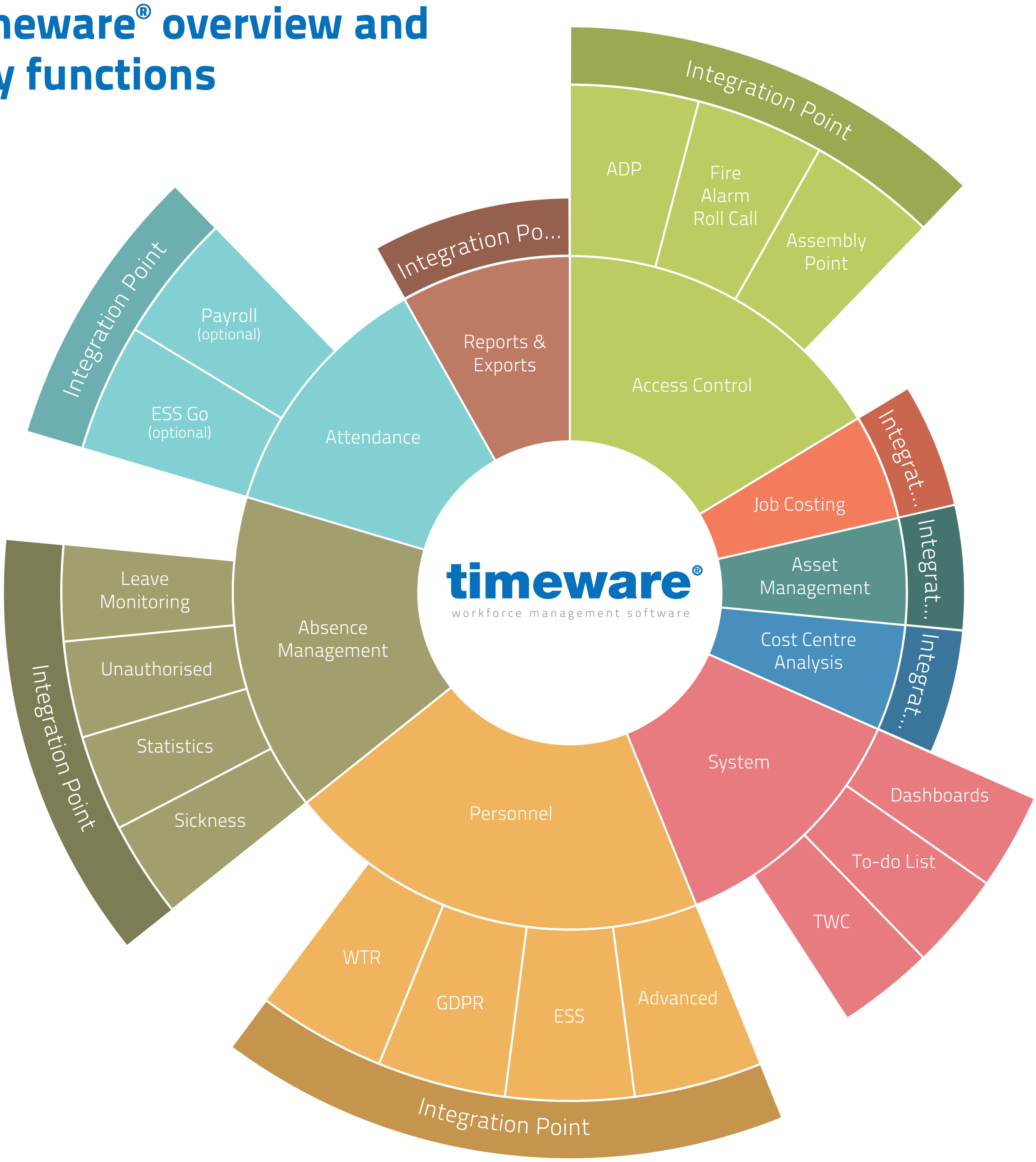
timeware®

workforce management software

Training guide:

timeware® overview and key functions



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

www.timeware.org

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Contents

All information pertaining to any personnel record within this document is obtained from a demonstration database and are not details of any individual.

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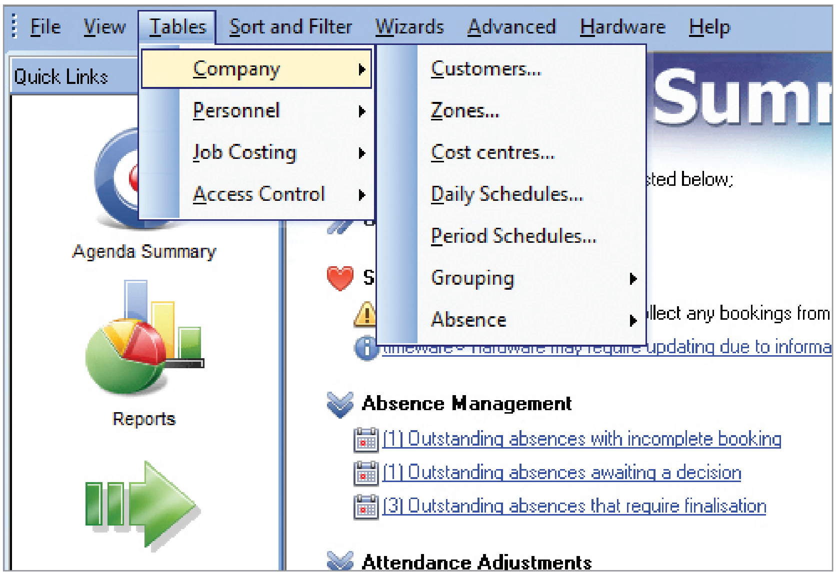
Module:

m/01/501
Preparing your timeware® system: Company

> The following module should be completed for every timeware® installation.

1. To prepare timeware® Company settings, select the Tables menu then Company.



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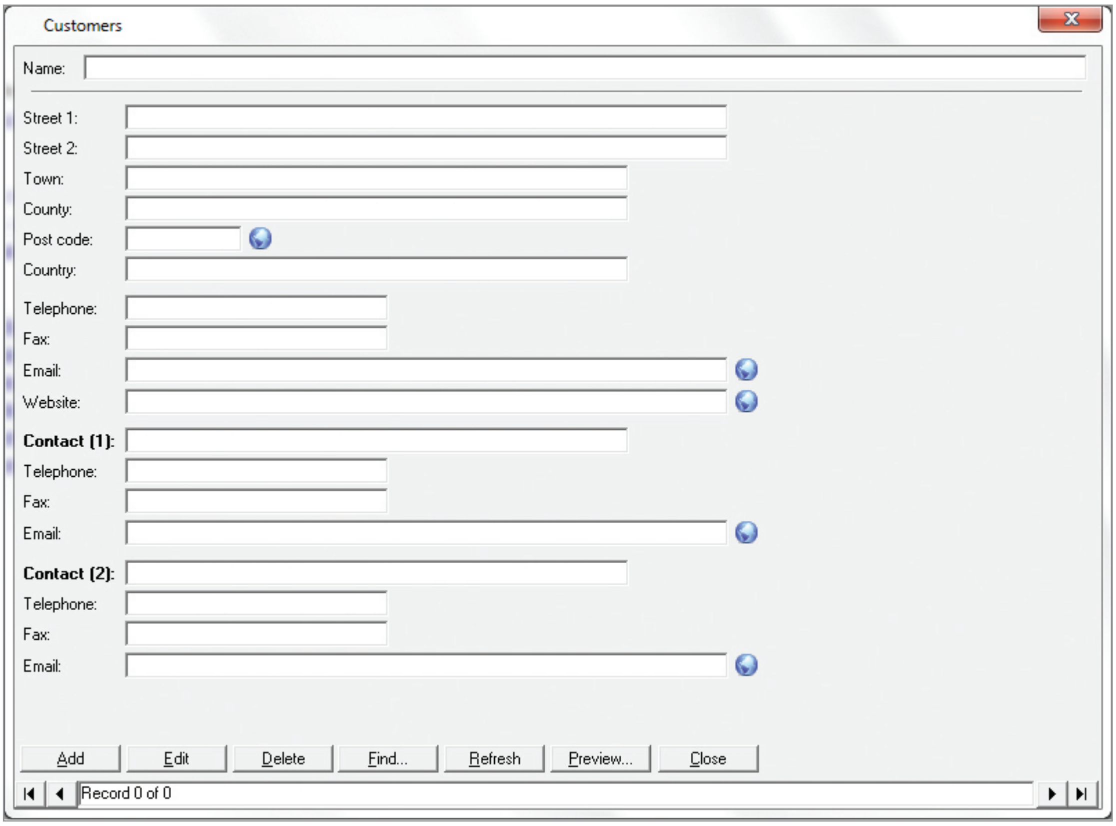
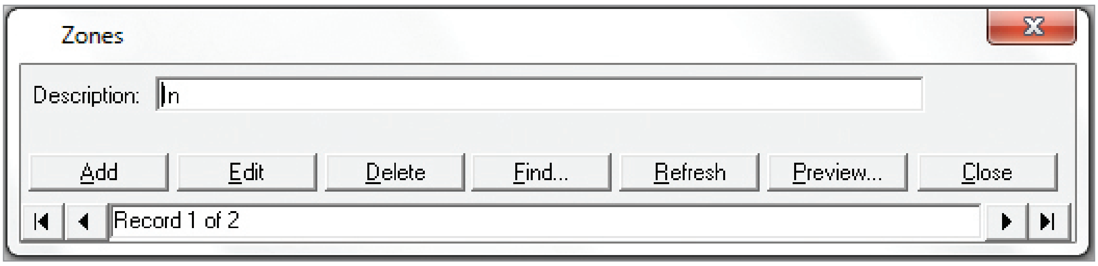
2. Select the Customers option from the menu. This is used to create customer references for the timeware® job costing options (timeware® 2012 onwards).



Clicking on the 'world' symbol,  allows the user to access the default email service or the Google Maps feature on the web.

Additional customers may be added by the user.

3. Use the Zone option to create descriptions of zones within your location. For example you may wish to create zones called Accounts, Marketing and Reception. Zones are used primarily for roll-call purposes.



There are two pre-defined Zones:

d. Inside the building

e. Outside the building

Additional zones may be added by the user.

Remember that the roll-call feature relies on zones therefore it is not recommended that the user deletes all of the zones.

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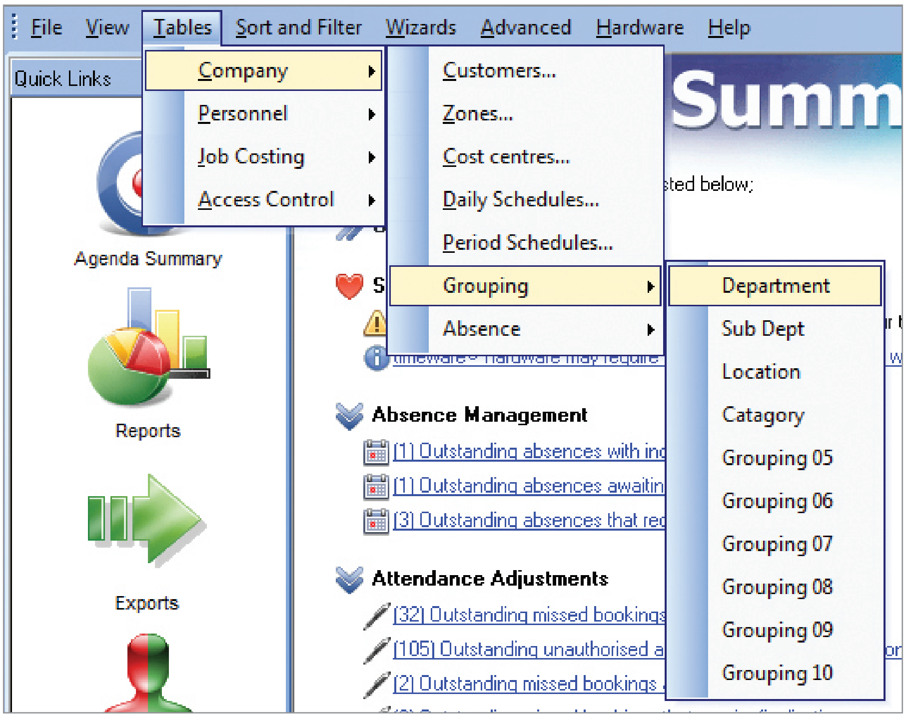
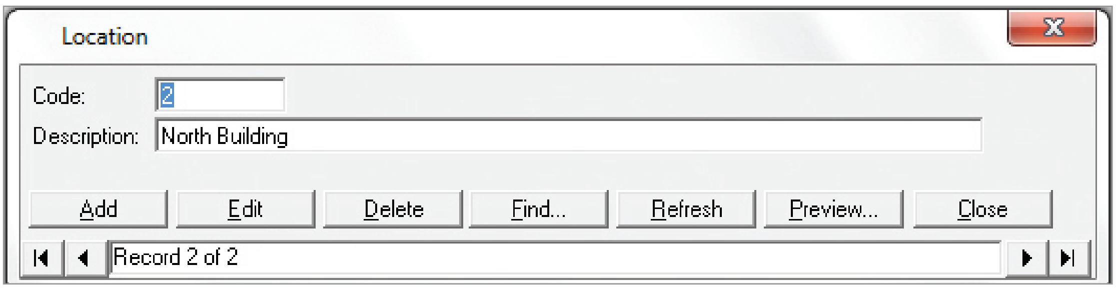
4. Use the Grouping option to create descriptions of sub-groups within your previously defined grouping descriptions, (see advanced options, module m/01/0035). Groups are used for sorting and reporting.





There are no pre-defined Groupings:

Additional sub-groups may be added by the user.

Next create User profiles. User profiles are required for each person allowed to use the timeware® software. This process requires Agendas and Permissions to be set correctly to determine the information that each User may view or be able to access.

Select Advanced then click Users...

Select Advanced then click Users...

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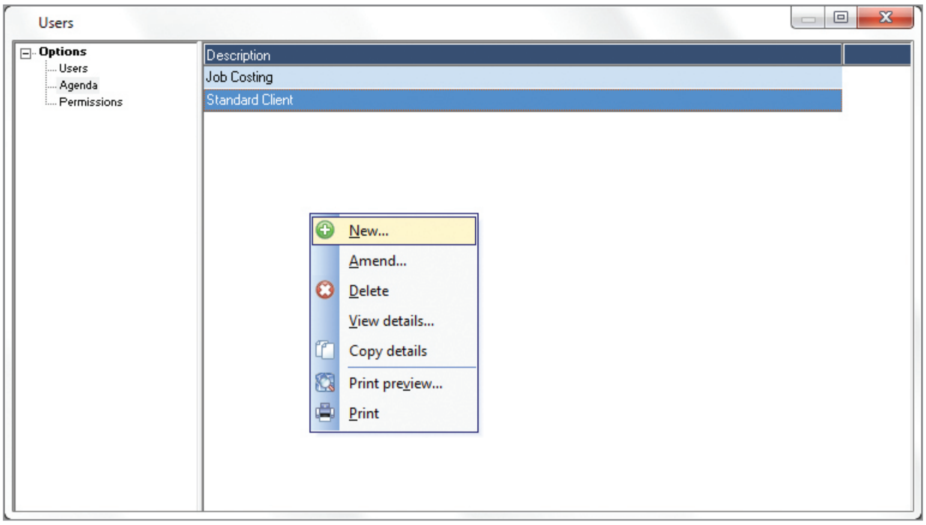
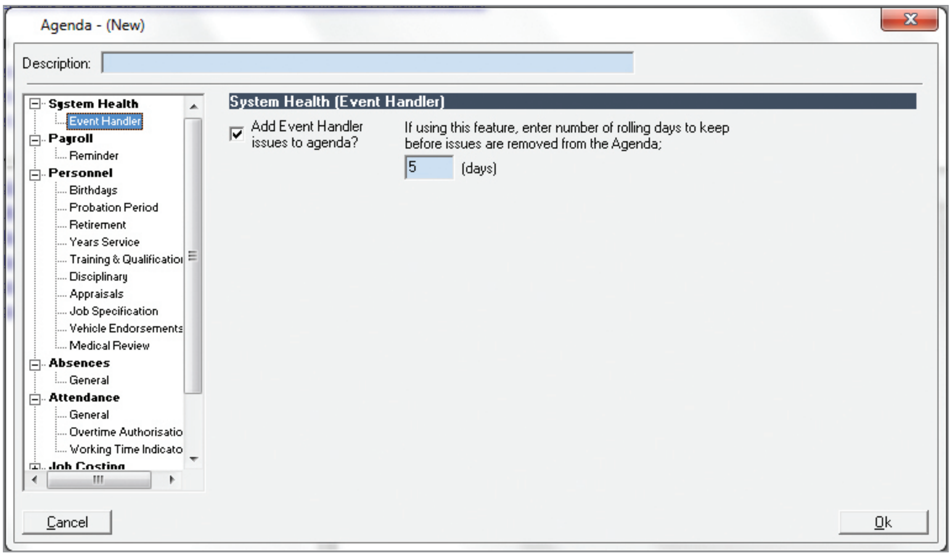
To create a new agenda, select Options, Agenda. <Right-click> on the description grid and select New...

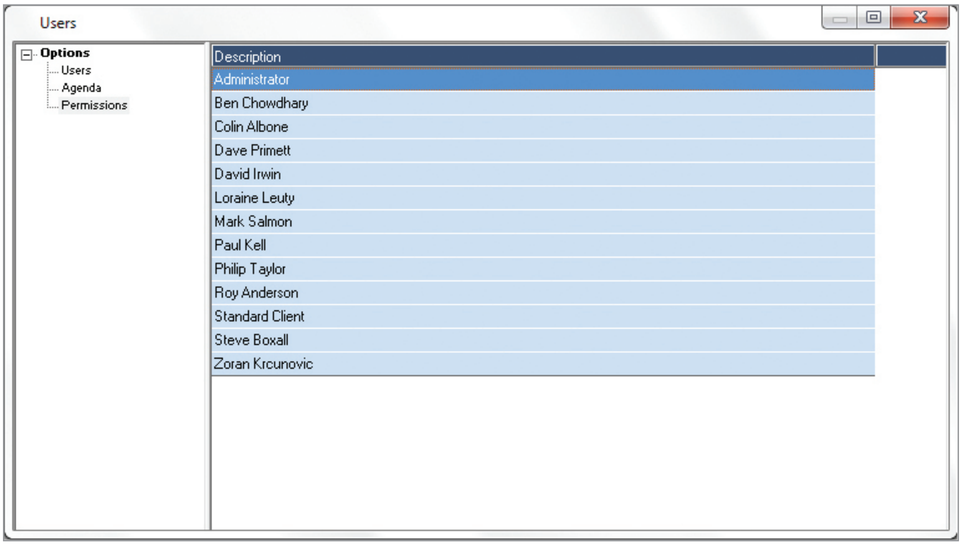


Move through the various headings on the left to determine whether they should be included in the User's agenda.

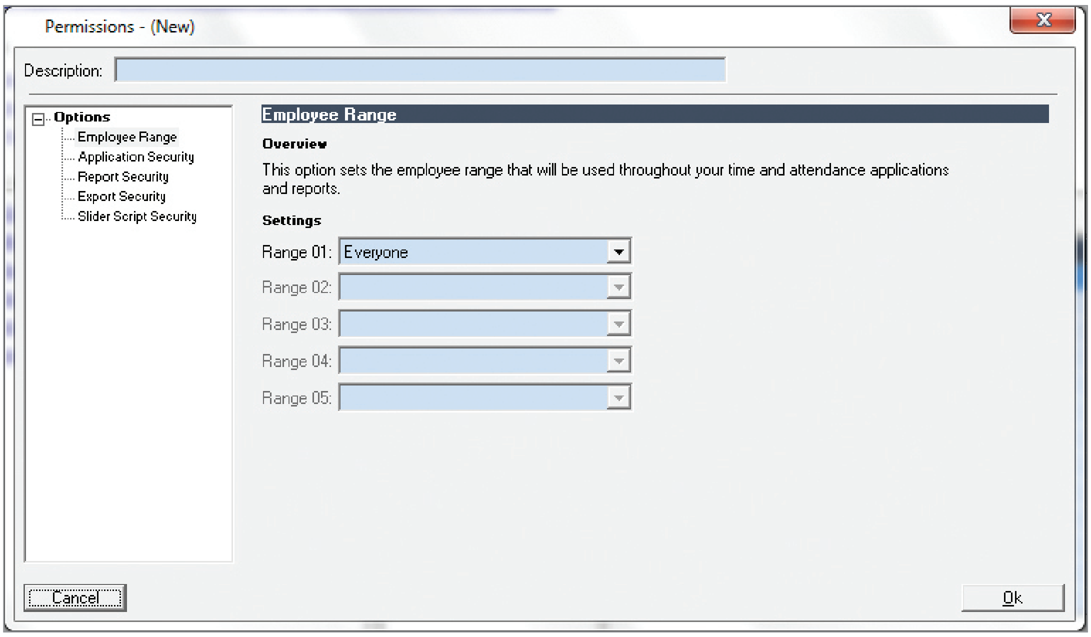


Finally, click <Ok> to save the new Agenda and return to the User screen.

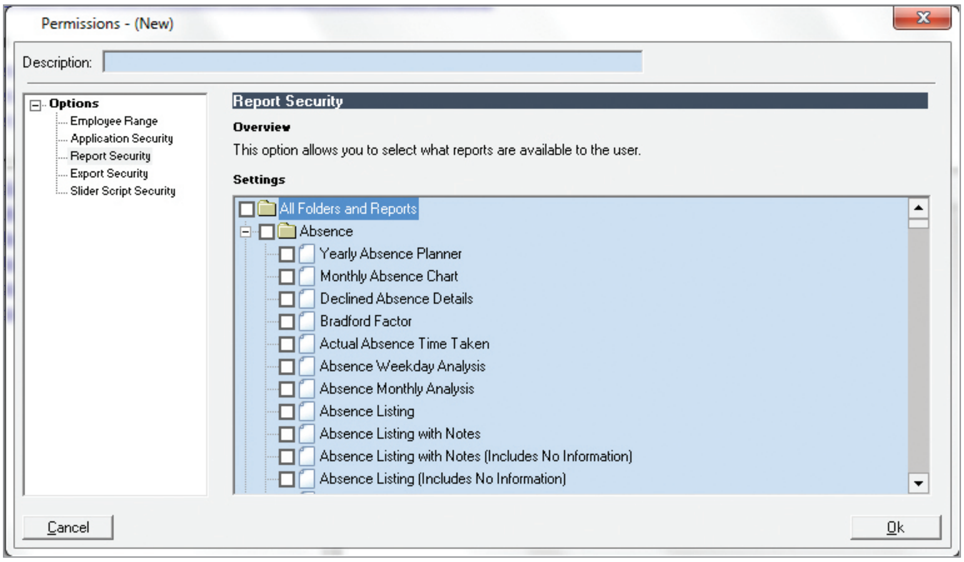
Next, create a Permissions profile for the User.



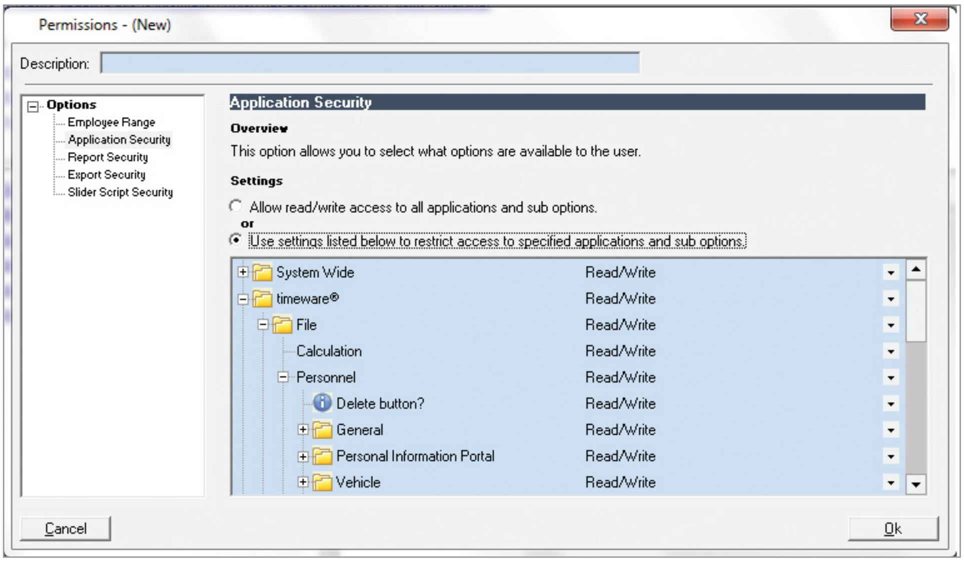
Select the Employee range that this user will be able to see.



Next, Select Report Security and select which reports the User can run.



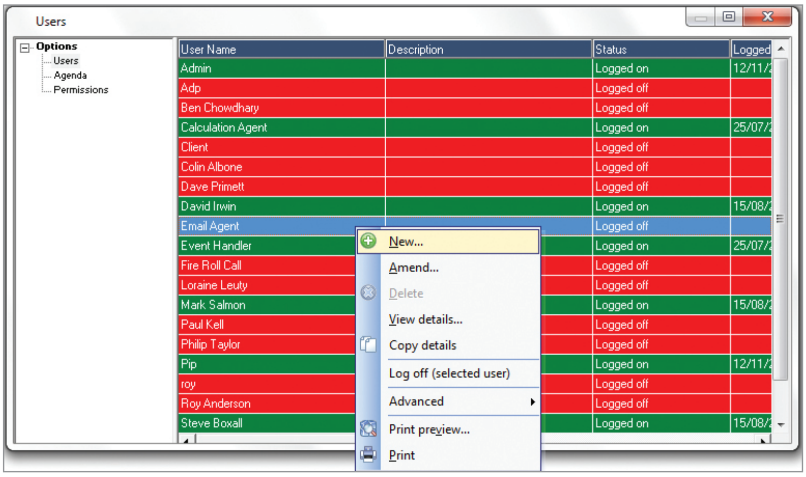
Finally, select Application security and specify which options the user may access and whether they have read/write or view only capabilities.



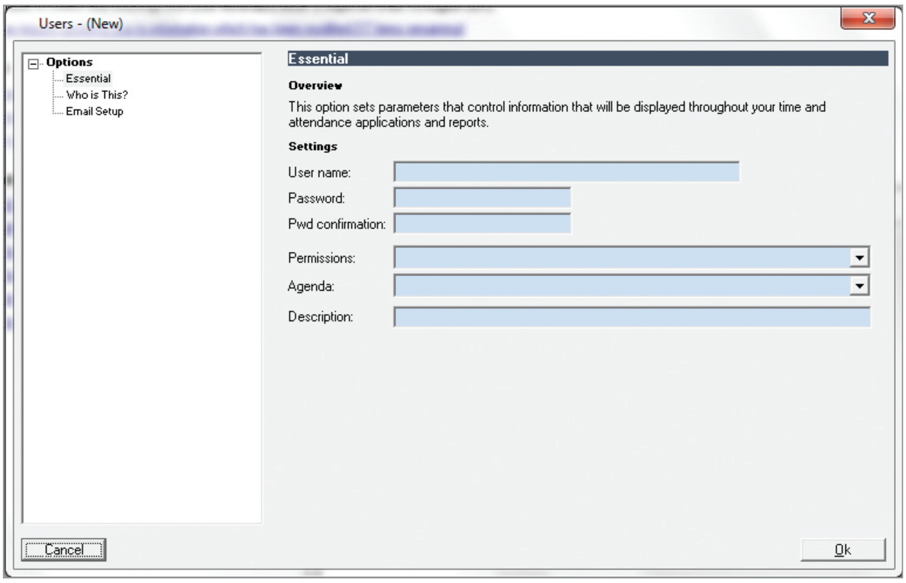
Finally, click <Ok> to save the new Permission and return to the User screen.

Now we create a new user and assign them the correct agenda and permissions profile.

Select Users, <Right-click> on the grid and select New...



Next enter the Essential information including User Name and password (the details that are used when logging in). Now allocate a Permission policy, an Agenda and a brief description.



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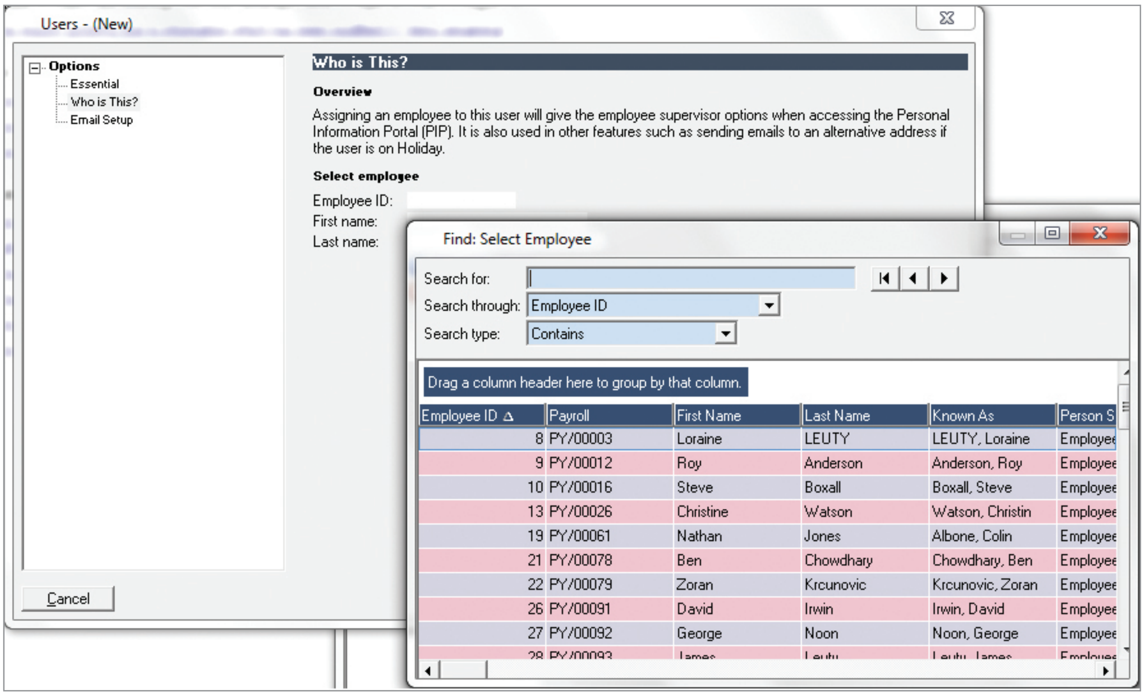
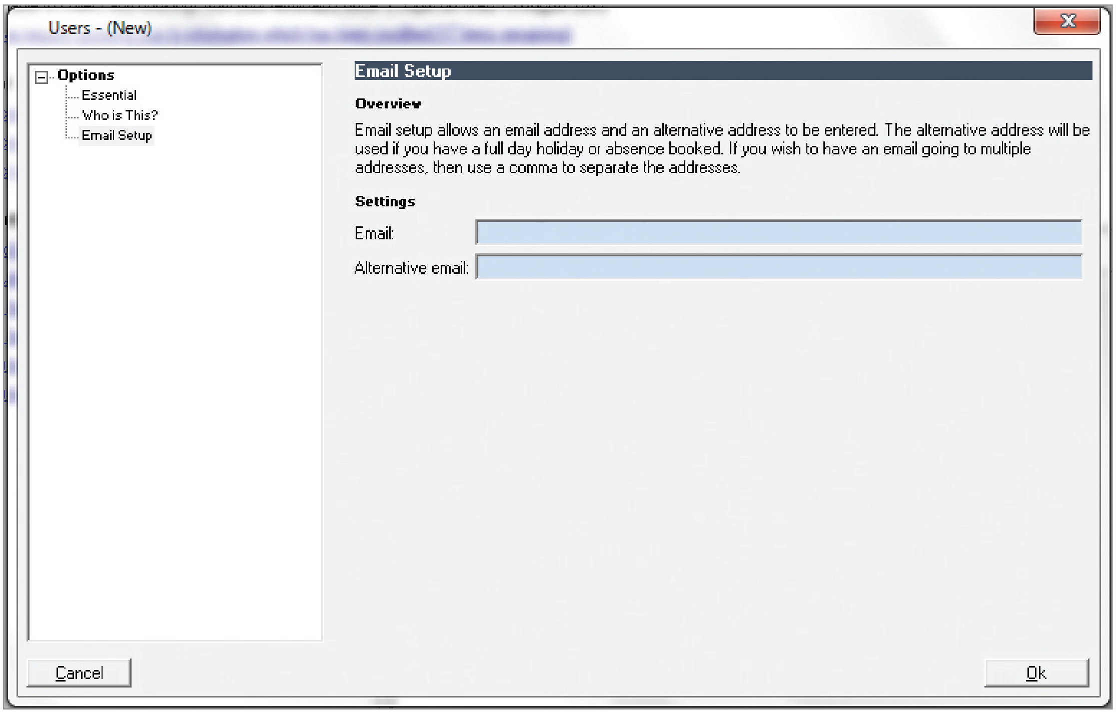
Next click 'Who is This?' and select the user from the personnel list.

This process links the user to an person and is essential when creating PIP supervisors.



This process links the user to an person and is essential when creating PIP supervisors.

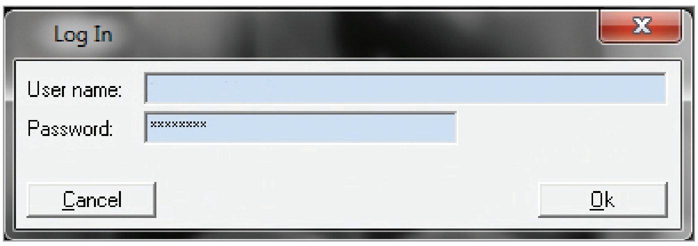
Select Option, Email Setup and enter an Email address (and alternative Email) for the User.



This process creates the addresses that are used by the system Email script.

Finally, select <Ok> to create the new User.

The new User will now be able to log into timeware®.

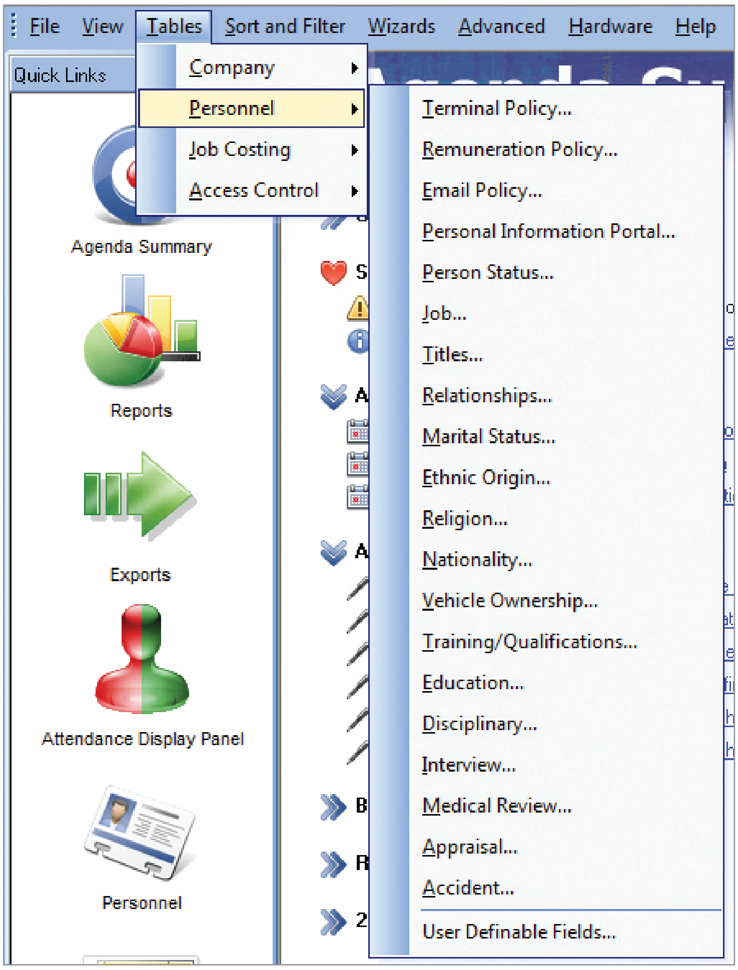


Module:

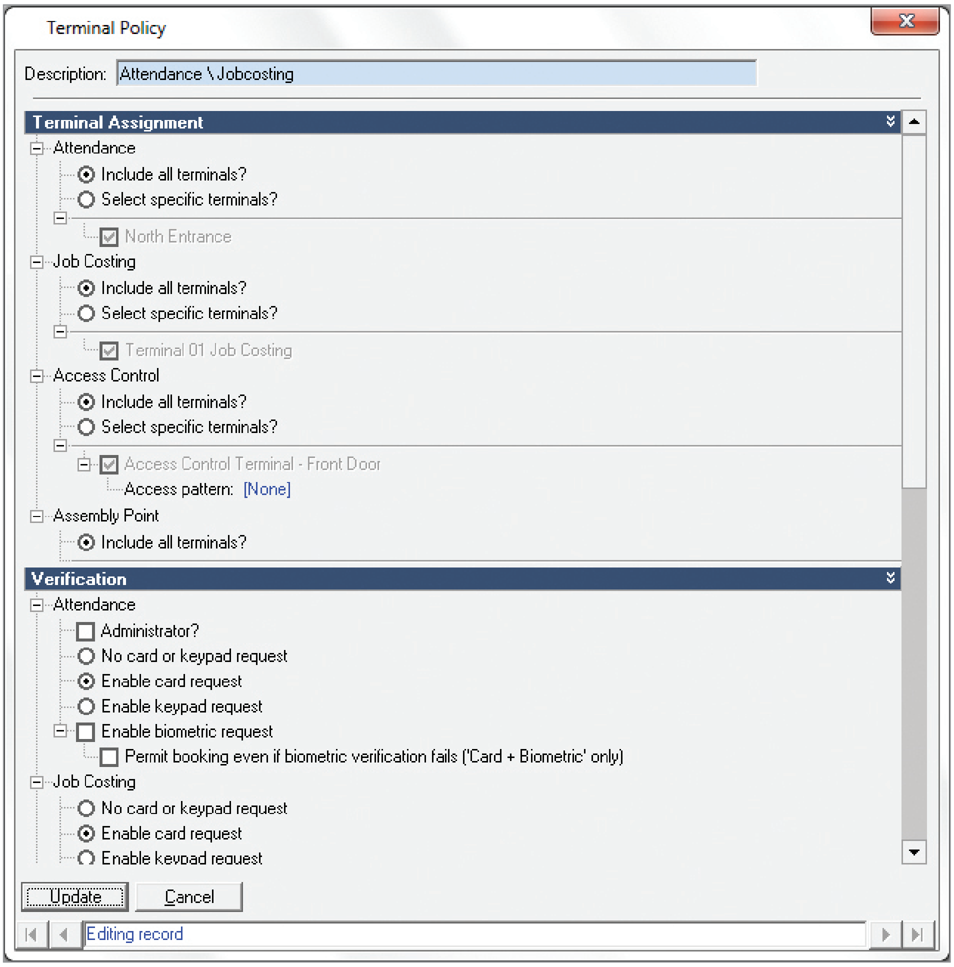
m/02/501
Preparing your timeware® system: Personnel

The following module should be completed for every timeware® installation.

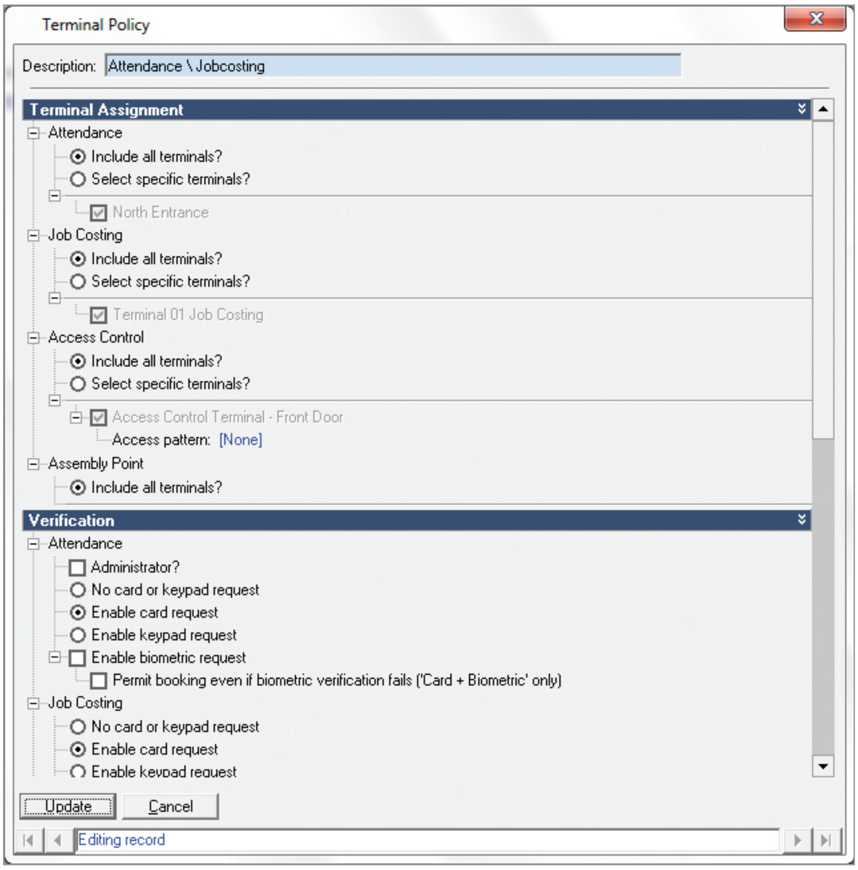
1. To prepare timeware® personnel, select the Tables menu then Personnel.



2. The Terminal Policy determines the features that are available to a person at the terminal. For example, on an attendance terminal, should a person type their badge number into the terminal or should they use their fingerprint or card?



The terminals covered are Attendance, Job Costing, Access Control and Assembly Points.



There are four pre-defined terminal policies:

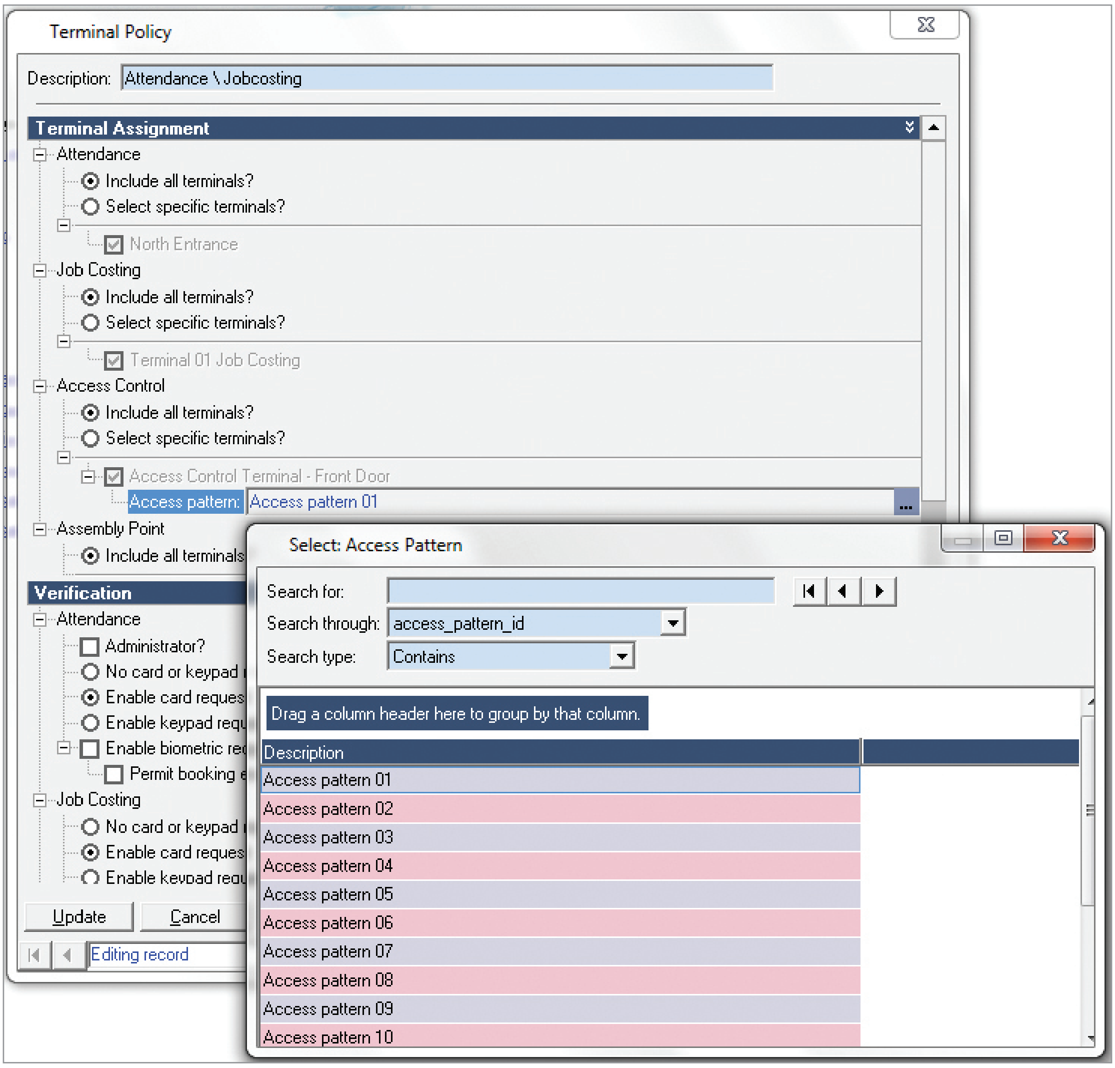
- **a.** Biometric (disallow failures)
- **b.** Biometric (allow failures)
- **c.** Card/fob
- **d.** Keypad

Additional policies may be added by the user.

Special notes for access terminals

When configuring each of the access terminal, the user can determine which of the pre-defined access pattern may be used.

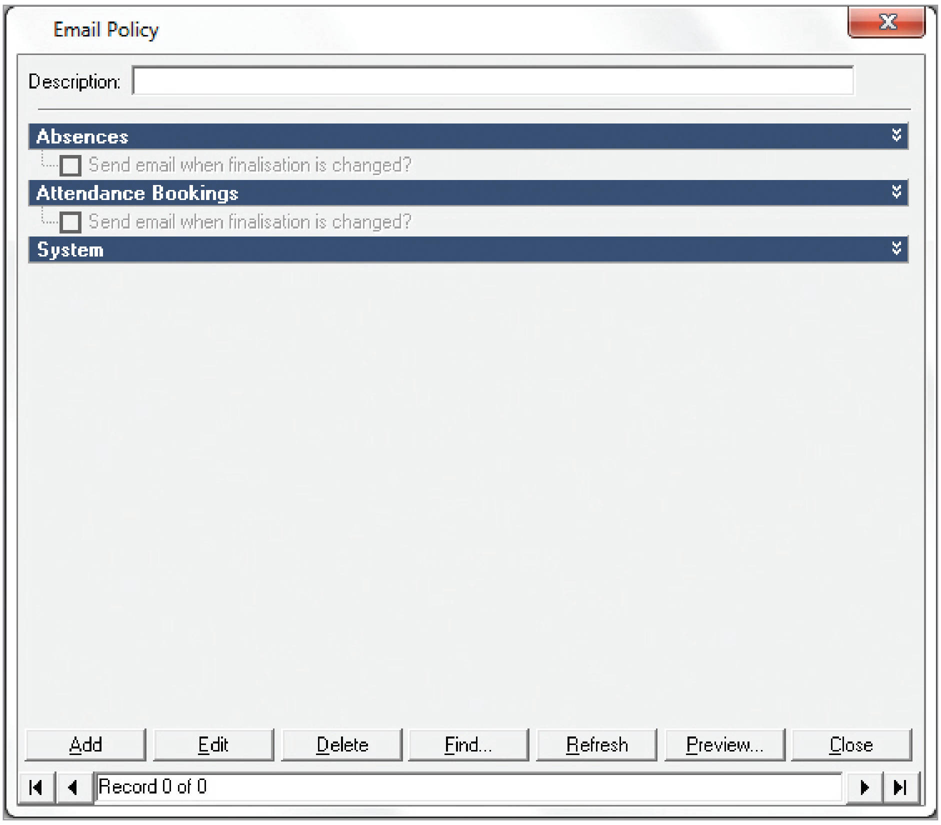
It is recommended that the access patterns are created before completing the terminal policies.



3. The Email Policy determines whether an email should be sent to the person when:

   a. An absence request is finalised by a Manager

   b. A manually entered booking (through the PIP) is finalised by a Manager.



There are two pre-defined Email policies:

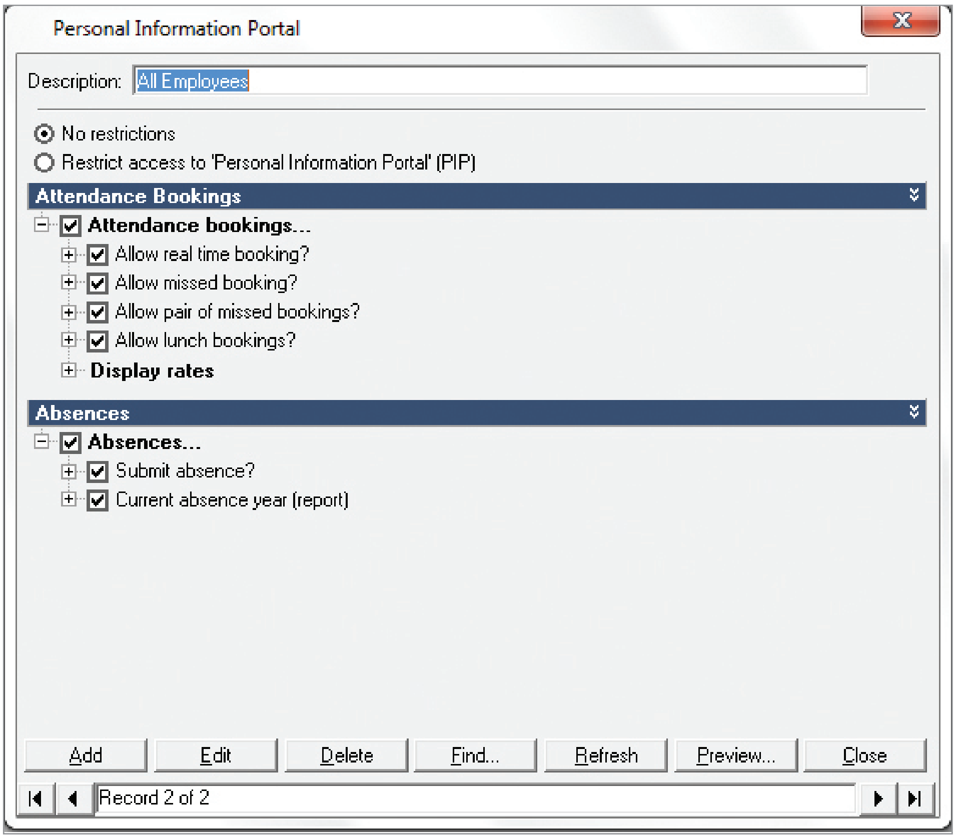
a. Receive finalisation Email

b. Do not receive finalisation Email

Additional policies may be added by the user.

Remember for the Email features to work, the timeware administrator must have configured the Email setup in Advanced Options, (module m-01-035).

4. The Personal Information Panel (PIP) profile determines what features a person can access when using the PIP.



There are three pre-defined PIP profiles:

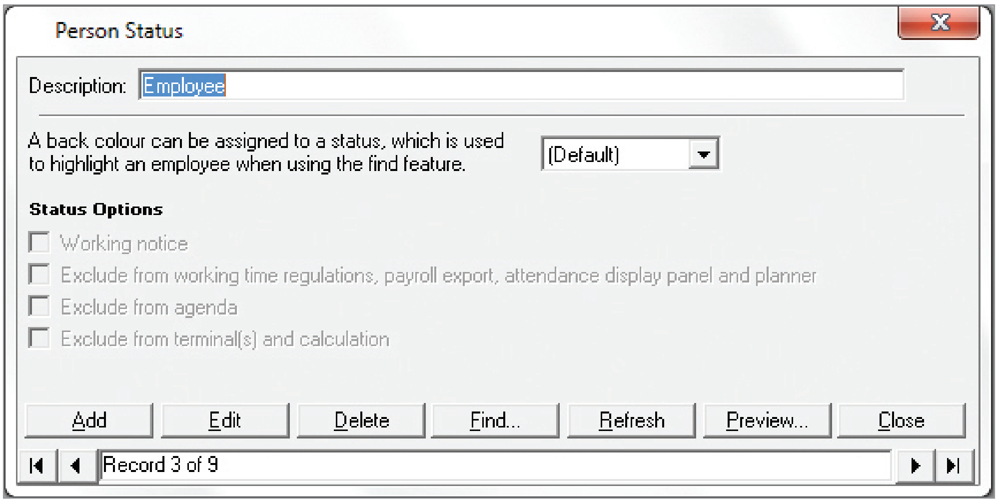
a. Attendance only

b. Absence only

c. Attendance & Absence

Additional profiles may be added by the user.

5. The Person Status may be used to categorise employees. It is mainly used to highlight leavers, to exclude people from the agenda, to exclude people from the terminal and calculation.



There are six pre-defined Employee Status:

a. Full-time employee

b. Part-time employee

c. Working notice

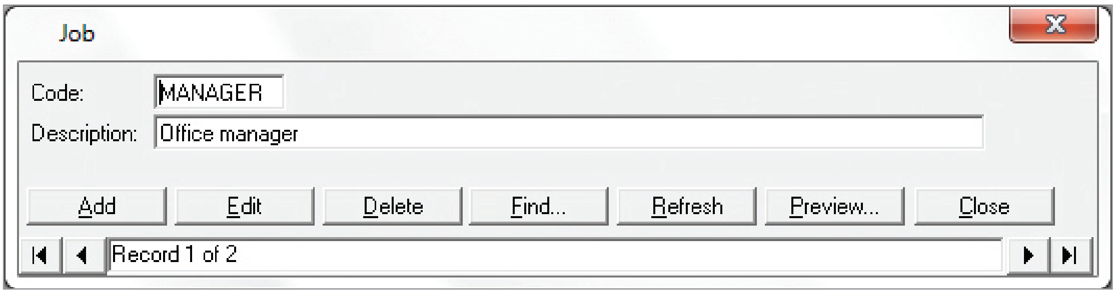
d. Exclude from reports, payroll export, realtime locator and planner

e. Exclude from agenda

f. Exclude from terminal and calculation

Additional profiles may be added by the user.

6. The Job Code & Description are used in the Personnel, Job Specification screen.



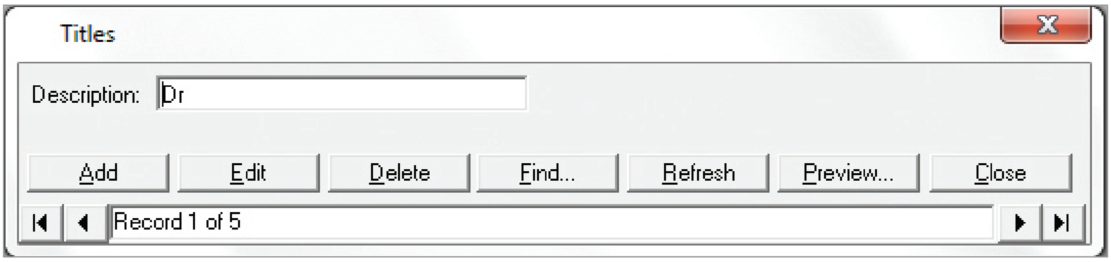
There are two pre-defined job descriptions:

a. Manager

b. Administrator

Additional job descriptions may be added by the user.

7. Titles are used in the Personnel, personal screen



There are seven pre-defined titles:

a. Mr.

b. Mrs.

c. Ms.

d. Master.

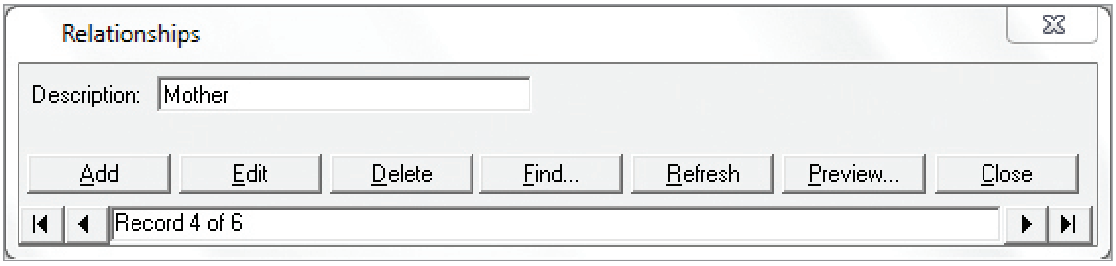
e. Dr.

f. Sir

g. Prof.

Additional titles may be added by the user.

8. Relationships are used in the Personnel, Contact Details screen.

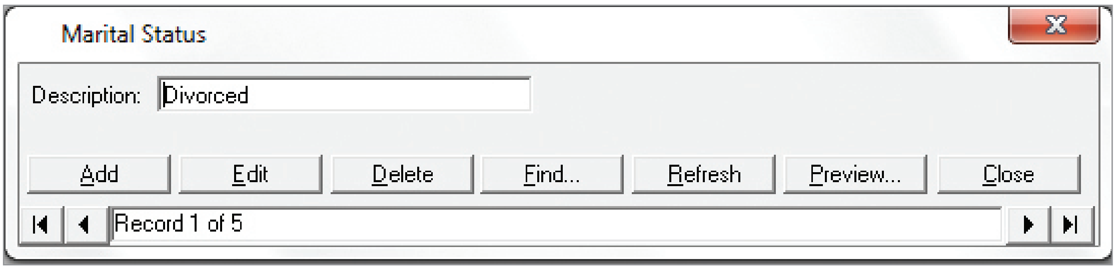


There are six pre-defined relationships:

- **a.** Husband
- **b.** Wife
- **c.** Son
- **d.** Daughter
- **e.** Aunt
- **f.** Uncle

Additional relationships may be added by the user.

9. Marital Status is used in the Personnel, Personal screen.

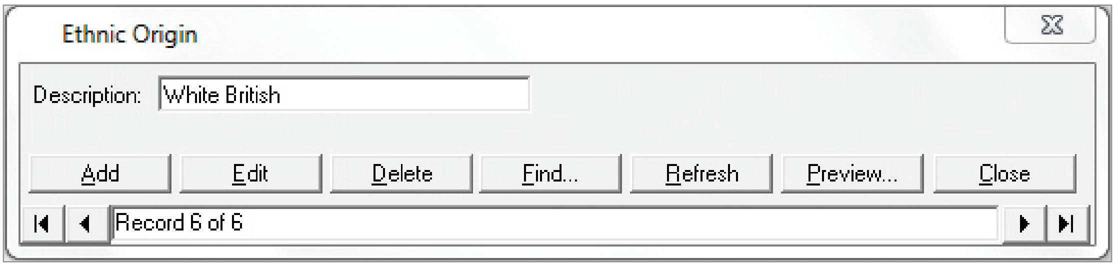


There are four pre-defined Marital Status:

a. Married
b. Single
c. Divorced
d. Separated

Additional marital status may be added by the user.

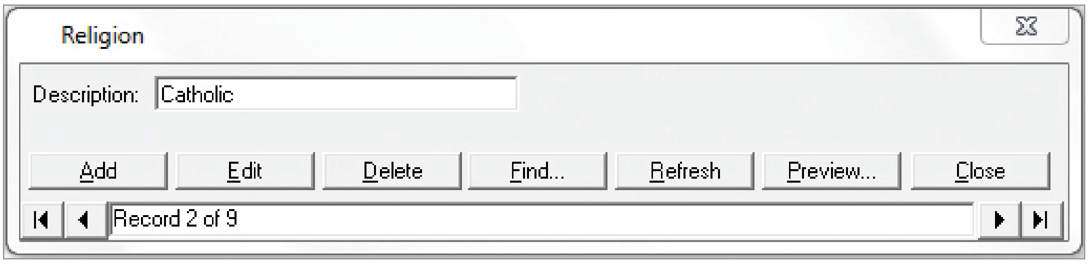
10. Ethnic Origin is used in the Personnel, Personal screen.



There are a number of pre-defined ethnic origins:

Additional ethnic origins may be added by the user.

11. Religion is used in the Personnel, Personal screen.



There are a number of pre-defined religions:

Additional religions may be added by the user.

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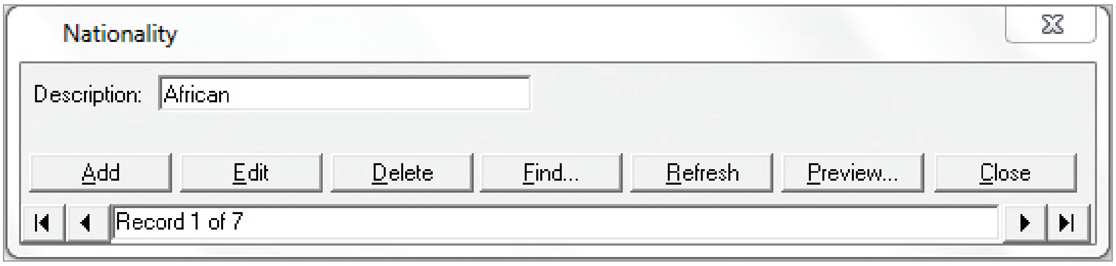
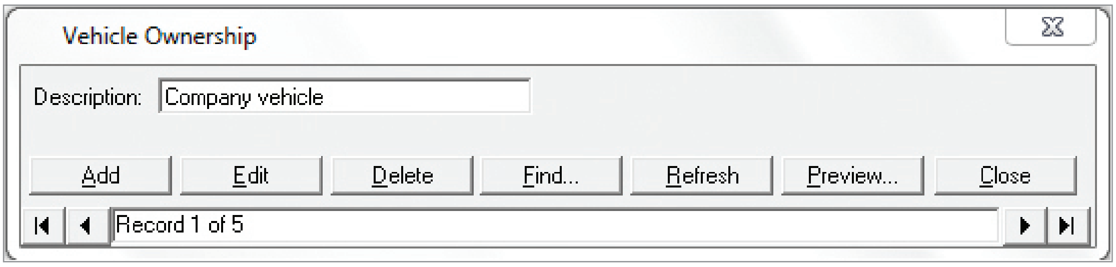
12. Nationality is used in the Personnel, Personal screen.



There are a number of pre-defined nationalities.

Additional nationalities may be added by the user.

13. Vehicle Ownership is used in Personnel, vehicle, general.



There are three pre-defined vehicle ownerships:

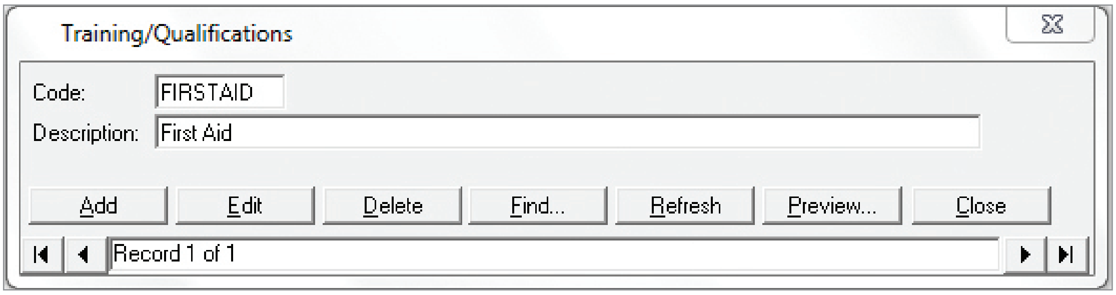
a. Contract hire

b. Leased

c. Purchased

Additional vehicle ownerships may be added by the user.

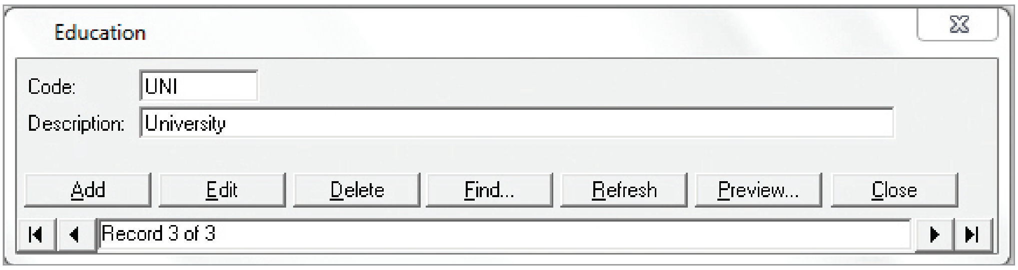
14. Training/Qualifications are used in the Personnel, Miscellaneous, Training/Qualifications screen.



There are a number of pre-defined training/qualifications.

Additional training/qualifications may be added by the user.

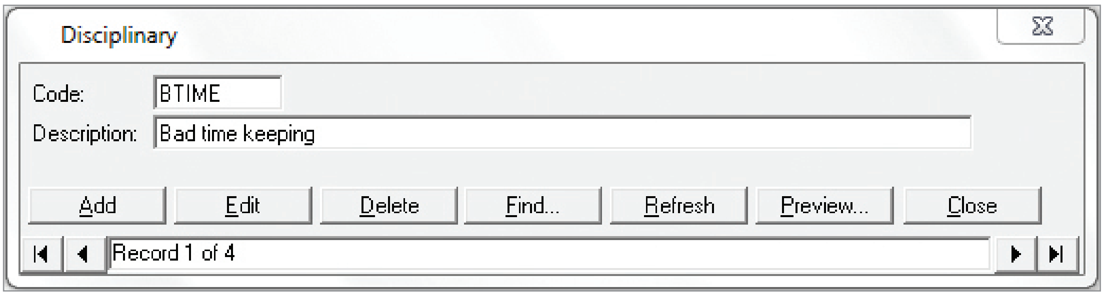
15. Education codes are used in the Personnel, Miscellaneous, Education screen.



There are a number of pre-defined education codes.

Additional education codes may be added by the user.

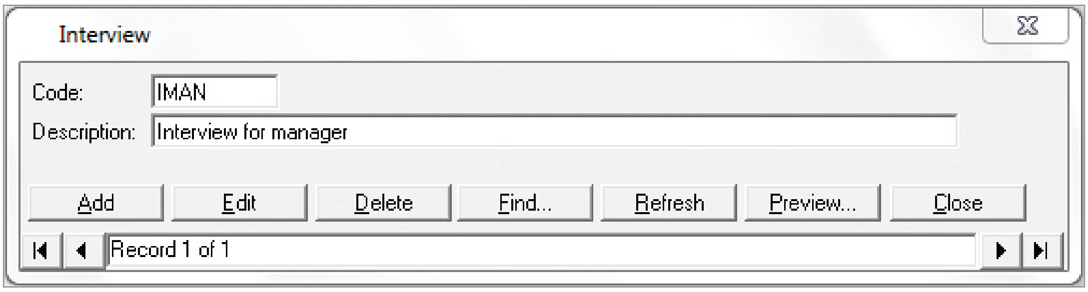
16. Disciplinary codes are used in the Personnel, Miscellaneous, Disciplinary screen.



There are a number of pre-defined disciplinary codes.

Additional disciplinary codes may be added by the user.

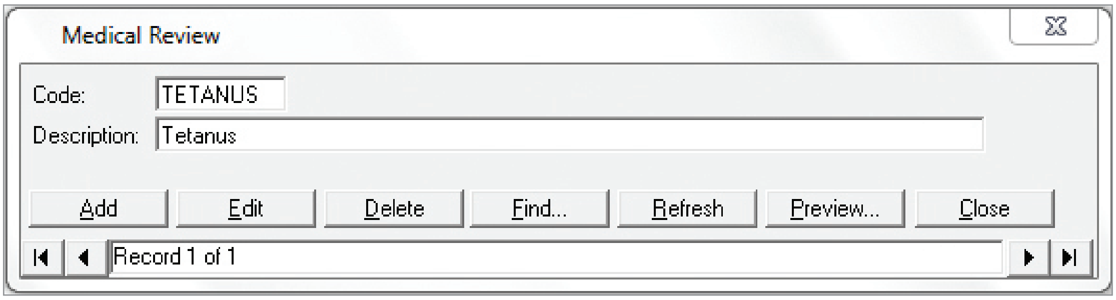
17. Interview codes are used in the Personnel, Miscellaneous, Interview screen.



There are a number of pre-defined interview codes.

Additional interview codes may be added by the user.

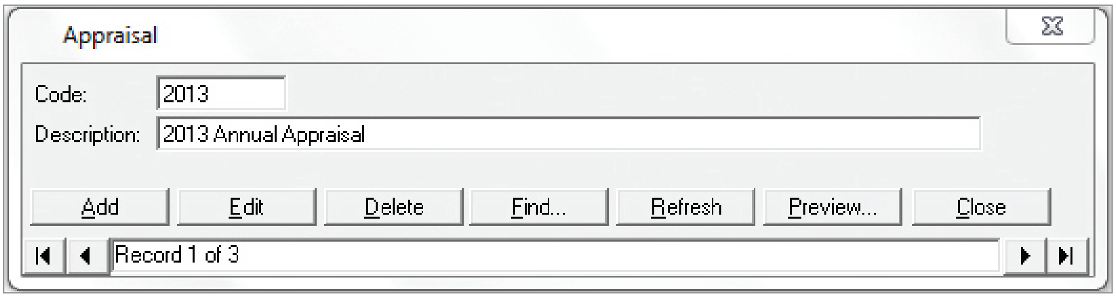
18. Medical Review codes are used in the Personnel, Miscellaneous, Medical Review screen.



There are a number of pre-defined medical review codes.

Additional medical review codes may be added by the user.

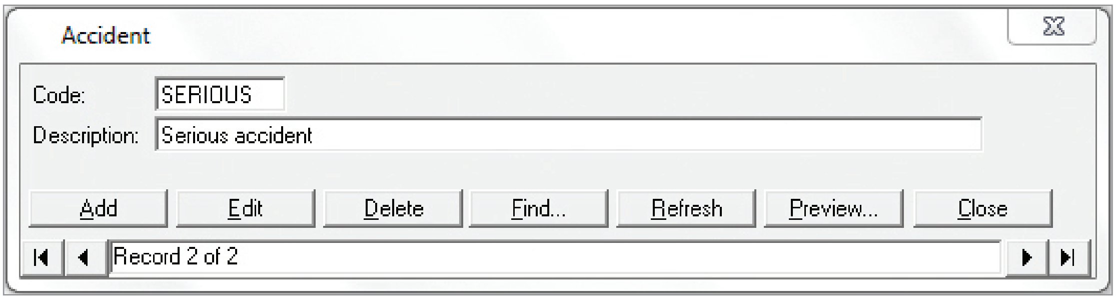
19. Appraisal codes are used in the Personnel, Miscellaneous, Appraisal screen.



There are a number of pre-defined appraisal codes.

Additional appraisal codes may be added by the user.

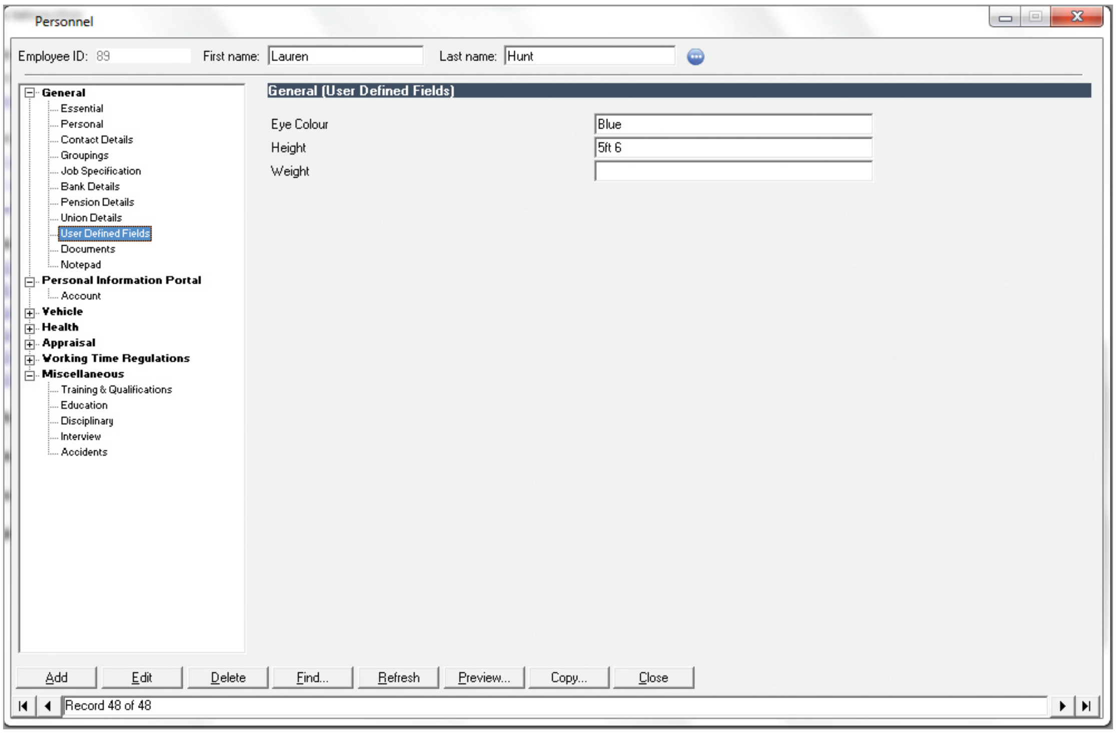
20. Accident codes are used in the Personnel, Miscellaneous, Accident screen.



There are a number of pre-defined accident codes.

Additional accident codes may be added by the user.

21. User Defined Fields are used in the Personnel, General, User Defined screen. UDFs are used to define fields for data that are not covered elsewhere by the system. For example, if a company requires to log each person's locker key number, a UDF can be created to store this information.



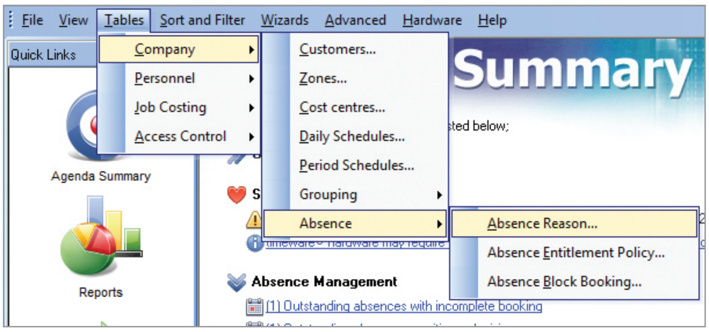
Multiple UDFs may be created by the user.

Module:

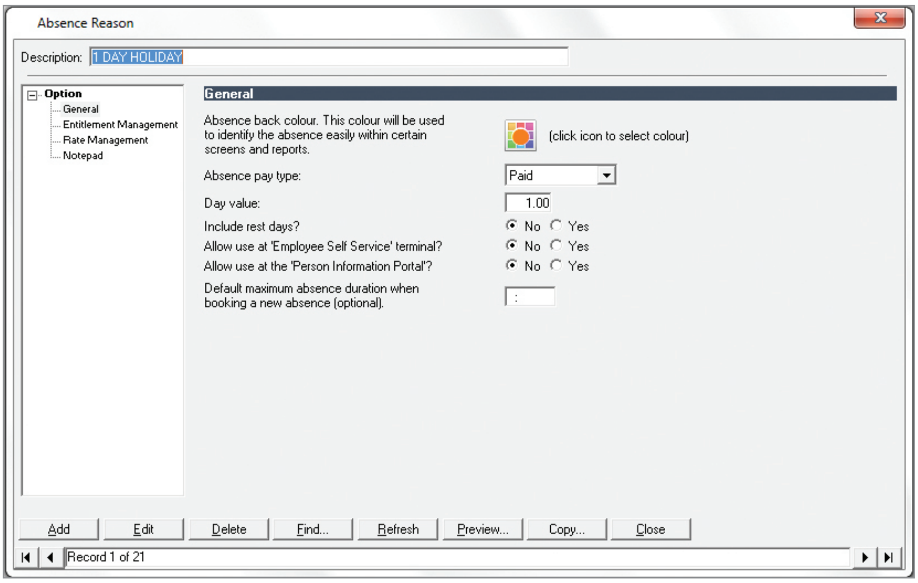
m/03/501
Preparing your timeware® system: Absence Management

The following module should be completed for every timeware® installation.

1. To prepare timeware® Absence reasons, select the Tables menu then Company, Absences and Absence reason...



The following screen allows the user to create different absence reasons and allocate each one to an absence category.



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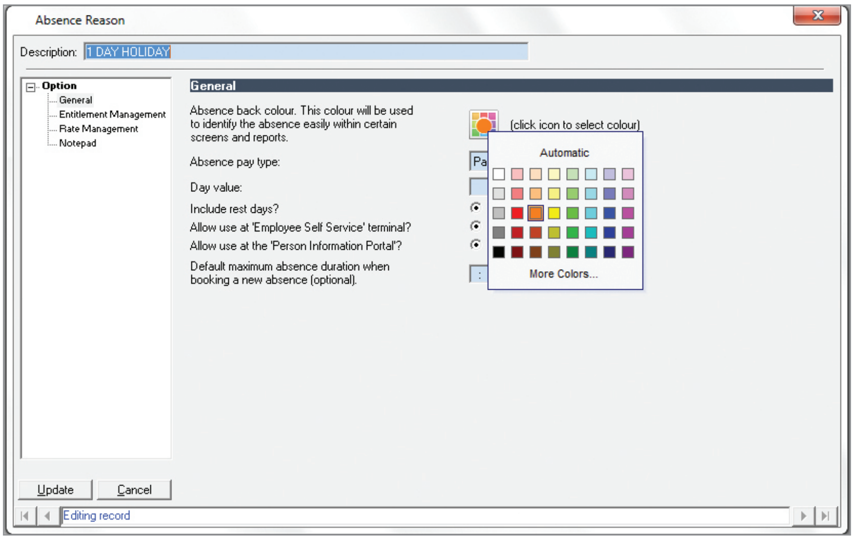
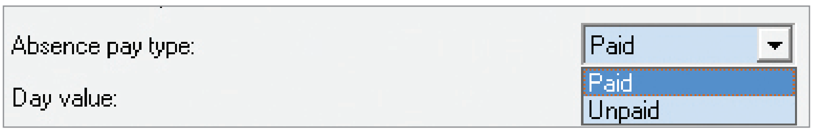
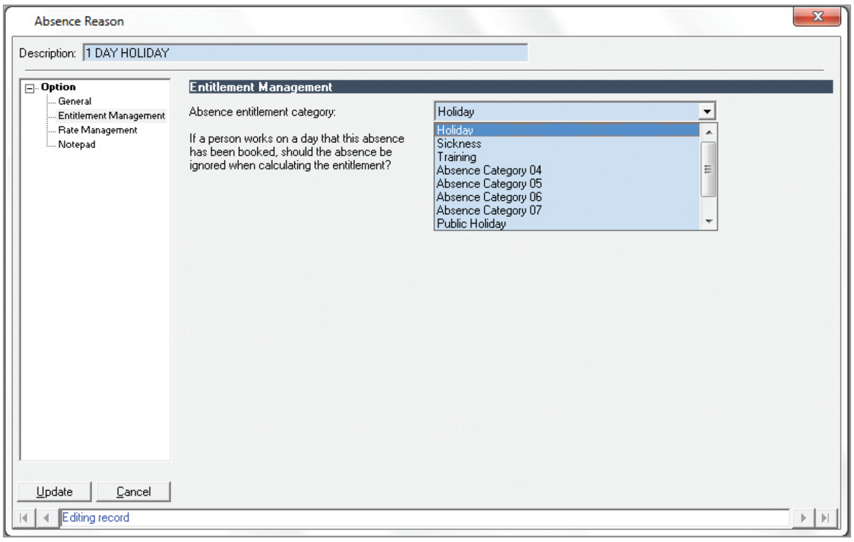
Each absence reason must be given a description and may be allocated a colour. (This colour will appear on the absence statistics and absence and holiday planner screens).



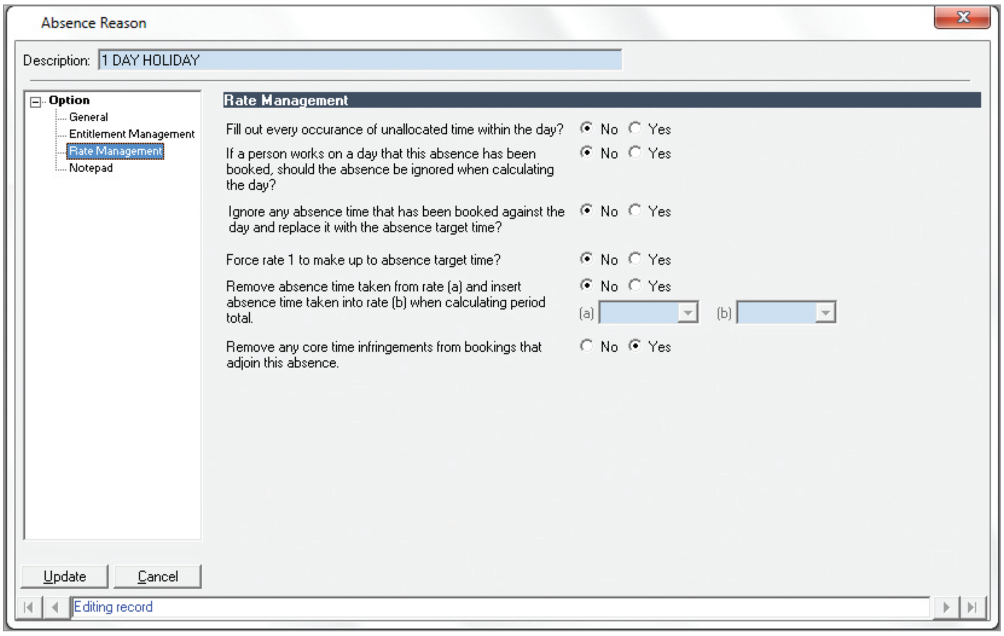
Next, select if the absence reason is paid or unpaid.



Now, select which category the absence reason should fall under.



Finally, define the absence rate management.



Remember that there many pre-defined absence & holiday reasons and that additional reasons may be added by the user.

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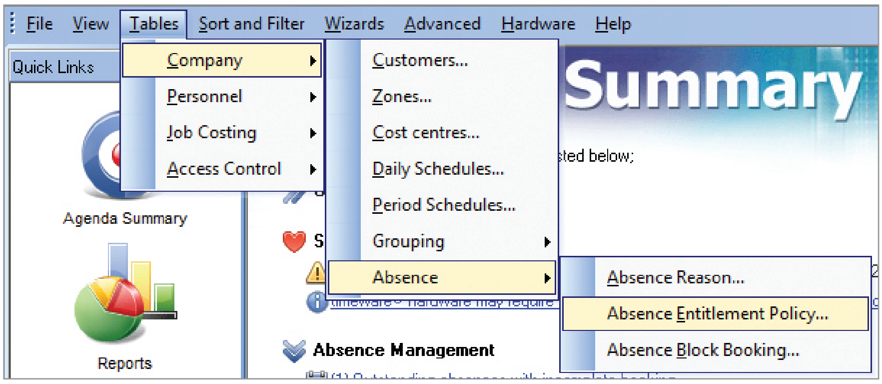
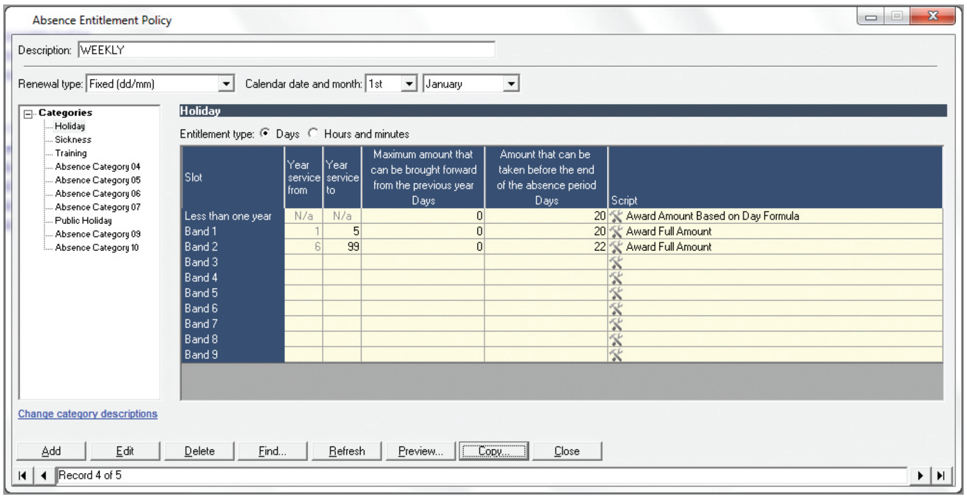
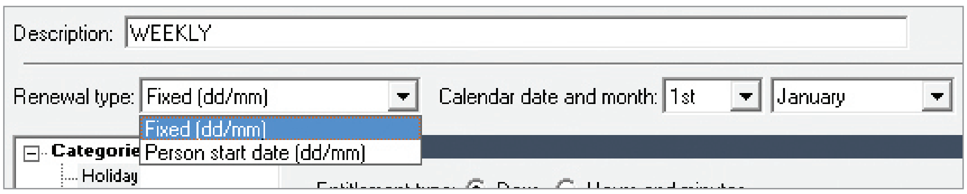
2. To prepare timeware® absence entitlement policies, select the Tables menu then Company, Absences and Absence entitlement policy.



Use this screen to create Absence and Holiday Entitlement policies.



First, define the absence year start date:

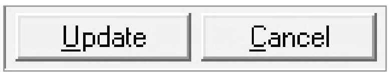


Next, choose either days or hours and minutes for the absence category:

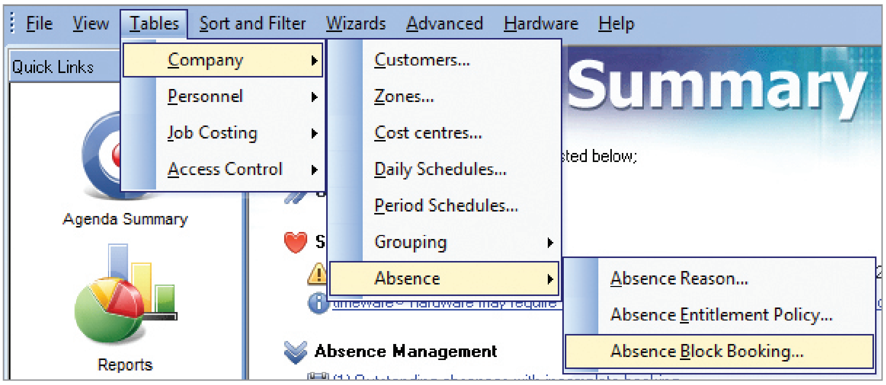
Finally, select the entitlement script that applies to the year service band.

Slot	Year service from	Year service to	Maximum amount that can be brought forward from the previous year Days	Amount that can be taken before the end of the absence period Days	Script
Less than one year	N/a	N/a	0	20	Award Amount Based on Day Formula
Band 1	1	5	0	20	Award Full Amount
Band 2	6	99	0	22	Award Full Amount
Band 3					
Band 4					
Band 5					
Band 6					
Band 7					
Band 8					
Band 9					

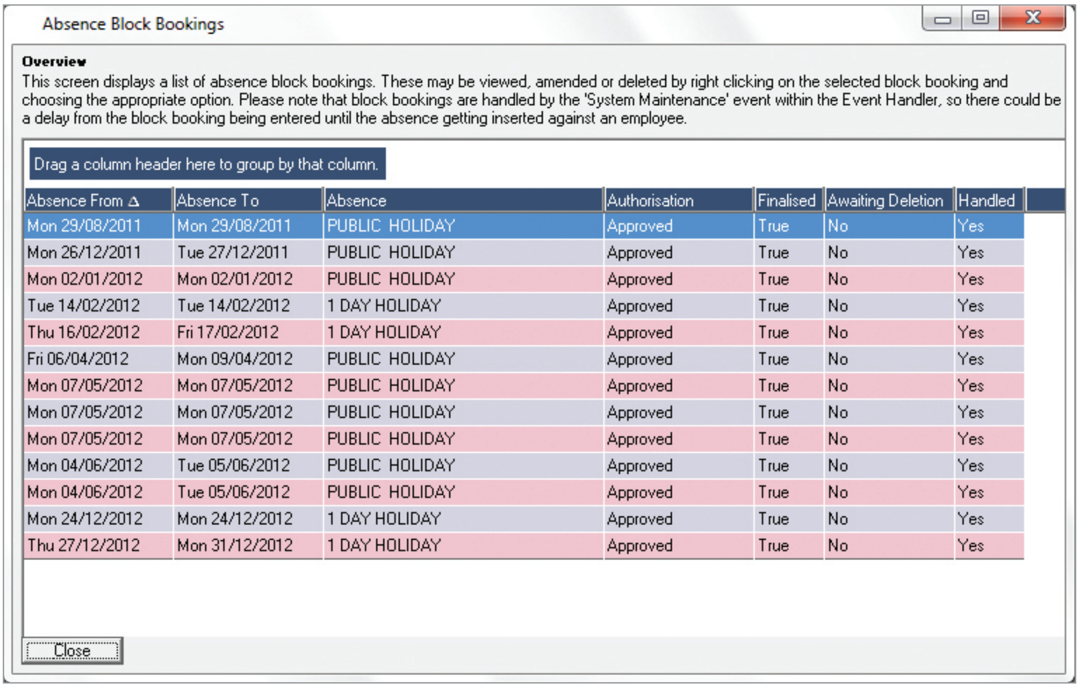
Once all of the absence categories have been defined, select the update button to save your changes.



3. To prepare timeware® absence management Block Bookings, select the Tables menu then Company, Absences and Absence and Holiday Block Bookings...

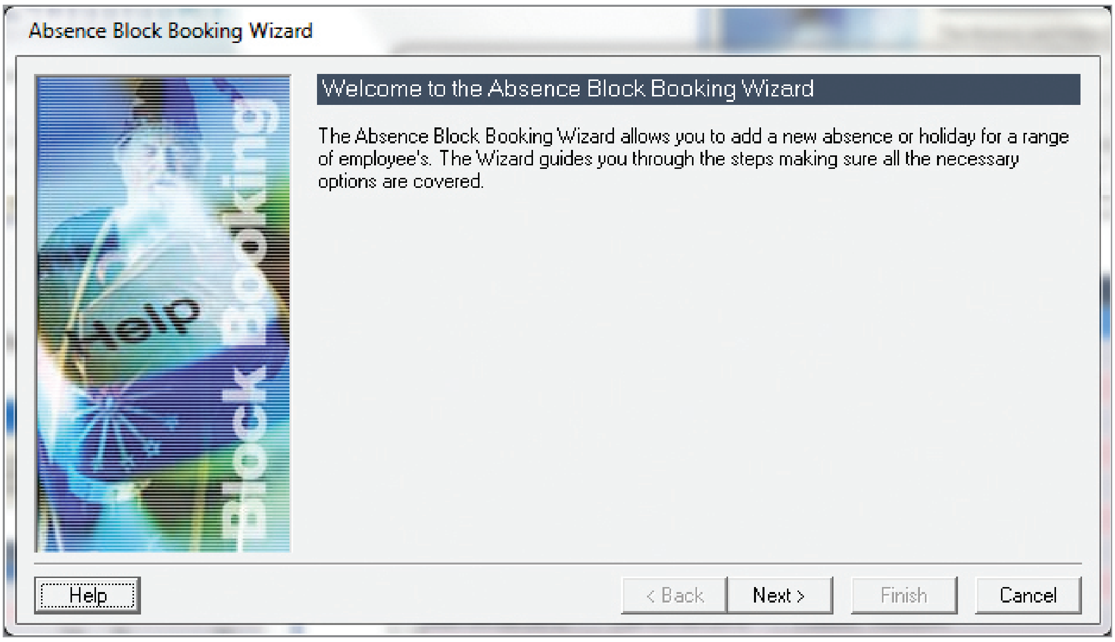


To create a new ‘block-booking’ <Right-click> on the grid and select New...

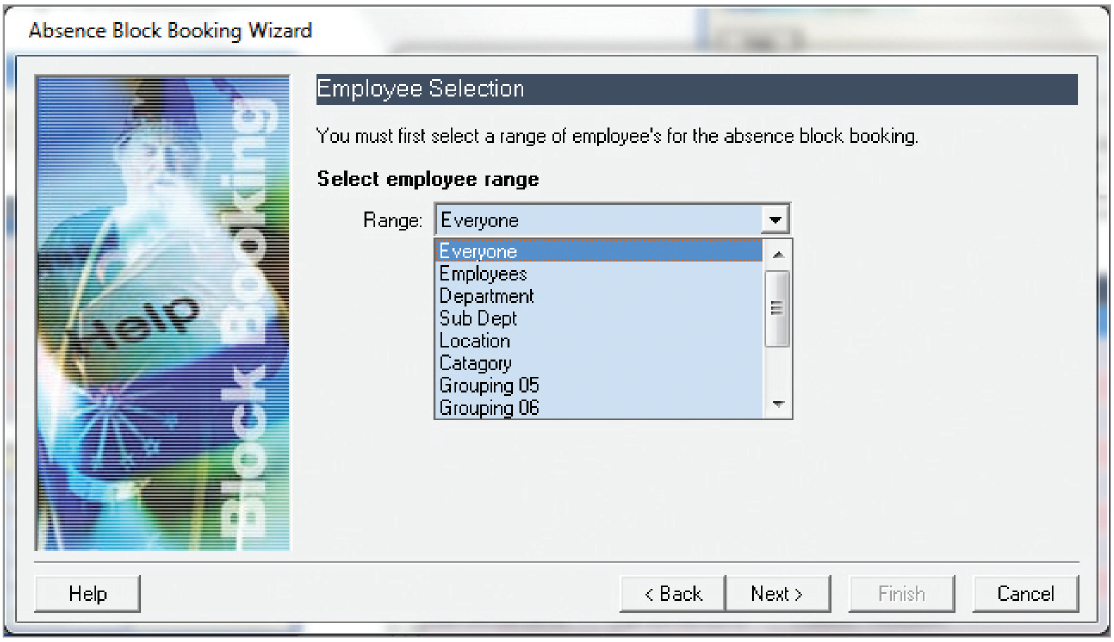


Absence From	Absence To	Absence	Authorisation	Finalised	Awaiting Deletion	Handled
Mon 29/08/2011	Mon 29/08/2011	PUBLIC HOLIDAY	Approved	True	No	Yes
Mon 26/12/2011	Tue 27/12/2011	PUBLIC HOLIDAY	Approved	True	No	Yes
Mon 02/01/2012	Mon 02/01/2012	PUBLIC HOLIDAY	Approved	True	No	Yes
Tue 14/02/2012	Tue 14/02/2012	1 DAY HOLIDAY	Approved	True	No	Yes
Thu 16/02/2012	Fri 17/02/2012	1 DAY HOLIDAY	Approved	True	No	Yes
Fri 06/04/2012	Mon 09/04/2012	PUBLIC HOLIDAY	Approved	True	No	Yes
Mon 07/05/2012	Mon 07/05/2012	PUBLIC HOLIDAY	Approved	True	No	Yes
Mon 07/05/2012	Mon 07/05/2012	PUBLIC HOLIDAY	Approved	True	No	Yes
Mon 07/05/2012	Mon 07/05/2012	PUBLIC HOLIDAY	Approved	True	No	Yes
Mon 04/06/2012	Tue 05/06/2012	PUBLIC HOLIDAY	Approved	True	No	Yes
Mon 04/06/2012	Tue 05/06/2012	PUBLIC HOLIDAY	Approved	True	No	Yes
Mon 24/12/2012	Mon 24/12/2012	1 DAY HOLIDAY	Approved	True	No	Yes
Thu 27/12/2012	Mon 31/12/2012	1 DAY HOLIDAY	Approved	True	No	Yes

Follow the instructions on the next eight screens to create a block booking for many people.



Select the range of people.



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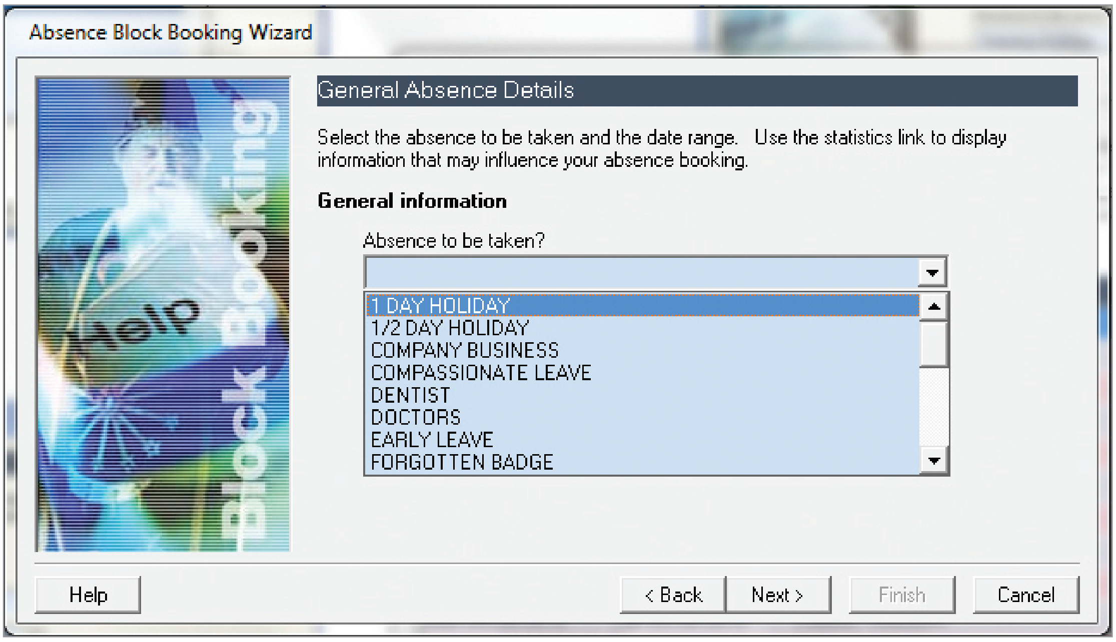
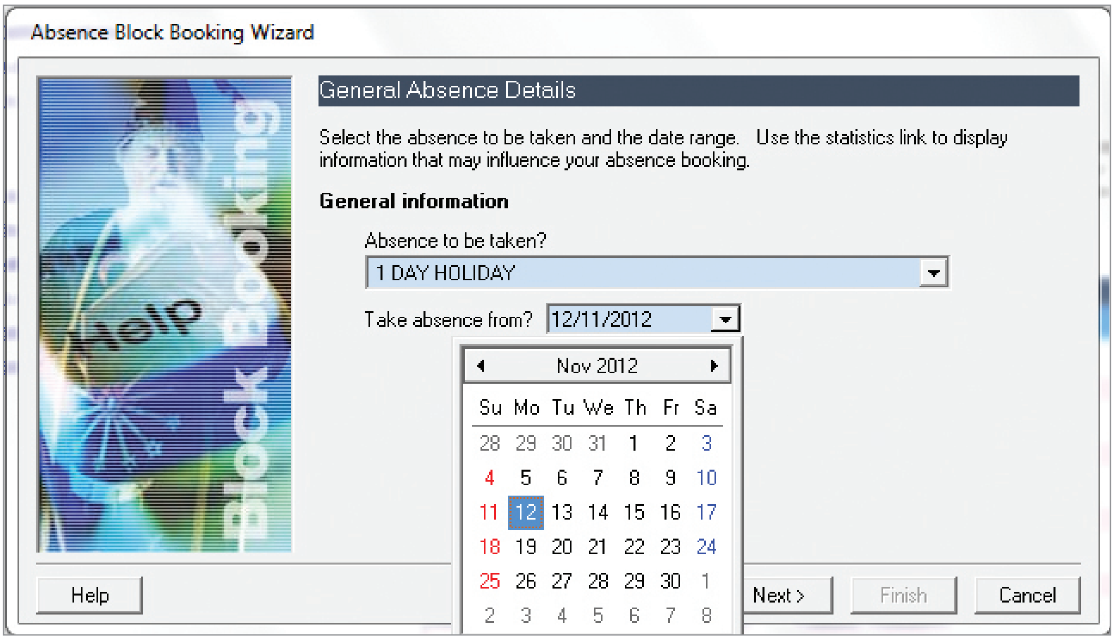
Next, select the absence to be taken.



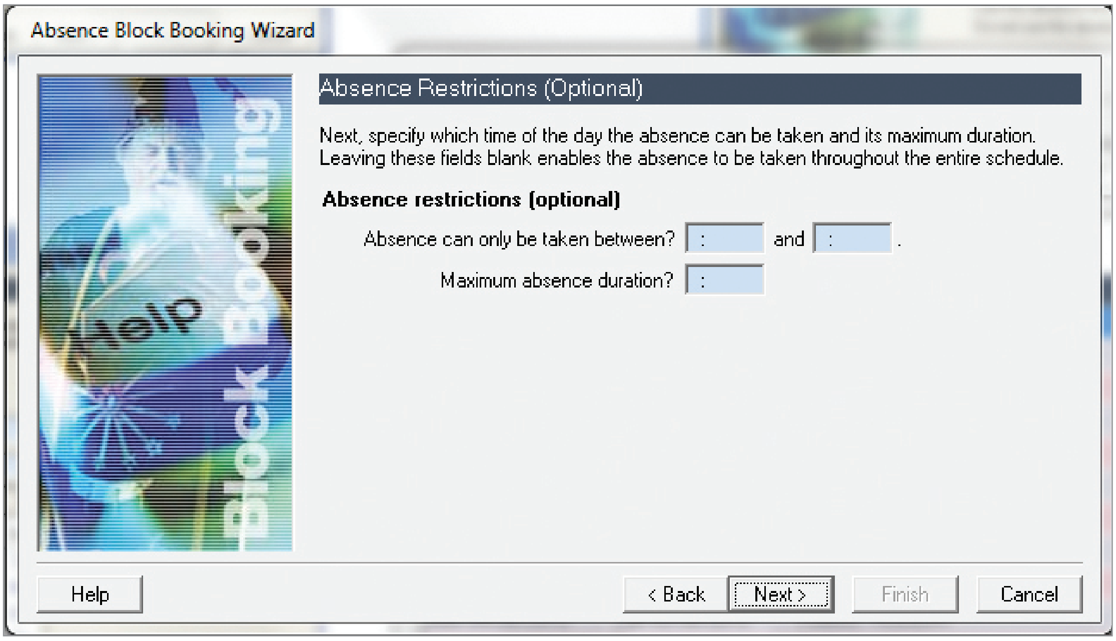
Now specify the date range (from and to).



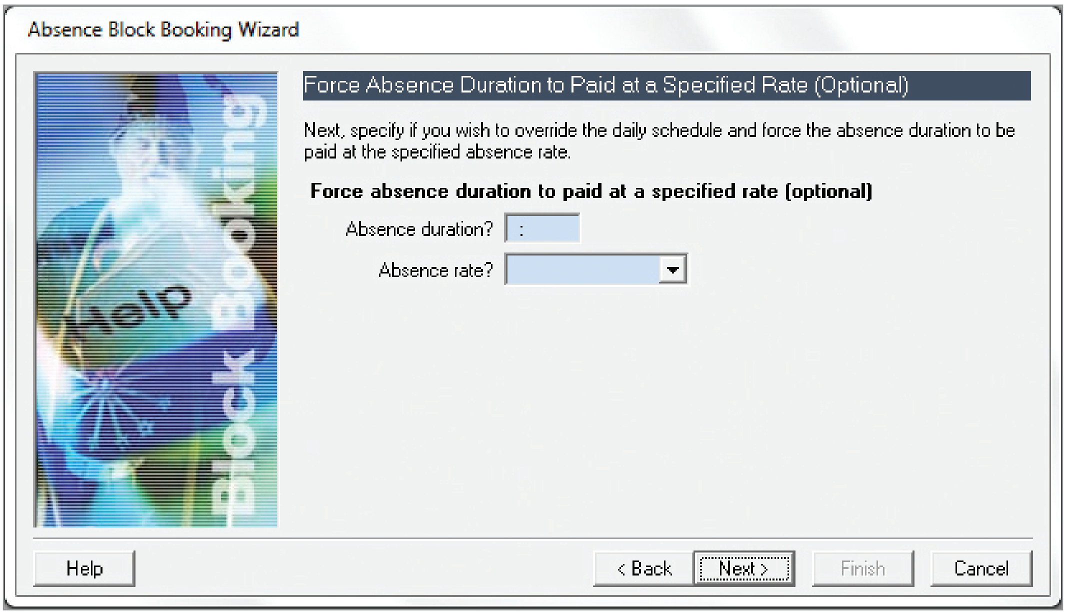
Include rest days? set to No

Can the absence be used to fill multiple gaps within the day? set to No

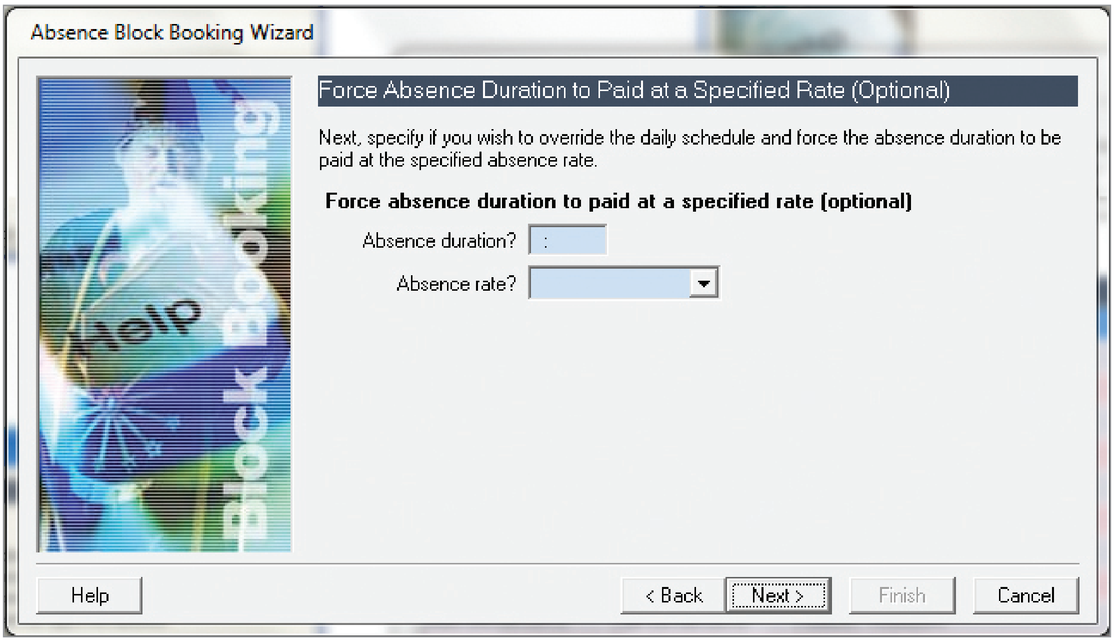
Do not use this absence if the absence is worked? set to No



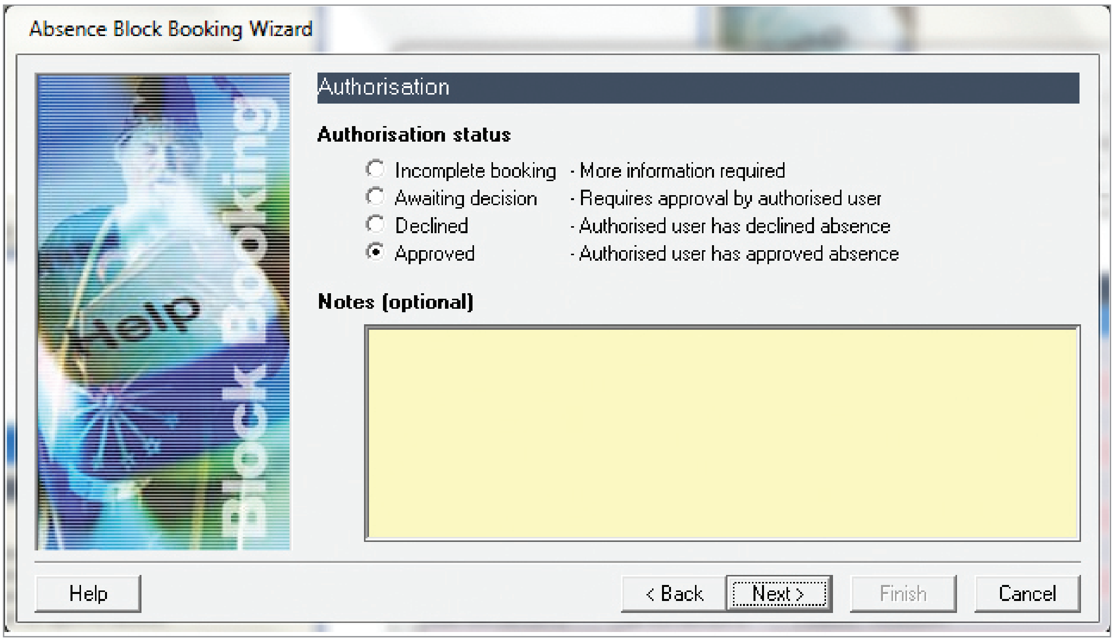
Leave the absence restrictions blank.



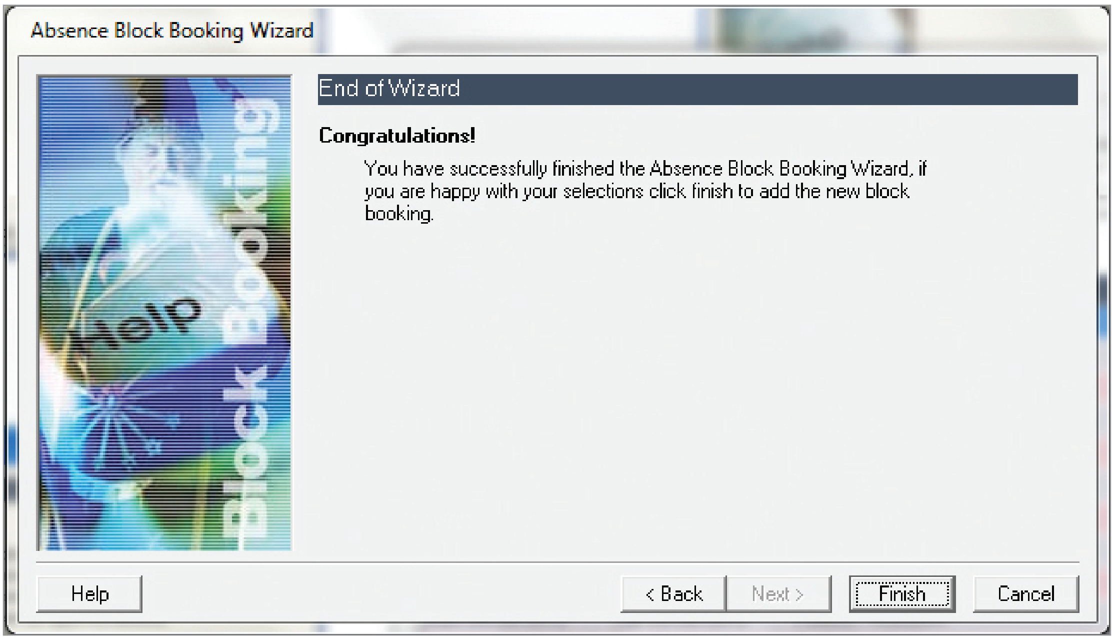
Leave the Force absence duration... fields blank.



Set the Authorisation status to Approved.



Finally, Press <Finish> and the block-booking will be saved by timeware, (but not yet allocated to the select people).



The block booking will be applied to all selected people during the next system maintenance event within the event handler. If the event handler is not running, the block booking will not be applied !

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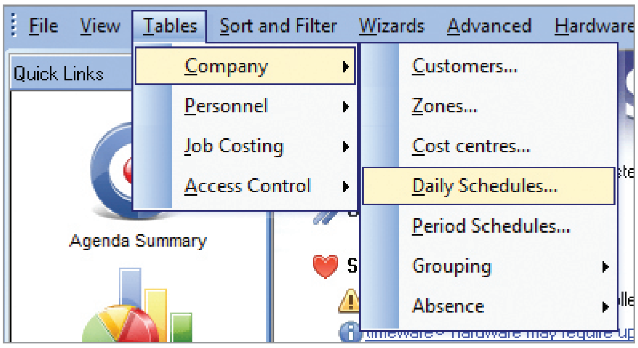
Module:

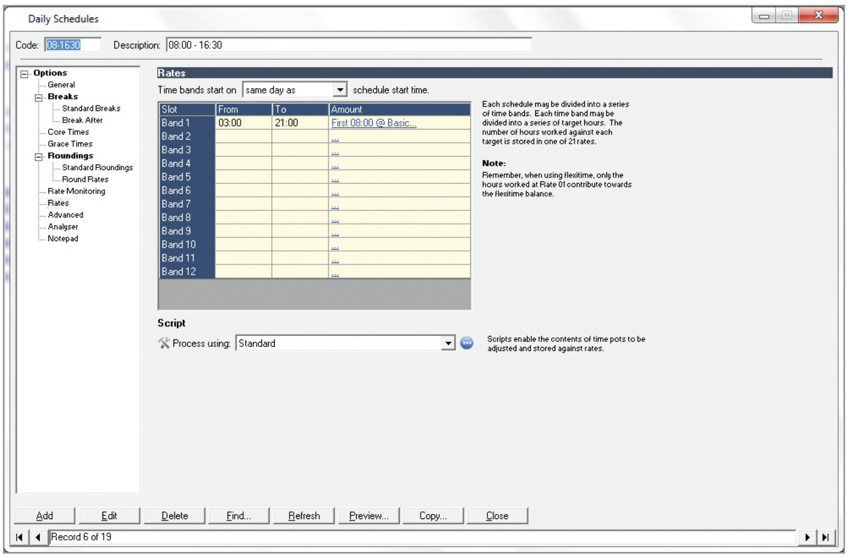
m/04/501
Preparing your timeware® system: Attendance

> The following module should be completed for every timeware® installation implementing attendance.

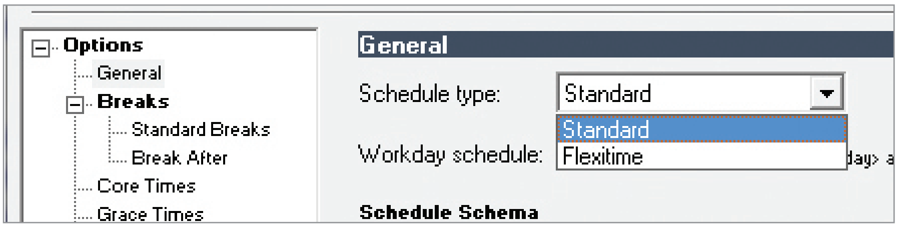
1. To prepare timeware® attendance daily schedules, select the Tables menu, Company, then Daily Schedules.



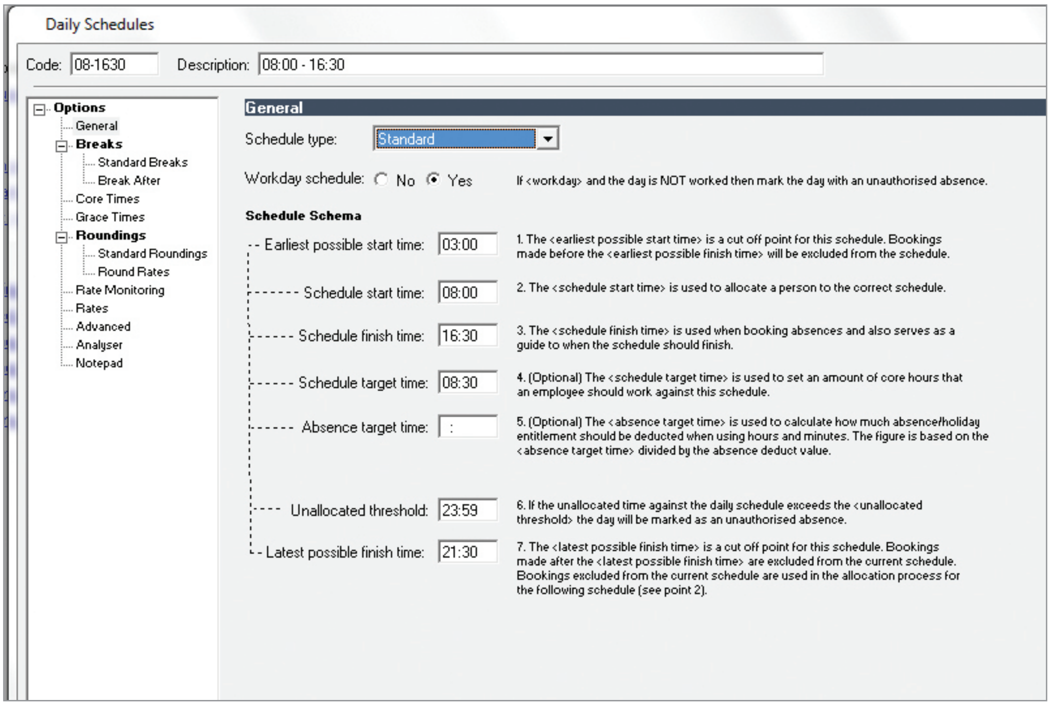
The daily schedule screen will appear.



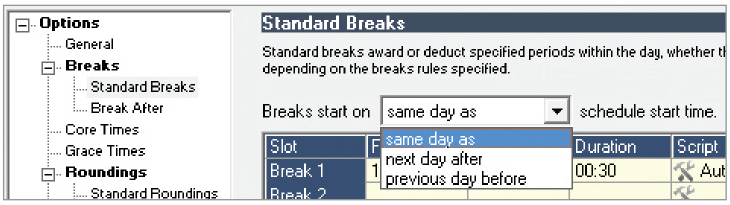
Click <Add>, enter a code and description and select the schedule type, (either standard or flexitime).



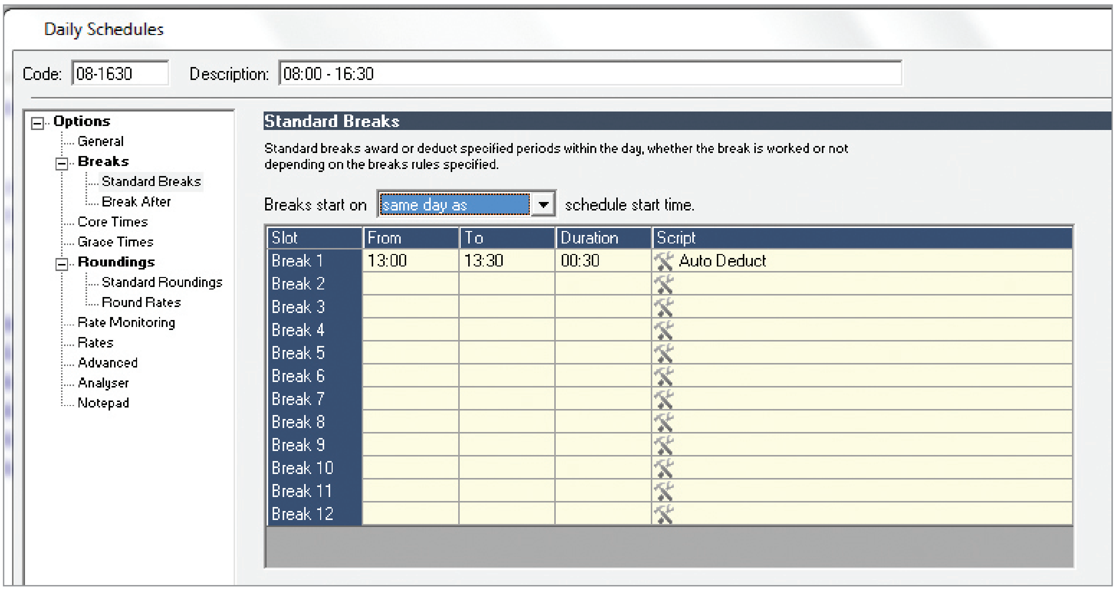
Next enter the earliest possible start time, the schedule start and finish times, the schedule target time and the latest possible finish time.



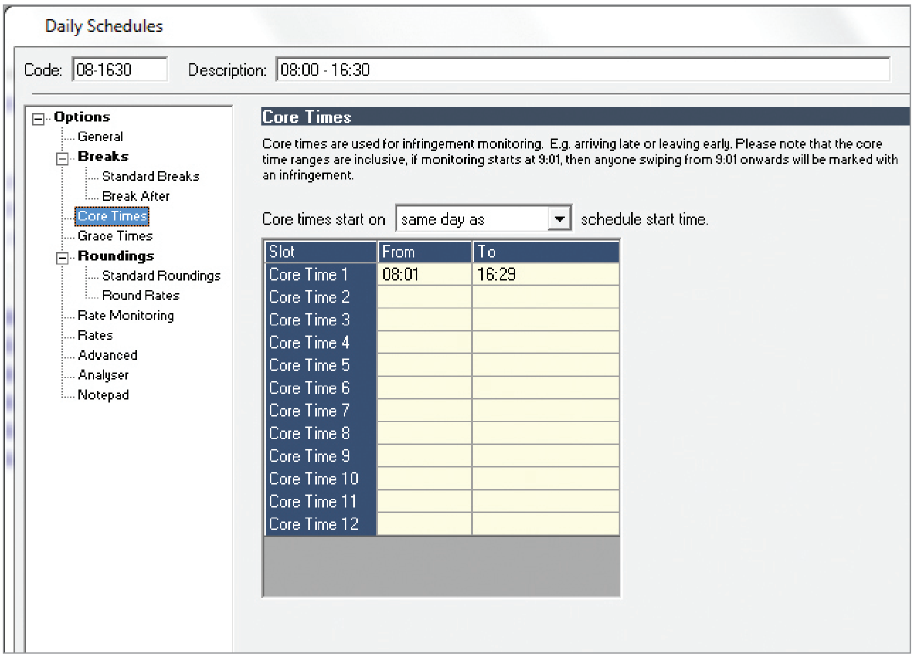
Next click on Standard Breaks and ensure that the 'Break start on the same day' is selected.



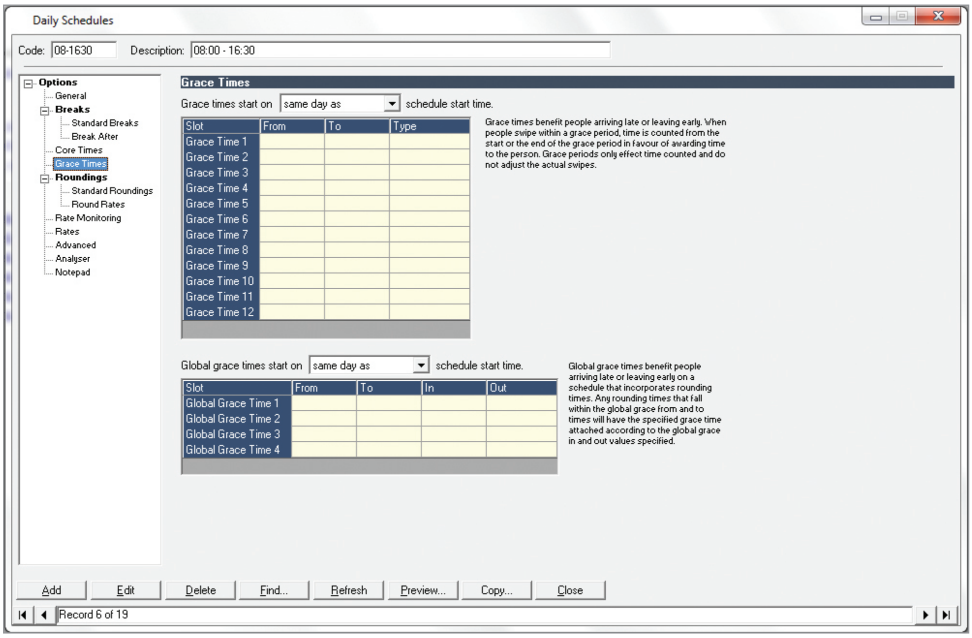
Create up to twelve breaks throughout the schedule.



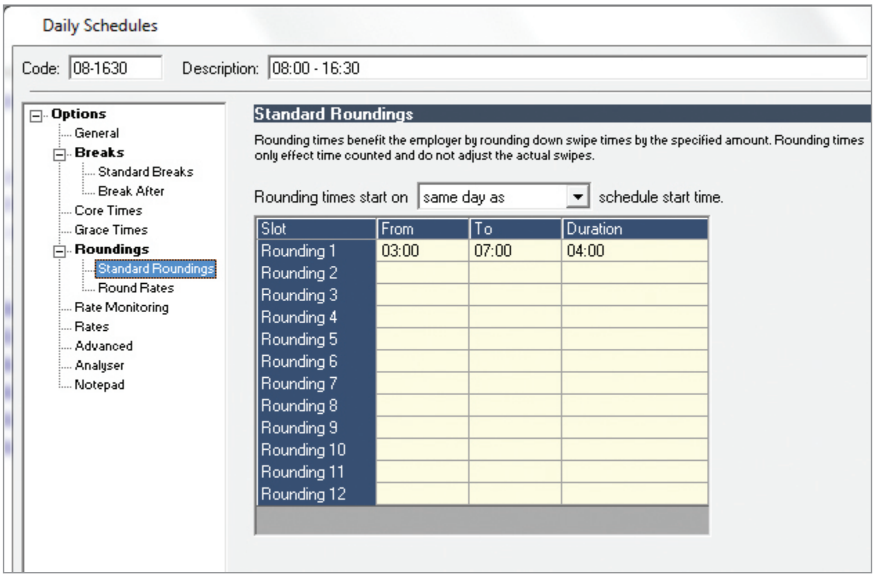
Next click on Core Times and create the core time bands for the schedule.



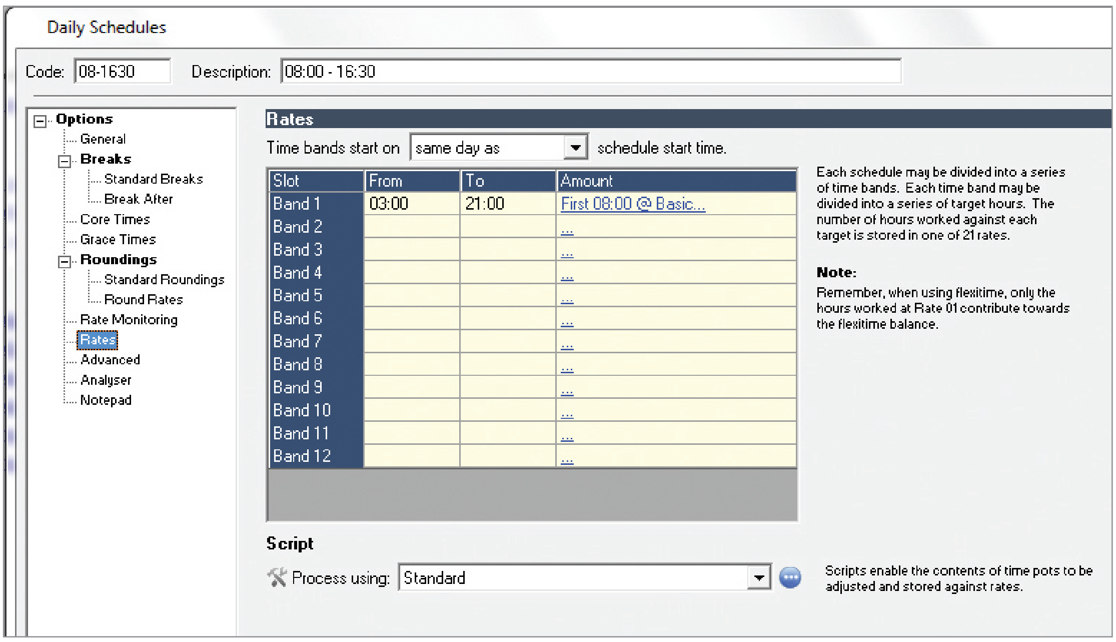
Now repeat the same process for the schedule grace times.



Next click on Standard Roundings and create the rounding bands for the schedule.

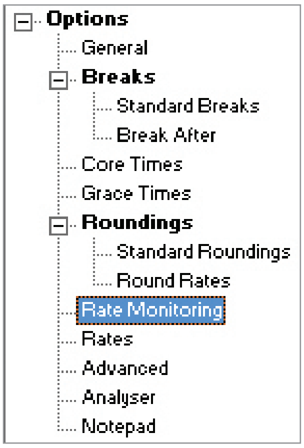


Now click on Time Pots and define how the hours worked are allocated to the 'Time Pots'.



Finally, select the daily schedule script that applies to this schedule.

Next, select the Rate Monitoring option:



Enter the maximum number of hours that may be worked at each rate before the daily schedule is highlighted for overtime authorisation.

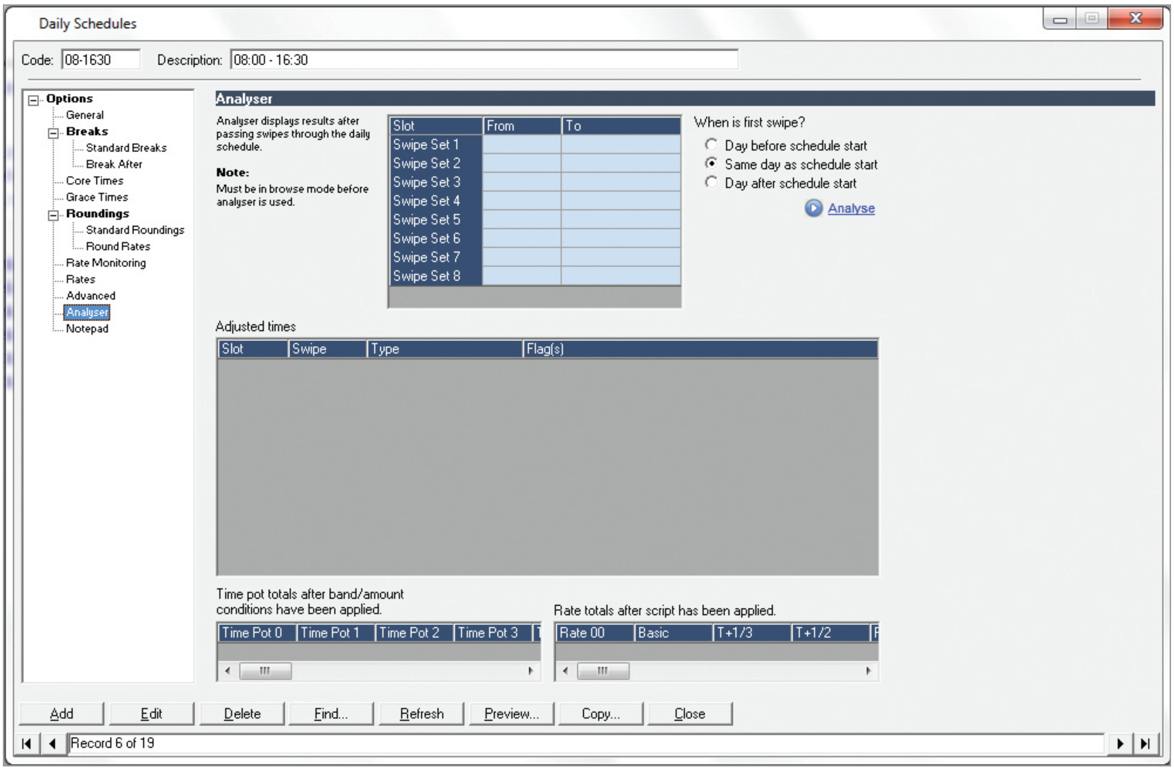
Rate Monitoring

This option is used to mark any rate that exceeds the threshold which may then require further investigation and /or authorisation.

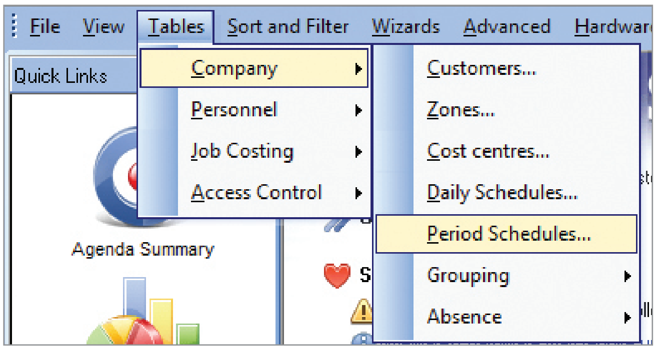
Rate	Threshold
Basic	07:00
T+1/3	01:00
T+1/2	
Rate 04	
Rate 05	
Rate 06	
Rate 07	
Rate 08	
Rate 09	
Rate 10	
Rate 11	
Rate 12	
Rate 13	
Rate 14	
Rate 15	
Rate 16	
Rate 17	
Rate 18	
Rate 19	
Rate 20	

Click on <Update> to save the record.

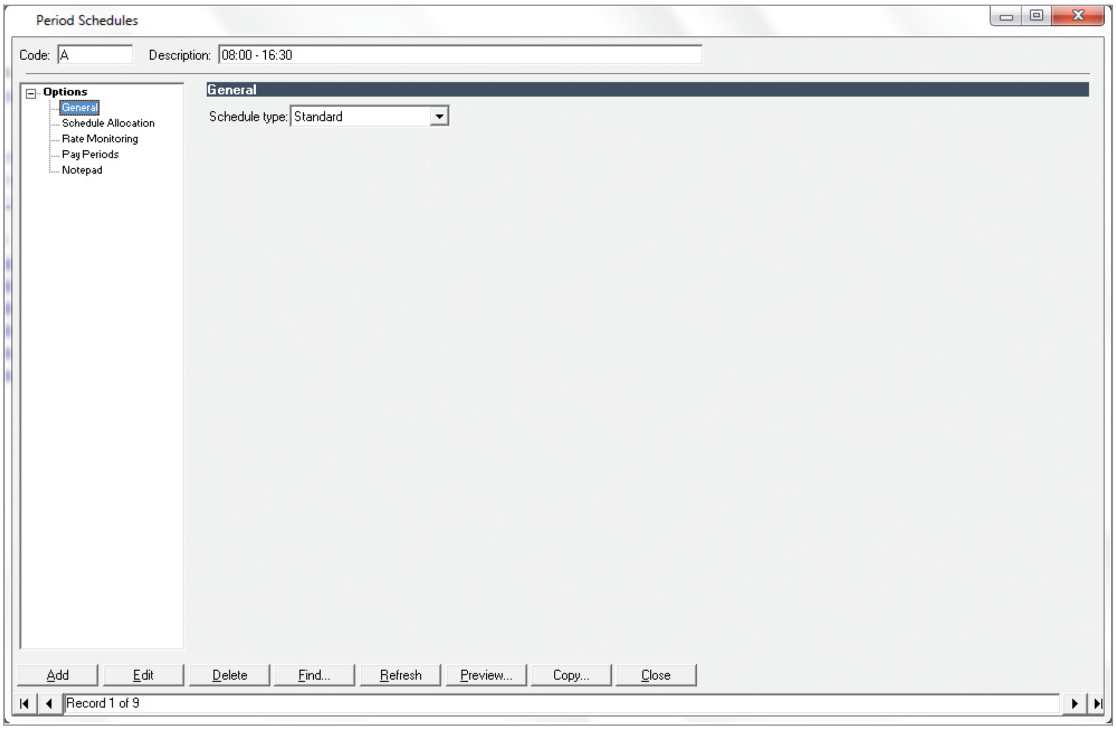
Finally, use the analyser option to test the schedule that you have created.



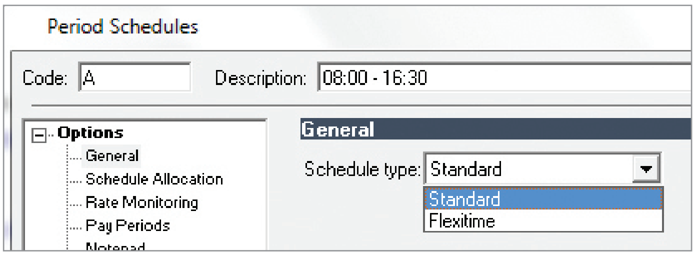
2. To prepare timeware® attendance period schedules, select the Tables menu, Company, then Period Schedules.



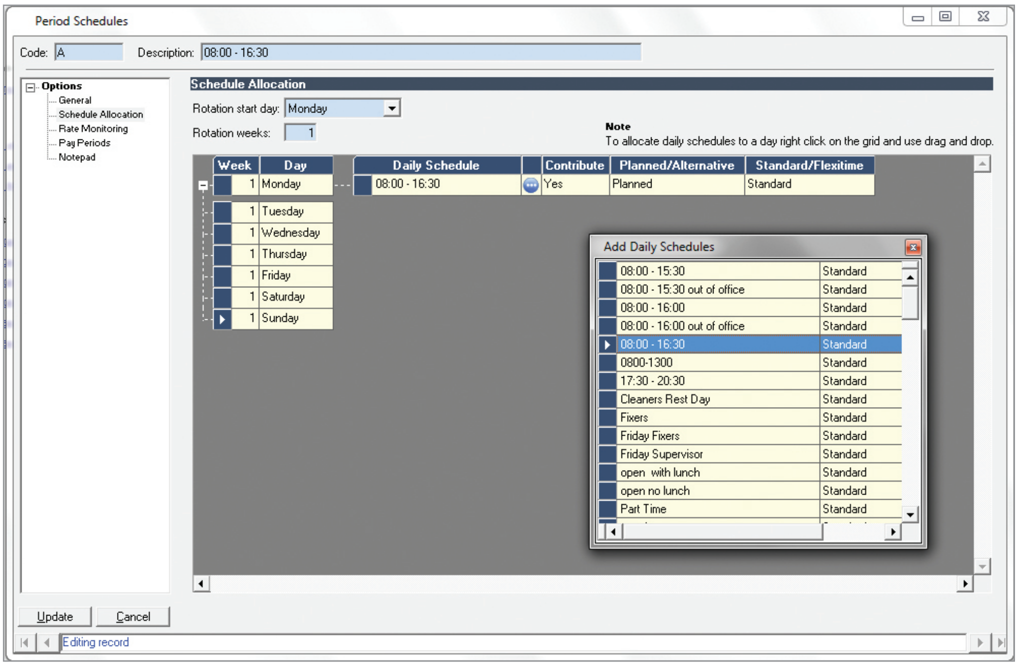
The period schedule screen will appear.



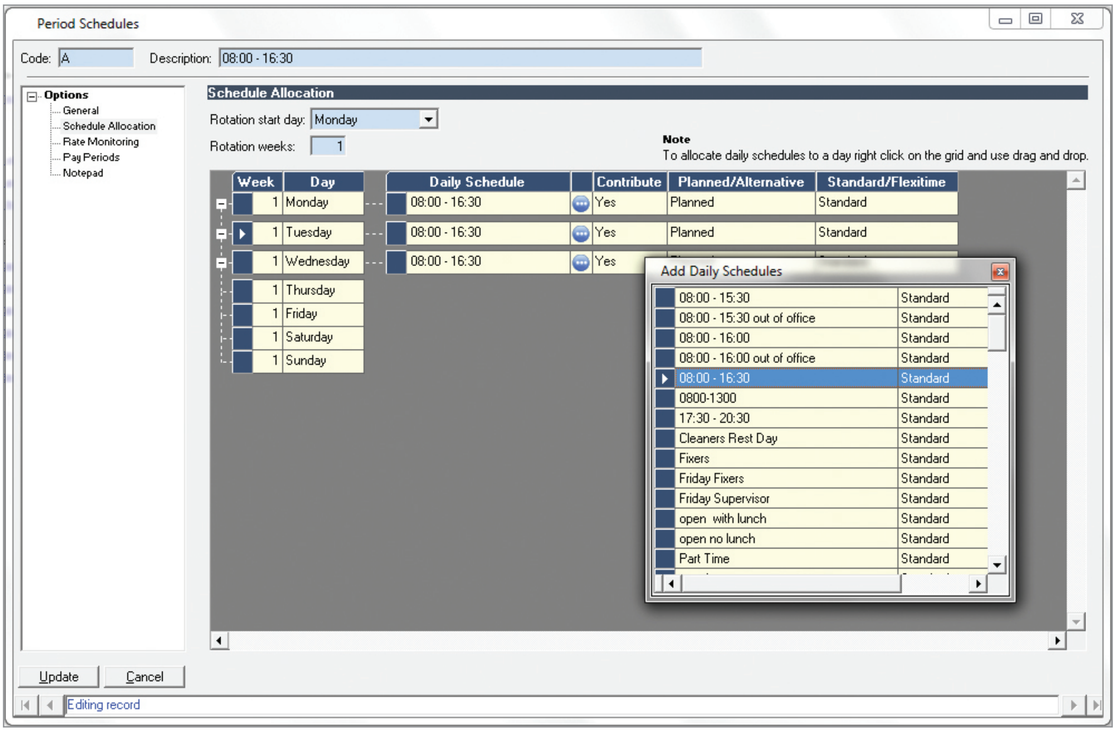
Click <Add> and enter a period code and description. Then select the schedule type (either standard or flexitime).



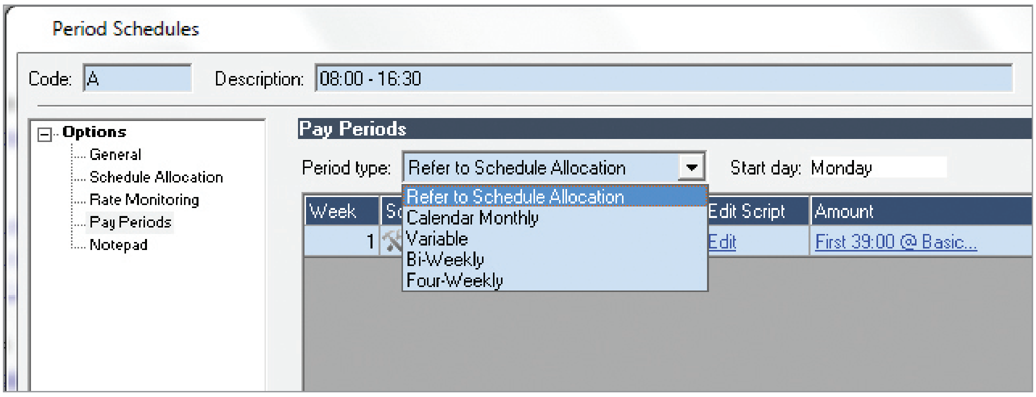
Next, select schedule allocation, <Right-click> on the grid and select Add Daily Schedules.



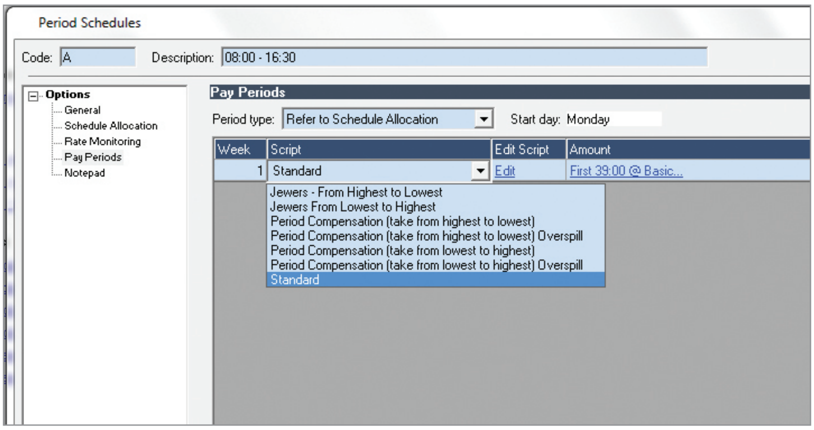
Drag the daily schedule and drop on the appropriate day.



Next, select Pay periods and choose a Period type.



Finally, select the period schedule script and click <Update>.



The period schedule has now been created is available to be linked to a personnel record (see module m/02/101 section 3).

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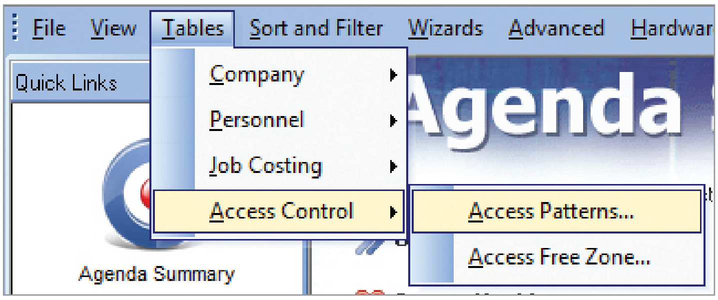
Module:

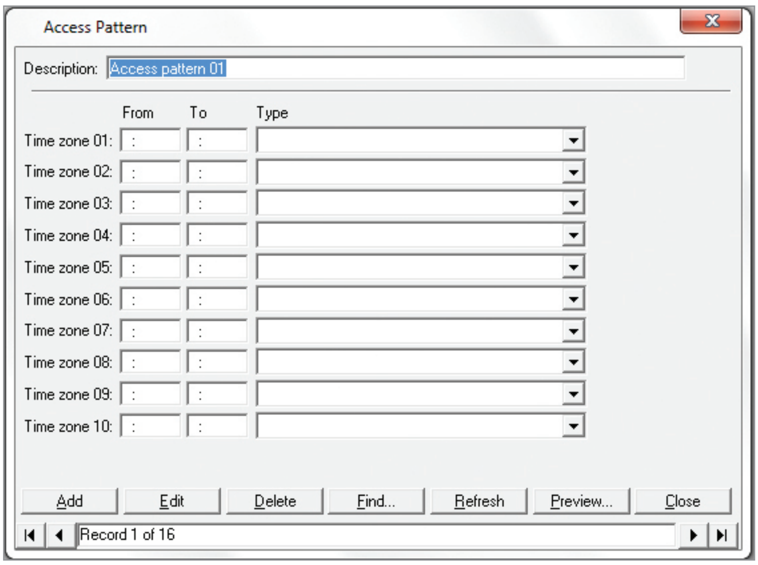
m/05/501
Preparing your timeware® system: Access control

The following module should be completed for every timeware® installation implementing access control.

1. To prepare timeware® Access control settings, select the Tables menu, Access Control, then Access Patterns.



Next, define the new access pattern.



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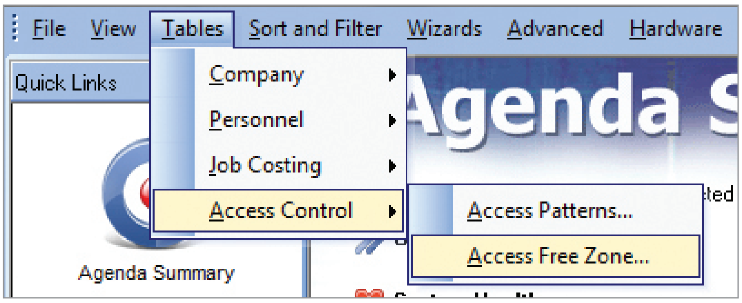
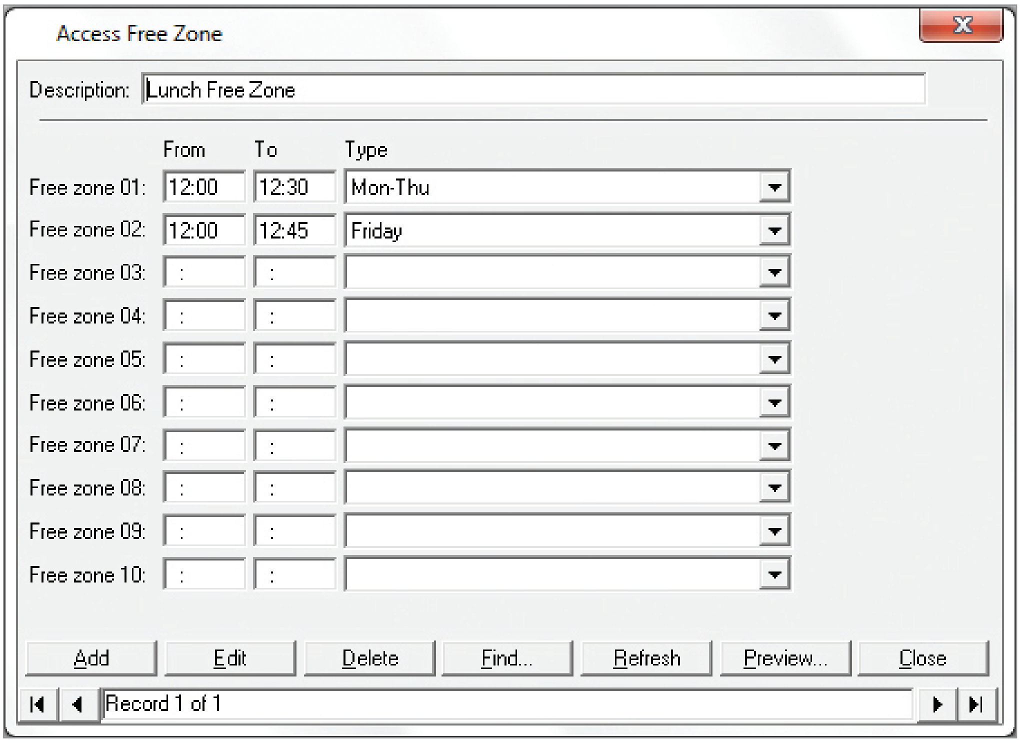
2. To prepare timeware® Access Free Zones, select the Tables menu Access Control, then Access Free Zone.



Click <Add> to create a new description and define up to 10 free zones.



Finally, click <Update> to save the free zone and return to the menu.

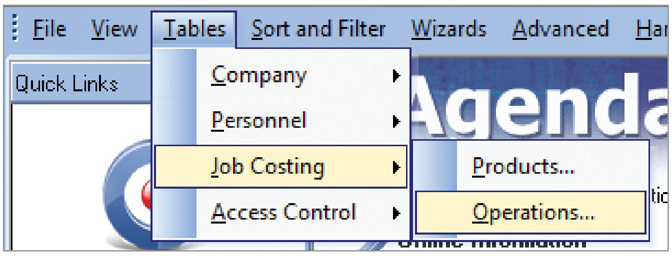
Module:

m/09/501
Preparing your timeware® system: Job costing

The following module should be completed for every timeware® installation implementing job costing.

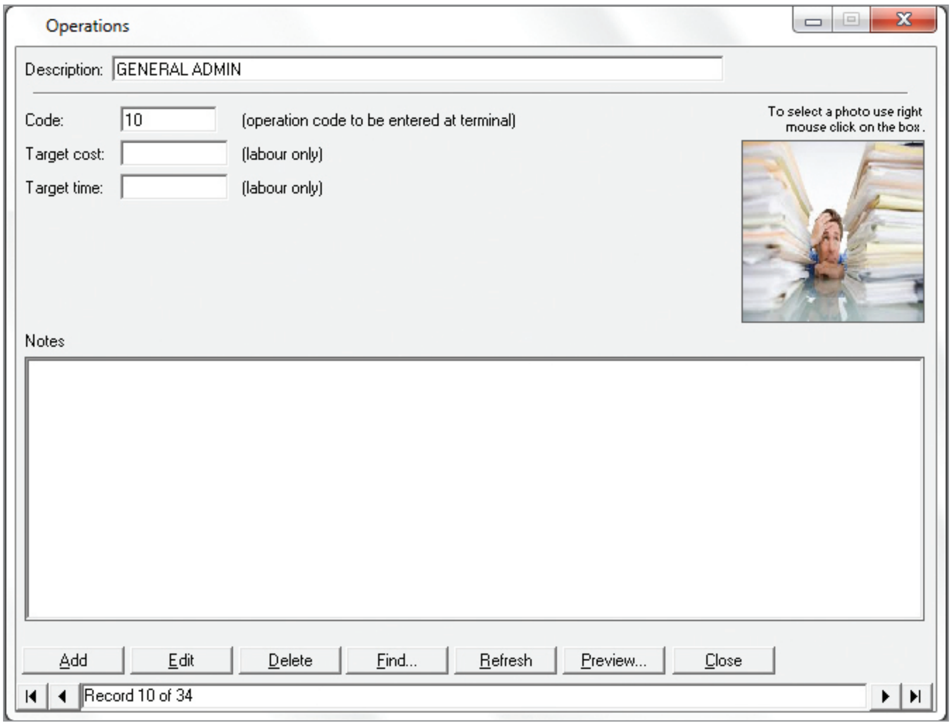
Remember that an operation is the smallest process that can be performed and that many operations make a product.

1. To prepare timeware® job costing operations, select the Tables menu, Job Costing, then operation..



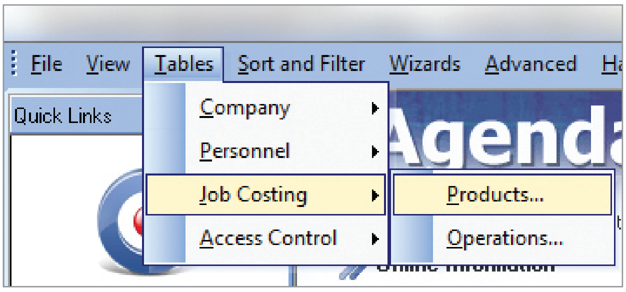
Next, create each required operation. Remember that the code defined against the operation is the code that must be selected when entering data at the shop floor data collection terminal.

The user may also specify a target cost and target time



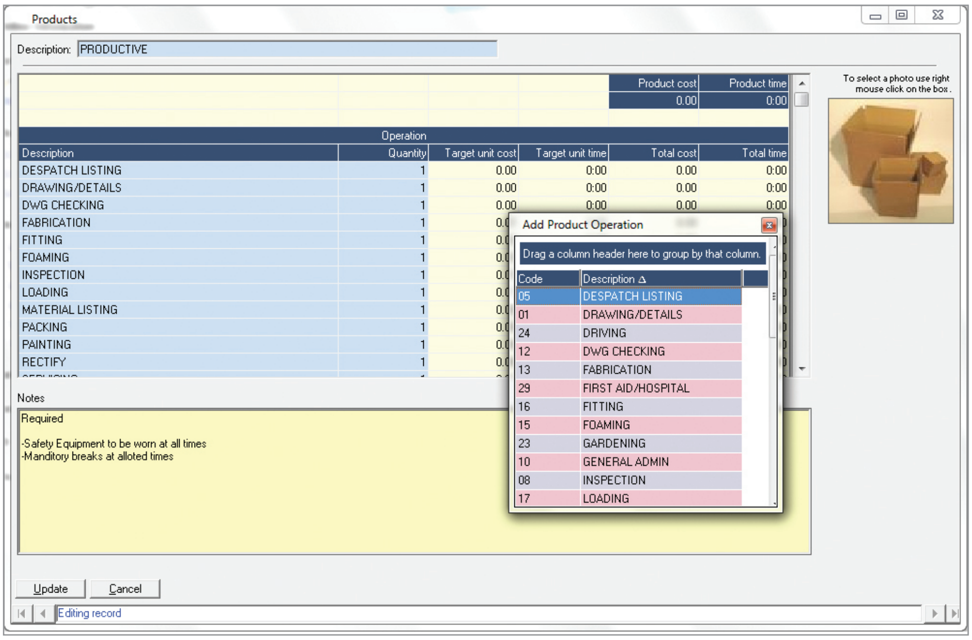
Click <Update> to save the operation and <Close> to return to the agenda.

2. To prepare timeware® job costing products, select the Tables menu, Job Costing, then Products.



Next, create each required product. Remember that a product may be made up from many different operations.

Add the operations and quantities, for example 'a chair leg * 4' and you will see the total cost and total time automatically recalculate.



Finally, click <Update> to save the product and <Cancel> to return to the agenda.

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