Jolly Presents…

Time Track Getting Started Guide

An Introduction to Time Track

Contents

Introducing Time Track

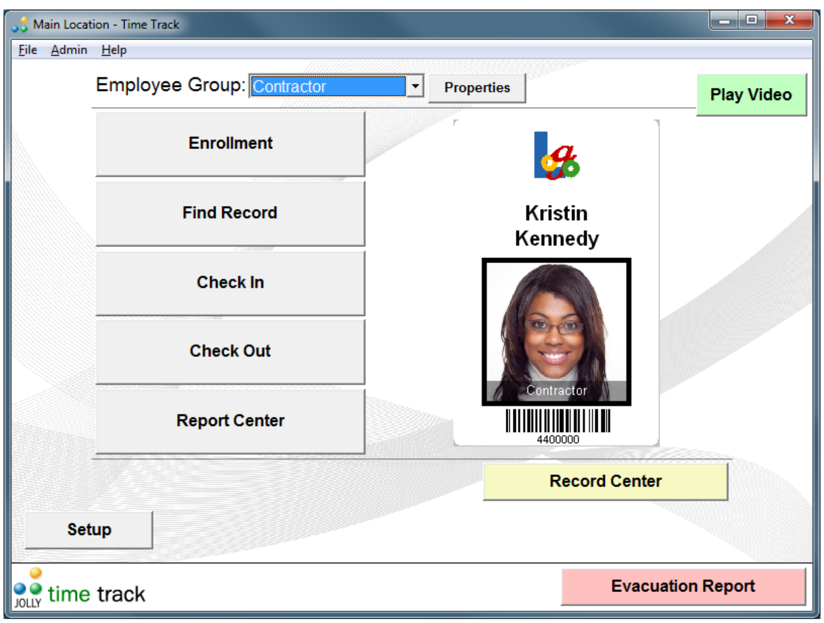
Time Track is a software tool designed for badging and tracking employee and contractor time and attendance.

Time Track is flexible: It may be tailored for any type of company and any group of people. Included are preconfigured databases to accommodate employees and contractors. It is also designed to be easily linked to existing data systems. The data fields and activity logs are user definable for any particular purpose.

This guide provides a general overview of product components and instructions on getting started. This guide is a supplement to the Help system provided within the product. The integrated Help system provides comprehensive configuration details.

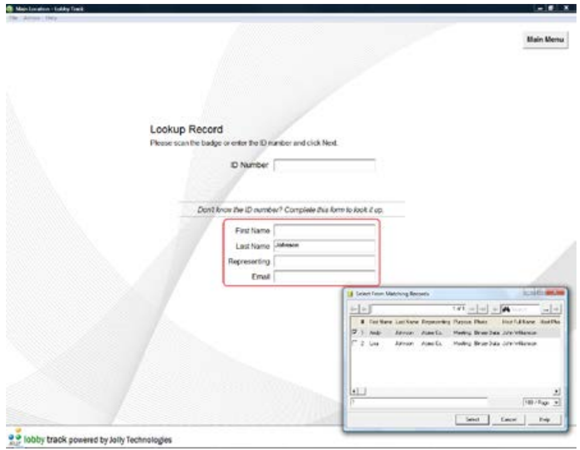
Overview

Time Track is menu driven: It presents directed tasks that make the reception process easy. The *Main Menu* presents buttons that indentify the regular tasks. Time Track is extremely customizable: Available tasks and data to be collected are easily definable.

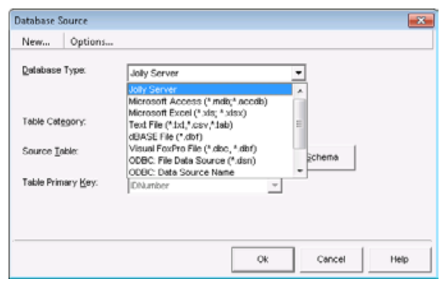


Define the steps of *your* enrollment process. The *Enrollment* process can incorporate record data entry, photo capture, signature capture, fingerprint, capture, card print, and check in.

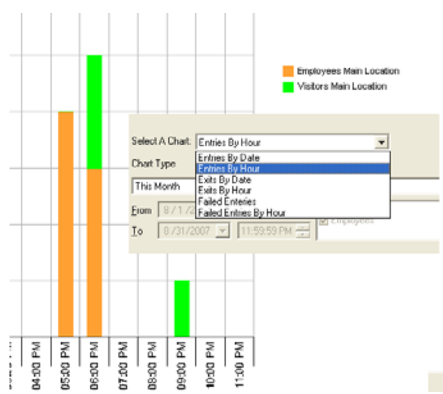
Define your lookup fields for record retrieval and check in/out policy:



The database, the fields in the database and record layout are customizable:



Report Center provides details of all activities. Customizable logs, charts and reports are built-in:



1 of 1

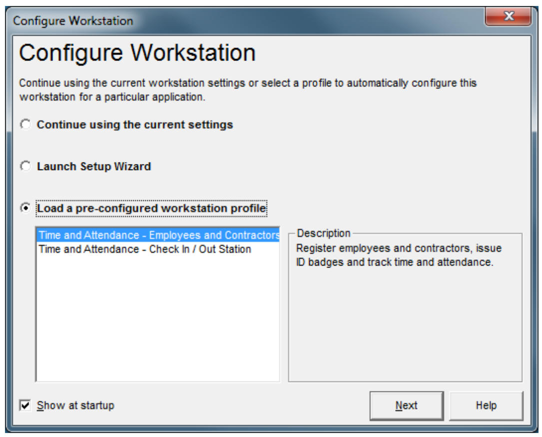
#	Log ID	Date	Action	First Name	Last Name	Group	Result	Location
1	170	8/30/2007 5:10:34 PM	Check In	Lisa	Johnson	Employees	Success	Main Location
2	171	8/30/2007 5:10:38 PM	Check In	Michelle	Smith	Employees	Success	Main Location
3	172	8/30/2007 5:10:42 PM	Check In	Patrick	Combs	Employees	Success	Main Location
4	173	8/30/2007 5:10:48 PM	Check In	Carlos	Diaz	Employees	Success	Main Location
5	174	8/30/2007 6:51:02 PM	Check In	James	Tolstoy	Visitors	Success	Main Location
6	175	8/30/2007 6:51:08 PM	Check In	Daniel	Belmont	Visitors	Success	Main Location
7	176	8/30/2007 6:51:13 PM	Check In	Molly	Brown	Visitors	Failed	Main Location
8	177	8/30/2007 6:51:18 PM	Check Out	Lisa	Johnson	Employees	Success	Main Location
9	178	8/30/2007 6:51:22 PM	Check In	Lisa	Johnson	Employees	Success	Main Location
10	179	8/30/2007 6:51:25 PM	Check Out	Lisa	Johnson	Employees	Success	Main Location
11	180	8/30/2007 6:51:34 PM	Check In	Lisa	Johnson	Employees	Success	Main Location
12	181	8/30/2007 6:51:39 PM	Check Out	Michelle	Smith	Employees	Success	Main Location

#	FirstName	LastName	DateIn	TimeIn	DateOut	TimeOut	HoursWorked	AccumulatedHours
1	Patrick	Combs	8/30/2007	6:51:43 PM	8/30/2007	9:07:29 PM	2.267	2.267
2	Carlos	Diaz	8/30/2007	5:10:48 PM	8/30/2007	9:07:48 PM	3.95	3.95
3	Lisa	Johnson	8/30/2007	5:10:34 PM	8/30/2007	6:51:18 PM	1.683	1.683
4	Lisa	Johnson	8/30/2007	6:51:22 PM	8/30/2007	6:51:25 PM	0	1.683
5	Lisa	Johnson	8/30/2007	6:51:34 PM	8/30/2007	9:07:42 PM	2.267	3.95
6	Michelle	Smith	8/30/2007	5:10:38 PM	8/30/2007	6:51:39 PM	1.683	1.683

A Quick Start

Quick Start Option 1

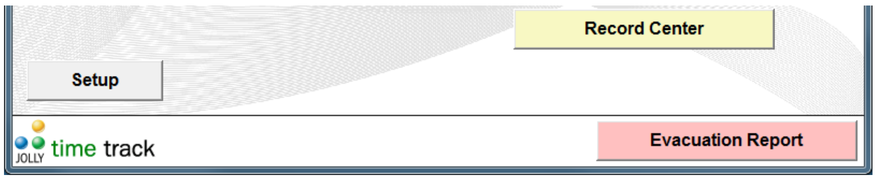
Time Track is preconfigured with *Workstation Profiles.* These profiles allow users to select an application that resembles their intended use. There are different profiles for attended and unattended stations. Profiles are configured with sample card designs, menu options and enrollment processes that are appropriate for the application.



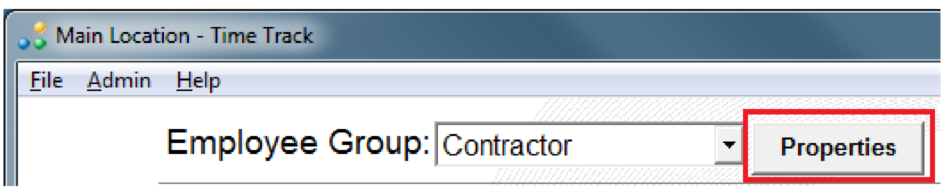
Behind each profile is an Employee Group(s) that contains its database, card design and settings.

Getting to Configuration

Configuration is done through the *Setup* button on the *Main Menu*. After clicking *Setup* you may choose to configure *Jolly Server Settings* or *Workstation Options and Devices*. The Record Center button takes you to the database view of all records.

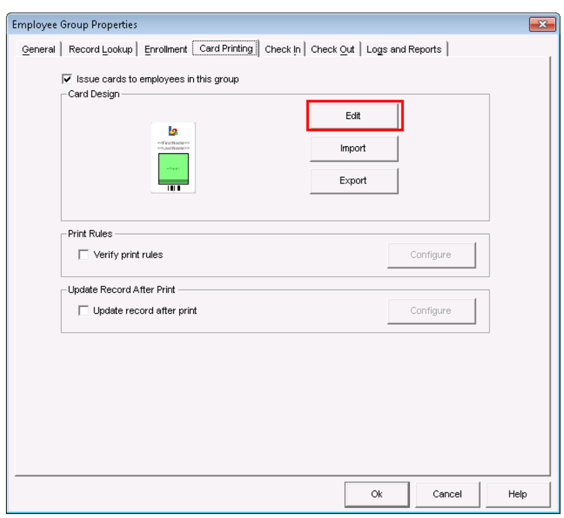


There is a shortcut to the selected employee group's properties dialog next to the group selection dialog.



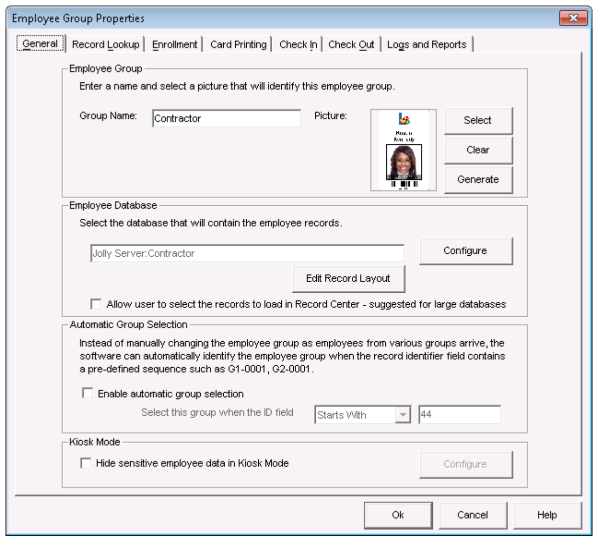
Changing Card Design

Card design may be modified by selecting "*Edit Card Design*" below the image on the *Record Center* or from the *Card Printing tab* on the *Employee Group Properties* dialog. This will launch *ID Flow Designer:*

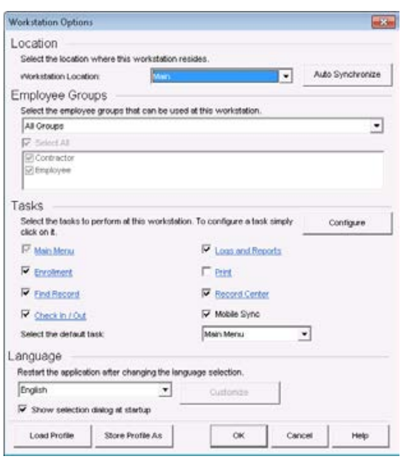


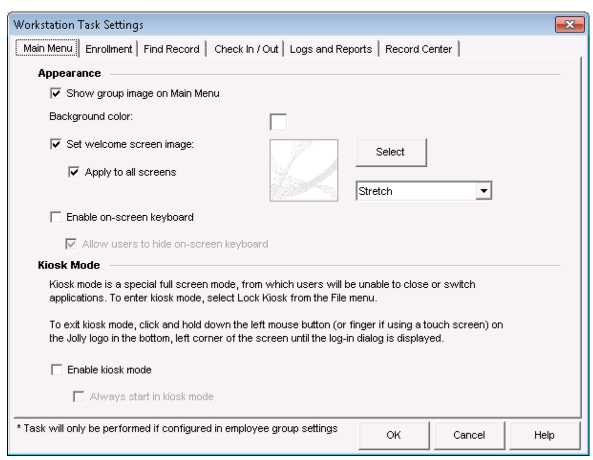
Quick Start Configuration

To globally define the enrollment process, lookup fields, entry/exit policy) and report fields go to the *Employee Group Properties* dialog in *Jolly Server Settings*. Go through each tab to change configuration.



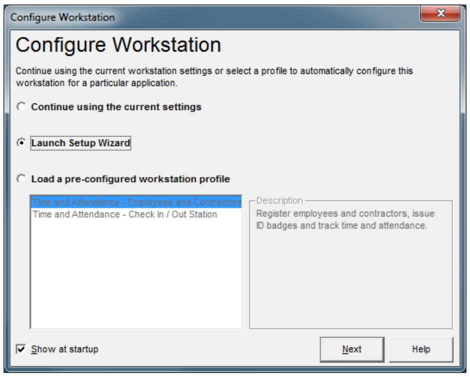
The tasks shown on the *Main Menu* screen, enrollment processes, check in / out settings and capture devices are set in the *Workstation Options*. Click on the blue hyperlink to configure the individual tasks or click the *Configure* button to configure them all at once.

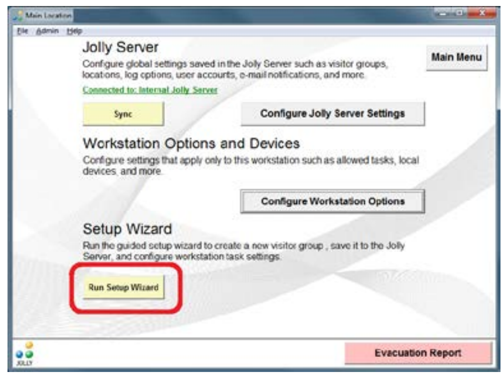




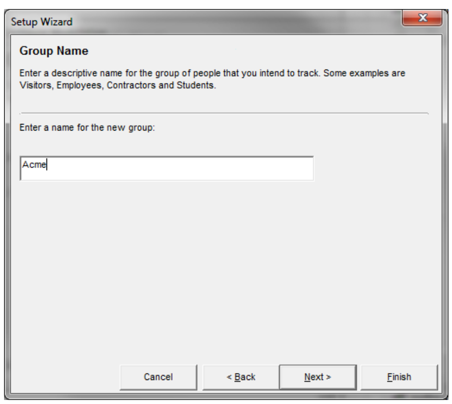
Quick Start Option 2

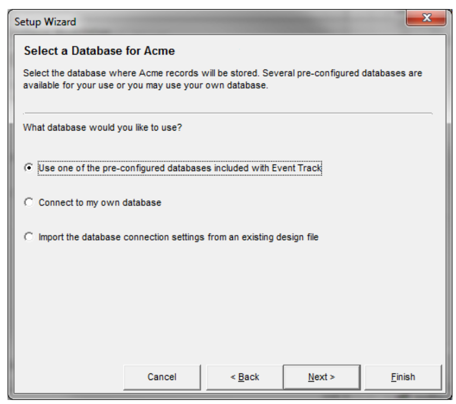
Select “*Launch Setup Wizard*” from the *Configure Workstation* dialog at start up or run from the *Setup* menu.



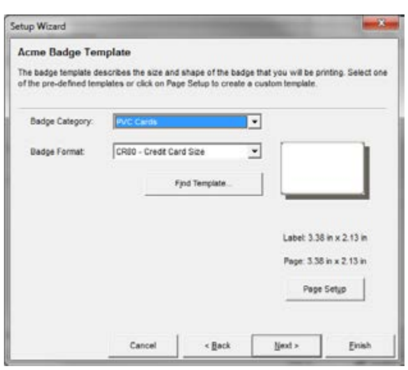


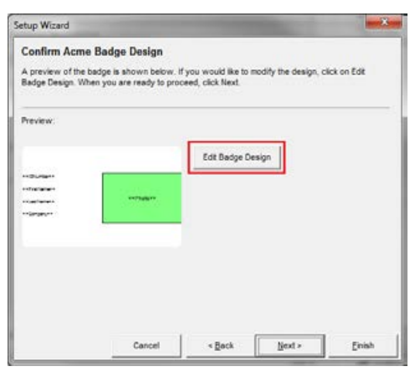
Name the employee group, then choose the database.





Choose the card type; then design the card:





When the card design is complete; exit and save.

Go through each tab on the *Employee Group Properties* dialog and *Workstation Options* dialog to configure – click *OK* when finished with each dialog.

Click *Finish* on the *Setup Complete* dialog and the initial set-up is done.

Go to *Jolly Server Settings* to add user groups, add users, add locations and to network multiple copies.

Jolly Server Settings

Time Track is designed to run across multiple locations in a networked environment. Shared settings such as employee groups and log data are stored on the Jolly Server while workstation specific options are configured in Workstation Options and Devices.

If Time Track will be used in a standalone environment where it does not need to share data with other workstations, it can use the Internal Jolly Server, installed as part of Time Track.

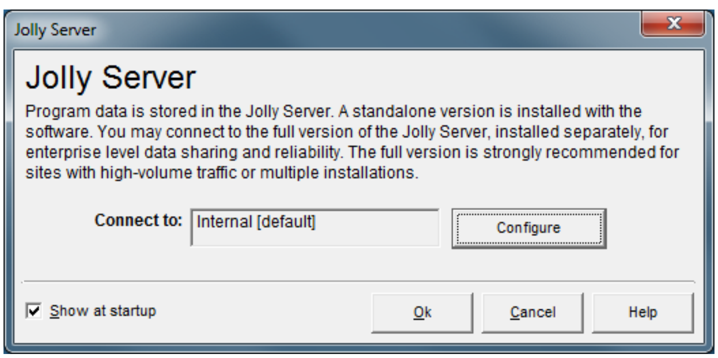
Installing Jolly Server

Jolly Server is installed separately from Time Track. To install, run the Jolly Server installer that was provided to you when you purchased the software on the target server or workstation.

Connecting to a shared Jolly Server – Networking Multiple Copies

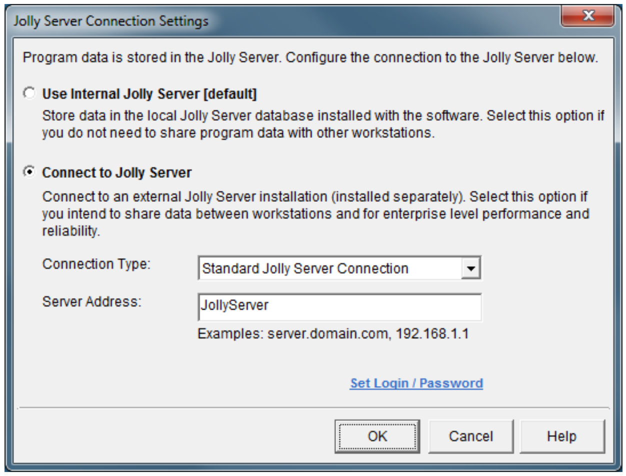
When networking multiple copies of Time Track, install the Jolly Server on a central server or shared workstation. All networked copies should point to the same Jolly Server.

To connect to a *Jolly Server*, select *File > Connect to Jolly Server.*



By default, the *Internal Jolly Server* is selected. When Internal Jolly Server is selected, the software will operate in standalone mode.

To connect to a shared *Jolly Server*, click the *Configure* button.

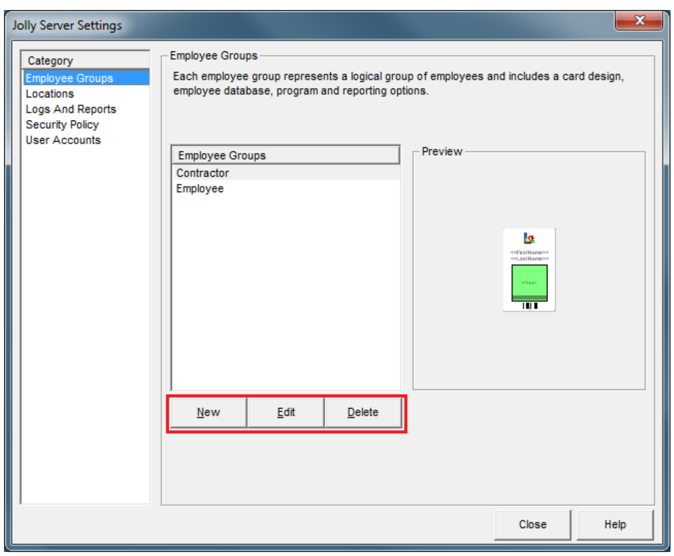


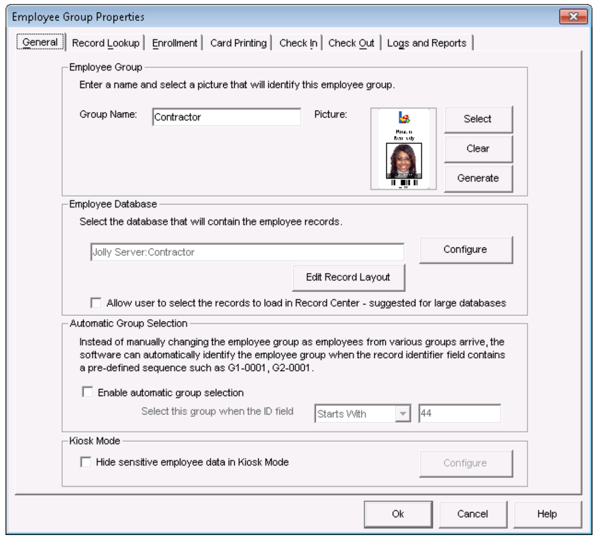
Enter the name of the server or workstation where Jolly Server was installed.

Employee Groups

Time Track allows for connecting to multiple groups of employees and multiple data sources simultaneously.

The Employee Group tab is the active selection when Jolly Server Settings is first opened. To add a new employee group select *New,* to edit an existing group select *Edit.* Either selection will open the Employee Groups Properties tab.





General Tab

This tab contains critical information for the Employee Groups database.

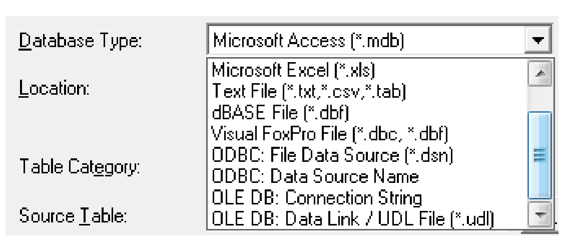
Employee Group

Give the group a name. Optionally select an image to represent the group on the Main Menu. Click *Select* to add your image or *Generate* to generate an image using the card design.

Employee Database

Time Track is open-data source. It may utilize existing databases, a new database or one of its Jolly Server's sample database tables. The employee databases contain the employee's information. Select the database in this dialog.

Included in the Jolly Server are tables that contain basics for employee records. To connect to an existing database, select database type then point to the database source.



Important Note: Databases must contain certain fields for certain operations within Time Track to function. The name of these fields is not important, that they exist is.

Field	Type	Required for
IDNumber	Number/Autonumber	Locating record
ExpireDate	Date	Denying access when expired
IsActive	Boolean	Denying access when not active
Photo	Image	Capturing a headshot
Signature	Image	Capturing a signature
Fingerprint	Image	Capturing a fingerprint

Record Lookup Tab

The *Record Lookup* tab is used to define fields by which to lookup records. **Time Track requires a unique record identifier. This is typically an autonumber field in the database.** Other fields for finding records may be selected. When no fields are mapped lookup is by the unique record identifier only. To present additional lookup fields, select the appropriate database fields in the *Information Field* selection boxes. An option to require exact match of all fields or partial matching is configured *Workstation Options.*

Enrollment Tab

The *Enrollment* tab contains options available in the enrollment process. Enrollment must also be configured in the *Workstation Options*. When these options are configured they become a step in the enrollment process. When they are not configured, they are either omitted from the enrollment process or that step becomes part of the general enrollment screen. To invoke the *Photo, Signature* and *Fingerprint* capture, map appropriate database fields.

Card Printing Tab

Issuing cards is optional. To issue cards check the box, then design the card with ID Flow. If a card has already been designed with ID Flow it may be imported. ID Flow is the premier product for professional ID card design. Print paper cards or double-sided plastic cards. Magnetic stripe, barcode and other encoding functions are available. More information on ID Flow follows.

Note: New to 6.0 is the ability to remember the last used printer by an Employee Group for a particular workstation. This allows Event Track to print to different printers for different employee groups at a workstation, as well as allowing for different printers at different workstations. In *Workstation Options*, you can select the default local printer.

Database fields may be updated after printing by configuring the U*pdate record after Print* dialog. You may set print rules to be verified before a card will print.

Check In and Check Out Tabs

The *Check In and Check Out* tabs are used to define access policy and gather additional information during the check in/out. You may deny access when a record is set to not active, when the termination date has passed, based on a number of visits, by time and location and other policy that you choose to define. Relevant database fields are required for these items.

On these tabs you may update fields after entry and exit: For example, a database field may be set to "Currently In" after check-in and "Currently Out" after check-out. Alerts that display messages on the screen at check in when specific conditions are met are configured here.

Logs and Reports Tab

Data such as ID number, date, time, location, user, action, result and comments are automatically logged whenever an action occurs in Time Track. Users may define four additional fields from the database that may be logged as well. First and last name are the most obvious, though all four may vary.

Align the log fields with the appropriate database fields.

Click Ok to close the Employee Group Properties dialog.

Locations

To define locations, select the *Locations* category in the *Jolly Server Settings*. To add a new location select *Add…* and define the location. The locations are defined here. The location of a workstation is selected in *Workstation Options*.

Logs and Reports

The Logs and Reports category in the Jolly Server Settings is used to define how logs are cleaned up.

Security Policy

Security Policy applies to cards. ID cards can contain an overlay watermark to make them more secure and encrypted so that they cannot be reproduced anywhere but from an authorized user on this Time Track system.

User Accounts

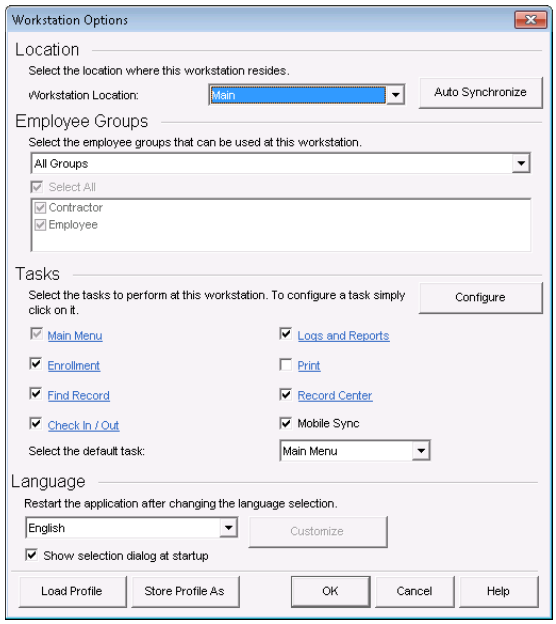
User Accounts define users allowed to use Time Track. Time Track user accounts can optionally be linked to Active Directory user accounts for single-sign on.

To add a new user select *Add…*

Users belong to a *User Group*. Four user groups are pre-defined: *Administrators, Supervisors, Designers* and *Operators*. Additional user groups may be defined.

Workstation Options and Devices

Workstation Options and Devices apply to the specific workstation. They include selecting the location, *Employee Groups* available at this location, selecting which tasks will be available to the user, configuring the tasks and capture devices, and selecting the language to be used a this location. Tasks are configured individually through the task's blue hyperlink or together via the *Configure* button.



Location

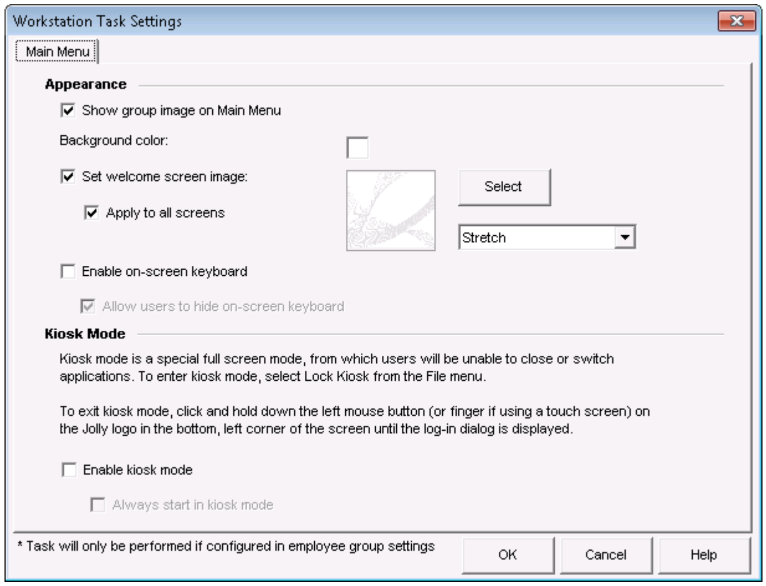
Select the location that this workstation resides at, such as Main Office. Locations can be configured in Jolly Server Settings.

Tasks

Configure the tasks to be performed on this workstation. It is recommended that the user first select the tasks available on this workstation and then go through each of the active tasks to examine the configuration options.

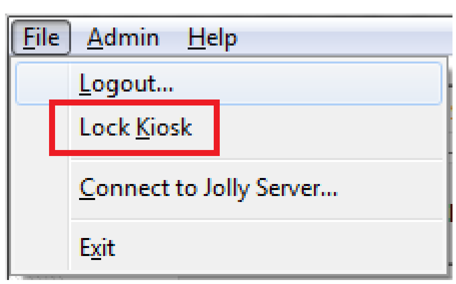
Main Menu

Any of the Time Track tasks may be set as the default screen that the program will return to when a task is completed. For frequent swiped check-ins, make the default the *Check in* screen. The *Main Menu* may be accessed from any task by selecting the *Main Menu* button. By default Time Track shows a preview of the card design for the current employee group in the *Main Menu*. That may be disabled here. A custom background image may also be imported here.



Kiosk Mode

Time Track may be run in an unattended *Kiosk Mode*. Examples of such use are a check-in only station or a self-enrollment station. When run in *Kiosk Mode*, the user is unable to change applications or get to other areas of the computer and network: Time Track is locked to the screen. When outward facing to employees, consider disabling show card design, logs and reports, record center, equipment tracking and other areas where sensitive data may be revealed



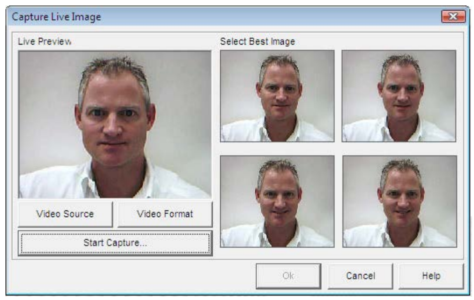
User's Exit Kiosk Mode through holding down the Jolly Logo on the Main Menu for 6 seconds. A password is required to advance.

Enrollment

The enrollment process for *this* workstation is defined on the *Enrollment* tab. To invoke an activity, click the check box. *Options* buttons provide more configuration of the selected item. Capture devices may be pre-defined so that they do not have be selected at the time of capture.

Notes about capture devices

Time Track supports TWAIN and WIA compatible cameras, as well as, the Canon SLR series Flash Cameras. The ability to capture a photo from within Time Track and trigger the flash will depend upon the camera's software. ID Flow is commonly used with web cams: When Microsoft WDM is invoked as the capture source, four photos are captured and the best may be chosen.



Time Track supports Topaz and Interlink USB signature and fingerprint pad.

Some device files and drivers may be found under "add-on modules" on the "Download" section of the www.jollytech.com website.

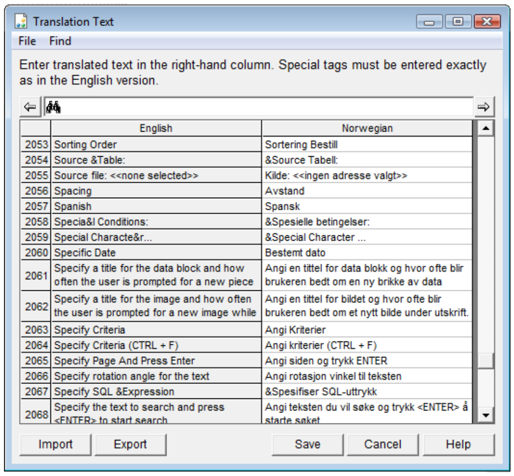
Check In / Out

Providing a check in and/or out screen, like all tasks, is optional. Many organizations check people in, but do not require a check out: In this instance it is recommended that everyone be automatically checked out at a certain time of day. For organizations that require a check out, Time Track may be set to automatically check in or out based on the employee's current status: If they are checked in it will check them out and visa versa.

The option to "Listen and process card scans in the background" is available. Barcode readers must be programmed with an STX and ETX commands for function.

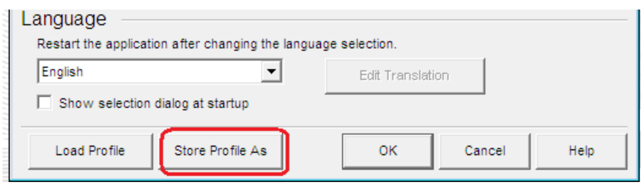
Language

Time Track is available in 10+ languages. A translation table allows the user to make changes to the translation or to translate into a language not yet provided by Jolly. After changing languages, restart the program.



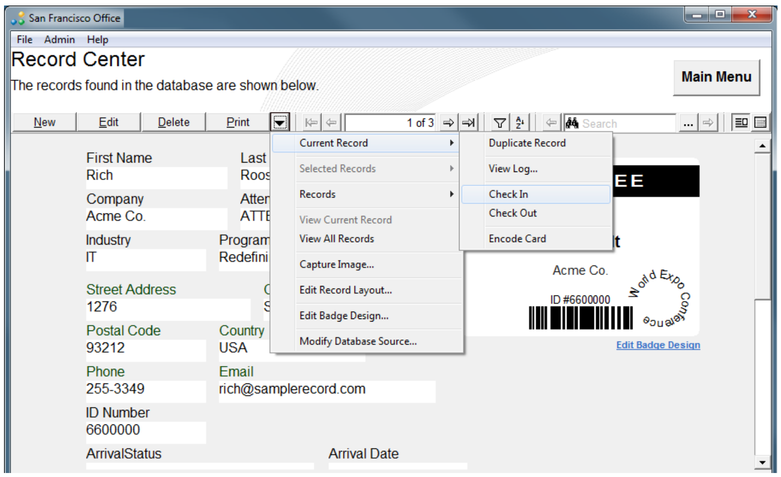
Workstation Profiles / Saving Workstation Options

Once the workstation is configured, the settings may be saved as a workstation profile. Profiles are used to quickly deploy the same configuration across multiple workstations. However, profiles may vary across a system: For example, there may be Front Desk, a Self-enrollment Kiosk and Check-in Station profiles all used together.

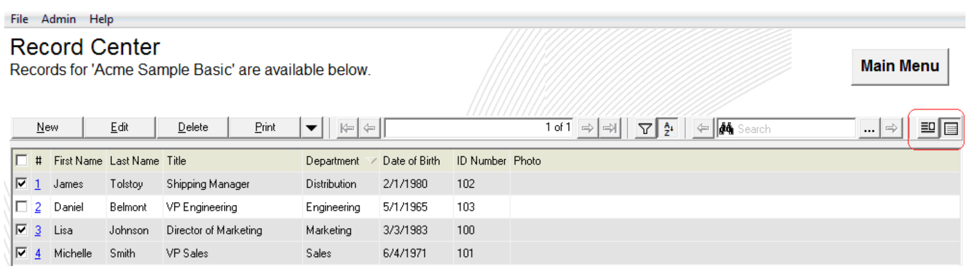


Record Center

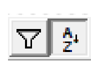
Record Center is used for the management of records. Records may be added, edited, deleted, printed and duplicated from this screen. The down-arrow button provides additional options.

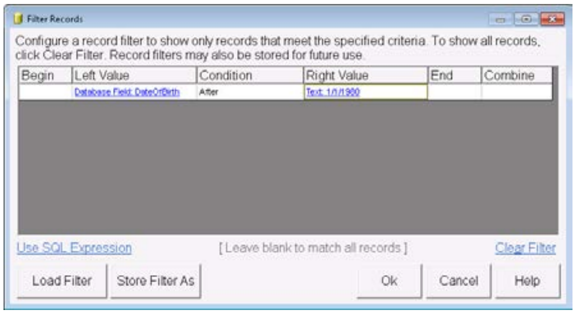


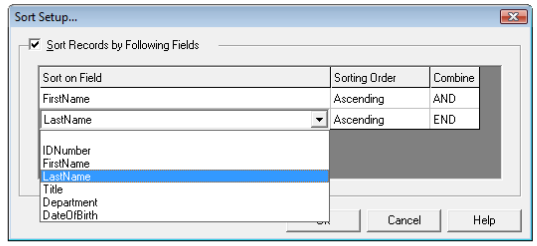
Records may be viewed in single-record or spreadsheet view by selecting the buttons on the right of the toolbar.



Records may be batch printed, deleted and edited by checking the box to the left of the record and selecting the appropriate action. Records may be sorted by clicking on column headers.

The toolbar contains *filter* and *sort* buttons . Filters are used to create data subsets. Sorting allows for multiple field sort criteria.

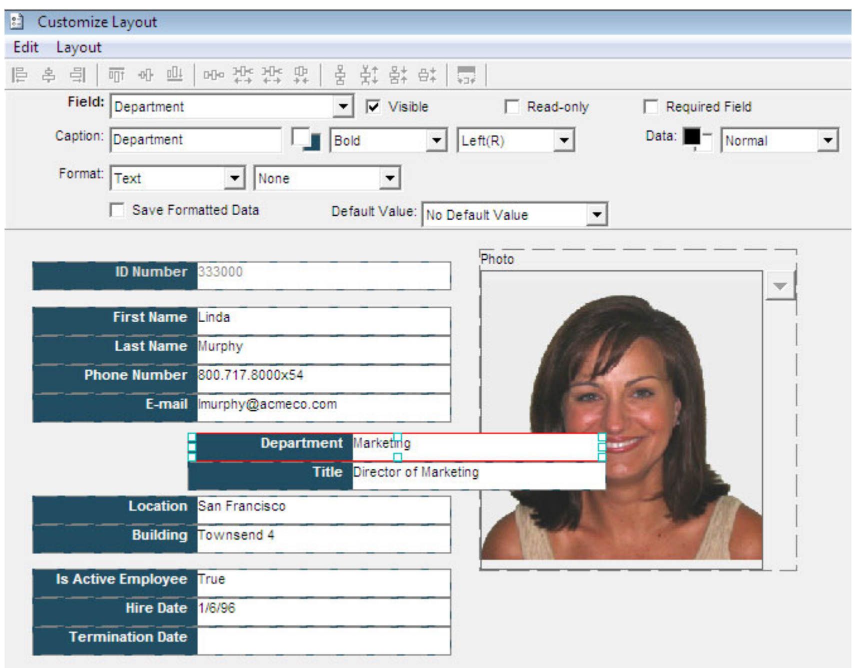




Configuring the Record Screen

Time Track has drag-and-drop record screen formatting. Select *Edit Record Layout* from the down-arrow menu on the *Record Screen*: Size and move fields with the mouse. Caption placement, colors, alignment tools and other formatting options are provided on the menu bar.

Formatting options vary by edition. They may be given default values. Drop-down lists may be created. Text can be set to Capitalize, UPPER CASE or lower case. Image paths may be created to store variable images to file.



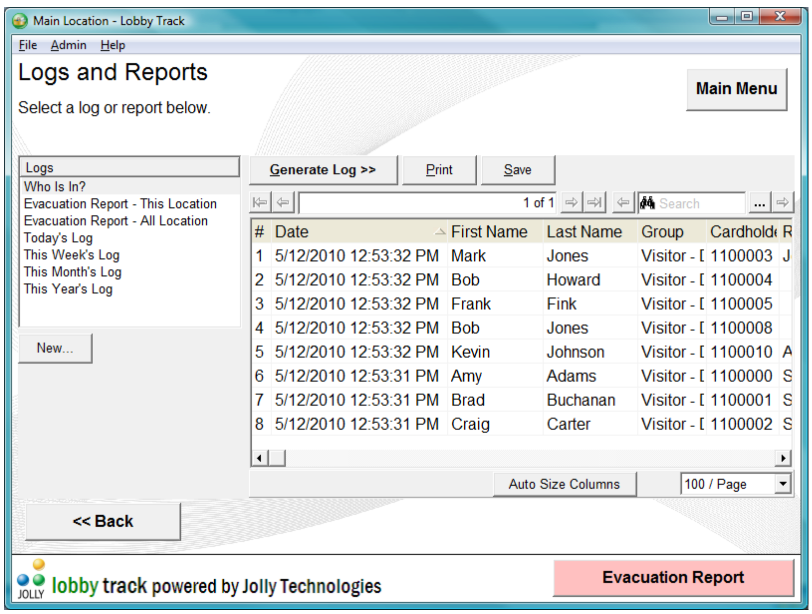
Report Center

There are several reports built into *Report Center* and an additional evacuation report available on all screens.

Visibility of these features is set in the Logs and Reports area of the *Workstation Options*.

Logs and Reports

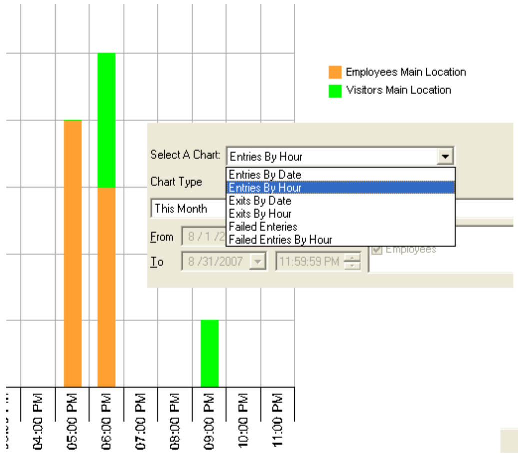
Time Track contains seven built-in reports. Custom reports can be added by selecting *New* and configuring the *Custom Log Setup*.



Reports may be printed or saved to a file.

Charts

Charts give a graphical representation of who has checked into the facility on what hours, days, and months.



Query Records

Queries are used to pull all or a subset of records from the database. They are commonly used to export records. They may be named and saved for re-use. Queries designed in *Query Records* may be invoked in Record Center using the Filter Records function.

Evacuation Report

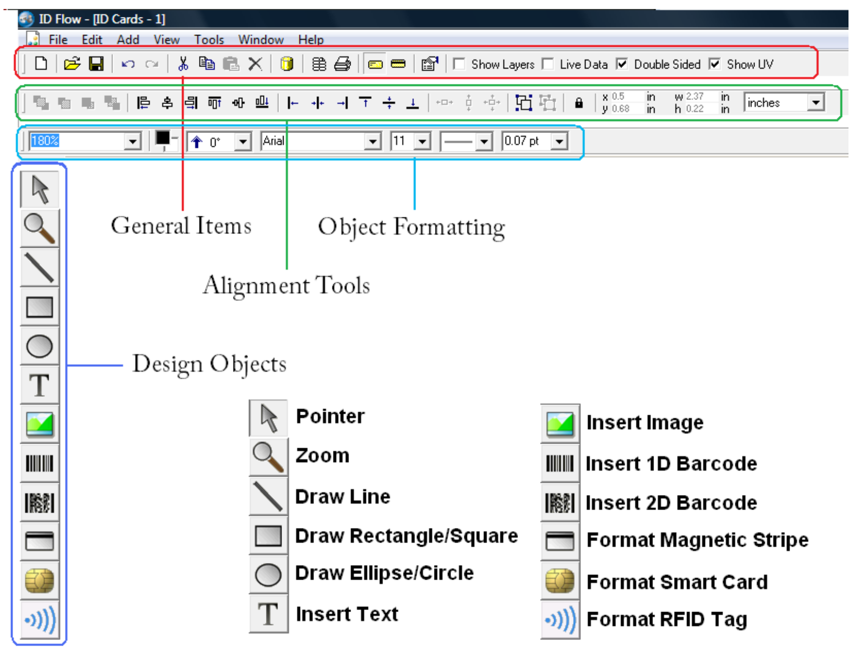
The *Evacuation Report* lists all employees in all employee groups that are checked in at the current location. This report is available by selecting the button at the bottom of every page.

ID Flow Card Designer

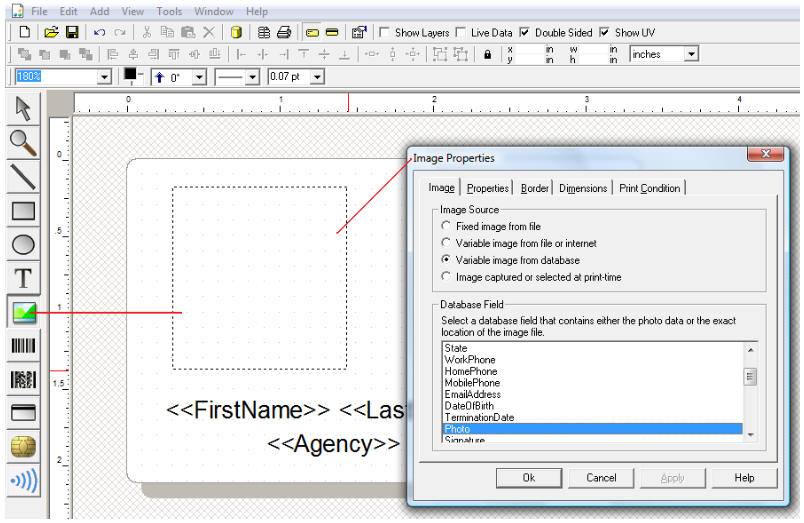
Time Track contains an integrated version of Jolly Technologies leading ID card product: ID Flow for the design of sophisticated ID cards and cards.

Design Screen

The design screen contains four toolbars: general items, alignment tools, design objects and object formatting.



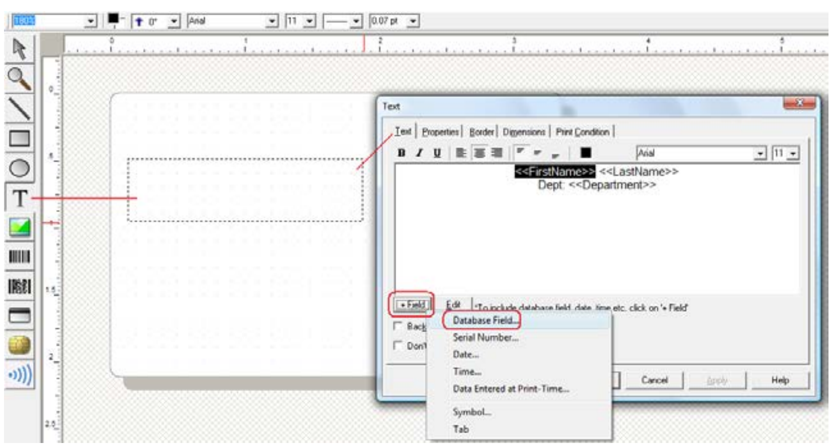
Cards are designed by selecting the design object on the left-hand toolbar and by drawing that object's area on the card with the mouse. After the area drawn the object's *Properties* dialog will appear. Click through the tabs to format the object.



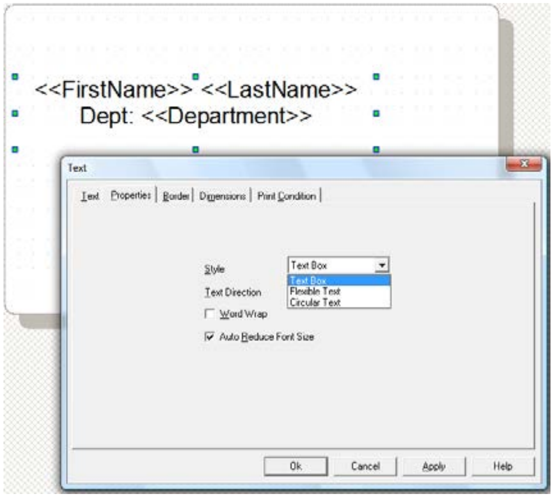
Objects may be resized at any time and *Properties* dialog re-accessed by double-click.

Working with Text

ID Flow contains rich text editing. Regular text, database text, serial number, date and time may be combined within one text box. Type with a keyboard or use the *+ Field* button for text selections.



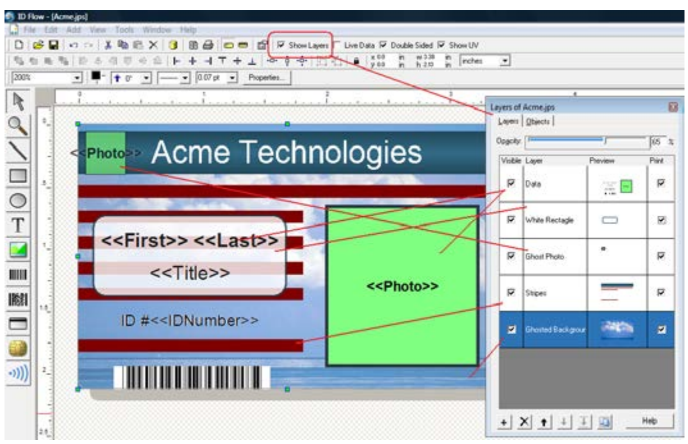
There are three types of text formatting: Text Box, Flexible Text and Circular Text. *Text Box* will always place text within the bounds of the box drawn in the design: If larger, it will auto-reduce in font size or word wrap. *Flexible Text* will maintain font size regardless of the size of the box drawn. *Circular Text* formats text in a circle.



Working with Layers

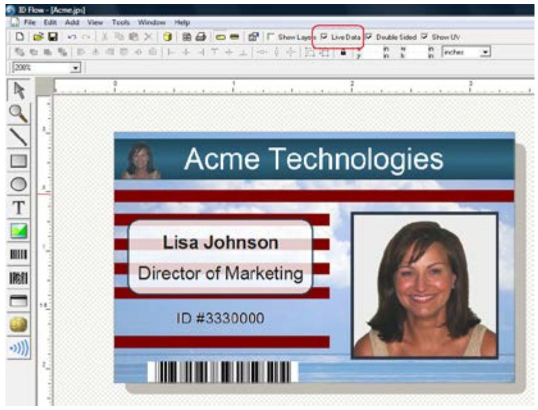
Like other quality graphical design tools, ID Flow uses a layered design approach. Layers may contain different design objects of varying opacity. Using layers adds a rich depth to design and creates highly secure cards.

To see the layers window click the *Show Layers* checkbox on the top menu bar. Layers are added using the [+] button at the bottom of the window. Use the arrow buttons to move layers above and below other layers. Click the *Print* checkbox on each layer to format its print condition. The active design layer is highlighted blue.

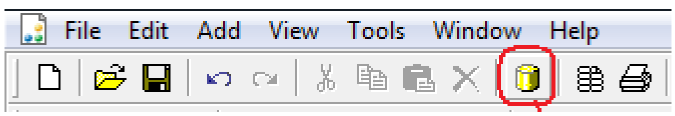


Viewing Designs with Live Data

At anytime the card design may be viewed with data by checking the *Live Data* button on the top menu bar:

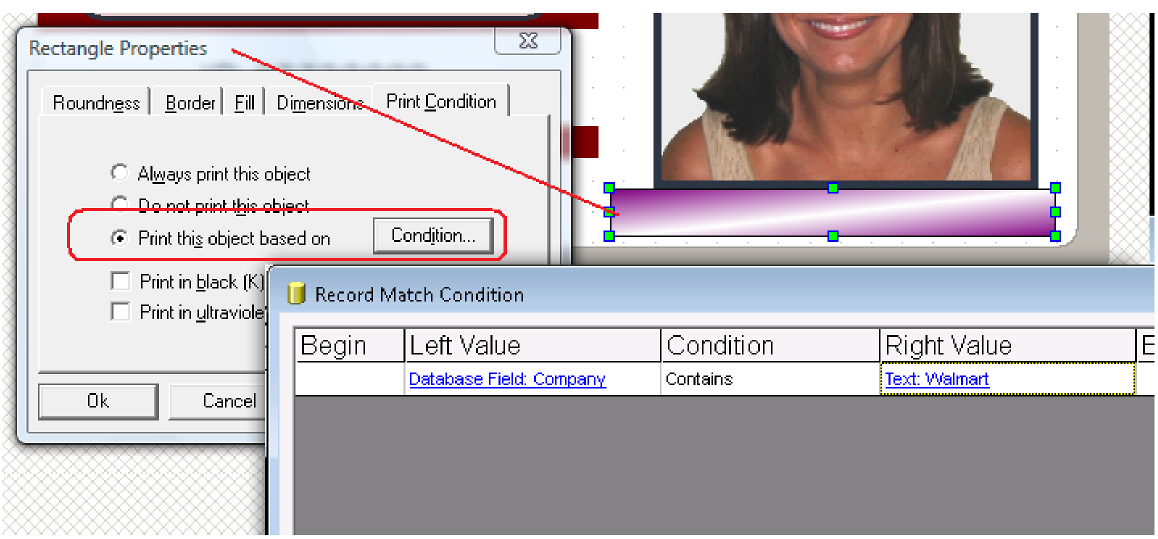


To view the full record set: go to *File -> Database Setup* or click the data icon on the top menu bar:



Working with Print Conditions

Design objects or design layers may be set to print only if specific database conditions are met. Print conditions are set on the *Print Conditions* tab of the object's properties dialog. K Panel (Black Panel) and UV Panel are also set on this tab.



Saving a File

Use *File -> Save* or *Save as…* to save and name the design. ID Flow files are saved with a .jps extension. Though cards can be printed from the design screen or *Database Setup*, design files are typically imported into the *Card Issue Center* for production.