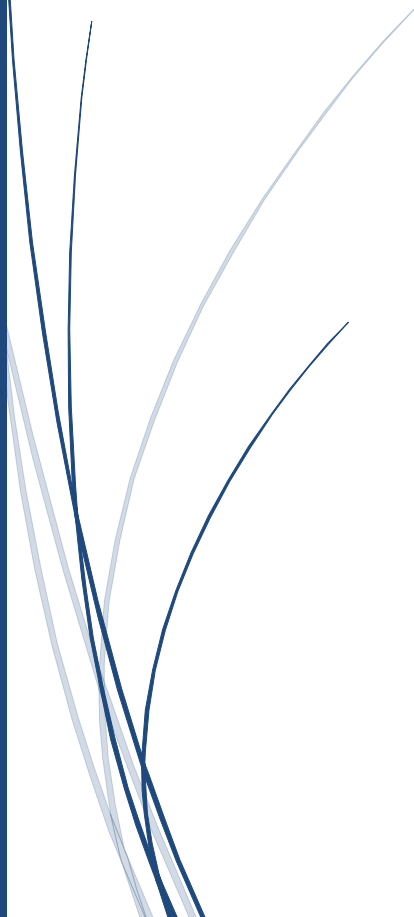


# Janitorial Manager/Chronotek Onboarding Instructions

Updated 8/22/2016



## Enabling Timekeeper Features in Janitorial Manager

1. Communicate to Chronotek that you would like your account to be added to the JM interface list. Once they provide confirmation, you may move onto step 2. Do not move onto Step 2 until they provide confirmation.
2. Login to Janitorial Manager.
3. Go to Account -> Manage Account.
4. Go to the Timekeeper tab.
5. Fill out the form.
  - a. Timekeeper System: Chronotek
  - b. Reference Number: Chronotek Account Number
6. Click Save.
  - a. An email will be sent to the company contact email address.

Log off JM and log back in again. There will now be several new menu items available.

- Account - > Timekeeper Errors
- Clients -> Chronotek Import
- Employees -> Chronotek Import

Depending on the state of JM and Chronotek accounts, you will have the following choices for setting up communications between the systems.

## Onboarding Scenario 1: JM and Chronotek users

In this scenario the user has an active account in JM and in Chronotek. This is the most difficult situation because manual steps are required to synchronize the two live datasets.

### Employee Synchronization

This is an intense task because you will need to manually add the **JM Employee External Code** to all **Chronotek Employee** records. This is required to establish a link between the datasets in each system. This task is required only during the onboarding process and will happen automatically for new employee records.

1. Login to Janitorial Manager.
2. Go to Employees -> Manage Employees.
3. Locate the **External Code** column in the grid.
4. On a new tab, login to your Chronotek account.
5. Go to List Maintenance -> Employees.
6. Change the View drop down list menu to "Show: All"
7. For each employee in the list...
  - a. Select the employee
  - b. Select the Advanced tab in the right pane
  - c. Go back to JM
  - d. Find the corresponding Employee in the JM grid

- i. If the employee is not in JM, create this employee in JM first, then proceed
  - e. Copy the corresponding Employee External Code from the JM grid
  - f. In the Chronotek Advanced pane, find the External Code 1 field
  - g. Paste the copied value into the External Code 1 field
    - i. If External Code 1 is full, use External Code 2
    - ii. If both External Code fields are full, please contact JM and Chronotek Support
  - h. Click save
8. Go back to step 7 and repeat for each employee in the Chronotek list of employees
  9. Within Chronotek, click the List Maintenance -> Employees item
  10. Click the excel icon to download an excel file containing all Chronotek Employees, save this file to your computer hard drive.
  11. Go back into JM to the Employees -> Chronotek Import page
  12. Browse and select the previously saved excel file containing Chronotek Employees
  13. Click Upload Chronotek Workbook
  14. This may take a few minutes to process
  15. Review the results
    - a. If all records uploaded successfully then the synchronization is complete
    - b. If errors occurred, perform the following steps (do not close your error window):
      - i. Open a new browser tab and log into JM
      - ii. Read each error carefully
        1. "Employee code was not properly formatted"
          - a. This should not happen – if it does contact JM and Chronotek support
        2. Janitorial Manager employee record with External Code <code> was not found for <Last Name>, <First Name>
          - a. An invalid JM Employee External Code was saved on the Chronotek Employee record, this is likely a data entry error.
          - b. Go back into Chronotek and fix the error for the specified employee
        3. If a different error occurred please contact JM support immediately. This happened because an unexpected value was received Chronotek and we need to investigate to address the problem.
      - iii. Once errors are corrected, go back to Step 9 and attempt the process again.

### Where should I create new employee records?

Janitorial Manager is the system of record for your employee information. After synchronization is complete, you will no longer need to add to employees Chronotek. Add the new employee to Janitorial Manager and we will synchronize this employee to Chronotek for you.

### What about employee changes that occur after the synchronization is complete?

Janitorial Manager will send new employees, updated employees and terminated employees to Chronotek every night for your account. However, there may be times when you need to edit Chronotek specific features of the employee record. Those features must be handled outside of Janitorial Manager.

## Client Synchronization

This is an intense task because you will need to manually add the **JM Client External Code** to all **Chronotek Job** records. This is required to establish a link between the datasets in each system. This task is required only during the onboarding process.

1. Login to Janitorial Manager.
2. Go to Clients -> Manage Clients.
3. Locate the **External Code** column in the grid.
4. On a new tab, login to your Chronotek account.
5. Go to List Maintenance -> Jobs.
6. Change the View drop down list menu to "Show All"
7. For each job in the list...
  - a. Select the job
  - b. Select the Advanced tab in the right pane
  - c. Go back to JM
  - d. Find the corresponding Client in the JM grid
    - i. If the client is not in JM, create this client in JM first, then proceed
  - e. Copy the corresponding Client External Code from the JM grid
  - f. In the Chronotek Advanced pane, find the External Code 1 field
  - g. Paste the copied value into the External Code 1 field
    - i. If External Code 1 is full, use External Code 2
    - ii. If External Code 2 is full, use External Code 3
    - iii. If all External Code fields are full, please contact JM and Chronotek Support
  - h. Click save
8. Go back to step 7 and repeat for each job in the Chronotek list of jobs
9. Within Chronotek, click the List Maintenance -> Jobs item
10. Click the excel icon to download an excel file containing all Chronotek Jobs, save this file to your computer hard drive.
11. Go back into JM to the Clients -> Chronotek Import page
12. Browse and select the previously saved excel file containing Chronotek Jobs
13. Click Upload Chronotek Workbook
14. This may take a few minutes to process
15. Review the results
  - a. If all records uploaded successfully then the synchronization is complete
  - b. If errors occurred, perform the following steps (do not close your error window):
    - i. Open a new browser tab and log into JM
    - ii. Read each error carefully
      1. Janitorial Manager client record with External Code <code> was not found for <Job Name>
        - a. An invalid JM Client External Code was saved on the Chronotek Job record, this is likely a data entry error.
        - b. Go back into Chronotek and fix the error for the specified client

2. If a different error occurred please contact JM support immediately.  
This happened because an unexpected value was received Chronotek and we need to investigate to address the problem.
- iii. Once errors are corrected, go back to Step 9 and attempt the process again.

### Where should I create new client records?

Janitorial Manager is the system of record for your client information. After synchronization is complete, you will no longer need to add to jobs into Chronotek. Add the new client to Janitorial Manager and we will synchronize this client to Chronotek for you.

### What about client changes that occur after the synchronization is complete?

Janitorial Manager will send new clients, updated clients and terminated clients to Chronotek every night for your account. However, there may be times when you need to edit Chronotek specific features of the job record. Those features must be handled outside of Janitorial Manager.

## Onboarding Scenario 2: Exists in Chronotek, new to JM

It is important to wait to create employee and client records inside of JM. If not this process will create duplicate records.

Inform Chronotek that you'd like to participate in the JM interface.

### Employee Import from Chronotek

1. Login to Chronotek
2. Go to List Maintenance -> Employees (Make sure "show: All" is selected)
3. Click the excel icon to download employee list to your computer hard drive
4. Log into Janitorial Manager
5. Go to Employees -> Chronotek Import
6. Click browse and select the employee file previously saved
7. Click Upload Chronotek Workbook
8. This may take a few minutes to complete
9. If an error occurs please contact JM support. This is happening likely because an unexpected value was received and we need to adjust program logic to read appropriately.
10. Once complete, you'll need to go into JM and fill in required fields that were not provided by Chronotek.
  - a. Social security number
  - b. Address and contact information
  - c. Job classification
  - d. Hourly wage (if not saved in Chronotek)

### Client Import from Chronotek

1. Login to Chronotek
2. Go to List Maintenance -> Jobs
3. Click the excel icon to download job list to your computer hard drive

4. Log into Janitorial Manager
5. Go to Clients -> Chronotek Import
6. Click browse and select the job file previously saved
7. Click Upload Chronotek Workbook
8. This may take a few minutes to complete
9. If an error occurs please contact JM support. This is happening likely because an unexpected value was received and we need to adjust program logic to read appropriately.
10. Once complete, you'll need to go into JM and fill in required fields that were not provided by Chronotek.
  - a. Address and contact information
  - b. Monthly rate information

### **Onboarding Scenario 3: Existing JM, new to Chronotek**

First, contact Chronotek and setup your account. Inform them that you'd like to participate in the JM interface. Once they have confirmed your participation you may go into Janitorial Manager and enable the timekeeping features by using the procedures listed on Page 1.

Chronotek will receive your employees and clients out of JM within a few business days. There may be additional setup procedures within Chronotek to begin using their system. If you do not see your employee and job lists within Chronotek within a few days, please contact JM support.

### **Reviewing Errors**

Chronotek sends time card data every morning containing recent time card details. The interface works only after client and employee synchronization is completed. If the synchronization contains errors, or is not 100% complete, errors may be created by the time card interface. You should check the timekeeper error log at least weekly to make sure all data is coming over successfully.

To review errors, go to Account -> Timekeeper Errors.