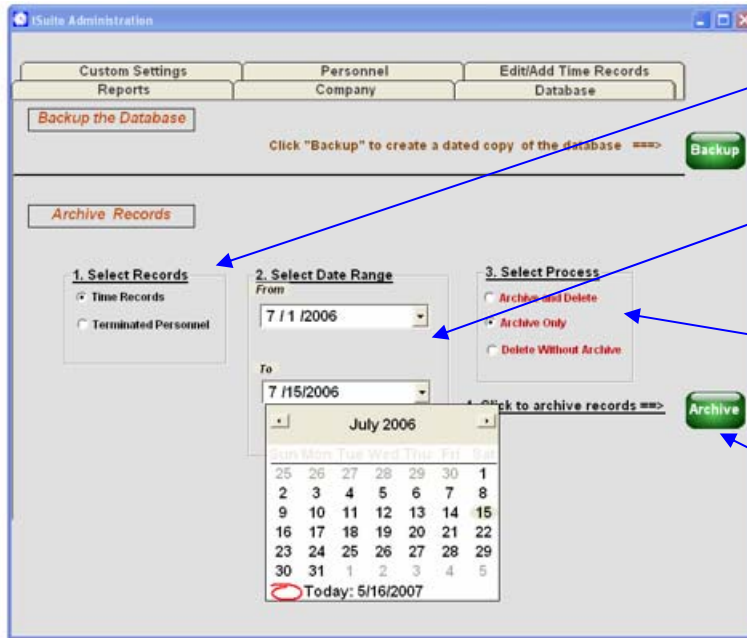
To restore a Backup database, double-click *My Computer* on your desktop, navigate to the tSuite.mdb database file. Then,

- Rename the existing tSuite.mdb file to tSuite.tmp
- Copy the backup database to the same folder as tSuite.tmp
- Rename the backup database to tSuite.mdb



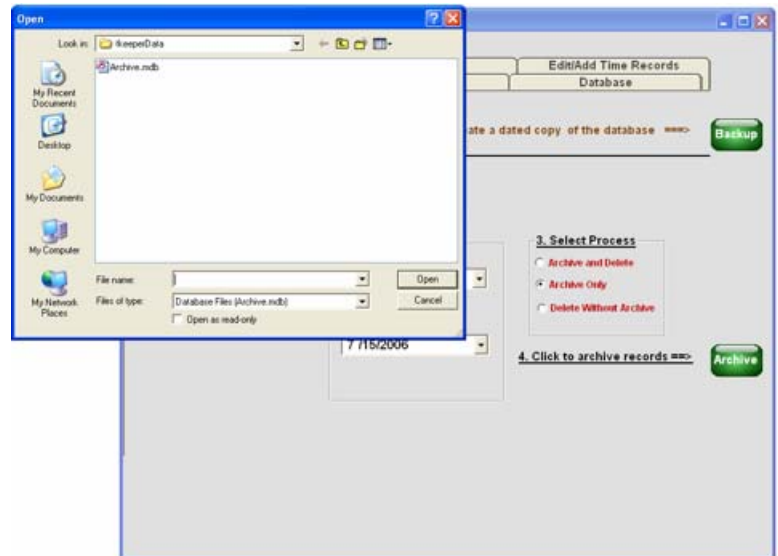
## Archiving Records

Click on the *Archive Records* tab.



- To archive employee time clock records, select *Time Records*; to archive personnel, select *Terminated Personnel*.
- Select the *from* and *to* dates in the Date Range box.
- Select the appropriate process to create the archive and/or delete the records selected.
- Click *Archive*.

- A window opens to allow you to find the database file that holds archived records (Archive.mdb). Double click the Archive.mdb file.
- A confirming message will be displayed when the records are archived and/or deleted as you requested.





## Appendix A

### ***Relocating the Database***

If you want to relocate the database to a server or a different workstation folder, ***be sure to backup the database first (see page 20).***

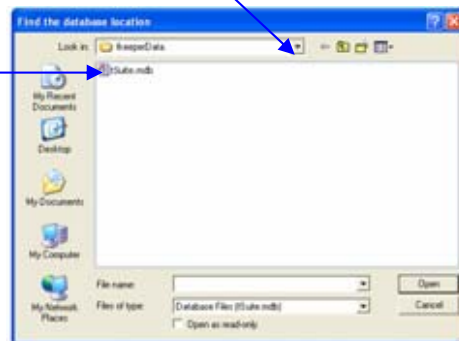
Make certain all tSuite programs are closed. Then, use the appropriate method to move the database. For examples:

- To another computer, use Windows Explorer, burn a copy of tSuite.mdb to a CD, or copy it to a memory stick to move it to the new location.
- To a new folder on the same computer, double-click *My Computer* on your desktop (or open Windows Explorer), navigate to the tSuite.mdb database file. Then, cut and paste the tSuite.mdb file to the new location.

**IMPORTANT:** *Be sure that only one copy of the current, operating tSuite.mdb database exists (all backups will have different names). Otherwise, you will have conflicting data records.*

After moving the database (and deleting it from the original location), when the programs are restarted you will be asked to provide the new location. Find ***tSuite.mdb*** by clicking the down arrow in the *Look in* text box near the top of the window.

Then, navigate to the database location, and double click the file name.



When this step is completed successfully, the password dialog will be displayed.



## Appendix B

### ***Product Information***

**tSuite** is an employee time tracking and reporting program. Designed for small businesses, tSuite records time worked, vacation, holiday, and sick time. Employees clock in and clock out using a simple password-protected form displayed on a workstation screen.

Managing employee payroll time is easy, accurate, and complete with the simple tracking and reporting options available in the easy-to-use password-protected administrative screens. A wide variety of reports, including spreadsheet-style exports, are included.

### ***System Requirements***

*Computers:* If more than one station is used, all workstations must be networked (peer-to-peer or with a server).

*Operating System:* Windows 98SE, 2000, or XP; a server (optional) can use Windows 2000 Server or Windows 2003 Server software

*Memory:* 64KB

*Video Adapter:* Minimum of 800 x 600 pixel resolution, 256 colors

*Disk Space:* 40 MB to install the program; database maximum size 2 GB

*Printer:* Any Windows-supported printer

### ***Features and Limitations***

*Ease of Use:* Simple operation, uncluttered screens

*Password protection:* For all employee records

*Reports:* Over 60 different reports for all combinations of payroll types and pay periods.

*Number of Users:* 25 per purchased license. Note that most operating systems limit the number of users that can be connected simultaneously, so that users should click the Close button on the Employee Program after each clock-in or clock-out.



## Appendix C

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Software Title: tSuite Time Tracking and Reporting

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