



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.



LET'S GET STARTED

To begin, enter your Dealer ID

[Where is my Dealer ID?](#)

Next

[Need help? Get Support](#)



1 ADMIN INFORMATION
Membership Sign up

Company Name	United States of America
Company Website <input type="text" value="https://trackmytime.com/"/> <small>Site Name</small> ⓘ	+1 <input type="text" value="AdminPhone"/>
Admin First Name	US/Pacific
Admin Last Name	<input type="text" value="AdminLast Name"/>
Admin Email	<input type="text" value="Admin Password"/> ⓘ
	<input type="text" value="Admin Confirm Password"/>

[Get Support](#) [Next](#)

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.

The screenshot shows the Citadel Account Information page. At the top, there is a progress bar with four steps: 1 Admin Info, 2 Account Info (current), 3 Billing, and 4 Review. The main heading is "ACCOUNT INFORMATION" with a sub-heading "Membership Sign-up" and a price of "\$89.00/mo.". Below this is a "SELECT A PLAN" section with a table of pricing options. To the right of the table are two buttons: "+ Add Device" (with a device icon) and "+ Add Admin" (with a person icon). At the bottom, there are links for "Get Support" and "Go Back", and a "Next" button.

SELECT A PLAN	
PricingType/Name: 0+ active employees	\$0.00
Plan 1: 1-4 active employees	\$0.00
Plan 2: 5-9 active employees	\$20.00
Plan 3: 10-24 active employees	\$34.00
Plan 4: 25-49 active employees	\$50.00
Plan 5: 50-99 active employees	\$69.00
Plan 6: 100-149 active employees	\$120.00
Plan 7: 150-299 active employees	\$169.00
Plan 8: 300+ active employees	\$219.00

3 BILLING INFORMATION

Membership Sign up \$0.00/mo.

Credit Card e-Check

<input type="text"/>	<input type="text" value="United States of America"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

30-day money back guarantee. No long term contracts.

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.



4 REVIEW INFORMATION
Membership Sign up

ADMIN INFORMATION US-Pacific http://www.trackmytime.com	BILLING INFORMATION \$0.00 /mo. Card # (XXXX-XXXX-XXXX-1111) Expires: 02/2021 111111111111111111111111 US 123 grow st Shadows Creek, LA 12312 (763) 092-7911 Mark.J@gmail.com
ACCOUNT INFORMATION Plan Number: , active employees	

uAttend Terms and Conditions

The following are the terms and conditions (the "Terms and Conditions") for use of the uAttend software (the "Software") and the provision of a subscription service to be used by you for tracking and reporting employee work time, (referred to as "Services" or "uAttend Services"). The uAttend Service is owned, operated, and provided to you by ProcessingPoint ("ProcessingPoint") through the web site <http://www.trackmytime.com> (the "Site").

By completing the uAttend purchase order and agreeing to use the uAttend Service, you agree to be bound by these Terms and Conditions, including the purchase order, all payment terms, policies, practices, rules, standards and guidelines ("Policies") related to the Site under the Services, in effect from time to time (collectively, the "Agreement").

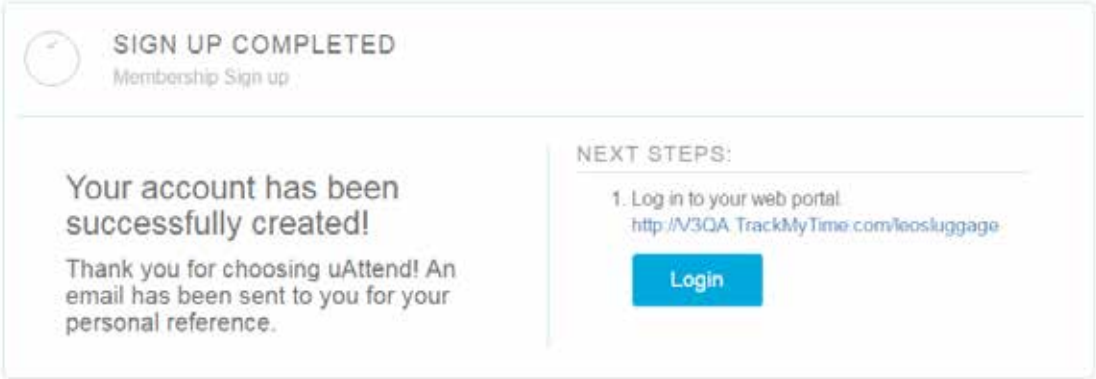
Also refer to the "Post" or "Event" subject to the system or application for the complete details of the Terms and Conditions, which are available at www.trackmytime.com.


I have read and agree to the uAttend Terms and Conditions

Get Support 24/7, money back guarantee
No long term contracts

[Go Back](#) [Create Account](#)

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.



 **SIGN UP COMPLETED**
Membership Sign up

Your account has been successfully created!

Thank you for choosing uAttend! An email has been sent to you for your personal reference.

NEXT STEPS:

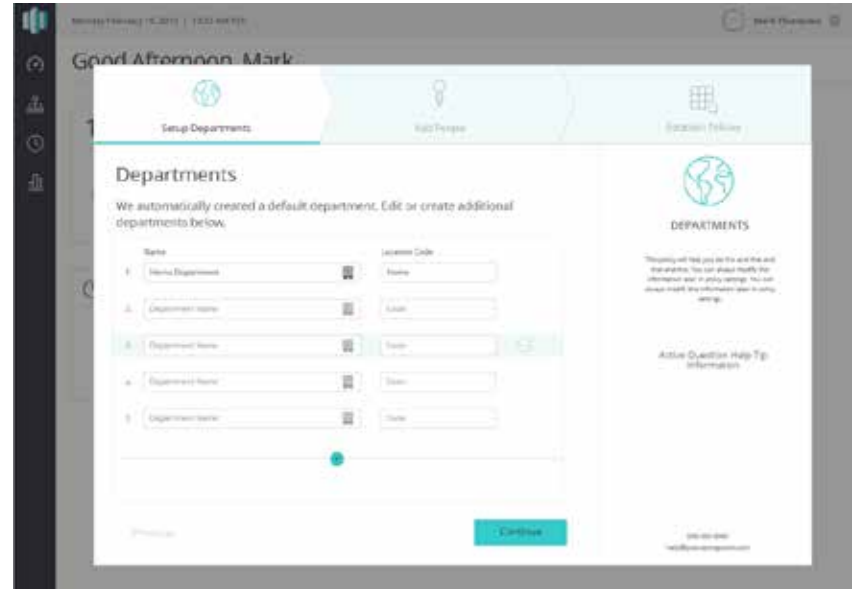
1. Log in to your web portal
<http://V3QA.TrackMyTime.com/leosuggage>

Login

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.

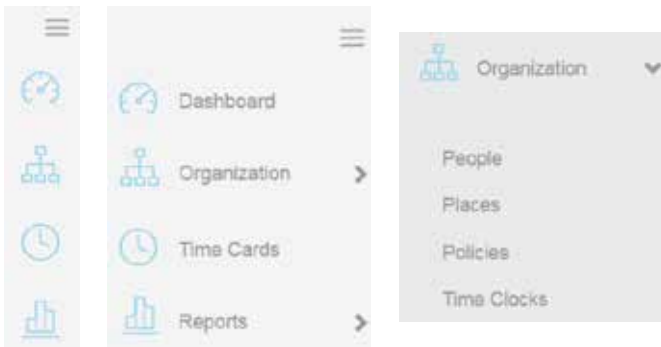
[click this to see a locked punch](#)

🕒 Total Hours 83.45 | < Current Pay Period 02/03/17 - 02/13/17 > [Time Card](#)

REGU	OT1	OVER	SIC	VAC	HOL	OTH1	OTH2
100.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00

You need a punch management policy in order to web punch! 🚫👉👈👉

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**.

Time Clock Details

<input type="text" value="Time Clock Name*"/> <small>Time Clock Name</small>	<input type="text" value="Description"/>
<input type="text" value="Device ID*"/> <small>Device ID</small>	
<input type="text" value="Time Zone*"/> <small>Select a Time Zone</small>	<input type="text" value="Status*"/> <small>Active</small>

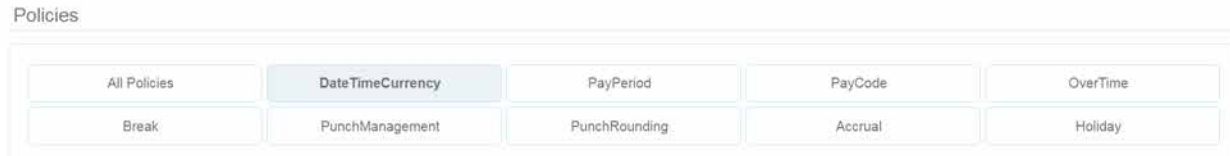
* Required

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 screenshot shows a configuration window titled "Default date tim...". The window has a search bar in the top right corner. Below the title bar is a "Details" section with the following fields:

- Policy Name***: Default Date Time Currency
- Status***: Active
- Date Format**: Month/Day/Year
- Currency Type**: U.S. Dollar
- Time Format**: 12 Hour

At the bottom left, there is a note: "* Required". At the bottom right, there are "Cancel" and "Save" buttons. On the right side of the window, there is a sidebar with the title "Date Time Currency", a grid icon, and a link labeled "Default date tim...".

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.

Details

Policy Name*
Policy Name (Required)

Status*
Active

Pay Period Type
Weekly

Effective Date*
Feb 15, 2017

Work Week Begins On
Sunday

Current Pay Period
Start Date: 02/12/2017
End Date: 02/18/2017

Next Pay Period
Start Date: 02/19/2017
End Date: 02/25/2017

* Required

Cancel Save

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**.

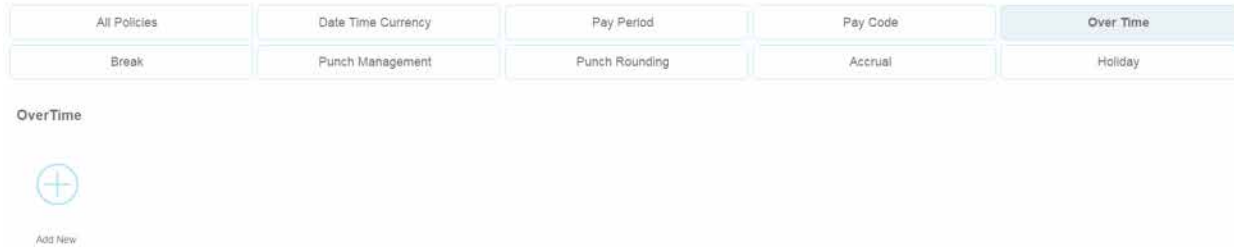
Pay Code* REG	Pay Code Description* Regular Code	⊙
Pay Code* OT1	Pay Code Description* Overtime1 Code	⊙
Pay Code* OT2	Pay Code Description* Overtime2 Code	⊙
Pay Code* HOL	Pay Code Description* Holiday Code	⊙
Pay Code* SIC	Pay Code Description* Sick Time Code	⊙
Pay Code* VAC	Pay Code Description* Vacation Code	⊙
Pay Code* OTH	Pay Code Description* Other Code	⊙

* Required

+ Add An Extra Pay Code

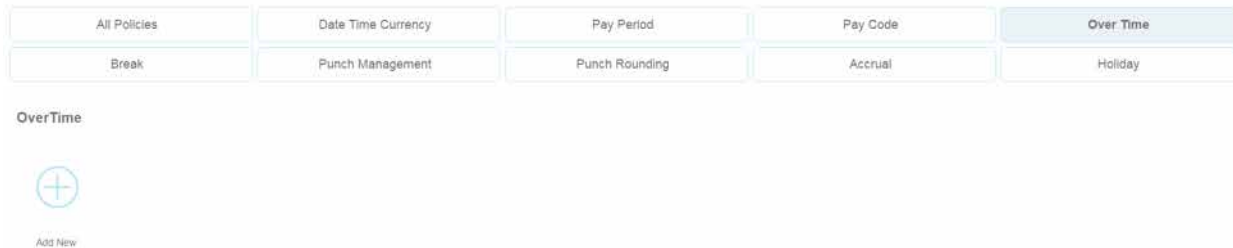
Cancel [Save](#)

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.

Details

Policy Name* Policy Name (Required)		Status* Active	
Rule Name* Rule Name	Overtime Type* Daily	Auto After Hours/minutes 08 Hrs and 00 Mins	Paycode* Select Paycode...
Modifier* 1.5	Allow Accrual* Disabled	Is Enabled* Enabled	Auto After 08 Hrs and 00 Mins

+ Add a New Accrual Rule

* Required

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

All Policies	DateTimeCurrency	PayPeriod	PayCode	OverTime
Break	PunchManagement	PunchRounding	Accrual	Holiday

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.

Details

Policy Name*
Policy Name (Required)

Status*
Active

Break Type*
Choose Break Type...

Auto After Hours/Minutes
After 03 Hrs and 00 Mins

Auto Enabled*
Disabled

Auto Recurring*
Disabled

Standard Punch Enabled*
Disabled

Standard Punch Paid Break*
Disabled

Auto Set Hours/Minutes
00 Hrs and 15 Mins

Pay Up to Hours/Minutes
00 Hrs and 10 Mins

Lockout Enabled*
Disabled

Lockout Duration Hours/Minutes
00 Hrs and 00 Mins

X Remove Row

+ Add a New Accrual Rule

* Required

Cancel Save

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

Policies

All Policies	DateTimeCurrency	PayPeriod	PayCode	OverTime
Break	PunchManagement	PunchRounding	Accrual	Holiday

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.

< Default punch m... > ✕

Policy Name*
Default Punch Management

Status*
Active

Standard Punch Permissions:

Allow Standard Punch* Yes	Allow Department Transfer* No
Max Shift Length* 14 Hrs and 0 Mins	Start of Workday* 12:00 AM
Standard Paycode* Regular Code (REG)	

Web Punch Permissions:

Allow Web Punch* No

* Required

Cancel Save

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.

The screenshot shows a web form for creating a policy. At the top, there is a text input field for "Policy Name" with a red asterisk and a placeholder "Policy Name (Required)". To its right is a dropdown menu for "Status" with "Active" selected. Below these is a section titled "Web Punch Permission" containing a dropdown menu with "Yes" selected. Underneath, there are two columns: "Available IP Addresses" and "Assigned IP Addresses". The "Available IP Addresses" column has a checkbox labeled "Use All Ip Addresses" which is checked. The "Assigned IP Addresses" column contains a button that says "+ Add An Extra Web Punch Location". At the bottom left, there is a red asterisk and the word "Required". At the bottom right, there are two buttons: "Cancel" and "Save".

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:

The dashboard is divided into two main sections. The top section displays the current time as 10:35:34 AM PST on Monday, Feb 27, 2017. It includes a 'Punch In' button and a 'Notes' field. Below this, there is a 'Welcome!' message and a 'Start your shift by punching in' instruction. The current department is listed as 'Home Department'. The bottom section shows 'Total Hours 83.45' for the 'Current Pay Period 02/03/17 - 02/13/17', with a 'Time Card' button. Below this is a table of time categories and their values:

REGU	OT1	OVER	SIC	VAC	HOL	OTH1	OTH2
100.00	40.00	40.00	40.00	40.00	40.00	40.00	40.00

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

Mobile Punch Permission

Allow Web Punch*
Yes

Available Geo Locations Use All Geo Locations Assigned Geo Locations

string	string	>
string	string	>
0		
QA 8285073	8285073 City	>
8285073 Location St	OK	
0		
QA 1136785	1136785 City	>
1136785 Location St	CA	
0		
0		

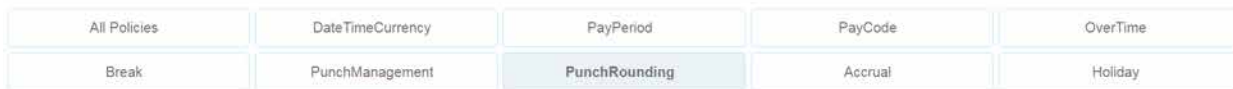
+ Add An Extra Mobile Punch Location

* Required

Cancel **Save**

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 Locations**.

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**.

Details

Policy Name*
Policy Name (Required)

Status*
Active

Punch Rounding Enabled
Punch Rounding Enabled

Rounding Interval Minutes*

Break Point Minutes*

Is Custom:
Is Custom

* Required

Cancel Save

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

All Policies	DateTimeCurrency	PayPeriod	PayCode	OverTime
Break	PunchManagement	PunchRounding	Accrual	Holiday

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.

Details

Policy Name*
Policy Name (Required)

Status*
Active

Rate*
0

Rate Frequency*
Hour

Rate Worked*
1

Start Date*
Feb 16, 2017

Is Enabled*
Is Enabled

Cap Hours*
0

Cap Amount*
0

Rollover Enabled*
Enabled

Max Rollover*
0

Reset Date
02/16

Rounding Format*
Rounding Format

Paycode
Select Paycode...

X Remove Row

+ Add a New Accrual Rule

* Required

Cancel **Save**

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



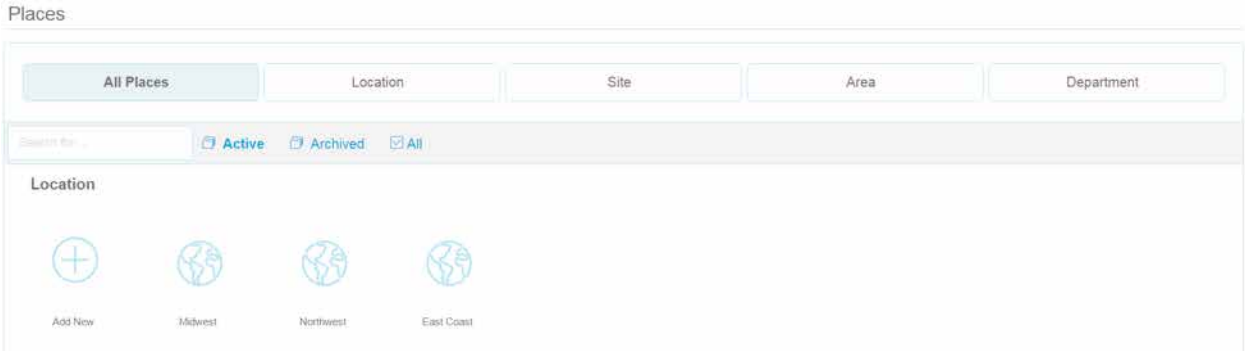
The **Holiday** tab allows you to determine holiday pay rates. Click **Add New** to start the policy creation process.

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 your 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.

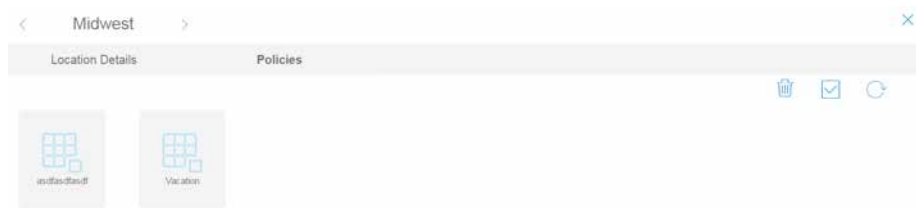
2. You may choose your **Location Code**. This can be whatever you want it to be.
3. You may choose your **Country** from the dropdown menu. In this example, we are choosing **US**.
4. You may enter your **Street Address**, **Street Address 2**, **City**, **State**, **Zip Code**, and **Phone Number**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

The screenshot shows a web form titled 'Midwest' with a 'Location Details' tab. The form contains the following fields and options:

- Name:** Midwest
- Location Code:** Location Code
- Country:** US
- Street Address:** 2588 Market St.
- Street Address 2:** Suite B.
- City:** Minneapolis
- State:** Minnesota
- Zip Code:** 55104
- Phone Number:** +1 (612) 293-4538
- Profile Image:** A placeholder image with a 'Change' button.
- Description:** Description
- Status:** Active

At the bottom right, there are 'Cancel' and 'Save' buttons.

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.

The image shows a web form for editing site details for a location named 'New York'. The form is titled 'New York' and has two tabs: 'Site Details' (selected) and 'Policies'. The form contains the following fields and controls:

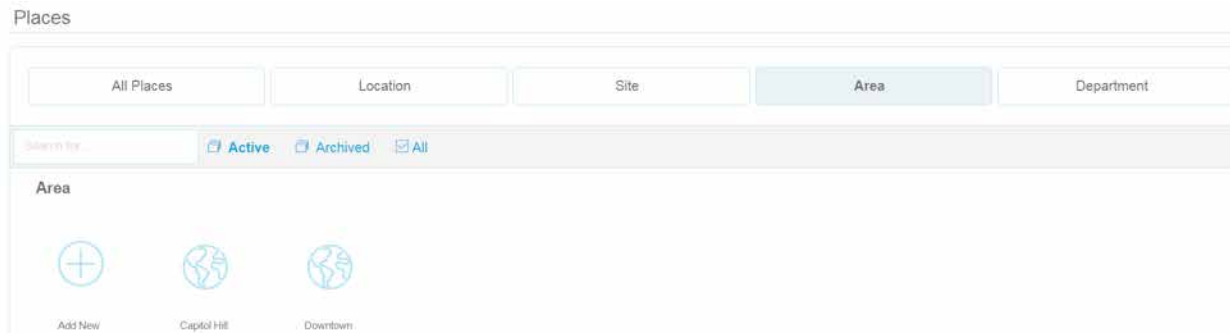
- Name:** Text input field containing 'New York'.
- Location Code:** Text input field.
- Country:** Dropdown menu with 'US' selected.
- Street Address:** Text input field.
- Street Address 2:** Text input field.
- City:** Text input field.
- State:** Dropdown menu with 'Select a State...'.
- Zip Code:** Text input field containing '10000'.
- Phone Number:** Text input field with a '+1' prefix and a 'Phone Number' label.
- Profile Image:** A circular placeholder with a diagonal line through it, and a 'Change' button next to it.
- Description:** Text area for 'Description'.
- Parent:** Dropdown menu with 'Midwest' selected.
- Status:** Dropdown menu with 'Active' selected.

At the bottom right of the form, there are 'Cancel' and 'Save' buttons.

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 screenshot shows a mobile application interface for editing an 'Area'. The title bar at the top reads 'Capitol Hill' with navigation arrows on either side and a close icon on the right. Below the title bar are two tabs: 'Area Details' (selected) and 'Policies'. The form is divided into two columns. The left column contains several input fields: 'Name*' with the value 'Capitol Hill', 'Phone Number' with the value '123-456-7890', 'Country' with a dropdown menu showing 'US', 'Street Address' with the value '1234 Main St', 'Street Address 2' with the value 'New York, NY', 'City' with the value 'NYC', and 'Zip' with the value '10001'. Below these is a 'State' dropdown menu with the value 'Select a State...' and a 'Zip Code' field with the value '10000'. At the bottom left of the form is a blue button with a plus sign and the text 'Add Photos'. The right column features a 'Profile Image' section with a circular icon containing a diagonal line and a blue 'Change' button. Below this is a large text area for 'Description'. At the bottom right of the form are two buttons: 'Cancel' and 'Save'.

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.

The screenshot shows a web form titled "Policies" with a "Department Details" tab selected. The form is organized into two columns. The left column contains fields for: Name (with a red asterisk), Location Code (with a tooltip "Location Code"), Country (set to "US"), Street Address (with a tooltip "Street Address"), Street Address 2 (with a tooltip "Street Address 2"), City (with a tooltip "City"), State (a dropdown menu set to "Select a State..."), Zip Code (with a tooltip "Zip Code"), and Phone Number (with a tooltip "Phone Number" and a "+1" icon). The right column contains fields for: Description (with a tooltip "Description"), Parent (a dropdown menu set to "Choose Parent..."), and Status (a dropdown menu set to "Active"). At the bottom right of the form are "Cancel" and "Save" buttons.

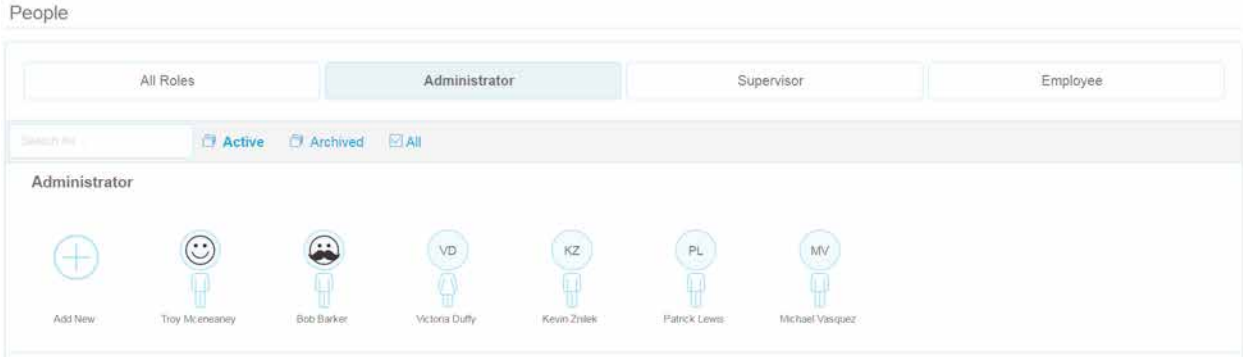
Department Transfers

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.

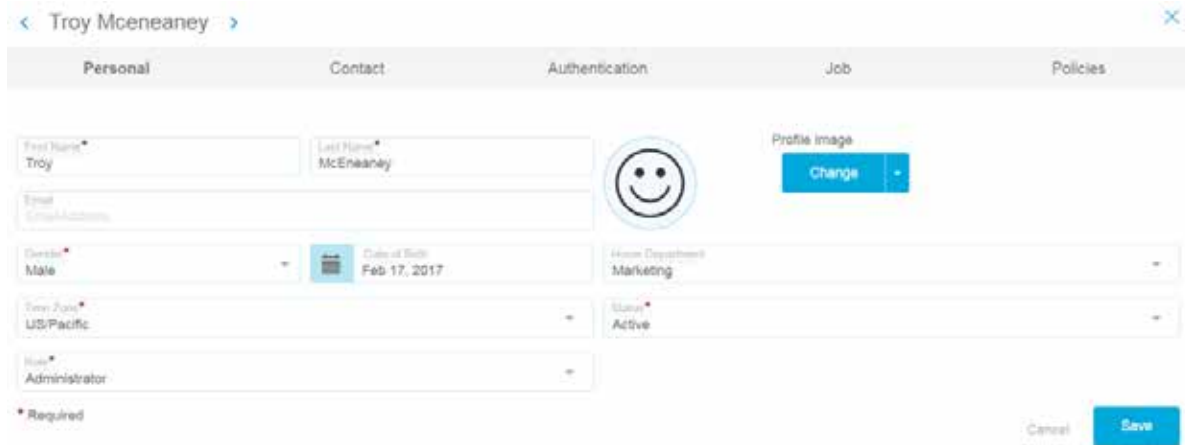


Great! You are done adding **Places** for now. The next step is to add **People** to your **Citadel** account. The **People** category is divided into three tiers, **Administrator**, **Supervisor**, and **Employee**. In this section, you will find out the difference between the three and learn how to 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.



The screenshot shows a user profile form for 'Troy McEneaney'. The form is divided into several tabs: Personal, Contact, Authentication, Job, and Policies. The 'Personal' tab is active. The form contains the following fields and options:

- First Name:** Troy
- Last Name:** McEneaney
- Profile Image:** A placeholder image of a smiley face with a 'Change' button.
- Gender:** Male (dropdown menu)
- Date of Birth:** Feb 17, 2017
- Home Department:** Marketing (dropdown menu)
- Time Zone:** US/Pacific (dropdown menu)
- Status:** Active (dropdown menu)
- Role:** Administrator (dropdown menu)

At the bottom right, there are 'Cancel' and 'Save' buttons. A legend indicates that an asterisk (*) denotes a required field.

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**.

The screenshot shows a user profile page for 'Troy Mceneaney' with a 'Contact' tab selected. The form includes the following fields:

- Country:** A dropdown menu with 'US' selected.
- Home Phone Number:** A text input field with a '+1' icon and a 'Reset Phone Number' link.
- Work Phone:** A text input field with a '+1' icon and a 'Reset Phone' link.
- Street Address:** A text input field.
- Street Address 2:** A text input field.
- City:** A text input field.
- State:** A dropdown menu with 'Select a State'.
- Zip Code:** A text input field with '720' entered.

At the bottom left, there is a '* Required' label. At the bottom right, there are 'Cancel' and 'Save' buttons.

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.

The screenshot shows the 'Authentication' tab for user 'Troy Mceneaney'. The interface includes a navigation bar with tabs for 'Personal', 'Contact', 'Authentication', 'Job', and 'Policies'. The 'Authentication' tab is active. On the left, there are two 'ID Type' dropdown menus. The first is set to 'PIN' and has an 'ID Number' field next to it. The second is set to 'Badge' and also has an 'ID Number' field. Below these is a link '+ Add An Extra ID'. On the right, there is a 'Function' dropdown menu set to 'Disabled'. Below it is a checked checkbox with the text 'This will send an email to the new administrator allowing them to create their own credentials.' Further down are three text input fields: 'Username' (containing 'tmceneaney'), 'Password', and 'Confirm Password' (with a small red asterisk indicating it is required). At the bottom right, there are 'Cancel' and 'Save' buttons.

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.

The screenshot shows the user profile page for Troy Mceneaney. The page has a navigation bar with tabs for Personal, Contact, Authentication, Job, and Policies. The Authentication tab is active. There are two main sections for ID management. The first section has a dropdown for ID Type (set to Badge) and a text input for ID Number (1234567). Below this is a link to '+ Add An Extra ID'. The second section has a dropdown for Punch In (set to Disabled) and a checked checkbox with the text 'This will send an email to the new administrator allowing them to create their own credentials.' Below this are three text input fields: Username (mceneaney), Password (masked with asterisks), and Confirm Password (masked with asterisks). At the bottom left is a '* Required' label, and at the bottom right are 'Cancel' and 'Save' buttons.

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.

The screenshot shows a user profile page for Troy Mceneaney. The 'Job' tab is selected, and the following fields are visible:

- Payroll ID:** Job 1
- Pay Rate:** \$ [input field] / hour
- Hire Date:** Feb 17, 2017
- Exempt Status:** Select Exempt Status
- SSN:** XXX-XX-4234

A legend indicates that fields with an asterisk (*) are required. The 'Save' button is highlighted in blue.

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.

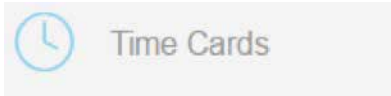
1. Add the administrator **First Name** and **Last Name**. The **Status** is set to active by default.
2. You may add a **Profile Image**.

The screenshot shows a user profile form for a 'Super Visor'. The form is divided into several sections: Personal, Contact, Authentication, Job, and Policies. The 'Personal' section is currently active and contains the following fields: First Name (Super), Last Name (Visor), Email (Email Address), Gender (Other), Date of Birth (Feb 14, 2017), Time Zone (US/Pacific), Role (Supervisor), and Status (Active). There is also a Profile Image placeholder with a 'Change' button. The form includes a 'Save' button at the bottom right and a 'Cancel' button. A legend indicates that fields with an asterisk are required.

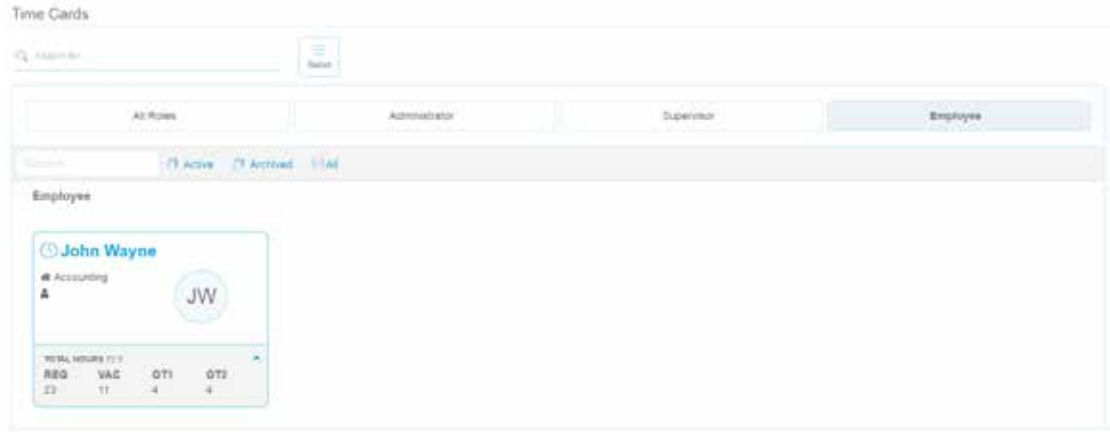
3. You may select the **Gender** from the dropdown menu.
4. You may enter the **Date of Birth**.
5. Select a **Time Zone** from the dropdown menu.
6. Select the **Role** from the dropdown menu. In this case, it is the administrator.
7. You may select the home department if applicable.

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

Mo 27 Feb	07:00:00 am ✕	04:00:00 pm	Punch	Home Department
In/Out ▾				
+ PUNCH				

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

Mo 27 Feb	07:00:00 am ✕	04:00:00 pm	Punch	Home Department
Punch In* 04:00 PM	+ Add Out Punch	Punch Type* In/Out ▾	Home Department Select a Department ▾	Notes ✔ ✕