timeware®
workforce management solutions
Community

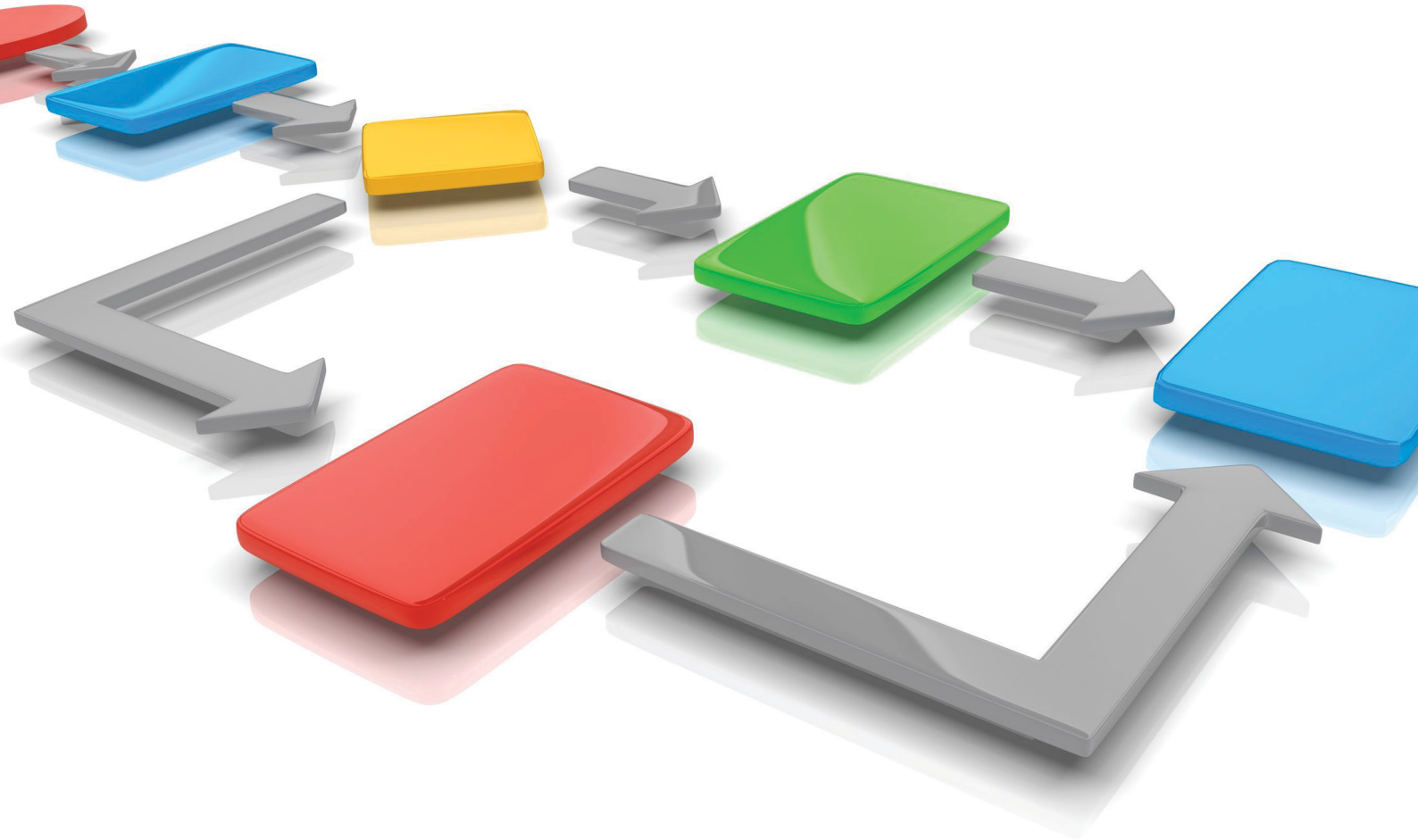
Pre-installation document

Sales order no.: .....

Company: .....

Contact: .....

Postcode: ..... Date: .....



Document t2-0501: revision 8.0

Copyright NMD³ Ltd

www.timeware.org
+44 (0)1706 659368

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

www.timeware.org

We acknowledge the intellectual property rights of third parties, trade marks and brand names used within this document.

NMD³ Ltd

www.timeware.org
+44 (0)1706 659368

Contents:

1. System Layout / IT Information

2. timeware® Windows client
3. Personnel
4. Absence Management
5. Attendance
6. Access Control
7. Job Costing
8. Cost Centre Analysis
9. Fire Alarm Roll-Call
10. Assembly Points
11. ADP (Attendance Display Panel)
12. Reports and Exports
13. Lone Worker
14. Dashboards

15. TWC (timeware® web client)
16. Absence Management
17. Attendance
18. ADP (Attendance Display Panel)

19. ESS (Employee Self Service)
20. Absence Management
21. Attendance
22. Job Costing
23. Cost Centre Analysis

General
24. Payroll Integration
25. Groupings
26. Users
27. Training
28. Customisation

www.timeware.org
+44 (0)1706 659368

Introduction

The following pages provide timeware® with information that is imperative to the correct configuration of a timeware® workforce management system. Please supply as much detail as possible.

Many thanks

Simon Birchall

Simon Birchall
Managing Director timeware® (UK) Ltd

3 Fieldhouse Road
Rochdale
Lancashire
OL12 0AD

Project manager: .....

Project field technician: .....

Pre-installation meeting:

Date: .... day(s)

Project build of customer's policies:

Date: .... day(s)

Completion of any special projects:

Date: .... day(s)

Delivery of timeware hardware to customer's site.

Date: .....

Installation

Hardware/Software ..... date

Policy commissioning ..... date

Date: .....

Training at customer's site ..... day(s)

Date: .....

Date: .....

Date: .....

Follow-up calls ..... day(s)

Date: .....

Post-installation meeting at customer's site ..... day(s)

Date: .....

Customer care calls one call/month

Date of completion ..... date

1. System Layout / IT Information

1.1 Who will be the customers' IT representative for the timeware® project?

Name: .....

Contact Number: .....

Email: .....

1.2 Where is the Server located? .....

1.3 Is the server on site? ..... If no where is the server? .....

1.4 What is the Server operating system? .....

1.5 What version of SQL will timeware® be using? ..... (Mandatory 2005 or higher)

1.6 Check if the customer is using v8 terminals or below, clearly state that they are not compatible with timeware 2018 and will require replacement new hardware.

1.7 What service provider with static IP will timeware® be using for GPRS/3G connections? .....

1.8 What is the hardwired network speed? .....

1.9 Required number of timeware® PC clients? .....

1.10 Clearly state that timeware® hardware ***must*** communicate through the network and not via RS232.

1.11 Clearly state that timeware® does not support a server using multiple network cards.

1.12 Is the company converting from an earlier version of timeware®? **Yes / No**

1.12.1 If yes, please state the package and version number? .....

1.13 Clearly state that timeware® requires POP3 and SMTP support for email notifications.

1.14 Clearly state that all hardware requires a static IP address.

1.15 If it's an existing customer ask them if they are using the Pip or would they like to start using the ESS and TWC (If no skip question 1.16 and 1.17)

1.16 Clearly state that the ESS/TWC requires .NET Framework 4.6.2 and ASP.NET installed on the server, and a full reboot of the server is requires before installation.

1.17 Do you currently use the IIS for any other application or website, If So notify the customer they will need to Install the ESS and TWC. Notify them it's there IT responsibility to get the ESS and TWC working.

1.18 Check if the customer is using biometric terminals, if so which field will be used for the leave date (We need this to clear down the biometric data after an employee has left) .....

1.19 Where will timeware® be backed up to? .....

2. timeware® Windows client:

3. timeware® Windows client: Personnel

3.1 Who is the contact for the day to day running of the Personnel module?

Name: .....

Contact Number: .....

Email: .....

3.2 Discuss if the customer wishes to import personnel data from another system into timeware and if so, identify and document the data type and format.

.....

.....

3.3 Personnel sub-headings

Personal

eg. Date of birth, contact details, marital status etc.

Job specification

Appraisal

Vehicle

Training

Qualifications

Education

Disciplinary

Accidents

Documents

Health

Any user defined fields to be imported that are not listed above.

3. timeware® Windows client: Personnel

3.4 Is absence entitlement policy required?

3.5 Is period schedule required?

3.6 Is terminal policy required?

3.7 Is email policy required?

3.8 Is remuneration policy required?

3.9 Is payroll number required?

3.10 Does payroll number need to be unique?

3.10.1 Required for link to payroll

3.11 Can you save employee with the system “Newly added” status?

3.12 Set a default person status? If yes, which status?

3.13 Set a default email policy? If yes, which policy?

3.14 Set a default remuneration policy? If yes, which policy?

4. timeware® Windows client: Absence Management

4.1 Who will be the contact for timeware® absence management?

Name: .....

Contact Number: .....

Email: .....

4.2 Bradford Factor

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?

4.3 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?

4.4 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?

4.5 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?

4. timeware® Windows client: Absence Management

4.6 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?

  .....

4.7 When booking an absence would you like to display a warning if the individual has failed to book adequate holidays before the year end?
Yes / No / Unsure

4.8 When an absence booking is finalised, would you like the person requesting the absence to receive an email notification?

Yes / No / Unsure

4.9 Absence categories

4.10 Absence reasons

4.11 Absence category entitlement

4.12 Absence management form event

5. timeware® Windows client: Attendance

5.1 Will you be using timeware® to monitor peoples attendance? **Yes / No**

5.2 Who will be responsible for supplying the work patterns and overtime rule information to the timeware® technician?

Name: .....

Contact Number: .....

Email: .....

5.3 Discuss daily and period schedules plus overtime and any “special working” rules

5.4 Will users like a reminder on their agenda showing employees that are currently missing from work? **Yes / No**

5.5 Will users like a reminder on their agenda showing employees that were late for work? **Yes / No**

5.6 Should employees receive an email notification if they have an unauthorised absence? **Yes / No**

5.7 Should employees receive an email notification if they breach their core time rules? **Yes / No**

5. timeware® Windows client: Attendance

5.8 Will people use a 3rd party prox card or fob with the timeware® attendance terminal? **Yes / No**

5.8.1 If yes, what is the 3rd party system name and reader type?

5.9 Please state the number of attendance terminals:

5.10 Describe the attendance terminal configuration:

No.	Name	Location	Terminal Type	Reader type
1001				
1002				
1003				
1004				
1005				
1006				
1007				
1008				
1009				
1010				
1011				
1012				

Attendance terminals in the range 1001 - 1999

Terminal type key:

OT = office touchscreen

O = office

I = industrial

Reader type key:

B = biometric P = proximity

K = keypad M = magstripe

N = PIN

6. timeware® Windows client: Access Control

6.1 Will you be using timeware® to control people's access? **Yes / No**

6.2 Who will be responsible for supplying the access pattern information to the timeware® technician?

Name: .....

Contact Number: .....

Email: .....

6. timeware® Windows client: Access Control

6.3 Will people use a 3rd party prox card or fob with timeware® access? **Yes / No**

6.3.1 If yes, what is the 3rd party system name and reader type?

6.4 Describe the access terminal configuration:

No.	Name	Location	Type	Reader Type	No. of readers	PTE
2001						
2002						
2003						
2004						
2005						
2006						
2007						
2008						
2009						
2010						
2011						
2012						

Access terminals in the range 2001 - 2999

Type key:

D = door

B = barrier

T = turnstile

Reader type key:

B = biometric

P = proximity

K = keypad

M = magstripe

N = PIN

t9-0380
Biometric Reader

t9-0240
Proximity Reader

7. timeware® Windows client: Job Costing

7.1 Will you be using timeware® to monitor jobs and production processes?
Yes / No

7.2 Who will be responsible for supplying the job and production process information to the timeware® technician?

Name: .....

Contact Number: .....

Email: .....

7.3 Will you be importing job/operation code information from a 3rd party system? **Yes / No**

7.3.1 If yes, what is the 3rd party system name and file format?.....

7. timeware® Windows client: Job Costing

7.4 Describe the job costing terminal configuration:

No.	Name	Location	Type
3001			
3002			
3003			
3004			
3005			
3006			
3007			
3008			
3009			
3010			
3011			
3012			

Job costing terminals in the range 3001 - 3999

Type key:

K = keypad entry

B = barcode entry

If barcode is used, state format:

8. timeware® Windows client: Cost Centre Analysis

8.1 Will you be using timeware® to monitor cost centre analysis?

Yes / No

8.2 Who will be responsible for supplying the cost centre analysis process information to the timeware® technician?

Name: .....

Contact Number: .....

Email: .....

8.3 Will you be importing cost centre data from a 3rd party system?
Yes / No

8.3.1 If yes, what is the 3rd party system name and file format?.....

9. timeware® Windows client: Fire Alarm Roll-Call

9.1 Will you be using the timeware® fire alarm roll-call link?

Yes / No / Unsure

9.1.1 If yes, which company supplies the fire monitoring system?

9.2 Who will be the point of contact for any fire alarm queries?

Name: .....

Contact Number: .....

Email: .....

9.3 Describe the fire alarm detection configuration:

No.	Name	Location
4001		
4002		
4003		
4004		

Fire alarm detection terminals in the range 4001 - 4999

9.4 When the fire alarm is detected, how would you prefer the notification?

Email / Report / Both

10. timeware® Windows client: Assembly Points

11. timeware® Windows client: ADP (Attendance Display Panel)

12. timeware® Windows client: Reports and Exports

12.1 Please outline any special reporting and exporting requirements that you may have. If possible, please include examples of the reports - these can be provided in formats such as Excel, Word or hand-drawn sketches.

13. timeware® Windows client: Lone Worker

14. timeware® Windows client: Dashboards

15. TWC (timeware® web client):

16. TWC (timeware® web client): Absence Management

17. TWC (timeware® web client): Attendance

18. TWC (timeware® web client): ADP (Attendance Display Panel)

19. ESS (Employee Self Service):

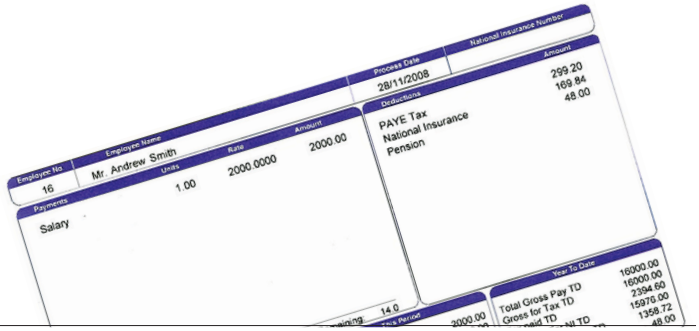
20. ESS (Employee Self Service): Absence Management

21. ESS (Employee Self Service): Attendance

22. ESS (Employee Self Service): Job Costing

23. ESS (Employee Self Service): Cost Centre Analysis

24. General: Payroll Integration



24.1 Will you be using the timeware® to payroll interface?
Yes / No / Unsure

24.1.1 If yes, please specify the payroll name and version:

24.2 Who will be the point of contact when configuring the Payroll interface?

Name: .....

Contact Number: .....

Email: .....

24.3 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**

24.4 Please indicate frequency of payroll:

25. General: Groupings

25.1 Specify the ten main groupings:

1 .....

2 .....

3 .....

4 .....

5 .....

6 .....

7 .....

8 .....

9 .....

10 .....

25.2 Discuss if the customer can supply the grouping elements for loading during project build stage. Please confirm the file format.

26. General: Users

26.1 Please identify the names and type of the users of the timeware® system:

1 .....

2 .....

3 .....

4 .....

5 .....

6 .....

7 .....

8 .....

9 .....

10 .....

timeware® Certified USER

timeware® Certified ADMINISTRATOR

27. General: Training

Please can we request that the people being trained are not disturbed during the training session

27.1 Is the timeware® trainer required to bring a projector? **Yes / No**

27.2 Date and time of session 1

27.3 Date and time of session 2

27.4 Date and time of session 3

Course	Session 1	Session 2	Session 3
tw15/op/gen001 timeware® 2018 system overview			
tw15/op/gen051 preparing your timeware® 2018 system			
tw15/op/per001 an introduction to timeware® 2018 personnel			
tw15/op/abs001 an introduction to timeware® 2018 absence management			
tw15/op/att001 an introduction to timeware® 2018 attendance			
tw15/op/job001 an introduction to timeware® 2018 job costing			
tw15/op/cos001 an introduction to timeware® 2018 cost centre analysis			
tw15/op/acc001 an introduction to timeware® 2018 access			
tw15/op/rep001 an introduction to timeware® 2018 reports			
tw15/op/fir001 an introduction to timeware® 2018 fire alarm roll call			
tw15/op/ess001 an introduction to timeware® 2018 ESS			
tw15/op/twc001 an introduction to timeware® 2018 TWC			
Exporting to Excel			

timeware Certified USER

timeware Certified ADMINISTRATOR

27. General: Training

27.5 Session 1 Location:

Session 1 Date:

Session 1 Trainer:

Course	Start	Finish	Duration

27.6 Please list the names of all the users to be trained:

Names	

timeware Certified USER

timeware Certified ADMINISTRATOR

27. General: Training

27.7 Session 2 Location:

Session 2 Date:

Session 2 Trainer:

Course	Start	Finish	Duration

27.8 Please list the names of all the users to be trained:

Names	

timeware Certified USER

timeware Certified ADMINISTRATOR

27. General: Training

17.9 Session 3 Location: .....

Session 3 Date: .....

Session 3 Trainer: .....

Course	Start	Finish	Duration

17.10 Please list the names of all the users to be trained:

Names	

28. General: Customisation