CITADEL™

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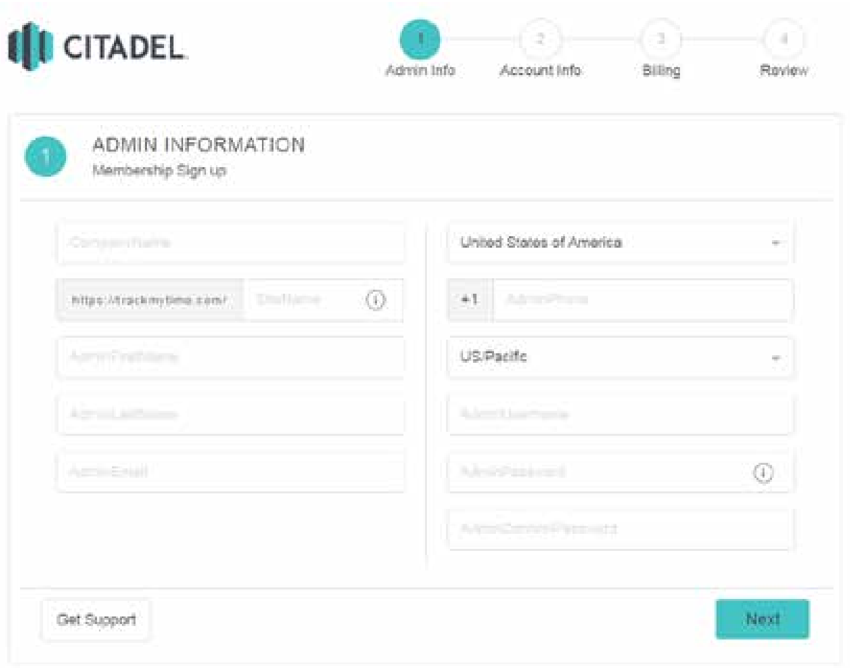
Building Your Citadel

After you have successfully connected your Citadel time clock to the internet using the provided onscreen instructions, open your web browser to **mycitadeltime.com/signup/dealer**. Enter your time clock **Dealer ID**, which can be found on the back of your **Quick Start Guide** included in your Citadel packaging.



Signing up for a Citadel monthly membership is an easy, four step process. First enter your **Administrator Information**. This includes your **Company Name, Site Name** (where you and your employees will log in), and the rest of your credentials to access your cloud account. The **Administrator** has universal access to the account with the ability to add or edit anything within the Citadel cloud account.

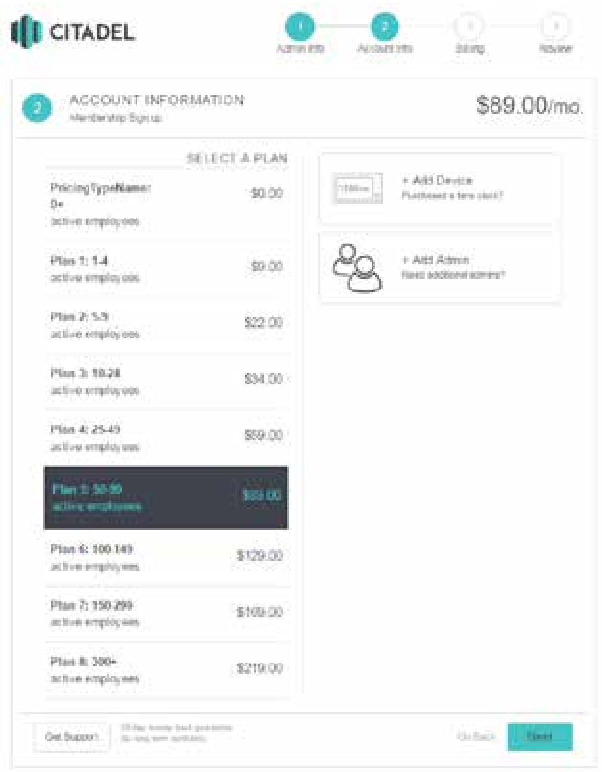
Click **Next**, when you are ready to move on.

Citadel time clocks run in conjunction with required highly affordable monthly cloud subscriptions. The plan you select will depend on how many people (active Citadel users) your business employs. No contracts and no commitments. Upgrade or downgrade any time.

Click **+Add Admin** to designate additional administrators, or you can add as many administrators as you later from within your account.

If you wish to purchase more than two time clocks, you will be assessed an additional fee of $10 per clock, per month, for each clock over two.

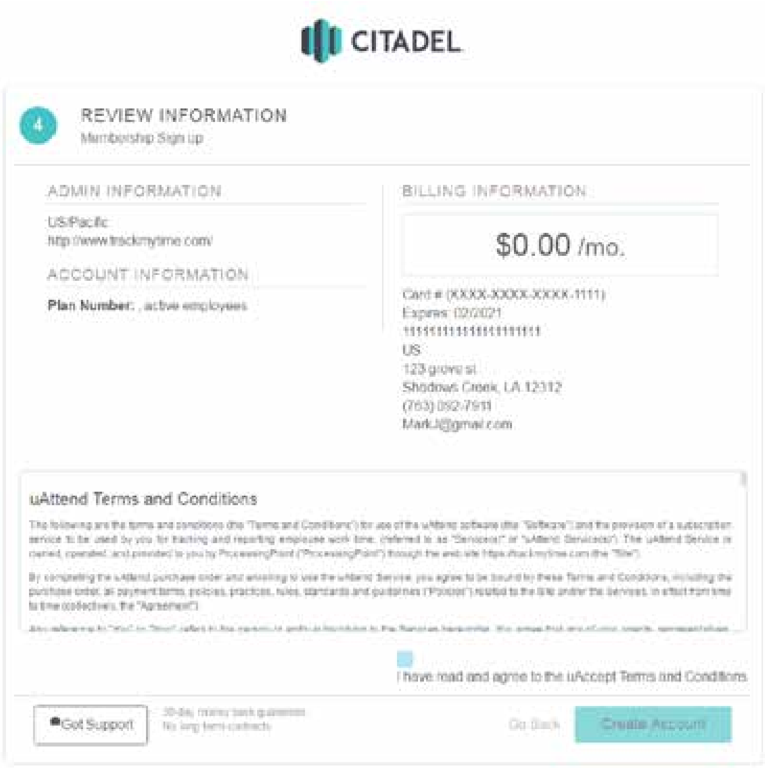
Click **Next** to move forward.



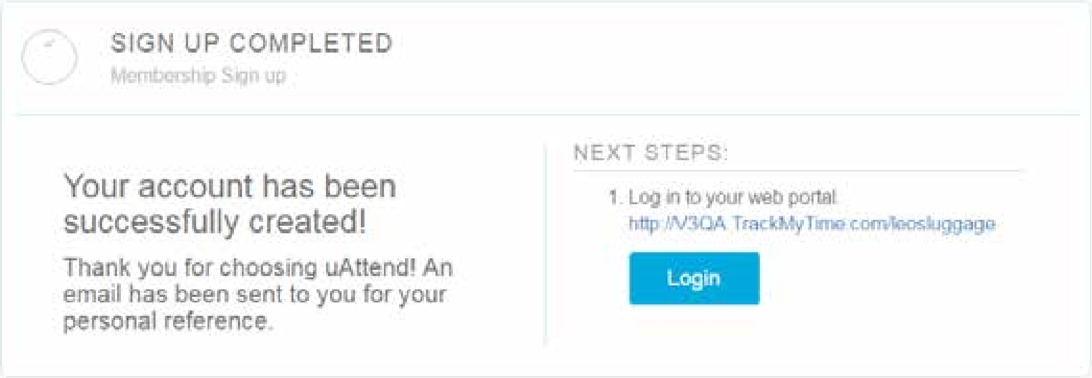
Carefully fill out the **Billing Information** sheet with the method you wish to pay with. Citadel accepts credit card or e-Check payments that will recur monthly.

Click **Next** to move forward.

Review Information to make sure all your account details are correct. Check the box indicating you have read and agreed to the Citadel Terms and Conditions and click **Create Account**. You will get a confirmation email to the address you provided with all your account information.



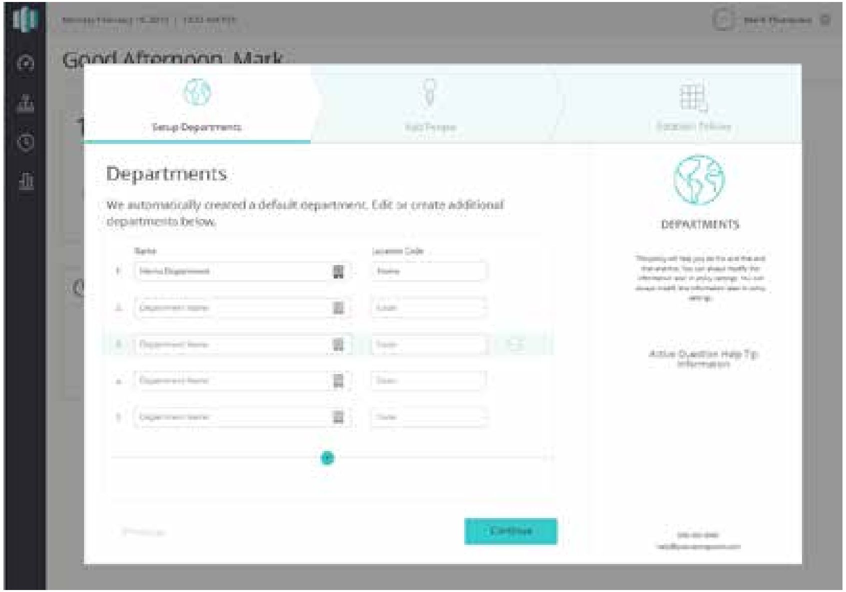
Click **Login** on your **Sign Up Completed** page to get inside of your Citadel account. Make sure to save or bookmark your personalized link for easy access.



Your Citadel Dashboard

Great! Now that you have signed up, it's time to set up your account. In next sections, you will be able to explore the many features of your Citadel account. Before moving forward, you will be prompted to go through the **Setup Wizard**, helping you with setting up your policies, departments and other components with the basics to make Citadel function.

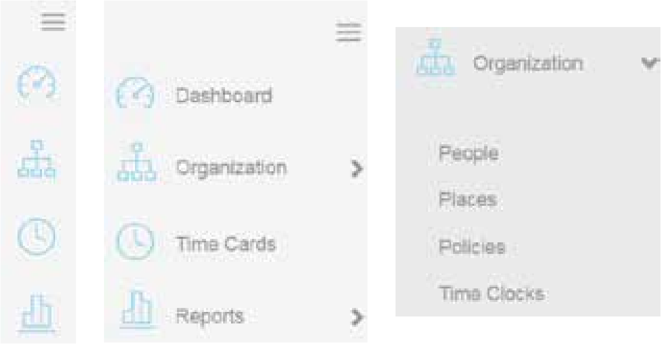
We highly recommend going through the entire **Setup Wizard** to make your account easier to use, but you are also able to breeze ahead after a **Department** and **Pay Period Policy** are completed. All of the customizable Citadel options will be gone over in this manual.



The first screen shown will be where you and your employees punch in and out, depending on the access levels you set, and if you allow web punching. The current time cards will also be available to view.

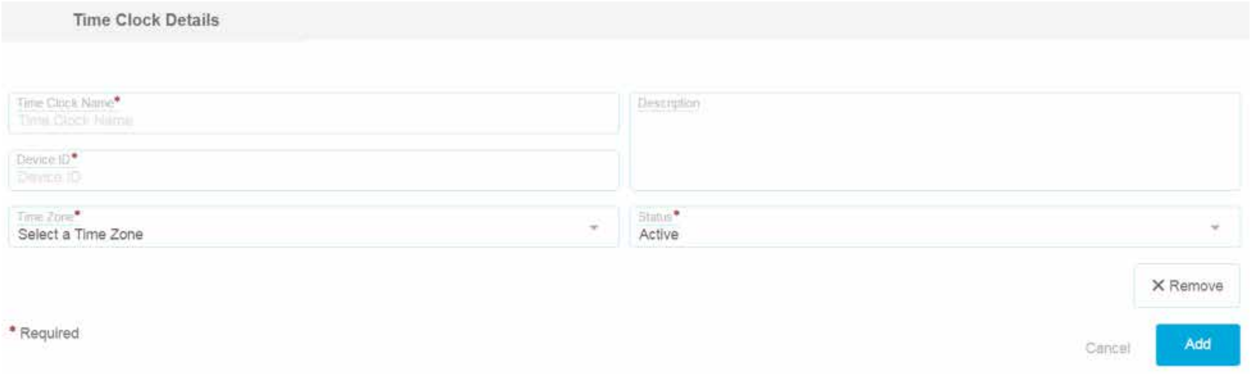
***A punch management policy must be implemented before any of these features are activated. ***

On the left hand side of your screen, you will see a vertical menu with four options.



In the **Organization** drop down menu, navigate to the **Time Clocks** option to add your Citadel device. Connect your device to the internet using the onscreen instructions via WiFi or LAN. Once connected, your clock will show up on the **Time Clocks** page to add to your account. If you have yet to connect to the internet, then click on **Add New**.

In this section, you decide on a **Time Clock Name**, enter your **Device ID** (Found on the back of the **Quick Start Guide**), Select a time zone, and set your status to **Active**. The **Description** field is optional and can be used to describe qualities unique to that clock. Click **Add.**

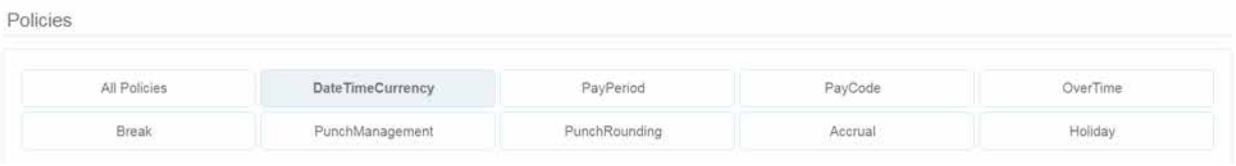


Policies

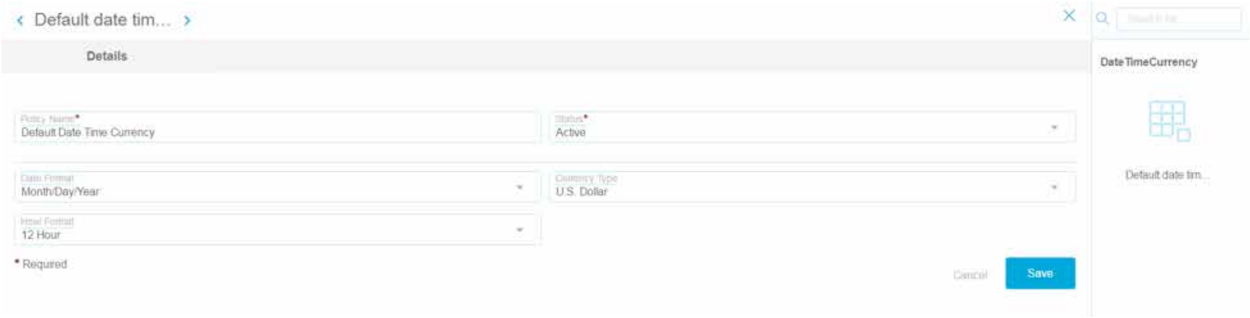
Your next step is to add the appropriate policies to your account. Your policies include the customizable settings and criteria that apply to your employees. Your account includes three assigned default policies. The default policies are **Date Time Currency**, **Punch Management**, **Pay Code** and **Pay Period**, these are not editable. A user may add more policies and set others to archived.

To start the policy creation process, go to the **Organization** drop down menu on the left side of your screen and select Policies.

Below, we will guide you through each policy option to fully inform you to create the best possible experience for you and your employees.



You have the option to edit your **Default Date Time Currency**, but not delete it. You may also create a new policy. Click into the **Default Date Time Currency** to begin the editing process.

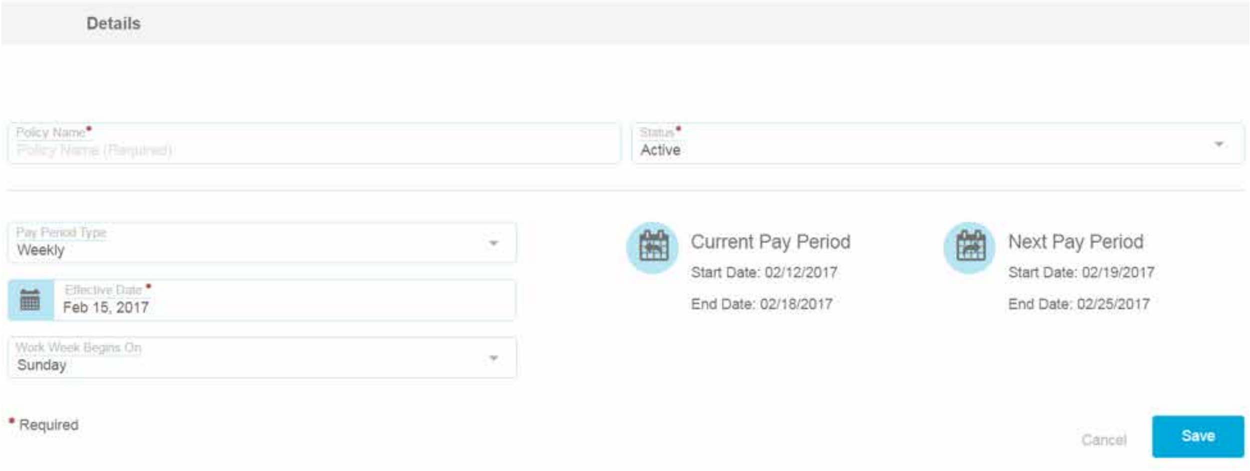


The following steps are completely optional.

1. Choose your **Policy Name**. We recommend you keep it simple. For example, if you have multiple offices across the country, you may want to name this policy **West Coast Office**.
2. Your default **Status** is Active. You may Archive your policy if it is no longer applicable.
3. Choose the format you would like the **Date Format** to be presented from the dropdown menu.
4. Choose between standard 12 hour or military 24 hour in the **Hour Format** dropdown menu.
5. In the **Currency Type** dropdown menu, you may choose the currency you wish to use when compensating your employees.

Click **Save** and move on to you next policy of choice.

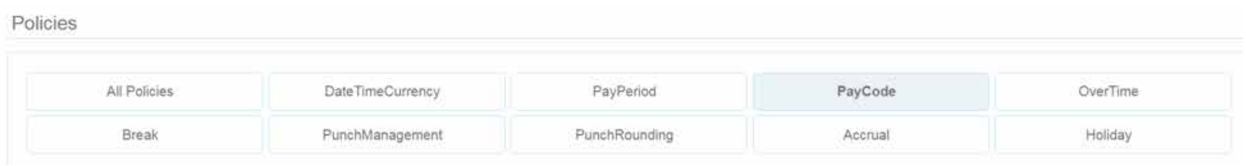
You may edit, but not remove, your **Default Pay Period**. Enter the **Pay Period** tab, click into the default policy to begin the editing process.



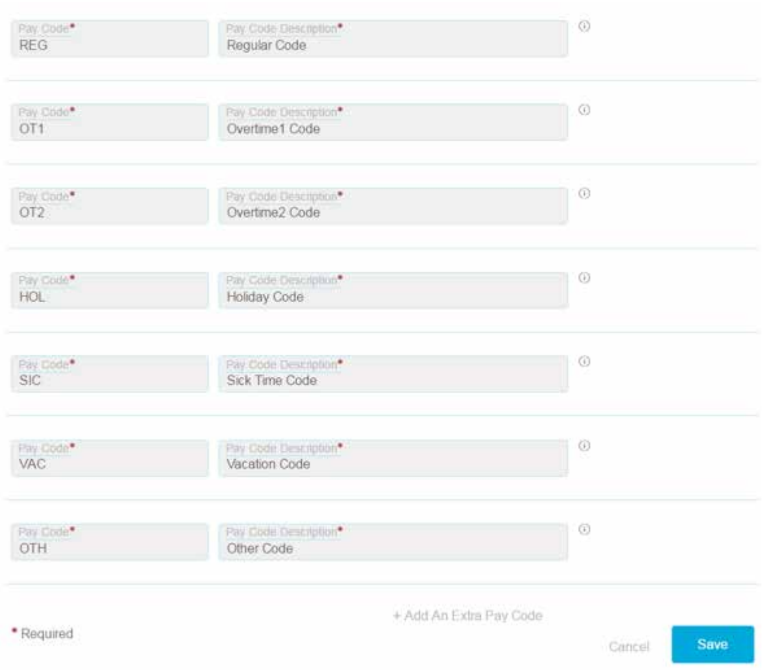
The following steps are completely optional.

1. Choose your **Policy Name**. For example, if you will have multiple pay periods for different departments, you may want to name this policy **Sales Dept Pay Period**.
2. Your default **Status** is **Active**. You may **Archive** your policy if it is no longer applicable.
3. Choose your **Pay Period Type** from the dropdown menu. Choose from weekly, biweekly, semimonthly, or monthly.
4. Click and select the **Effective Date** from the pop up calendar. This is when your pay period will begin.
5. Choose the day your **Work Week Begins On** from the drop down menu.

Click **Save** and move on to you next policy of choice.



The **Pay Code** tab is also set to default, and contains a series of default pay codes associated with various pay code descriptors. Pay codes allow you to easily identify what is abbreviated on employee timecards. These are usually acronyms of what they represent. Ultimately, the pay code is just a qualifier that groups polices together on the user time card. The following are the **Default Pay Codes**.



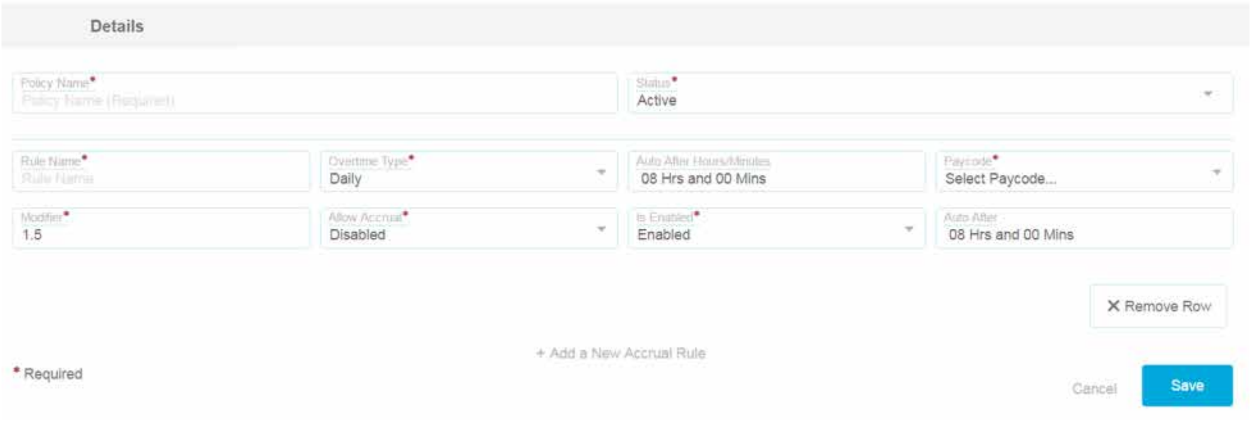
If you would like to create more pay codes, follow these steps.

1. Click **+Add** an **Extra Pay Code** to set your **Pay Code Rules**.
2. Choose your **Pay Code Name**.
3. Choose your **Pay Code Description**.

Click **Save** and move on to you next policy of choice.

The **Over Time** tab allows you to set the overtime rates and parameters for any departments or employees. Click **Add New** to start the policy creation process.

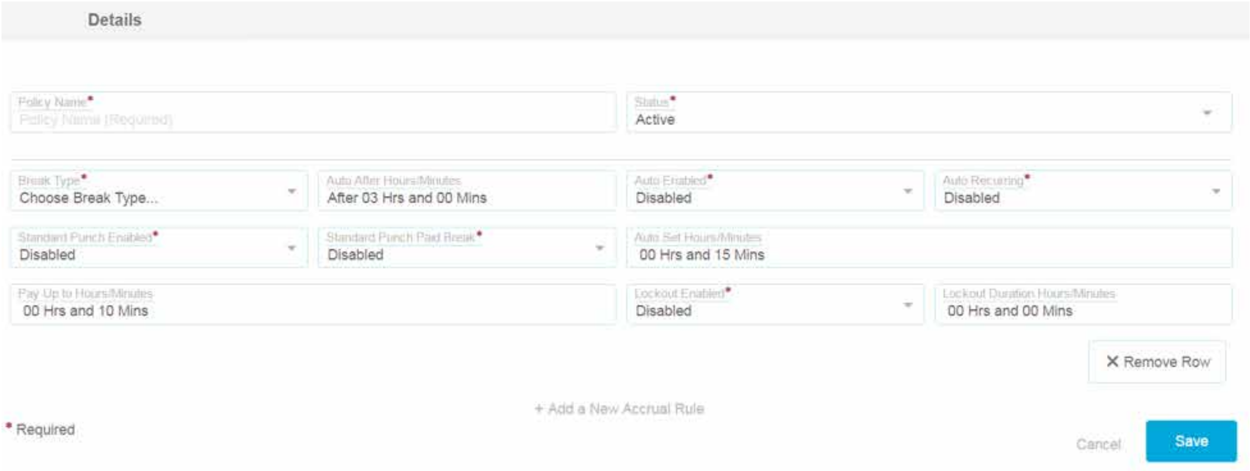
1. Choose your **Policy Name**. For example, if you have multiple overtime rates, you can name the policy **Overtime Policy 1**. Your default Status is active, you may archive your policy if it is no longer applicable.
2. Choose a **Rule Name** and **Overtime Type** from the dropdown menu. This will dictate when you provide overtime to your employees. You may also set **Allow Accrual** to disabled or enabled.
3. Enter your **Modifier**, which signifies the rate at which overtime will be paid.
4. In **Auto After Hours/Minutes**, decide how many hours need to be worked in a day to begin paying overtime. This field may also be enabled or disabled.
5. Select a **Paycode** that you already created in the previous policy.



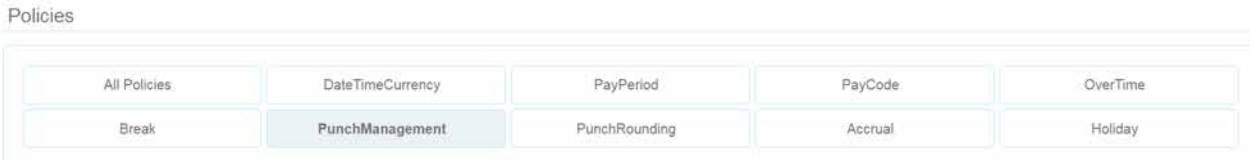
Click **Save** and move on to you next policy of choice.

The **Break** tab gives you the ability to determine when, how long, and the pay rate of employee lunch and breaks. Click **Add New** to start the policy creation process.

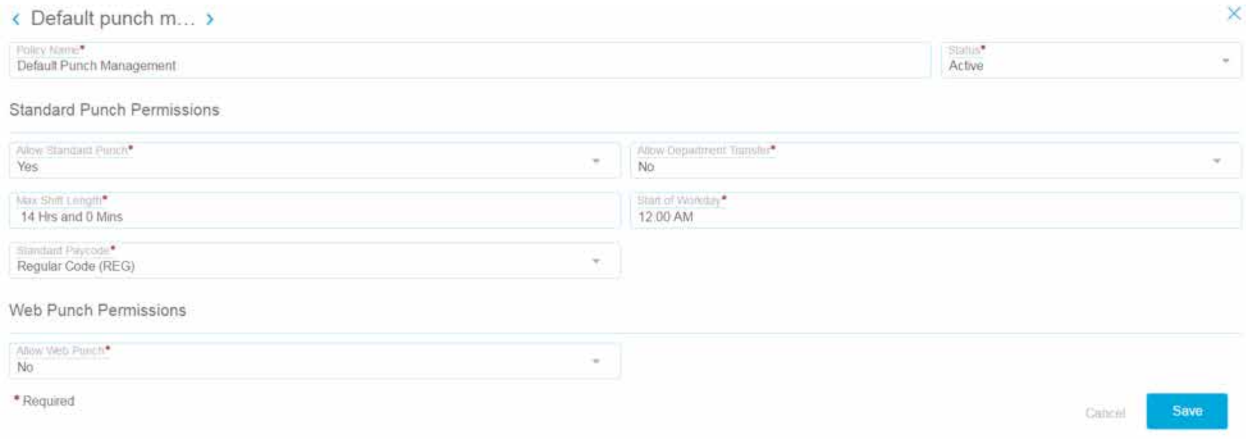
1. Choose your **Policy Name**. For example, **Weekday Lunch Break** could be the name to easily remember that it covers the entire week.
2. From the dropdown menu, choose your **Break Type**. This will be either lunch or break. You may enable or disable a **Standard Punch Deduction**.
3. You may enable or disable the **Auto Enable** feature, as well as **Auto Recurring**.
4. You may enable or disable **Standard Punch Enabled**, as well as **Standard Punch Paid Break**.
5. In **Auto Set Hours/Minutes**, decide how long the automatic break will last.
6. In **Pay Up to Hours/Minutes** decide if or how much of the break total will be paid for.
7. Enable or disable the **Lockout Enabled** field and set the **Lockout Duration Hours/Minutes**. This would prevent employees clocking in or out of their breaks too early or late.



Click **Save** and move on to you next policy of choice.

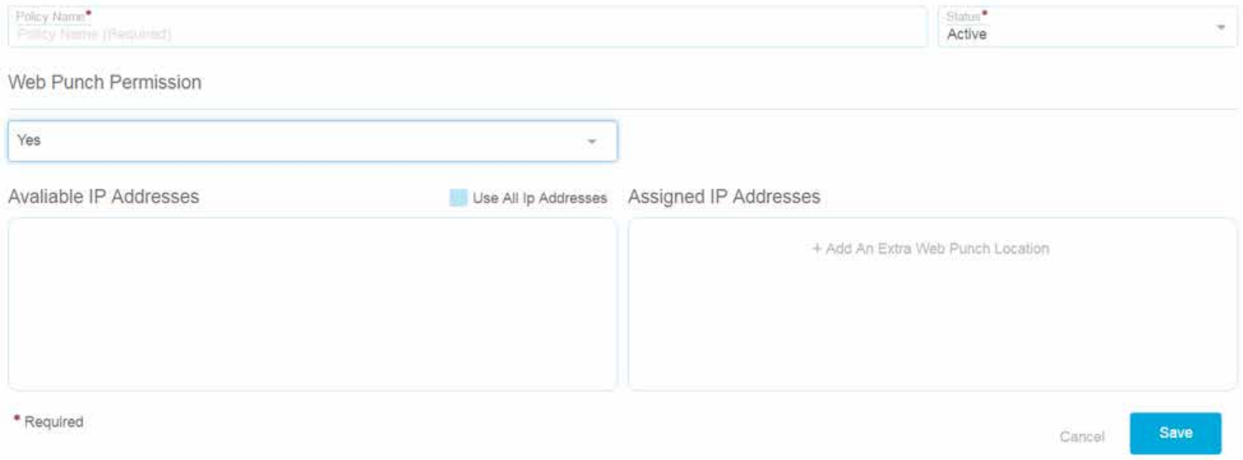


The **Punch Management** tab allows you to set web and mobile punch rules depending on how or from where you wish to have employees punch in or out. Your **Citadel** account includes a **Default Punch Management** that you may edit, but not delete. This is also where you can create a new policy to allow web punching.



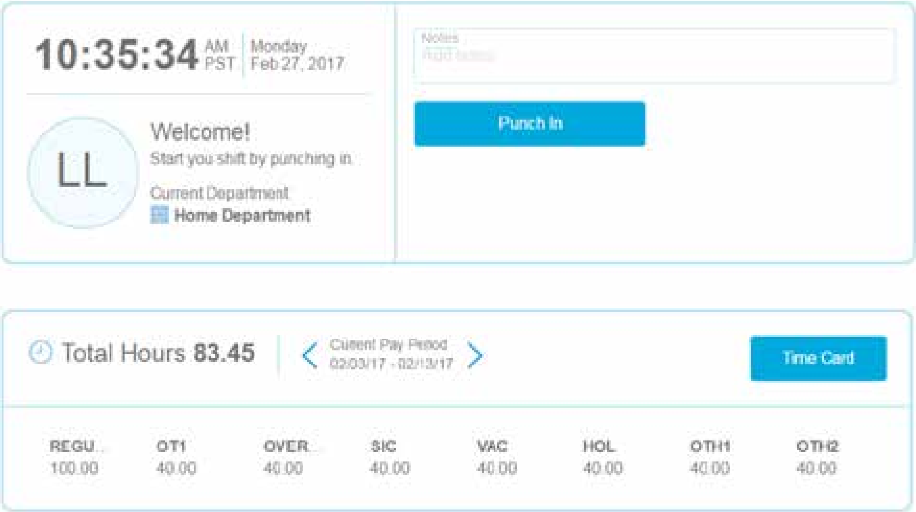
Click **Add New** to start the policy creation process.

1. Choose your **Policy Name**. For example, **Web Punch** could be the name to simply describe what the policy is.
2. Your default **Status** is active, you may archive your policy if it is no longer applicable.

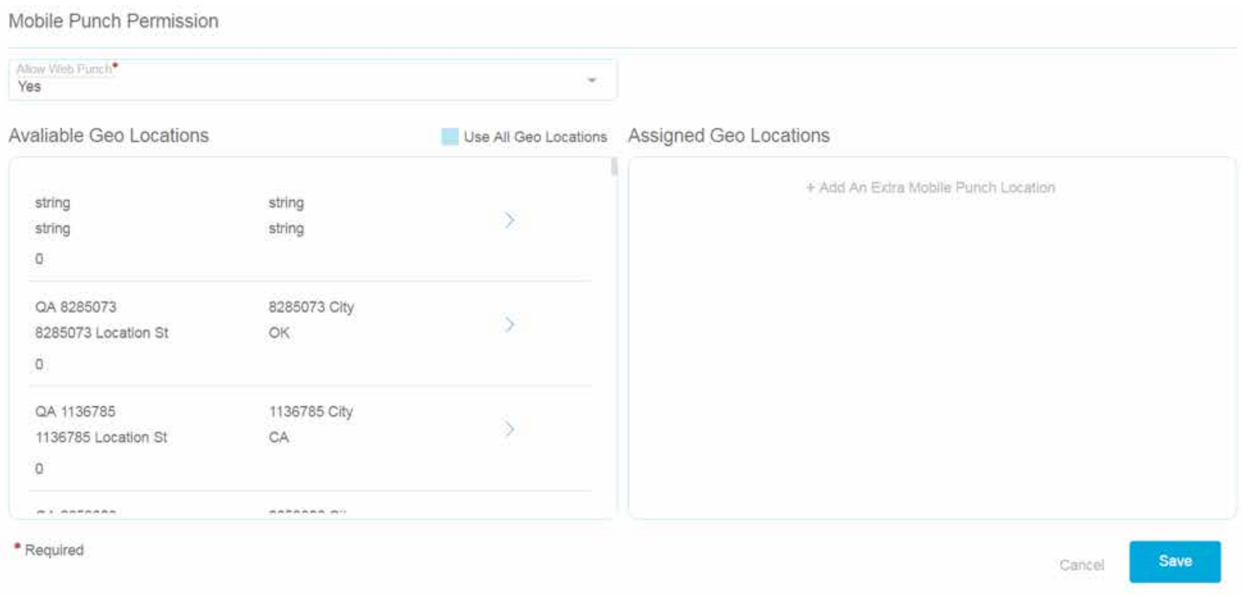


3. In the **Allow Web Punch** dropdown menu, decide if web punching will be allowed from an internet connected device. If you choose **Yes**, more steps will drop down below.
4. **Available IP Addresses** will populate based on what devices are in your proximity. Select which IP address you wish to allow.
5. **Assigned IP Addresses** will list the chosen IP addresses for web punch ability. Click **Add An Extra Web Punch Location** allows you to designate more web punch options.

If you enable web punching for an employee, their dashboard will look like:

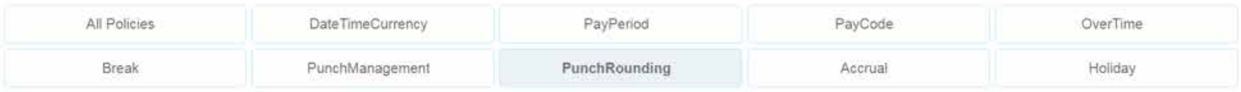


Click **Save** and move on to you next policy of choice. Follow the same steps to determine **Mobile Punch** rules.



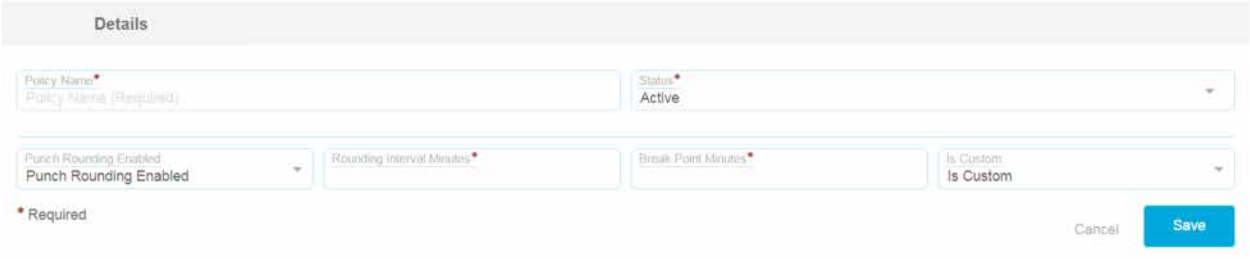
Available Geo Locations allow you to designate a specific radius in which web punching is to be allowed. Click the right arrow to add to the list of **Assigned Geo Location**s.

Click **Save** and move on to your next policy of choice.



The **Punch Rounding Tab** allows you to round employee punches to your own specification. For example, you could set a 5 minute rounding interval that would round to the closest hour. Here's how.

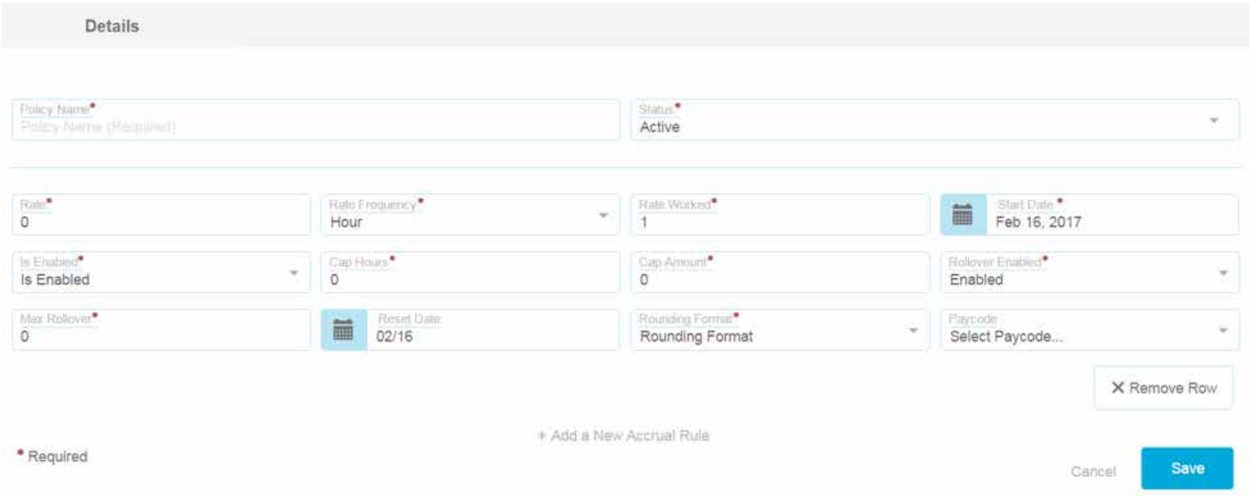
1. Choose your **Policy Name**. For example, **Punch Round 1** could be the name to simply describe what the policy is. The **Status** is set to active as a default.
2. Enabled or disable **Punch Rounding Enabled** and enter in the **Rounding Interval Minutes**.
3. **Break Point Minutes** sets the amount of time that can pass before the rounding becomes void and flows into the next closest round.
4. Enable or disable is **Custom**.



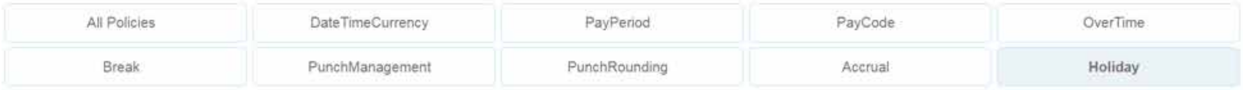
Click **Save** and move on to your next policy of choice.

The **Accrual** tab allows you to set accrual rates based on specific parameters of your workforce. Click **Add New** to start the policy creation process.

1. Choose your **Policy Name**. For example, **Vacation** could be the name to differentiate from any other accrual rates you may have. The **Status** is set to active as a default.
2. Set your **Rate** of accrual to determine the number of hours that will add to the employee total. To ensure accrual begins, set **Is Enabled** to **Enabled**.
3. **Rate Frequency** would apply to how often the rate is applied to the total accrual.
4. Set the **Rate Worked** to the unit desired. Enter the **Start Date** to reflect when the accrual policy begins.
5. **Cap Hours** allows you to set the maximum hours accrued. **Cap Amount** allows you to set the maximum total accrual amount. Once a user hits their accrual cap, no more hours will be accrued until the total dips below the cap.
6. Enable or disable accrual rollover in **Rollover Enabled**. Set the **Max Rollover** and **Reset Date**.
7. Select your **Rounding Format** and select the **Paycode** you wish to associate with the accrual policy.



Click **Save** and move on to your next policy of choice.



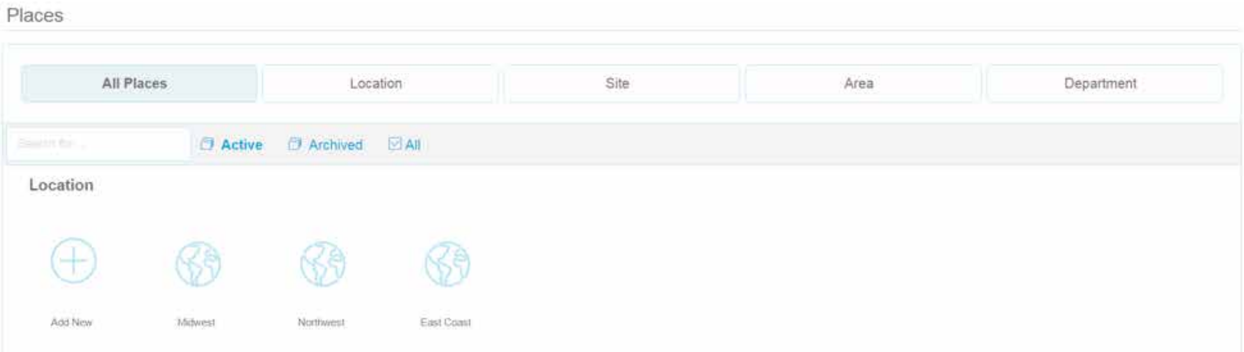
The **Holiday** tab allows you to determine holiday pay rates. Click **Add New** to start the policy creation process.

1. Choose your **Policy Name**. For example, **Holiday Pay 1** could be the name to differentiate from any other holiday pay policies you may have. The **Status** is set to active as a default.
2. Click **Add** a new **Holiday Rule** to detail your holiday policy.
3. Enter your **Holiday Rule Name**. For example, you can name this rule **Christmas**.
4. **Holiday Type** determines if the holiday is fixed or floating. In this example, **Christmas** falls on the same date every year, December 25th, so it is a **Fixed holiday**.
5. Select the **Paycode** to associate with your holiday rule.
6. Select the **Month**, **Day**, and **Week**, as well as the **Day of Week**.
7. Choose if the Is **Work Day**, **Is Paid**, **Is Enabled**, and Is **Recurring** will be enabled or disabled.

Click **Save** complete your policy set up. Go back and add more at any time.

Your next step will be to populate your **Citadel** cloud account with **Places**. Imagine places as a hierarchical pyramid where every category operates as a parent to the one below it. This means that any policy applied to a parent, is also applied to the children, unless a policy has been assigned to that person beforehand.

To start, let's go through how to set up a **Location**, which is the highest level of authority. Let's operate under the assumption that you might have a national business with offices throughout the United States.

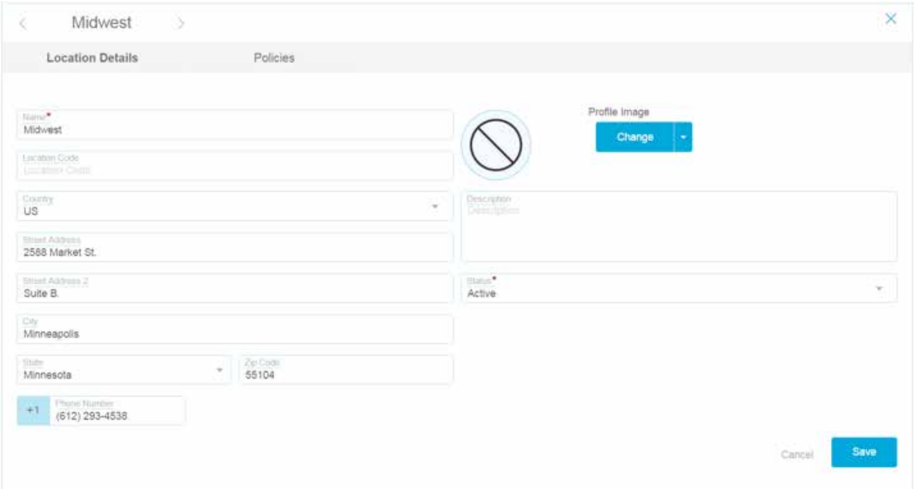


Click **Add New** to create a new location.

1. Choose a **Name** for tour location. This could be divided by country, regional in the US, or however you would like to set it up. In this case, the location is Midwest. You may choose a **Profile Image** as well. The **Status** is active by default.

The rest of the fields are optional.

2. You may choose your **Location Code**. This can be whatever you want it to be.
3. You may choose your **Country** from the dropdown menu. In this example, we are choosing **US**.
4. You may enter your **Street Address**, **Street Address 2**, **City**, **State**, **Zip Code**, and **Phone Number** as you see fit.



5. In the **Policies** tab, you may apply any of your existing policies that were created in the previous section to your location.

Click **Save**, add more locations or continue to the next **Place**.

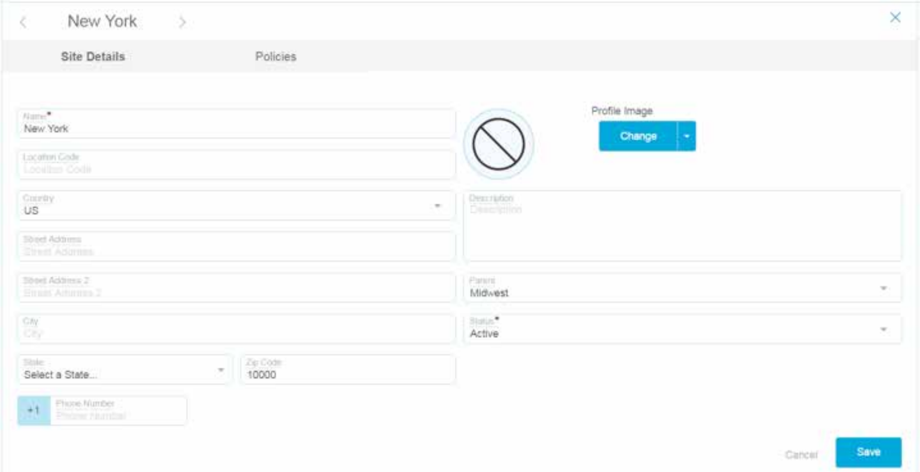
The **Site** and **Area** tabs for **Locations** work the same way in their creation. Click **Add New** to create a new site and fill out your **Site Details**.

1. Enter a **Name**. This can describe a state, county, city, or any division you would like it to be. You may choose a **Profile Image**.

The rest of the fields are optional.

2. The **Status** is active by default.
3. Enter in your **Location Code**.

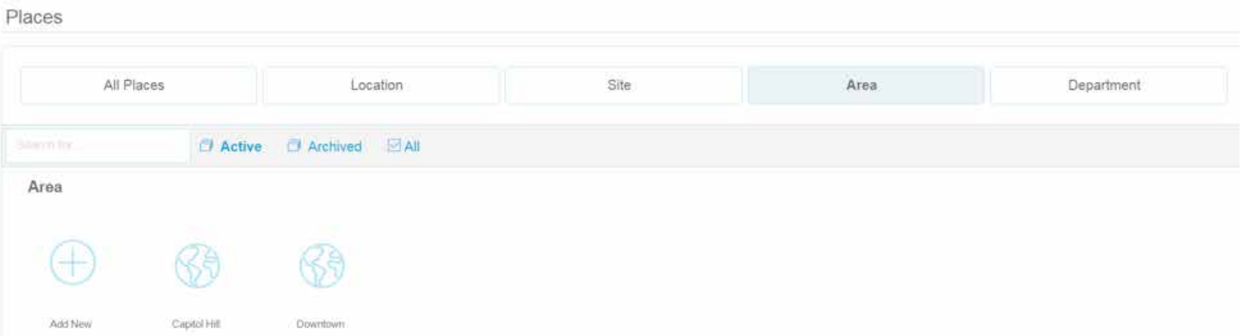
4. Fill out your **Street Address**, **Street Address 2**, **City**, **State**, **Zip Code**, and **Phone Number**.
5. In the **Parent** tab, you may choose the parent **Location** if you wish, or it can be a standalone site.



6. In the **Policies** tab, you may apply any of your existing policies that were created in the previous section to your site.

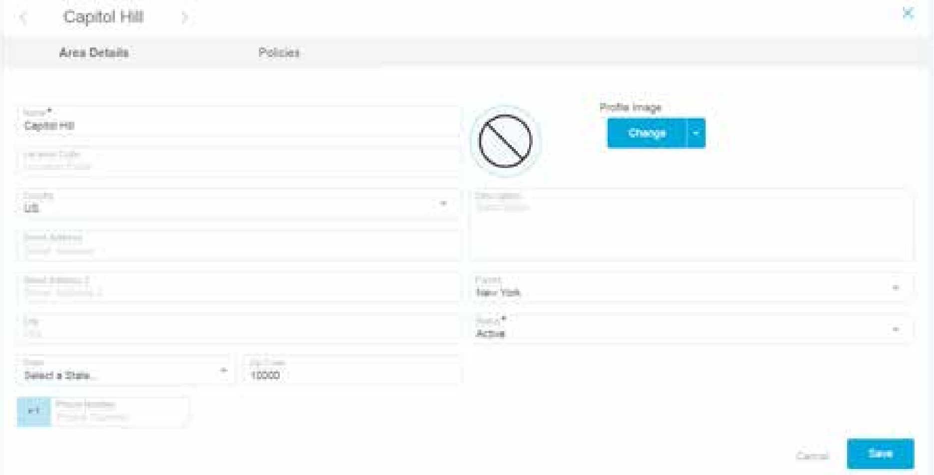
Existing policies can be added with the click of a button. On the right hand column, you will see a grid like icon.  . Click the icon and select from the policy you wish to apply from the dropdown menu.

Click **Save**, add more sites or move on to the **Area** tab if you wish.



Click **Add New** to create a new **Area**.

1. Enter a **Name.** This can describe a state, county, city, or any division you would like it to be. You may choose a **Profile Image**.



The rest of the fields are optional.

2. The **Status** is active by default.
3. Enter in your **Location Code**.
4. Fill out your **Street Address**, **Street Address 2**, **City**, **State**, **Zip Code**, and **Phone Number**.
5. In the **Parent** tab, you may choose the parent **Location** if you wish, or it can be a standalone site.
6. In the **Policies** tab, you may apply any of your existing policies that were created in the previous section to your site.

Existing policies can be added with the click of a button. On the right hand column, you will see a grid like icon. . Click the icon and select from the policy you wish to apply from the dropdown menu.

Click **Save**, add more areas or move on to the **Department** tab if you wish.

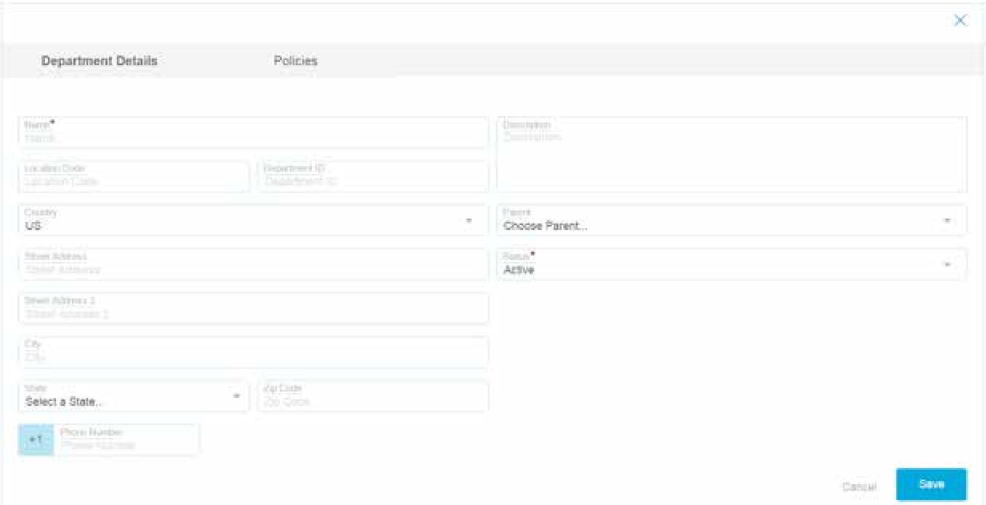
Click **Add New** to create a new **Department**.

1. Enter a **Name**. This can describe a state, county, city, or any division you would like it to be. You may choose a **Profile Image**.

The rest of the fields are optional.

2. The **Status** is active by default.
3. Enter your **Location Code**.
4. Enter your **Department Code**.
5. Fill out your **Street Address**, **Street Address 2**, **City**, **State**, **Zip Code**, and **Phone Number**.
6. In the **Parent** tab, you may choose the parent **Location** or **Site** if you wish, or it can be a standalone **Area**.

7. In the **Policies** tab, you may apply any of your existing policies that were created in the previous section to your site.

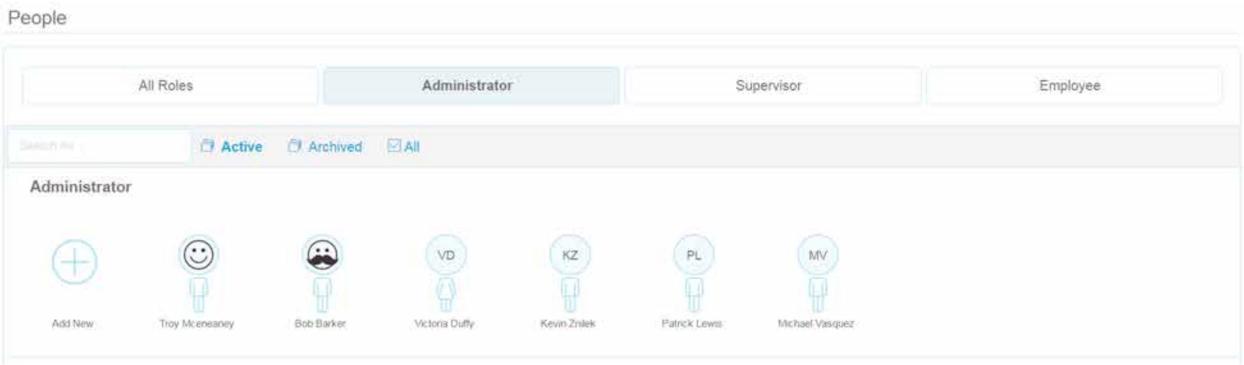


Department Transfers

If a user transfers departments, they will still maintain the policies from their home department. If you would like for the user to inherit the policies of the department they were transferred to, a new series of policies need to be created and applied.

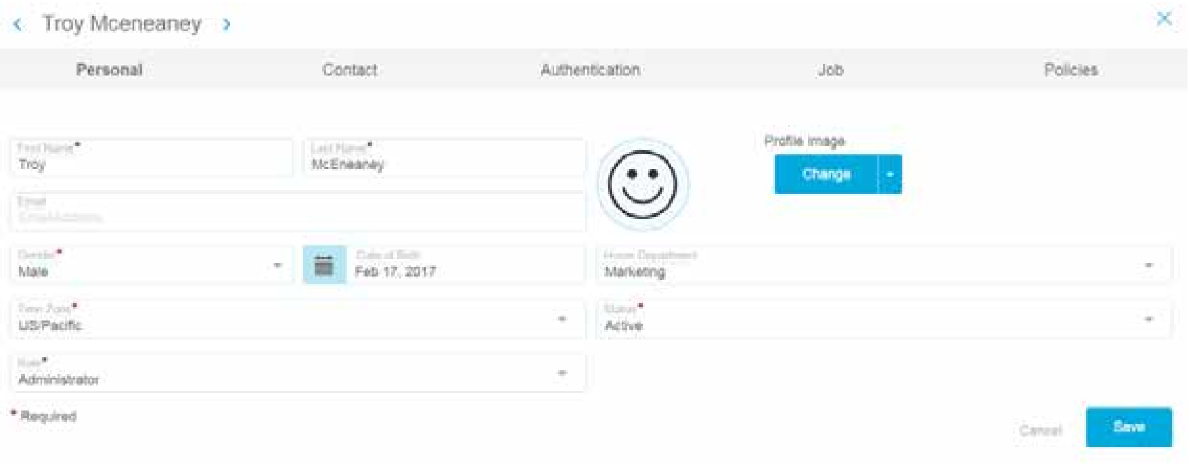
Existing policies can be added with the click of a button. On the right hand column, you will see a grid like icon. . Click the icon and select from the policy you wish to apply from the dropdown menu.

Great! You are done adding **Places** for now. The next step is to add **People** to your **Citadel** account. The **People** category is divided into three tiers, **Administrator**, **Supervisor**, and **Employee**. In this section, you will find out the difference between the three and learn how to set access levels and assign each person to their respective category. Remember, you can repeat the processes below to reflect the amount of people employed by your business. Let's start with **Administrator**.



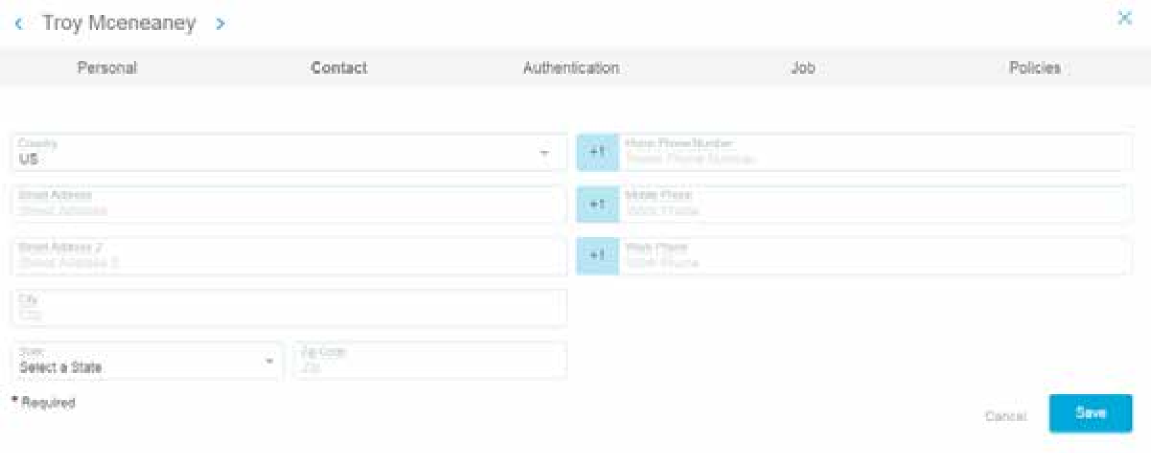
Click **Add New** to begin adding an **Administrator**. You will begin in the Personal tab.

1. Add the administrator **First Name** and **Last Name**. The **Status** is set to active by default.
2. You may add a **Profile Image**.
3. You may select the **Gender** from the dropdown menu.

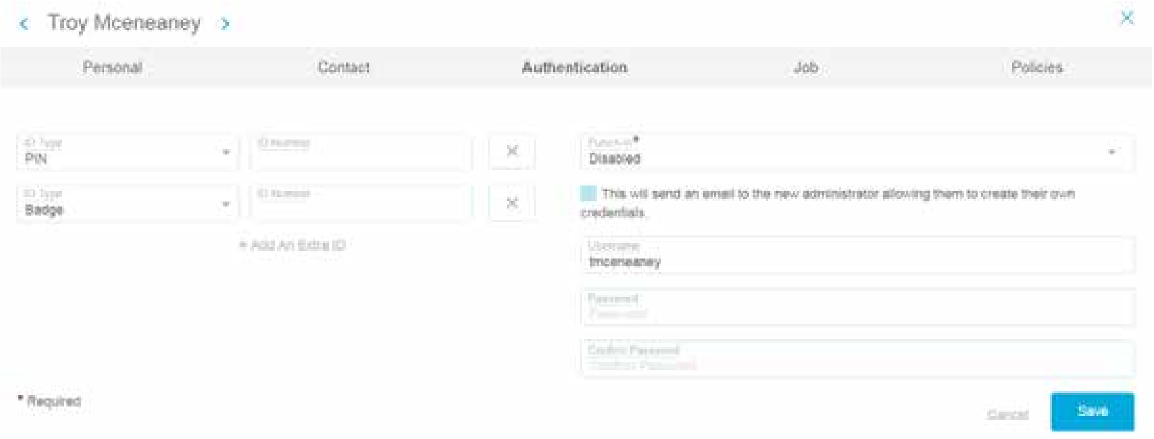


4. You may enter the **Date of Birth**.
5. Select a **Time Zone** from the dropdown menu.
6. Select the **Role** from the dropdown menu. In this case, it is the administrator.
7. You may select the home department if applicable.

The rest of the tabs are optional to populate with data. Next, move to the **Contact** tab. This tab contains the optional personal information such as **Address** and **Phone Number**.

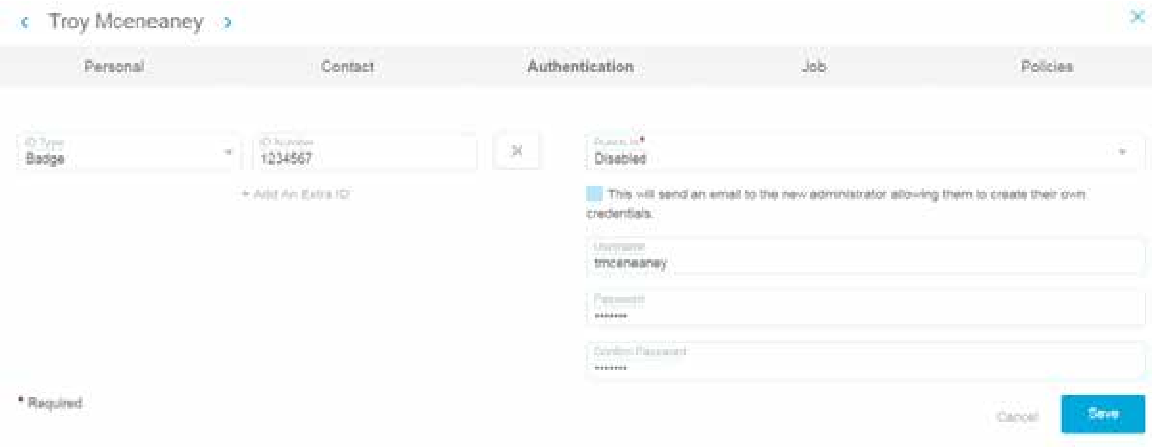


Next, move on to the **Authentication** tab. This is where you can configure the credentials for administrators, supervisors and employees, which they will use to access their account.



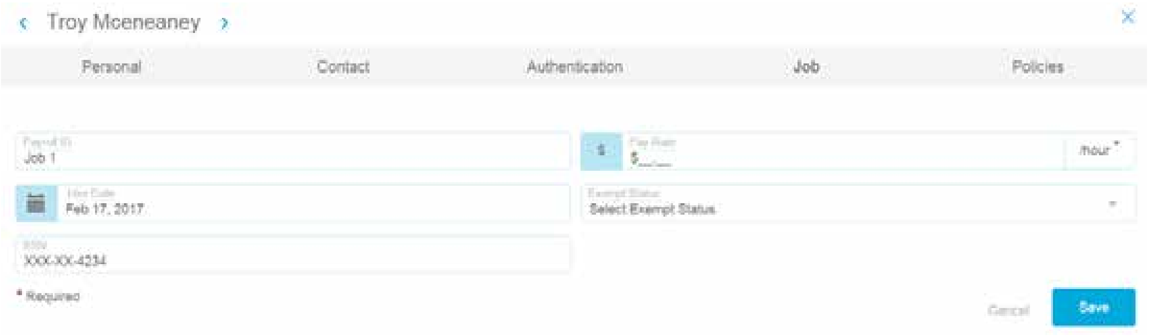
1. Select the **ID Type** from the dropdown menu. In this case, this is to determine the way the **Administrator** will interact with the **Citadel** device and account.

2. Select **Enabled** or **Disabled** in the **Punch** In dropdown menu. This is to determine if the administrator or other person will be able to punch in through the **Citadel** cloud account.
3. Enter the desired **Username**, enter and confirm the desired **Password**. If you check the blue box next to the test **“This will send an email to the new administrator allowing them to create their own credentials.”**
   An email will be sent to the administrator to create their own username and password.



Move over to the **Job** tab. These fields are optional.

1. Enter your desired **Payroll ID**.
2. Enter your desired **Hire Date**.
3. Enter your desired **SSN (Social Security Number)**.
4. Determine the hourly **Pay Rate**.
5. Select the **Exempt Status** from the drop down menu.



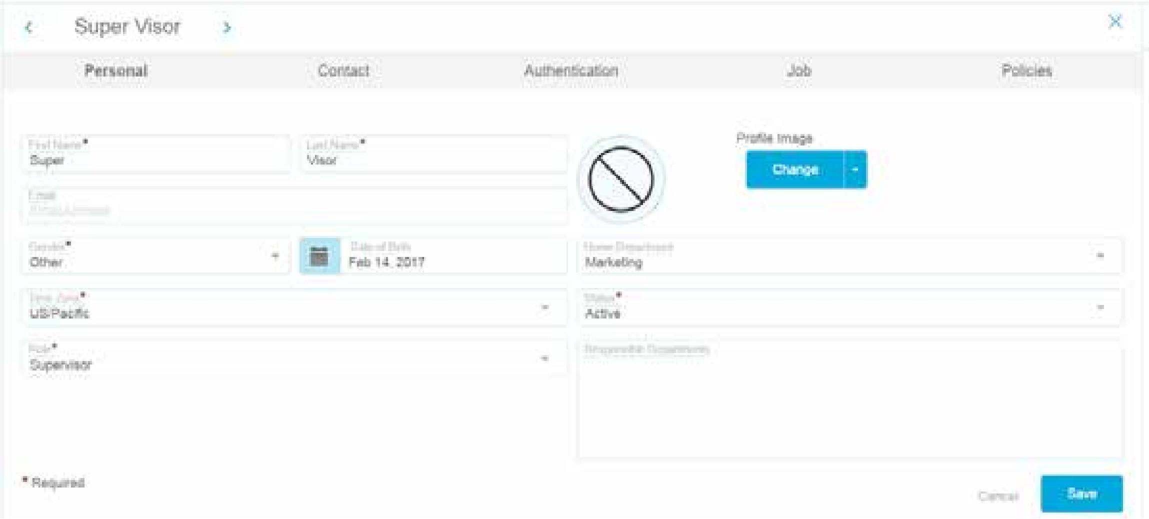
Move over to the **Policies** tab. This is where you can choose to apply the policies you determined earlier to the selected administrator.

Existing policies can be added with the click of a button. On the right hand column, you will see a grid like icon.  . Click the icon and select from the policy you wish to apply from the dropdown menu.

Click **Save** and move on to the **Supervisor** tab.

Click **Add New** to begin adding a **Supervisor**. You will begin in the **Personal** tab.

1. Add the administrator **First Name** and **Last Name**. The **Status** is set to active by default.
2. You may add a **Profile Image**.

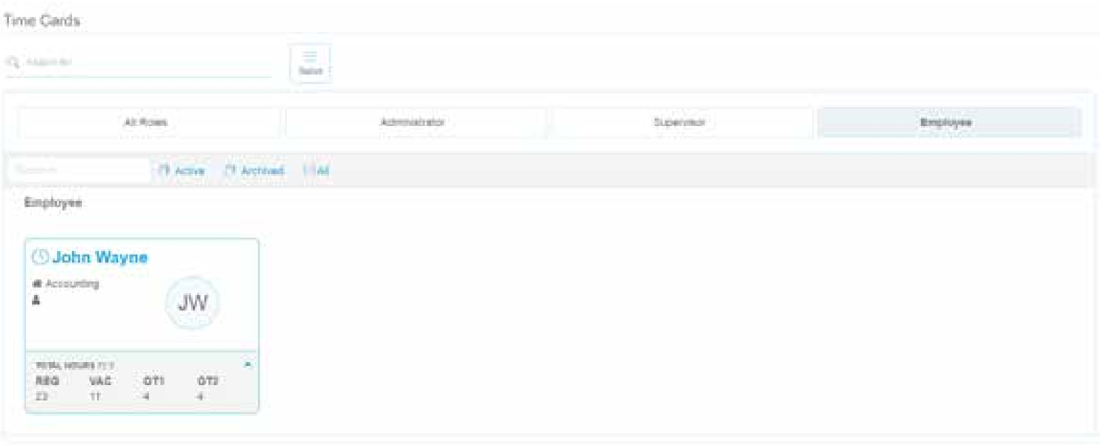


3. You may select the **Gender** from the dropdown menu.
4. You may enter the **Date of Birth**.
5. Select a **Time Zone** from the dropdown menu.
6. Select the **Role** from the dropdown menu. In this case, it is the administrator.
7. You may select the home department if applicable.

The rest of the tabs are optional to populate with data. Next, move to the **Contact** tab. This tab contains the optional personal information such as **Address** and **Phone Number**.

Time Cards

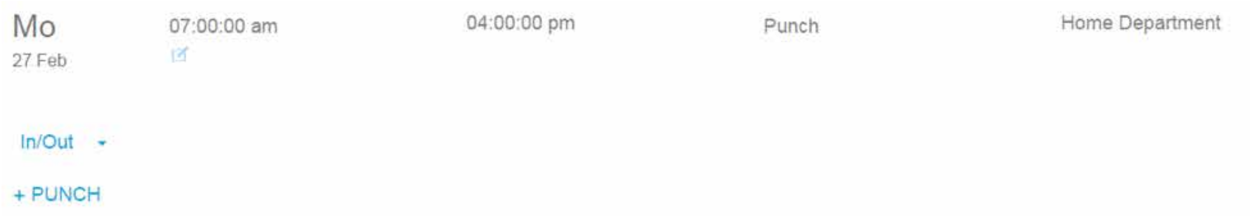
The **Time Cards** section can be accessed through the panel on the left. This is where you can see all your employee, supervisor, and administrator time cards in one place. You can also click through the tabs to view any of those categories individually.



The account administrator can edit all time cards associated with the company. For example, If an employee missed a punch out, follow these steps to manually punch out for them so the time card reflects total hours worked.

1. Locate the employee time card, click on the bold blue name at the top.

2. Find the date you wish to edit and click on the **+PUNCH** text



3. You will then be directed to this part where you can manually edit the punches as you see fit.