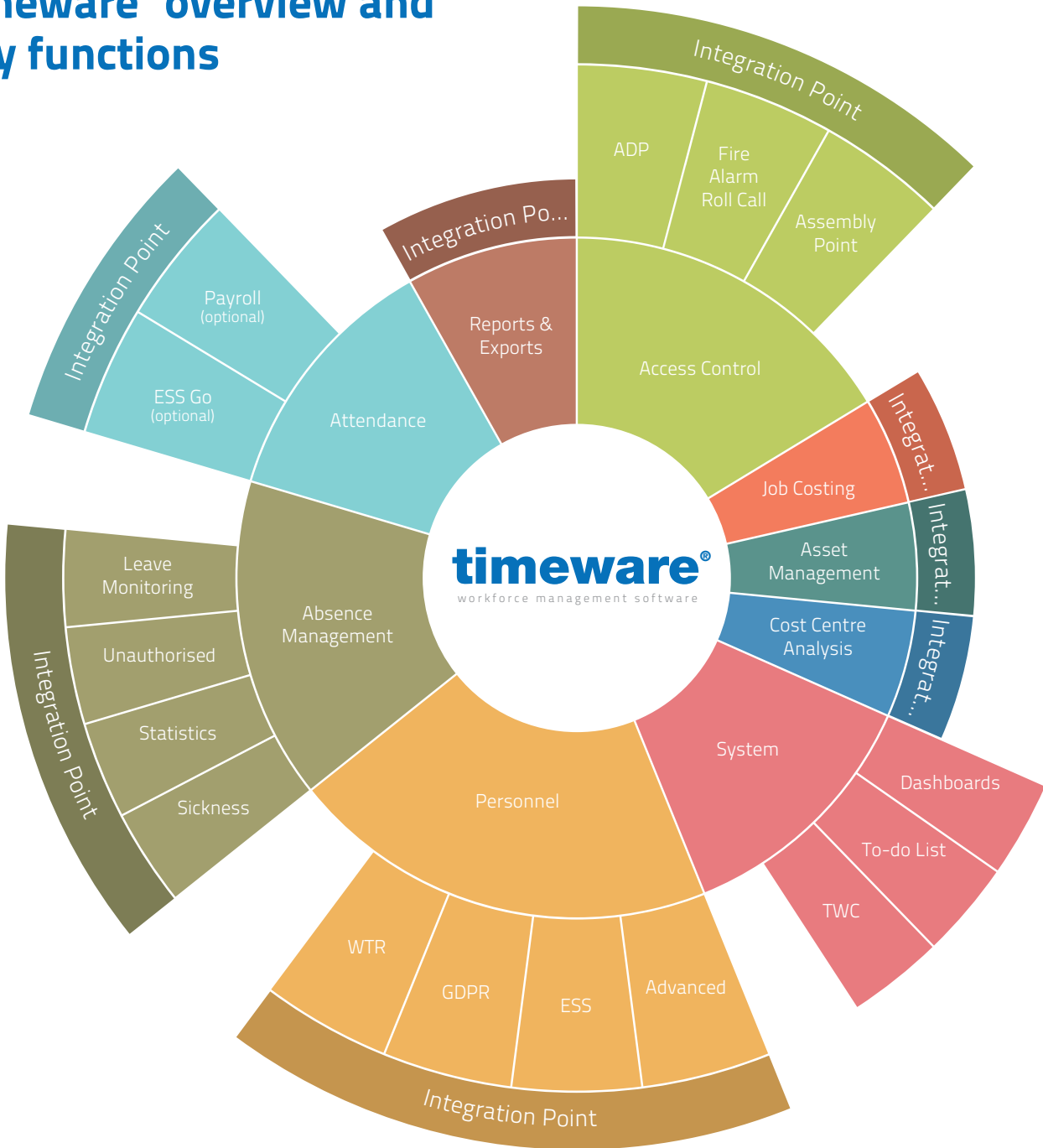


Training guide: timeware® overview and key functions



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.

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Contents

Module	Description
m/01/501	Preparing your timeware [®] system: Company
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m/03/501	Preparing your timeware [®] system: Absence management
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m/05/501	Preparing your timeware [®] system: Access control
m/09/501	Preparing your timeware [®] system: Job costing

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

Module:

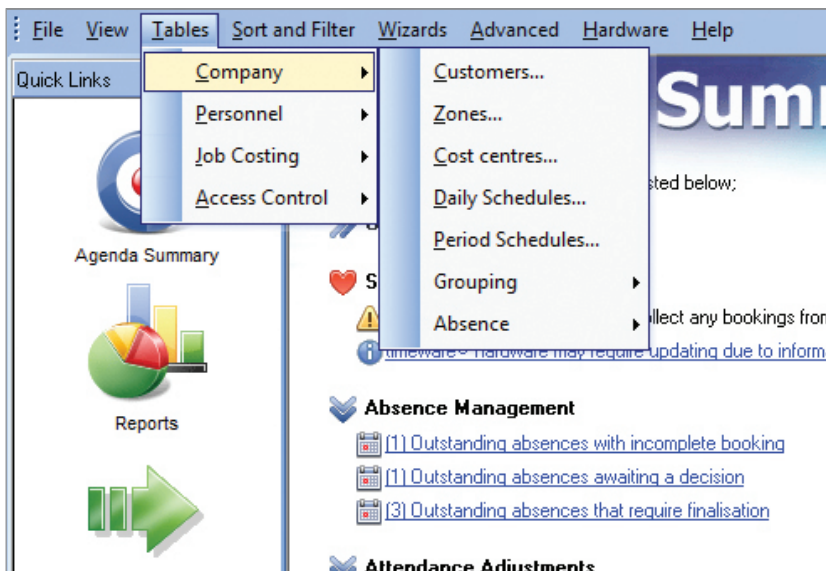
m/01/501

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.




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

The screenshot shows a 'Customers' form with the following fields:

- Name: [Text Field]
- Street 1: [Text Field]
- Street 2: [Text Field]
- Town: [Text Field]
- County: [Text Field]
- Post code: [Text Field] with a globe icon (world symbol)
- Country: [Text Field]
- Telephone: [Text Field]
- Fax: [Text Field]
- Email: [Text Field] with a globe icon
- Website: [Text Field] with a globe icon
- Contact (1):** [Text Field]
- Telephone: [Text Field]
- Fax: [Text Field]
- Email: [Text Field] with a globe icon
- Contact (2):** [Text Field]
- Telephone: [Text Field]
- Fax: [Text Field]
- Email: [Text Field] with a globe icon

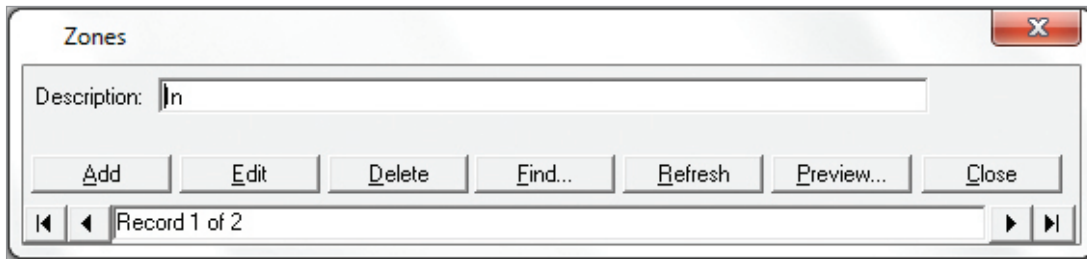
Buttons at the bottom: Add, Edit, Delete, Find..., Refresh, Preview..., Close.

Status bar: Record 0 of 0

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.



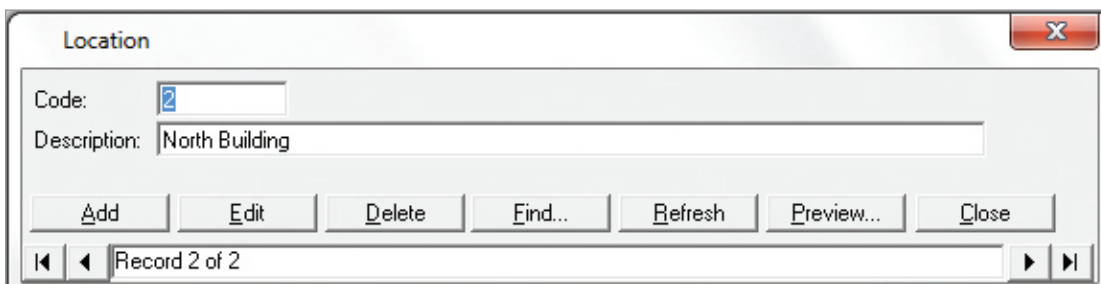
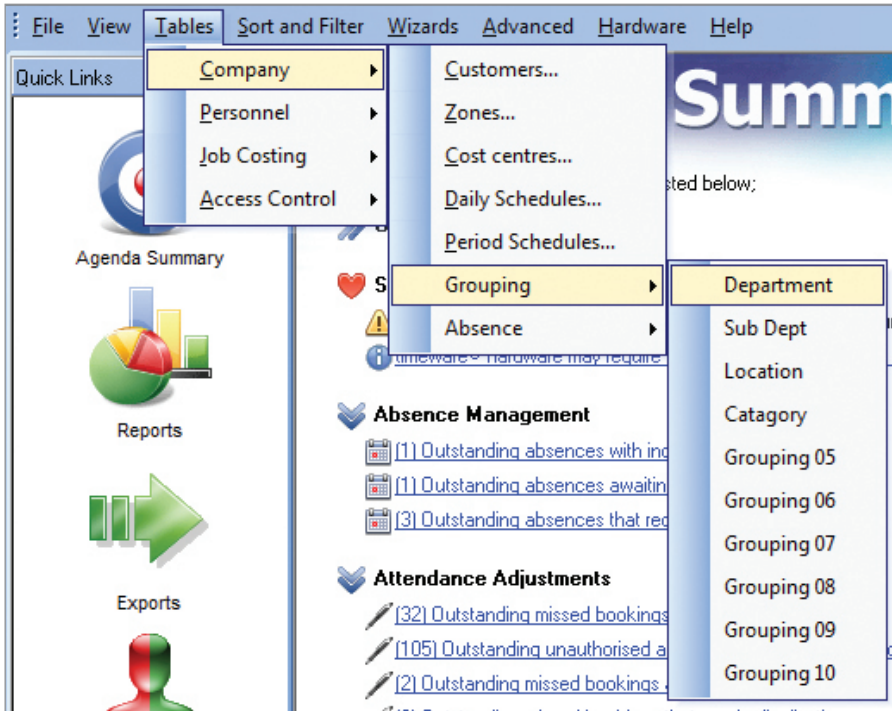
There are two pre-defined Zones:

- 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.

- 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.

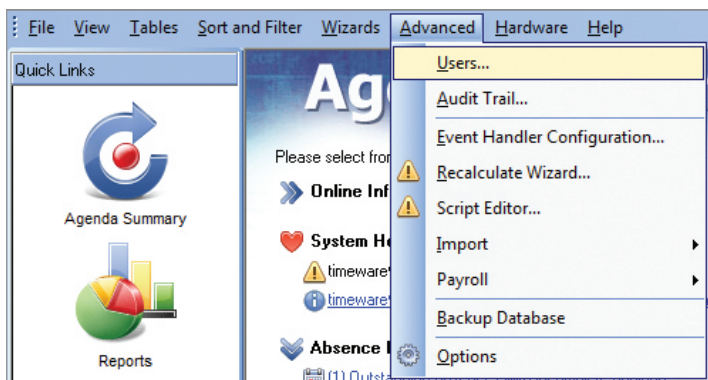


There are no pre-defined Groupings:

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...

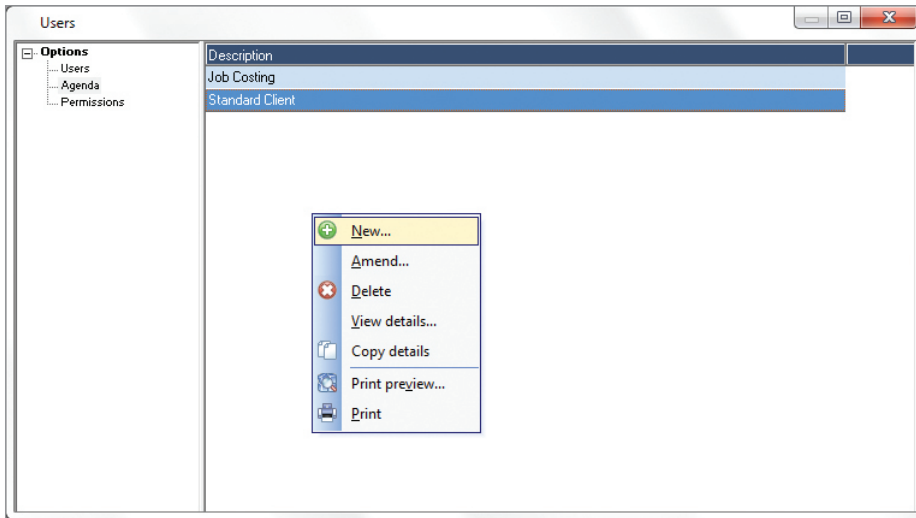


Select Advanced then click Users...

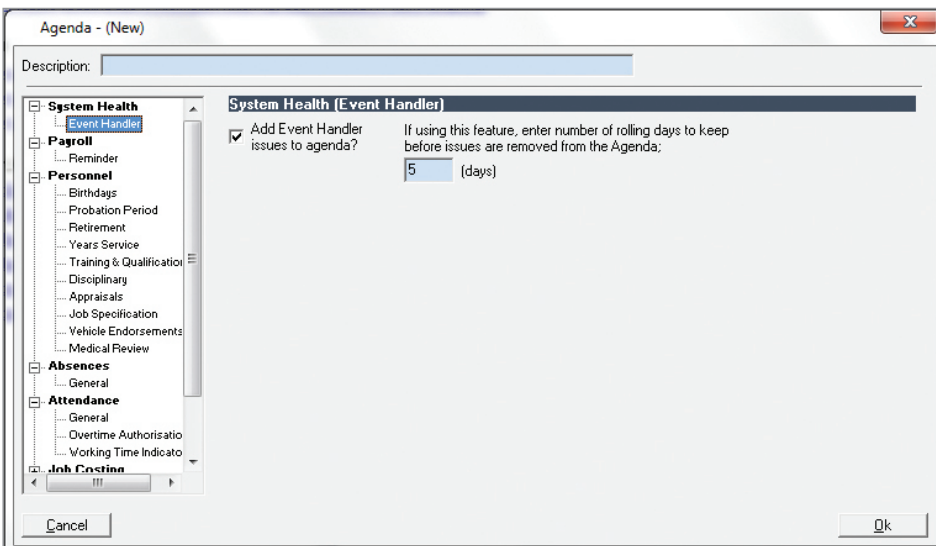
The screenshot shows a window titled 'Users' with a table of user profiles. The table has four columns: 'User Name', 'Description', 'Status', and 'Logged'. The rows are color-coded: red for 'Logged off' and green for 'Logged on'. The 'Logged' column contains dates for the 'Logged on' entries.

User Name	Description	Status	Logged
Admin		Logged on	12/11/2
Adp		Logged off	
Ben Chowdhary		Logged off	
Calculation Agent		Logged on	25/07/2
Client		Logged off	
Colin Albone		Logged off	
Dave Primett		Logged off	
David Irwin		Logged on	15/08/2
Email Agent		Logged off	
Event Handler		Logged on	25/07/2
Fire Roll Call		Logged off	
Lorraine Leuty		Logged off	
Mark Salmon		Logged on	15/08/2
Paul Kell		Logged off	
Philip Taylor		Logged off	
Pip		Logged on	12/11/2
roy		Logged off	
Roy Anderson		Logged off	
Steve Boxall		Logged on	15/08/2

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

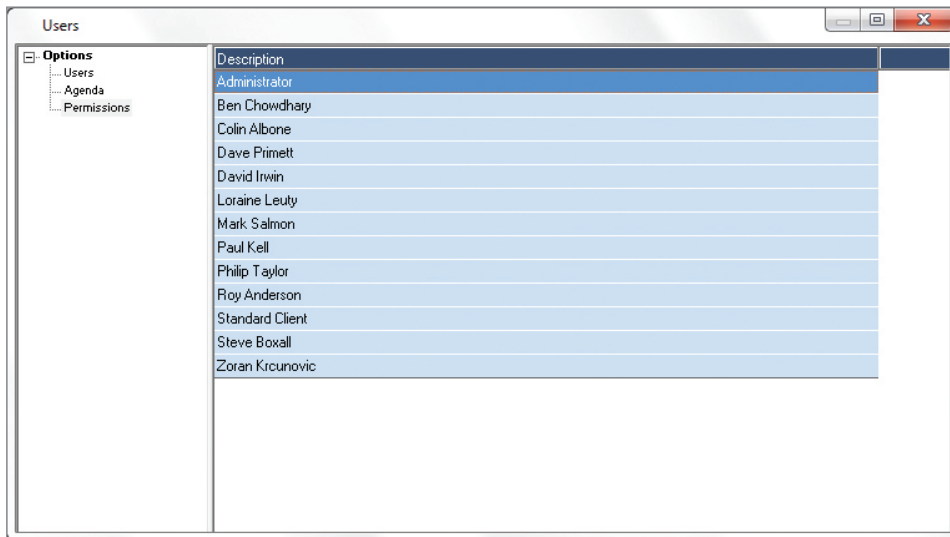


Move through the various headings on the left to determine whether they should be included in the User's agenda.

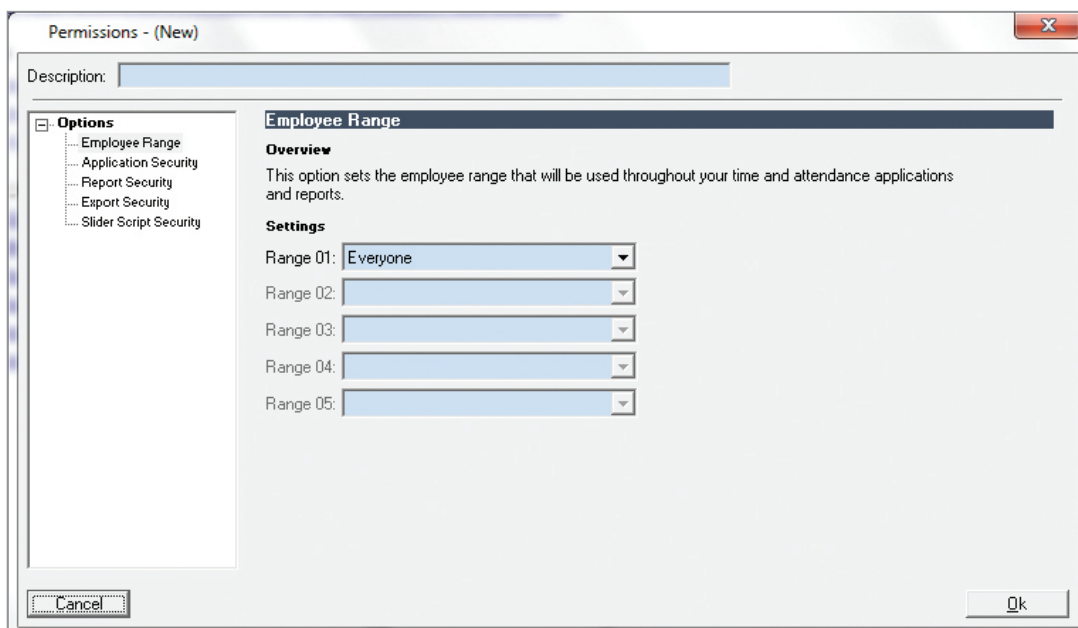


Finally, click <Ok> to save the new Agenda and return to the User screen.

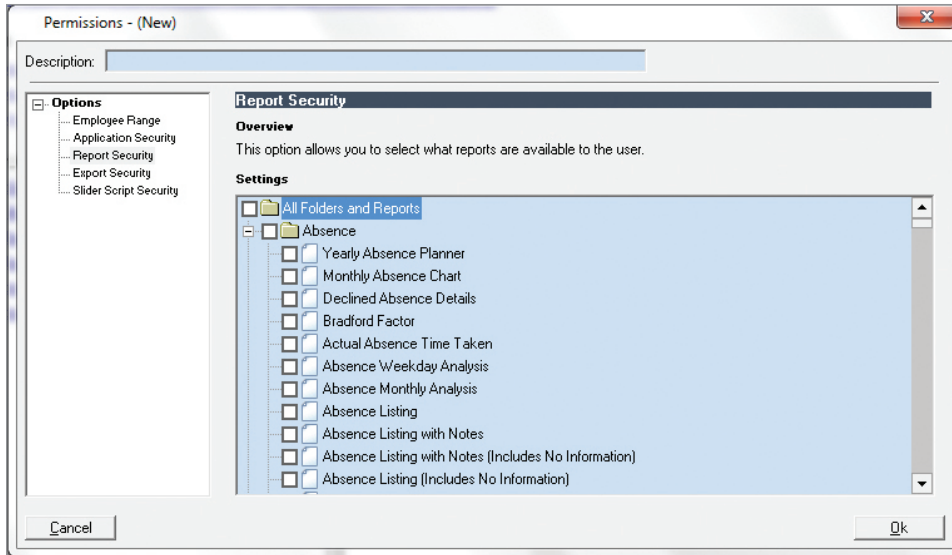
Next, create a Permissions profile for the User.



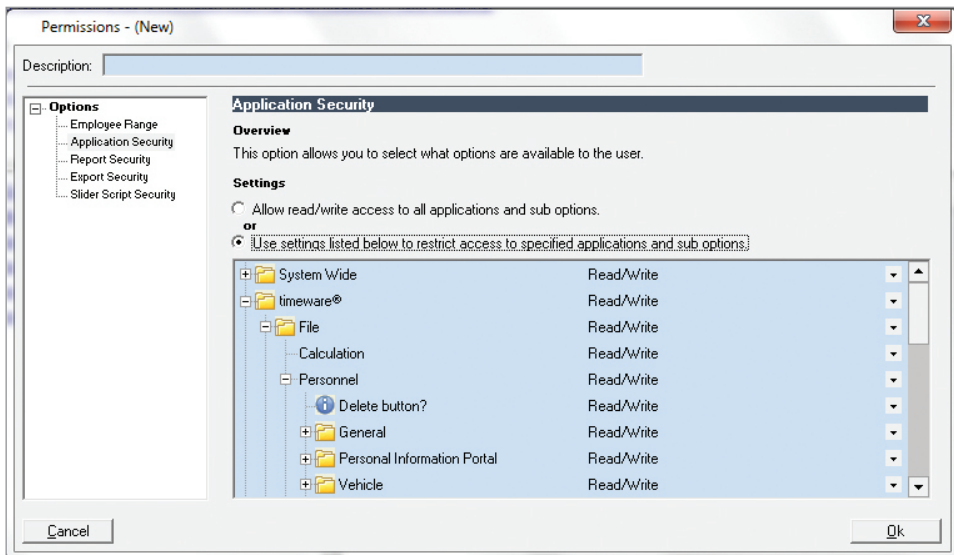
Select the Employee range that this user will be able to see.



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



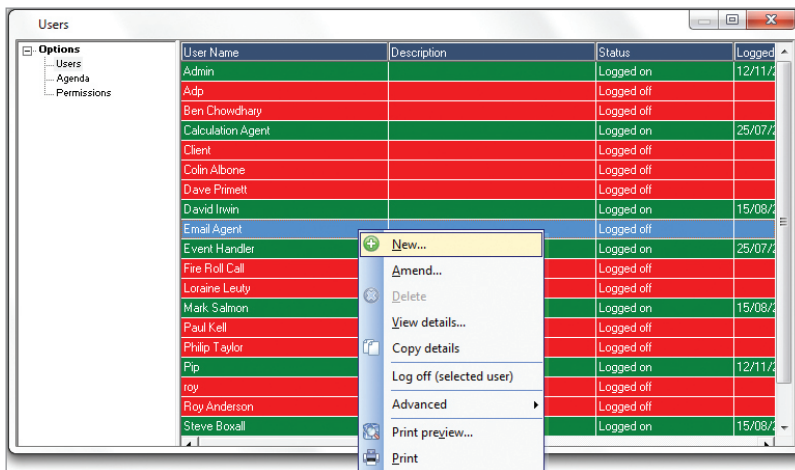
Finally, select Application security and specify which options the user may access and whether they have read/write or view only capabilities.



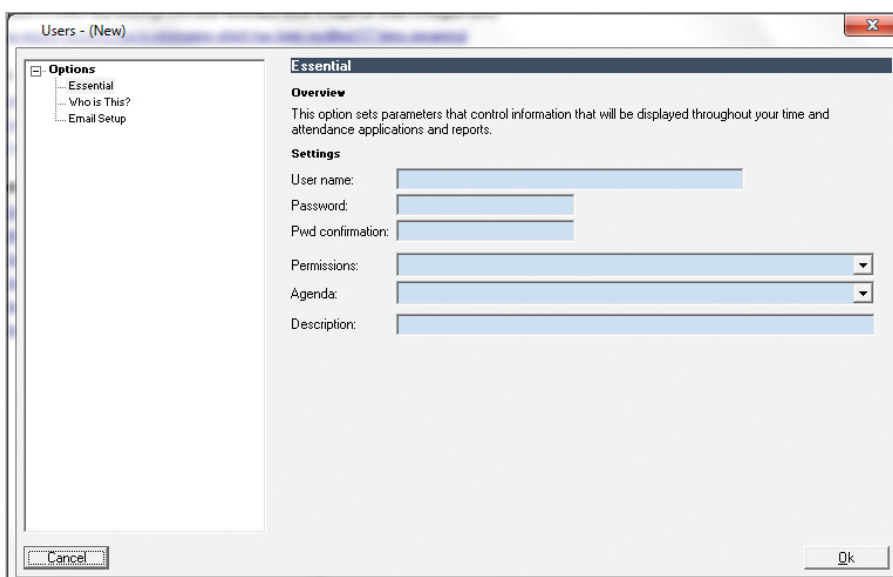
Finally, click <Ok> to save the new Permission and return to the User screen.

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...

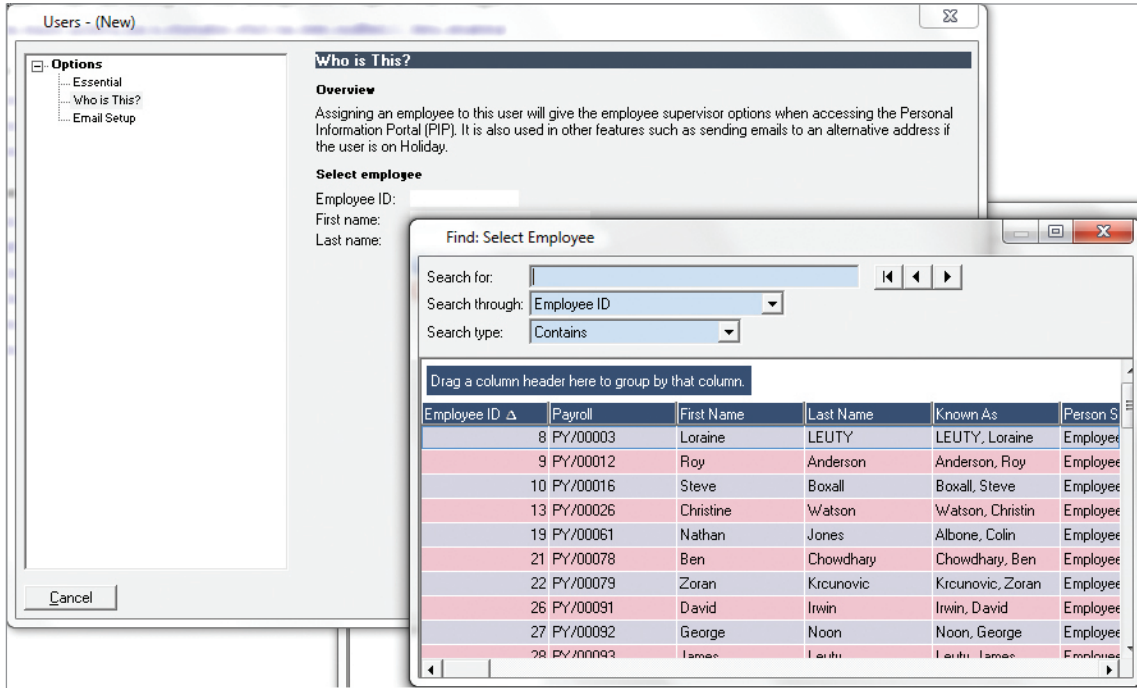


Next enter the Essential information including User Name and password (the details that are used when logging in). Now allocate a Permission policy, an Agenda and a brief description.



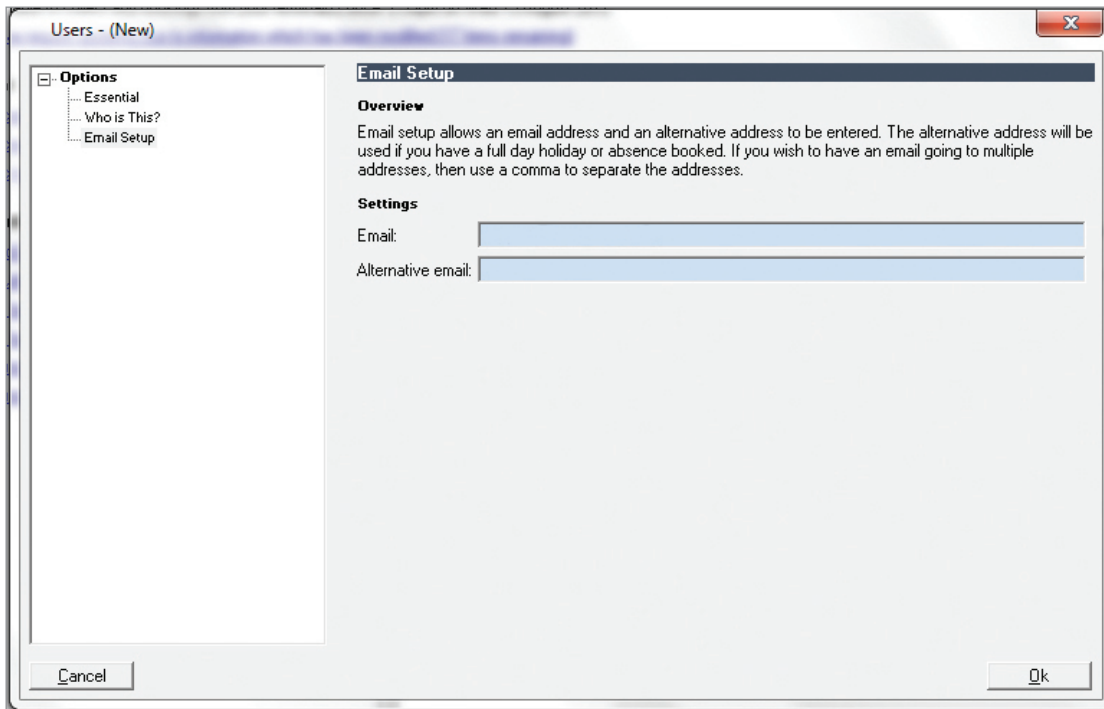
Next click 'Who is This?' and select the user from the personnel list.

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.

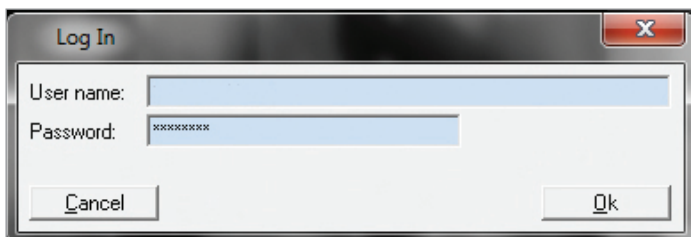
Select Option, Email Setup and enter an Email address (and alternative Email) for the User.



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:

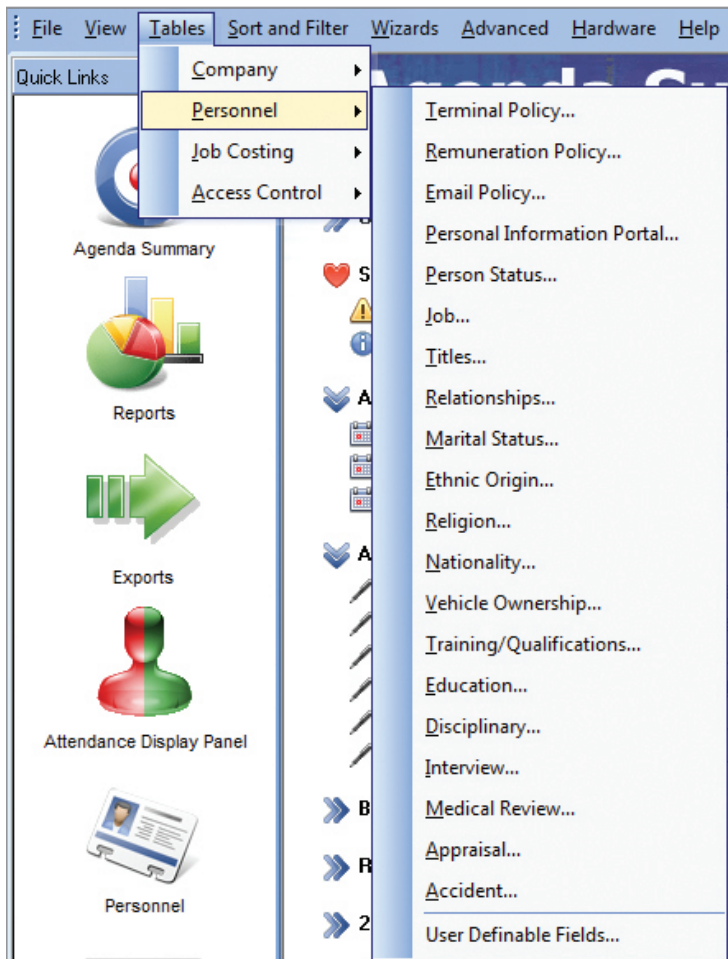
m/02/501

Preparing your timeware® system: Personnel

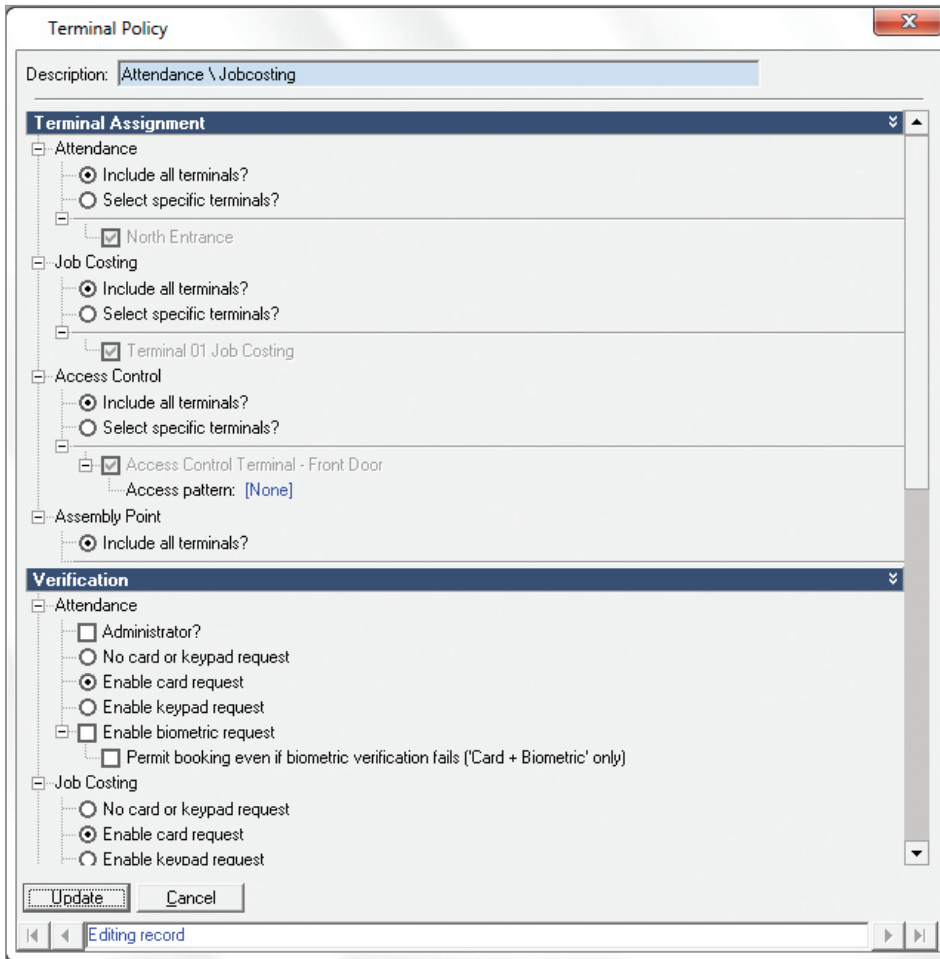


The following module should be completed for every timeware® installation.

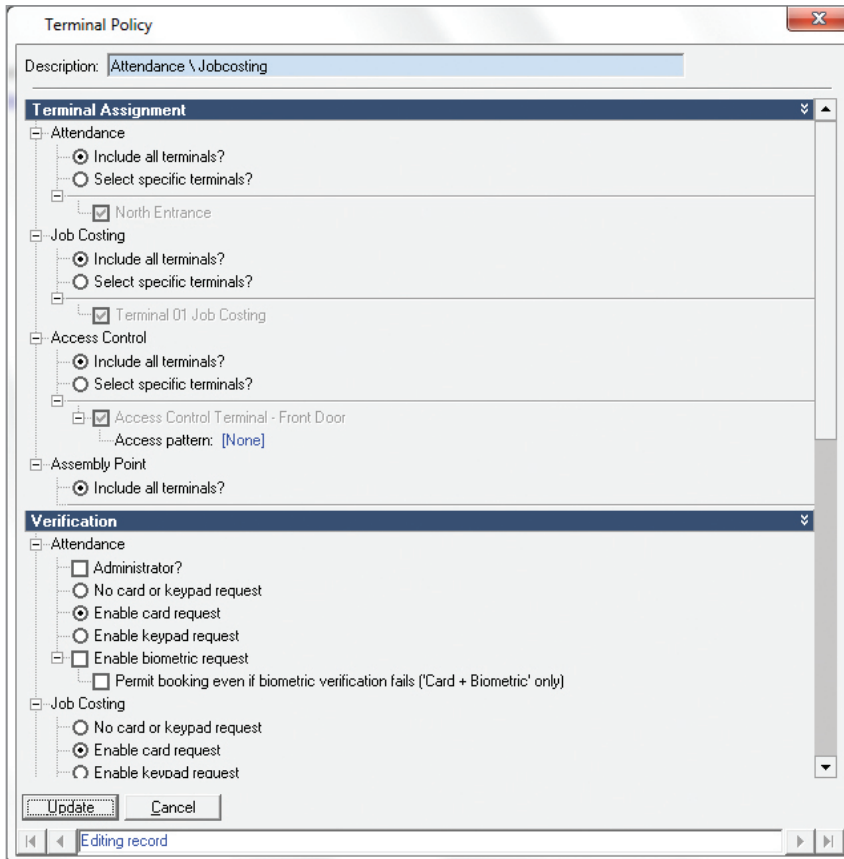
1. To prepare timeware® personnel, select the Tables menu then Personnel.



- 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:

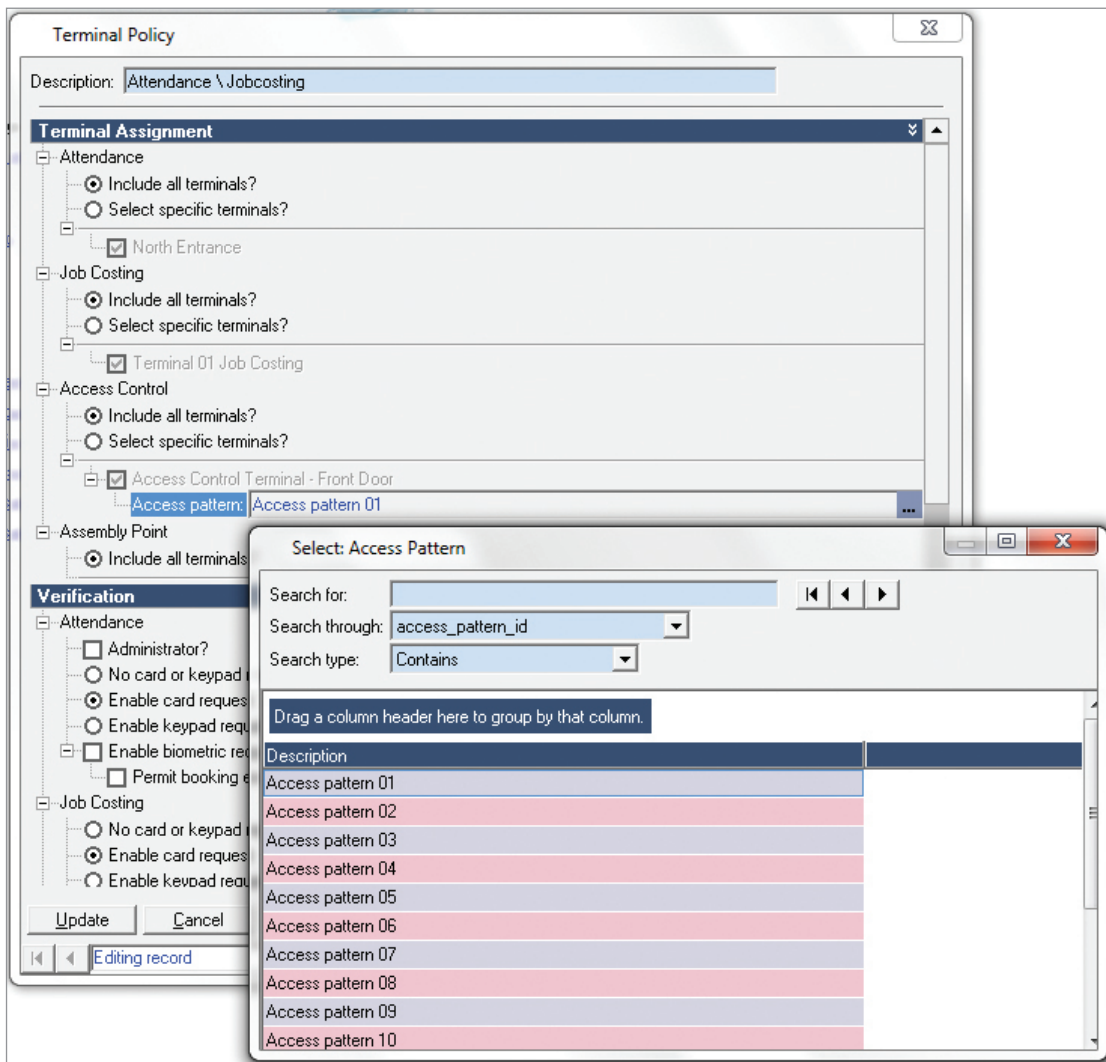
- a.** Biometric (disallow failures)
- b.** Biometric (allow failures)
- c.** Card/fob
- d.** Keypad

Additional policies may be added by the user.

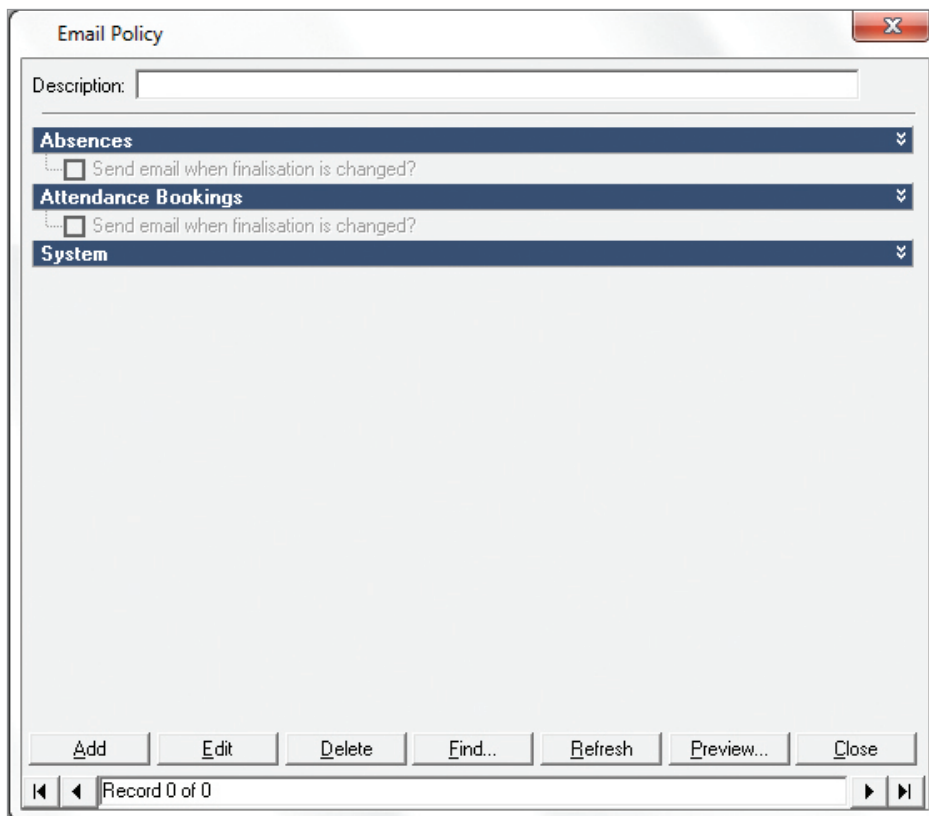
Special notes for access terminals

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.



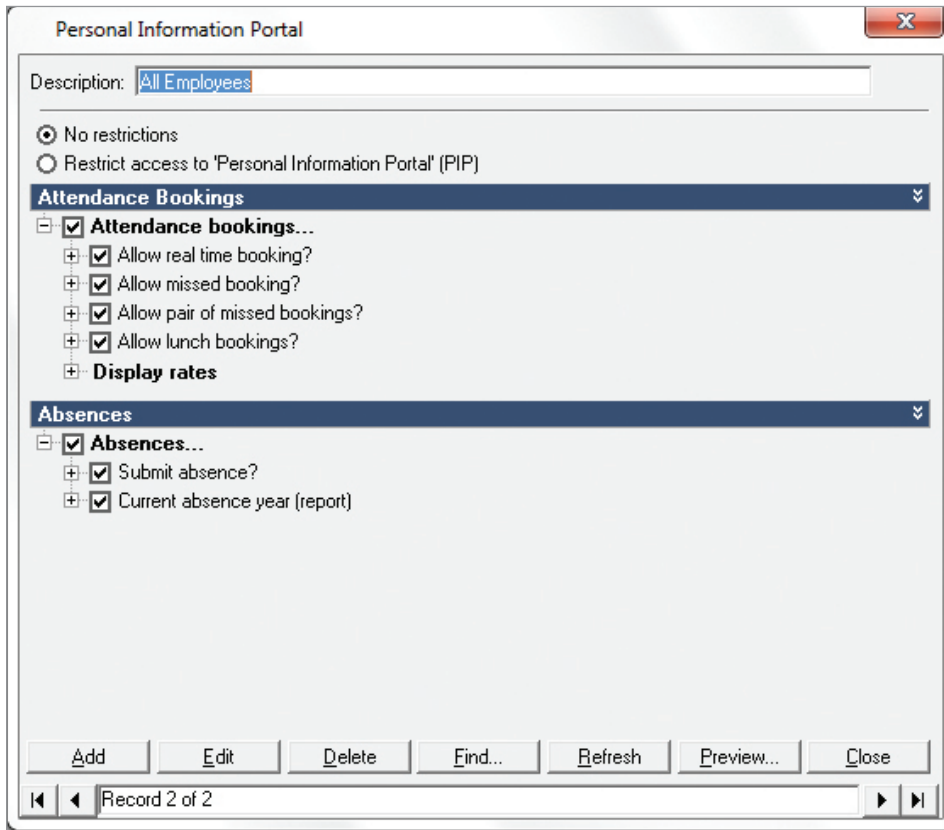
There are two pre-defined Email policies:

- 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.

Person Status

Description:

A back colour can be assigned to a status, which is used to highlight an employee when using the find feature.

Status Options

Working notice

Exclude from working time regulations, payroll export, attendance display panel and planner

Exclude from agenda

Exclude from terminal(s) and calculation

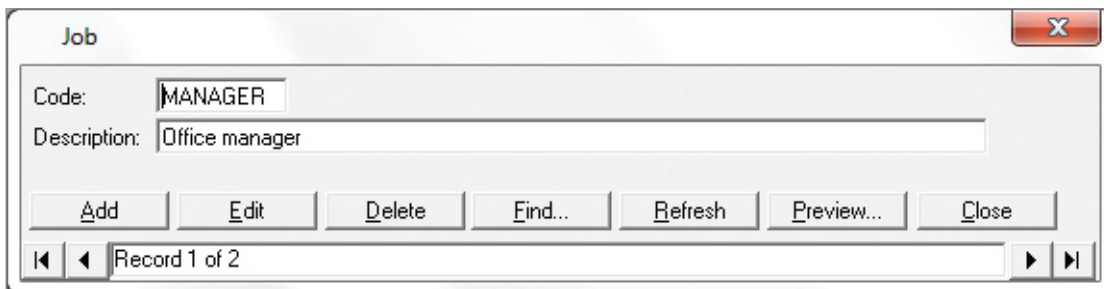
Record 3 of 9

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.



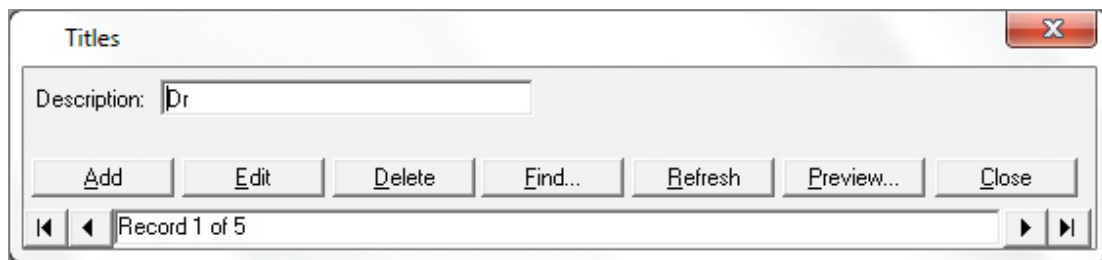
The screenshot shows a window titled "Job" with a close button (X) in the top right corner. Inside the window, there are two text input fields. The first is labeled "Code:" and contains the text "MANAGER". The second is labeled "Description:" and contains the text "Office manager". Below these fields is a row of seven buttons: "Add", "Edit", "Delete", "Find...", "Refresh", "Preview...", and "Close". At the bottom of the window, there is a pagination bar with navigation arrows and the text "Record 1 of 2".

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

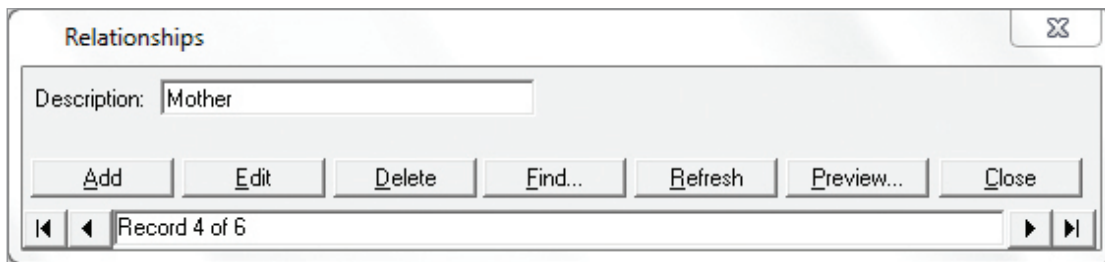


There are seven pre-defined titles:

- 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.

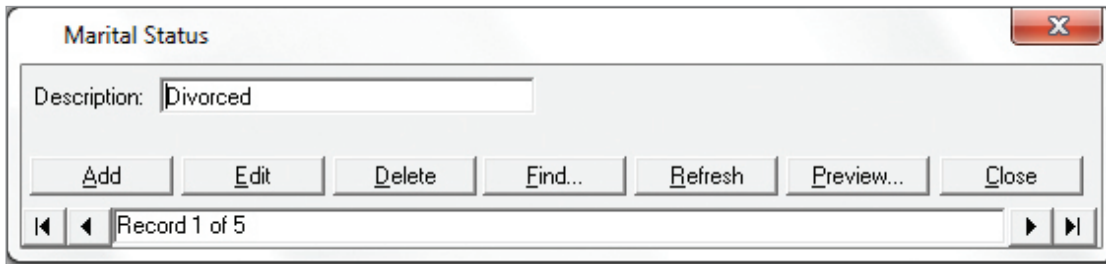


There are six pre-defined relationships:

- 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.

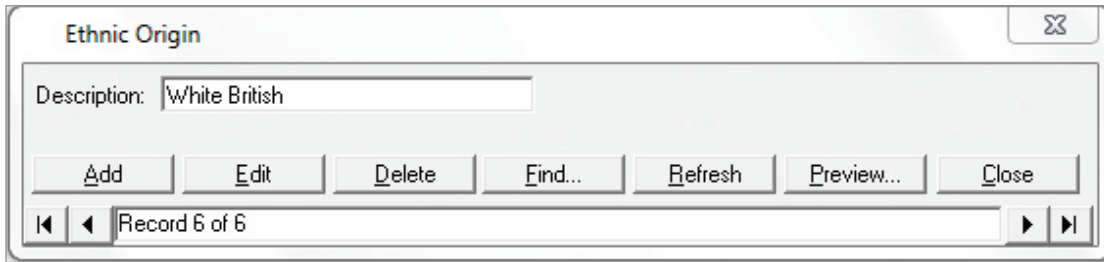


There are four pre-defined Marital Status:

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

Additional marital status may be added by the user.

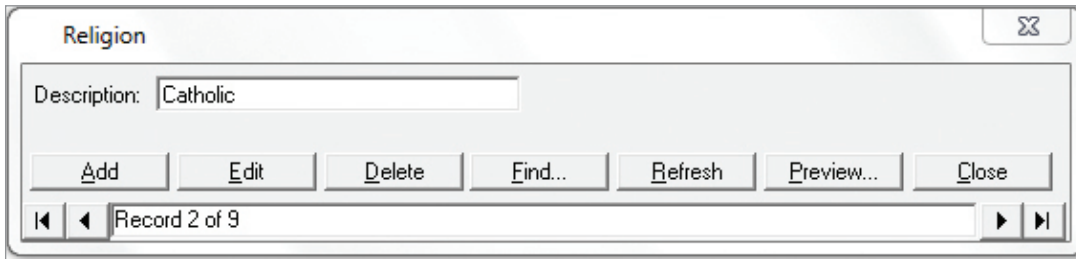
10. Ethnic Origin is used in the Personnel, Personal screen.



There are a number of pre-defined ethnic origins:

Additional ethnic origins may be added by the user.

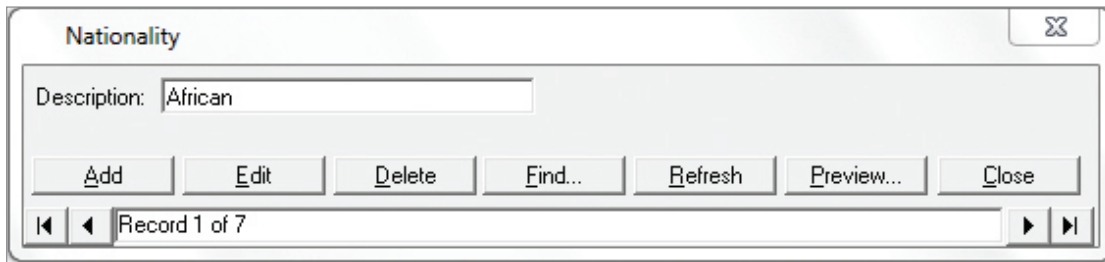
11. Religion is used in the Personnel, Personal screen.



There are a number of pre-defined religions:

Additional religions may be added by the user.

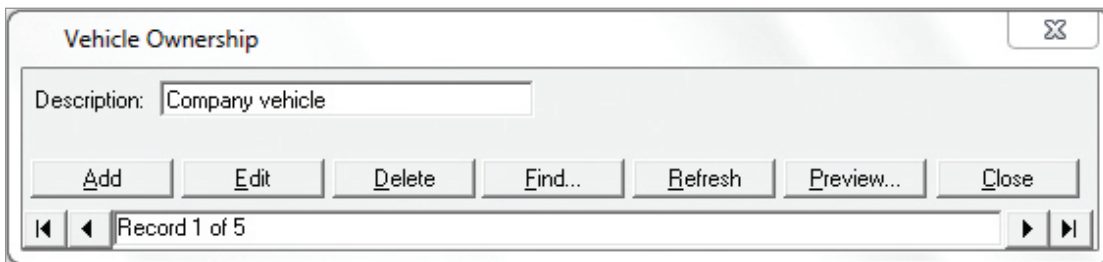
12. Nationality is used in the Personnel, Personal screen.



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.

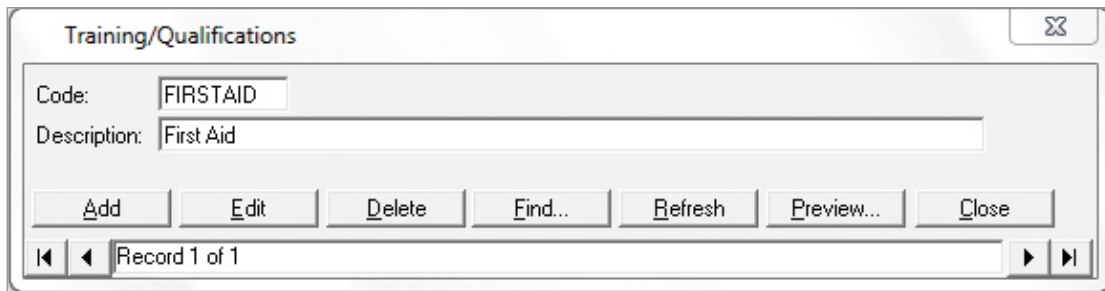


There are three pre-defined vehicle ownerships:

- a.** Contract hire
- b.** Leased
- c.** Purchased

Additional vehicle ownerships may be added by the user.

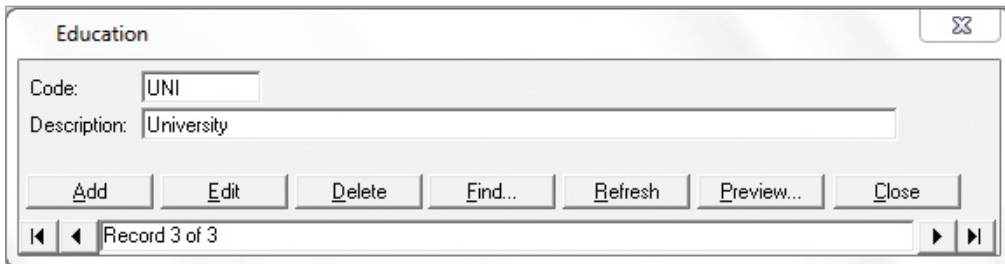
14. Training/Qualifications are used in the Personnel, Miscellaneous, Training/Qualifications screen.



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

Additional training/qualifications may be added by the user.

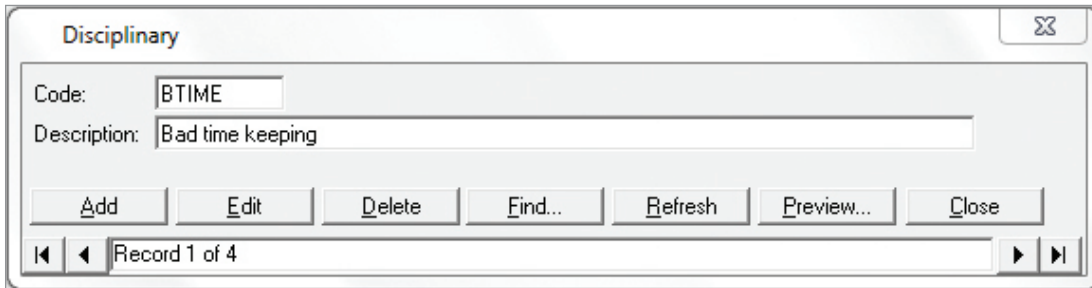
15. Education codes are used in the Personnel, Miscellaneous, Education screen.



There are a number of pre-defined education codes.

Additional education codes may be added by the user.

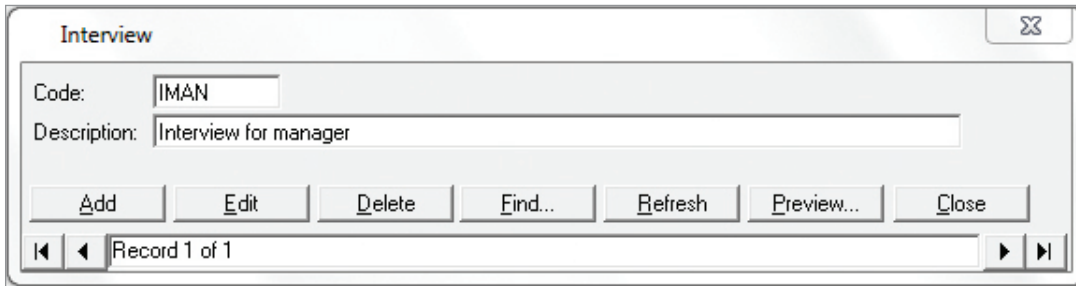
16. Disciplinary codes are used in the Personnel, Miscellaneous, Disciplinary screen.



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.

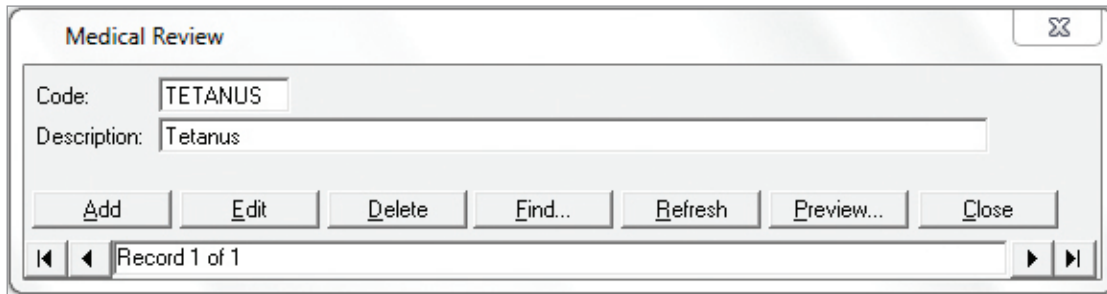


The screenshot shows a software window titled "Interview". It contains two input fields: "Code:" with the value "IMAN" and "Description:" with the value "Interview for manager". Below the fields is a row of buttons: "Add", "Edit", "Delete", "Find...", "Refresh", "Preview...", and "Close". At the bottom of the window, there is a status bar showing "Record 1 of 1" with navigation arrows on either side.

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.

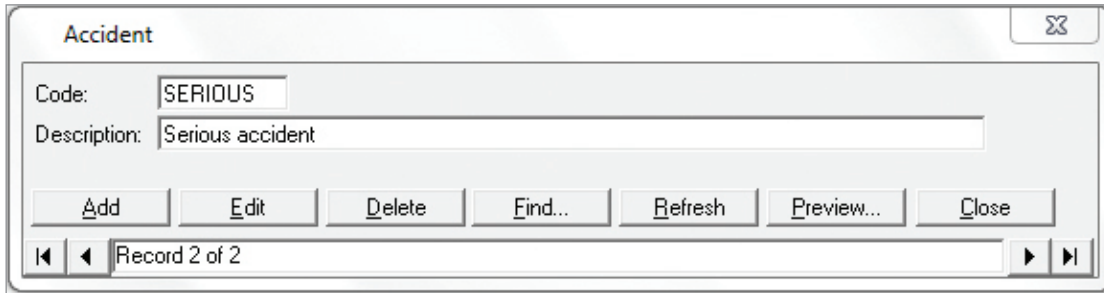
19. Appraisal codes are used in the Personnel, Miscellaneous, Appraisal screen.

The screenshot shows a software window titled "Appraisal". Inside the window, there are two text input fields. The first is labeled "Code:" and contains the text "2013". The second is labeled "Description:" and contains the text "2013 Annual Appraisal". Below these fields is a row of seven buttons: "Add", "Edit", "Delete", "Find...", "Refresh", "Preview...", and "Close". At the bottom of the window, there is a status bar that displays "Record 1 of 3" and includes navigation arrows on either side.

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.

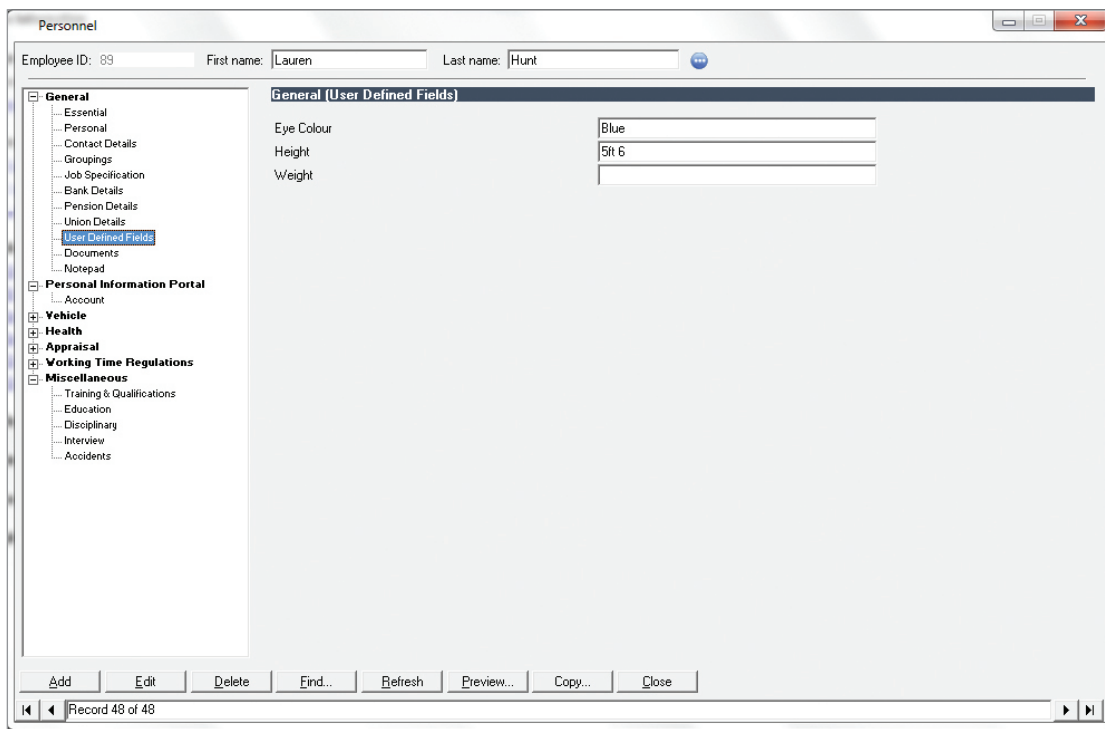


The screenshot shows a window titled "Accident" with a close button in the top right corner. Inside the window, there are two input fields: "Code:" with the value "SERIOUS" and "Description:" with the value "Serious accident". Below these fields is a row of buttons: "Add", "Edit", "Delete", "Find...", "Refresh", "Preview...", and "Close". At the bottom of the window, there is a status bar with navigation icons and the text "Record 2 of 2".

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:

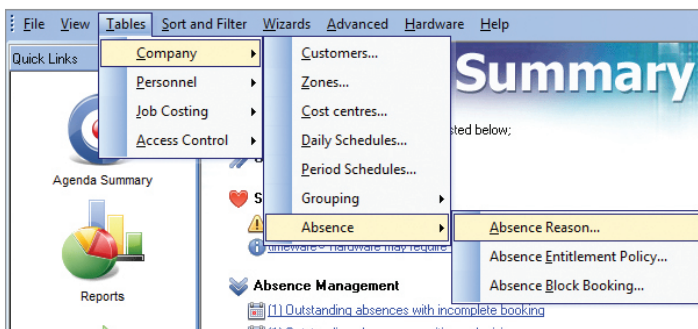
m/03/501

Preparing your timeware[®] system: Absence Management

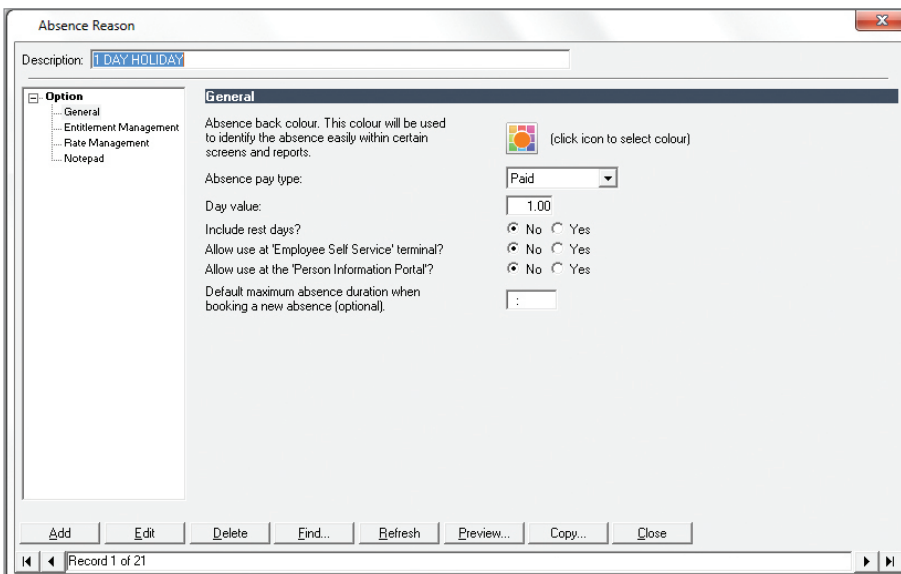


The following module should be completed for every timeware[®] installation.

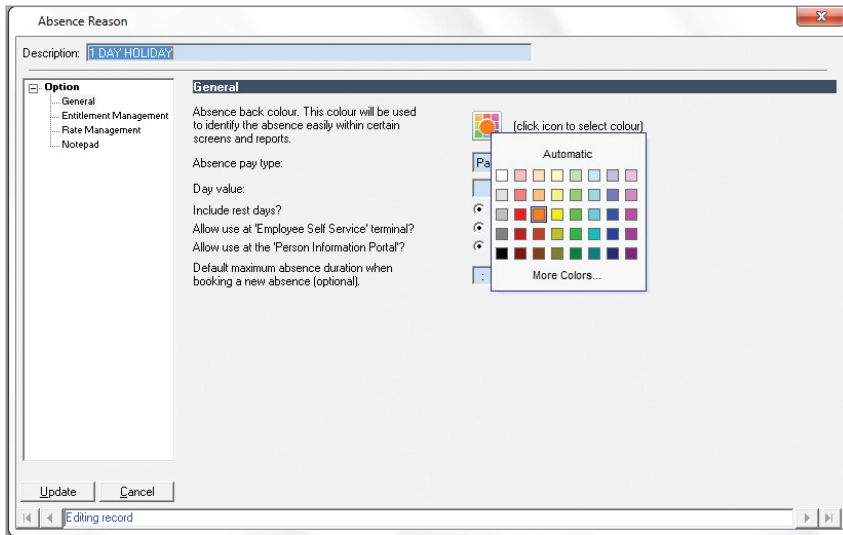
1. To prepare timeware[®] Absence reasons, select the Tables menu then Company, Absences and Absence reason...



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



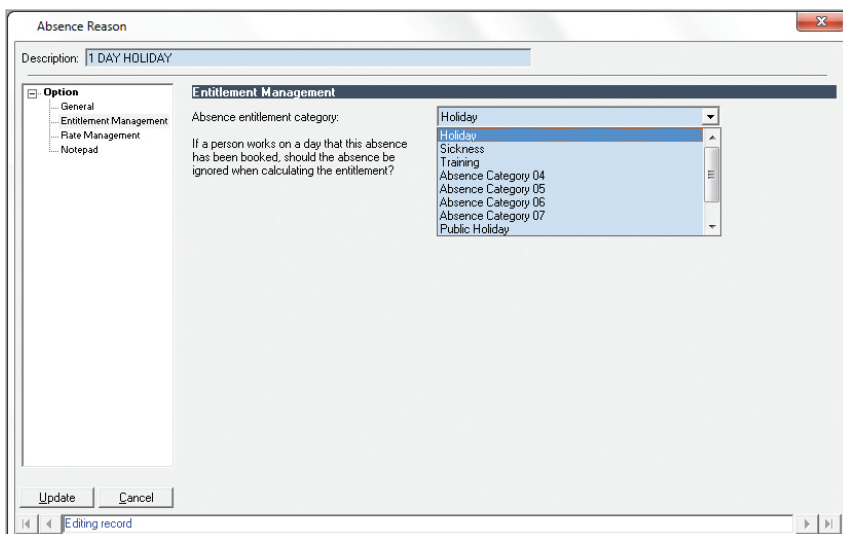
Each absence reason must be given a description and may be allocated a colour. (This colour will appear on the absence statistics and absence and holiday planner screens).



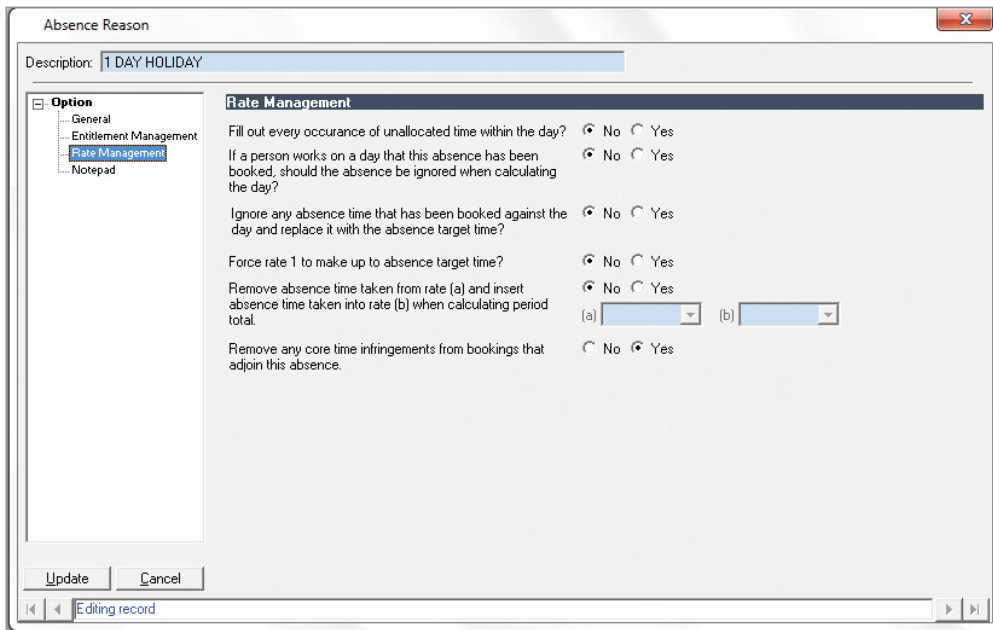
Next, select if the absence reason is paid or unpaid.



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

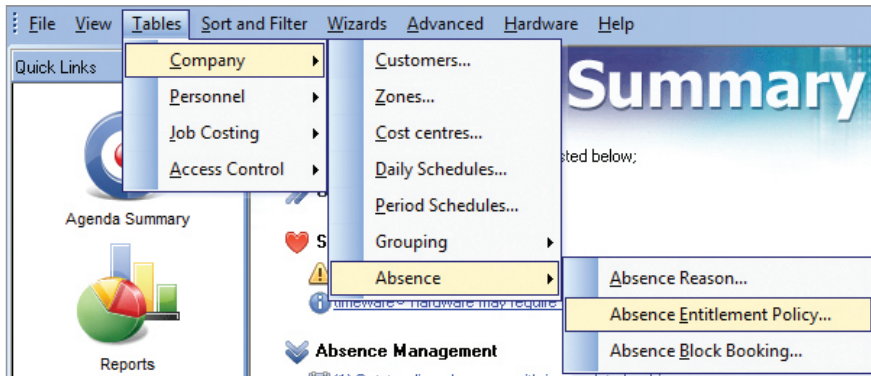


Finally, define the absence rate management.

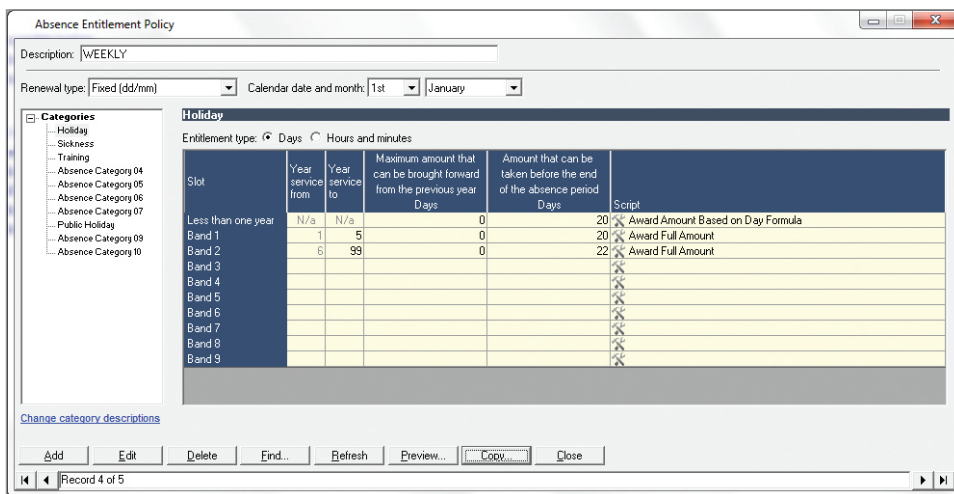


Remember that there many pre-defined absence & holiday reasons and that additional reasons may be added by the user.

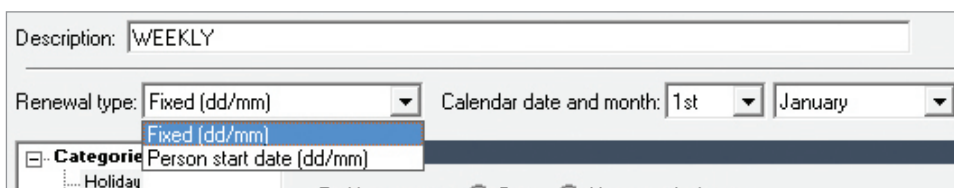
- To prepare timeware® absence entitlement policies, select the Tables menu then Company, Absences and Absence entitlement policy.



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:

Categories
... Holiday
... Sickness

Holiday

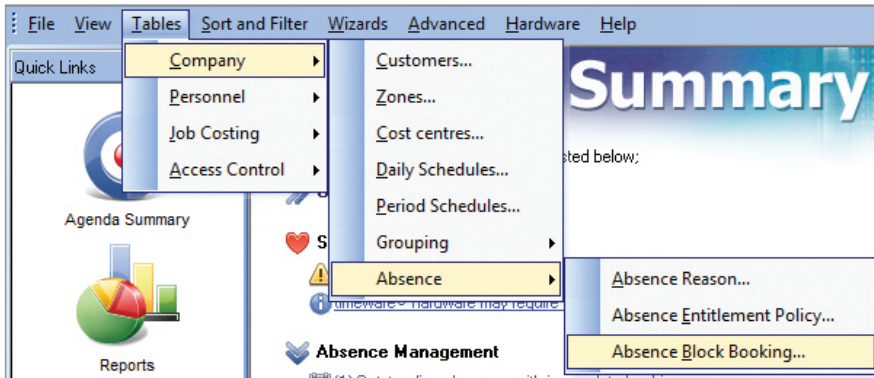
Entitlement type: Days Hours and minutes

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	<input checked="" type="checkbox"/> Award Amount Based on Day Formula
Band 1	1	5	0	20	<input checked="" type="checkbox"/> Award Full Amount
Band 2	6	99	0	22	<input checked="" type="checkbox"/> Award Full Amount
Band 3					<input checked="" type="checkbox"/>
Band 4					<input checked="" type="checkbox"/>
Band 5					<input checked="" type="checkbox"/>
Band 6					<input checked="" type="checkbox"/>
Band 7					<input checked="" type="checkbox"/>
Band 8					<input checked="" type="checkbox"/>
Band 9					<input checked="" type="checkbox"/>

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

- 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 Block Bookings

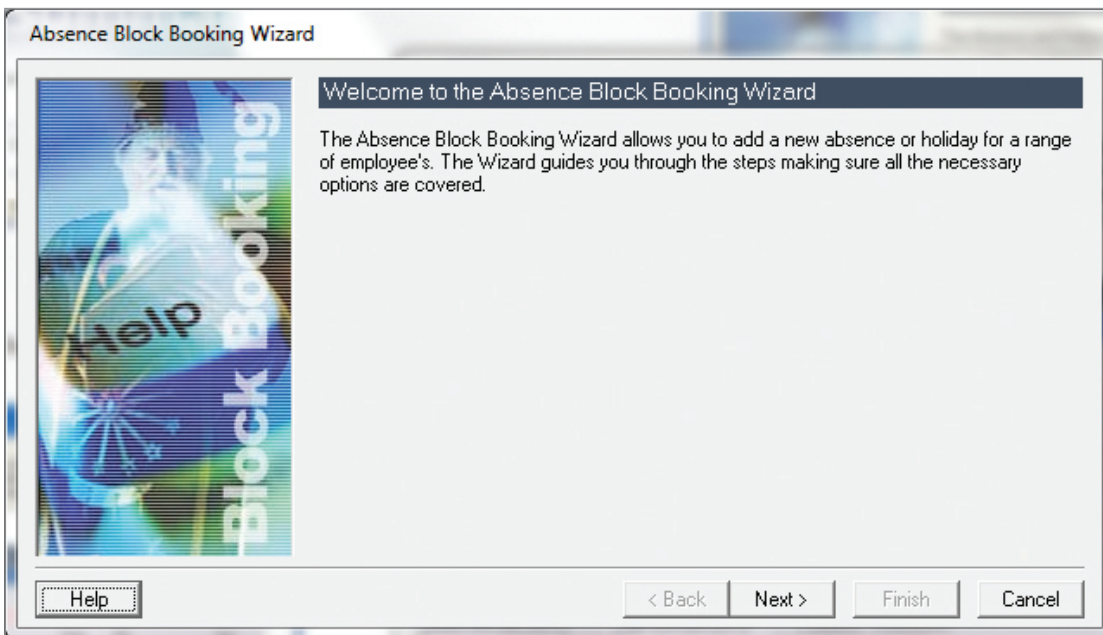
Overview
This screen displays a list of absence block bookings. These may be viewed, amended or deleted by right clicking on the selected block booking and choosing the appropriate option. Please note that block bookings are handled by the 'System Maintenance' event within the Event Handler, so there could be a delay from the block booking being entered until the absence getting inserted against an employee.

Drag a column header here to group by that column.

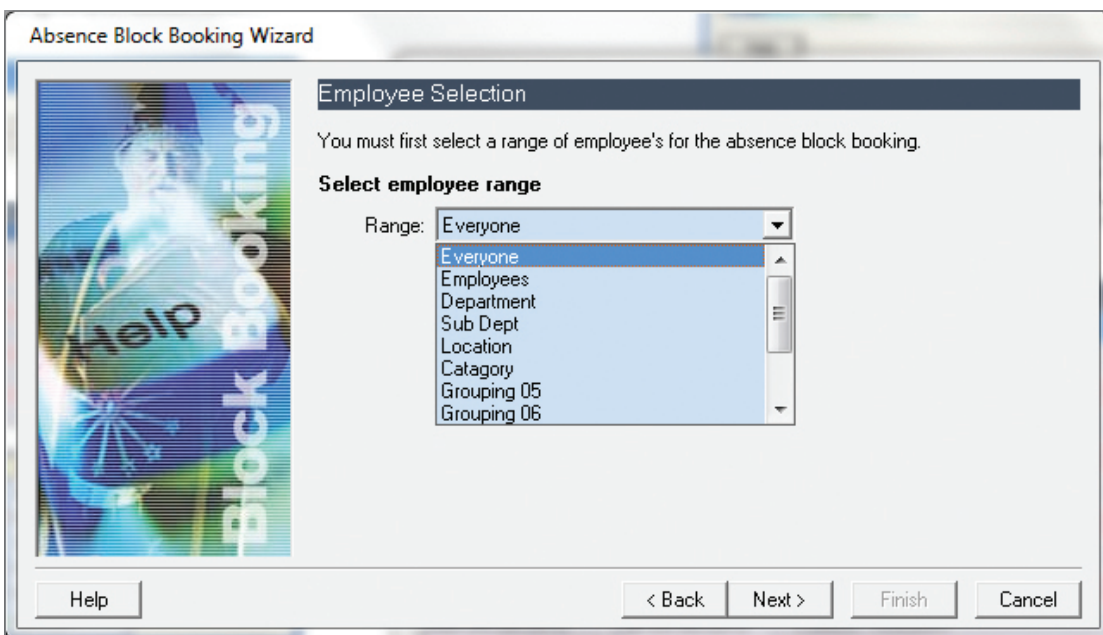
Absence From	Absence To	Absence	Authorisation	Finalised	Awaiting Deletion	Handled
Mon 29/08/2011	Mon 29/08/2011	PUBLIC HOLIDAY	Approved	True	No	Yes
Mon 26/12/2011	Tue 27/12/2011	PUBLIC HOLIDAY	Approved	True	No	Yes
Mon 02/01/2012	Mon 02/01/2012	PUBLIC HOLIDAY	Approved	True	No	Yes
Tue 14/02/2012	Tue 14/02/2012	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

Close

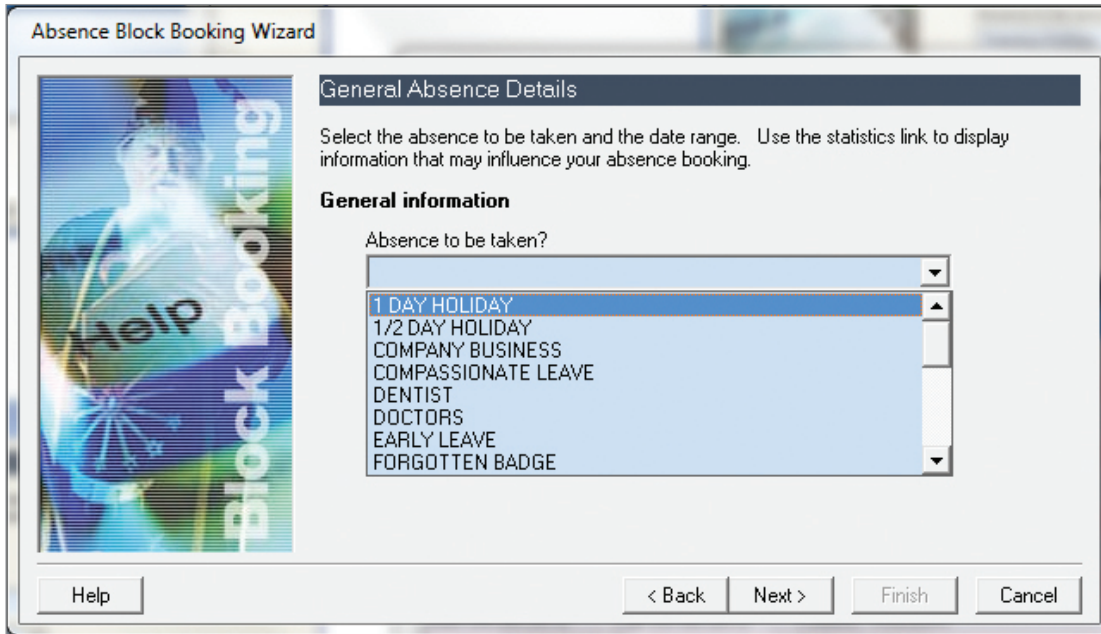
Follow the instructions on the next eight screens to create a block booking for many people.



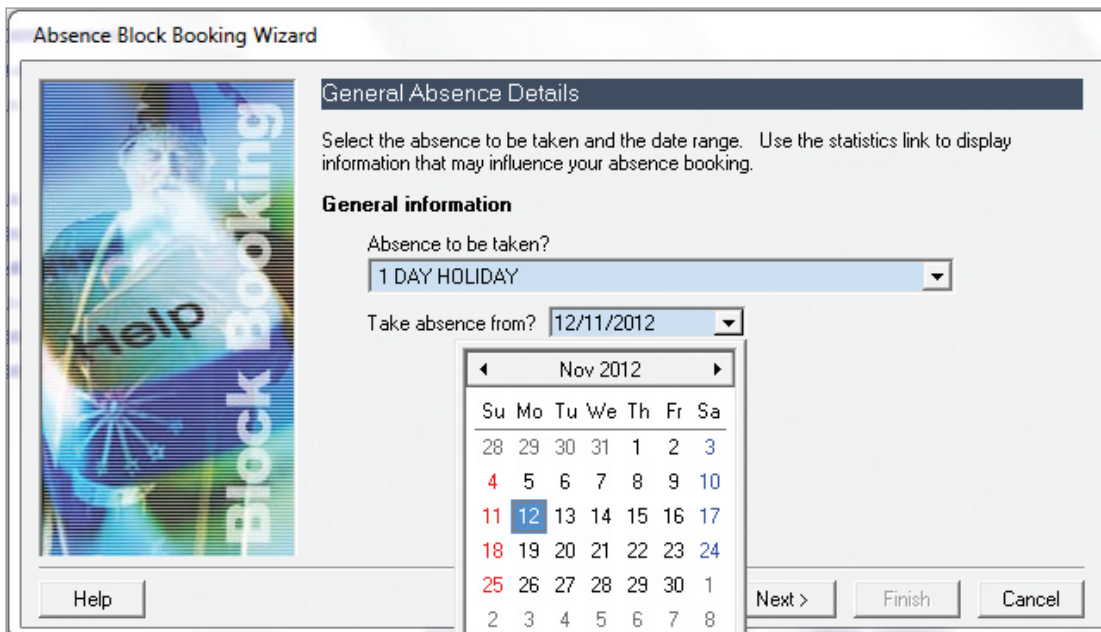
Select the range of people.



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

Absence Block Booking Wizard

Absence Restrictions (Optional)

Next, specify which time of the day the absence can be taken and its maximum duration. Leaving these fields blank enables the absence to be taken throughout the entire schedule.

Absence restrictions (optional)

Absence can only be taken between? : and : .

Maximum absence duration? :

Buttons: Help, < Back, Next >, Finish, Cancel

Leave the absence restrictions blank.

Absence Block Booking Wizard

Force Absence Duration to Paid at a Specified Rate (Optional)

Next, specify if you wish to override the daily schedule and force the absence duration to be paid at the specified absence rate.

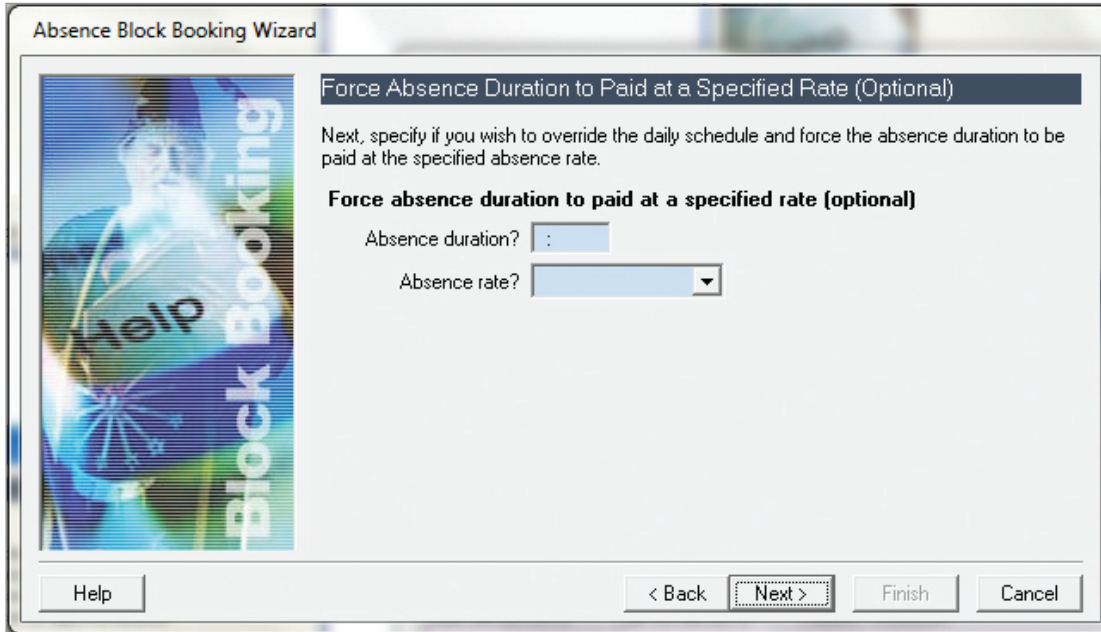
Force absence duration to paid at a specified rate (optional)

Absence duration? :

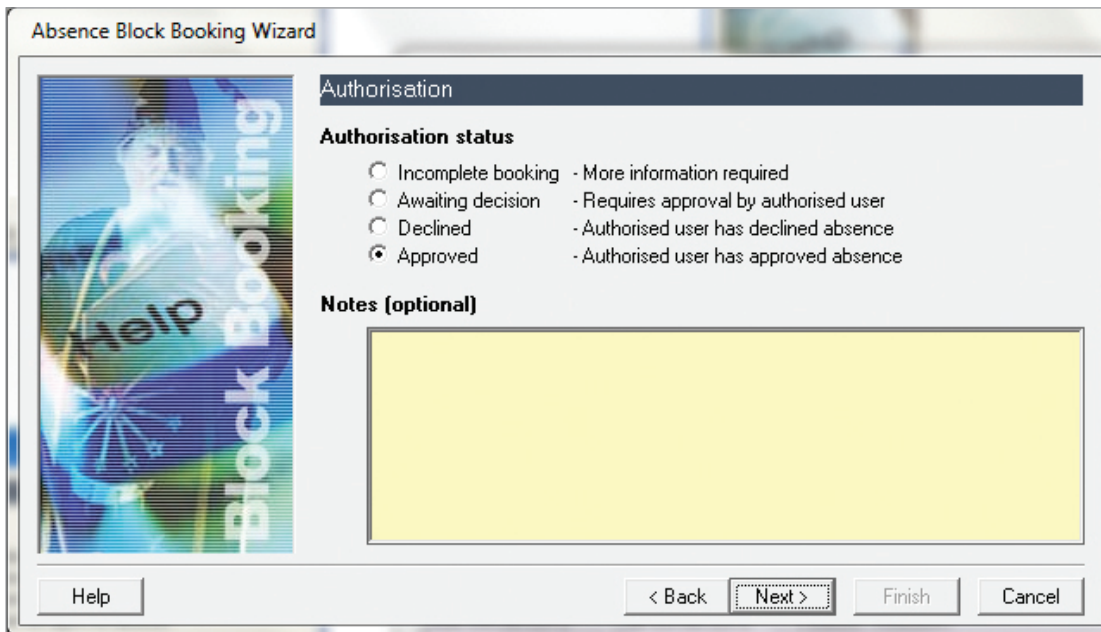
Absence rate?

Buttons: Help, < Back, Next >, Finish, Cancel

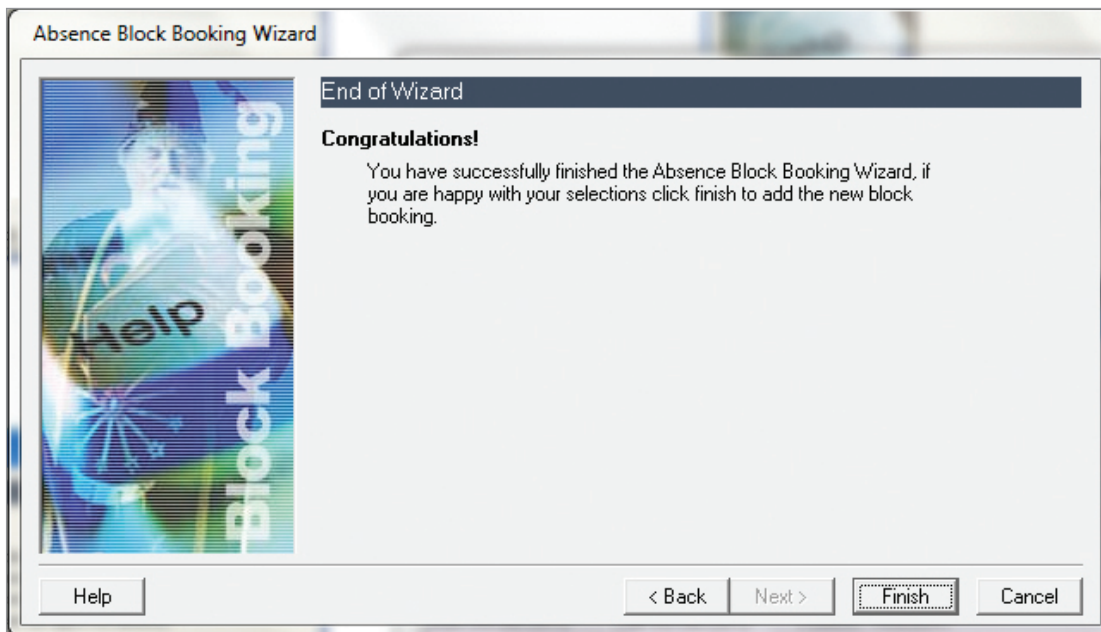
Leave the Force absence duration... fields blank.



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 !

Module:

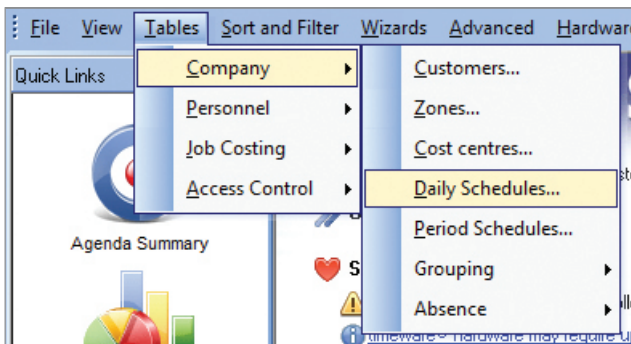
m/04/501

Preparing your timeware® system: Attendance

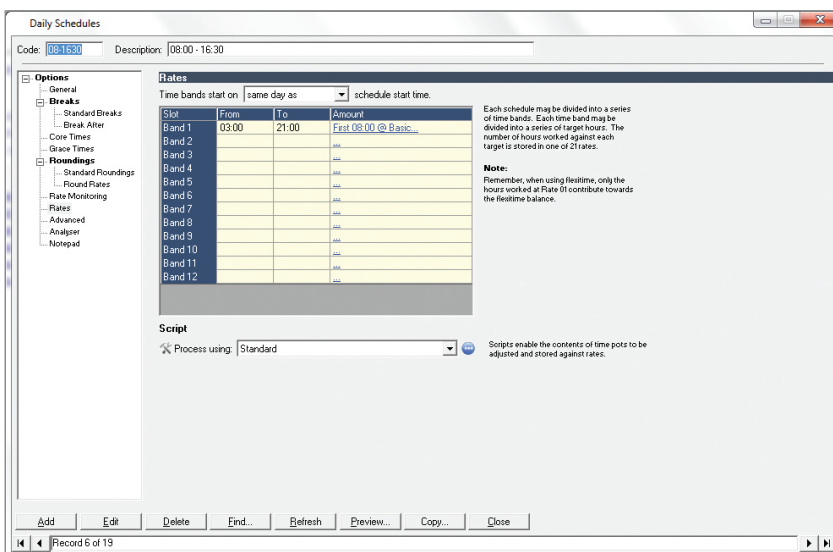


The following module should be completed for every timeware® installation implementing attendance.

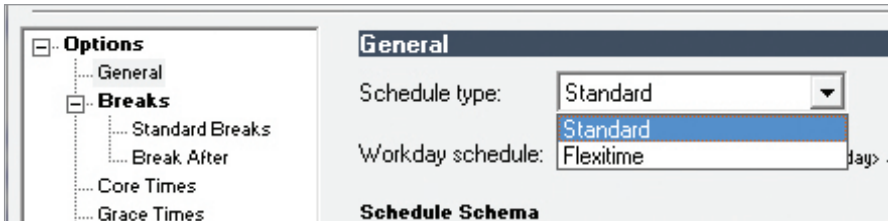
1. To prepare timeware® attendance daily schedules, select the Tables menu, Company, then Daily Schedules.



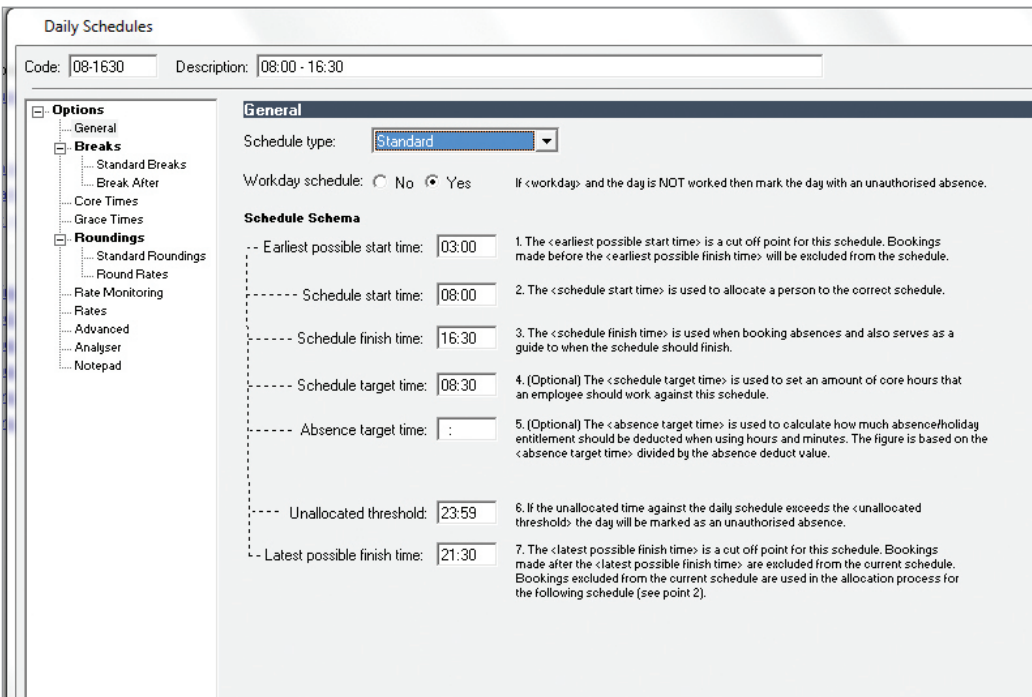
The daily schedule screen will appear.



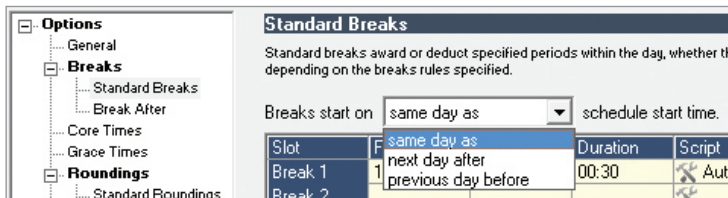
Click <Add>, enter a code and description and select the schedule type, (either standard or flexitime).



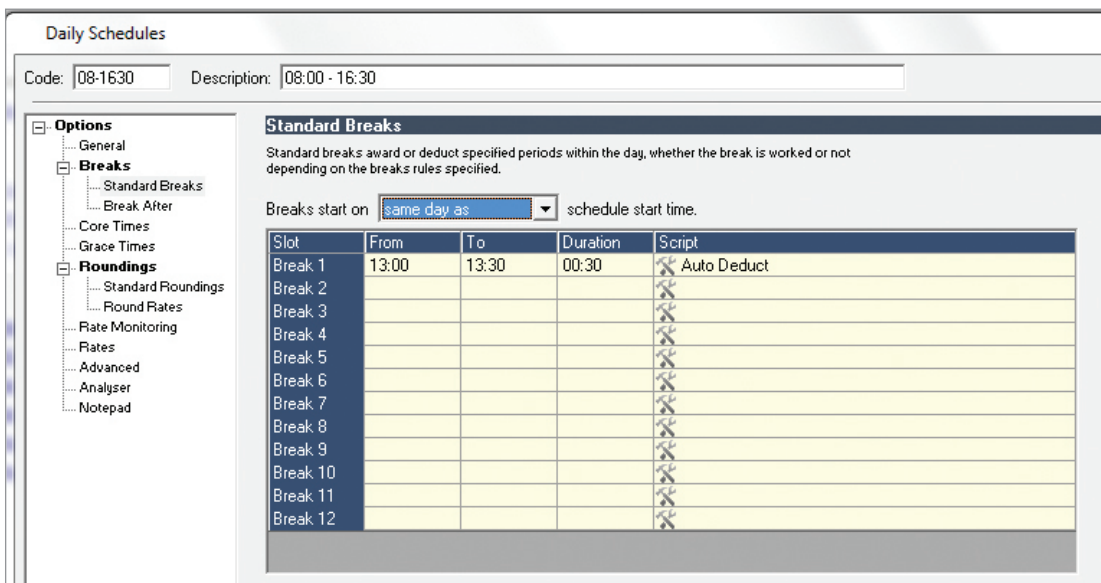
Next enter the earliest possible start time, the schedule start and finish times, the schedule target time and the latest possible finish time.



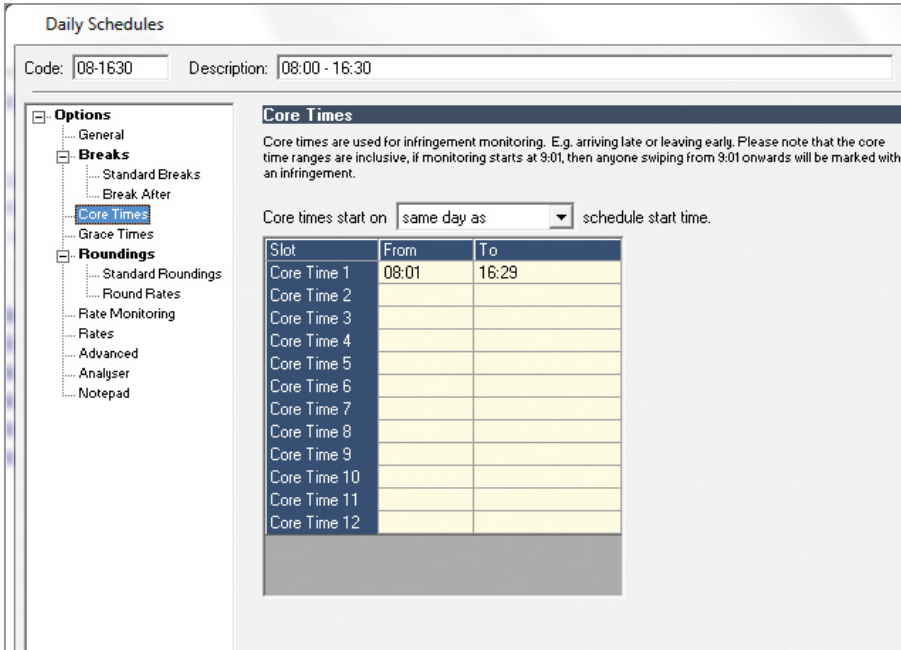
Next click on Standard Breaks and ensure that the 'Break start on the same day' is selected.



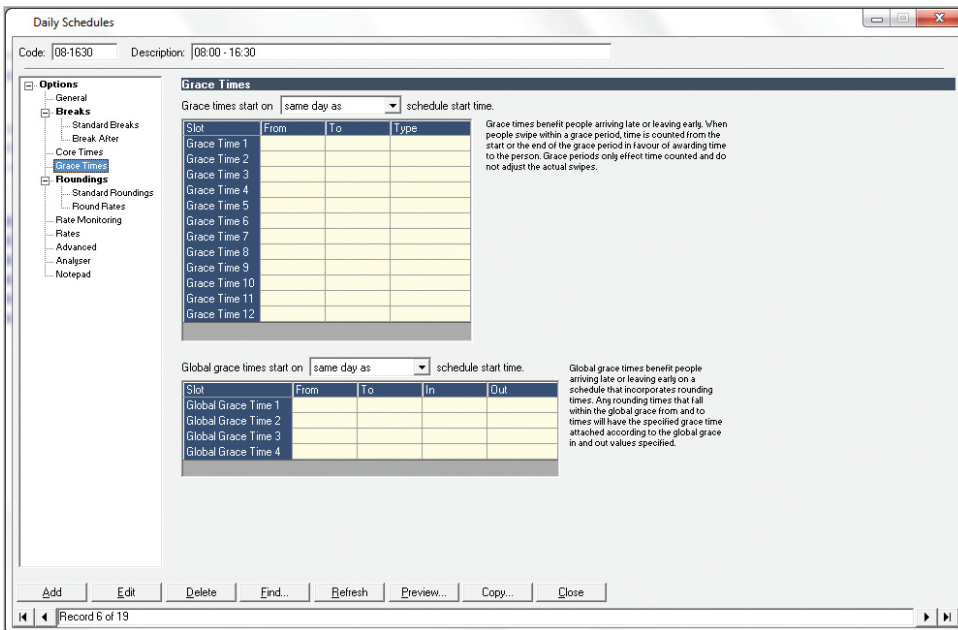
Create up to twelve breaks throughout the schedule.



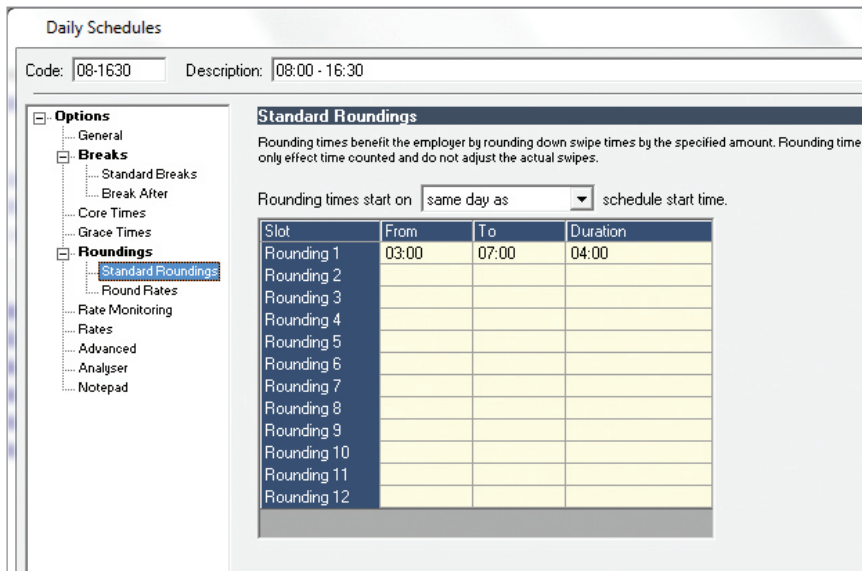
Next click on Core Times and create the core time bands for the schedule.



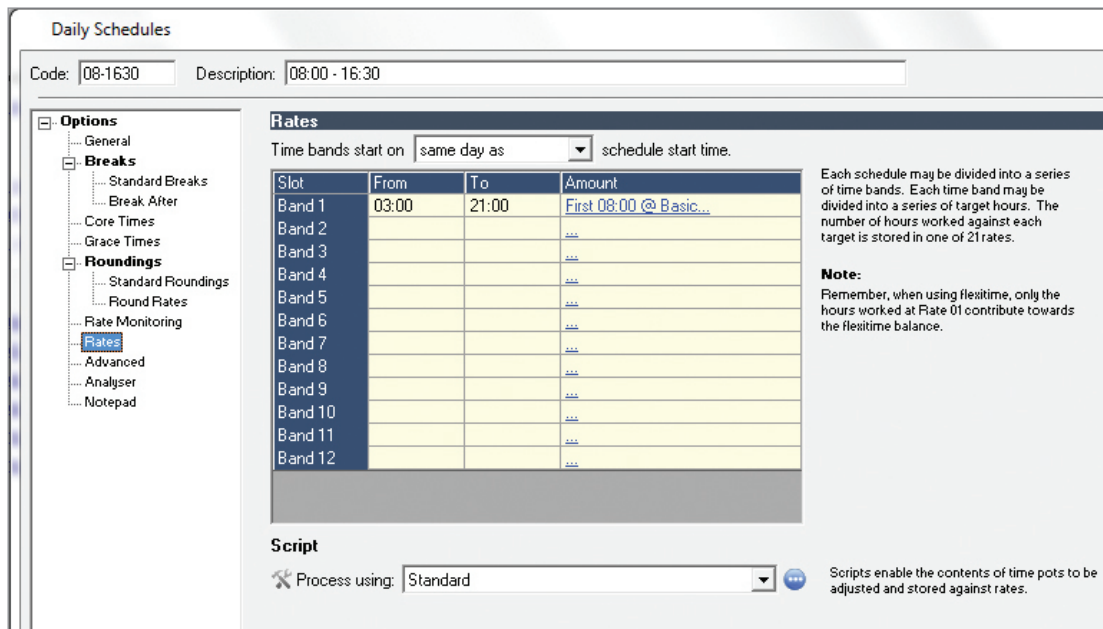
Now repeat the same process for the schedule grace times.



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

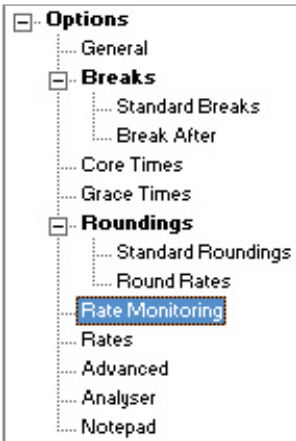


Now click on Time Pots and define how the hours worked are allocated to the 'Time Pots'.



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.

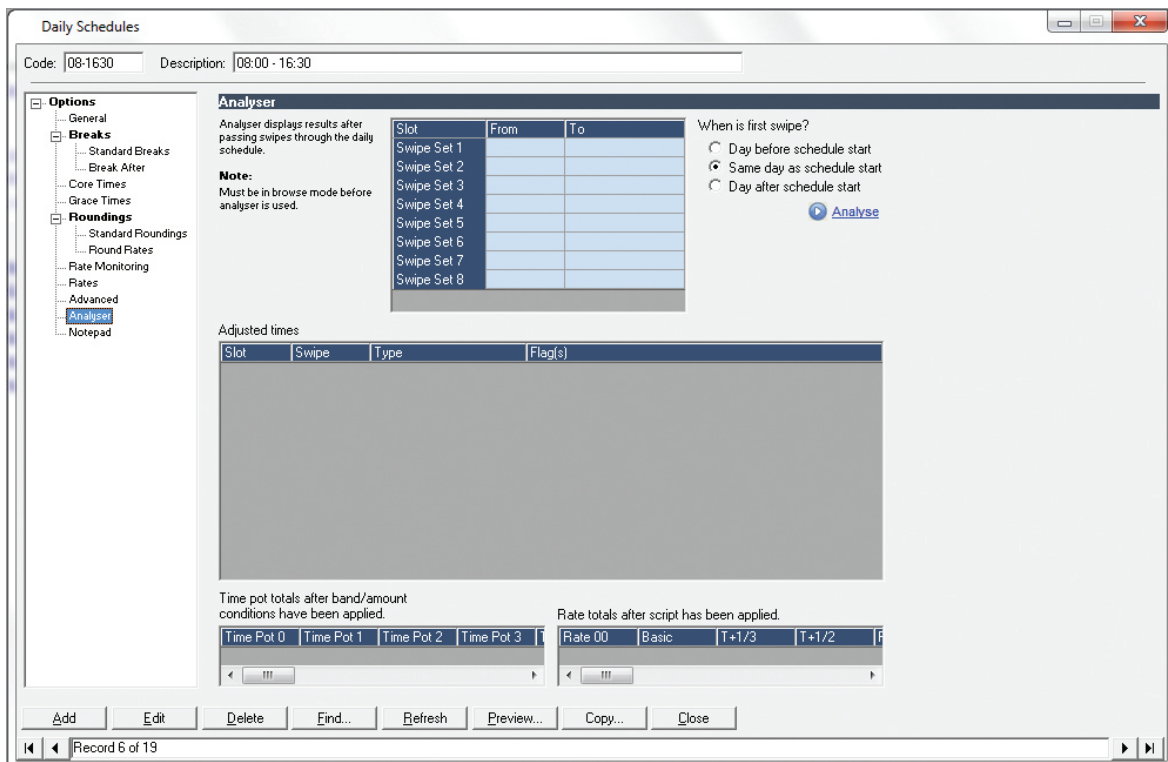
Rate Monitoring

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

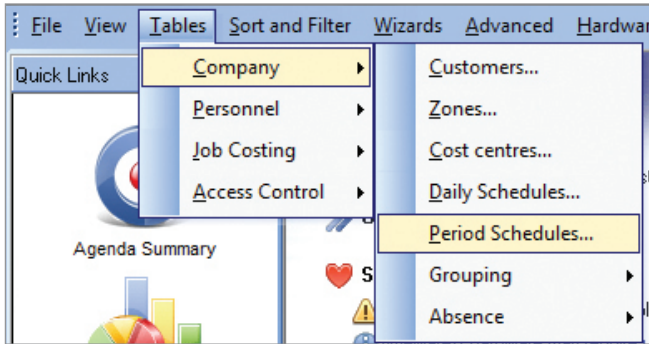
Rate	Threshold
Basic	07:00
T+1/3	01:00
T+1/2	
Rate 04	
Rate 05	
Rate 06	
Rate 07	
Rate 08	
Rate 09	
Rate 10	
Rate 11	
Rate 12	
Rate 13	
Rate 14	
Rate 15	
Rate 16	
Rate 17	
Rate 18	
Rate 19	
Rate 20	

Click on <Update> to save the record.

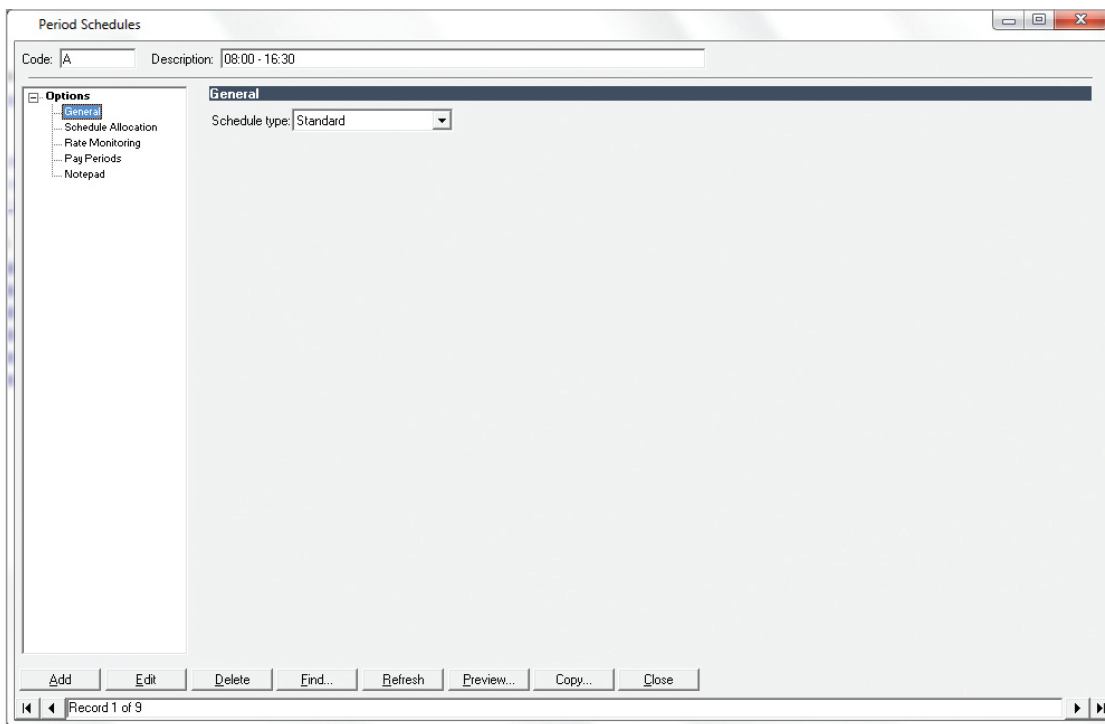
Finally, use the analyser option to test the schedule that you have created.



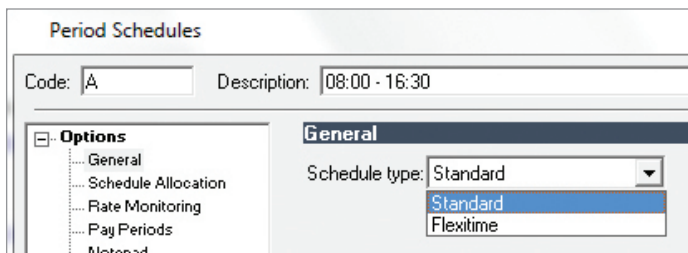
2. To prepare timeware® attendance period schedules, select the Tables menu, Company, then Period Schedules.



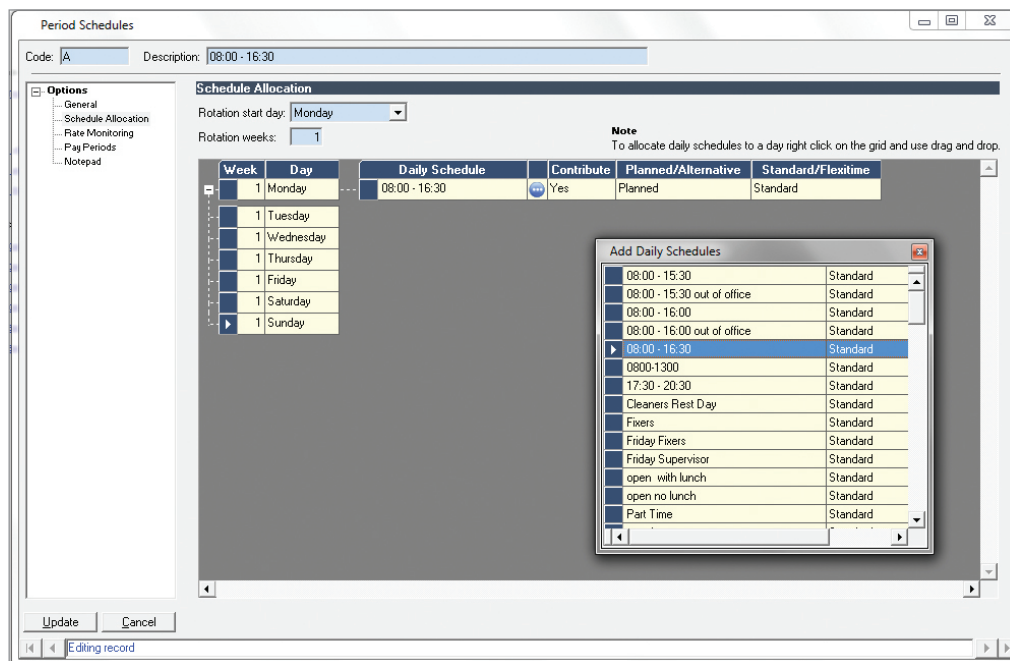
The period schedule screen will appear.



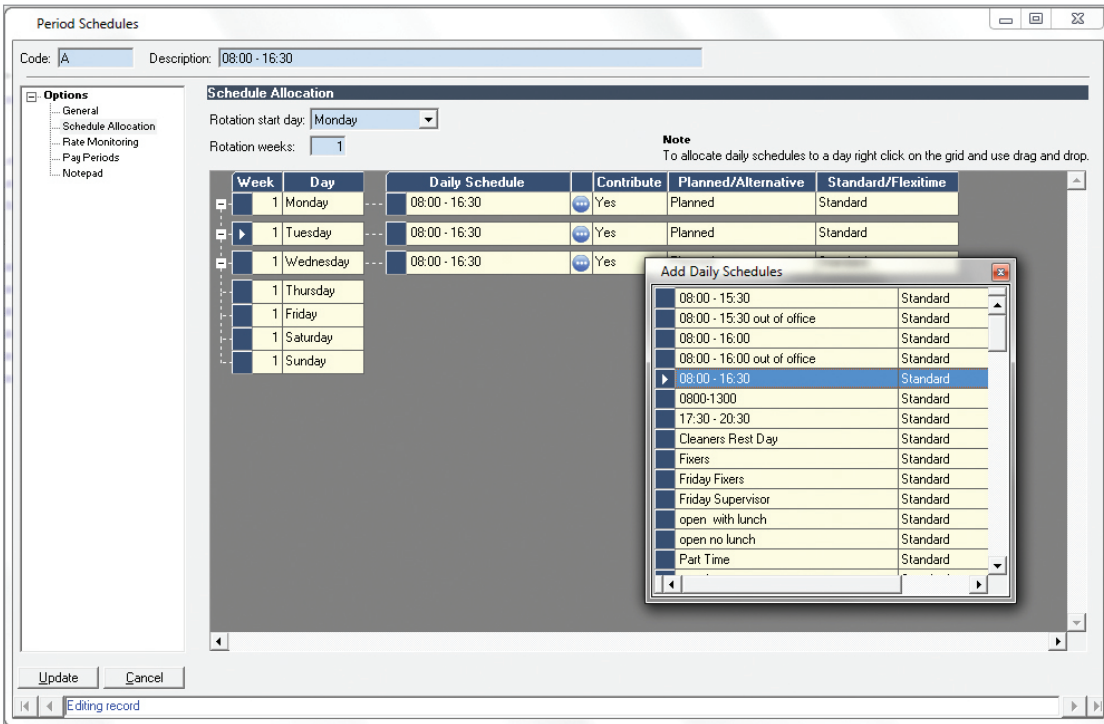
Click <Add> and enter a period code and description. Then select the schedule type (either standard or flexitime).



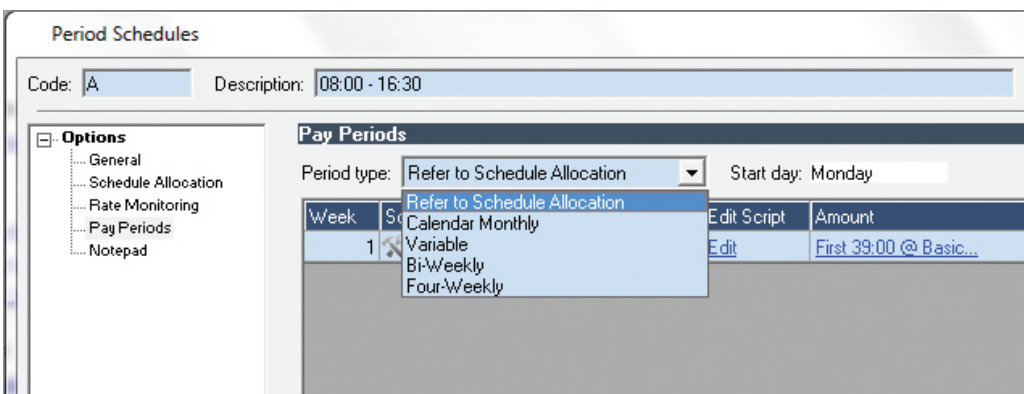
Next, select schedule allocation, <Right-click> on the grid and select Add Daily Schedules.



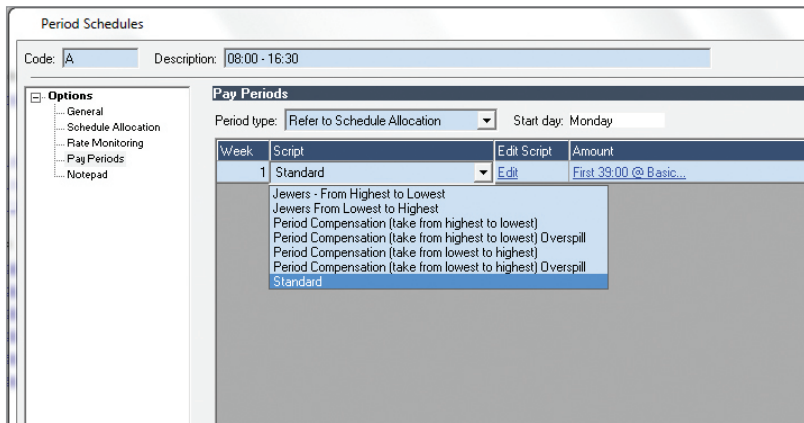
Drag the daily schedule and drop on the appropriate day.



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).

Module:

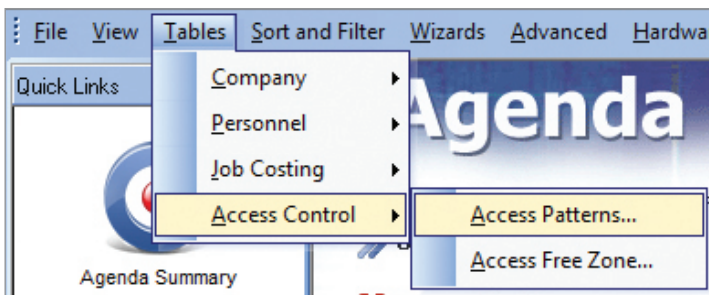
m/05/501

Preparing your timeware® system: Access control

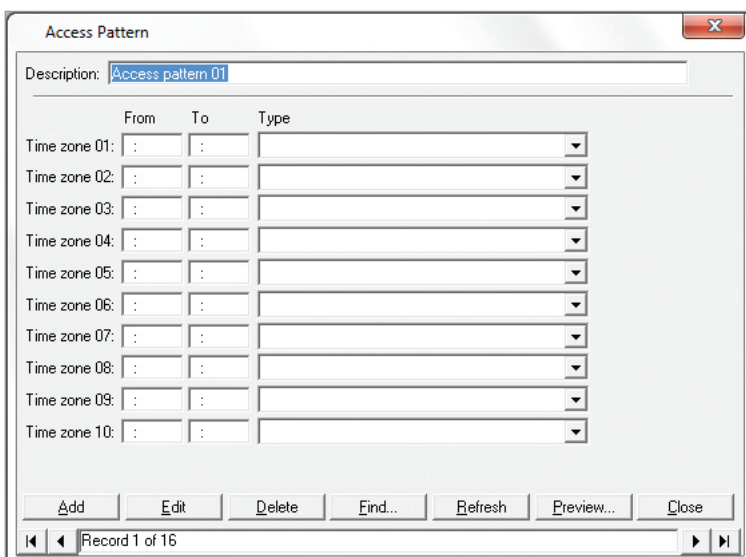


The following module should be completed for every timeware® installation implementing access control.

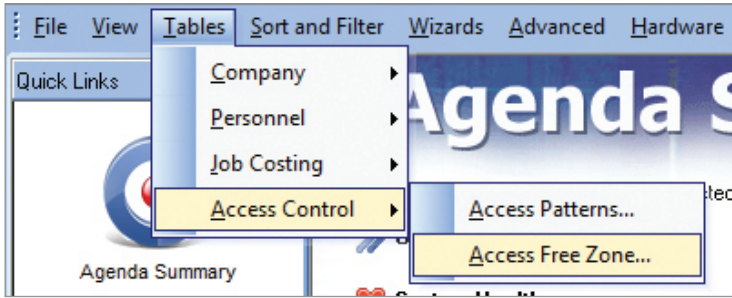
1. To prepare timeware® Access control settings, select the Tables menu, Access Control, then Access Patterns.



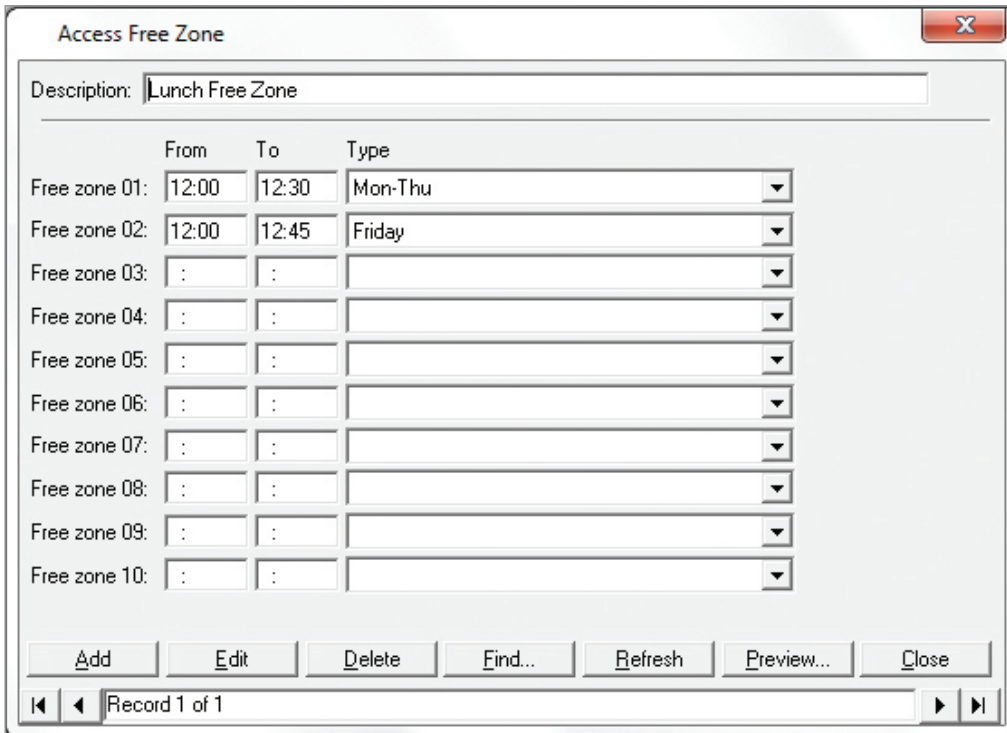
Next, define the new access pattern.



- 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

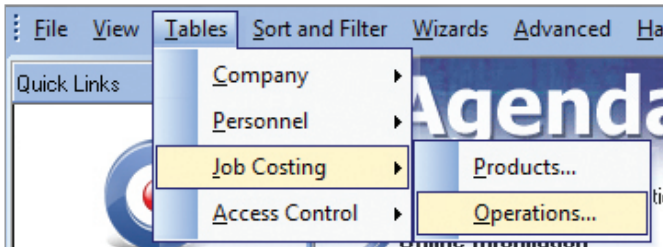
Preparing your timeware[®] system: Job costing



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

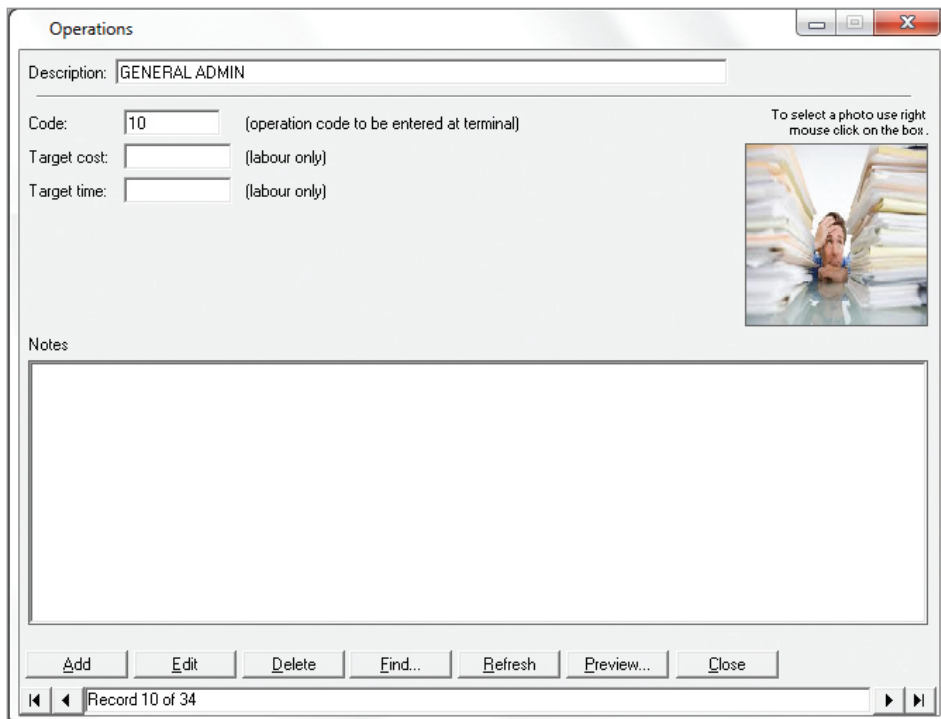
Remember that an operation is the smallest process that can be performed and that many operations make a product.

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



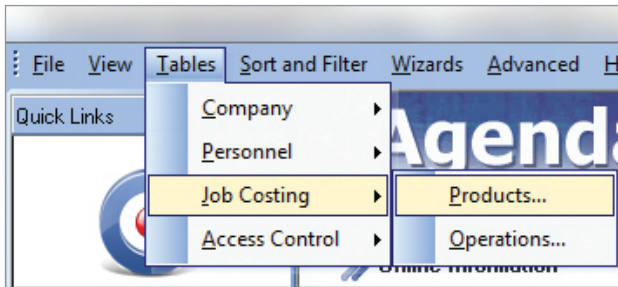
Next, create each required operation. Remember that the code defined against the operation is the code that must be selected when entering data at the shop floor data collection terminal.

The user may also specify a target cost and target time



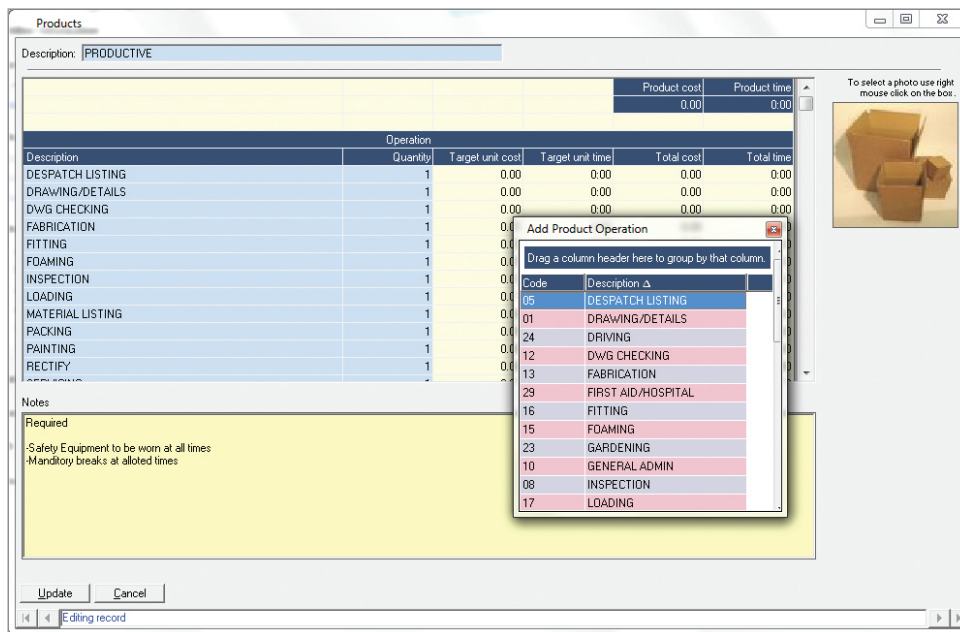
Click <Update> to save the operation and <Close> to return to the agenda.

- 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.



Lined area for notes with horizontal ruling lines.