

# Clarity - TnA Installation And Setup Guide

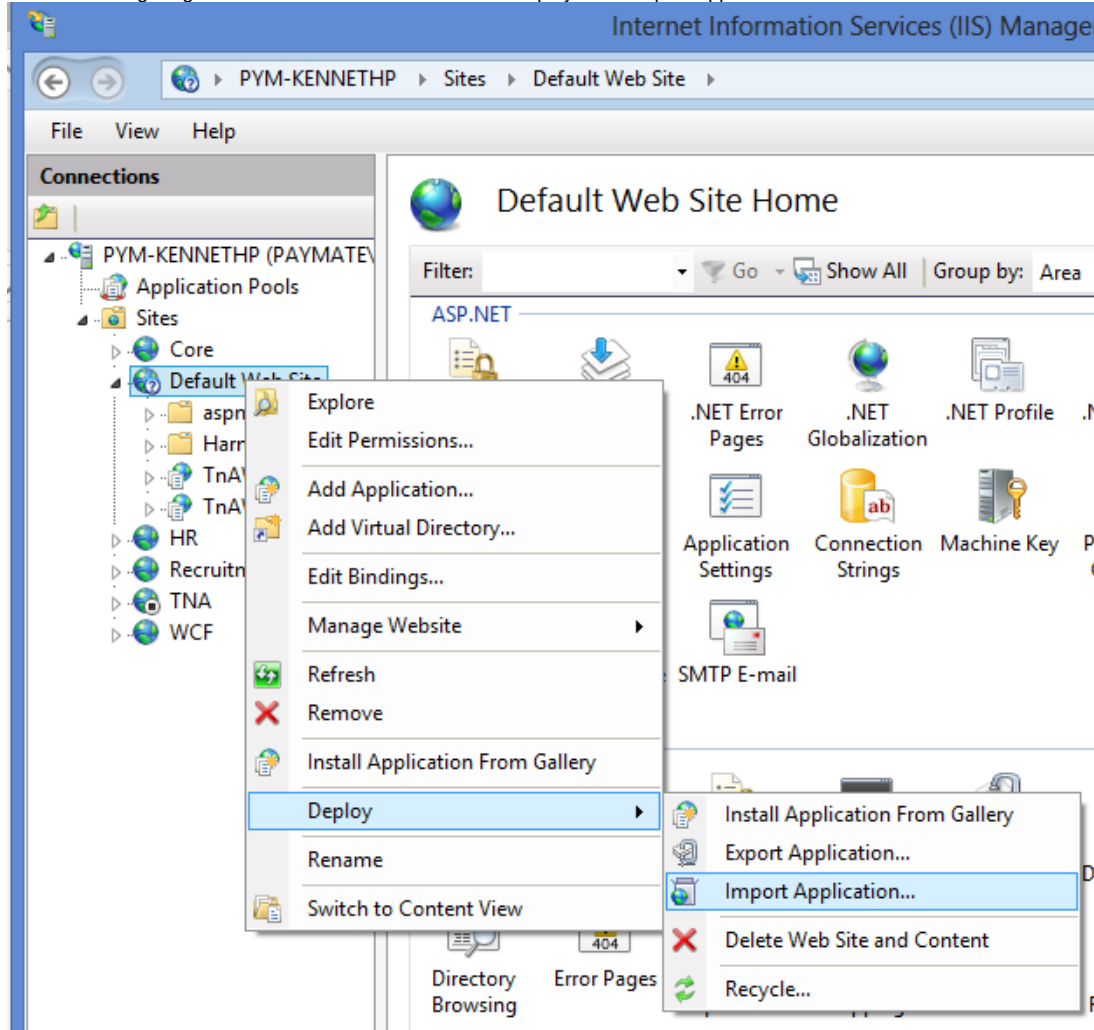
## Requirements for target machine

1. Internet Information Server version 7 or higher (can not work on XP home) **IIS must be installed first!**. (if not, see the solution here: <http://support.microsoft.com/default.aspx?scid=kb;EN-US;325093> )
2. Microsoft .NET Framework version 4.5.1 (available at <http://www.microsoft.com/en-ca/download/details.aspx?id=40779> )
3. Microsoft deployment package (available at <http://www.iis.net/downloads/microsoft/web-deploy>)
4. Microsoft SQL Server version 2008 or higher with Clarity database (accessible through network)
5. Internet Explorer version 10 or higher with Javascript enabled
6. Clarity program (to configure TnA functionality) with TnA license

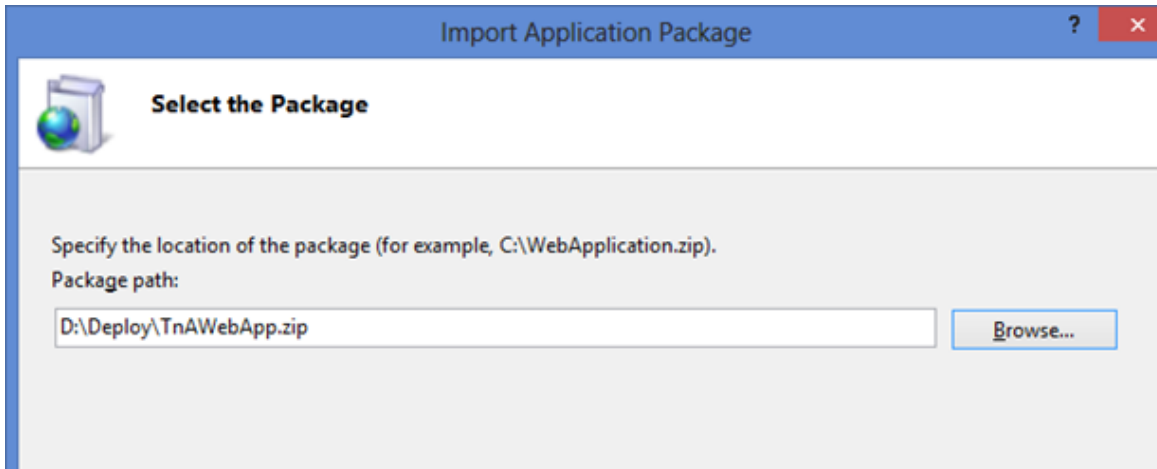
## Installation

1. Download the package files and copy it to a local folder. The package file is a zip file and it does not require to be extracted.
2. Click Control Panel -> administration tools -> Internet information Services (IIS) manager

In the iis manager right click the "default website" select "Deploy" and "Import Application."



1. On next screen select the package zip file from step 1.



**Import Application Package**

**Select the Package**

Specify the location of the package (for example, C:\WebApplication.zip).

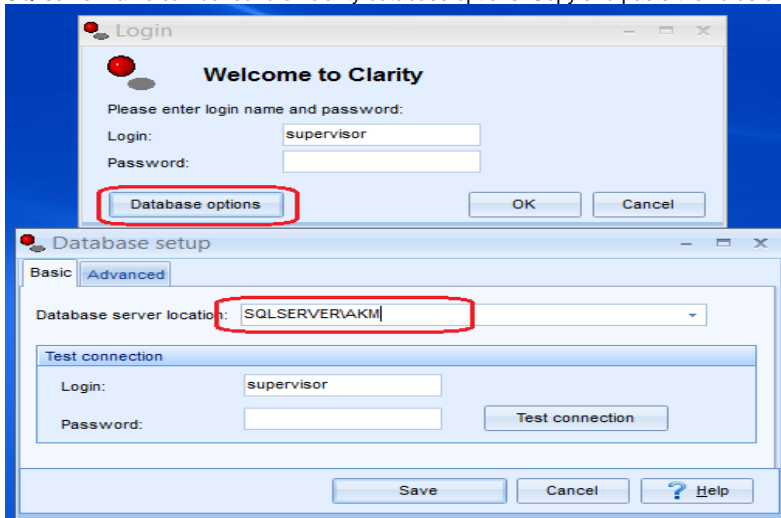
Package path:

D:\Deploy\TnAWebApp.zip

Browse...

1. Click next until the "Application Package Information" form appears.
2. First enter the application path. This parameter will be used in the url to open the webpage. For example when "Application Path" is set to "TnAWebApp" and the iis server is: "mycompany.com" , then the url to open the application would be:"mycompany.com/tnawebapp"
3. On Sql server field enter SQL Server name and instance. For example: "sqlserver\akm"

SQL server name can be found on clarity database options. Copy and paste the value of "Database server location"



**Login**

**Welcome to Clarity**

Please enter login name and password:

Login: supervisor

Password:

Database options OK Cancel

**Database setup**

Basic Advanced

Database server location: SQLSERVER\AKM

Test connection

Login: supervisor

Password:

Test connection

Save Cancel Help

1. Enter the sql server sa password. This is required only if the password has been changed from the paymate default password.

If the password is still blank then leave the password fields blank and proceed to next parameter.

1. Mail server is the smtp mail server which is used to send the emails from. This could be obtained from the email provider.
2. Enter the email address which the notification emails will be sent from as well

Import Application Package

**Enter Application Package Information**

Enter information that is required to install this package:

**Application Path**  
Full site path where you want to install your application (for example, Default Web Site/Application).  
Default Web Site/

**Sql Server**  
Please the Sql Server followed by instance name(eg. sqlserver\akm):

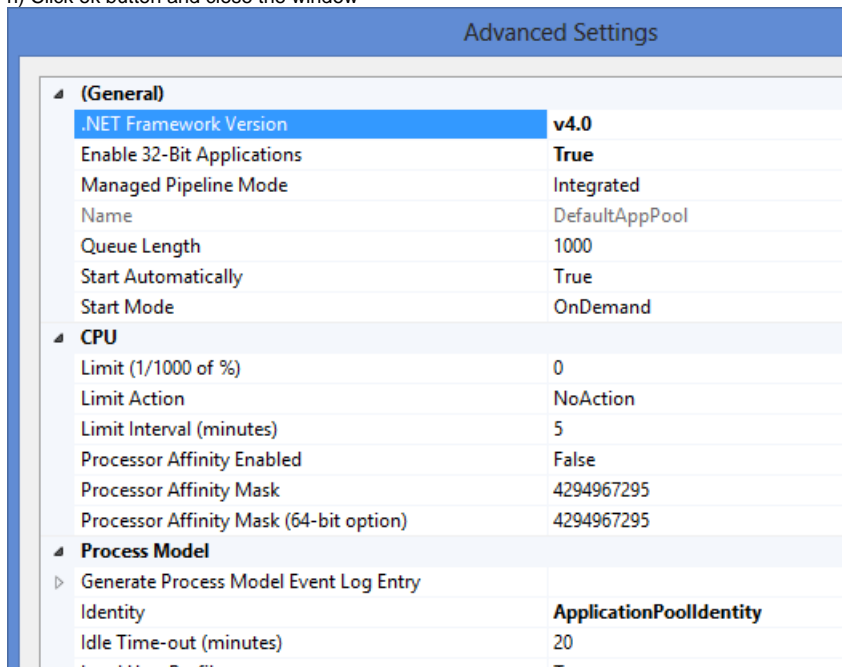
**Database Password**  
Password for the sa username. Please leave the password BLANK to use the default Paymate password.  
Password:  Confirm password:

**Mail Server (SMTP)**  
Please provide the smtp mail server address:

**Send email address**  
Please the email address which email will be sent from:

1. Click next and finish on next screen to finalize the installation
2. a) Open the IIS manager

- Expand the server on left panel
- Click on "Application Pools"
- Right click on "Default application Pool" in the middle panel
- Click on "Advanced Settings" menu
- Set the ".NET Framework Version" to v4.0
- Set the "Enable 32-Bit Applications" to True. (Windows 64 bit operating systems only)
- Click ok button and close the window



#### Application setup via web.config file

```
</system.web>
<appSettings>
  <!-- User application and configured property settings go here.-->
  <!-- Example: <add key="settingName" value="settingValue"/> -->
  <add key="SqlConnection" value="user id=sa;data source=KATA2\AKM initial catalog=TEST_TNA.CPY password= " />
  <add key="Mail.SmtpServer" value="master" />
  <add key="Mail.From" value="artin@artin.cz" />
  <add key="Mail.ErrorMailTo" value="jminx@artin.cz" />
  <add key="RemindFirstTime" value="22/09/2003 00:10" />
  <add key="RemindPeriod" value="1.00:00:00" />
  <add key="GenerationTime" value="00:10" />
</appSettings>
</configuration>
```

**Please note, this configuration is not necessary if the installation was successful.**

Edit configuration file: `c:\inetpub\wwwroot\tna\web.config`. Application settings can be found in *appSettings* section.

- SqlConnection* - valid connection string (e.g. data source=localhost; initial catalog=Clarity\_CPY; user id=clarity; password=clarity).
- Mail.SmtpServer* - SMTP server for automatic sending mail from application
- Mail.From* - sender's email address (automatic mails)
- Mail.ErrorMailTo* - email address to who we want to send the error messages (e.g. artin@artin.cz)
- RemindFirstTime* - date and time when first reminders will be sent (e.g. 01/01/2004 00:10)
- RemindPeriod* - repeat period for reminders (e.g. 1.00:00:00 - 1 day)
- GenerationTime* - time of day when time entries will be generated (e.g. 08:00)

## Configure Clarity functionality for web TnA application

Set TnA defaults in the preferences in the TnA tab. ({}\*)Setup Preferences)

#### \*Approval path options:

EnteredApprovedPaid: Employees and/or managers can enter Time information, managers are required to approve any records before payroll may process it for payment.

EnteredPaid: All time entered is considered immediately approved and available to payroll for processing.

EnteredSubmittedApprovedPaid: Employees may enter time records that are hidden from the manager until the employee SUBMITS the record for approval. Managers may create, edit, delete, approve or reject any record that has been submitted. ONLY after approval is the record is available for processing by payroll.

#### Rounding Time Rules:

The system can be configured to round the start time (IN) and end times (OUT) of all time entries for the employees. The time is listed to show hours or minutes, so to round to the quarter (1/4) of an hour you would enter 00:15, half (1/2) hour would be 00:30 and hour would be 01:00.

You can choose to round to the nearest value, previous value or next (round value), here is a few example of how the rules apply:

TIME RULERULEStart ValueNew Value

1. 00:15 NEXT08:04 am08:15 am
2. 00:15PREVIOUS08:04 am08:00 am
3. 00:15NEAR08:04 am08:00 am
4. 00:15NEAR08:09 am08:15 am
5. 00:15PREVIOUS08:09 am08:00 am
6. 00:15NEXT08:09 am08:15 am

- Set compensation summary in the employee master paycard ({}\*)Employees Master paycard({})
  - The category assigned here is the category to which the employees regular hourly wages are going to be reported. This category must be flagged "Used for attendance" in the category setup.

**Employee master paycard**

Number: 007 Name: Smith, Harold

List Earnings Benefits Taxes Deductions Accruals Balance Payroll taxes **Compensation summary** Job setup

Basic information

Base wage category: 109

Daily hours: 8.00 Weekly hours: 40.00

Hourly rate: 28.41

Working hours per period: 176.00

Pay frequency: 12

Annual salary: 60000.00

FTE amount:

Compa ratio:

Close ? Help

- Create managers ({}Setup Managers{})

**Managers**

Numb	Surname	First name	Status	Paygroup	Department
003	Holmes	Jennifer	Active	Hourly	General
005	Douglas	Jack	Active	Hourly	General
006	Peterson	Guinevere	Active	Hourly	General
007	Smith	Harold	Active	Management	Secondary
011	23		Active	Management	General

Close ? Help

- Assign manager to the employees ((\*Employees General information Organization tab{\*\*}))

- Work schedule MAY(optional) be defined. ((\*Setup Attendance settings Work schedules{\*\*}))

Employees with assigned work schedules will automatically have their records, upon creation, be set to the time span for the current day.  
 IE: If an employee create new record and it is Tuesday, their Time record will default to 08:00 to 16:00. The record can be modified to reflect the accurate start/end times for the employee.

When a lunch break is added for a day the time record will automatically be split into two records after it was saved if the original recorded spanned over the lunch break.

Example:

John enters a timesheet record from 08:00 and ending at 16:00.

After clicking on save the program breaks the record in two and actually creates

1 record for 08:00 – 13:00

1 record for 13:30 – 16:00

The lunch break automatically being applied.  
Breaks 1 and 2 do not apply this function, only the "lunch" break option.

Work schedules

Work schedules

Code: 1

Name: WorkSchedule

List

Details

Schedule

Day	Start time <small>△</small>	End time <small>△</small>	Job centre	Cost centre	Lunch	Lunch start	Lunch end
Monday	08:00 AM	04:00 PM	001	INTTPHCATAE	<input type="checkbox"/>		
Tuesday	08:00 AM	04:00 PM	001	INTTPHCATAE	<input type="checkbox"/>		
Wednesday	08:00 AM	04:00 PM	001	INTTPHCATAE	<input type="checkbox"/>		
Thursday	08:00 AM	04:00 PM	001	INTTPHCATAE	<input type="checkbox"/>		
Friday	08:00 AM	04:00 PM	001	INTTPHCATAE	<input type="checkbox"/>		

Add record

Delete record

Close

Help

- Overtime rule may(optional) be defined ((\*Setup Attendance settings Overtime rules)

Overtime rules

Overtime rules

List

Detail

Code: Standard

Name: Standard

Please define the overtime rule in below.

<small>△</small>	For	Day	When the rule will be applied	hh:mm	to be paid by	Overtime category
1	For	Weekday	After completed compensation daily hour	23:59	to be paid by	Overtime 1
2	For	Saturday	After completed compensation daily hour	23:59	to be paid by	Overtime 1
3	For	Sunday	After completed compensation daily hour	23:59	to be paid by	Overtime 1
4	For	Weekday	After completed compensation weekly ho	23:59	to be paid by	Overtime 1
5	For	Weekday	After completed compensation weekly ho	23:59	to be paid by	Overtime 1
6	For	Weekday	After completed compensation weekly ho	23:59	to be paid by	Overtime 1

Add record

Delete record

Close

Help

**\*Overtime rule types**

- First hour Worked: All the hours for the selected day are assigned to the overtime category
- After daily hours: Once the employee has worked the number of hours in a day assigned to his/her compensation summary the rest will be assigned to this overtime category.



- After weekly hours: Once the employee has worked the number of hours in a week assigned to his/her compensation summary the rest will be assigned to this overtime category.
- After Scheduled hours: If the employee works hours they are not schedule for (schedule required for this to work) the hours will be assigned to overtime.

Daily and weekly overtime rules can both be applied to the same day policy. However, only REGULAR (IE: Non-overtime hours) are used in the calculation of overtime for either rule.

- TnA group must be defined ({\*}Setup Attendance settings TnA groups{\*})

**TnA groups**

Code: TnA

Name: TnA

Timesheet period type: Bi-weekly

Timesheet period start date: 06/02/2014

Default start time: 08:00:00

Work schedule:

Work schedule: [dropdown]

Auto generate time entries: No

Overtime settings

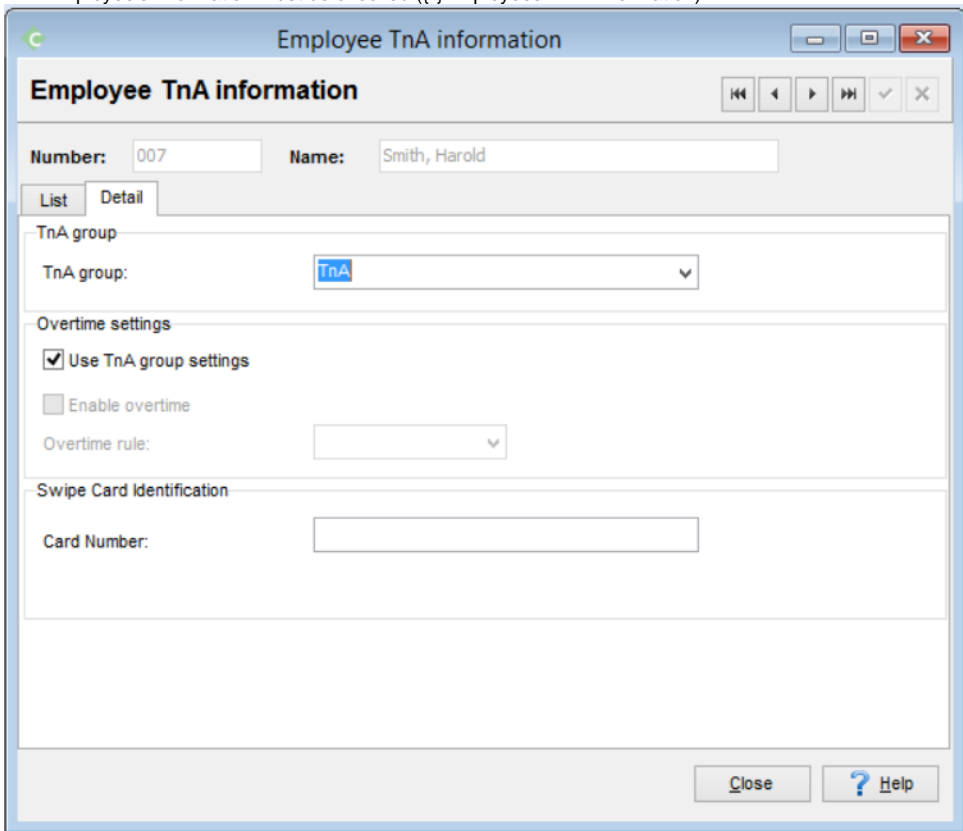
☒ Enable overtime

Overtime rule: Standard

Close Help

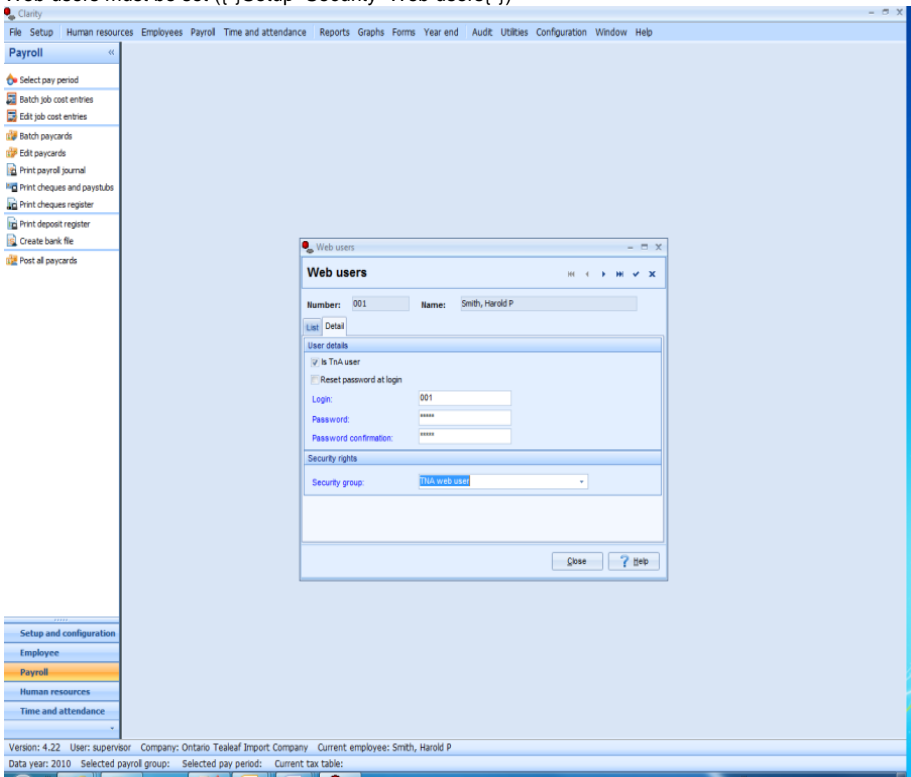
- The Timesheet period start date controls the date in which the timesheets are displayed but also is the start DAY (Monday, Tuesday, etc) used for calculating Weekly overtime.

- TnA Employee's information must be checked ({{\*}}Employees TnA information)\*



The 'Employee TnA information' window is a standard Windows-style application window with a title bar. It features a header section with the title 'Employee TnA information' and navigation buttons. Below the header, there are input fields for 'Number' (containing '007') and 'Name' (containing 'Smith, Harold'). A tabbed interface shows 'List' and 'Detail' tabs, with 'Detail' currently selected. The main content area is divided into three sections: 'TnA group' with a dropdown menu showing 'TnA'; 'Overtime settings' with a checked 'Use TnA group settings' checkbox, an unchecked 'Enable overtime' checkbox, and an 'Overtime rule' dropdown; and 'Swipe Card Identification' with a 'Card Number' input field. At the bottom right, there are 'Close' and 'Help' buttons.

- Web users must be set ({{\*}}Setup Security Web users{{\*}})



The screenshot shows the 'Clarity' payroll system interface. On the left is a sidebar with a 'Payroll' menu and a 'Setup and configuration' section. The 'Payroll' menu includes options like 'Select pay period', 'Batch job cost entries', 'Batch paycards', etc. The 'Setup and configuration' section includes 'Employee', 'Payroll', 'Human resources', and 'Time and attendance'. The 'Payroll' option is currently selected. The main window displays the 'Web users' dialog box, which is titled 'Web users' and has a 'Detail' tab selected. It contains fields for 'Numbers' (001) and 'Name' (Smith, Harold P). The 'User details' section has a checked 'Is TnA user' checkbox and a 'Reset password at login' checkbox. Below these are fields for 'Login' (001), 'Password', and 'Password confirmation'. The 'Security rights' section has a 'Security group' dropdown menu set to 'TnA web user'. At the bottom of the dialog are 'Close' and 'Help' buttons. The status bar at the bottom of the Clarity window shows 'Version: 4.22', 'User: supervisor', 'Company: Ontario Tealeaf Import Company', 'Current employee: Smith, Harold P', 'Data year: 2010', 'Selected payroll group:', 'Selected pay period:', and 'Current tax table:'.

- Payroll categories for the expense types must be created ({\*}Setup Payroll settings Payroll categories{\*)}

**Payroll category**

Category: Earning Number: 1090 Name: Travel

Basic information

Number: 1090  
Name: Travel  
Abbreviation: TRV  
Type: Regular

Flags

- ☒ Show on paystub
- ☒ Default to new employee
- ☐ Tax as bonus
- ☒ Used for job costing
- ☐ Used for payroll quick entry
- ☐ Used for attendance

Subject to:

Category	Number	Name
<input checked="" type="checkbox"/> Tax	300	Federal income tax
<input checked="" type="checkbox"/> Tax	302	Employment insurance
<input checked="" type="checkbox"/> Tax	303	Canada pension plan
<input checked="" type="checkbox"/> Tax	304	Quebec pension plan
<input checked="" type="checkbox"/> Tax	305	Quebec income tax
<input checked="" type="checkbox"/> Tax	307	Ontario income tax
<input checked="" type="checkbox"/> Tax	309	Employee premium (GPP)
<input checked="" type="checkbox"/> Payroll tax	703	Employer premium (GPP-ER)
<input checked="" type="checkbox"/> Accrual	500	Vacation pay
<input checked="" type="checkbox"/> Accrual	501	Sick pay

Select all Unselect all

Version: 4.22 User: supervisor Company: Ontario Tealeaf Import Company Current employee: Smith, Harold P  
Data year: 2010 Selected payroll group: Selected pay period: Current tax table:

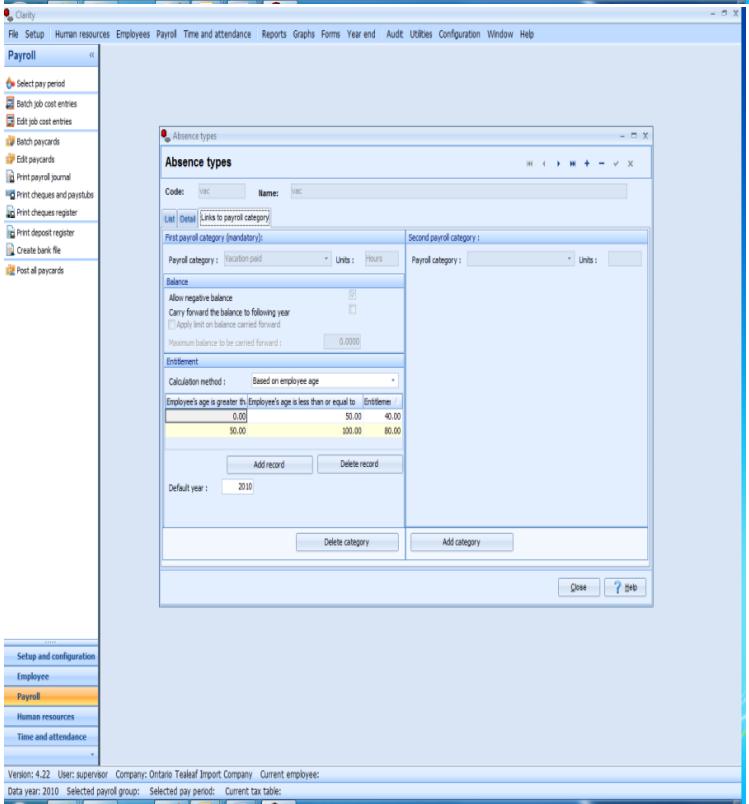
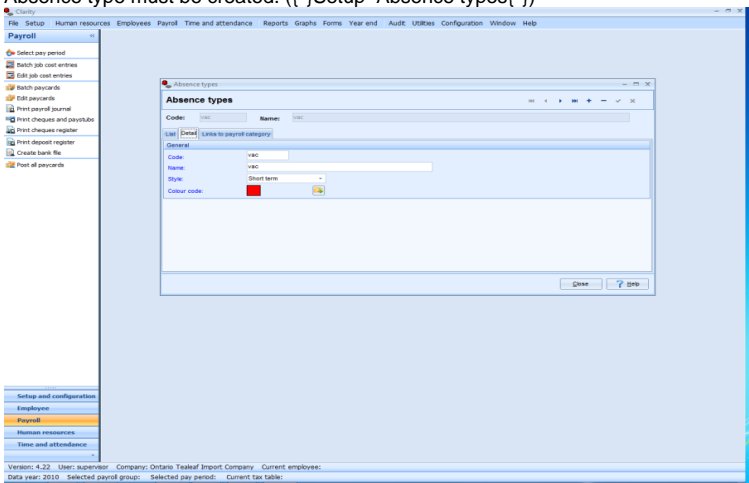
- Expense type must be defined. ({\*}Setup Attendance settings Expense types{\*)}

**Expense types**

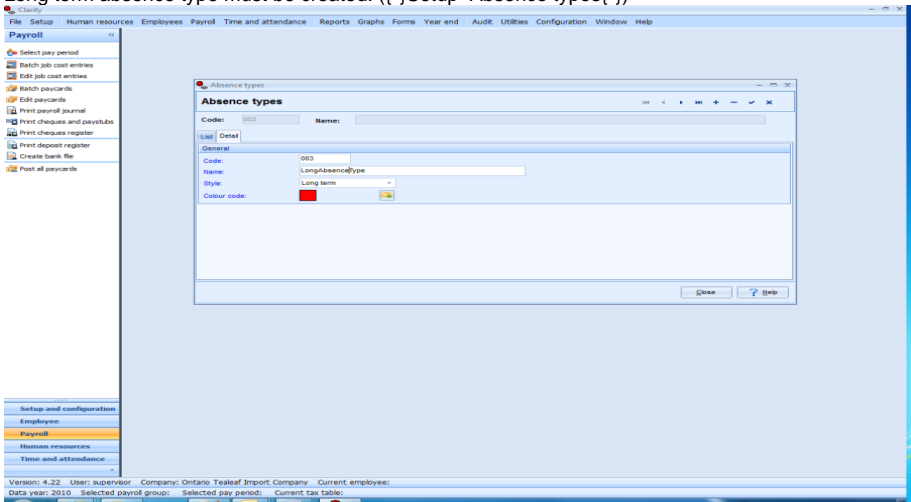
Code:   
Name: Travel  
Payroll category: 1090  
Tax tracking: ☐

Version: 4.22 User: supervisor Company: Ontario Tealeaf Import Company Current employee: Smith, Harold P  
Data year: 2010 Selected payroll group: Selected pay period: Current tax table:

- Absence type must be created. ({\*})Setup Absence types{\*)



- Long term absence type must be created. ({\*})Setup Absence types{\*)



- Employee entitlements must be set ({\*}Human resources Absence Absence entitlements{\*})

**Absence entitlements**

Number: 001 Name: Smith, Harold P

Employees Detail list Attachments

Absence type	Entitlements start date	Entitlements end date	Closed	Year
vac	01/01/2010	12/31/2010	No	2010

Show entitlements for: all open Add absence Delete absence

**Entitlements summary**

Payroll category	Carried over	Entitled	Adjustment	Taken	calc_Remaining	Unit
Vacation paid	0.0000	40.0000	0.0000	0.0000	40.0000	Hours

Close ? Help

Version: 4.22 User: supervisor Company: Ontario Tealeaf Import Company Current employee:  
Data year: 2010 Selected payroll group: Selected pay period: Current tax table:

- Absence planning could be set ({\*}Human resources Absence Absence planning)\*

**Absence planning**

Number: 001 Name: Smith, Harold P

Employees Detail list Attachments

Absence type	Planned from	Planned to
vac	01/25/2010	01/31/2010

Add record Delete record

Close ? Help

Version: 4.22 User: supervisor Company: Ontario Tealeaf Import Company Current employee:  
Data year: 2010 Selected payroll group: Selected pay period: Current tax table:

- Company calendar and weekends should be set ({\*}Company Holiday calendar{\*})

**Holiday calendar**

Calendar Year: 2016

Select Holiday Date

Description

Add

Remove

	Date	Description	Year
1	01/01/2016	New year	2016
2	02/15/2016	Family day	2016
3	03/25/2016	Good friday	2016
4	05/16/2016	Victoria day	2016
5	07/01/2016	Canada day	2016
6	08/01/2016	Civic day	2016
7	09/05/2016	Labour day	2016
8	10/10/2016	Thanks giving	2016
9	12/25/2016	Christmas	2016

Weekly days off

☒ Sunday ☐ Tuesday ☐ Thursday ☒ Saturday

☐ Monday ☐ Wednesday ☐ Friday

OK Cancel ? Help

- Rejection reasons must be created. ({\*})Setup Reasons Rejections{(\*)}

Clarity

File Setup Human resources Employees Payroll Time and attendance Reports Graphs Forms Year end Audit Utilities Configuration Window Help

Payroll

- Select pay period
- Batch job cost entries
- Edit job cost entries
- Batch paycards
- Edit paycards
- Print payroll journal
- Print cheques and paystubs
- Print cheques register
- Print deposit register
- Create bank file
- Post all paycards

Setup and configuration

Employee

Payroll

Human resources

Time and attendance

Version: 4.22 User: supervisor Company: Ontario Tealeaf Import Company Current employee:

Data year: 2010 Selected payroll group: Selected pay period: Current tax table:

Rejection reasons

Code	Name
001	Invalid Record
002	Not Approved work record

Close ? Help

Now you can start the web TnA application!

<http://<server address>/<virtual directory name>>

\*e.g. <http://localhost/tna>\*