

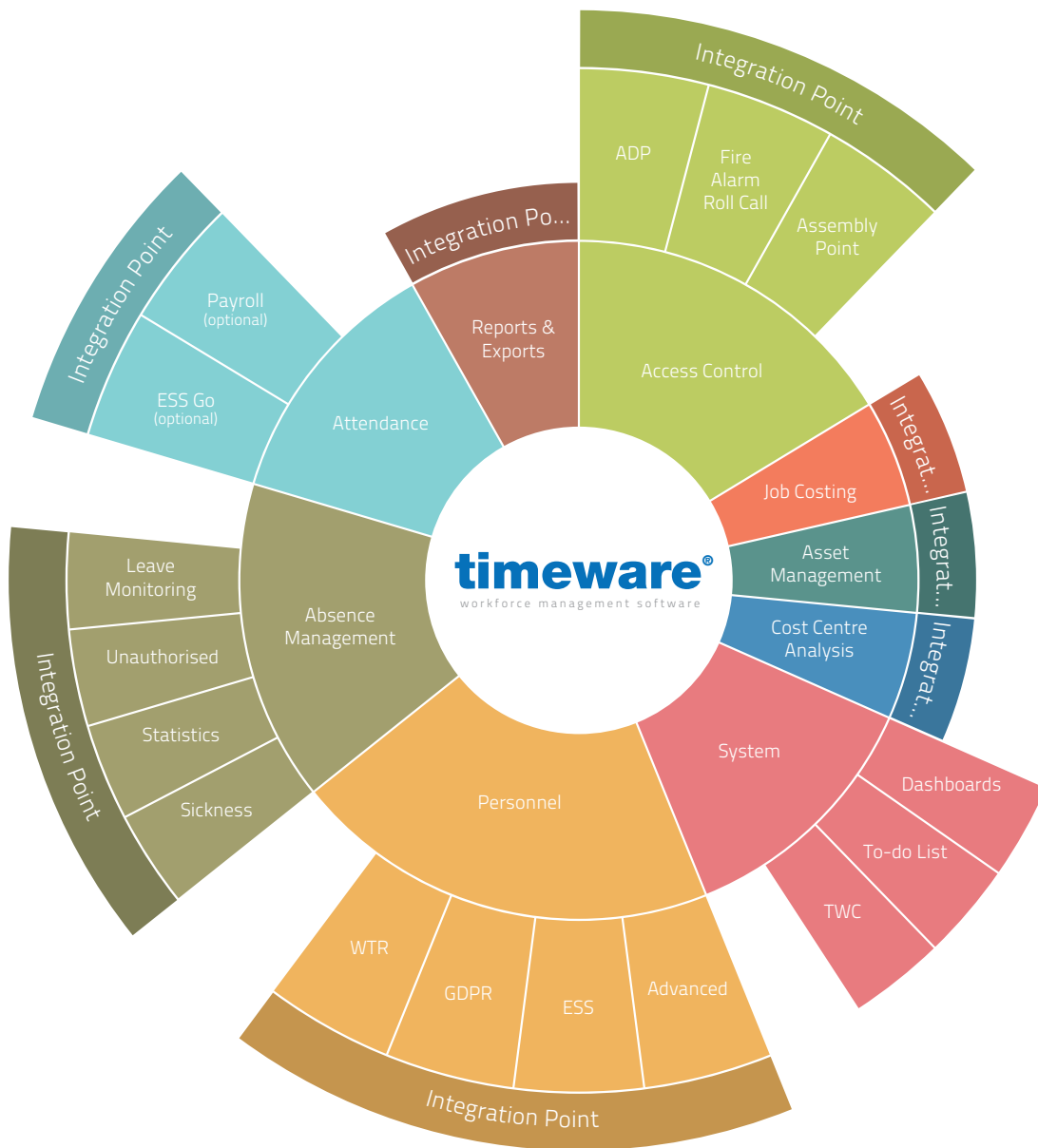


# timeware®

workforce management software

Pre-Installation notes

Company: \_\_\_\_\_



For more information about timeware<sup>®</sup> products, version updates, datasheets and reports, please refer to the timeware<sup>®</sup> community website:

[www.timeware.org](http://www.timeware.org)

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NMD<sup>3</sup> Ltd

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[www.timeware.org](http://www.timeware.org)  
+44 (0)1706 659368

## Introduction

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The following pages are designed to provide the timeware<sup>®</sup> technicians with information about the customer's key system requirements. Please provide as much detail as possible.

Many thanks

*Simon Birchall*

Simon Birchall

Managing Director timeware<sup>®</sup> (UK) Ltd

3 Fieldhouse Road  
Rochdale  
Lancashire  
OL12 0AD

## Software Installation

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### 1. timeware<sup>®</sup> Software: Server



#### Reminders...

- What is the name and IP information of the server?

### 2. timeware<sup>®</sup> Software: Application



#### Reminders...

- What drive of the server will the timeware<sup>®</sup> software will be installed on?
- What version of timeware<sup>®</sup> software are we going to install?
- How many timeware<sup>®</sup> software clients will need to be installed?

### 3. timeware<sup>®</sup> Software: Users



#### Reminders...

- How many users will require access to the timeware<sup>®</sup> software?
  - Username
  - Permissions
  - Email address

### 4. IIS: Server



#### Reminders...

- What is the name and IP information of the server?

## Software Installation

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### 5. IIS: Application



#### Reminders...

- Will the timeware<sup>®</sup> Web Client be set up?
- Will the timeware<sup>®</sup> Employee Self Service be set up?
- What drive of the server will the timeware<sup>®</sup> web features be installed on?
- What port will the timeware<sup>®</sup> web features will be held on?

### 6. SQL: Server



#### Reminders...

- What is the name and IP information of the server?

### 7. SQL: Application



#### Reminders...

- What drive of the server will the SQL software will be installed on?
- What version of SQL are we going to install?

### 8. SQL: Database



#### Reminders...

- What drive of the server will the SQL database be held on?

## Software Installation

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### 9. Backup: Server



#### Reminders...

- What is the name and IP information of the server?
- Will the timeware<sup>®</sup> backup always replace the existing or will it be separated into a daily individual folder?
- What times will the backup run?

## Bio Enrolment

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#### Reminders...

- How many employees require enrolment?
- What are the various shift patterns that are worked?
- What languages of staff are employed?  
(English, Hungarian, Polish, Ukrainian, Romanian, Urdu, Punjabi, Latvian, Armenian language cards are available, this lists all required information for the reason of enrolment).
- Where will the enrolment take place?
- Are you able to provide an enrolment schedule?  
(This is usually a list of names that will attend at different points in the day, possibly departmental order)?

## Hardware Installation

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### Reminders...

- Discuss the various hardware that will be installed:
  - Type of Hardware
  - Description
  - IP Address
  - Subnet Mask
  - Gateway
- Confirmed location of fused spurs?
- Confirmed location of network ports?
- Will people use a 3rd party proximity card or fob with the timeware<sup>®</sup> equipment?

## Project Build

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### 10. timeware<sup>®</sup> Windows client: Personnel



### Reminders...

- Who is the contact for the day to day running of the Personnel module?
- Do we require to import personnel data from another system in to timeware<sup>®</sup> and if so, identify and document the data type and format?
- Personnel Subheadings reminder:
  - Personal e.g. Date of birth, contact details, marital status etc.
  - Employment
  - Appraisal
  - Vehicle
  - Training
  - Qualifications
  - Education
  - Disciplinary
  - Accident
  - Documents
  - Health



### Reminders...

- Any user defined fields to be imported that are not listed above.
- Is an absence entitlement policy required?
- Is a period schedule required?
- Is a terminal policy required?
- Is an email policy required?
- Is a remuneration policy required?
- Is a payroll number required and if so, does the payroll number need to be unique?
- Can you save an employee with the system "Newly added" status?
- Set a default person status, email policy, remuneration policy
- How many numbers of employees?
- Discuss:
  - Employment record
  - Appraisal
  - Vehicle
  - Training records
  - Qualifications
  - Education
  - Disciplinary records
  - Accident
  - Documents
  - Health
  - GDPR
  - Mobile workers
  - Employee self-service (ESS)
  - Working time regulation (WTR)
  - Groupings
  - Specify the ten main groupings:

## 11. timeware® Windows client: Absence Management



### Reminders...

- Will you be using timeware® to monitor people's Absence Management?
- Who is the contact for the day to day running of the timeware® absence management?
- Do you wish to use the Bradford factor? If yes: Which categories do you wish to report on? · What threshold should display an amber warning? · What threshold should display a red warning?
- Entitlement Information:
  - Do you wish to display absence entitlement information? If yes, which categories do you wish to display information for? Do you wish to stop a booking if there is not enough entitlement remaining? If yes, which categories should this be active for?





### Reminders...

- Tactical Absence:

Do you wish to display Tactical absence information? If yes: · Do you wish to display declined absences? Do you wish to report on Bank Holiday abuse? If yes, which categories should be included for abuse checks? · Do you wish to check for events surrounding an absence? These events are stored in a spreadsheet. If yes, which categories should be included when checking? · Do you wish to check for absences surrounding the employee's birthday? If yes, which categories should be included when checking?

- Rolling Absence

Do you wish to display absence statistics in a rolling period? If yes, how long is this period, in months? What categories should be included in this rolling period?

- Entitlement Forecast

Do you wish to display information regarding an employee's entitlement forecast? (This is used to alert the user if the employee has a certain amount of absence entitlement remaining at certain points in the entitlement year. If yes: What categories should be displayed? How many months through the entitlement year should the first check be made? How much entitlement remaining, as a percentage, would trigger an amber alert? How much would trigger a red alert?

- How many months through the entitlement year should the second check be made?
- How much entitlement remaining, as a percentage, would trigger an amber alert? How much would trigger a red alert?
- When booking an absence would you like to display a warning if the individual has failed to book adequate holidays before the year end?
- When an absence booking is finalised, would you like the person requesting the absence to receive an email notification?
- Absence categories
- Absence reasons
- Absence category entitlement
- Absence management form event
- RTW procedure

## 12. timeware® Windows client: Attendance



### Reminders...

- Will you be using timeware® to monitor people's attendance?
- Who will be responsible for supplying the work patterns and overtime rule information to the timeware® technician?
- Discuss daily and period schedules plus overtime and any "special working" rules
- Will users like a reminder on their agenda showing employees that are currently missing from work?
- Will users like a reminder on their agenda showing employees that were late for work?

### 13. timeware<sup>®</sup> Windows client: Access Control



#### Reminders...

- Will you be using timeware<sup>®</sup> to control people's access?
- Who will be responsible for supplying the access pattern information to the timeware<sup>®</sup> technician?
- Will people use a 3rd party proximity card or fob with timeware<sup>®</sup> access?
- If yes, what is the 3rd party system name and reader type?
- Access patterns
- Access free zones

### 14. timeware<sup>®</sup> Windows client: Job Costing



#### Reminders...

- Will you be using timeware<sup>®</sup> to monitor jobs and production processes?
- Who will be responsible for supplying the job and production process information to the timeware<sup>®</sup> technician?
- Will you be importing job/operation code information from a 3rd party system?
- If yes, what is the 3rd party system name and file format?
- Jobs/Operations

### 15. timeware<sup>®</sup> Windows client: Cost Centre Analysis



#### Reminders...

- Will you be using timeware<sup>®</sup> to monitor cost centre analysis?
- Who will be responsible for supplying the cost centre analysis process information to the timeware<sup>®</sup> technician?
- Will you be importing cost centre data from a 3rd party system?
- If yes, what is the 3rd party system name and file format?
- Different cost centres
- Different rates of pay per cost centres

## 16. timeware<sup>®</sup> Windows client: Fire Alarm Roll Call



### Reminders...

- Will you be using the timeware<sup>®</sup> fire alarm roll-call link?
- If yes, which company supplies the fire monitoring system?
- Who will be the point of contact for any fire alarm queries?
- Email addresses
- Printers

## 17. timeware<sup>®</sup> Windows client: Reports/ Exports



### Reminders...

- Examples of reports
- Examples of exports
- Template examples

## 18. timeware<sup>®</sup> Windows client: To-Do List



### Reminders...

- Personnel anomalies
- Absences anomalies
- Attendance anomalies

## 19. timeware<sup>®</sup> Windows client: Dashboards



### Reminders...

- Examples of dashboards

## 20. timeware® Windows client: Payroll Integration



### Reminders...

- Will you be using the timeware® to payroll interface?
- If yes, please specify the payroll name and version: 24.2 Who will be the point of contact when configuring the Payroll interface?
- When you create a new starter in payroll, would you like them to be automatically created in timeware® HR? Yes / No or When you create a new starter in timeware® HR, would you like them to be automatically created in payroll? Yes / No
- How frequent is payroll?
- Details of payroll package
- Point of contact API Integration/ CSV

## 21. Additional Features



### Reminders...

- Discuss:
  - Assembly point
  - ESS Go
  - TWC
  - ESS

## Project Commissioning



### Reminders...

- Location
  - Workspace for technician to use
- Contacts
  - Project lead
  - HR
  - IT
  - Payroll
  - Security
- Equipment
  - Workstation
- Server Access
  - IT availability

## User Training

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### Reminders...

- Location
  - Onsite training/Remote training
  - Where will the training be held?
  - Training facilities (TV/Projector Software access)
- Type of Training
  - Operator/Line manager training
  - What modules will be covered in the training?
  - Who will be attending the training?
- Training Plan
  - What date will the training be held?
  - What time will the training be held?

## Post Installation Meeting

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### Reminders...

- Location & Contacts
- System
  - Are there any problems with the system?
  - Are there any changes to the system that you require?
- Installation
  - Are you happy with how the installation went?
  - Do you recommend that we change any part of the way we handle installations?
- Team
  - Discuss the Team that handled the installation?





