



Understanding & Leveraging TLM

In this session, we'll cover some of the common issues users experience with TLM and provide steps and strategies to resolve them.



2023 Asure Reseller Partner Conference



Speakers Introduction



AJ Wasielewski

Product Owner,
Time & Attendance



Bob Gryta

TLM Reseller Partner
Manager

Session Agenda

01

Holiday Setup

02

Pay Calendar Setup

03

Payroll Tab operations

04

Supervisor Leave Requests - Mobile

05

Password reset

06

IP Restrictions

Session Agenda

07

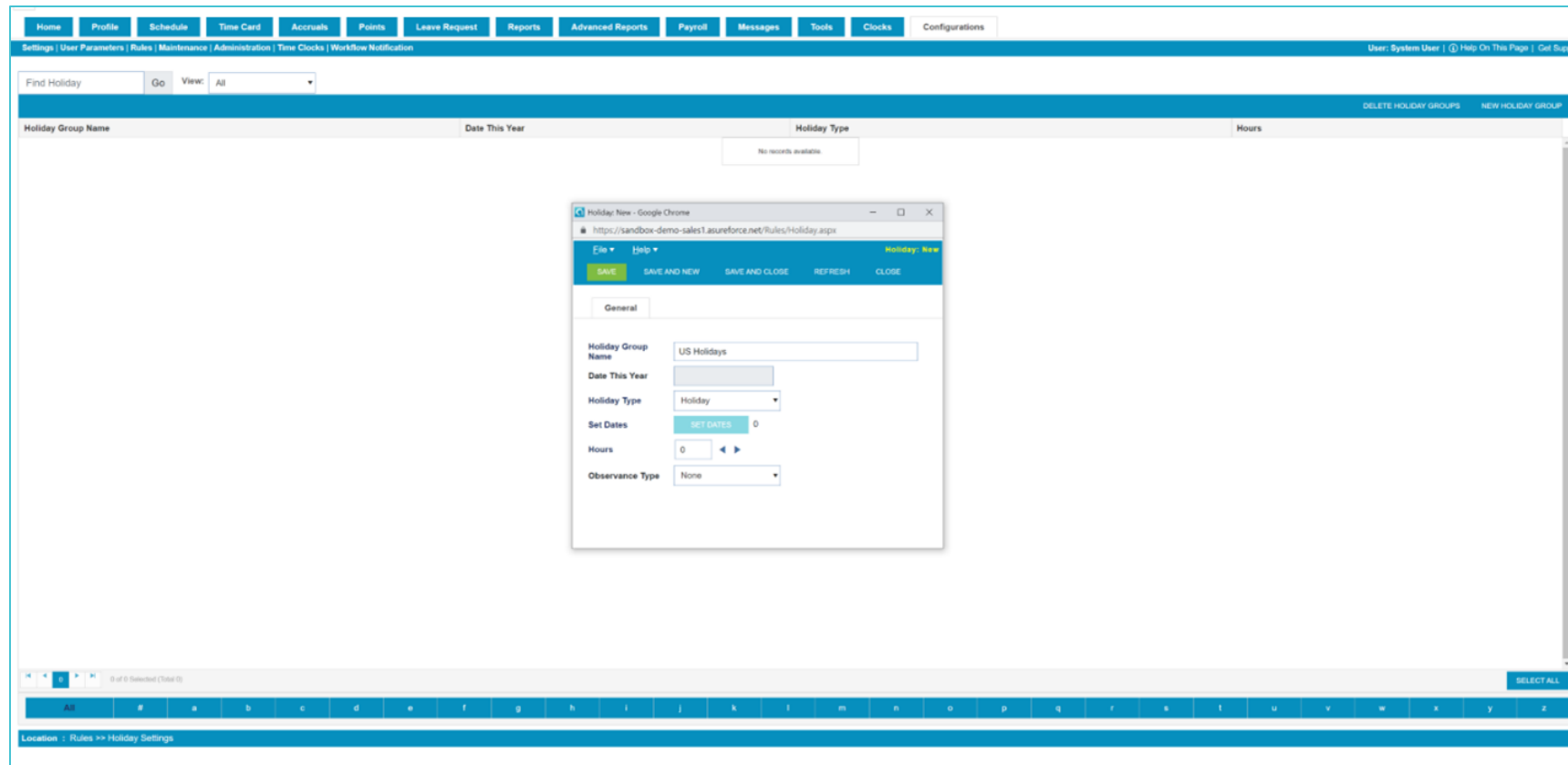
Use insert punch vs typing
in when crossing days

08

Access the Support Portal



Holiday Setup



The screenshot displays the 'Holiday Setup' interface. At the top, there is a navigation bar with various menu items like Home, Profile, Schedule, etc. Below this is a breadcrumb trail: Settings > User Parameters > Rules > Maintenance > Administration > Time Clocks > Workflow Notification. A search bar for 'Find Holiday' is present. The main content area shows a table with columns: Holiday Group Name, Date This Year, Holiday Type, and Hours. A modal window titled 'Holiday - New' is open, showing the following fields:

- Holiday Group Name: US Holidays
- Date This Year: [Empty]
- Holiday Type: Holiday
- Set Dates: SET DATES 0
- Hours: 0
- Observance Type: None

Buttons in the modal include SAVE, SAVE AND NEW, SAVE AND CLOSE, REFRESH, and CLOSE. The bottom of the screen shows a keyboard layout and a 'SELECT ALL' button.

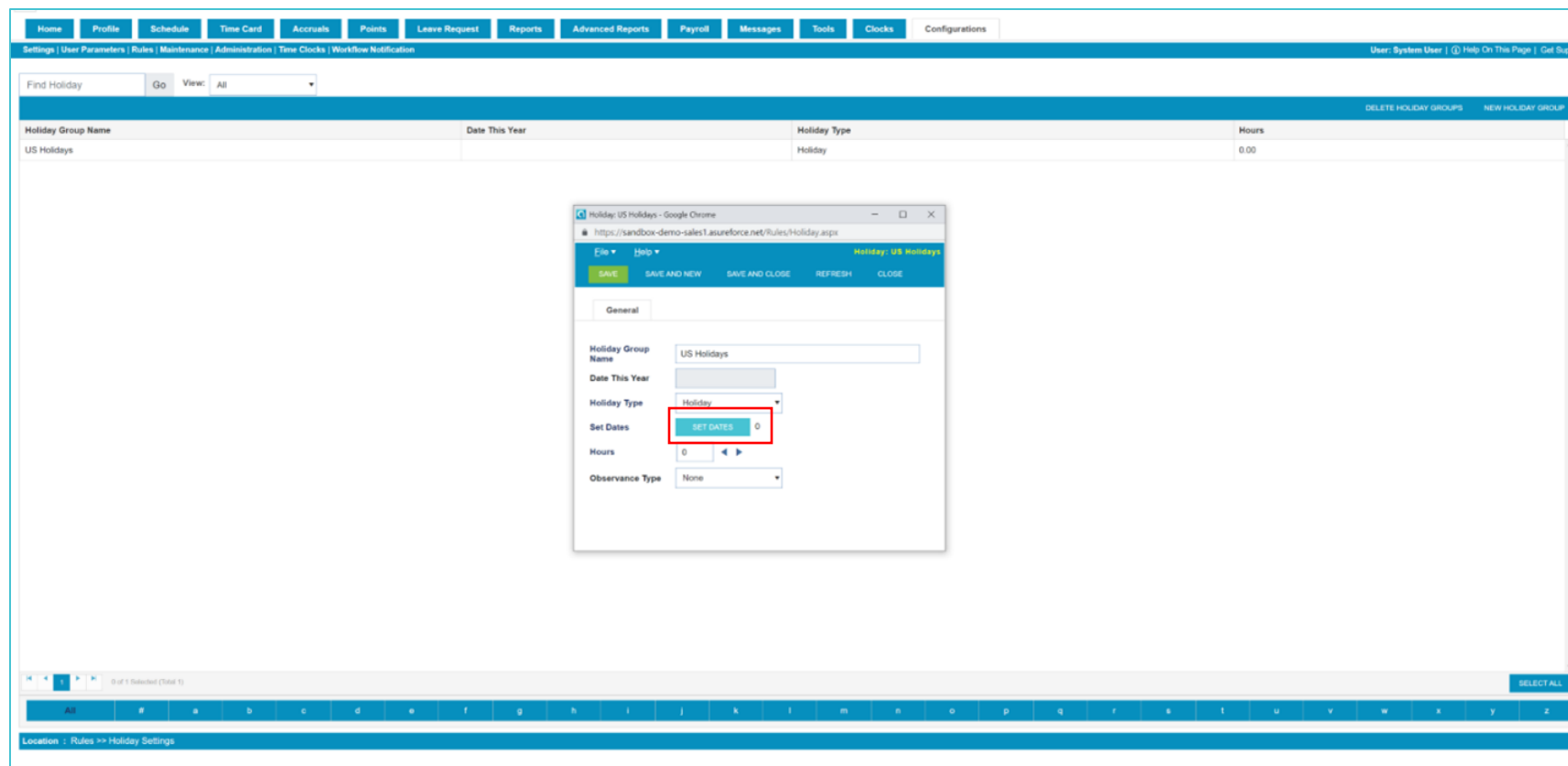
- Holiday day vs Special Day

The special day is treated exactly like a holiday except that the qualification rules can be changed. Note that this setting can later be changed at the pay group level.

- Creating new Holiday Calendar

Configurations > Rules > Holiday Settings >> New Holiday Group

Holiday Setup



The screenshot displays the 'Holiday Setup' interface. At the top, there is a navigation bar with tabs for Home, Profile, Schedule, Time Card, Accruals, Points, Leave Request, Reports, Advanced Reports, Payroll, Messages, Tools, Clocks, and Configurations. Below this is a breadcrumb trail: Settings | User Parameters | Rules | Maintenance | Administration | Time Clocks | Workflow Notification. A search bar for 'Find Holiday' is present. The main content area shows a table with the following data:

Holiday Group Name	Date This Year	Holiday Type	Hours
US Holidays		Holiday	0.00

A modal window titled 'Holiday: US Holidays' is open, showing the 'General' tab. The fields are:

- Holiday Group Name: US Holidays
- Date This Year: [Empty]
- Holiday Type: Holiday
- Set Dates: [Empty] (highlighted with a red box)
- Hours: 0
- Observance Type: None

Buttons at the top of the modal include: SAVE, SAVE AND NEW, SAVE AND CLOSE, REFRESH, and CLOSE. A 'SET DATES' button is located next to the 'Set Dates' field. The bottom of the modal shows '0 of 1 Selected (Total 1)' and a 'SELECT ALL' button. The bottom of the main window shows a location path: Location : Rules >> Holiday Settings.

After Entering 'Holiday Group Name', click Save. This allows you to Set Dates.



Holiday Setup

-Adding dates to calendar – should do this as end of year process

Select Holiday Group Dates
Double click to add a new date to this holiday group. Double click to remove an existing date from this holiday group.

Year : 2023 SHOW

Dates in this holiday group Dates part of other holiday groups

Jan	Feb	Mar	Apr
M T W T F S S	M T W T F S S	M T W T F S S	M T W T F S S
1	1 2 3 4 5	1 2 3 4 5	1 2
2 3 4 5 6 7 8	6 7 8 9 10 11 12	6 7 8 9 10 11 12	3 4 5 6 7 8 9
9 10 11 12 13 14 15	13 14 15 16 17 18 19	13 14 15 16 17 18 19	10 11 12 13 14 15 16
16 17 18 19 20 21 22	20 21 22 23 24 25 26	20 21 22 23 24 25 26	17 18 19 20 21 22 23
23 24 25 26 27 28 29	27 28	27 28 29 30 31	24 25 26 27 28 29 30
30 31			
May	Jun	Jul	Aug
M T W T F S S	M T W T F S S	M T W T F S S	M T W T F S S
1 2 3 4 5 6 7	1 2 3 4	1 2	1 2 3 4 5 6
8 9 10 11 12 13 14	5 6 7 8 9 10 11	3 4 5 6 7 8 9	7 8 9 10 11 12 13
15 16 17 18 19 20 21	12 13 14 15 16 17 18	10 11 12 13 14 15 16	14 15 16 17 18 19 20
22 23 24 25 26 27 28	19 20 21 22 23 24 25	17 18 19 20 21 22 23	21 22 23 24 25 26 27
29 30 31	26 27 28 29 30	24 25 26 27 28 29 30	28 29 30 31
		31	
Sep	Oct	Nov	Dec
M T W T F S S	M T W T F S S	M T W T F S S	M T W T F S S
1 2 3	1	1 2 3 4 5	1 2 3
4 5 6 7 8 9 10	2 3 4 5 6 7 8	6 7 8 9 10 11 12	4 5 6 7 8 9 10
11 12 13 14 15 16 17	9 10 11 12 13 14 15	13 14 15 16 17 18 19	11 12 13 14 15 16 17
18 19 20 21 22 23 24	16 17 18 19 20 21 22	20 21 22 23 24 25 26	18 19 20 21 22 23 24
25 26 27 28 29 30	23 24 25 26 27 28 29	27 28 29 30	25 26 27 28 29 30 31
	30 31		

OK CANCEL

Select Holiday Group Dates
Double click to add a new date to this holiday group. Double click to remove an existing date from this holiday group.

Year : 2023 SHOW

Dates in this holiday group Dates part of other holiday groups

sandbox-demo-sales1.asureforce.net says
Create Entry for 07/04/2023?

OK Cancel

Jan	Feb	Mar	Apr
M T W T F S S	M T W T F S S	M T W T F S S	M T W T F S S
1	1 2 3 4 5	1 2 3 4 5	1 2
2 3 4 5 6 7 8	6 7 8 9 10 11 12	6 7 8 9 10 11 12	3 4 5 6 7 8 9
9 10 11 12 13 14 15	13 14 15 16 17 18 19	13 14 15 16 17 18 19	10 11 12 13 14 15 16
16 17 18 19 20 21 22	20 21 22 23 24 25 26	20 21 22 23 24 25 26	17 18 19 20 21 22 23
23 24 25 26 27 28 29	27 28	27 28 29 30 31	24 25 26 27 28 29 30
30 31			
May	Jun	Jul	Aug
M T W T F S S	M T W T F S S	M T W T F S S	M T W T F S S
1 2 3 4 5 6 7	1 2 3 4	1 2	1 2 3 4 5 6
8 9 10 11 12 13 14	5 6 7 8 9 10 11	3 4 5 6 7 8 9	7 8 9 10 11 12 13
15 16 17 18 19 20 21	12 13 14 15 16 17 18	10 11 12 13 14 15 16	14 15 16 17 18 19 20
22 23 24 25 26 27 28	19 20 21 22 23 24 25	17 18 19 20 21 22 23	21 22 23 24 25 26 27
29 30 31	26 27 28 29 30	24 25 26 27 28 29 30	28 29 30 31
		31	
Sep	Oct	Nov	Dec
M T W T F S S	M T W T F S S	M T W T F S S	M T W T F S S
1 2 3	1	1 2 3 4 5	1 2 3
4 5 6 7 8 9 10	2 3 4 5 6 7 8	6 7 8 9 10 11 12	4 5 6 7 8 9 10
11 12 13 14 15 16 17	9 10 11 12 13 14 15	13 14 15 16 17 18 19	11 12 13 14 15 16 17
18 19 20 21 22 23 24	16 17 18 19 20 21 22	20 21 22 23 24 25 26	18 19 20 21 22 23 24
25 26 27 28 29 30	23 24 25 26 27 28 29	27 28 29 30	25 26 27 28 29 30 31
	30 31		

OK CANCEL

Select Holiday Group Dates
Double click to add a new date to this holiday group. Double click to remove an existing date from this holiday group.

Year : 2023 SHOW

Dates in this holiday group Dates part of other holiday groups

Jan	Feb	Mar	Apr
M T W T F S S	M T W T F S S	M T W T F S S	M T W T F S S
1	1 2 3 4 5	1 2 3 4 5	1 2
2 3 4 5 6 7 8	6 7 8 9 10 11 12	6 7 8 9 10 11 12	3 4 5 6 7 8 9
9 10 11 12 13 14 15	13 14 15 16 17 18 19	13 14 15 16 17 18 19	10 11 12 13 14 15 16
16 17 18 19 20 21 22	20 21 22 23 24 25 26	20 21 22 23 24 25 26	17 18 19 20 21 22 23
23 24 25 26 27 28 29	27 28	27 28 29 30 31	24 25 26 27 28 29 30
30 31			
May	Jun	Jul	Aug
M T W T F S S	M T W T F S S	M T W T F S S	M T W T F S S
1 2 3 4 5 6 7	1 2 3 4	1 2	1 2 3 4 5 6
8 9 10 11 12 13 14	5 6 7 8 9 10 11	3 4 5 6 7 8 9	7 8 9 10 11 12 13
15 16 17 18 19 20 21	12 13 14 15 16 17 18	10 11 12 13 14 15 16	14 15 16 17 18 19 20
22 23 24 25 26 27 28	19 20 21 22 23 24 25	17 18 19 20 21 22 23	21 22 23 24 25 26 27
29 30 31	26 27 28 29 30	24 25 26 27 28 29 30	28 29 30 31
		31	
Sep	Oct	Nov	Dec
M T W T F S S	M T W T F S S	M T W T F S S	M T W T F S S
1 2 3	1	1 2 3 4 5	1 2 3
4 5 6 7 8 9 10	2 3 4 5 6 7 8	6 7 8 9 10 11 12	4 5 6 7 8 9 10
11 12 13 14 15 16 17	9 10 11 12 13 14 15	13 14 15 16 17 18 19	11 12 13 14 15 16 17
18 19 20 21 22 23 24	16 17 18 19 20 21 22	20 21 22 23 24 25 26	18 19 20 21 22 23 24
25 26 27 28 29 30	23 24 25 26 27 28 29	27 28 29 30	25 26 27 28 29 30 31
	30 31		

OK CANCEL

Holiday Setup

-Adding dates to calendar – should do this as end of year process

File Help **Holiday: US Holidays**

SAVE SAVE AND NEW SAVE AND CLOSE REFRESH CLOSE

General

Holiday Group Name: US Holidays

Date This Year: 07/04/2023

Holiday Type: Holiday

Set Dates: SET DATES 1

Hours: 0

Observance Type: None

File Help **Holiday: Canada Holidays**

SAVE SAVE AND NEW SAVE AND CLOSE REFRESH CLOSE

General

Holiday Group Name: Canada Holidays

Date This Year:

Holiday Type: Holiday

Set Dates: SET DATES 0

Hours: 0

Observance Type: None

Select Holiday Group Dates

Double click to add a new date to this holiday group. Double click to remove an existing date from this holiday group.

Year: 2023 SHOW

Dates in this holiday group (green square) Dates part of other holiday groups (red square)

Jan	Feb	Mar	Apr
M T W T F S S 1	M T W T F S S 1 2 3 4 5	M T W T F S S 1 2 3 4 5	M T W T F S S 1 2
2 3 4 5 6 7 8	6 7 8 9 10 11 12	6 7 8 9 10 11 12	3 4 5 6 7 8 9
9 10 11 12 13 14 15	13 14 15 16 17 18 19	13 14 15 16 17 18 19	10 11 12 13 14 15 16
16 17 18 19 20 21 22	20 21 22 23 24 25 26	20 21 22 23 24 25 26	17 18 19 20 21 22 23
23 24 25 26 27 28 29	27 28	27 28 29 30 31	24 25 26 27 28 29 30
30 31			
May	Jun	Jul	Aug
M T W T F S S 1 2 3 4 5 6 7	M T W T F S S 1 2 3 4	M T W T F S S 1 2	M T W T F S S 1 2 3 4 5 6
8 9 10 11 12 13 14	5 6 7 8 9 10 11	3 4 5 6 7 8 9	7 8 9 10 11 12 13
15 16 17 18 19 20 21	12 13 14 15 16 17 18	10 11 12 13 14 15 16	14 15 16 17 18 19 20
22 23 24 25 26 27 28	19 20 21 22 23 24 25	17 18 19 20 21 22 23	21 22 23 24 25 26 27
29 30 31	26 27 28 29 30	24 25 26 27 28 29 30 31	28 29 30 31
Sep	Oct	Nov	Dec
M T W T F S S 1 2 3	M T W T F S S 1	M T W T F S S 1 2 3 4 5	M T W T F S S 1 2 3
4 5 6 7 8 9 10	2 3 4 5 6 7 8	6 7 8 9 10 11 12	4 5 6 7 8 9 10
11 12 13 14 15 16 17	9 10 11 12 13 14 15	13 14 15 16 17 18 19	11 12 13 14 15 16 17
18 19 20 21 22 23 24	16 17 18 19 20 21 22	20 21 22 23 24 25 26	18 19 20 21 22 23 24
25 26 27 28 29 30	23 24 25 26 27 28 29 30 31	27 28 29 30	25 26 27 28 29 30 31

OK CANCEL

Holiday Setup

-Adding dates to calendar – should do this as end of year process

Select Holiday Group
Double click to add this holiday group

sandbox-demo-sales1.asureforce.net says
Create Entry for 07/01/2023?

Year: 2023

OK Cancel

Jan	Feb	Mar	Apr
M T W T F S S	M T W T F S S	M T W T F S S	M T W T F S S
1	1 2 3 4 5	1 2 3 4 5	1 2
2 3 4 5 6 7 8	6 7 8 9 10 11 12	6 7 8 9 10 11 12	3 4 5 6 7 8 9
9 10 11 12 13 14 15	13 14 15 16 17 18 19	13 14 15 16 17 18 19	10 11 12 13 14 15 16
16 17 18 19 20 21 22	20 21 22 23 24 25 26	20 21 22 23 24 25 26	17 18 19 20 21 22 23
23 24 25 26 27 28 29	27 28	27 28 29 30 31	24 25 26 27 28 29 30
30 31			
May	Jun	Jul	Aug
M T W T F S S	M T W T F S S	M T W T F S S	M T W T F S S
1 2 3 4 5 6 7	1 2 3 4	1 1 1	1 2 3 4 5 6
8 9 10 11 12 13 14	5 6 7 8 9 10 11	3 4 5 6 7 8 9	7 8 9 10 11 12 13
15 16 17 18 19 20 21	12 13 14 15 16 17 18	10 11 12 13 14 15 16	14 15 16 17 18 19 20
22 23 24 25 26 27 28	19 20 21 22 23 24 25	17 18 19 20 21 22 23	21 22 23 24 25 26 27
29 30 31	26 27 28 29 30	24 25 26 27 28 29 30	28 29 30 31
Sep	Oct	Nov	Dec
M T W T F S S	M T W T F S S	M T W T F S S	M T W T F S S
1 2 3	1	1 2 3 4 5	1 2 3
4 5 6 7 8 9 10	2 3 4 5 6 7 8	6 7 8 9 10 11 12	4 5 6 7 8 9 10
11 12 13 14 15 16 17	9 10 11 12 13 14 15	13 14 15 16 17 18 19	11 12 13 14 15 16 17
18 19 20 21 22 23 24	16 17 18 19 20 21 22	20 21 22 23 24 25 26	18 19 20 21 22 23 24
25 26 27 28 29 30	23 24 25 26 27 28 29	27 28 29 30	25 26 27 28 29 30 31
30 31	30 31		

OK CANCEL

Select Holiday Group Dates
Double click to add a new date to this holiday group. Double click to remove an existing date from this holiday group.

Year: 2023

SHOW

Dates in this holiday group

Dates part of other holiday groups

Jan	Feb	Mar	Apr
M T W T F S S	M T W T F S S	M T W T F S S	M T W T F S S
1	1 2 3 4 5	1 2 3 4 5	1 2
2 3 4 5 6 7 8	6 7 8 9 10 11 12	6 7 8 9 10 11 12	3 4 5 6 7 8 9
9 10 11 12 13 14 15	13 14 15 16 17 18 19	13 14 15 16 17 18 19	10 11 12 13 14 15 16
16 17 18 19 20 21 22	20 21 22 23 24 25 26	20 21 22 23 24 25 26	17 18 19 20 21 22 23
23 24 25 26 27 28 29	27 28	27 28 29 30 31	24 25 26 27 28 29 30
30 31			
May	Jun	Jul	Aug
M T W T F S S	M T W T F S S	M T W T F S S	M T W T F S S
1 2 3 4 5 6 7	1 2 3 4	1 2 3 4 5	1 2 3 4 5 6
8 9 10 11 12 13 14	5 6 7 8 9 10 11	3 4 5 6 7 8 9	7 8 9 10 11 12 13
15 16 17 18 19 20 21	12 13 14 15 16 17 18	10 11 12 13 14 15 16	14 15 16 17 18 19 20
22 23 24 25 26 27 28	19 20 21 22 23 24 25	17 18 19 20 21 22 23	21 22 23 24 25 26 27
29 30 31	26 27 28 29 30	24 25 26 27 28 29 30	28 29 30 31
Sep	Oct	Nov	Dec
M T W T F S S	M T W T F S S	M T W T F S S	M T W T F S S
1 2 3	1	1 2 3 4 5	1 2 3
4 5 6 7 8 9 10	2 3 4 5 6 7 8	6 7 8 9 10 11 12	4 5 6 7 8 9 10
11 12 13 14 15 16 17	9 10 11 12 13 14 15	13 14 15 16 17 18 19	11 12 13 14 15 16 17
18 19 20 21 22 23 24	16 17 18 19 20 21 22	20 21 22 23 24 25 26	18 19 20 21 22 23 24
25 26 27 28 29 30	23 24 25 26 27 28 29	27 28 29 30	25 26 27 28 29 30 31
30 31	30 31		

OK CANCEL

Select Holiday Group Dates
Double click to add a new date to this holiday group. Double click to remove an existing date from this holiday group.

Year: 2023

SHOW

Dates in this holiday group

Dates part of other holiday groups

Jan	Feb	Mar	Apr
M T W T F S S	M T W T F S S	M T W T F S S	M T W T F S S
1	1 2 3 4 5	1 2 3 4 5	1 2
2 3 4 5 6 7 8	6 7 8 9 10 11 12	6 7 8 9 10 11 12	3 4 5 6 7 8 9
9 10 11 12 13 14 15	13 14 15 16 17 18 19	13 14 15 16 17 18 19	10 11 12 13 14 15 16
16 17 18 19 20 21 22	20 21 22 23 24 25 26	20 21 22 23 24 25 26	17 18 19 20 21 22 23
23 24 25 26 27 28 29	27 28	27 28 29 30 31	24 25 26 27 28 29 30
30 31			
May	Jun	Jul	Aug
M T W T F S S	M T W T F S S	M T W T F S S	M T W T F S S
1 2 3 4 5 6 7	1 2 3 4	1 2 3 4 5	1 2 3 4 5 6
8 9 10 11 12 13 14	5 6 7 8 9 10 11	3 4 5 6 7 8 9	7 8 9 10 11 12 13
15 16 17 18 19 20 21	12 13 14 15 16 17 18	10 11 12 13 14 15 16	14 15 16 17 18 19 20
22 23 24 25 26 27 28	19 20 21 22 23 24 25	17 18 19 20 21 22 23	21 22 23 24 25 26 27
29 30 31	26 27 28 29 30	24 25 26 27 28 29 30	28 29 30 31
Sep	Oct	Nov	Dec
M T W T F S S	M T W T F S S	M T W T F S S	M T W T F S S
1 2 3	1	1 2 3 4 5	1 2 3
4 5 6 7 8 9 10	2 3 4 5 6 7 8	6 7 8 9 10 11 12	4 5 6 7 8 9 10
11 12 13 14 15 16 17	9 10 11 12 13 14 15	13 14 15 16 17 18 19	11 12 13 14 15 16 17
18 19 20 21 22 23 24	16 17 18 19 20 21 22	20 21 22 23 24 25 26	18 19 20 21 22 23 24
25 26 27 28 29 30	23 24 25 26 27 28 29	27 28 29 30	25 26 27 28 29 30 31
30 31	30 31		

OK CANCEL

Holiday Setup

-Adding dates to calendar – should do this as end of year process

File ▾ Help ▾ Holiday: Canada Holidays

SAVE SAVE AND NEW SAVE AND CLOSE REFRESH CLOSE

General

Holiday Group Name

Date This Year

Holiday Type

Set Dates SET DATES 2

Hours ◀ ▶

Observance Type

Home Profile Schedule Time Card Accruals Leave Request Reports Payroll Messages Tools Clocks Configurations

Settings User Parameters Rules Maintenance Administration Time Clocks Workflow Notification
User: System User | Help On This Page | Get Support

Go View: All

Holiday Group Name	Date This Year	Holiday Type	Hours
Canada Holidays	07/01/2023 [+]	Holiday	0.00
US Holidays	07/04/2023	Holiday	0.00

SELECT ALL

Location: Rules >> Holiday Settings

Holiday Setup

-Where holiday calendars can be utilized in rules

File Help Holiday Rule: New

SAVE SAVE AND NEW SAVE AND CLOSE REFRESH CLOSE

General **Qualification** Applies To Miscellaneous

Rule ID: USHolidays Active

Rule Description: US Holidays

Day Type: Holiday

Holiday Dates: SELECT 0

Holiday Benefit Options

Scenario	Option	Hours	Multiplier	Expiration Date	Type
<input type="checkbox"/> Not Worked/Scheduled	<input checked="" type="radio"/> Pay <input type="radio"/> Accrue	None	1		...
<input type="checkbox"/> Not Worked/Not Scheduled	<input checked="" type="radio"/> Pay <input type="radio"/> Accrue	None	1		...

Select Holiday

Select the holiday groups on which you want to apply the rule.

<input type="checkbox"/> Holiday Group Name	Holiday Dates
<input type="checkbox"/> Canada Holidays	07/01/2023, 07/04/2023
<input type="checkbox"/> US Holidays	07/04/2023

OK CANCEL

Holiday Setup

-Where holiday calendars can be utilized in rules

Holiday Hours
Select Holiday Hours Type

- None
- Scheduled Hours
- Fixed Hours
- Employee/Fixed
- Worked

OK CANCEL

Holiday Rule: New

General | **Qualification** | Applies To | Miscellaneous

Rule ID: USHolidays Active

Rule Description: US Holidays

Day Type: Holiday

Holiday Dates: SELECT 1
US Holidays

Holiday Benefit Options

Scenario	Option	Hours	Multiplier	Expiration Date	Type
<input checked="" type="checkbox"/> Worked/Scheduled	<input checked="" type="radio"/> Pay <input type="radio"/> Accrue	Worked	1		OVT
<input checked="" type="checkbox"/> Worked/Not Scheduled	<input checked="" type="radio"/> Pay <input type="radio"/> Accrue	None	1		

Holiday Rule: USHolidays

General | **Qualification** | Applies To | Miscellaneous

Week/Period OT base deduction: None

Schedule as work day

Use Alternate Pay Type: ...

Use next scheduled day if not normally scheduled on this holiday

Holiday Setup

Holidays can be used referenced in premium rules

File ▾ Help ▾ Premium Rule: New

SAVE SAVE AND NEW SAVE AND CLOSE REFRESH CLOSE

General

Condition

Paid Sources

Pay

Applies To

Applies To

All Shifts

All Days SELECT DAYS 0

All Levels

All Pay types

Days Included

Scheduled

Non-Scheduled

Both

Select Days

Select the days with which you want to associate the rule.

Days

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

All Holidays

All Days Before Holidays

All Days After Holidays

No Holidays

End Of Pay Period

Holidays/Special Days

Description	Include Holiday	Include Day Before	Include Day After
US Holidays	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

OK
CANCEL

Holiday Setup

Holidays can be used referenced in overtime rules

File Help
Over Time Rule: New

SAVE
SAVE AND NEW
SAVE AND CLOSE
REFRESH
CLOSE

General
Applies To

Applies To

All Shifts

All Days SELECT DAYS 0

All Pay Types

All Levels

Employment

None

Current Date

Period Begin

Period End

Days Included

Scheduled

Non-Scheduled

Both

Other Conditions

Allocate OT first to hours worked outside home dept

Day CutOff None

Operating Mode Both

Select Days
 Select the days with which you want to associate the rule.

Days

Sunday All Holidays

Monday All Days Before Holidays

Tuesday All Days After Holidays

Wednesday

Thursday

Friday

Saturday End Of Pay Period

Holidays/Special Days

Description	Include Holiday	Include Day Before	Include Day After
US Holidays	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

OK
CANCEL

Pay Calendar Setup

How to setup a new pay calendar

Configurations > Rules > Pay Calendar >> New Pay Calendar

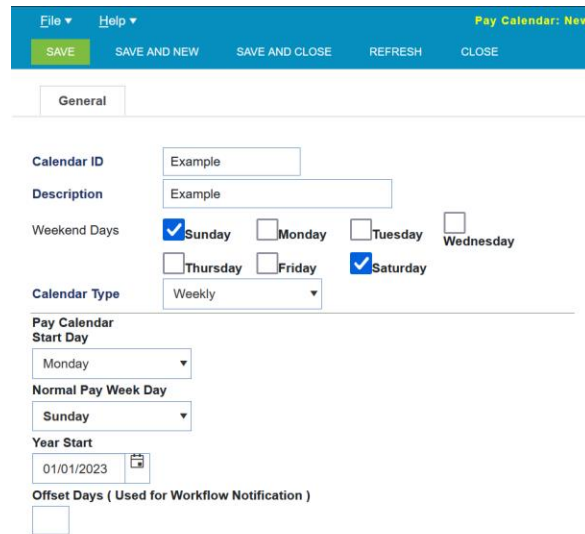
Home Profile Schedule Time Card Accruals Leave Request Reports Payroll Messages Tools Clocks Configurations

Settings | User Parameters | Rules | Maintenance | Administration | Time Clocks | Workflow Notification User: System User | Help On This Page | Get Support

Find Pay Calendar View: All

Pay Calendar ID	Description	Calendar Type	DELETED PAY CALENDAR	NEW PAY CALENDAR
BW	BiWeekly	Bi Weekly		
Custom	Custom	Custom		
Weekly	Weekly	Weekly		

Pay Calendar Setup

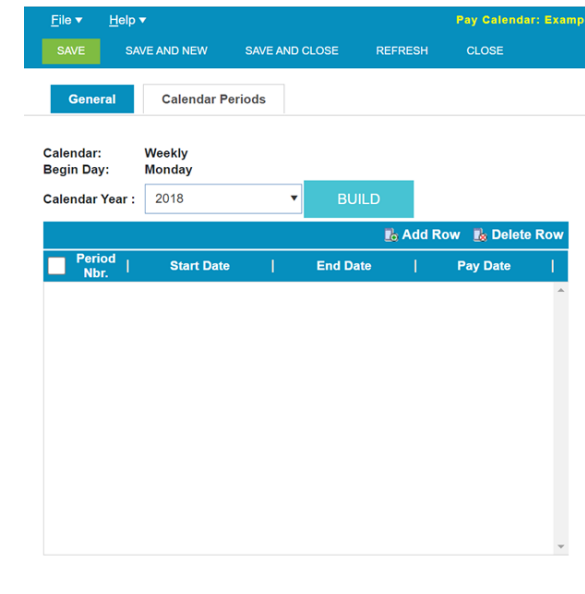


Select a Unique ID and Description.

Specify the days that are to be considered weekend days.

Specify the calendar type:

- Weekly
- Biweekly
- Monthly
- Semi-Monthly
- Custom



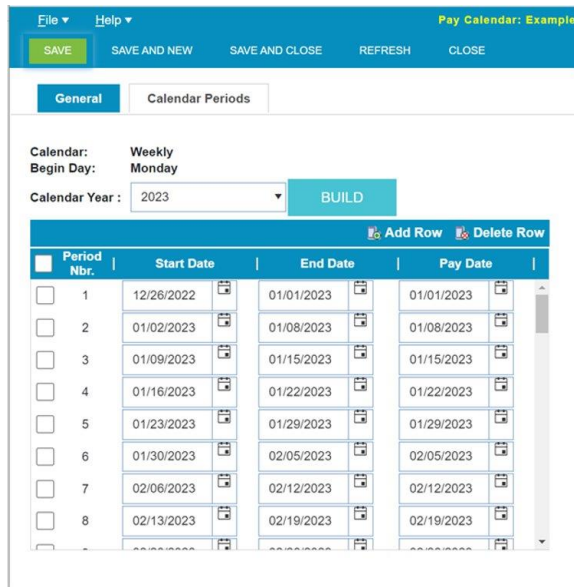
Period Nbr.	Start Date	End Date	Pay Date

After hitting Save, the Calendar Periods tab becomes available.

Select the needed Calendar Year and hit build. Be sure to save after the build completes.

Pay Calendar Setup

How to setup a new pay calendar



File Help Pay Calendar: Example

SAVE SAVE AND NEW SAVE AND CLOSE REFRESH CLOSE

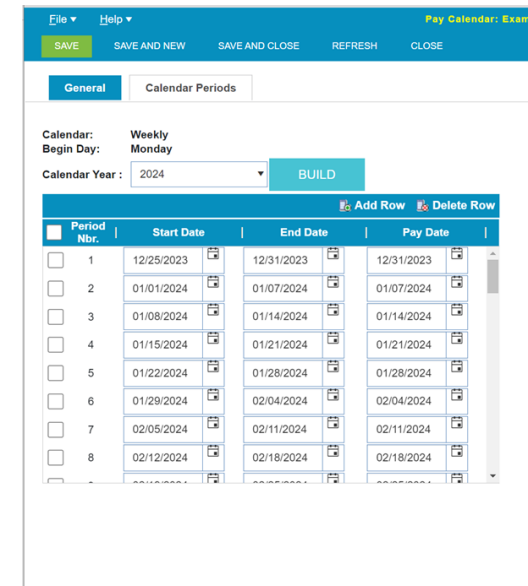
General Calendar Periods

Calendar: Weekly
Begin Day: Monday
Calendar Year: 2023 BUILD

Period Nbr.	Start Date	End Date	Pay Date
<input type="checkbox"/> 1	12/26/2022	01/01/2023	01/01/2023
<input type="checkbox"/> 2	01/02/2023	01/08/2023	01/08/2023
<input type="checkbox"/> 3	01/09/2023	01/15/2023	01/15/2023
<input type="checkbox"/> 4	01/16/2023	01/22/2023	01/22/2023
<input type="checkbox"/> 5	01/23/2023	01/29/2023	01/29/2023
<input type="checkbox"/> 6	01/30/2023	02/05/2023	02/05/2023
<input type="checkbox"/> 7	02/06/2023	02/12/2023	02/12/2023
<input type="checkbox"/> 8	02/13/2023	02/19/2023	02/19/2023

Select the needed Calendar Year and hit build.

Be sure to save after the build completes.



File Help Pay Calendar: Example

SAVE SAVE AND NEW SAVE AND CLOSE REFRESH CLOSE

General Calendar Periods

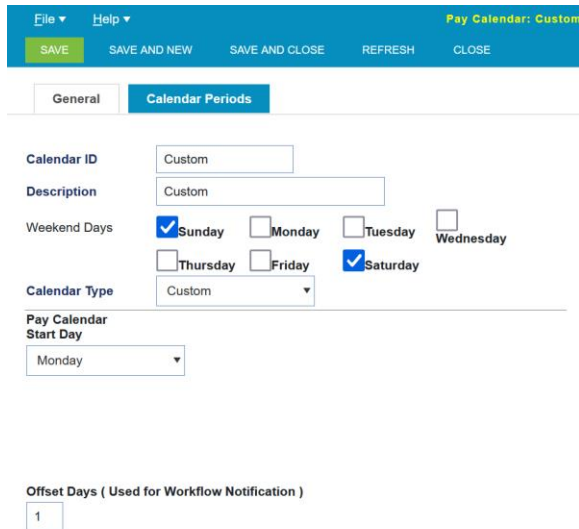
Calendar: Weekly
Begin Day: Monday
Calendar Year: 2024 BUILD

Period Nbr.	Start Date	End Date	Pay Date
<input type="checkbox"/> 1	12/25/2023	12/31/2023	12/31/2023
<input type="checkbox"/> 2	01/01/2024	01/07/2024	01/07/2024
<input type="checkbox"/> 3	01/08/2024	01/14/2024	01/14/2024
<input type="checkbox"/> 4	01/15/2024	01/21/2024	01/21/2024
<input type="checkbox"/> 5	01/22/2024	01/28/2024	01/28/2024
<input type="checkbox"/> 6	01/29/2024	02/04/2024	02/04/2024
<input type="checkbox"/> 7	02/05/2024	02/11/2024	02/11/2024
<input type="checkbox"/> 8	02/12/2024	02/18/2024	02/18/2024

Additional years can be built out by changing the calendar year in the drop down and selecting build, saving between builds.

Pay Calendar Setup

How to setup a Custom Calendar



File Help Pay Calendar: Custom
SAVE SAVE AND NEW SAVE AND CLOSE REFRESH CLOSE

General Calendar Periods

Calendar ID: Custom
Description: Custom

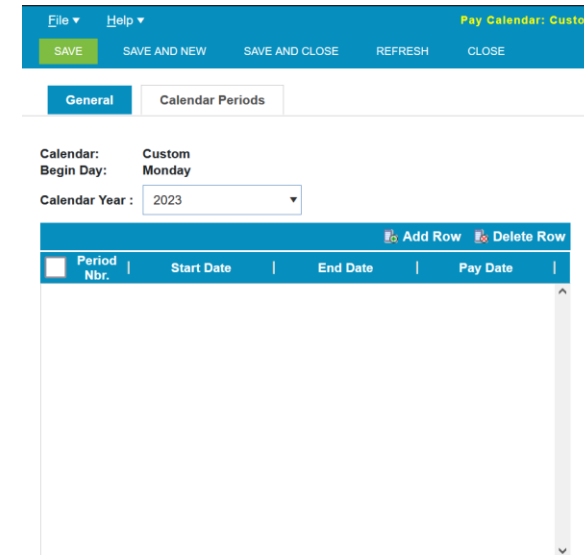
Weekend Days: Sunday Monday Tuesday Wednesday Thursday Friday Saturday

Calendar Type: Custom

Pay Calendar Start Day: Monday

Offset Days (Used for Workflow Notification)
1

The options for Custom calendar is limited to the Pay Calendar Start Day.



File Help Pay Calendar: Custom
SAVE SAVE AND NEW SAVE AND CLOSE REFRESH CLOSE

General Calendar Periods

Calendar: Custom
Begin Day: Monday
Calendar Year: 2023

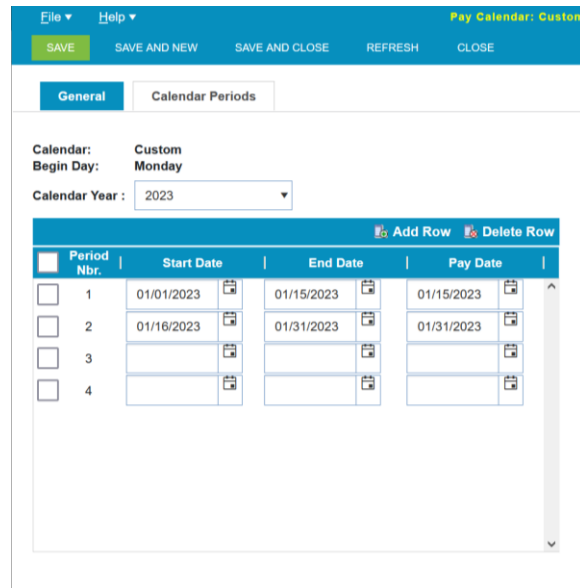
Add Row Delete Row

Period Nbr.	Start Date	End Date	Pay Date
-------------	------------	----------	----------

The Calendar Periodstab has no Build button.

Pay Calendar Setup

How to setup a Custom Calendar



File Help Pay Calendar: Custom

SAVE SAVE AND NEW SAVE AND CLOSE REFRESH CLOSE

General Calendar Periods

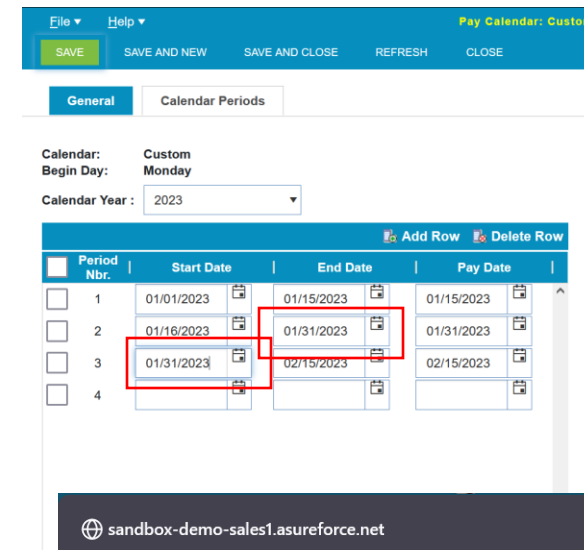
Calendar: Custom
Begin Day: Monday
Calendar Year: 2023

Add Row Delete Row

Period Nbr.	Start Date	End Date	Pay Date
1	01/01/2023	01/15/2023	01/15/2023
2	01/16/2023	01/31/2023	01/31/2023
3			
4			

Click Add Row to add the needed rows.

Fill in the Start Date, End Date and Pay Date for each of the pay periods.



File Help Pay Calendar: Custom

SAVE SAVE AND NEW SAVE AND CLOSE REFRESH CLOSE

General Calendar Periods

Calendar: Custom
Begin Day: Monday
Calendar Year: 2023

Add Row Delete Row

Period Nbr.	Start Date	End Date	Pay Date
1	01/01/2023	01/15/2023	01/15/2023
2	01/16/2023	01/31/2023	01/31/2023
3	01/31/2023	02/15/2023	02/15/2023
4			

The Calendar Periods tab has no Build button.

Dates cannot overlap or create gaps.

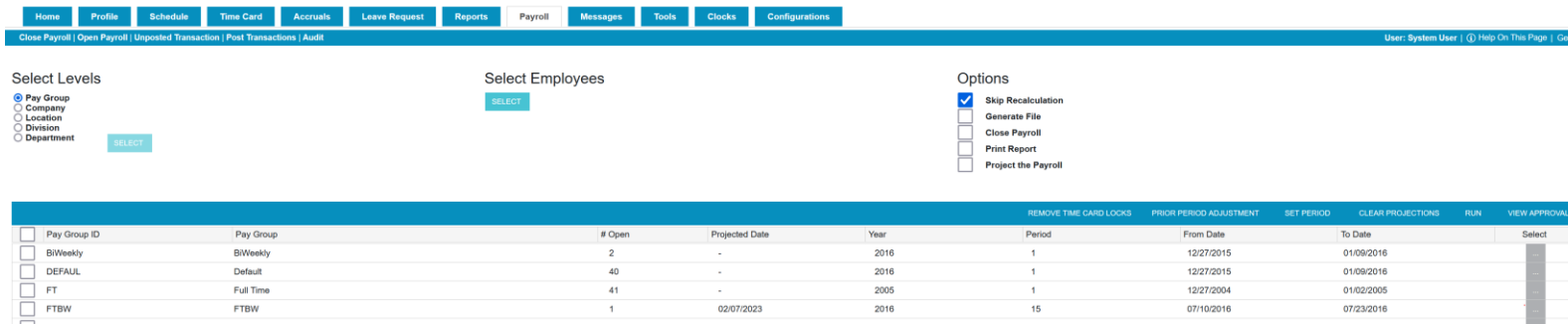
sandbox-demo-sales1.asureforce.net
The start date overlaps with previous end date.

sandbox-demo-sales1.asureforce.net
The start date leaves a gap after the previous end date.
OK

Payroll Tab Operations

How to generate a payroll file

■ Payroll Tab



Pay Group ID	Pay Group	# Open	Projected Date	Year	Period	From Date	To Date	Select
<input type="checkbox"/>	BiWeekly	2	-	2016	1	12/27/2015	01/09/2016	<input type="checkbox"/>
<input type="checkbox"/>	DEFAULT	40	-	2016	1	12/27/2015	01/09/2016	<input type="checkbox"/>
<input type="checkbox"/>	FT	41	-	2005	1	12/27/2004	01/02/2005	<input type="checkbox"/>
<input type="checkbox"/>	FTBW	1	02/07/2023	2016	15	07/10/2016	07/23/2016	<input type="checkbox"/>

Check the box to the left of the pay group(s) you want to generate the file for.

Make sure the From Date and To Date show the correct pay period you want to generate the file for

If you need to change this, click the set period button, pick any date within the period, click OK

Payroll Tab Operations

How to generate a payroll file

Select Date

Select a Date to indicate the Period and Year required

Select date:

- Generate File
- Close Payroll
- Print Report
- Project the Payroll

REMOVE TIME CARD LOCKS	PRIOR PERIOD ADJUSTMENT	SET PERIOD	CLEAR PROJECTIONS	RUN	VIEW APPROVALS
Year	Period	From Date	To Date	Select	
2019	1	01/01/2019	01/15/2019	⋮	
2021	16	07/26/2021	08/08/2021	⋮	
2017	1	01/01/2017	01/14/2017	⋮	
2019	1	01/01/2019	01/15/2019	⋮	
2021	1	01/02/2021	01/08/2021	⋮	
2021	32	08/01/2021	08/07/2021	⋮	
2005	1	12/27/2004	01/02/2005	⋮	
2020	1	12/30/2019	01/12/2020	⋮	
2021	14	04/03/2021	04/09/2021	⋮	
2021	1	01/02/2021	01/08/2021	⋮	

You can also change the pay period by clicking the gray three dots button in the Select column to the far right.

Select Period and Year

Select Period and Year to change the Pay Period

Pay Group Id: HOURLYFT

Year:

Period:

Start Date: 05/09/2021

End Date: 05/15/2021

Open: 0

Payroll Tab Operations

How to generate a payroll file

Options

<input checked="" type="checkbox"/> Skip Recalculation <input checked="" type="checkbox"/> Generate File <input type="checkbox"/> Close Payroll <input type="checkbox"/> Print Report <input type="checkbox"/> Project the Payroll	<input type="checkbox"/> Check for Pending Leave Requests <input type="checkbox"/> Check for missing Pay rates <input type="checkbox"/> Check for missing Punches <input type="checkbox"/> Check for Locks
--	---

REMOVE TIME CARD LOCKS	PRIOR PERIOD ADJUSTMENT	SET PERIOD	CLEAR PROJECTIONS	RUN	VIEW APPROVALS
Year	Period	From Date	To Date	Select	
2019	1	01/01/2019	01/15/2019		
2021	16	07/26/2021	08/08/2021		

Always leave Skip Recalculation checked. If you do need to recalculate time cards, follow the How to globally recalculate time cards article, then start from the beginning of this article.

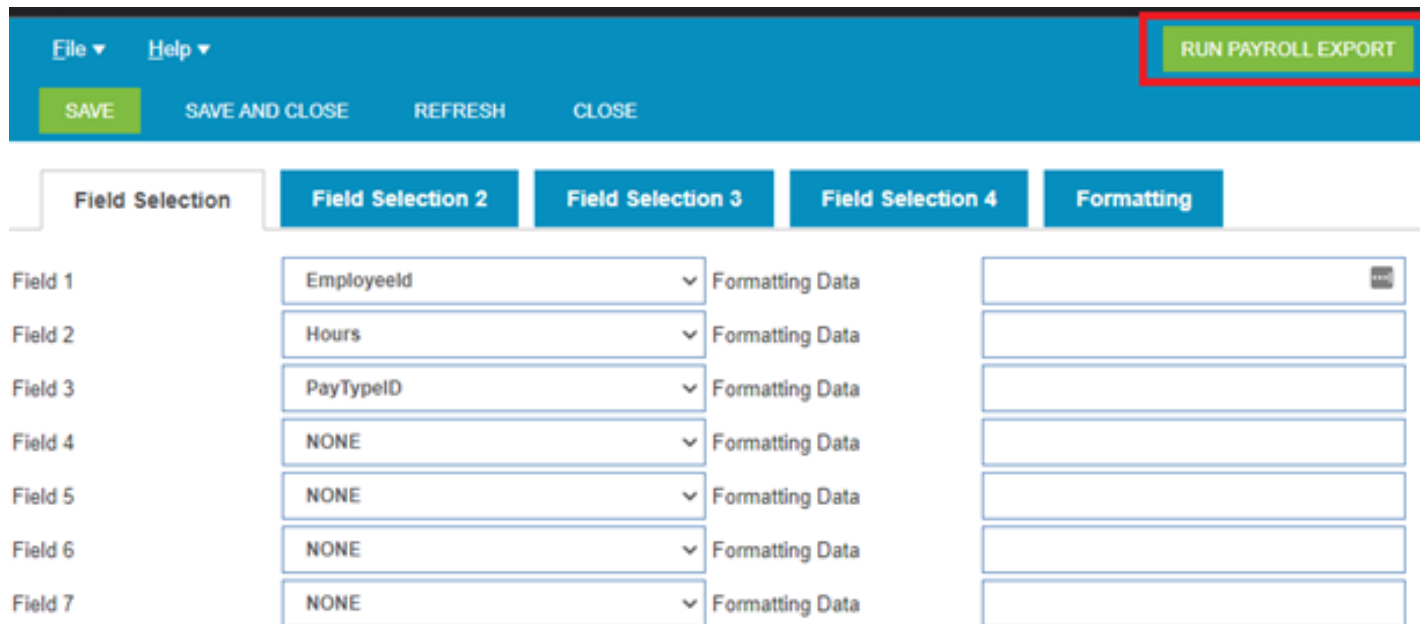
A global re-calc should always be done before running payroll.

Check Generate File

Click Run

Payroll Tab Operations

How to generate a payroll file



The screenshot shows a software interface for payroll operations. At the top, there is a blue header bar with a menu containing 'File' and 'Help'. Below the menu is a row of buttons: 'SAVE', 'SAVE AND CLOSE', 'REFRESH', and 'CLOSE'. A green button labeled 'RUN PAYROLL EXPORT' is highlighted with a red border. Below the header, there are five tabs: 'Field Selection', 'Field Selection 2', 'Field Selection 3', 'Field Selection 4', and 'Formatting'. The 'Field Selection' tab is active. It contains a table with seven rows, each representing a field. Each row has a dropdown menu for field selection and a 'Formatting Data' label. The first row is 'Employeeid', the second is 'Hours', the third is 'PayTypeID', and the remaining four are 'NONE'. To the right of the table, there are seven empty input boxes for formatting data.

Field	Field Selection	Formatting Data
Field 1	Employeeid	Formatting Data
Field 2	Hours	Formatting Data
Field 3	PayTypeID	Formatting Data
Field 4	NONE	Formatting Data
Field 5	NONE	Formatting Data
Field 6	NONE	Formatting Data
Field 7	NONE	Formatting Data

The payroll interface window will pop up.

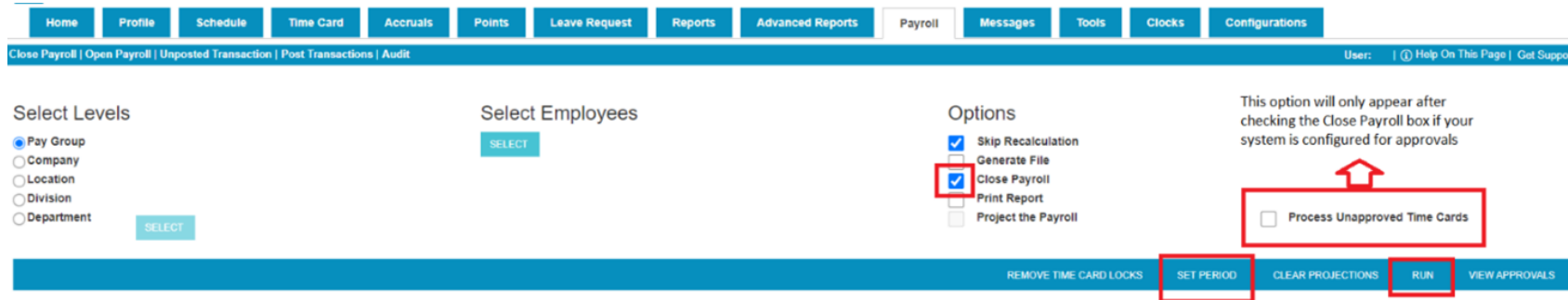
Click RUN PAYROLL EXPORT

Save the file.



Payroll Tab Operations

Close pay period.



Clicking the Payroll tab always defaults to the Close Payroll page

Click to place a check mark next to Close Payroll

Select the pay groups for which you want to close a pay period. To select all pay groups, click the check box in the header row.

To specify the pay period you want to close, click Set Period and in the pop-up calendar choose the pay period, and then click OK.

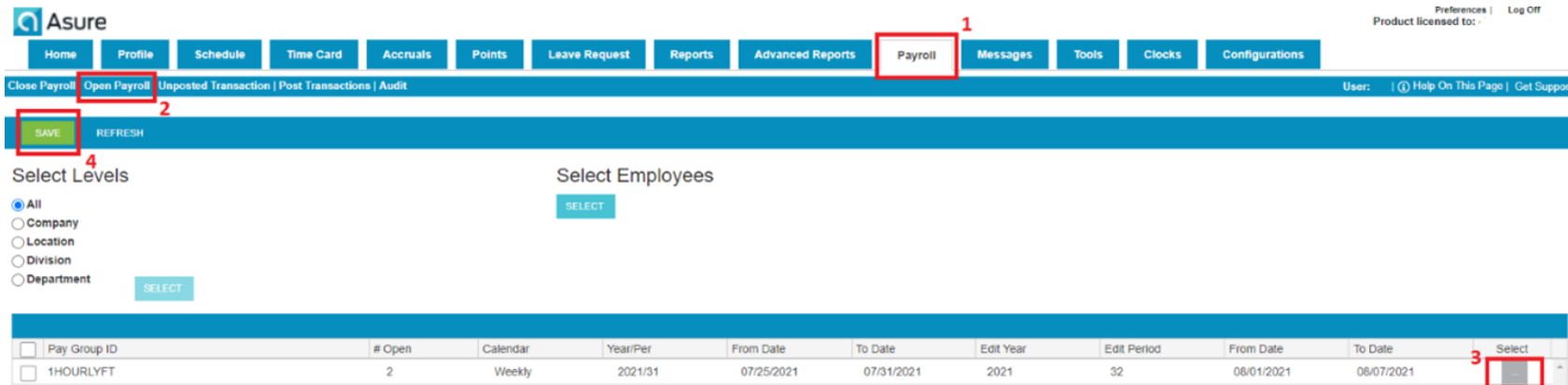
Click Run

Optional: Click Process Unapproved Time Cards if the system is configured for approvals and you want to ignore the approval status when closing payroll. By default, the payroll cannot be closed if the system is configured for approvals unless all time cards for the selected pay groups/hierarchies have been approved. Enabling this feature overrides the default and closes payroll with unapproved time cards.

If a time card is not approved, the data for that time card is still included in the payroll

Payroll Tab Operations

Closed payroll periods can be re-opened for editing



The screenshot shows the Asure payroll system interface. At the top, there is a navigation bar with tabs: Home, Profile, Schedule, Time Card, Accruals, Points, Leave Request, Reports, Advanced Reports, Payroll (highlighted with a red box and '1'), Messages, Tools, Clocks, and Configurations. Below this is a secondary bar with 'Close Payroll', 'Open Payroll' (highlighted with a red box and '2'), 'Unposted Transaction | Post Transactions | Audit', and a user profile section. A third bar contains 'SAVE' (highlighted with a red box and '4') and 'REFRESH' buttons. Below this are two selection sections: 'Select Levels' with radio buttons for 'All', 'Company', 'Location', 'Division', and 'Department' (each with a 'SELECT' button), and 'Select Employees' with a 'SELECT' button. At the bottom is a table with columns: Pay Group ID, # Open, Calendar, Year/Per, From Date, To Date, Edit Year, Edit Period, From Date, To Date, and Select (highlighted with a red box and '3'). The table contains one row for '1HOURLYFT' with values: 2, Weekly, 2021/31, 07/25/2021, 07/31/2021, 2021, 32, 08/01/2021, 08/07/2021.

Click the Payroll tab > Open Payroll

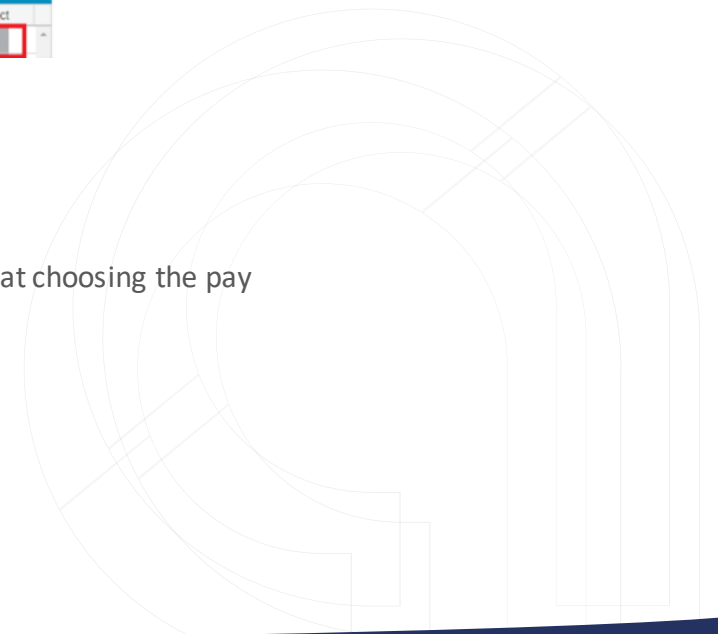
Check off the Pay Group(s) you would like to re-open by checking the box to the left of the pay group ID

- Optional: Select specific employee(s)

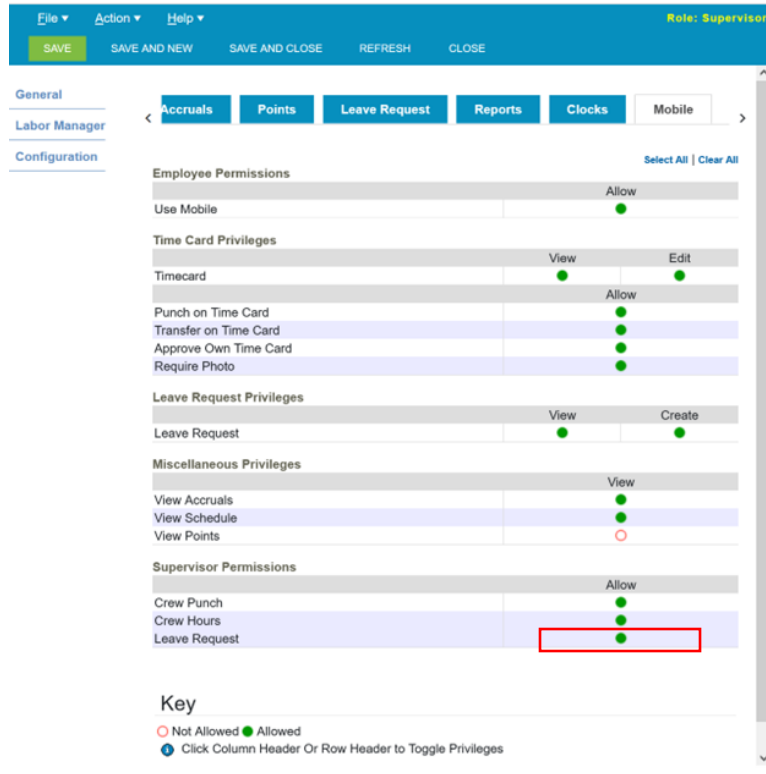
Click the three dots ... button in the Select column to choose the Year and Period you would like to re-open (far right). Repeat choosing the pay period for each pay group if you checked off more than one

Double check that the From Date and To Date show the pay period you want to re-open for all the pay groups chosen

Click Save



Supervisor Leave Request - Mobile



Role: Supervisor

SAVE SAVE AND NEW SAVE AND CLOSE REFRESH CLOSE

General Labor Manager Configuration

Accruals Points Leave Request Reports Clocks Mobile

Select All | Clear All

Category	Item	Permission
Employee Permissions	Use Mobile	Allowed (●)
Time Card Privileges	Timecard	View (●) Edit (●)
Leave Request Privileges	Punch on Time Card	Allowed (●)
	Transfer on Time Card	Allowed (●)
	Approve Own Time Card	Allowed (●)
	Require Photo	Allowed (●)
	Leave Request	View (●) Create (●)
Miscellaneous Privileges	View Accruals	Allowed (●)
	View Schedule	Allowed (●)
	View Points	Not Allowed (○)
Supervisor Permissions	Crew Punch	Allowed (●)
	Crew Hours	Allowed (●)
	Leave Request	Allowed (●)

Key

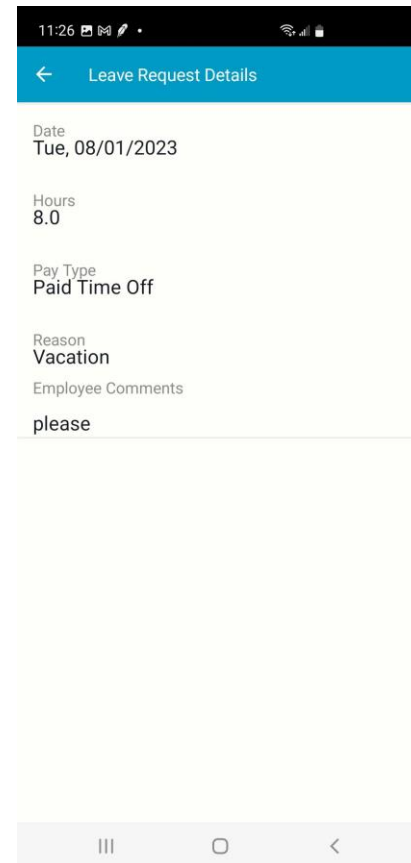
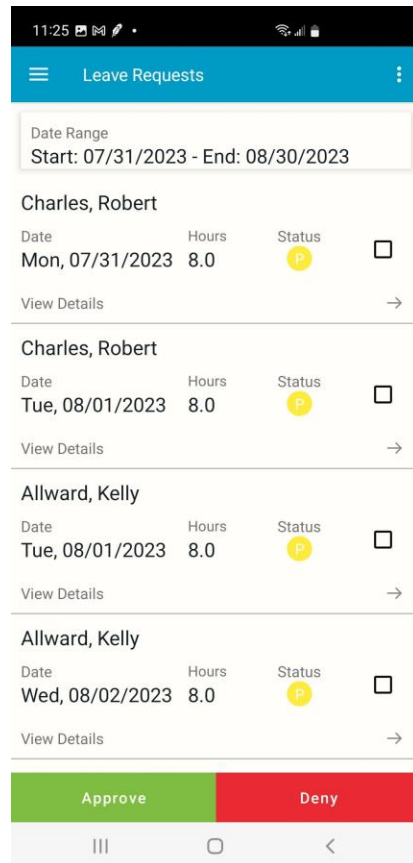
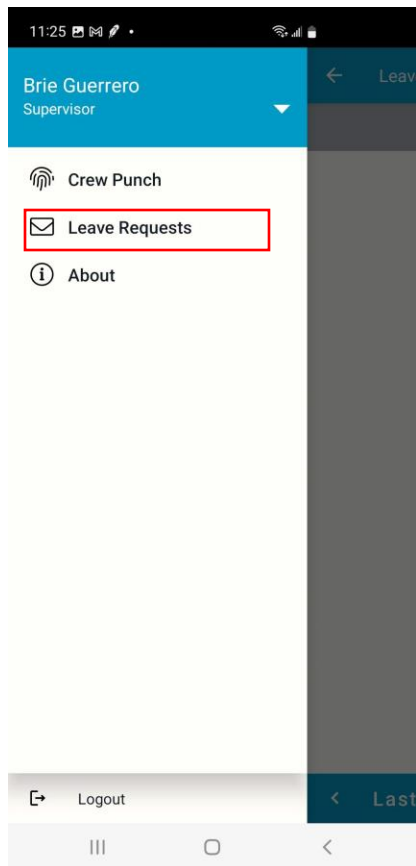
○ Not Allowed ● Allowed

👉 Click Column Header Or Row Header to Toggle Privileges

- Ensure that the Supervisor Security Role has Use Mobile enabled as well as Leave Request permissions under 'Supervisor Permissions'.

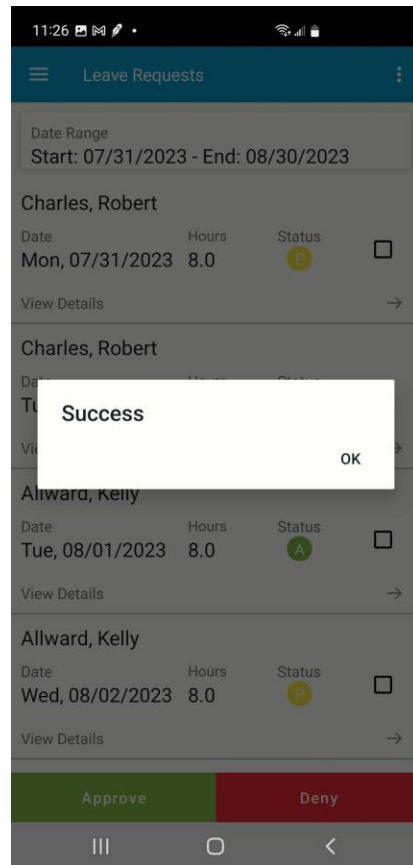
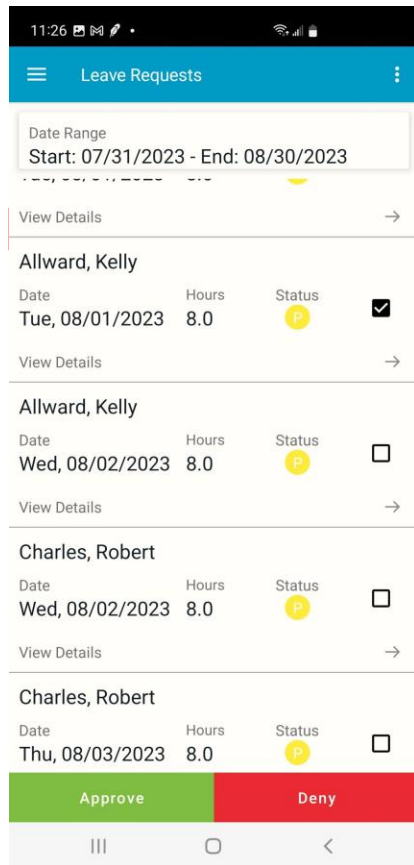


Supervisor Leave Request - Mobile



- When logged into Mobile as a supervisor with the Leave Request Permission enabled, the Supervisor Menu item is available.
- A list of Employee Leave Requests can be shown by List View or Week view
- Clicking on the arrow on the leave request will provide a Leave Request Details screen with additional information.

Supervisor Leave Request - Mobile



- Single or multiple requests can be selected
- After selecting Approve or Deny, a prompt is provided
- Upcoming features will allow Delete and Supervisor Comments



Password Reset

While logged in as a Supervisor or Administrator with the correct permissions

Profiles > Select Employee > Access Tab

General | Access | Personnel | Background

General

Employee Type

Employee
 Supervisor
 Manager
 System User

Login

Allow Web Login

Login ID

Password

Account Locked

FORCE PASSWORD RESET ON NEXT LOGIN

Employee Role

Role ...

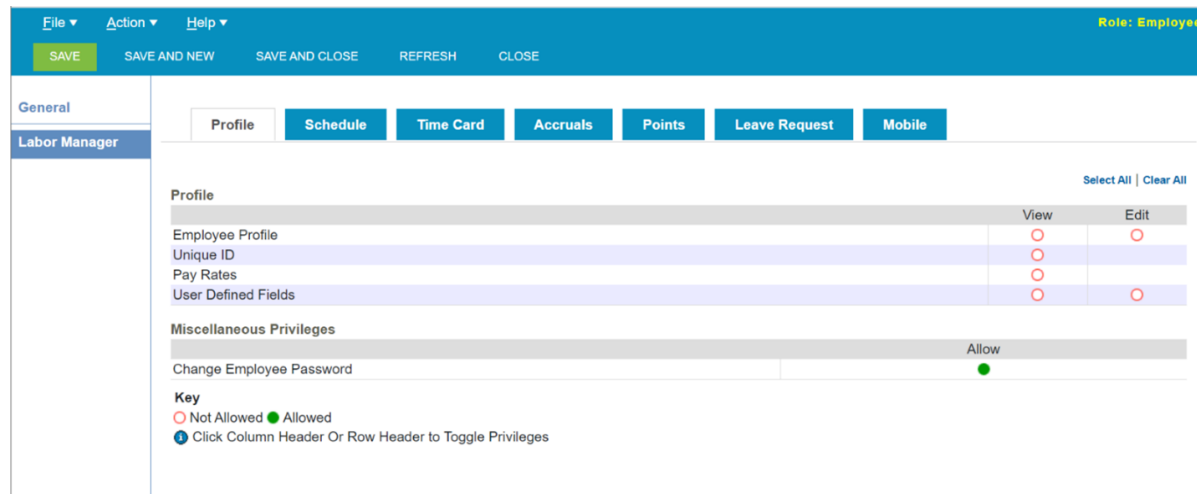
For the employee's password to be reset in T&A, Allow Web Login must be ticked.

Clicking into the Password box will clear out the field and allow a new password to be set. Be sure to Save prior to closing.

When viewing the Password field, it will always show six dots. This does not mean that there are six characters.

Password Reset

Changing password through Preferences



The screenshot shows a web application interface for an HR system. At the top, there is a navigation bar with 'File', 'Action', and 'Help' menus, and a 'Role: Employee' indicator. Below this is a toolbar with buttons for 'SAVE', 'SAVE AND NEW', 'SAVE AND CLOSE', 'REFRESH', and 'CLOSE'. The main content area is divided into a left sidebar with 'General' and 'Labor Manager' sections, and a main panel with tabs for 'Profile', 'Schedule', 'Time Card', 'Accruals', 'Points', 'Leave Request', and 'Mobile'. The 'Profile' tab is active, showing a table of privileges. The 'Change Employee Password' privilege is highlighted with a green dot, indicating it is allowed. A key at the bottom explains the symbols: a red circle for 'Not Allowed' and a green circle for 'Allowed'. A note also states 'Click Column Header Or Row Header to Toggle Privileges'.

Profile		View	Edit
Employee Profile		<input type="radio"/>	<input type="radio"/>
Unique ID		<input type="radio"/>	<input type="radio"/>
Pay Rates		<input type="radio"/>	<input type="radio"/>
User Defined Fields		<input type="radio"/>	<input type="radio"/>

Miscellaneous Privileges		Allow
Change Employee Password		<input checked="" type="radio"/>

Key
○ Not Allowed ● Allowed
👉 Click Column Header Or Row Header to Toggle Privileges

When the Change Employee Password option is set in Security Roles, a user is able to change their own password.



Password Reset

Changing password through Preferences

[Preferences](#) | [Log Off](#)
Product licensed to: **Asure Software**

User: Allward, Kelly | [Help On This Page](#)

[Change Password](#)

Click on Preferences in the upper right corner, next to the Log Off link.

Set User Preferences
Specify your preferences so that the program displays the way you prefer. Note that some of the

General | **Time Card**

Set the calendar week begin date

Use week begin date Yes No

Set the confirmation options

Confirm exit Yes No

Confirm save Yes No

Confirm save on exit/change Yes No

Change Password

Current Password

New Password

Confirm Password

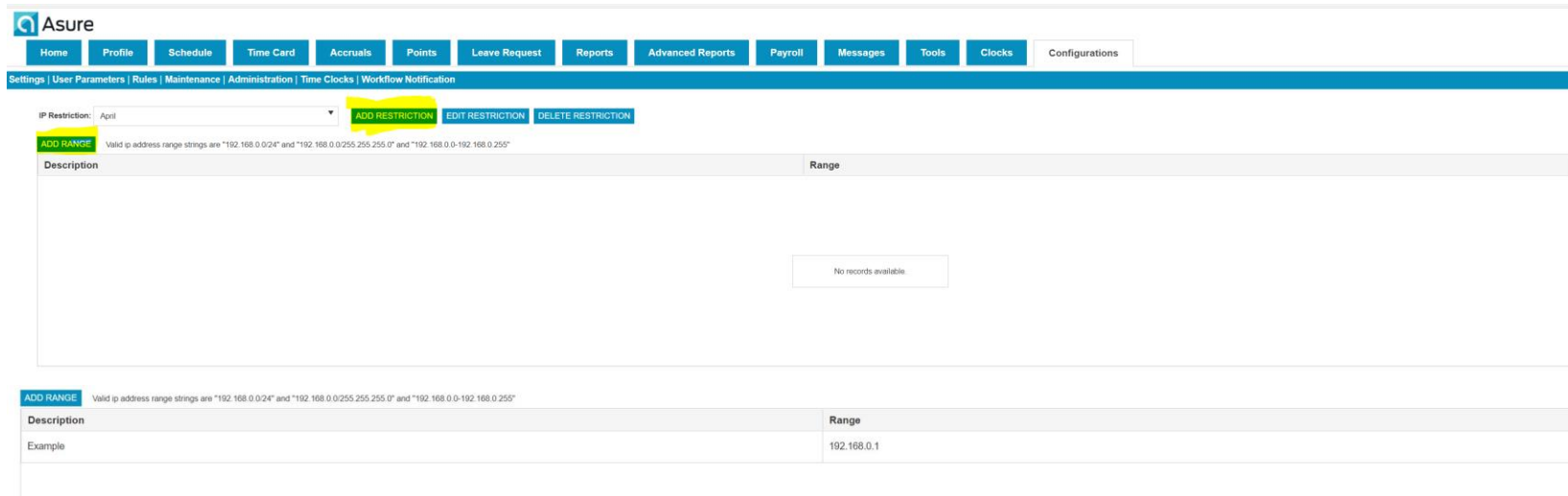
On the General tab of Preferences, there is an option to Change Password.

With this method, it is necessary that the user know their current password in order to set a new one.

IP Restrictions

IP restrictions can be setup and applied to Security Roles within Time & Attendance

Configurations > Administration > IP Restrictions



Asure

Home Profile Schedule Time Card Accruals Points Leave Request Reports Advanced Reports Payroll Messages Tools Clocks Configurations

Settings | User Parameters | Rules | Maintenance | Administration | Time Clocks | Workflow Notification

IP Restriction: April **ADD RESTRICTION** EDIT RESTRICTION DELETE RESTRICTION

ADD RANGE Valid ip address range strings are *192.168.0.0/24* and *192.168.0.0/255.255.255.0* and *192.168.0.0-192.168.0.255*

Description	Range
No records available.	

ADD RANGE Valid ip address range strings are *192.168.0.0/24* and *192.168.0.0/255.255.255.0* and *192.168.0.0-192.168.0.255*

Description	Range
Example	192.168.0.1

There can be multiple ranges per restriction.

Select Add Restriction and provide a descriptive name.

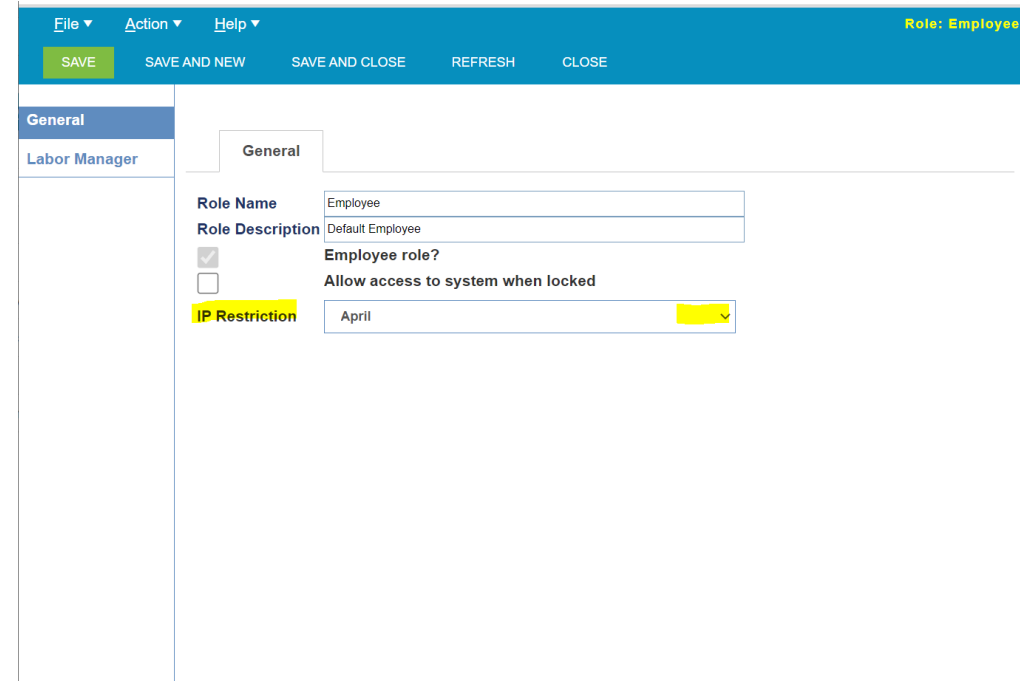
Select Add Range and provide a descriptive name and IP address or IP address range for the restriction.

IP Restrictions

Once a restriction is setup, it can be applied to a Security Role.

Configurations > Administration >
Security Roles

Once this is saved, the employees who have the Security Role of Employee will have the IP restriction Setup in April.

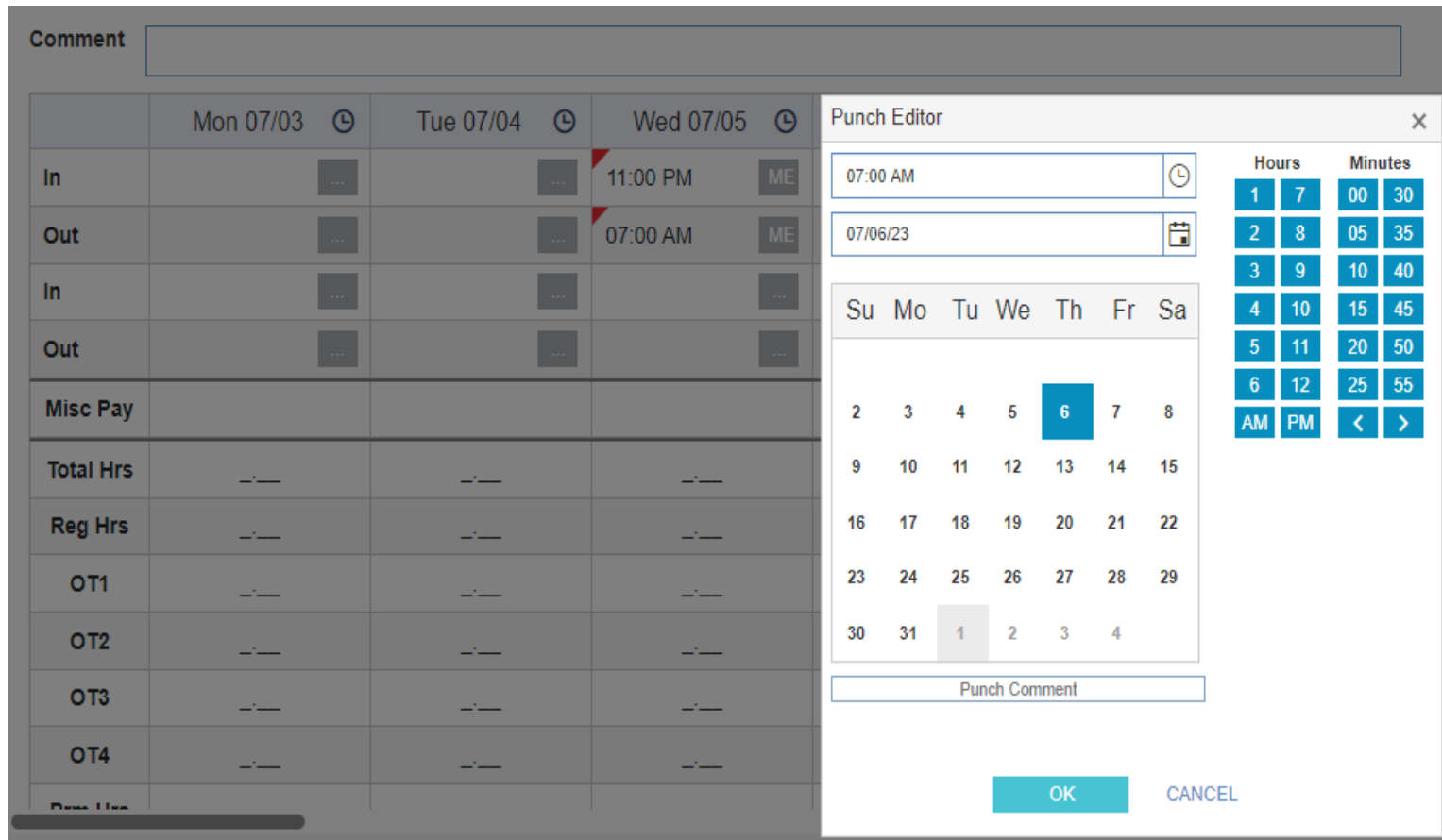


The screenshot shows a web application interface for configuring a security role. The top navigation bar includes 'File', 'Action', and 'Help' menus, and a 'Role: Employee' indicator. Below the navigation bar are buttons for 'SAVE', 'SAVE AND NEW', 'SAVE AND CLOSE', 'REFRESH', and 'CLOSE'. The main content area is divided into a left sidebar with 'General' and 'Labor Manager' tabs, and a right pane with a 'General' tab. The 'General' tab contains the following fields and options:

- Role Name:** Employee
- Role Description:** Default Employee
- Employee role?**
- Allow access to system when locked**
- IP Restriction:** April

Insert punch when crossing days

For example, an employee's work period is 11:00 pm Wednesday to 7:00 am Thursday.



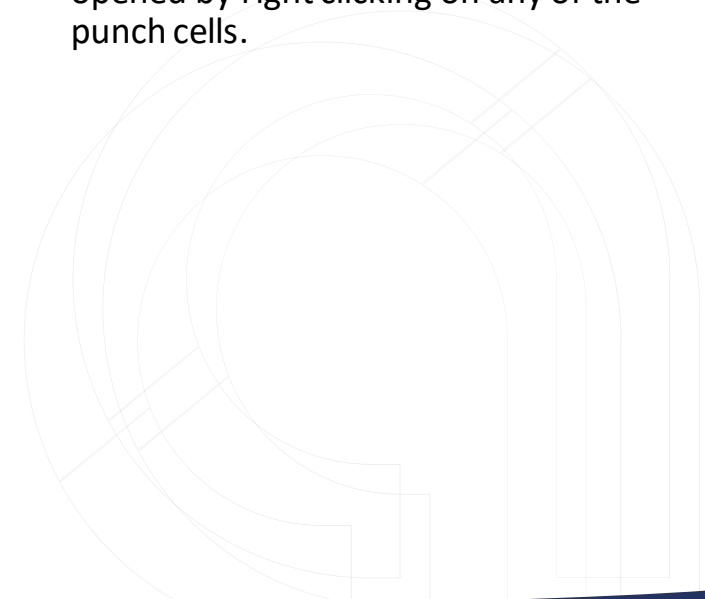
The screenshot shows a time management interface with a punch card and a 'Punch Editor' window. The punch card has columns for Mon 07/03, Tue 07/04, and Wed 07/05. The 'Punch Editor' window is open, showing a date of 07/06/23 and a time of 07:00 AM. A calendar pop-up is visible, showing the date 07/06/23 selected. The punch card shows an 'In' punch at 11:00 PM on Wednesday and an 'Out' punch at 07:00 AM on Thursday. The 'Punch Editor' window has a 'Punch Comment' field and 'OK' and 'CANCEL' buttons.

	Mon 07/03	Tue 07/04	Wed 07/05
In			11:00 PM ME
Out			07:00 AM ME
In			
Out			
Misc Pay			
Total Hrs	---	---	---
Reg Hrs	---	---	---
OT1	---	---	---
OT2	---	---	---
OT3	---	---	---
OT4	---	---	---

Enter the In and Out punches on Wednesday.

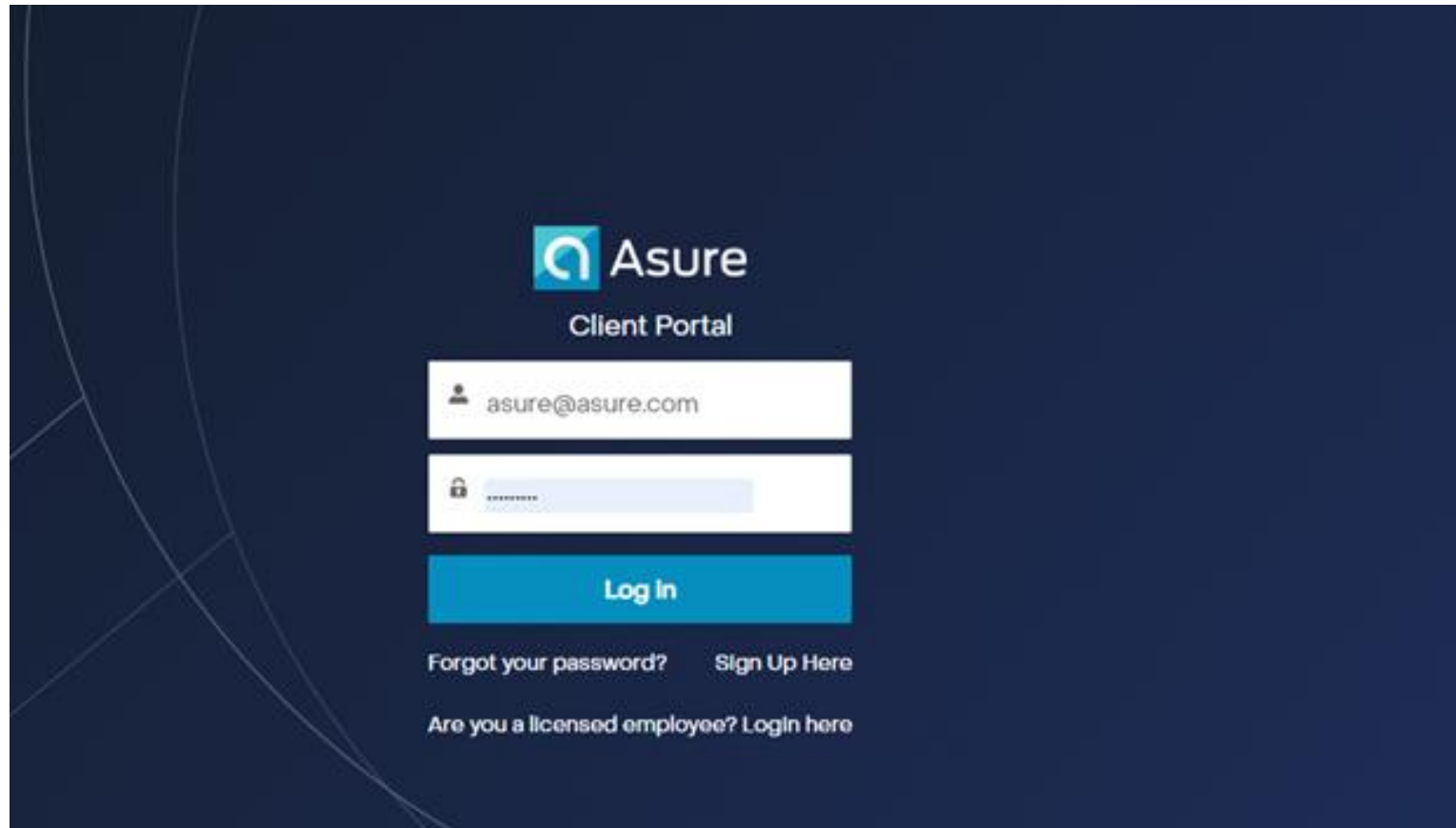
Double-click the Out punch and change the punch date to Thursday's date on the calendar pop-up.

Note: the Punch Editor window can be opened by right clicking on any of the punch cells.



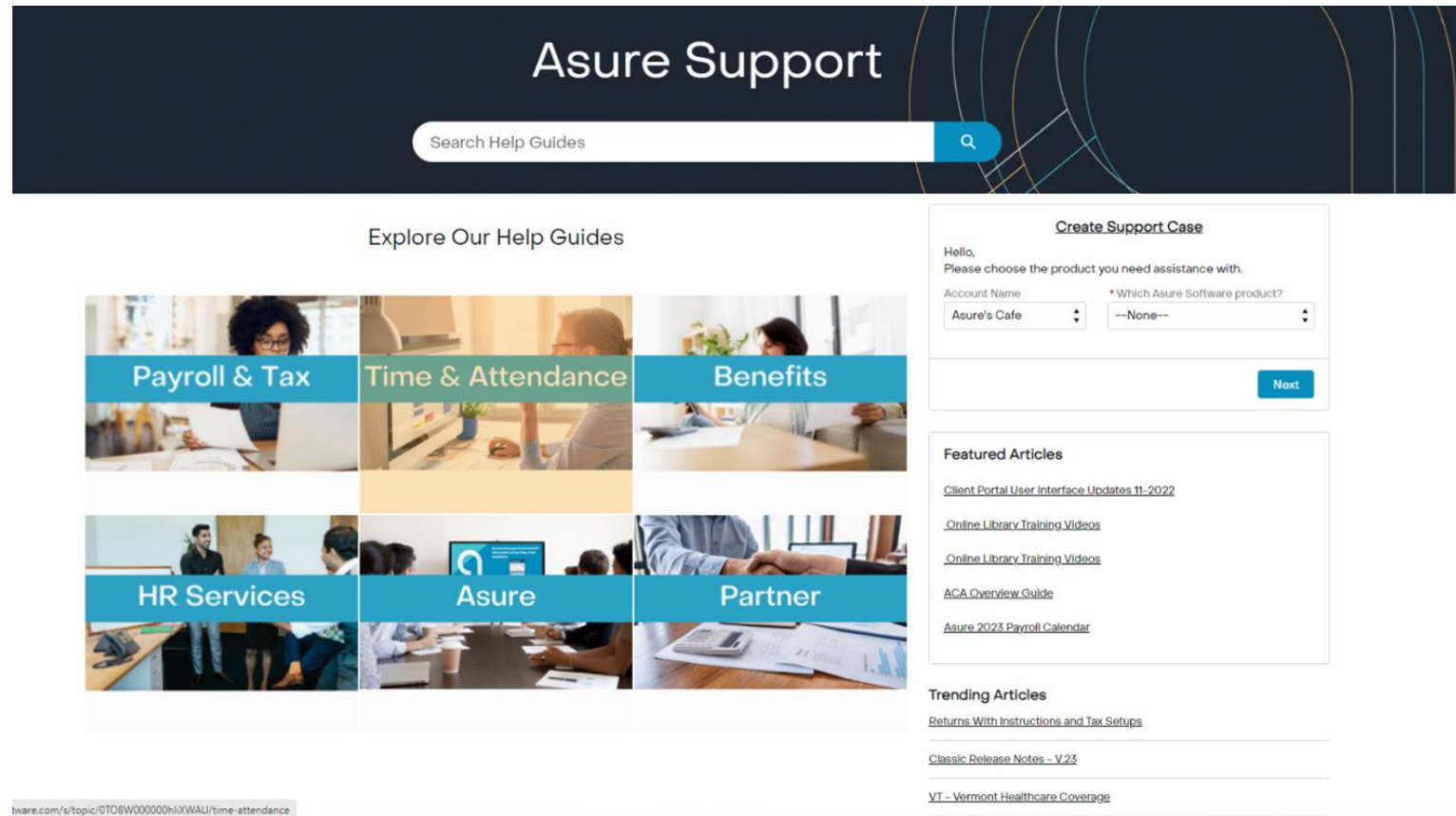
Access the Support Portal

Support Portal URL: <https://Support.Asuresoftware.com>



Access the Support Portal

Support Portal URL: <https://Support.Asuresoftware.com>



The screenshot displays the Asure Support portal interface. At the top, a dark blue header contains the text "Asure Support" and a search bar labeled "Search Help Guides". Below the header, the main content area is divided into several sections:

- Explore Our Help Guides:** A grid of six categories, each with a representative image and a blue label: "Payroll & Tax", "Time & Attendance", "Benefits", "HR Services", "Asure", and "Partner".
- Create Support Case:** A form titled "Create Support Case" with the following fields:
 - Greeting: "Hello, Please choose the product you need assistance with."
 - Account Name: A dropdown menu with "Asure's Cafe" selected.
 - Which Asure Software product?: A dropdown menu with "--None--" selected.
 - A "Next" button is located at the bottom right of the form.
- Featured Articles:** A list of four article links:
 - [Client Portal User Interface Updates 11-2022](#)
 - [Online Library Training Videos](#)
 - [Online Library Training Videos](#)
 - [ACA Overview Guide](#)
 - [Asure 2023 Payroll Calendar](#)
- Trending Articles:** A list of three article links:
 - [Returns With Instructions and Tax Setups](#)
 - [Classic Release Notes - V23](#)
 - [VT - Vermont Healthcare Coverage](#)

At the bottom left of the screenshot, a small URL is visible: www.asure.com/s/topic/0TO8W000000hiXWAL/time-attendance



Access the Support Portal

Support Portal URL: <https://Support.Asuresoftware.com>

Release Notes (TLM) | Software Documentation And How To | Troubleshooting | Hardware | Integration

Asure TLM Release Notes v12 (Current)

Link to PDF of current TLM Release Notes - Version 12

21 Views · Apr 22, 2023 · Knowledge

166
Articles

How to Import Profile UDF Fields

This article will walk you through importing UDF fields into an Employees Profile.

6 Views · Apr 10, 2023 · Knowledge

Mobile Release Notes

Android and iOS Release Notes - (Current)

19 Views · Apr 7, 2023 · Knowledge

Asure Time & Attendance Mobile Quick Guide

23 Views · Apr 6, 2023 · Knowledge

How to turn on workflow notifications

This article will provide steps to turn on workflow notifications.

0 Views · Apr 4, 2023 · Knowledge

How to Create Workflow Notifications

This article will explain how to create WFN for supervisors and employees.

4 Views · Apr 4, 2023 · Knowledge

Trending Articles

[How to create a Master Schedule](#)

[Reports Basics](#)

[Employee Hours Entry Quick Reference Guide](#)

[How to Create Workflow Notifications](#)

[Asure TLM Release Notes v12 \(Current\)](#)

Related Topics

[Software Documentation And How To](#)

[Hardware](#)

[400 Clock](#)

[Troubleshooting](#)

[Release Notes \(TLM\)](#)



Q & A

Time & Attendance moving forward

T&A Asure Identity Management

Consolidate Reporting Tools



Kiosk Time Clock & AsureIRIS

Separate Punch Buttons

T&A Employee Portal

Resources & Contact Us



(401) 885-4401



Robert.Gryta@asuresoftware.com



Support Portal URL:

<https://Support.Asuresoftware.com>





Thank You!



2023 Asure Reseller Partner Conference

