



Global experts in Employee
Management Solutions

Mitrefinch WinTMS 8 User Manual

Version 1

Edited by Susanne Griffiths

Table Of Contents

| | |
|---|-----------|
| 1 Introduction | 14 |
| 1.1 Aim of the user guide..... | 14 |
| 1.2 Structure | 14 |
| 1.3 How to find out which version you are running | 15 |
| 2 System specification | 16 |
| 2.1 Software..... | 16 |
| 2.2 Hardware | 16 |
| 2.2.1 Clocking terminals..... | 16 |
| 2.3 System upgrade history | 17 |
| 2.4 Training log..... | 18 |
| 3 General system use | 19 |
| 3.1 Standard and customised systems..... | 19 |
| 3.2 Logging on | 19 |
| 3.3 Main form | 20 |
| 3.4 Custom toolbar | 21 |
| 3.5 Select an employee | 22 |
| 3.6 Select a group | 24 |
| 3.7 Selection options..... | 24 |
| 3.8 Select range..... | 28 |
| 3.9 Select a date..... | 31 |
| 3.10 Select available items..... | 31 |
| 3.11 Using drop-down lists | 32 |
| 3.12 Documents..... | 33 |
| 3.12.1 Add a document..... | 34 |
| 3.12.2 Display a document..... | 36 |
| 3.12.3 Delete a document..... | 37 |
| 3.13 Maintain codes..... | 37 |
| 3.14 Using Edit and Update | 38 |
| 3.14.1 When to use Update | 39 |
| 3.14.2 Using Update for a future change..... | 39 |
| 3.14.3 Using Update for a past change..... | 39 |
| 3.14.4 When to use Edit..... | 40 |
| 3.15 Viewing historical information..... | 40 |

| | |
|---|-----------|
| 3.15.1 Field history..... | 40 |
| 3.15.2 Screen history | 41 |
| 3.15.3 Point in time view | 41 |
| 3.15.4 Editing historical information | 42 |
| 3.16 Change password..... | 43 |
| 3.17 System structure | 43 |
| 4 Employee maintenance | 45 |
| 4.1 Add/restart an employee..... | 45 |
| 4.1.1 Add an employee | 45 |
| 4.1.2 Restart an employee | 45 |
| 4.2 Planned shift changes | 47 |
| 4.3 Recent clockings..... | 47 |
| 4.4 Employee details..... | 49 |
| 4.4.1 TMS details..... | 49 |
| 4.4.2 Entitlements..... | 52 |
| 4.5 Files | 53 |
| 4.6 Employee picture | 54 |
| 4.7 Change employee number..... | 55 |
| 4.8 Change employee type | 56 |
| 4.9 Edit employee's flex balance..... | 56 |
| 4.10 Employee leaving..... | 57 |
| 4.10.1 Identify the employee as a leaver..... | 57 |
| 4.10.2 Delete employee | 57 |
| 4.11 Edit user from Employee menu | 57 |
| 4.12 Maintain package links..... | 58 |
| 5 Group maintenance..... | 61 |
| 5.1 Authorise requests..... | 61 |
| 5.2 Group absence profile..... | 62 |
| 5.3 Onsite/absent list..... | 65 |
| 5.4 Skills matrix | 68 |
| 5.5 Summary list | 69 |
| 5.6 Re-do current period processing | 71 |
| 5.7 Recalculate work records..... | 71 |
| 6 Mass change..... | 73 |

| | |
|--|-----------|
| 6.1 Mass change on non multi-line records..... | 73 |
| 6.2 Mass change for multiple fields | 75 |
| 6.3 Mass change for leavers | 76 |
| 6.4 Maintain validity of data in mass change | 76 |
| 6.5 Mass change on multi-line records..... | 77 |
| 6.5.1 Add records to multi-line tables | 77 |
| 6.5.2 Edit multi-line records..... | 79 |
| 6.6 Planned shift change for range | 80 |
| 6.7 Send message to employees..... | 81 |
| 6.8 Download all employees..... | 82 |
| 6.9 Mass Roster Change..... | 82 |
| 6.10 Planned TAS clockings for range | 82 |
| 7 Badges..... | 85 |
| 7.1 Employee badge number | 85 |
| 7.1.1 Issuing a replacement badge | 85 |
| 7.1.2 Change badge number..... | 85 |
| 7.1.3 Change badge version number | 86 |
| 7.2 Badge list..... | 86 |
| 7.3 Badge history | 87 |
| 7.4 Maintain temporary badges | 87 |
| 7.4.1 Issue a badge..... | 88 |
| 7.4.2 Return a badge..... | 89 |
| 7.4.3 Change a badge's 'valid until' date..... | 89 |
| 7.4.4 Create a new badge | 89 |
| 7.4.5 Cancel a badge | 90 |
| 7.4.6 Delete a badge | 90 |
| 7.5 Maintain visitor badges..... | 90 |
| 7.5.1 What is a visitor badge?..... | 90 |
| 7.5.2 Issue a visitor badge..... | 91 |
| 7.5.3 Return a visitor badge..... | 92 |
| 7.5.4 Modify a badge | 92 |
| 7.5.5 Create a new badge | 92 |
| 7.5.6 Delete a badge | 93 |
| 7.6 Visitor badge types | 93 |

| | |
|---|------------|
| 8 Hours categories | 95 |
| 8.1 Worked hours | 95 |
| 8.1.1 Modify a worked hours code | 95 |
| 8.1.2 Add a worked hours code | 96 |
| 8.1.3 Delete a worked hours category..... | 97 |
| 8.1.4 Usage button..... | 97 |
| 8.1.5 Overtime reconciliation sequence | 98 |
| 8.1.6 Print worked hours code details | 98 |
| 8.2 Absence hours..... | 99 |
| 8.2.1 Modify an absence hours code | 99 |
| 8.2.2 Add an absence hours code | 100 |
| 8.2.3 Delete an absence hours code..... | 101 |
| 8.2.4 Usage button..... | 101 |
| 8.2.5 Print absence hours details..... | 102 |
| 8.3 Additional payments | 102 |
| 8.3.1 Modify additional payments | 103 |
| 8.3.2 Add additional payments | 103 |
| 8.3.3 Delete additional payments..... | 104 |
| 8.3.4 The Usage button..... | 104 |
| 8.3.5 Print additional payment details..... | 105 |
| 8.3.6 Maintain additional payments display sequence | 105 |
| 9 Entitlements..... | 106 |
| 9.1 View entitlements..... | 106 |
| 9.2 Year end procedure | 107 |
| 10 Daily anomaly correction | 110 |
| 10.1 Daily anomaly correction | 110 |
| 10.1.1 Anomalies that can occur in all systems | 110 |
| 10.1.2 Anomalies that can occur in flexitime systems only | 110 |
| 10.1.3 Anomalies that can occur in Time Allocation Systems only | 110 |
| 10.1.4 Tas anomaly parameters..... | 111 |
| 10.2 Unchecked anomalies | 111 |
| 10.3 Edit on Outstanding Anomalies form..... | 112 |
| 10.4 Edit on Work Record form | 115 |
| 10.4.2 Hours bands tab..... | 118 |

| | |
|---|------------|
| 10.4.3 Additional payments tab..... | 119 |
| 10.4.4 Miscellaneous tab | 119 |
| 10.4.5 Current shift changes tab..... | 120 |
| 10.5 Employee clock card | 120 |
| 10.5.1 Hours breakdown..... | 121 |
| 10.5.2 Check for hours change | 121 |
| 10.6 Current shift anomalies..... | 122 |
| 10.6.1 Edit a current shift anomaly..... | 123 |
| 11 Employee absence | 125 |
| 11.1 Employee's planned absence..... | 125 |
| 11.1.1 Individual planned absence | 125 |
| 11.1.2 Repeat planned absence..... | 127 |
| 11.1.3 Delete a planned absence..... | 128 |
| 11.2 Absence profile | 129 |
| 11.3 Planned absence for range | 131 |
| 11.3.1 Individual absence for range..... | 131 |
| 11.3.2 Repeated absence for range | 134 |
| 11.4 Error messages and warnings | 135 |
| 11.5 Approve Hours | 136 |
| 12 Generate letters | 141 |
| 12.1 Print letters | 141 |
| 12.1.1 Print a letter for a single employee | 141 |
| 12.1.2 Print a letter for a range of employees..... | 142 |
| 12.2 Email letters | 143 |
| 12.2.1 Email a letter for a single employee | 143 |
| 12.2.2 Email a letter to a range of employees..... | 144 |
| 12.3 Point in time letters | 145 |
| 12.4 Letters referring to multi-line records | 145 |
| 13 Diary..... | 146 |
| 13.1 Maintain diary..... | 146 |
| 13.1.1 Diary entries..... | 147 |
| 13.1.2 Synchronize with Outlook..... | 148 |
| 13.1.3 Clear entries..... | 148 |
| 13.2 Delete diary entries..... | 149 |

| | |
|---|------------|
| 14 Period ends | 150 |
| 14.1 Start a new period..... | 150 |
| 14.2 Edit period dates..... | 151 |
| 14.3 Period cut-off | 151 |
| 15 Overtime reconciliation | 153 |
| 15.1 Overtime reconciliation on employee clock card | 153 |
| 16 Future Work Planner | 154 |
| 16.1 Planner tab..... | 154 |
| 16.1.1 Date range..... | 156 |
| 16.1.2 View period | 156 |
| 16.1.3 Select features | 157 |
| 16.1.4 Modify planned shifts | 160 |
| 16.1.5 Use drag and drop..... | 160 |
| 16.1.6 Use the Current Shift section | 160 |
| 16.1.7 Set up shifts on the work planner | 161 |
| 16.1.8 Home work and away work | 163 |
| 16.1.9 Planner options | 163 |
| 16.2 Rules..... | 183 |
| 16.2.1 Rules tab..... | 183 |
| 16.2.2 Modify group rules on the planner | 184 |
| 16.2.3 Modify individual rules on the planner..... | 184 |
| 16.3 Employee pools..... | 185 |
| 16.3.1 Maintain employee pools | 186 |
| 16.3.2 Employee pools on the planner | 187 |
| 16.3.3 TAS categories for pools | 187 |
| 16.4 Information tab..... | 188 |
| 17 Staff Allocation | 190 |
| 17.1 Introduction | 190 |
| 17.2 Maintain events | 191 |
| 17.3 Set up sub-events..... | 192 |
| 17.3.1 Set up Areas | 192 |
| 17.3.2 Set up Headings | 193 |
| 17.3.3 Add sub-events | 194 |
| 17.3.4 Sub-event custom data | 197 |

| | |
|---|------------|
| 17.3.5 Drag and drop sub-events..... | 198 |
| 17.4 Staff allocation | 199 |
| 17.4.1 Staff allocation status | 200 |
| 17.4.2 Allocate staff to the sub-event | 200 |
| 17.5 Custom event data..... | 201 |
| 17.6 Sub-event templates..... | 202 |
| 17.6.1 Apply job positions to template..... | 203 |
| 17.7 Staff allocation options | 204 |
| 17.7.1 Show original estimate breakdown | 205 |
| 17.7.2 Show planned pay breakdown..... | 205 |
| 17.7.3 Show actual pay breakdown..... | 206 |
| 17.7.3 Mass allocate | 206 |
| 17.7.4 Setup options | 209 |
| 18 Shift setup..... | 211 |
| 18.1 Maintain shifts | 211 |
| 18.1.1 Add a new shift | 211 |
| 18.2 Work shift form..... | 212 |
| 18.3 Work rules..... | 218 |
| 18.3.1 Allowances | 219 |
| 18.3.2 Pay rates..... | 220 |
| 18.3.3 Premiums | 221 |
| 18.3.4 Period hours..... | 221 |
| 18.3.5 Rounding | 221 |
| 18.3.6 Flextime..... | 223 |
| 18.3.7 Anomalies..... | 224 |
| 18.3.8 Special days..... | 225 |
| 18.3.9 Miscellaneous | 225 |
| 18.3.10 Overtime default..... | 226 |
| 18.3.11 Calculations..... | 226 |
| 18.4 Rosters | 227 |
| 18.4.1 Adding a Roster | 227 |
| 18.4.2 Check Weekly Overtime..... | 232 |
| 18.4.3 Name or Personalise | 232 |
| 18.4.4 Setting up a Roster in the Roster Manager..... | 233 |

| | |
|---|------------|
| 18.4.5 Edit a Roster | 234 |
| 18.4.6 Assigning an Employee to a Rotating Roster | 234 |
| 18.4.7 EWTD Test | 236 |
| 18.4.8 Flexitime carryover | 238 |
| 19 Staffing rules..... | 239 |
| 19.1 Maintain staffing rules | 239 |
| 19.1.1 Modify a rule | 239 |
| 19.1.2 Add a new rule | 244 |
| 19.1.3 Delete a rule..... | 244 |
| 19.1.4 Copy a rule | 244 |
| 20 Reports | 245 |
| 20.1 Pre-defined reports..... | 245 |
| 20.2 Run a report | 245 |
| 20.2.1 Select employee range..... | 246 |
| 20.2.2 Select date range | 246 |
| 20.2.3 Print..... | 248 |
| 20.2.4 Display..... | 248 |
| 20.2.5 Email..... | 249 |
| 20.2.6 PDF | 249 |
| 20.2.7 Point in time reports | 250 |
| 20.3 Anomaly report..... | 250 |
| 21 British summer time changes..... | 252 |
| 21.1 Adjust times on clockings..... | 253 |
| 22 Clocking terminals..... | 255 |
| 22.1 Identifying problems | 256 |
| 22.1.1 Current events log..... | 257 |
| 22.1.2 Activity log..... | 257 |
| 22.2 Commands | 258 |
| 22.2.1 Issue a command | 259 |
| 22.2.2 Automatic job scheduler/Command list | 260 |
| 22.2.3 Modify the command list..... | 260 |
| 22.3 Error messages..... | 261 |
| 22.4 Modems | 262 |
| 23 Fingerprint reader | 263 |

| | |
|--|------------|
| 23.1 Enrol fingerprints | 263 |
| 23.1.1 How to enrol a fingerprint | 265 |
| 23.1.2 Complete the enrolment and verify | 266 |
| 24 Processing | 268 |
| 24.1 Start the processing | 268 |
| 24.2 Cancel the processing | 269 |
| 24.3 Instruct the processing to 'catch up' | 269 |
| 24.4 View Poll/Process log | 270 |
| 24.5 Processing messages | 270 |
| 24.5.1 General information messages | 270 |
| 24.5.2 Warnings | 271 |
| 25 European working time directive features | 272 |
| 26 Security | 273 |
| 26.1 User profiles | 273 |
| 26.2 Maintain access groups | 279 |
| 26.3 Web options | 281 |
| 26.4 Report security | 281 |
| 26.5 Hierarchical security | 282 |
| 26.6 Employee web profiles | 283 |
| 26.6.1 Modify an employee profile | 283 |
| 26.6.2 Add an employee web profile | 289 |
| 26.6.3 Delete an employee web profile | 290 |
| 26.6.4 Copy an employee web profile | 291 |
| 26.7 Audit trail | 291 |
| 27 Views | 294 |
| 27.1 Set up views | 294 |
| 27.1.1 Modify a view | 295 |
| 27.1.2 Add codes to a view | 297 |
| 27.2 Assigning views | 298 |
| 27.2.1 User views | 298 |
| 27.2.2 Users assigned to more than one view | 299 |
| 27.2.3 Employee views | 300 |
| 28 Job costing | 302 |
| 28.1 What is Job Costing? | 302 |

| | |
|--|------------|
| 28.2 Real time view | 302 |
| 28.2.1 Current TAS categories for employees | 303 |
| 28.2.2 Hours breakdown..... | 304 |
| 28.3 Projects | 305 |
| 28.3.1 Project wizard | 305 |
| 28.3.2 Select the categories to include..... | 307 |
| 28.3.3 Define valid tasks | 308 |
| 28.3.4 Modify projects | 310 |
| 28.3.5 Project tracking | 310 |
| 29 Escalation | 312 |
| 29.1 Introduction | 312 |
| 29.2 Set up escalations | 312 |
| 29.2.1 System preferences..... | 312 |
| 29.2.2 Define users | 314 |
| 29.2.3 Set path of escalation | 314 |
| 29.3 The escalation process..... | 314 |
| 29.3.1 Check for escalations | 314 |
| 29.3.2 Show escalations..... | 315 |
| 30 Visitor Badge Kiosk..... | 318 |
| 30.1 What is Visitor Badge Kiosk?..... | 318 |
| 30.2 BKManager..... | 318 |
| 30.2.1 Logging onto BKManager | 318 |
| 30.2.2 Main form | 319 |
| 30.2.3 Maintain visitor bookings..... | 319 |
| 30.2.4 Connect to the touchscreen..... | 325 |
| 30.2.5 Visitor arrival filter | 327 |
| 30.2.6 Print settings | 328 |
| 30.2.7 How to find out what version you are running..... | 329 |
| 30.3 Badge Kiosk | 330 |
| 30.3.1 Touchscreen setup..... | 330 |
| 30.3.2 Using the touchscreen | 333 |
| 31 Poller and Processor as a service..... | 346 |
| 31.1 Installation | 346 |
| 31.1.1 Introduction | 346 |

| | |
|--|------------|
| 31.1.2 Installation files | 346 |
| 31.1.3 Local installation | 346 |
| 31.1.4 Remote installation | 347 |
| 31.1.5 Un-installing | 347 |
| 31.1.6 System tray monitor | 348 |
| 31.1.7 Service parameters window | 348 |
| 31.2 General system use | 349 |
| 31.2.1 Logging in | 349 |
| 31.3 Poller | 350 |
| 31.3.1 Poller main form | 350 |
| 31.3.2 Automatic job scheduler | 351 |
| 31.3.3 Start/Stop Poller..... | 354 |
| 31.3.4 Printer setup | 355 |
| 31.3.5 Options menu | 356 |
| 31.3.6 On site reports | 357 |
| 31.4 Processor..... | 357 |
| 31.4.1 Processor main form..... | 357 |
| 31.4.2 Automatic job scheduler | 358 |
| 31.4.3 Start/Stop processor | 360 |
| 31.4.4 Printer setup | 361 |
| 31.4.5 Options menu | 362 |
| 31.4.6 Processor setup..... | 362 |
| 31.6 Version help | 363 |
| 32 Troubleshooting | 364 |
| 32.1 Errors and error messages | 364 |
| 32.1.1 Input errors | 364 |
| 32.1.2 Processing errors..... | 365 |
| 32.1.3 Program errors..... | 365 |
| 32.2 Invalid parameter errors | 365 |
| 32.3 Frequently asked questions | 367 |
| 32.4 System information..... | 374 |
| Index | 377 |

IMPORTANT NOTICE

Before you use Mitrefinch TMS we wish to stress the importance of keeping back-up copies of your programs and data.

We advise that you follow this rule:

WHENEVER YOU FIND YOURSELF WITH ONLY ONE GOOD OR UP-TO-DATE SET OF DATA OR PROGRAMS, COPY IT AT THE FIRST OPPORTUNITY.

At Mitrefinch we will happily give support and advice to every licensee of Mitrefinch TMS under maintenance contract, but it is **YOUR** responsibility to observe our rule on keeping back-ups.

1 Introduction

The Mitrefinch Time Management System (TMS) is a complete Time and Attendance software package. Its aim is to provide you, as the user, with meaningful employee information. This information is divided into such categories as basic and overtime hours worked, shift patterns, holidays and other entitlements, authorised/unauthorised absences, on-site/off-site reports and access control. TMS can be used to produce reports for both payroll and managerial purposes.

TMS also includes features that support the European Working Time Directive regulations (e.g., 48 hour week rules). For details see **European Working Time Directive Features** on page 272.

1.1 Aim of the user guide

This User Guide is intended to assist in the general day-to-day running of TMS. It contains details of how to perform the basic functions needed to run TMS. This includes:

- those that are used every day (e.g., starting the Process task);
- those needed on a less frequent but regular basis (e.g., performing a weekly or monthly period ends task, or updating the holiday entitlements at the end of the year);
- those done occasionally, as and when they are needed (e.g., adding a new employee, or changing an employee's badge number).

As the manual is a guide to the general running of TMS, it does not cover such items as:

- the setting up of TMS;
- the introduction of new features;
- the use of special programs.

1.2 Structure

The **Employee maintenance**, **Group maintenance** and **Mass change** chapters cover various functions that can be found on these respective menus in TMS itself. Other functions are given separate chapters, so that important areas of the system are covered in greater depth. The manual explains how to access each TMS function, and how to use the different options within it. You will also find documentation of the **Performance Management** add-on module, which allows you to track the productivity of your organisation and employees.

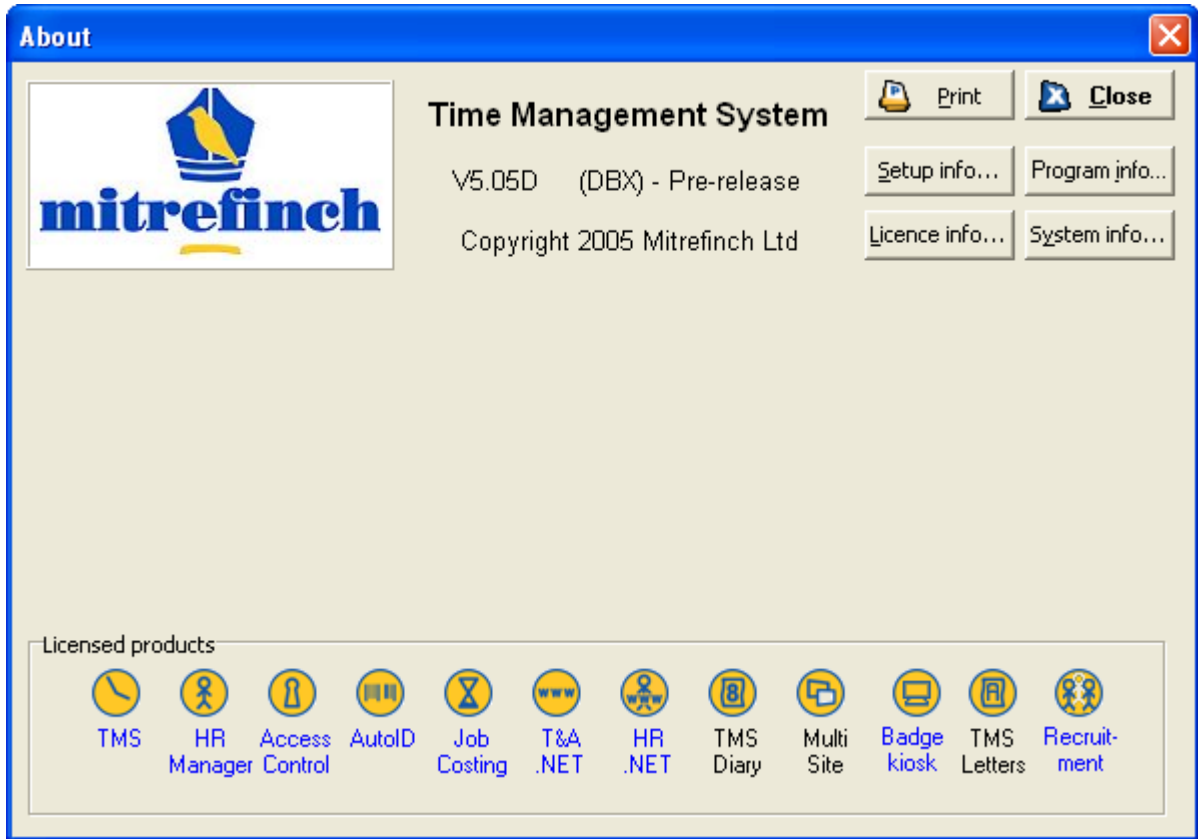
Any common problems and error messages that occur regularly in a particular area of the system will either be discussed in the appropriate chapter, or explained in the **Troubleshooting** chapter (see page 364).

NOTE: Many of the options detailed in this manual can be defined differently for each individual company. For example, this manual uses the word **Roster** when discussing a pattern of shifts, while on your system it may be defined as **Rota**. In addition, some of the forms and tables pictured in this manual may have a different layout to the ones displayed on your screen. These differences are due to the fact that your system will have been tailored to suit the individual requirements of your organisation, whereas this manual details a standard TMS application.

If the form layouts and options do differ from those in this manual, do not panic, because the methods of accessing and using the functions are the same for every system.

1.3 How to find out which version you are running

To find out the **TMS** version, select **About** from the **Help** menu on the main TMS toolbar. The following form will be displayed (if you have an older TMS version this form may differ):



Notice the program icons at the bottom of the form. If the lettering beneath the icon is coloured blue you can click on a hyperlink to open a corresponding page of our web-site.

2 System specification

2.1 Software

| | |
|---------------------|--|
| Version: | |
| Installed on: | |
| Mitrefinch contact: | |
| Phone: | |
| Employees: | |

Modules

| | |
|------------------|---------------|
| Report Generator | |
| Time Allocation | |
| Auto ID | Version _____ |
| F.E.S. | Version _____ |
| Master Clock | |

2.2 Hardware

| | |
|-------------------------|------------------|
| PC - TMS | |
| Make: | Model: |
| Floppy disk: | |
| Drive TMS installed on: | Under directory: |
| System backup media: | |
| Printer | |
| Make: | Model: |

| | |
|----------------------------|--------------|
| PC - F.E.S. | |
| Make: | Model: |
| Hard disk: | Floppy disk: |
| Installed under directory: | |
| Master clock: | |
| Printer | |
| Make: | Model: |

2.2.1 Clocking terminals

| | | |
|-------|--------|--------------|
| Make: | Model: | Reader type: |
|-------|--------|--------------|

| Terminal ID | Location | No. of readers | Comment |
|-------------|----------|----------------|---------|
| 1 | | | |
| 2 | | | |
| 3 | | | |
| 4 | | | |
| 5 | | | |
| 6 | | | |
| 7 | | | |
| 8 | | | |

2.4 Training log

| | | |
|---|----------|----------|
| 1 | Date: | Trainer: |
| | Topics: | |
| | Present: | |
| 2 | Date: | Trainer: |
| | Topics: | |
| | Present: | |
| 3 | Date: | Trainer: |
| | Topics: | |
| | Present: | |
| 4 | Date: | Trainer: |
| | Topics: | |
| | Present: | |
| 5 | Date: | Trainer: |
| | Topics: | |
| | Present: | |
| 6 | Date: | Trainer: |
| | Topics: | |
| | Present: | |
| 7 | Date: | Trainer: |
| | Topics: | |
| | Present: | |

3 General system use

This manual assumes that you have a basic knowledge of a Windows®-based package and that you know how to drag and select text using a mouse.

There are various functions of the system that you will need to use across the system, for example, selecting a range of employees, or using calendars to select dates. The basic operation of these features and others is explained in the following pages.

3.1 Standard and customised systems

The following chapters document all the standard employee details - i.e., the information stored on a standard system. However, your system may have been set up with customised panels or fields, specific to your own organisation, in addition to the standard information. As these are custom settings, they are not covered in this manual. It may also be the case that some of the forms documented do not appear on your system, as they are not considered appropriate for your company.

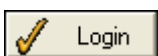
3.2 Logging on

When TMS is selected, the login screen will be displayed:

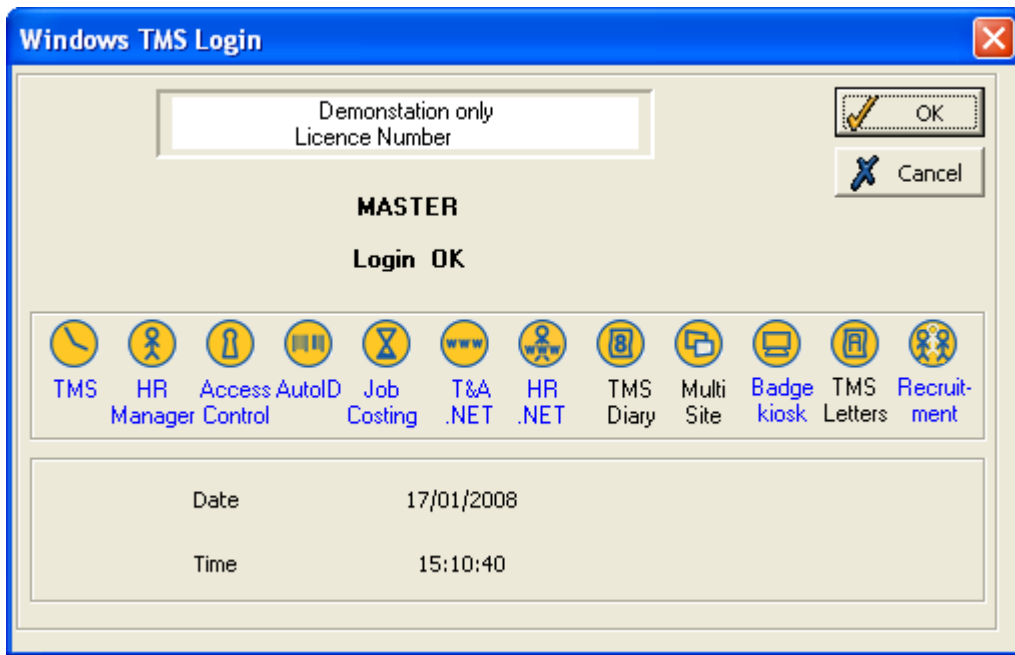


Enter your user name and password. The default user name is 'MASTER' and the default password is 'PASS'.

Then click the **Login** button:



This produces a screen similar to the following:

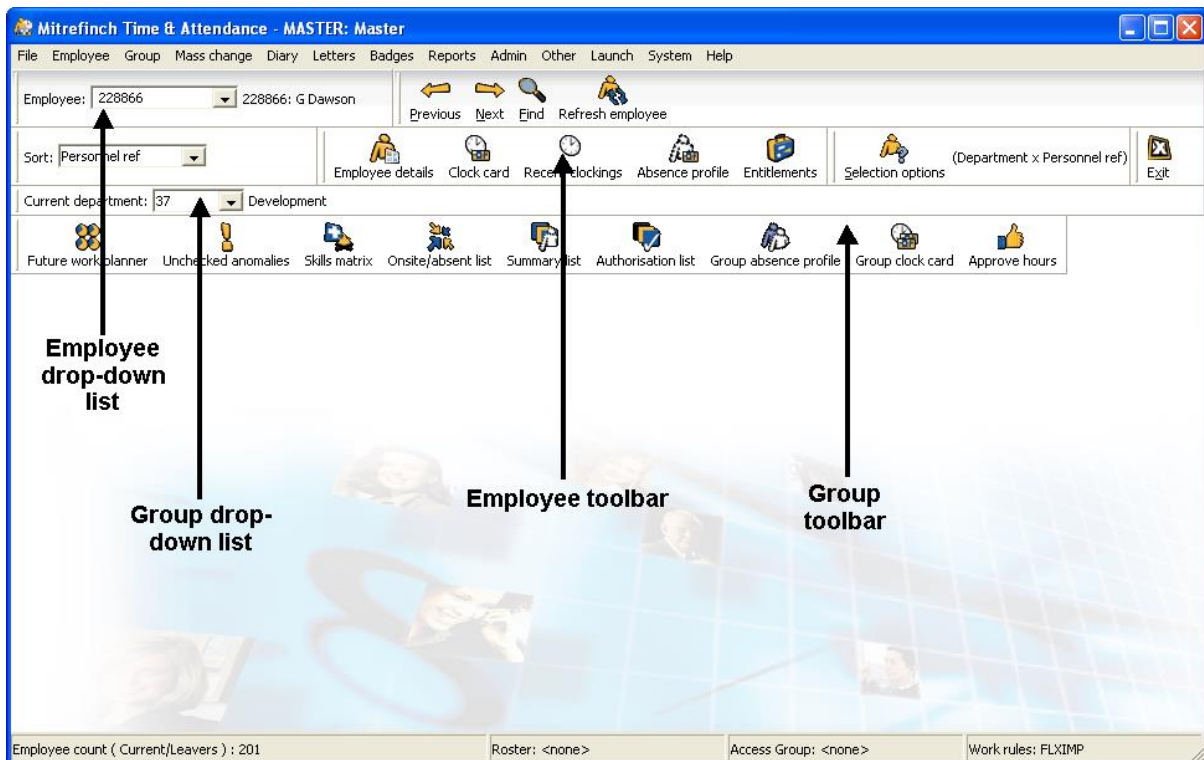


Notice the program icons at the bottom of the form. If the lettering beneath the icon is coloured blue you can click on a hyperlink to open a corresponding page of our web-site.

Click **OK** to enter the system.

The main form appears, from which you can access all areas of the system.

3.3 Main form



This is the main screen of TMS, although the form on your screen may differ in appearance. This depends on two factors:

- your access rights - your system administrator determines which areas of the system are accessible, and which areas are restricted.
- the system preferences - various elements of the display can be customised, and features can be added or removed, according to individual requirements.

From this screen you can access all the main functions, using in particular the key areas of the system: the two drop-down lists on the left which allow you to select an employee and a group, and the two toolbars on the right, containing icons, which provide access to the most commonly used parts of TMS.

See **Select an employee** (below) and **Select a group** (page 24).

The employee toolbar contains the most common functions you will need to use for accessing individual employees' information. Clicking on the large icons provides entry to the functions for the currently selected employee.

Similarly, the group toolbar contains icons representing the most frequently needed areas for dealing with groups on TMS. Most of the options will open displaying the details of all employees in the currently selected group, although some will first open a **Select range** box (see page 28), which must be used to select the group to view.

Any functions that are not represented by icons on the main form can be accessed from one of the menus at the top of the screen.

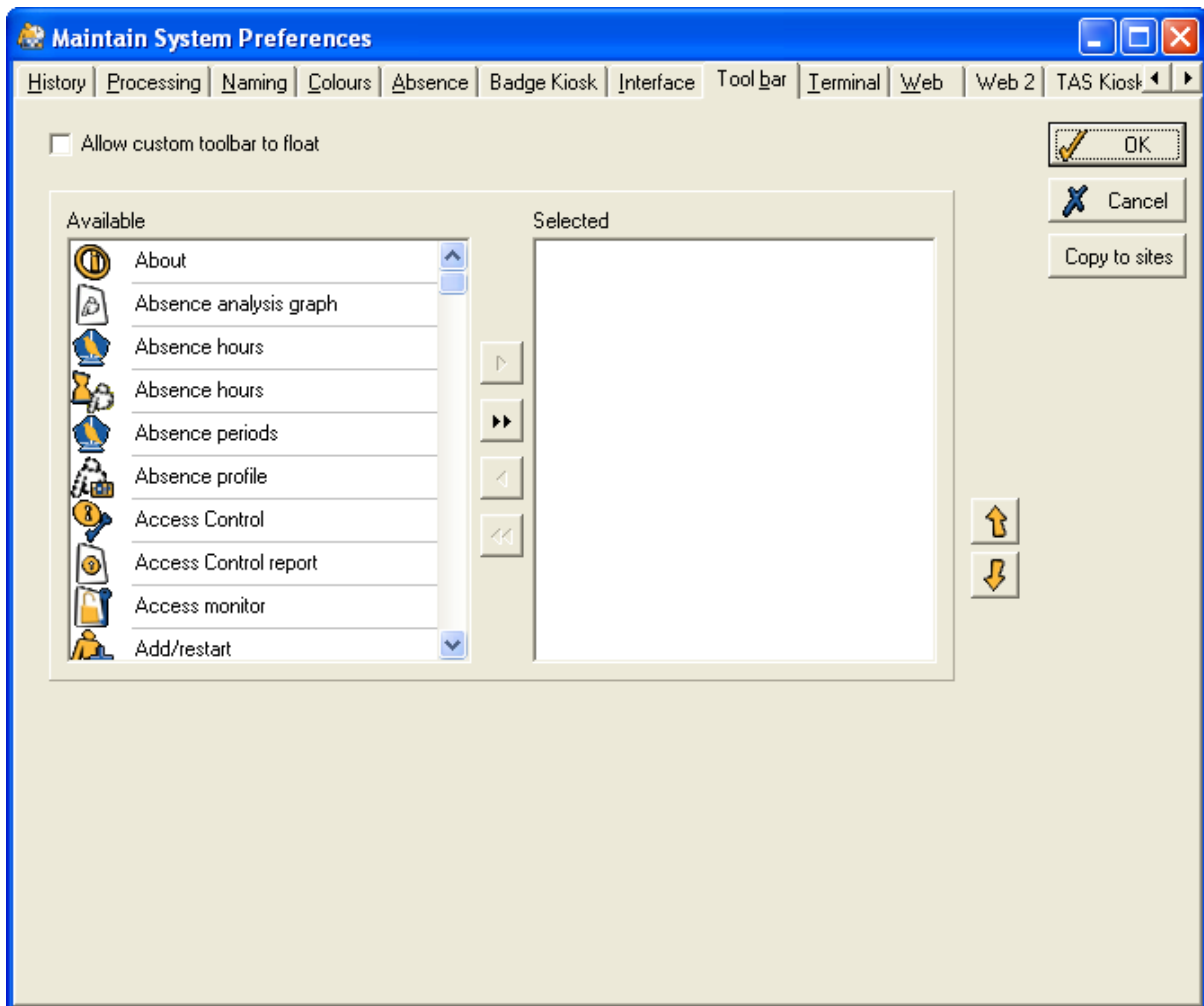
To alter the display or content of the **Employee** and **Group** drop-down lists, see **Selection options** (page 24).

3.4 Custom toolbar

The preferences enable you to customise the user-defined toolbar. The user-defined toolbar can be displayed on the main form in addition to (or instead of) the **Employee** and **Group** toolbars. It can be useful to add icons to this toolbar for the functions you find yourself accessing most frequently, as it may save time searching for the function on the different menus.

To display the custom toolbar, open the **Other** menu and go to **Display**. A sub-menu opens, on which you should make sure **Custom tools** is ticked.

To customise this toolbar, select **Local preferences** from the **Other** menu, or open **Maintain system preferences** from the **System** menu, and click the **Toolbar** tab. The form looks like this:



Use the arrows to select which icons will be displayed on your user-defined toolbar, and in which order (for details, see **Select available items**, page 31).

Once you have finished customising your user-defined toolbar, click **OK** to save the changes and close the form.

3.5 Select an employee

To view or edit the details of an individual employee from all those registered on the system you must first select the required employee. There are two ways of selecting an employee.

If you know the required employee's name, the easiest way to select him or her is to use the drop-down list marked **Employee**, on the left-hand side of the screen:

Employee: ▼ 882255: Richard Symonds

To select the previous or next employee in the list, use the buttons above the list:



The sort order of this list can be altered at any stage by choosing a new entry from the **Sort** drop-down list:

In this example, the list can be ordered by personnel reference number, surname, first name, work rule, shift or second address.

To make more complex alterations to the display and content of the list, see **Selection options** (page 24)

Find

Should you know some details about an employee, e.g. NI number, without knowing the employee's full name, you can find the required person by selecting **Find** from the **Employee** menu, or by clicking this icon:



Enter the details you know into the relevant boxes (you can also enter part-details, e.g., if you know an employee's reference number begins with 2244, then entering this into the **Personnel ref** box will display all those whose numbers contain '2244'), then click **Find**, which will bring up a list of all employees matching those criteria:

| Personnel ref | Surname | Initials | Known by | Date of birth | NI number | Health Scheme |
|---------------|-----------|----------|----------|---------------|-----------|---------------|
| 224466 | Patterson | J | | | | |
| 224488 | Henderson | C | | | | |

Select the required employee, then click **OK**, and the selected employee will be displayed in the **Employee** drop-down list, allowing you to view various details about him or her, and make any amendments to the employee's record.

Click the **Configure** button to display the following form:

You can select extra search criteria for the **Find employee** form by selecting extra fields from the drop-down lists on the form above. In the above example, the field 'CE.HEALTH' (Health scheme) has been added.

3.6 Select a group

Current department: Accounts

Select a group from the **Group** drop-down list, marked 'Current department', on the left of the screen, and the selected department's number will be displayed in the box. You are now able to view and edit the details of all employees in the selected group.

(Depending on the settings, employees might be grouped differently, e.g., by location or company, rather than by department. See **Selection options**, page 24, for details of this, and other ways of changing the layout and usage of the drop-down list).

3.7 Selection options

To change the way employees and groups are selected, click this icon on the main screen:



This will produce a form similar to the following:

Any changes made on this form affect the way employees and groups are listed on the main screen.

Employee selection

On the top section of the form, tick the boxes for each category of people you wish to include in the **Employee** drop-down list. Tick as many boxes as required, so that, for example, non-employees and future starters are shown alongside current employees.

Should you wish to define a new category of employees, tick the **Advanced view** box and click the button to the right:



A form is displayed, which can be used to create a new category.

A description of the selection that has been made (e.g., 'Current/Future starters') will remain on the main screen, to the right of the **Selection options** icon, after this form has been closed.

Employee edit

This section of the form allows you to change the way the **Employee** drop-down list is displayed on the main screen. The **Group sort order** and **Employee sort order** boxes show the order in which the list is sorted. On the above example, the group sort is by department, and the employee sort by surname. This means that all employees in the first department will be at the top of the list, sorted by their surnames, followed by all the employees in the second department, and so on.

Both sort orders can be changed by selecting a different option from the drop-down list. To sort the list purely according to the employee sort, leave the **Group sort order** blank. For example, if no group

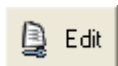
sort order is entered, and 'Surname' is the **Employee sort order**, the employees will be sorted alphabetically by surname, regardless of group. However, although **Group sort order** can be left blank, an entry must be selected for the employee sort.

To change the options available in the two sort order drop-down lists, click the button to the right:



This brings up the following form:

The **Grid fields**, **Sort fields** and **Group fields** boxes contain the options currently in the respective sort order lists. Clicking this button:



next to the appropriate box shows a list of alternative sort-options, which can be selected using the arrows (see **Select available items**, page 31) Select available items

Click **OK**, and any additional selections will appear in the relevant box.

Then click **OK** to return to the **Employee selection options** page, where the new options can be chosen from the appropriate sort order drop-down list.

The three tick-boxes in the 'Employee edit' section of the form affect the workings of the **Employee** and **Group** lists on the main screen:

- **Show group sort in employee edit** - when this is ticked, the **Employee** drop-down list will display the employee's group (as defined by the group sort order) alongside the other employee details.
- **Only show employees in group** - this limits the **Employee** drop-down list to the members of the currently selected group. When this is not ticked, all employees will always be shown on the list, regardless of which group is selected.
- **Synchronise group and group sort** - when ticked, this means that the option entered in the **Group sort order** box for the **Employee** list is also entered automatically as the sort-order for the **Group** drop-down list. When left empty, the selection for the group sort order only controls the layout of the Employee list.

Group

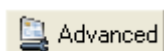
This section controls aspects of the **Group** drop-down list on the main screen.

Use the box marked **Group** to select the definition of a group (e.g., department or location).

(If the 'Synchronise group and group sort' box above is ticked, the selection in the **Group** box cannot be changed, because the group sort order is automatically replicated in the Group box. The 'Synchronise group and group sort' tick box must be cleared if you wish to change the entry in the Group box.)

There are two further tick-boxes in the 'Group' section:

- **Synchronise group to employee** - when ticked, the **Group** drop-down list on the main screen cannot be manually changed, because it will always display the group of which the currently selected employee is a member, and will change automatically if you select an employee from a different group.
- **Extended group select** - if this is ticked, the **Group** drop-down list on the main screen will display in grey, indicating that it has been blocked off. This means that no group is 'selected' on the main screen; instead, every time a group function (i.e., one from the **Group** menu or **Group** toolbar) is selected, the **Select range** form will appear (see page 28), and you should use this form to select the employees to include in the task you are performing.
- **Show empty groups** - if this is ticked, empty groups will be displayed in the **Group drop-down list**.



This brings up the following form:

This form contains a list of the extended group select selection fields. You can edit this list by clicking the **Edit** button and then making the necessary adjustments.

3.8 Select range

When opening certain parts of the system, the following box is displayed, allowing you to define which employees or departments to view:

Click one of the four boxes when choosing the range of people to include:

- **Single** - select one person from the **Employee** drop-down list.
- **All** - the drop-down list will disappear, as the function will include all employees on the system.
- **Range** - this allows you to include, for example, all employees in a certain department, or in a range of departments.

In this example, the selection would cover all employees in Department 1. Changing the **End** value to 5 would include all employees in Departments 1 to 5. Change the **Select by** entry to 'Employee' to include a range of employees, selected by their employee numbers. There are also numerous other options to 'select by'.

NB: Whenever you are selecting a range in this manner, you must ensure that the **Start** value appears on the drop-down list before the **End** value. For example, selecting Department 5 as the **Start** and Department 1 as the **End** will produce an invalid range, which will not allow you to proceed.

- **Extended** - this will offer a new drop-down list, marked **Add selection item**. A selection may include, for example, all employees in departments 31, 35 and 42, as well as two individuals from other departments, with reference numbers 320029 and 410011.

Add selection item

Department Select single Select from list

Clear

History

Selection

Qualify current item Add new items

First, select 'Department' from the drop-down list, then click **Select from list**. This displays a pop-up box allowing you to select the required departments. When selecting multiple items, hold down the 'Control' button on the keyboard and click each item you wish to select, which will be highlighted in blue when selected.

Select

Please select

| | |
|---|-------------|
| 1 | Accounts |
| 2 | Admin |
| 3 | Factory |
| 4 | Warehouse |
| 5 | Projects |
| 6 | Support |
| 7 | Hardware |
| 8 | Development |
| 9 | Sales |

OK

Cancel

Click **OK**, and the departments you have selected will be shown on the screen.

Add selection item

Department

Selection

Qualify current item Add new items

Department: 1,6,8

Having selected the departments you wish to include, you must now add the two other employees. Change the **Add selection item** to 'Employee', and select the individuals by clicking **Select from list**, and choosing them in the same way you chose the departments. (You may find it easier to add the employees in a different way. Click **Select single**, to display the following box:

Select employee

Employee

<none>

Use the drop-down list to change **Sort** to 'Personnel ref', then type a relevant number in the **Employee** box and click **OK**. This removes the need to scroll through a long list of employees.)

The employee will be displayed alongside the departments, as the selection.

Add selection item

Employee

Selection

Qualify current item Add new items

Department: 1,6,8
Employee: 888222

History

Should you wish to select the same range as one you have used recently, click **History** to display a drop-down list of recent selections. This button remains on-screen throughout the **Extended** employee selection process.

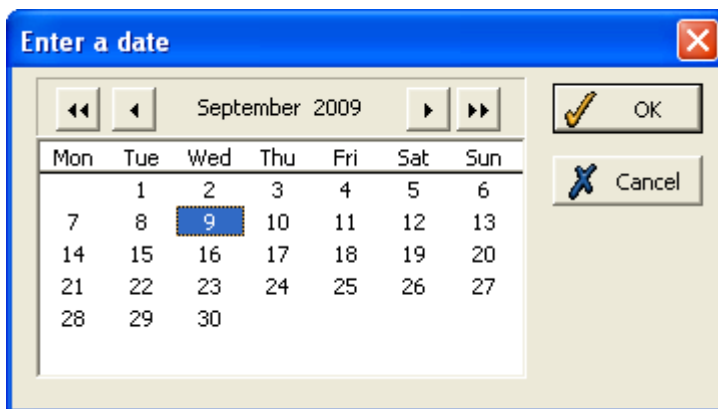
To remove your selections from the box, and to start the selection process again, click **Clear**. Once you have selected the required employees, click **OK** to perform the task.

3.9 Select a date

When you are required to select a date, there is usually more than one way of doing so. You can type the date into the box provided, but often the easiest way is to use the calendar button, to the right of the box:



Click on this to display a calendar for a month:



The calendar will display the current month, unless a date has been selected previously, in which case the calendar will display the month of the previously selected entry.

If the date you need to enter is from a different month to that shown on the calendar, use the arrows to move to the required month:

- previous month; - next month;

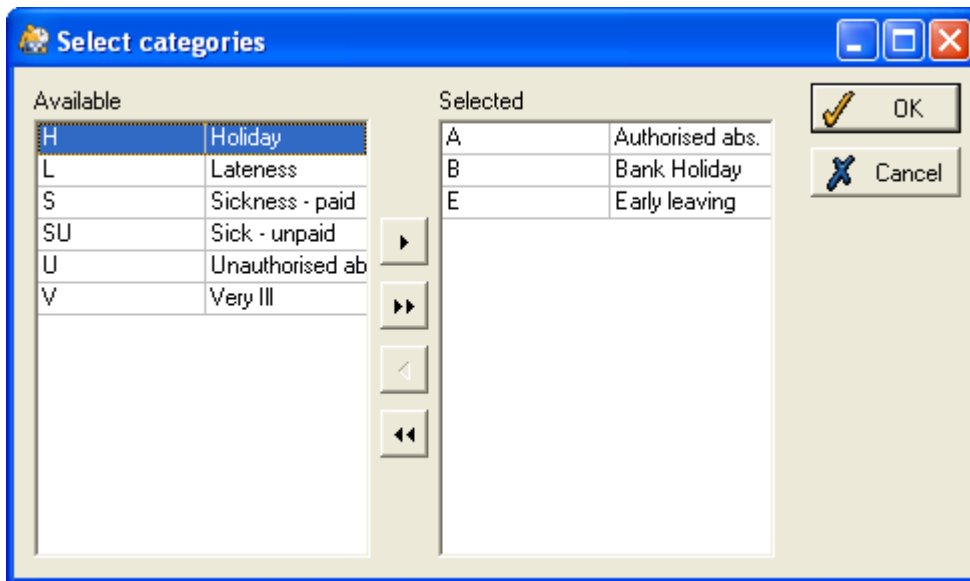
- previous year; - next year.

Once the calendar shows the month that you require, select the day by clicking on it, making it highlighted in blue. Then click **OK**, and the highlighted date is the new entry in the box.

3.10 Select available items

On a number of occasions, you will have the opportunity to move items between an **Available** box and a **Selected** box. One such occasion is when selecting which absence types are to be displayed on the **Absence profile** in TMS, although the same principle applies to all times when you use the **Available and Selected** boxes.

The form will look similar to this:



Move the categories you wish to be displayed from the left-hand box (**Available**) to the right-hand box (**Selected**) by clicking on the required category (highlighting its background in blue), and then clicking on the single right-pointing arrow:



The category will now appear in the right-hand box. Repeat this for each type you wish to display. Alternatively, if you wish to view all the categories, you can simply click the double right-pointing arrow:



to move all the types into the **Selected** box.

Remove categories from the **Selected** box to the **Available** box in the same manner, but using the left-pointing arrows.

Click **OK** to view the selected absence types.

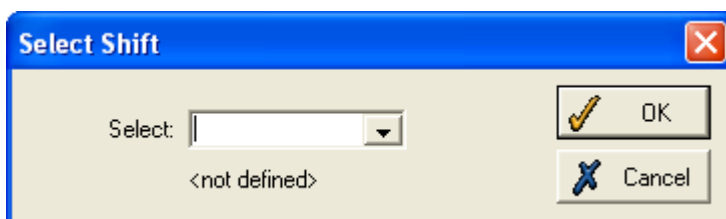
3.11 Using drop-down lists

While using the system, you will frequently need to make a selection from a list of possible options. Wherever this arrow button:

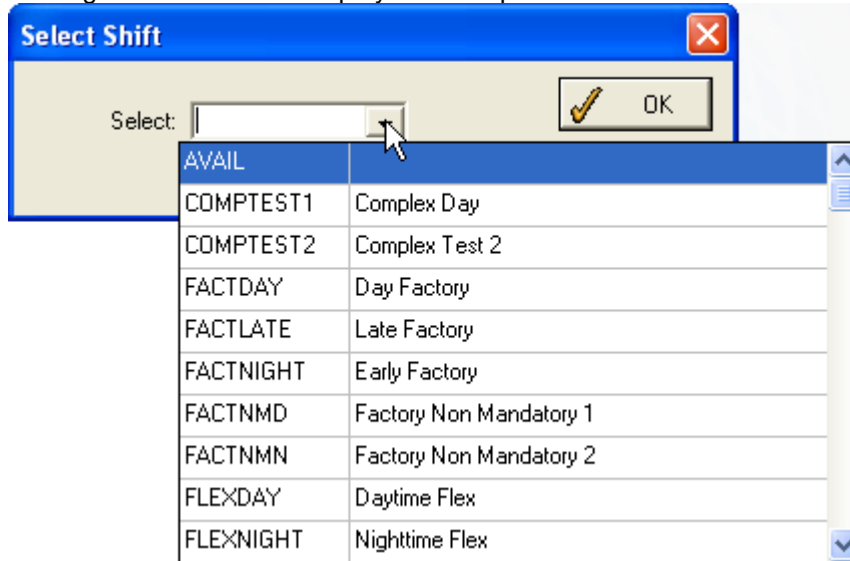


appears to the right of a box, you do not need to type in any details, but should click the arrow to display the list.

On the example below, taken from the **Future Work Planner**, you are prompted to select a shift:



Clicking the arrow button displays a list of possible shifts:



Click on the required shift, and it will appear in the box as your selected shift.

On the example below, taken from the **Personal details** form, three boxes have drop-down lists, for you to select the correct information:

Title:
 Sex: Male
 Disability:

Clicking the arrow button displays a list of possible options:

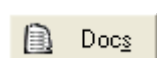
Title:
 Sex: Male
 Disability:
 F Female
 M Male

Click on the required option, and it will appear in the box as the selected information.

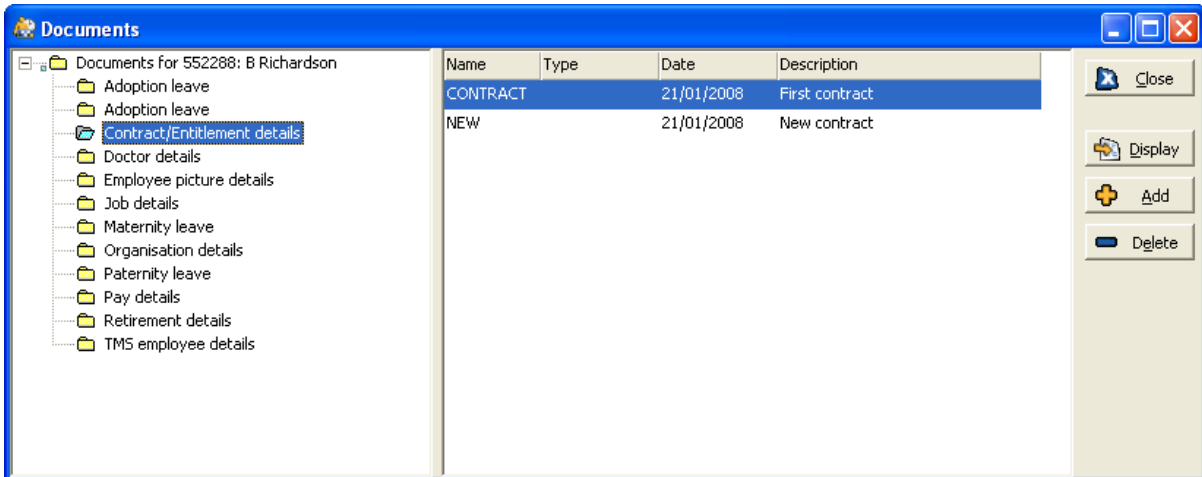
NB: In some functions, the arrow is hidden until the box is selected. For example, on the **Planned absences** form, drop-down lists are available to allow you to select a new absence type, but are only visible when you have clicked on the relevant box. Clicking once on the box reveals the arrow, which you should click to display the list.

3.12 Documents

It is possible to store documents against forms within the system. For example, you can pin documents relating to an employee to the relevant **Employee details** form. Throughout the system, documents can be accessed via the **Docs** button:



When this button is clicked, a form similar to the following should be displayed:



In the above example, documents are listed against employee 'B Richardson'.

Notice the tree diagram in the left-hand pane of the above form. The folders that make up the diagram relate to different parts of the system, allowing you to file documents neatly in a relevant place. When a section of the tree diagram is selected, the corresponding documents will be displayed in a list in the right-hand pane of the form. In the above example, there are two documents stored against 'Contract/Entitlements'.

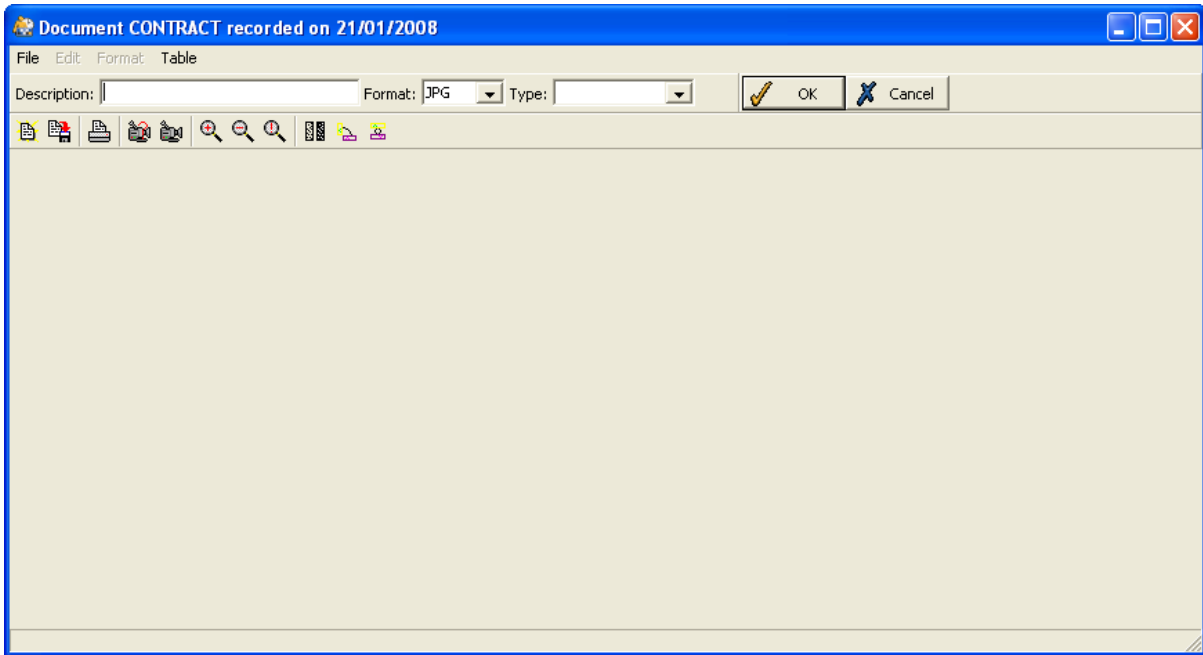
When you double-click on the documents displayed in the right-hand pane of the form above, the document will be displayed.

Note: if the employee has specific skills against their name, an additional folder **Employee skills** will appear in the tree diagram.

3.12.1 Add a document

To add a document choose a relevant part of the tree diagram and then click the **Add** button. The following form should be displayed:

Enter a name for the document and then click **OK**. The following form should be displayed:



You can enter an appropriate **Description** for the document, the **Format** of the document and the **Type**. If you want to import a document from outside the system, select the **File** menu and then select **Open** and find the relevant document. When you have selected a document, click **OK**.

According to the **Format** of the document in question, the appearance of the above form alters slightly and different options are available:

Jpeg

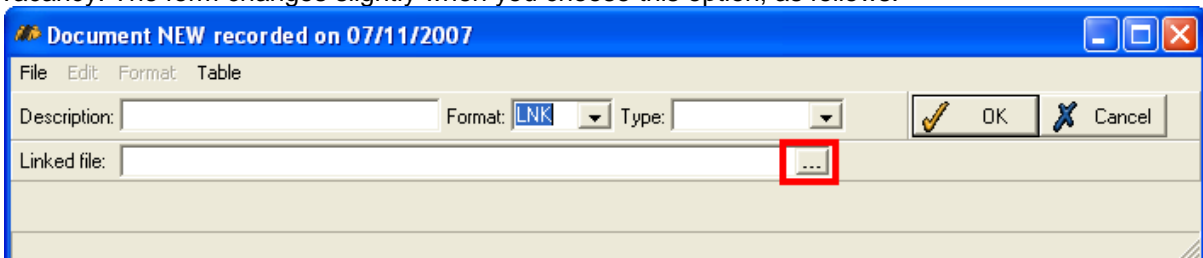
This option could be useful for storing a photograph of an applicant or a scanned application form. Notice the toolbar that appears when you choose to upload a jpeg:



Hover your mouse over these buttons for a tool-tip explaining their functions. You can use these buttons to edit a jpeg image.

Link to external document

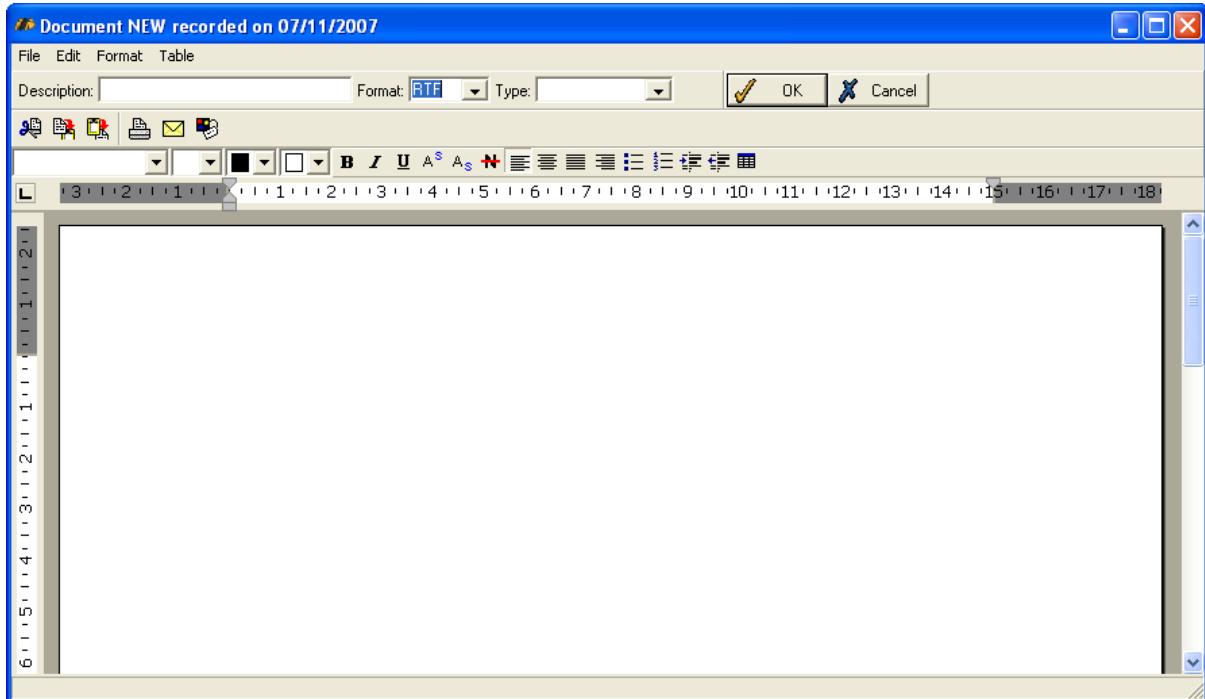
You can record a link to an external document to be stored against an applicant, application or vacancy. The form changes slightly when you choose this option, as follows:



Click the calendar button highlighted red in the example above. This will allow you to select the required external document.

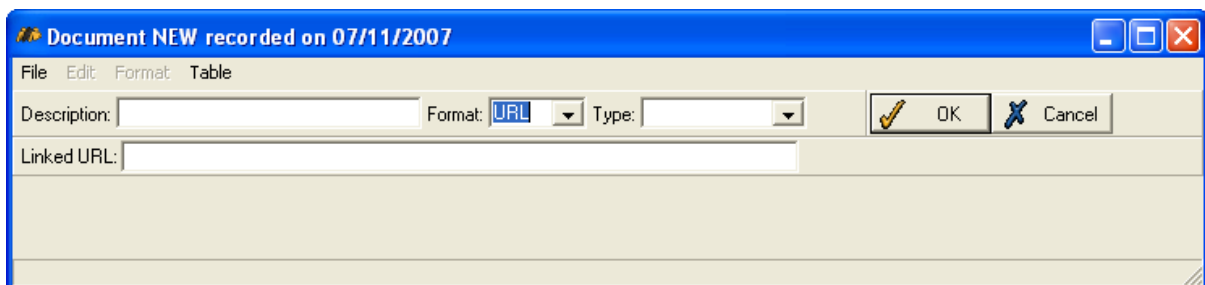
Rich text format

You can store a document in rich text format and also compose the document within the form, as shown below:



Universal resource locator

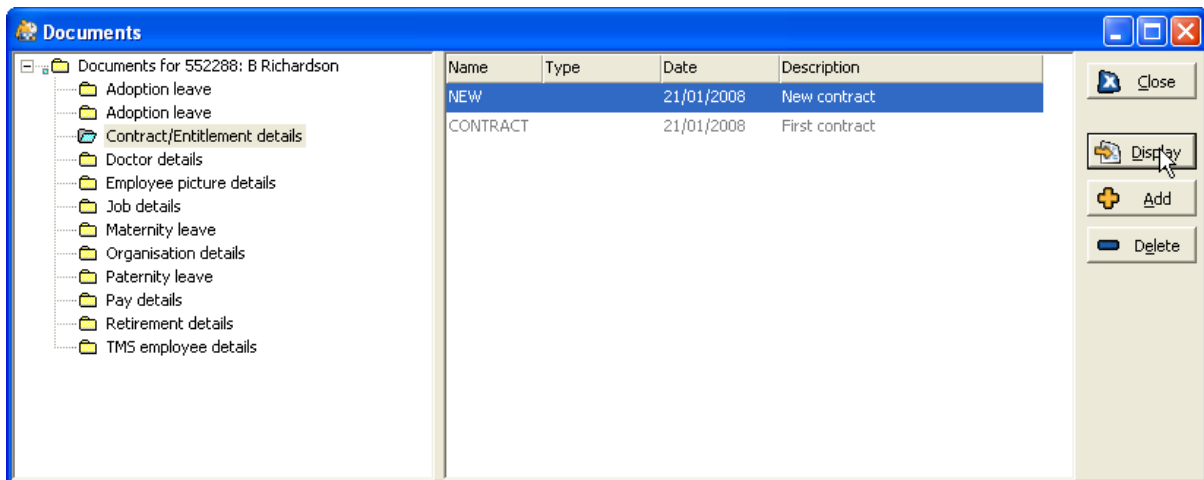
Finally, you can store a link to a URL against an applicant, vacancy or application. When you choose this option, the form alters as follows:



Type the relevant URL into the **Linked URL** field.

3.12.2 Display a document

You can display a document stored in the system in two ways. Firstly, simply double-click on the document listed in the right-hand pane of the main **Documents** form. You can also select the document and then click the **Display** button as demonstrated below:



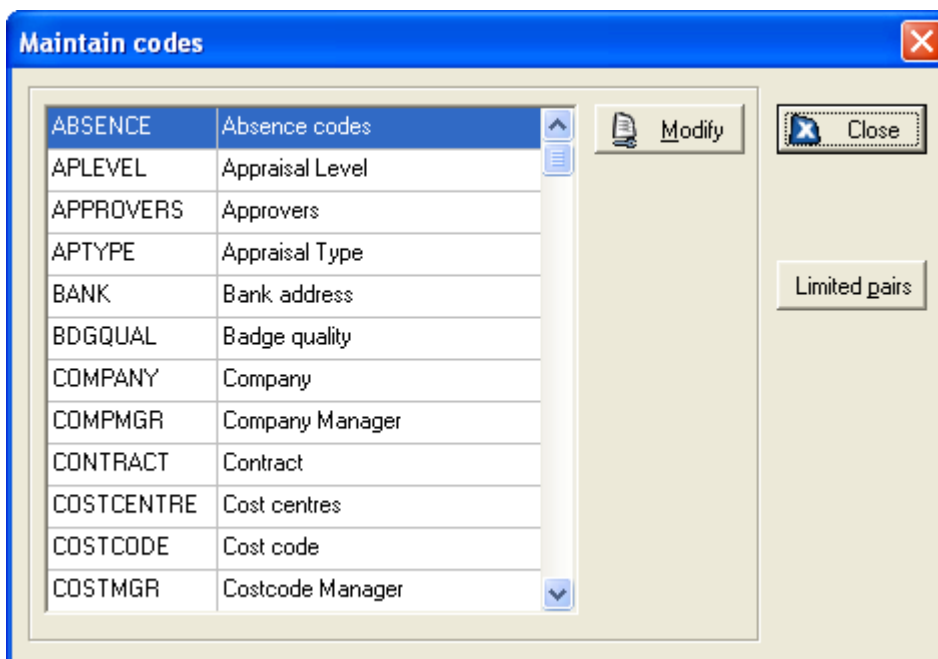
3.12.3 Delete a document

To delete a document, simply select it in the right-hand pane of the **Documents** form and then click the **Delete** button. You will be asked to confirm your action.

3.13 Maintain codes

Codes are used to enable you to enter and maintain employee details.

To amend the codes on your system, select **Maintain codes** from the **System** menu, and a table like this is displayed:



This list contains all the fields of employee details that are kept on your system. You can make amendments to the list of codes stored as possible entries for each field. To do so, select the required field, and click **Modify**. A table like this is displayed (on this example, **Department** was selected):

| Code | Description | Cross-ref | Flexipay code | Employee view |
|------|-------------|-----------|---------------|---------------|
| 1 | Accounts | 1 | | ACCDUNTS |
| 2 | Admin | 2 | | ADMIN |
| 3 | Factory | 3 | | FULL |
| 4 | Warehouse | 4 | | PRODUCTION |
| 5 | Development | 5 | | FULL |
| 6 | Support | 6 | | FULL |
| 7 | Leavers | 7 | | |

The table includes all the possible entries for an employee's department (as seen on the drop-down list on the **Employee details** form), with the code itself, the description, and a cross-reference value for TAS clockings, if relevant to your system.

Rename a code

If you wish to change the code used by an existing entry, select the required code and click the **Rename** button. This allows you to enter a new code, which will automatically become the new code for all employees using this value.

Merge codes

The **Merge** button allows you to combine two separate codes. Select one of the codes, click **Merge**, and then you are able to select the other code. The code selected first will disappear, with all the employees using it being added to the other code.

Modify codes

To edit the list in any other way, click the **Modify** button. You are now able to change the **Description** which applies to the code.

To insert a new code, either click on the white arrow in the left-hand column, and select **Insert entry**, or use the blank row at the bottom of the list to enter the details.

If you need to delete a code, click on the left-hand column next to the relevant code, and select **Delete entry**. Before you delete the code, you must ensure that it is not being used by any employees. Click the **Find use** button to find out which employees are using the selected code.

Automatic calculations and limited values

The different employee details are connected, so that entering one detail may affect other sections, even on other forms. For example, altering an employee's contract information may affect the pay details which the system can calculate automatically, according to your system settings.

Any information calculated automatically can be amended manually, if necessary.

Other entries can affect the options in a drop-down list for another entry. For example, selecting a job grade may limit the range of job titles you can choose from.

These calculations and values should have been set up by your system administrator.

3.14 Using Edit and Update

When entering employee details, you will be able to use either the **Edit** or **Update** button. It is important to understand the difference, which is best explained by the following examples:

a) You enter details for a new employee and later realise that the surname is spelt incorrectly.

To correct the mistake you would use **Edit**, as this simply overwrites existing information and keeps no record of what was there previously.

b) An employee informs you that she is to be married and will change her surname.

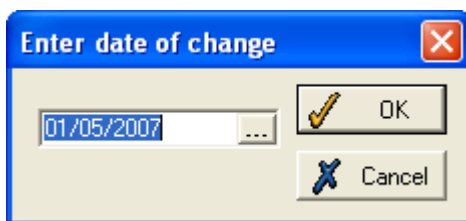
In this case you would use **Update** because you want to keep a record of the previous surname and also of the date of change. You are not correcting a mistake but actually updating the information.

3.14.1 When to use Update

This ensures that a record of the change is kept in the system.

You may be adding information that is to take effect immediately, or you may be entering a future change. If necessary, you can 'update' information in the past but only in certain fields. If the field does not accept a past date, and a past date has been entered, this value will become the current value. If you enter a future date, the value will become the current value only on that date.

To update, click the **Update** button, and you will be prompted to enter a **Date of change**:



This can be a current, future or past date. When you enter a date, you will be presented with the form as it was on the selected date, based on existing information. You may then enter the correct information.

NB: Date fields which are labelled **From** will automatically change to reflect the effective date of change for each field. You should never need to change these dates yourself.

The advantage of using **Update** is retaining a record of the change. For details on accessing this record, see **Viewing historical information**, page 40.

3.14.2 Using Update for a future change

Enter the future date as the **Date of change**. You will be presented with the form showing the information as it will be on that date, based on any information the system already holds. Make the necessary changes. When you click **Apply** to save the changes, the panel will display current information (i.e., not showing the change you have just made) but the change can be viewed using field or screen history and will automatically take effect on the due date.

For example:

An employee is moving house and provides a new address 3 weeks beforehand. You may enter the new address immediately by clicking **Update** and entering the effective date of change. The actual date of the address change is entered, but the display panel for the current information will not show the new address until the effective date.

3.14.3 Using Update for a past change

Click on **Update** and select the past date when prompted. You will be presented with the information as it was on that date, based on the information the system holds. Make the necessary changes. When you click on **Apply** you will again see current information, which will only include the change you have just made if that change is still current, (i.e., no more recent amendment has been made to the data).

Consider the following examples:

You currently have an employee shown as being a Production Manager since 01/04/2007. You know that prior to that date she was a Production Technician but this has not been entered on the records. Using **Update**, select the date that the employee became a Production Technician and click **Apply** to display the panel for that date. Make the necessary changes. When you return to the current panel the Production Manager job title will still be shown because that is the most recent information.

You are informed that an employee was promoted from Sales Clerk to Sales Supervisor last week. Using **Update** mode you enter the effective date of change and make the necessary changes. When you return to the current view, the new position will be showing because it is the most recent change.

3.14.4 When to use Edit

Only use **Edit** if you are correcting information without keeping a record of the change in the history.

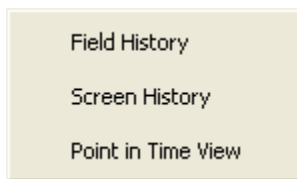
Clicking on the **Edit** button puts the form in 'edit mode' and is used to correct the currently displayed information. The effective date is the date on which the change was originally entered. This new information will overwrite the existing details and there will be no record of what was entered previously.

For example:

An employee is recorded as being a Purchase Ledger Clerk since 01/04/2004 when it really should be Purchase Ledger Assistant . Use **Edit** to correct the mistake. The effective date of change will still be 01/04/2004.

3.15 Viewing historical information

You can view historical changes to non-grid fields in **TMS**. Right-click on the field to display the following menu:



3.15.1 Field history

If you select **Field history**, a form similar to the following will appear:

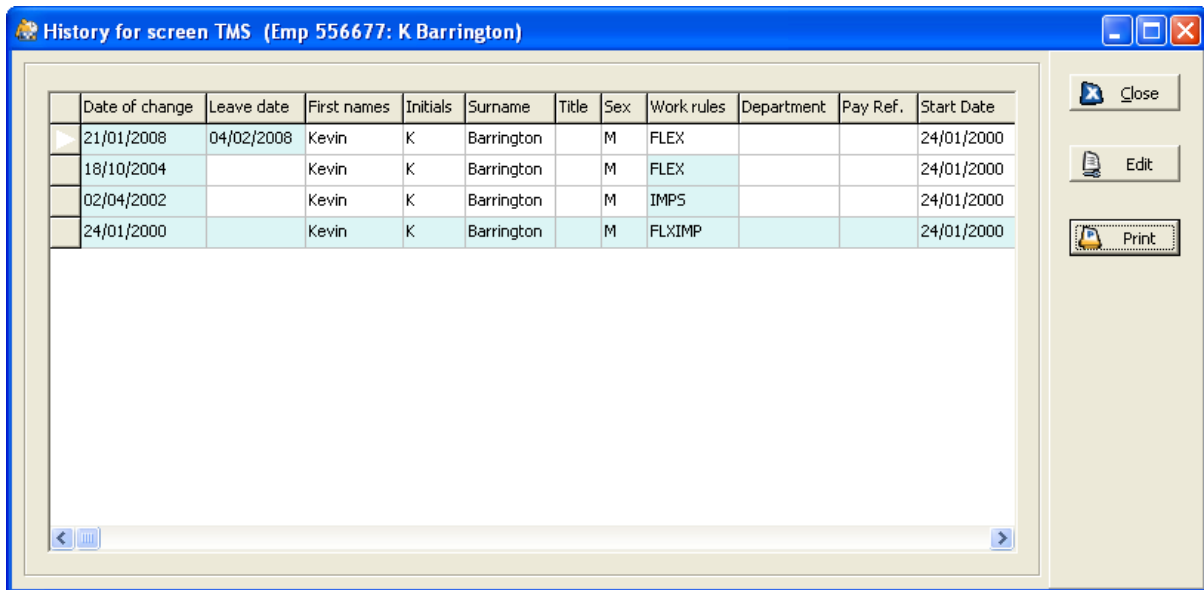
| Date of change | Department | Leave date |
|----------------|------------|------------|
| 11/12/2006 | 1 | |
| 26/10/2006 | 2 | |
| 09/09/2006 | 1 | |
| ▶ 12/01/2006 | 2 | |

This form will display the date and the value of any changes that have been made to the current field (including future changes). This example shows that there have been three changes made to the employee's department, since a department was first entered. If a future change has been entered, this will also be shown here.

Double-click on one of the changes to open a **Point in time view** for the panel on that date (see page 41 for details).

3.15.2 Screen history

If you select **Screen history**, a form similar to the following will be displayed:



| Date of change | Leave date | First names | Initials | Surname | Title | Sex | Work rules | Department | Pay Ref. | Start Date |
|----------------|------------|-------------|----------|------------|-------|-----|------------|------------|----------|------------|
| 21/01/2008 | 04/02/2008 | Kevin | K | Barrington | | M | FLEX | | | 24/01/2000 |
| 18/10/2004 | | Kevin | K | Barrington | | M | FLEX | | | 24/01/2000 |
| 02/04/2002 | | Kevin | K | Barrington | | M | IMPS | | | 24/01/2000 |
| 24/01/2000 | | Kevin | K | Barrington | | M | FLXIMP | | | 24/01/2000 |

This form shows all alterations to fields on the panel, showing the **Date of change** and containing as the first column the field that was clicked on. The form only shows changes for fields which retain historical details.

All alterations are highlighted with a pale blue background.

The **Print** button allows you to print a copy of all fields in the panel.

3.15.3 Point in time view

Select **Point in time view** to see information as it was, or will be, on any date. A form appears allowing you to enter the required date. You will then see the panel with details as they were on the specified date.

The screenshot shows a web-based form titled "View details for TMS" for employee Sarah Stephenson. The form is organized into several sections:

- Header:** Ref: 100002, 100002: Sarah Stephenson, Effective date: 14/08/2007
- Personal details:**
 - First names: Sarah
 - Initials: S
 - Surname: Stephenson
 - Title: Mrs
 - Sex: F (Female)
 - Work rules: SHOP (Weekly Shop Staff)
 - Department: 1 (Accounts)
 - Pay Ref.: (empty)
- Working time regulations:**
 - EWTD year start: (empty)
 - EWTD entitlement: 0 days
- Options:**
 - Include in payroll
 - Apply WTD
 - Night worker
- Roster:**
 - <none>
 - Base week: 1
- Access group:**
 - <none>
- Contract:**
 - Start Date: 06/01/2006
 - Process from: 06/01/2006
 - Leave date: (empty)
- Site code:** (empty)
- Profile:** EMPFULL (Full Employee Rights)
- Line Manager:** NA (Not Applicable)

Buttons for "Change" and "Personalise" are available for Roster, Access group, and Contract. A "Print" button is also present. The form is read-only.

This panel is read-only, so cannot be altered.

3.15.4 Editing historical information

If a row of historical or future information in the **Screen history** view is inaccurate, it can be amended.

This can be done in two ways, depending on whether you want any current code rules to apply. If you are editing past history it is possible that the complex code structure (how different fields of information relate to one another) has been changed since the history line was created and that rules which applied then do not apply now.

If the code rules may have changed, you must edit the information within the **Screen history** form (see Method 1 below).

If the current code set-up is still likely to apply you may find it easier to edit the panel using the second method (see Method 2 below).

Method 1: Editing history where existing code rules do not apply

In **Screen history** click the **Edit** button and change any incorrect information within the table. You can also use the buttons on the right to **Delete** a row of changes, or to **Add** a new row, with any changes to apply from the date that you select. Existing code rules do not apply here.

Method 2: Editing history where existing code rules still apply

In **Screen history** click **Edit**. Select the history line that you wish to change and click the **Modify** button. You will now see the panel with details as of that date, which can be changed in the required way. Existing code rules will still be applied.

3.16 Change password

It is important to keep your password secret, particularly if you are a system administrator or have a high level of access to the menu options and employees in the system. If your password becomes known by others, attempts could be made to access the system with your username.

If the password expiry function is used by your system, you will need to change your password at regular intervals. The system will warn you when the password expiry limit is approaching. It is advisable to change your password when you receive a warning. Alternatively, you may delay changing the password until later, when you should use the **Change password** function.

Select **Change password** from the **Other** menu:

Enter the old password, then enter the new password and repeat it for confirmation. The new password must be between four and ten alphanumeric characters in length. For security, both the old and new passwords will be hidden while they are entered.

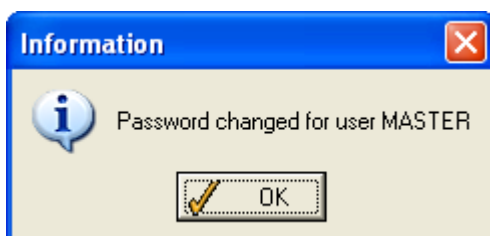
NB: For security reasons, the new password cannot be a repeat of the current password, or of the last six passwords used.

To ensure the new password is valid, the system checks that:

- a new password has been entered (blank passwords are not allowed);
- it is between four and ten characters in length;
- it is not the same as the original password;
- it is not a repeat of any of the last six passwords used.

Should the new password not meet all the criteria, an error message will be displayed, meaning you must enter another password.

Once a new password has been entered that does satisfy the checks mentioned above, a confirmation will be displayed:



You must now use the new password the next time you access any of your Mitrefinch applications.

3.17 System structure

The basic data flow structure for TMS is as follows:



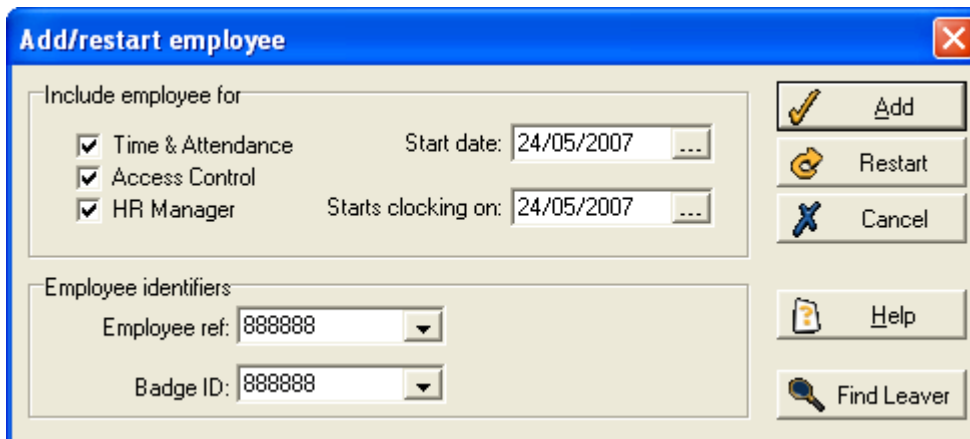
- When employees swipe their badge at the **Clocking terminal** (1), a clocking is generated and stored in the terminal.
- These clockings are extracted by the **Polling program** (2) and added to the **Clockings** (3) associated with the employee, or the **Error log** (3) if, for example, the badge number associated with the clocking is not recognised by TMS.
- At pre-defined times of the day the **Daily processing** task (7) processes these clockings according to the defined **Work rules** (6).
- The result of the **Daily processing** (7) is a **Daily work record** (8) for the employee, for each day being processed. These work records are amended if necessary, and then used as the basis for the transfer of hours to a **Payroll** system (9), and for all **Management reports** (10).

4 Employee maintenance

4.1 Add/restart an employee

4.1.1 Add an employee

Select **Add/Restart** from the **Employee** menu. The following form should be displayed:



Use the tick-boxes to determine the type of employee: choose between Time & Attendance, Access Control and HR Manager (select more than one box if applicable). This affects which Mitrefinch programs the employee will be included in.

Use the calendar button to select the date the new employee **Starts clocking on**. This is the first date that the employee is to be included in the TMS processing (i.e. when the employee first clocks in and out), and can differ from the **Start date** of the contract, which usually represents the actual day the employee started work.

It is recommended that:

- the **Starts clocking on** date entered is in the future;
- employees are added to the system close to the time they are expected to start clocking (rather than every employee being entered on to the system when the database is first being created).

Now enter the new employee's Employee ref and Badge ID. Both of these numbers must be unique to the employee. (For details on entering a badge number, see **Badge number**, page 85, and for details on employee reference numbers, see **Change employee**, page 55.)

4.1.2 Restart an employee

If an employee leaves the organisation and then returns you should call up the previous record through the re-starter option and make the necessary changes rather than enter him or her as a new starter. (This can only be done if the employee's details were not deleted when he or she left - see **Employee leaving**, page 57, for details.)

For example, a company may employ seasonal staff who only work during the summer; it would waste time adding all their details into the system every time they came back to the company.

NOTE:

- Do **not** enter the employee as a new starter or you will have two records.

- Do **not** use **Change start date** - this is only used for correcting a mistake.
- It is important to re-start an employee through the **Restart** option rather than simply finding his or her record and modifying it.

If you are restarting an employee, select **Add/restart** from the **Employee** menu, then click the **Find leaver** button, to display a form like this:

This form enables you to perform a quick search of the system for the employee's details.

Note: click the **Configure** button to select extra search criteria for the **Find employee** form. For more details see **Select an employee** on page 22.

Click on **Find** for a list of all previous employees. Alternatively, enter any information that you know about the employee (e.g. surname, date of birth) and then click **Find**. Do not type in all the fields because there is less chance of finding a match with more information.

The system will then match the details you have entered to previous records. This screen will then be displayed:

| Personnel ref | Surname | Initials | Known by | Date of birth | NI number | Health Scheme |
|---------------|------------|----------|----------|---------------|-----------|---------------|
| 360026 | Richardson | L | | | | |

The system has searched all the files of previous employees and found a match with this leaver. If the employee's details are not found the message 'No matches found' will be displayed instead.

If the correct employee has been found, click **OK** (if not, try a **New search**). The **Add Time & Attendance employee** form will now be displayed. Certain personal details will be retained from the employee's previous spell of employment, but others will have been cleared so it will not be assumed they are the same.

To find out the previous entry for a field, right-click on the box, and you can see a point in time view, or a history of the data.

Now click the **Restart** button and the **Add Time & Attendance employee** form will appear. Complete all the panels as required, and click **OK**, in the same way as for adding a new employee.

If you wish to change the original reference number you can do so (once the details have been updated and the **OK** button has been clicked) by using the **Change number** option - see **Change employee number**, page 55.

4.2 Planned shift changes

To view all the planned changes to the employee's shift pattern, select **Planned shift changes** from the **Employee** menu. The changes will appear in a list like this:

| | Date | Shift | Description |
|--|------------|-----------|------------------|
| | 09/04/2007 | COMPTEST1 | Complex Day |
| | 10/04/2007 | COMPTEST1 | Complex Day |
| | 11/04/2007 | COMPTEST1 | Complex Day |
| | 12/04/2007 | COMPTEST1 | Complex Day |
| | 13/04/2007 | COMPTEST1 | Complex Day |
| | 14/04/2007 | WEOT | Weekend overtime |
| | 15/04/2007 | WEOT | Weekend overtime |

To add a planned shift change, click on the arrow to the left of the table:



Then select **Insert entry** and click **OK**. Select the date using the calendar button and the new **Shift** for that date from the drop-down list. The **Description** will be entered automatically by the system in response to the shift entered. Click **OK** and the planned shift change will be saved to the system.

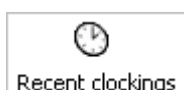
To remove a shift change, select the required change and click the arrow to the left. Then select 'Delete entry' and click **OK**. The shift change will be removed from the table. Click **OK** to save the alterations. The employee will now be scheduled to work his or her usual shift on that day.

You may find it more convenient to enter a planned shift change for an employee on the **Future Work Planner** (see page 154).

Alternatively, you can set up a planned shift change for an entire department, or any group of employees, by using the **Planned shift change for range** function (see page 80).

4.3 Recent clockings

To view, by default, a list of all unused (unprocessed) clockings entered by the employee, select the icon:



This page shows all clockings, including any that have not yet been entered onto the clock card. Choose whether to view 'Unused', 'Current' or 'All'. You can also include 'On-site' or 'Access' clockings.

Tick the **Extended view** box to show more details about the clockings:

| Type | Day | Date | Time | Dir | Usd | Orig | Trm | Location | Parameters |
|-------|-----|-----------|-------|-----|-----|------|-----|----------|---------------------------|
| ▶ CLK | Tue | 14-Aug-07 | 09:00 | In | N | N | 0 | | |
| TAS | Tue | 14-Aug-07 | 10:00 | TAS | N | N | 0 | | Test:1 - Accounts:test:NA |
| CLK | Tue | 14-Aug-07 | 12:00 | Out | N | N | 0 | | |
| CLK | Tue | 14-Aug-07 | 12:30 | In | N | N | 0 | | |
| TAS | Tue | 14-Aug-07 | 13:00 | TAS | N | N | 0 | | Test:2 - Admin:test:NA |
| CLK | Tue | 14-Aug-07 | 17:30 | Out | N | N | 0 | | |

The additional information that will be displayed includes:

- **Usd** - this informs you if the clocking has been used, or processed - in general, only clockings made on the current day will not have been processed.
- **Orig** - if the clocking is original, i.e., it was made at a clocking terminal, 'Y' will be displayed; if the clocking was manually added or has been edited afterwards, 'N' will display.
- **Trm** - refers to the terminal at which the clocking was made (if the clocking was manually added, '0' will be displayed).
- **Location** - this shows where the clocking was made.
- Any other columns (in this example, **Parameters**) apply only to systems using TAS clockings. They may have different names and uses on your system, as they will have been set up specifically by your system administrator.

You can use the **Locate** button to find out where an employee has clocked. This function works in tandem with Microsoft MapPoint.

The **Set access** button allows you to set any clocking as the latest on the onsite/absent list. This is helpful if an employee has not used an access control terminal to clock in and so is not listed as being onsite. For more details see **Onsite/absent list** on page 65.

To add, edit or remove a clocking, see the **Clockings** section of **Edit on the Outstanding Anomalies form** (page 112).

4.4 Employee details

To see all the personal and work-related details of your employee that are stored in TMS, select the following icon:



Employee details

4.4.1 TMS details

The first panel records TMS details:

Maintain employee details 100002: S Stephenson

Change/Add badge | Badge ref. 100002 | Version | Change PIN | Maintain users | Print badge | Capture image | Change Timezone

Ref: 100002 | 100002: Sarah Stephenson | Status: AP | Read only

Personal details

First names: Sarah
 Initials: S
 Surname: Stephenson
 Title: Mrs
 Sex: F Female
 Work rules: SHDP Weekly Shop Staff
 Department: 1
 Pay Ref.:

Working time regulations

EWTD year start: ...
 EWTD entitlement: 0 days

Options

Include in payroll Apply WTD
 Night worker

Approver: ...
 Flex base date: 12/01/2006

Roster

<none> Change
 <none> Personalise
 Base week: 1

Access group

<none> Change
 <none> Personalise

Contract

Start Date: 06/01/2006
 Process from: 06/01/2006
 Leave date: ...

Site code

Profile: EMPFULL Full Employee Rights

Line Manager: NA Not Applicable

Buttons: Close, Update, Edit, Print, Docs, Help

TMS | Entitlements | Contact points | Job

(NB: If you are entering new details, or amending incorrect details (e.g., the name was spelt incorrectly), click **Edit**, then complete the relevant information. However, if you are making an amendment to details which were previously correct but have now changed (e.g., the employee has moved to a different department), click the **Update** button. You are prompted to enter a 'date of change', i.e., the date from which the change is to take effect (this can be past, present or future), before you can enter the up-to-date information. This method retains a record of the old data.)

The following details can be entered on the TMS panel:

Personal details

Among these are included the employee's **Work rules**, or profiles - a generalised set of rules (e.g., rates of pay, hours of work, lateness allowances, clock time rounding) that will be assigned to the

employee. The work rules cover major differences in working practices, for example between managers, office staff and shop-floor employees. They are also used to group employees for payment purposes. The drop-down list will display the work rules that are available for the employee.

You should select the employee's **Department** from the drop-down list, and also enter the number to be used as the employee's **Pay ref**, which can be the same as the employee badge number if required (the number is used for reference to an external system, e.g., a payroll system).

Contract

Select the **Start date**, and the **Leave date** if known, from the calendar.

Working time regulations

If the employee is to be included in the EWTD (see **EWTD Features**, page 272, for details), select the date that any working time calculations (e.g., reports) should use as a start-date.

You should also enter the **EWTD entitlement**, to meet the working time regulations, which state that employees are entitled to a minimum of 15 days' holiday in a year (this may differ according to circumstances). You need only enter the minimum holiday entitlement for an employee (i.e., 15 days) in the box. The EWTD entitlement values will not normally need to be modified and are really only reference values for use in reports.

See also the **Options**, explained below.

Roster

Choose from the drop-down list the roster that the employee is to work. A roster is an employee's working pattern, and consists of a sequence of shifts, each of which sets the work rules for any one period of attendance at work. If you set the employee to a roster with multiple weeks, you will see a form like this:

Allocate employee to rotation

4 week roster: DAYS/NIGHT Days Nights

Base week: 1

Show roster from: 20/03/2006

OK

Cancel

| Date | Shift | Time display |
|----------------|------------|--------------|
| 20/03/2006 Mon | 0800-1630 | [Yellow bar] |
| 21/03/2006 Tue | 0800-1630 | [Yellow bar] |
| 22/03/2006 Wed | 0800-1630 | [Yellow bar] |
| 23/03/2006 Thu | 0800-1630 | [Yellow bar] |
| 24/03/2006 Fri | 0800-1530F | [Yellow bar] |
| 25/03/2006 Sat | NWDSAT | [Grey bar] |
| 26/03/2006 Sun | NWDSUN | [Grey bar] |
| 27/03/2006 Mon | 2000-0700 | [Yellow bar] |
| 28/03/2006 Tue | 2000-0700 | [Yellow bar] |
| 29/03/2006 Wed | 2000-0700 | [Yellow bar] |
| 30/03/2006 Thu | 2000-0700 | [Yellow bar] |
| 31/03/2006 Fri | 1900-0600F | [Yellow bar] |
| 01/04/2006 Sat | | [Yellow bar] |
| 02/04/2006 Sun | NWDSUN | [Grey bar] |
| 03/04/2006 Mon | 2000-0700 | [Yellow bar] |

This shows the pattern of each week in the roster. Choose the **Base week** so that the employee starts the roster at the correct point.

Access group

Access groups are used to restrict employees to a specific group of clocking terminals (i.e. allowing them to clock at certain terminals only), and can determine which employees are permitted to open certain doors. Choose from the options in the drop-down list.

Site code

If applicable, you can specify which site the employee works at, controlling which information is accessible to the employee.

Options

'Include in payroll' - tick if the employee is to be included in payroll processing (e.g. payroll reports).

'Night worker' - when this is ticked, the employee will be defined as a night worker for the purposes of the EWTD.

'Apply WTD' - tick if the employee is to be included in the EWTD.

If you need to change the employee's badge number (see **Change badge**, page 85 for details) or PIN, click the icons at the top of the form:



Then enter the new number when prompted.

Switch to different sections of the form using the tabs at the bottom of the form.

It is possible to store documents for the employee against the **Employee details** form. Click the **Documents** button to access and add documents for the employee. For more details see **Documents** on page33

4.4.2 Entitlements

Click the **Entitlements** tab to display the following panel:

The screenshot shows a software window titled "Maintain employee details 100002: S Stephenson". The window has a toolbar with icons for "Change/Add badge", "Change PIN", "Maintain users", "Print badge", "Capture image", and "Change Timezone". Below the toolbar, there are fields for "Ref: 100002", "100002: S Stephenson", "Status: A", and "Read only". The main area contains a table with the following data:

| Entitlement | This year | Next year | Carry over | Credit | Recorded in | Start Date | End Date |
|-------------|-----------|-----------|------------|--------|-------------|------------|------------|
| Holiday | 23.00 | 24.00 | 0.00 | 0.00 | Days | 01/01/2008 | 01/01/2009 |
| Sickness | 7.00 | 7.00 | 0.00 | 0.00 | Days | 01/01/2008 | 01/01/2009 |

On the right side of the table, there are buttons for "Close", "Edit", "Print", "Docg", and "Help". At the bottom left of the window, there are tabs for "TMS" and "Entitlements".

To add any holidays or other entitlements, such as training or sickness, select the required category from the table, and click **Edit** and then click the **Modify** button which subsequently appears. A form similar to the following will then be displayed:

Enter into the boxes the entitlements for **This year** and **Next year**. If the employee is starting part-way through a holiday year, this year's figure may need to be adapted accordingly.

Details of any entitlement that the employee has **Carried over** from the previous year, or has in **Credit**, can also be entered in the relevant boxes. Ensure that you have selected from the drop-down list whether the entitlement is to be registered in days or hours.

Click **OK** and the information you have entered will be displayed in the table. Do this for all types of entitlements applicable to the employee.

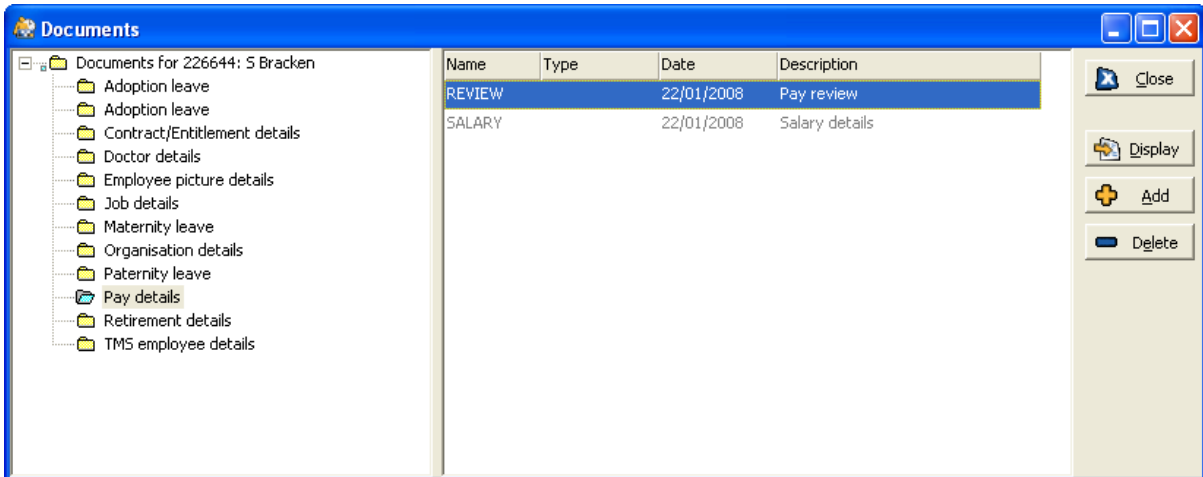
You can use the **Days/Hours** drop down list to specify whether the employee's entitlements will be calculated and displayed within the system as days or hours, and then specify the **Start date** and **End date** for the entitlement. For more details see Chapter 9 **Entitlements** on page 106.

N.B. To set which Entitlement is first displayed when the page is first loaded, go to the **'Web 2'** tab in **'System Preferences'** and select a default from the **'Entitlements'** pane.

When you have completed all amendments to the employee's details, click **Apply** to save the changes, or click **Undo** to discard them.

4.5 Files

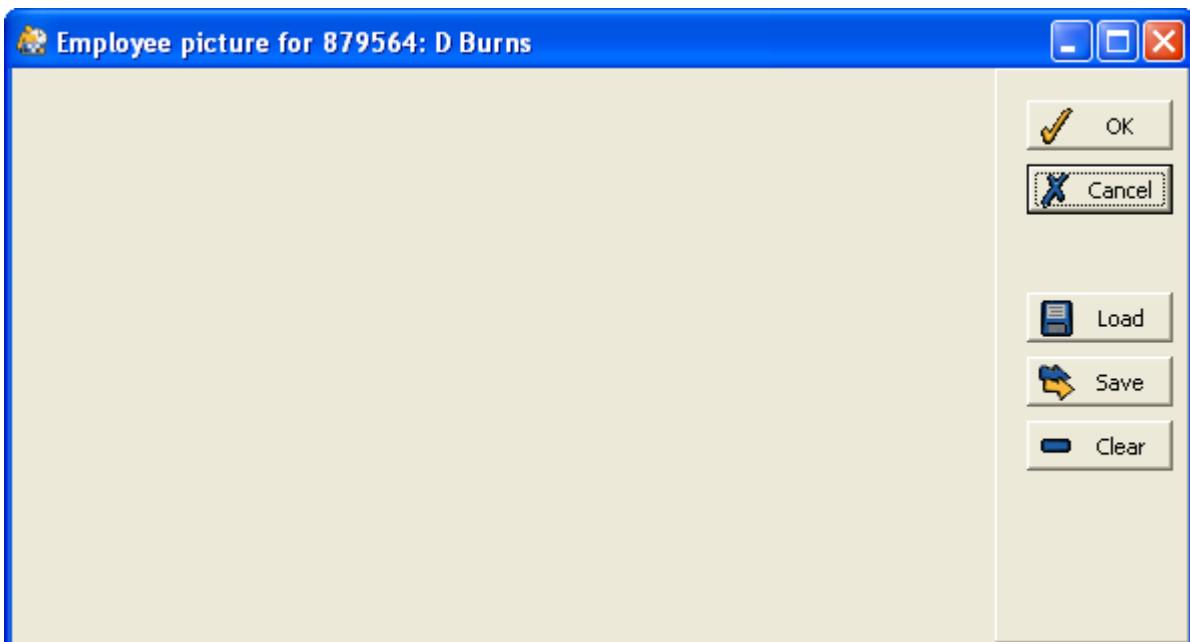
Select **Files** from the **Employee** menu to see a table of all documents and other files stored that relate to the employee:



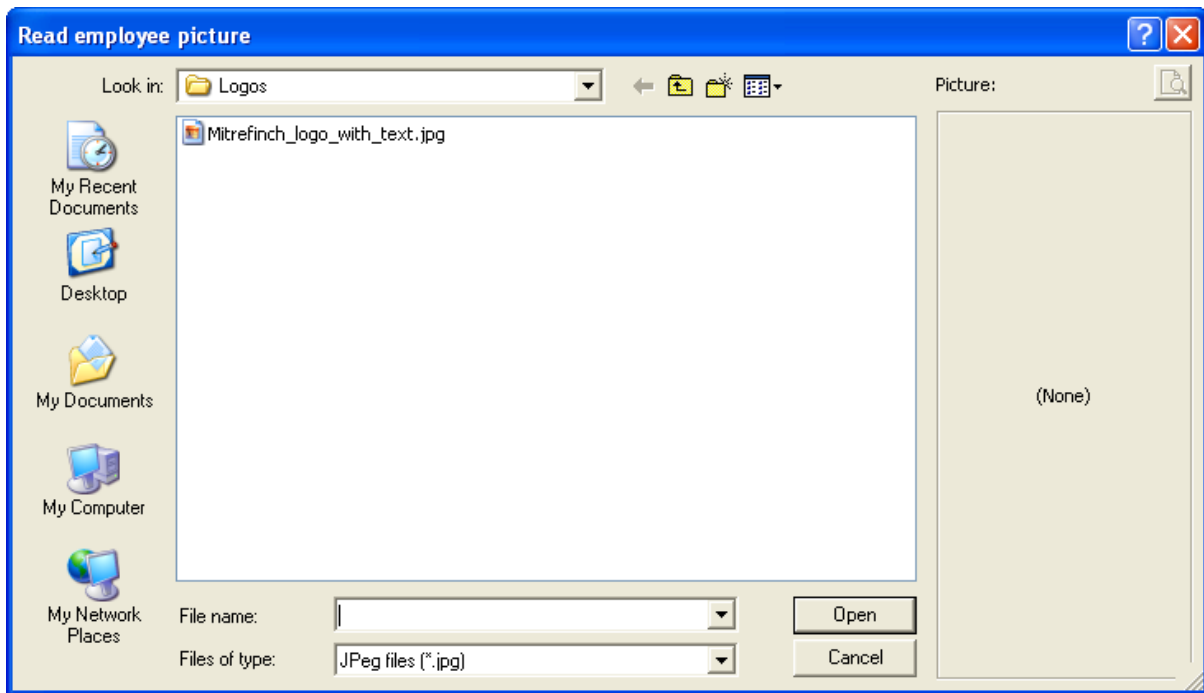
This form stores documents for the employee within **TMS**. You can also access this form via the **Docs** button on the **Employee details** form. For more details see **Documents** on page 33

4.6 Employee picture

Select, the relevant employee, select the **Employee** menu and then select **Picture**. The following form will then be displayed:



You can store and view the employee's picture on this form. To load an image, click the **Load** button. A form similar to the following will then be displayed:



Use the window to locate an appropriate image and then click **Open**. Please note that only bitmap and jpeg images can be loaded.

The chosen image will then appear on the **Employee picture** form as follows:



To save the image back onto your PC, click the **Save** button and follow a similar procedure as outlined above.

To remove the image from the **Employee picture** form click the **Clear** button.

4.7 Change employee number

It is very rare that you should need to change an employee's reference number, as this is the unique number used to refer to the employee on the system. However, should you wish to do so, select **Change number** from the **Employee** menu. You will be prompted before you continue, to confirm that it is the reference number and not the badge number that needs to be changed:

Enter the new number you wish to assign to this employee in the empty box. Click **OK**, and the new number will be applied to the employee immediately. Historical information will also be changed, and no record of the old number will be kept.

4.8 Change employee type

To choose which Mitrefinch systems (e.g., Time & Attendance, HR Manager, Access Control) the employee should be included in, select **Change employee type** from the **Employee** menu.

Tick as many boxes as are appropriate for the employee (depending on which applications are on your licence), and then click **OK**.

4.9 Edit employee's flex balance

If the selected employee works on flextime, you can manually edit his or her balance. Normally the flex balance does not need editing because it is constantly updated by the changing details in the work record. However, should you need to edit the balance, select **Flex balance** from the **Employee** menu:

Click the **Edit** button, and enter the new value of the flex balance. This is usually done for the current date, but to change the flex balance as of a date in the past, use the calendar in the **Up to** box.

If the change you make has a base date (in the **Up to** box) in the past, but after the start of the previous period, the flex balance may be affected by any changes made to the employee's work record. For this reason, it is recommended that you do not edit the flex balance on this form until you have finished making changes to the work record.

4.10 Employee leaving

When an employee leaves your company, it is necessary to prevent the system from including this person on reports and in any day-to-day processing. This can be achieved in two ways.

The first method involves identifying the employee as a leaver, allowing historical information (e.g. start date, clockings, shift pattern) to be retained and accessed when required. This is also useful if the person rejoins the company at a later date, as he or she can simply be 'restarted', allowing the transfer of historical information into the active system.

The second involves the permanent removal of the employee from the system, along with all historical information accumulated while the employee has been at the company. Once removed, this historical data cannot be accessed within the system. Care should therefore be taken when using this option.

4.10.1 Identify the employee as a leaver

This removes employees from any day-to-day reports and processing in the system, while still allowing enquiries on their historical details.

First, open the **Employee details** form by clicking the icon:



Employee details

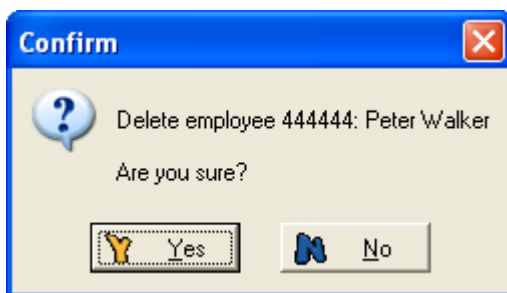
Enter the date the employee left, or is to leave, in the Leave date box.

If a past date is entered, the employee will become inactive immediately. If a date in the future is entered, the employee will remain active and be processed up to and including that date, before becoming inactive on that future date.

If the change has made the employee inactive, you will be prompted as to whether the employee should be set as a leaver. If your **Selection options** are set to exclude leavers from the display, the records of an employee marked as a leaver will become inaccessible. To see them again, you must change the selection options.

4.10.2 Delete employee

To remove an employee from the system permanently, first ensure the required employee is selected, and is shown in the **Employee** drop-down list. Then select **Delete** from the **Employee** menu. This pop-up box will appear asking you to confirm the action:

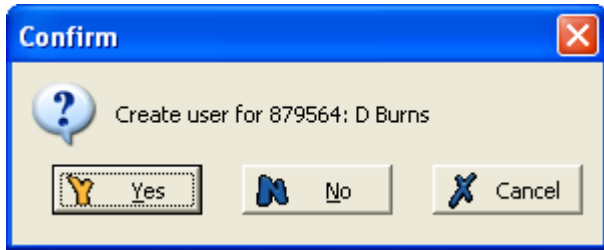


Click **Yes** to delete the employee, and remove all associated information.

4.11 Edit user from Employee menu

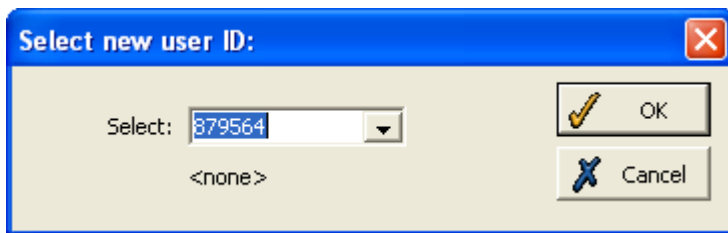
This function allows you to create or edit a user profile for an employee stored in **TMS**. For an definition and explanation of user profiles see page 273 Select the **Employee** menu and then select **Edit user**.

If the employee doesn't have a user profile already, the following message will then be displayed:



Click **Yes** to continue the process.

The following form will then be displayed. If the employee in question is already a user within **TMS**, this form will be displayed when you first choose to **Edit user**:



Define a new user ID for the employee and then click **OK**. The following form will then be displayed:

 A form titled "Edit user" with a close button (red X) in the top right corner. The form contains several input fields and buttons:

- Username: 879564
- Full name: 879564: D Burns
- Windows user: (empty field)
- Buttons: "View access" and "Set Password"
- Profile: (dropdown menu showing "<none>")
- Checkboxes:
 - Read only
 - Use password expiry
 - View all events
- Access buttons: "Employee access", "Diary access", "Auto ID access", and "Vacancy access"
- Control buttons: "OK" (with a yellow checkmark icon), "Cancel" (with a blue 'X' icon), and "Help" (with a question mark icon)

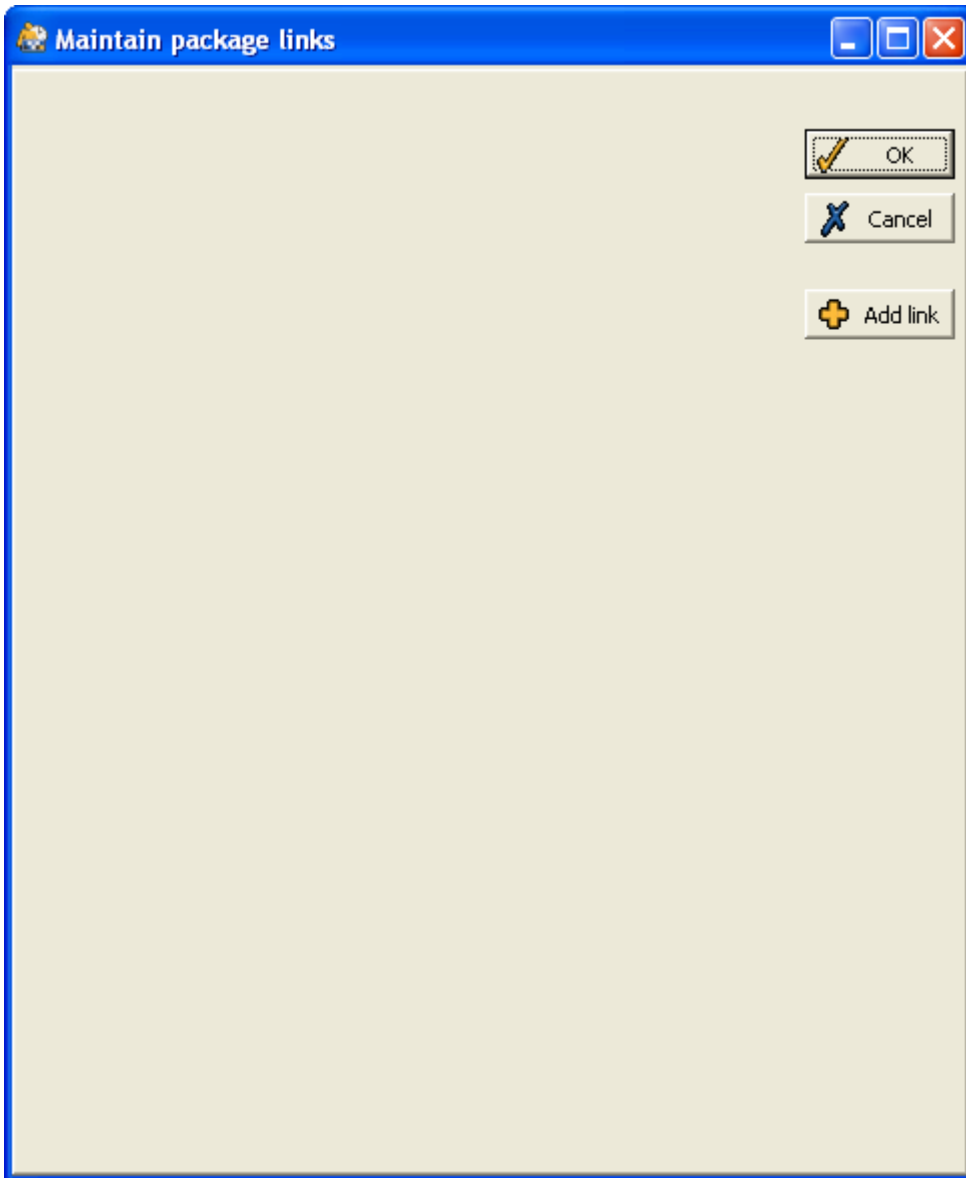
For details of how to fill in this form and add the employee as a user, see Chapter twenty-six **Security** on page 273.

4.12 Maintain package links

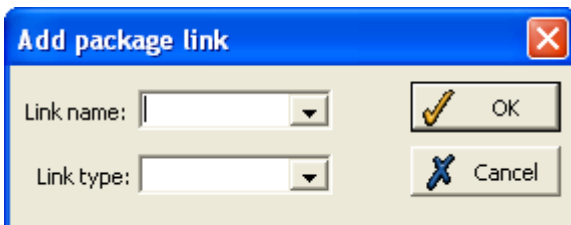
If you have purchased Mitrefinch's HR program, **HR Manager**, or payroll program, **Flexipay**, you may well be linking employee details from WinTMS into Flexipay or HR Manager. To view how the three packages are linked, select the **System** menu from the main TMS toolbar and select **Package links**. Alternatively, click the following icon:



The following screen should be displayed:



Click the **Add link** button to display the following form:

A screenshot of a smaller dialog box titled "Add package link". It has a blue title bar with a close button. The main area is light beige and contains two input fields: "Link name:" followed by a text box and a dropdown arrow, and "Link type:" followed by a text box and a dropdown arrow. To the right of these fields are two buttons: "OK" with a pencil icon and "Cancel" with a blue 'X' icon.

Add a **Link name** in the top field; from the **Link type** drop-down list, choose whether you want to establish a link with **Flexipay** or **HR Manager**. Click **OK** and then the following form will be displayed:

Maintain package links

NEW

Link details

Description: Active

Data directory: ...

Link type: Flexipay

Dept. lookup: DEPARTMENT

From

Table: Main employee details

Fields:

- ADDR1
- ADDR2
- ADDR3
- ADDR4
- ALTADDR1

To

Table:

Fields:

| | HR Manager field | Flexipay field | Uppercase |
|--------------------------|------------------|----------------|--------------------------|
| <input type="checkbox"/> | | | <input type="checkbox"/> |

OK
Cancel
Add link
Delete
Rename
Copy

This screen shows exactly how WinTMS is linked to Mitrefinch Flexipay Payroll (or Mitrefinch HR Manager). The link can be activated or de-activated using the appropriate tick box. You can define which WinTMS fields are linked to fields in Flexipay, using the **From** and **To** parts of the form.

5 Group maintenance

5.1 Authorise requests

To check requests made by members of the selected group, go to **Authorisation list** on the **Group** menu, or click the following icon on the Group toolbar:



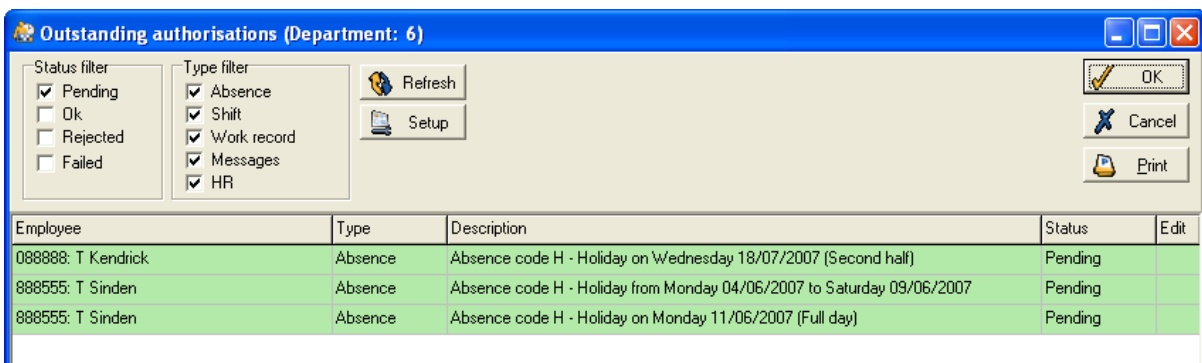
To restrict the list to certain requests, select only the boxes required for the **Status filter** and **Type filter**, or tick all boxes to view all requests.

There are four options in the **Status filter**:

- 'Pending' - requests that are waiting to be accepted/rejected;
- 'OK' - requests that have been accepted;
- 'Rejected' - requests that have been refused;
- 'Failed' - this indicates a system error, e.g. if an employee request for holiday is in the past (because the supervisor has not authorised the request in time), TMS will set the status to 'Failed' when the supervisor tries to accept this request.

The **Type filter** has five options:

- 'Absence' - requests for planned absence;
- 'Shift' - requests for a change of shift;
- 'Work record' - employees' own amendments to their work records, e.g., to clocking times, worked hours or absence hours;
- 'Messages' - these are simply written messages employees can send to you;
- 'HR' - this is a request made by the employee to change his or her details, as recorded on HR Manager.

A screenshot of a software window titled 'Outstanding authorisations (Department: 6)'. The window has a blue title bar and standard window controls. It features two filter sections: 'Status filter' with checkboxes for 'Pending' (checked), 'Ok', 'Rejected', and 'Failed'; and 'Type filter' with checkboxes for 'Absence' (checked), 'Shift' (checked), 'Work record' (checked), 'Messages' (checked), and 'HR' (checked). There are 'Refresh' and 'Setup' buttons between the filters, and 'OK', 'Cancel', and 'Print' buttons on the right. Below the filters is a table with columns for Employee, Type, Description, Status, and Edit. The table contains three rows of data, all with a 'Pending' status.

| Employee | Type | Description | Status | Edit |
|--------------------|---------|--|---------|------|
| 088888: T Kendrick | Absence | Absence code H - Holiday on Wednesday 18/07/2007 (Second half) | Pending | |
| 888555: T Sinden | Absence | Absence code H - Holiday from Monday 04/06/2007 to Saturday 09/06/2007 | Pending | |
| 888555: T Sinden | Absence | Absence code H - Holiday on Monday 11/06/2007 (Full day) | Pending | |

Different statuses of request will appear in the table in different colours - to alter their appearance, click the **Setup** button and change the text colour and background colour of each status.

Deal with a request by changing its status in one of two ways. Click in the **Status** column of the appropriate request to display a drop-down list, from which you may select the new status. (**NB**: You cannot change the status of a 'Failed' request, as it is set automatically.)

To view more details of a request, click the button that appears in the **Edit** column when a request is selected:



You will see something like the form below:

Authorise the request by changing the **Status** from the drop-down list. If you wish, you can enter a comment in the **Supervisor reason** box.

Click **OK** to return to the table, where the request will display its new status.

To save any changes you have made to requests, click **OK**, or to discard the changes, click **Cancel**.

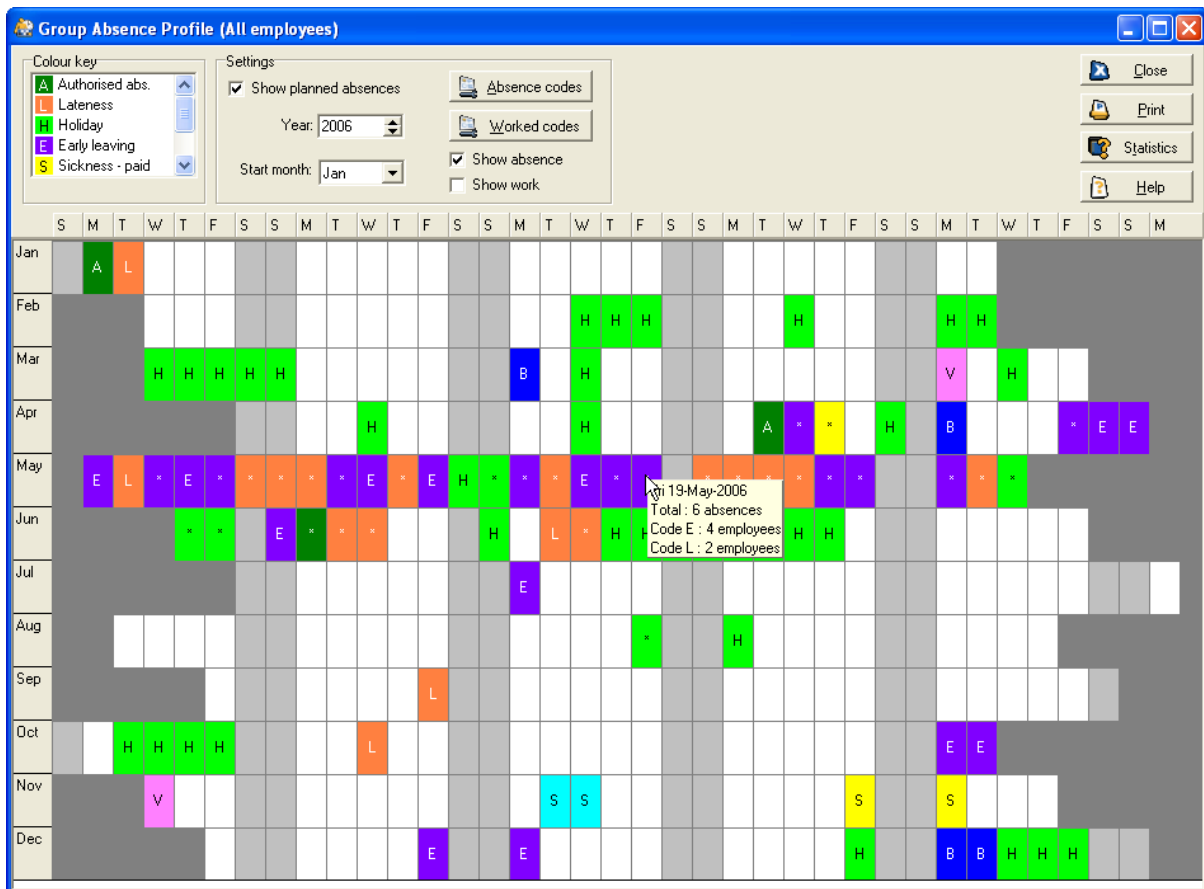
Note: any unchecked employee requests which have been escalated will be displayed in the **Authorisation list**. For a further explanation see **Escalation** on page 312.

5.2 Group absence profile

To see all the absences, past and future, of a department over the course of a year, select this icon:



A form will appear allowing you to define what employees or departments you wish to view in the group absence profile. For instructions on how to use this form see **Select range** on page 28.



Should you wish to view a past or future period, select the year using the arrows, and the start-month from the drop-down list.

Make sure the **Show planned absences** box is ticked if you wish the table to display absence periods planned for the future, as well as those already taken. You can also specify whether you want to view work or absence details (or both) through the **Show absence** and **Show work** tick boxes.

The **Absence codes** and **Worked codes** buttons allow you to select which hours codes to view on the group absence profile. For details of how to use these buttons see **Select available items** on page 31.

The different types of absence are marked by their absence codes, and appear in different colours, identified by the key above the table. If an asterisk appears in place of an absence codes this means that there are more than one types of absence recorded for that day. When the cursor is moved over one of the absence days, a pop-up box appears displaying the details of the absence. Days with more than one absence will show details of each in the pop-up box, as shown above. To see which employees were (or will be) absent on a particular day, right click the mouse, and select **View absence list** from the menu presented. This displays a list of all absentees, with details of their absences.

You can choose to include all absence types in the profile, or to exclude some categories. This is particularly useful if you wish to concentrate on a certain type of absence, e.g., holiday or sick leave, without the profile being cluttered by other absence types. To add or remove absence categories, click the **Setup** button and select the categories in the manner described in **Select available items**, page 31.

To find out which employees were absent, or any other information about a day in the past, double-click on the day within the table. This displays a **Group clock card** for that day, showing the details of all absentees in the department, as well as the employees who were present. This can be edited in the same way as individual employees' clock cards, as explained in the **Unchecked anomalies** section (see page 111). The group clock card can also be accessed through the **Group** menu.

To learn more about a day in the future, double click on the day to display a **Future Work Planner** for the week, which, if necessary, can be edited in the usual way (see page 154). The duration of the work planner will depend on the last accessed duration.

To add an absence for the entire group, e.g., a bank holiday or training day, right-click on the day and select **Apply general absence**. This produces the same form as that used to add a **Planned absence for range** (see page 131).

To show all absences for the selected day, right-click on the day and select **View Absence List**. A form similar to the following should be displayed:

| Ref | Name | Start Date | End Date | Code | Description | Part Day |
|--------|-------------|------------|------------|------|---------------|----------|
| 088888 | Kendrick, T | 17/04/2007 | 17/04/2007 | E | Early leaving | F |
| 888555 | Sinden, T | 17/04/2007 | 20/04/2007 | H | Holiday | |

Part Day
 F: First part of shift
 S: Second part of shift

Double-click on one of these absences to view and edit the planned absences for that employee.

Click on the **Statistics** button on the **Group absence profile** to display a form similar to the following:

| Code | Description | Periods | Sun | Mon | Tue | Wed | Thu | Fri | Sat | Total |
|---------|-----------------|---------|-----|------|------|------|------|------|-----|-------|
| A | Authorised abs. | 8 | 0.0 | 5.5 | 1.0 | 0.0 | 0.0 | 0.0 | 0.0 | 6.5 |
| L | Lateness | 76 | 1.5 | 5.0 | 12.0 | 13.0 | 3.5 | 11.5 | 0.5 | 47.0 |
| H | Holiday | 40 | 3.0 | 4.0 | 4.5 | 12.5 | 9.5 | 13.0 | 4.0 | 50.5 |
| E | Early leaving | 83 | 2.5 | 8.5 | 8.0 | 7.0 | 6.0 | 10.0 | 1.5 | 43.5 |
| S | Sickness - paid | 3 | 0.0 | 1.0 | 0.0 | 0.0 | 0.5 | 1.0 | 0.0 | 2.5 |
| SU | Sick - unpaid | 1 | 0.0 | 0.0 | 1.0 | 1.0 | 0.0 | 0.0 | 0.0 | 2.0 |
| TOTALS: | | 218 | 7.0 | 27.5 | 27.5 | 34.5 | 19.5 | 36.5 | 6.0 | 158.5 |

This form allows you to see totals of absence codes within the specified view of the group absence profile. In the above example, attendance statistics for 'all employees' are shown because the user has chosen to see **All** employees on the group absence profile. You can choose to display totals of **Days** or **Hours** by clicking on the appropriate radio buttons on the top of the form above. If you select **Hours** some further options appear:

Format

Hours and decimal (7.50)

Hours and minutes (07:30)

These extra radio buttons allow you to choose how you wish to view the hours on the **Attendance statistics** form.

5.3 Onsite/absent list

To view at a glance which members of a department, or of the entire company, are present, click the following icon:



The **Select range** (see page 28) form will appear, allowing you to select the employees to be included in the list.

Once you have selected which employees to include in the list, you will see a screen like this:

| Employee | Location | Clockings/Absence | Site | D/Site | In |
|-----------------------------|----------|-----------------------|------|-------------------------------------|-------------------------------------|
| 000001: Andrew Martins | | 09:00 12:00 12:30 | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| 000002: Sadie Herbert | | 08:00 12:00 | | <input type="checkbox"/> | <input type="checkbox"/> |
| 000003: Jane Collins | | | | <input type="checkbox"/> | <input type="checkbox"/> |
| 000004: David Watson | | 06:00 12:00 12:30 | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| 000005: Eddie Davies | | 14:00 | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| 000006: Felicity Sutherland | | 09:00 12:00 12:30 | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| 000007: Graham Stephenson | | | | <input type="checkbox"/> | <input type="checkbox"/> |
| 000008: Sarah Brown | | 10:00 12:00 14:00 | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| 000009: Gary Henderson | | 09:00 12:00 12:30 | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| 000011: Susan Carey | | 06:00 12:00 12:30 | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| 000012: Larry Thompson | | | | <input type="checkbox"/> | <input type="checkbox"/> |
| 000013: Mark Flavelle | | 10:00 12:00 14:00 | | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

You can change the selection of employees at any time, in the **Employees** section:

Click 'All' to view all employees in your system, or click 'Select', then the **Selection** box to return to the **Select range** screen, where you can make a new selection of employees.

In the **Sort** section of the form you can specify how the list will be ordered, either by groups or employees.

In the **Status options** table, select the status that you wish to view on the list. If 'All' is selected, then all employees within your selected range will be included on the list. Other options will narrow the search to those currently matching the selected status.

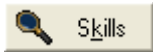
If you wish the employees' statuses to be updated automatically every few seconds, click the 'Auto' box in the **Refresh** section.

This means that, should an employee's status change, e.g., someone clocks in or out, the list will update to reflect the change. Alternatively, click 'Manual' and the list will only change when you click the **Refresh** button:



When 'No filter' is selected in the **Filter** section, the list contains all the employees meeting the status criterion.

If you wish to narrow the search, choose to filter 'By skills', and then click the **Skills** button,



to bring up a screen similar to this:

The dialog box titled "Employee skill search" has a blue title bar with a close button (X). It is divided into several sections:

- Available skills:** A table with two columns. The first column contains skill codes (F/AID, FORK) and the second column contains skill descriptions (First aid, Fork lift truck driver). Below the table are four arrow buttons for moving skills between lists.
- Selected skills:** An empty rectangular box for displaying chosen skills.
- Skill match:** A group box containing three radio buttons: All, Any, and None.
- Instructions:** A text box containing the text: "Select employees from the current group of employees matching all of the skills selected".
- Buttons:** On the right side, there are three buttons: "OK" (with a checkmark icon), "Cancel" (with an X icon), and "Help" (with a question mark icon).

This allows you to filter through all the employees who meet your status criterion (e.g., On site), to find those who are registered as possessing certain skills (on the above example, first aid practitioners or fork lift truck drivers).

Select the skills you wish to use as filters in the manner described in **Select available items** (see page 31).

Then you should select the **Skill match**: 'All' means that the search will only show those employees who match all of the skills you selected, 'Any' will show those who match any of the selected skills, whereas 'None' will show employees who do not match the skills you have selected.

Click **OK** to view the results of your search.

If no employees match the criteria, an error message will be displayed, and you must revise or cancel your skill search.

If a **Status option** other than 'All' has been selected, there may be other choices for creating a filter, which allow you to filter 'By terminal' or 'By site'. Clicking either of these boxes allows you to select a filter from a drop-down list. These filters allow you to make advanced searches, for example, to find every employee whose status is 'On site', and who works at a particular site.

Note: you can alter the appearance of the **Onsite/Absent list** for different users of TMS. For example, you might not wish for all your users to view what time employees clocked in. See **User Profiles** on page 273 for details.

5.4 Skills matrix



Click the icon to see a list of all the members of your selected department, showing all the skills that have been assigned to them in TMS (e.g., first aid practitioners or fork lift truck drivers).

| Employee skills matrix (Department: 6) | | | | | | | | | |
|--|--------------|-------------------------------------|-------------------------------------|-------|--|---|--|-------|--|
| Display skills | | Search skills | | Print | | <input checked="" type="checkbox"/> Hints | | Close | |
| Ref | Name | F/AID | FORK | | | | | | |
| 088888 | Kendrick, T | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | | | | | |
| 888222 | Footstool, S | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | | | | | |
| 888555 | Sinden, T | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | | | | | | |
| 888666 | Walker, B | <input checked="" type="checkbox"/> | <input type="checkbox"/> | | | | | | |
| Totals | | 4 | 1 | | | | | | |

You can update any skills that an employee has gained by ticking the relevant box. The total number of people in the department credited with each skill is shown underneath the table.

To change the skills selected in the matrix, click **Display skills**, and transfer any skills between the **Available** and the **Selected** boxes, using the arrows in the manner described in **Select available items** (see page 31).

Skill search

To make an in-depth assessment of the department's skills, click **Search skills**, to see a page like this:

Select the skills to search in the same way as described in **Select available items** (see page 31).

Select a **Skill match**, to choose between searching for employees who meet all of the criteria, and searching for those who meet any of the criteria.

If you wish to extend your search beyond the selected department, and include all employees in TMS, select to search **Entire database** rather than **Current group**.

Having selected whether to search a department or the entire TMS database, you can refine the search by selecting which employees to include:

- All;
- Currently on site;
- Available on... - select a date from the calendar below, to search only those employees who are available on that day;
- Expected on... - select a date from the calendar to search only those who are scheduled to work on that day.

A description of the criteria you have selected appears in the box on the bottom-right of the screen. Click **OK** to view the results of the search. The skills matrix will now only show those who meet the terms of the skill search.

If no employees match the selection criteria, an error message will be displayed, and you must either revise or cancel your skill search.

5.5 Summary list

The **Summary list** contains three tables, showing the employees who are absent, the employees who are present as scheduled, and the employees who are present unexpectedly. Select this icon:



The **Select range** form will appear, which you should use to select the employees to be included in the summary. Once you have selected which employees to include, the **Summary screen** is displayed. On this screen, there are three tables:

The screenshot shows a software window titled "Summary screen (Employee: 000001..000013)". The window has a menu bar with "File", "Other", "Window", and "Help". Below the menu bar is a toolbar with icons for "Select", "Refresh", and "Exit". A status bar at the top displays "Employees In: 8", "Employees Absent: 0", and "Attendance Num: 0". It also includes a "Sort:" dropdown menu set to "Personnel ref" and an "Auto refresh" checkbox which is currently unchecked. The main area contains three tables:

- Absence:** A table with columns "Employee" and "Clockings". It is currently empty.
- Scheduled attendance:** A table with columns "Employee", "Location", and "Clockings". It contains one row: "000001: A Martins" with clockings "09:00 | 12:00 | 12:30".
- Unexpected attendance:** A table with columns "Employee", "Location", and "Clockings". It is currently empty.

The **Scheduled attendance** table contains the details of all employees who are currently present at work, as they are scheduled to be. Employee's are scheduled to be in during their core hours, but not during overtime, lunch breaks, non-working days or days they were otherwise supposed to be absent.

It shows when the employees clocked in, and any other clockings they may have made today.

The **Unexpected attendance** table shows the details and clockings of any employees who are present when they are not scheduled to be working, for example on their day off or during their lunchbreak.

It shows when the employees clocked in, and any other clockings they may have made today.

The **Absence** table shows all employees who are absent, with details of their absence. This includes both those who are taking a previously planned absence and those who are unexpectedly absent.

The total number of employees in and absent can be seen above the list, with **Employees In** corresponding to **Scheduled attendance**, **Attendance Num** showing the total number of employees present (Scheduled and Unexpected), and **Employees Absent** corresponding to the **Absence** table.

If you wish the list to be updated automatically every few seconds, tick the **Auto refresh** box. This means that, should an employee's status change, e.g., the employee clocks in or out, the table will update to reflect the change. Alternatively, leave the **Auto refresh** box blank so that the list will only be updated when you click the **Refresh** button:



The layout of the screen can be changed by opening the **Window** menu, and selecting different view-types (Tile or Cascade).

5.6 Re-do current period processing

This function is useful if the **Processor** returns incorrect results for a period. For example, employees might have been assigned to the wrong shift or the supervisor might have forgotten to book in a Bank Holiday to the system. In cases like these, it is possible to re-process the current period. See **Period ends** on page 150. The system deletes all work records within the selected date range, re-sets shifts to planned values and then recalculates the hours based upon the clockings.

Select the **Group** menu and then select **Re-do current period processing**. A form similar to the following will then be displayed:

Specify the time period that you want to re-process. If you tick the **Perform recalc after reprocess** the system will automatically go on to re-calculate work records for the period. See **Recalculate work records** on page 71 for more details.

Click **OK**. You will then be prompted to select a suitable range of employees. For more details see **Select range** on page 28.

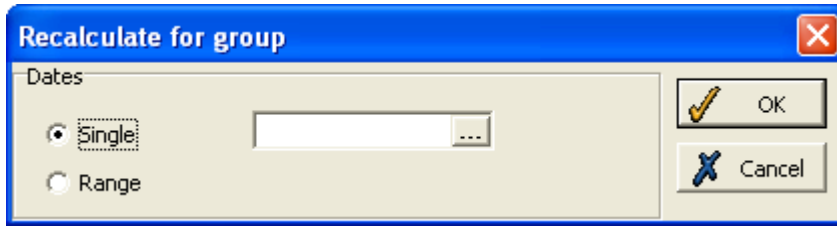
Once you have done this, you will be asked to confirm that you want to perform the task. Click **Yes** to re-do the hours processing.

Note: you can also re-do current period processing for individual employees. Ensure that the relevant employee is selected in the **Employee** drop-down list, select the **Employee** menu and then select **Re-do current period processing**.

5.7 Recalculate work records

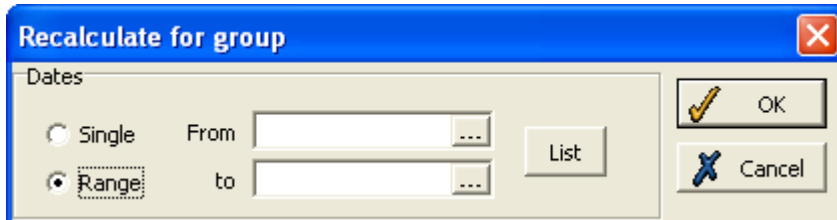
It is possible to recalculate work records for a period, without having to **Re-do current period processing**. **Recalculate work records** simply takes shifts and compares them with an employee's clockings to produce a revised work record, effectively undoing most manual changes.

Select the **Group** menu and then select **Recalculate work records**. The following form should then be displayed:



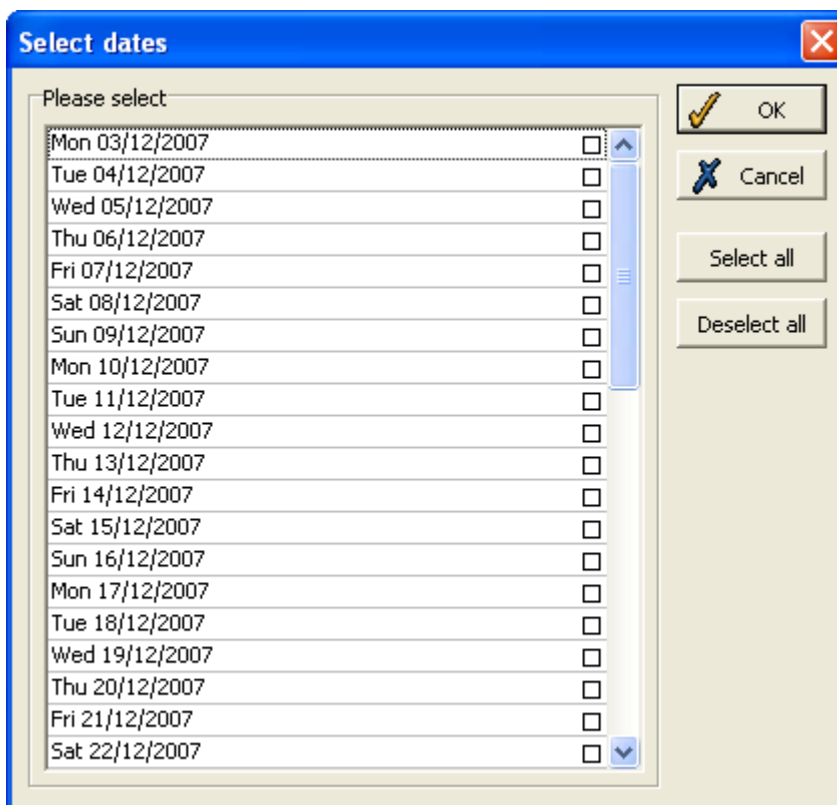
The dialog box titled "Recalculate for group" has a blue header and a close button (X) in the top right. Under the "Dates" section, the "Single" radio button is selected, and a text input field with a calendar icon is visible. The "Range" radio button is unselected. On the right side, there are "OK" and "Cancel" buttons.

Click the calendar button to select the day for which you wish to recalculate work records. You can choose whether to recalculate work records for a **Single** date or a **Range** of dates by clicking on the radio buttons. If you choose **Range** the form will expand as follows:



The dialog box titled "Recalculate for group" is expanded. The "Range" radio button is selected. It now includes "From" and "to" text input fields with calendar icons, and a "List" button. The "OK" and "Cancel" buttons remain on the right.

Choose the required dates using the calendar buttons. You can click the **List** button to display a list of dates in the specified range:



The dialog box titled "Select dates" has a blue header and a close button (X) in the top right. It contains a list of dates from "Mon 03/12/2007" to "Sat 22/12/2007", each with a checkbox. On the right side, there are "OK", "Cancel", "Select all", and "Deselect all" buttons.

| Date | Selected |
|----------------|--------------------------|
| Mon 03/12/2007 | <input type="checkbox"/> |
| Tue 04/12/2007 | <input type="checkbox"/> |
| Wed 05/12/2007 | <input type="checkbox"/> |
| Thu 06/12/2007 | <input type="checkbox"/> |
| Fri 07/12/2007 | <input type="checkbox"/> |
| Sat 08/12/2007 | <input type="checkbox"/> |
| Sun 09/12/2007 | <input type="checkbox"/> |
| Mon 10/12/2007 | <input type="checkbox"/> |
| Tue 11/12/2007 | <input type="checkbox"/> |
| Wed 12/12/2007 | <input type="checkbox"/> |
| Thu 13/12/2007 | <input type="checkbox"/> |
| Fri 14/12/2007 | <input type="checkbox"/> |
| Sat 15/12/2007 | <input type="checkbox"/> |
| Sun 16/12/2007 | <input type="checkbox"/> |
| Mon 17/12/2007 | <input type="checkbox"/> |
| Tue 18/12/2007 | <input type="checkbox"/> |
| Wed 19/12/2007 | <input type="checkbox"/> |
| Thu 20/12/2007 | <input type="checkbox"/> |
| Fri 21/12/2007 | <input type="checkbox"/> |
| Sat 22/12/2007 | <input type="checkbox"/> |

This form allows you to select specific dates within the specified range. You can **Select all** or **Deselect all** these dates using the buttons to the right of the form.

When you have selected an appropriate date or date range, click **OK**. You will then be prompted to select a suitable range of employees. For more details see **Select range** on page 28. The system will now recalculate work records accordingly.

6 Mass change

The **Mass change** facility enables you to edit, update or add new records for a range of people at the same time.

There are two options on the top of the **Mass change** menu: **New mass change**, which allows you to define the details of a new mass change that you wish to perform, and **Run mass change**, which allows you to run a mass change that has previously been saved.

6.1 Mass change on non multi-line records

This section explains how to define a new mass change for the majority of fields - those that are not multi-line. First, select **New mass change** to display this form:

Mass change

Edit records Update/Add records

Include leavers

Table and field selection

Table
Main employee details

Fields
ADDR1
ADDR2
ADDR3
ADDR4
ALTADDR1
ALTADDR2
ALTADDR3

+ Add field

Selected fields

| Field | New value |
|-------|-----------|
| | |

OK
Cancel
Help
Clear

You can make the mass change in either **Edit** or **Update** mode see **Using Edit and Update**, page 38, for details on which to use in which circumstances.

If you select **Update/Add records**, you will need to enter the effective date on which you wish the field values to change.

In the **Table** drop-down list, select the table containing the field you wish to change. You will then be able to select the required field from the list below. Highlight the field you wish to change and click the **Add field** button. This moves the field into the **Selected fields** box below.

You must now enter the new value you wish the field to change to. Click in the **New value** box and enter the value to change to. Some fields may have a drop-down list from which you can select the new value. For numeric fields, it is possible to enter one of these symbols:

+ - * / followed by a value

For instance, if a number of employees are to have their pay increased by 5%, then select the field PR.PAYVALUE and in the new value box type *1.05. The new value of PR.PAYVALUE will then be obtained by taking the current value and multiplying it by 1.05.

Note that if the field you are changing is relevant to leavers as well as current employees, tick the **Include leavers** box.

Select employees to include

Click **OK** and the **Select range** form will appear, which you should use to select which employees are to be included in the change. Once you have selected the range in the normal way, click **OK**; this opens the following form:

This allows you to make a more advanced selection of employees to include in the mass change. The above example specifies that the mass change is only applicable to employees who started at the company before 1st October 2006. Note that any selection criteria you enter will only apply within the range that you selected previously on the **Select range** form (i.e., if departments 12-14 were selected, then this example would apply to all employees in departments 12-14 who started before 1st October 2006).

See the **Report Writer** user guide for more details on selections.

Confirmation

Click **OK**. A table like this is displayed:

| Employee | Field | Old value | New value |
|---------------------|---------------|-----------|-----------|
| 033065 Garfield S | TMSTMS.ACSREF | 1 | 2 |
| 070003 Forrester N | TMSTMS.ACSREF | 2 | 2 |
| 070004 Faraday S | TMSTMS.ACSREF | 1 | 2 |
| 100002 Stephenson S | TMSTMS.ACSREF | 1 | 2 |
| 118855 Dawes J | TMSTMS.ACSREF | 1 | 2 |
| 119944 Jenks M | TMSTMS.ACSREF | 1 | 2 |
| 224466 Patterson J | TMSTMS.ACSREF | 1 | 2 |

The fields will be updated in UPDATE mode for 28/01/2008

Any changes displayed in red (#) are invalid due to limiting code restrictions and will not take place
Any changes displayed in green (*) will lead to invalid limited codes but will still take place
Any changes in blue (+) are invalid due to the employee's view but will still take place

This table lists all the employees for whom the mass change will take place. You have the option to delete employees from the list or to change individual values.

To change the new value for an employee, click in the relevant employee's **New value** column and enter a different value.

If you wish to delete an employee from the mass change, click in the grey box to the left of that employee's record. Then confirm the deletion when prompted. If multiple records are being changed, make sure that you delete **ALL** lines referring to that employee (where necessary). This is particularly important whenever the change is being run in **Update** mode as you will have to delete not only the field but also the related date.

NB: If any of the employee records in this table are highlighted in red, green or blue, see **Maintain validity of data**, page 76, for details on what action to take.

If you wish, you can save the change before going ahead - to do this, click the **Save as...** button. You will then be required to enter a unique name and a description of the change. Click **OK**, and the mass change is stored to the file. You will then be able to access the mass change again by using the **Run mass change** function, and selecting it from the list of all saved mass changes.

Once you are satisfied that the form represents the changes you wish to make, click **Run** to perform the mass change, and then confirm the action when prompted.

When the mass change is completed, you will be asked if you wish to perform another mass change. If not, click **No** to leave the mass change form.

Tips

- Clicking on **Cancel** anywhere within the forms mentioned above returns you to the previous form in the sequence. This enables you to see the consequences of selecting different fields or selection criteria without having to commit to the change.

6.2 Mass change for multiple fields

If you wish to perform a mass change for numerous fields in the same, or in different tables, simply select all the required fields one by one so that they are displayed in the **Selected fields** list, like this:

Selected fields

| Field | New value |
|---------------|-----------|
| TMSTMS.ACSREF | |
| OD.DEPARTMENT | |
| | |

This shows that the employees' access group and department will be amended.

Follow the same procedure as that used to change a single field, until the confirmation table appears, like this:

Mass change confirmation

| Employee | Field | Old value | New value |
|---------------------|---------------|-----------|-----------|
| 033065 Garfield S | TMSTMS.ACSREF | 1 | 3 |
| 033065 Garfield S | OD.DEPARTMENT | 31 | 35 |
| 070003 Forrester N | TMSTMS.ACSREF | 1 | 3 |
| 070003 Forrester N | OD.DEPARTMENT | 31 | 35 |
| 070004 Faraday S | TMSTMS.ACSREF | 1 | 3 |
| 070004 Faraday S | OD.DEPARTMENT | 31 | 35 |
| 100002 Stephenson S | TMSTMS.ACSREF | 1 | 3 |
| 100002 Stephenson S | OD.DEPARTMENT | 31 | 35 |

The fields will be updated in UPDATE mode for 28/01/2008

Any changes displayed in red (#) are invalid due to limiting code restrictions and will not take place
 Any changes displayed in green (*) will lead to invalid limited codes but will still take place
 Any changes in blue (+) are invalid due to the employee's view but will still take place

Run
 Cancel
 Print
 Save as...

Notice that a separate line is given for each change, so in this instance there are two lines for each selected employee.

Again, check that the correct information is going to be changed for the required employees. If you wish to delete an employee from the mass change, remember to delete each individual line relating to that employee.

Then either save or run the mass change in the same way as explained above.

6.3 Mass change for leavers

By default, leavers will be excluded from any mass change. If you do need to include them tick the **Include leavers** option on the first screen. This will include currently employed people and leavers. If you wish to restrict it to leavers only you will need to enter **CE.Status1='L'** on the **Advanced selection** form ('L' represents leavers).

6.4 Maintain validity of data in mass change

If any of the codes in your system use limited pairs or views, it is important to bear in mind how a mass change can affect the validity of these codes (see **Maintain codes** on page 37 for Access Control and **Views**, page 294, for details on views). If your mass change will have an effect on a limited code, you will notice on the **Mass change confirmation** screen that the records are

highlighted in red or green. If the mass change is invalid because of the employee's view, it will be shown in blue.

Red

The mass change function will not allow you to change a code that is limited by another if the new value entered would be made invalid by the limiting field.

For example, an employee whose **Job grade** is G1, where job grade G1 limits the **Job title** field to Manager or Assistant Manager: if you make a mass change of a group of employees' job titles to Department Supervisor, the employee in grade G1 will not be changed.

Any invalid 'changes' like this will be displayed in red on the **Mass change confirmation** screen and will not be allowed to take place. You can delete the employee from the mass change or cancel the mass change altogether.

Green

Mass change does allow you to change the code in the limiting field, even if this causes the code in the limited field to be invalid. These changes will be displayed in green on the **Mass change confirmation** screen. This alerts you that a further change is required to make the limited code valid.

For example, you have an employee whose **Job grade** is G1 and whose **Job title** is Assistant Manager: you then create a mass change of employees' job grades to G2, but job grade G2 only allows the job title to be Trainee, Junior Technician or Apprentice.

This change will be displayed in green on the **Mass change confirmation** screen. It will be allowed to take place, but will cause an invalid limited code, meaning that you must later change the limited code. Alternatively, delete the employee from the mass change, or cancel the mass change altogether.

Blue

If a record is written in blue, this means that the code being entered, although valid in the user's view, is invalid in the employee's view.

In this case, the change will take place, but you should note where the invalid code is, so that later you can either change the invalid code or change the way the employee's view is set up.

6.5 Mass change on multi-line records

The **Mass change** function can be used to add new records to a multi-line table, and to edit existing records of a multi-line table.

6.5.1 Add records to multi-line tables

You may wish to add records to multi-line tables when, for example, a group of employees have all attended the same training course. To do this, open **New mass change** and select **Update/Add records**. Ignore the date box, as it is not relevant to multi-line records. Now select the multi-line table that you wish to update. In this example, **Training details** has been chosen:

Mass change

Edit records
 Update/Add records

Include leavers

Table and field selection

Table
Training Details

New record

| Field | Value |
|----------------|-------|
| AWARDBODY | |
| COMPLETIONDATE | |
| DETAIL | |
| GRADE | |
| REVIEWDATE | |
| STARTDATE | |
| SUBJECT | |
| TRAINLEVEL | |
| TRAINNOTE | |
| TRRAINTYPE | |

Buttons: OK, Cancel, Help, Clear

All the fields of the table are now shown in the **New record** box. You must now enter a new value for at least one of the fields from the table. Click **OK** to move on to the **Select range** form. Once you have done this, you will again see the **Advanced selection** form, which can be completed in the same way as for non multi-line tables. You will then see a confirmation screen like this:

Mass change confirmation

A record will be added to 'TR' with the following field values:

| AWARDBODY | COMPLETIONDATE | DETAIL | GRADE | REVIEWDATE | STARTDATE | SUBJECT |
|-----------|----------------|--------|-------|------------|------------|---------|
| CG | 01/10/2007 | BF001 | E | 01/10/2008 | 08/10/2007 | BF |

for the employees listed below:

| Employee |
|---------------------|
| 033065 Garfield S |
| 070003 Forrester N |
| 070004 Faraday S |
| 100002 Stephenson S |

Buttons: Run, Cancel, Print

The upper box shows the record that will be added to the **Training details** table for all the employees listed in the lower box. Should you need to, you are again able to delete employees from the list by clicking in the left-hand margin next to the employee and confirming when prompted.

Click **Run** to continue with the mass change, and then confirm that you wish to continue.

The mass change will be performed for the selected employees. When you now go into the relevant employee's training records you will see that the additional record has been added.

6.5.2 Edit multi-line records

You can also use the **Mass change** function to modify an existing record in a multi-line table rather than to add a new record. This may be particularly useful if you have added a record by mass change, and need to edit its details (e.g., if you previously entered details of a training course for employees, you could now specify which employees passed the course).

You need to use the **Advanced selection** option with care to ensure you select the correct records. To edit multi-line records, select **New mass change** and select the **Edit records** box. Select the required table, and the fields that you wish to edit. You can then enter the **New value** for these fields:

Mass change

Edit records Update/Add records

Include leavers

Table and field selection

Table
Training Details

Fields
DETAIL
GRADE
REVIEWDATE
STARTDATE
SUBJECT
TRAINLEVEL
TRAINNOTE

+ Add field

Selected fields

| | Field | New value |
|--|---------------|-----------|
| | TR.TRAINLEVEL | L1 |
| | TR.GRADE | A |
| | | |

OK
Cancel
Help
Clear

In this example, the level and grade achieved are being edited - these may have been left blank originally, or you may be replacing a value previously entered. Click **OK** to move on to the **Select range** form, where you should select the range of employees.

You then see the **Advanced selection** form. Instead of using this to select the employees, you should enter an expression which identifies which records are being modified.

If you leave this form blank, all training details records for the employees within the selected range will be modified. In this example, it only the records relating to a particular training course are required, so enter an expression which identifies this course, such as the date it took place and the type of course:

TR.DETAIL = 'BF001' and TR.STARTDATE = @08.10.2007

This will select all records (belonging to the selected range of employees) of the detail 'BF001' and which were started on 08.10.2007. Click **OK** to open the **Mass change confirmation** screen:

The following records in 'Training details' will be amended:

| | Award body | Completion | Detail | Employee | Grade | Review | Start date | Subject | Level | Type |
|--------------------------|------------|------------|--------|--------------------|-------|------------|------------|---------|-------|------|
| <input type="checkbox"/> | CG | 01/10/2007 | BF001 | 033065 Garfield S | E | 01/10/2008 | 01/10/2007 | BF | | |
| <input type="checkbox"/> | CG | 01/10/2007 | BF001 | 033065 Garfield S | E | 01/10/2008 | 08/10/2007 | BF | | |
| <input type="checkbox"/> | CG | 01/10/2007 | BF001 | 070003 Forrester N | E | 01/10/2008 | 01/10/2007 | BF | | |
| <input type="checkbox"/> | CG | 01/10/2007 | BF001 | 070003 Forrester N | E | 01/10/2008 | 08/10/2007 | BF | | |
| <input type="checkbox"/> | CG | 01/10/2007 | BF001 | 070004 Faraday S | E | 01/10/2008 | 01/10/2007 | BF | | |
| <input type="checkbox"/> | CG | 01/10/2007 | BF001 | 070004 Faraday S | E | 01/10/2008 | 08/10/2007 | BF | | |

The field values below will be inserted:

| Level | Grade |
|-------|-------|
| L1 | A |

Any changes displayed in red (#) are invalid due to limiting code restrictions and will not take place
 Any changes displayed in green (*) will lead to invalid limited codes but will still take place
 Any changes in blue (+) are invalid due to the employee's view but will still take place

The top box lists all records which will be changed, with the new values that will be entered shown in the box below. As with the other **Mass change confirmation** screens, if any records are written in red, green or blue, it means that this change creates invalid data (see **Maintain validity of data**, page 76, for details).

Again, you can delete any records that you do not wish to change by clicking in the grey box on the left-hand side next to an employee, and confirming when prompted.

When the box shows all records that you wish to amend, click **Run** to proceed.

6.6 Planned shift change for range

To set up a shift change that affects a range of employees, select **Planned shift change for range** from the **Mass change** menu. The following form appears:

Planned shift change for range of employees

Action: Add Remove

Shift: [Dropdown]

Date: 03/05/2007

Buttons: Apply, Cancel

Add a planned shift change

First, ensure **Add** is ticked.

If, for example, you wish to make an entire department work a particular shift on one day, then select the required shift from the drop-down list, and then enter the date for the shift change to be applied. Click the **Apply** button, which then brings up the **Select range** form, which you should use to select the employees who will change shifts (see page 28 for details).

Remove a planned shift change

To remove a shift change that was previously entered, tick the **Remove** box instead of **Add**. Select the same shift and the same date as were selected when the shift change was added. Then click

Apply, and use the **Select range** form to choose which employees should be removed from the shift change plans. To reverse the shift change from all employees, select the same range as was originally chosen for the change.

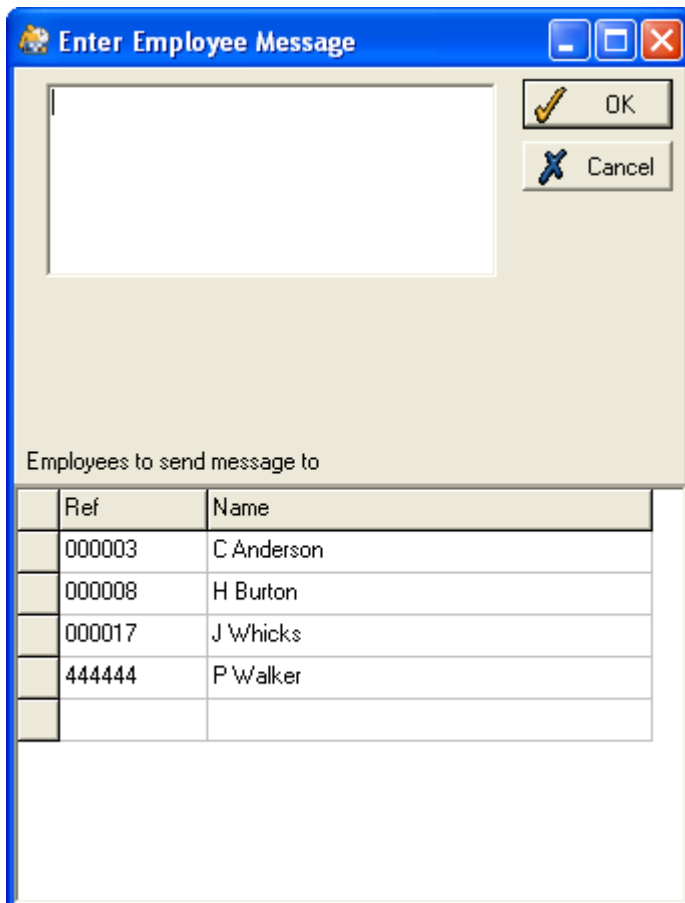
To remove the shift change from some employees, while retaining it for others, select only the employees who should be returned to their original shift. For example, if the shift change was originally entered for all, but now one department is to revert to its original shift pattern, select just this department on the **Select range** form. The shift change will still apply to all other employees.

NB: It can often be useful to use the **Future Work Planner** to make planned shift changes for employees. See **Modify planned shifts**, page 160.

6.7 Send message to employees

This option allows you to write a short message to be sent to a range of employees, which will be shown the next time the employees use the clocking terminals.

Select **Send message to employees** from the **Mass change** menu. A **Select range** form will be displayed (see page 28 for details), allowing you to choose which employees should receive the message. Once you have selected the range, a form like this appears:



The screenshot shows a dialog box titled "Enter Employee Message". It has a large text area at the top for entering a message. Below the text area are "OK" and "Cancel" buttons. At the bottom, there is a table titled "Employees to send message to" with two columns: "Ref" and "Name".

| Ref | Name |
|--------|------------|
| 000003 | C Anderson |
| 000008 | H Burton |
| 000017 | J Whicks |
| 444444 | P Walker |
| | |

The bottom section shows all employees you selected to receive the message. The empty box at the top of the form is the space in which you should write the message.

Click **OK** to confirm sending the message. When each of the employees next clocks in or out at the terminal, the message will be displayed.

6.8 Download all employees

This option should be selected from the **Mass change** menu when you need to ensure that any changes you have made to the employees' records are registered immediately with the terminals (i.e., clocking machines). Unless this is done, the terminals will not recognise any amendments until they are automatically updated, a process which occurs at a set time each day. This could cause problems if new employees have been added, existing employees have been given a new badge number, or other important details have been altered.

6.9 Mass Roster Change

This option is accessible via the **Mass Change** menu on the **TMS** main form. It allows you to change multiple rosters at the same time. Select **Mass Roster Change** from the menu and a screen similar to the following should appear:

Select a roster to change, and then select whether you wish to edit records or add/update records, and whether or not you wish to include the records of those who have left. Once you have done this, select 'Ok' and you will be able to alter records as specified above for shifts.

6.10 Planned TAS clockings for range

It is possible to plan in multiple TAS clockings for a range of employees within **TMS**. For more details of TAS clockings see **Maintain TAS clockings** on page 175. Select the main **Mass change** menu and then select **Planned TAS clockings for range**. The following form will then be displayed:

| Type | Date | Time | Parameters |
|------|------|------|------------|
| | | | |

Type

- TAS
- Planned TAS
- TAS
- Planned TAS

To enter planned TAS clockings for employees, click the **Add** button and the following form will then be displayed:

Clocking type

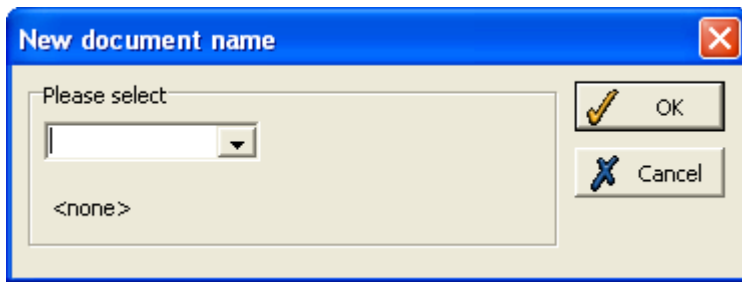
Date/Time

0:00

Parameters

Hours/Qual: [dropdown]

Enter an appropriate **Date/Time** for the clockings to be implemented; then click the button alongside the **Parameters** field to display the following form:

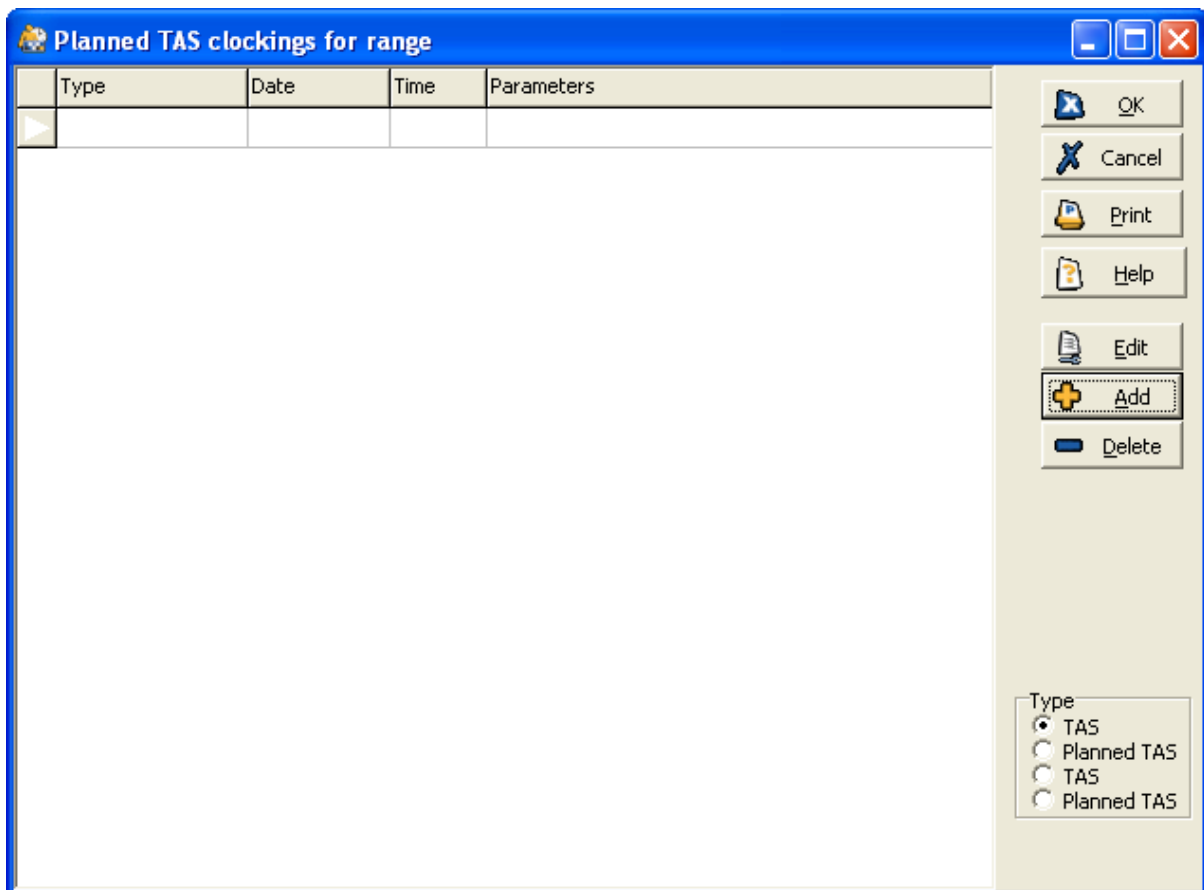


Select the appropriate TAS parameters and then click **OK**.

You can use the **Hours/Qual** field at the bottom of the **Add/Edit clocking** form to specify a particular hours category to the planned TAS clockings. For example, you might want to set the planned TAS work as overtime.

Click **OK** when you have filled in the **Add/Edit clocking** form correctly. You will then be asked to specify a range of employees over which to distribute the TAS clockings. For more details of how to specify a range see **Select range** on page 28.

The planned TAS clockings you have set up will then appear on the **Planned TAS clockings for range** form as follows:



Go to the **Recent clockings** form of the relevant employees to view the planned TAS clockings.

7 Badges

7.1 Employee badge number

Each employee who is included in TMS must be assigned a unique badge number, which is used by TMS to identify the clockings. The badge (sometimes known as a clock card) is used to register the employee's attendance at work. When an employee clocks in or out the badge number will be recorded in the TMS database, and used to give all kinds of information for the employee's work record.

It is important that you enter the badge number correctly because it will be processed by TMS in the exact way it is entered (e.g., a badge number of 001 is different to that of 0001 - each digit is significant). Your system administrator will inform you whether the badge number should be numeric, alphabetical or alphanumeric.

Mitrefinch strongly recommends that each badge number has the same number of characters. The system can be set to ensure this automatically. For example, if all your badge numbers have six characters, when a badge number of '23' is entered, it will automatically be assigned as '000023'. To turn this option on or off, open **Maintain preferences** from the **System** menu, and select the **General** tab. Tick or un-tick the box marked 'Enforce fixed badge number length', as required.

When entering a new employee, it is important to be aware that the badge cannot be used until the terminals have been updated. To do this, select **Download current employee** from the **Employee** menu, and then confirm the action.

7.1.1 Issuing a replacement badge

There are three ways to permanently replace a badge. The first is just to give the employee an exact copy of the old one. This has the disadvantage that, if the old badge is found, it will still be valid.

Another way is to change the employee's badge number (see below).

Thirdly, if your system is set up to allow the use of badge version numbers, you can retain the original badge number, but change the version number to indicate that the employee is not using the same badge as the old one (see below for details).

The last two methods render the old badge invalid for clocking purposes.

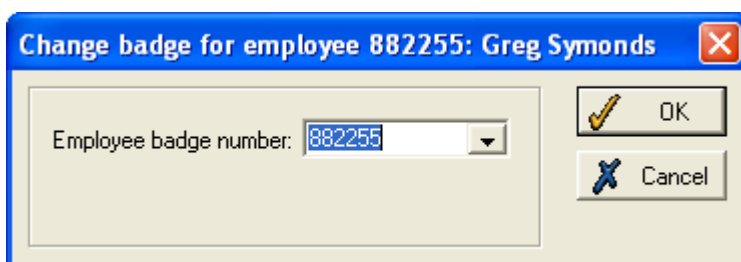
NB: Employees can be assigned with temporary badges, that can last for one day (e.g., if an employee forgets his or her badge one morning), or for any required duration. For details on issuing an employee with a temporary badge, see **Maintain temporary badges**, page 87.

7.1.2 Change badge number

To change the employee's badge number, either select **Change badge** from the **Employee** menu, or, while on the **Employee details** form, click this icon:



The following box appears:

A screenshot of a Windows-style dialog box titled 'Change badge for employee 882255: Greg Symonds'. The dialog has a blue title bar with a close button (X) on the right. Inside, there is a text field labeled 'Employee badge number:' containing the value '882255'. To the right of the text field are two buttons: 'OK' with a yellow checkmark icon and 'Cancel' with a blue X icon.

The employee's current badge number is shown in the **Employee badge number** box, and you should replace this with the new number you wish to assign to this employee. The new badge number must be unique, i.e., a number that is not already in use by another employee. Click **OK**, and the new badge number will be applied to the employee.

Before the employee can clock again, you must issue him or her with a replacement badge bearing the new number. This new badge cannot be used until the terminals have been updated. To do this, open the **Employee** menu and select **Download current employee**. Confirm the action, and the terminals will now recognise the new badge number.

NB: Because changing an employee's badge number renders the old badge invalid, you must take additional action if a Mitrefinch Access Control or Fire Evacuation System is installed - see your system administrator for advice.

7.1.3 Change badge version number

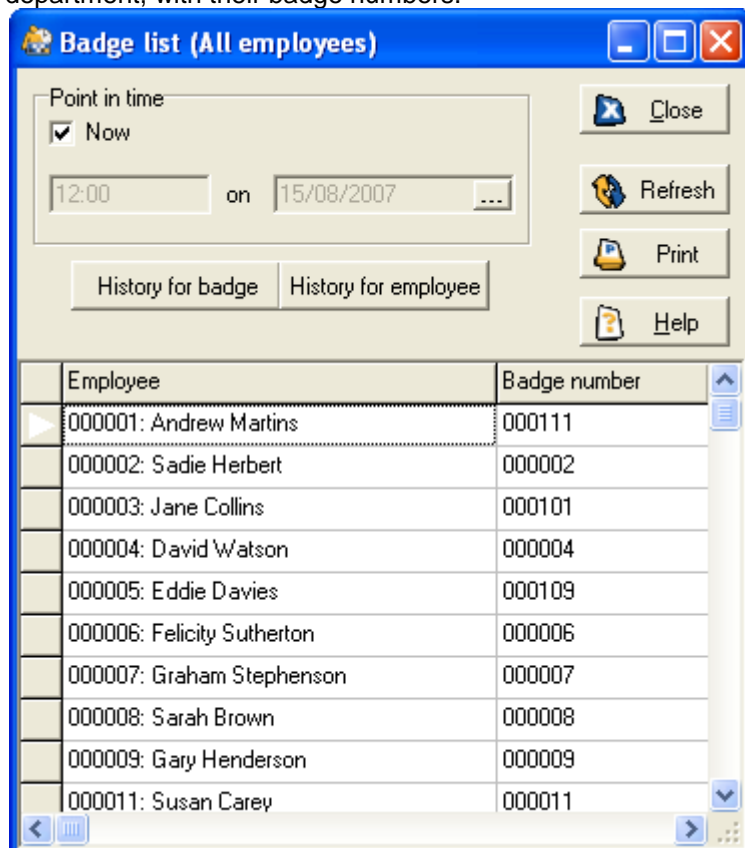
Systems can be set up to allow or prevent the use of badge version numbers.

To change an employee's badge version number, either select **Change badge** from the **Employee** menu, or, click the icon on the **Employee details** form. If your system allows version numbers, you should enter the next version in the sequence.

Changing the version number has the same consequences as changing the badge number itself (see above for details).

7.2 Badge list

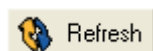
Select **Badge list** from the **Group** menu, to see a list of all the employees in your selected department, with their badge numbers.



To view the history of a badge, i.e., which employees have used it, and when it was issued to them, first select the badge required by clicking in its row, then click the **History for badge** button. A form will appear, showing the date the badge was issued, and the date the badge became invalid.

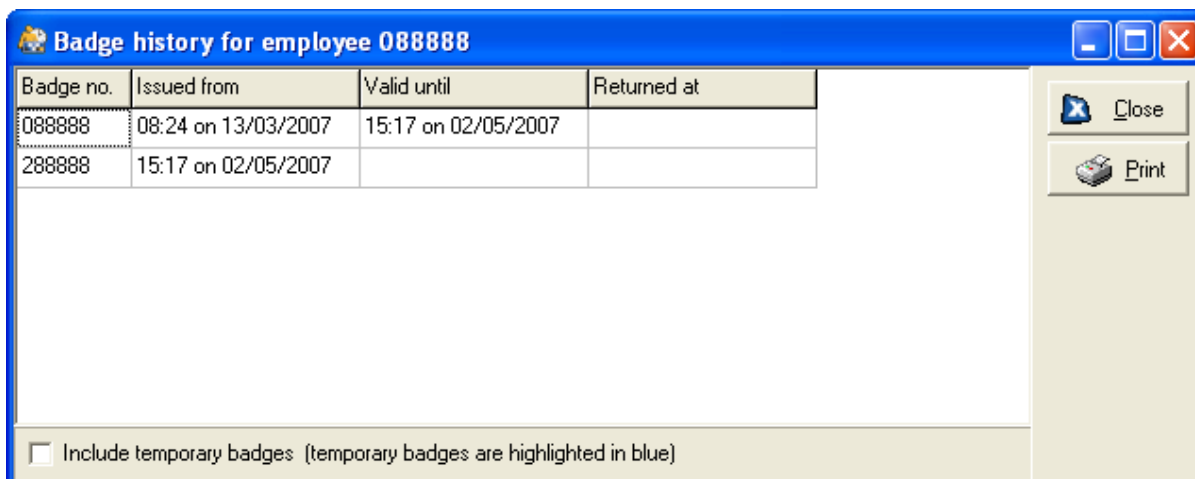
To view the employee history, i.e., all the badges used by the employee, with the dates they were issued and the dates they were valid until, click **History for employee**. The same table is displayed as that shown below, accessed from the employee's **Badge history**.

Should you need to view the badge and employee histories for any time on any date, clear the 'Now' box and enter a **Point in time**, then click the **Refresh** button:



7.3 Badge history

Select **Badge history** from the **Employee** menu to view all the badges that the selected employee has used, along with the dates when they were issued:

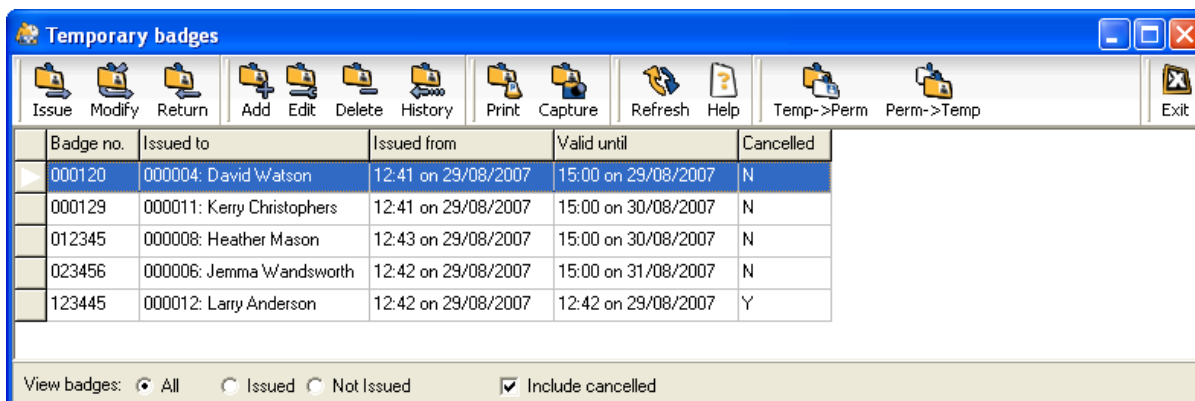


7.4 Maintain temporary badges

Introduction

If an employee forgets his or her badge one morning, it would be time-consuming and expensive to produce a new badge just for one day. The temporary badge facility makes it possible to keep a small stock of spare badges which can be temporarily assigned to employees.

To view the details of all temporary badges that exist on your system, select **Maintain temporary badges** from the **Badges** menu. A screen like the following appears:



On the above screen, notice that **All** has been selected in the 'View badges' section at the bottom, meaning that all temporary badges are shown on the list above. To filter the list, select either only those badges that are currently **Issued** to an employee, or only those **Not Issued**. On this example, the **Include cancelled** box is ticked. This should be cleared if you wish to exclude cancelled badges

from the display. Cancelled badges are those that can no longer be issued to employees, but cannot be deleted because they contain historical information.

7.4.1 Issue a badge

Temporary badges can only be issued to existing employees.

To issue a temporary badge to an employee, select the required badge on the list (ensuring it is not already issued to an employee), and click the **Issue** icon. This form appears:

Select the required employee from the drop-down list at the top of the form.

The bottom half of the form allows you to specify when the badge will be **Valid until**. If 'Time of return' is ticked, the badge will be valid until it is returned. Alternatively, you can enter a time and date when the badge will automatically become invalid. Click **OK** and the badge will be issued to the employee.

There is another method of issuing a temporary badge to an employee, without using the **Maintain temporary badges** table. Open the **Employee** menu on the main form, when the required employee is selected, and from **Temporary badges** select **Issue temporary badge**. The following screen appears:

Select a **Badge number** from the drop-down list (the list only contains badges that are available for issue). Choose when the badge will become invalid, in the same way as explained above, and click **OK**.

Once a badge is issued, it stays issued until it is returned, even if it is cancelled or becomes invalid.

NB: An employee can be issued a temporary badge while they are still using a temporary badge, but issuing a temporary badge invalidates all other temporary badges issued to that employee.

Before a temporary badge can be used, the terminals must be updated. This can be done for the individual concerned, by selecting **Download current employee** from the **Employee** menu, or for the entire system by selecting **Download all employees** from the **Mass change** menu.

7.4.2 Return a badge

When an employee no longer needs a temporary badge (e.g., he or she has found the permanent badge, or been given a new one), it should be returned, so that it can be issued to another employee. This can be done on the **Maintain temporary badges** table, by selecting the badge and clicking **Return**. Confirm the return, and the badge is now available to be issued to someone else.

7.4.3 Change a badge's 'valid until' date

Should you need to change the time or date when an issued badge will remain valid until, click **Modify** to display this form:

Enter into the boxes the new time and date when the badge will remain valid until. Alternatively, click **Now** to make the badge become invalid immediately, or click **Clear** if you do not wish to specify a time, which means it will remain valid until it is returned. Whether the badge is valid or not, it will stay issued to the employee until it is returned.

7.4.4 Create a new badge

Click **Add** to bring up this form:

Enter the number for the new badge. This must be a number not already in use as an employee badge number or temporary badge number. You can also define a **Version** number for the badge. This feature is useful for protecting access security if a temporary badge is lost. For example, if 'temporary badge 1' is lost, a replacement can be created with a different version number, rendering the original badge invalid.

If you wish to create multiple badges, tick the **Range** box, and you can then enter a **Quantity** of badges to be created. The additional badges will take consecutive numbers from the entered number. For example, if the badge no. entered is '000100', and you have selected a quantity of three badges, badges '000100', '000101' and '000102' will be created.

All badges created are available for use immediately.

7.4.5 Cancel a badge

If a temporary badge has been lost or damaged, or cannot be used again for any other reason, you should cancel it. You can cancel a badge whether or not it is currently issued to an employee. If it is, it becomes invalid immediately, but is still displayed as issued to the employee. If it is not currently issued, cancelling it prevents it from being issued again.

To cancel a badge, within the **Maintain temporary badges** table, click **Edit** to produce this form:

The screenshot shows a dialog box titled "Badge 000129". It contains a "Badge Properties" section with two fields: "Cancelled" (a dropdown menu currently showing "N") and "Version" (an empty text box). To the right of these fields are two buttons: "OK" (with a pencil icon) and "Cancel" (with a blue 'X' icon).

Change the **Cancelled** entry to 'Yes'. Click **OK** to save (the badge will disappear from the table unless the **Include cancelled** box, at the bottom, is ticked).

If the badge turns up again, its cancellation can be reversed, by changing the **Cancelled** entry to 'No'. This makes it available for use again. You can also specify which version of the badge is being cancelled.

7.4.6 Delete a badge

A badge can only be deleted completely if it has never been issued. Simply click the **Delete** button and confirm the deletion. Badges that have previously been issued can be cancelled (see above).

7.5 Maintain visitor badges

7.5.1 What is a visitor badge?

Visitor badges are similar to temporary badges, but temporary badges can only be issued to people who are already on the system. Visitor badges allow you to control the access of non-employees who are on the site for any reason, and who need a badge for security or access purposes.

Selecting **Maintain visitor badges** from the **Badges** menu produces a table like this:

The screenshot shows the 'Visitor badges' application window. The title bar reads 'Visitor badges'. The menu bar includes: Issue, Modify, Return, Download, Add, Add Range, Edit, Delete, History, Range, Print, Picture, Refresh, Help, and Exit. The main area contains a table with the following data:

| Badge no. | Badge type | Issued to | Vehicle reg. | Issued from | Valid until | Access group | Last access time |
|-----------|----------------|-----------------|--------------|---------------------|---------------------|--------------|------------------|
| 000126 | Visitor Type 1 | Miss A Lavender | | 16:47 on 13/07/2006 | 23:59 on 15/07/2006 | ADMIN | |
| 000127 | Visitor Type 2 | R Sanderson | | 12:51 on 29/08/2007 | 12:53 on 29/08/2007 | ADMIN | |
| 000145 | Visitor Type 1 | G Birkinshaw | | 12:52 on 29/08/2007 | 15:00 on 30/08/2007 | SEC | |

At the bottom of the window, there are radio buttons for 'View badges: All', 'Issued', and 'Not issued', and a 'Text filter:' input field.

The table is similar to the **Maintain temporary badges** table (see above for details). Note that badges which should have been returned appear with a light blue background.

7.5.2 Issue a visitor badge

To issue a visitor badge, select the badge and click the **Issue** button. The following form is displayed:

The screenshot shows the 'Issue visitor badge 432647' form. The form is divided into several sections:

- Badge recipient details:** Includes text boxes for 'Initials:', 'Surname:', 'Visitor company:', and 'Car Registration:'.
- Contact details:** Includes a text box for 'Visitor contact:' and a text area for 'Visitor notes:'.
- Access group:** A dropdown menu showing 'SEC' and 'Full Access'.
- Valid until:** A time selection area with '0:00' and 'on' followed by a date selection box with a calendar icon. Below this are 'Now' and 'Clear' buttons.

On the right side of the form, there are three buttons: 'OK' (with a checkmark icon), 'Cancel' (with an 'X' icon), and 'Print' (with a printer icon).

The visitor's details should be entered, for reference purposes. You should also select an **Access group**. The drop-down list contains all the access groups that have been set up for use by employees, and a visitor's access can be controlled in the same way (i.e., which doors can be opened, and which areas can be accessed at set times).

Enter the time and date the badge will remain **Valid until**. Alternatively, click the **Now** button to make the badge invalid immediately, or click **Clear** if you wish the badge to be valid until it is returned by the visitor.

If required, select a **Department** from the drop-down list for the visitor to be associated with.

Click **OK** to issue the badge to the visitor.

You can also issue multiple visitor badges at a time, by clicking the **Range** button. The following form appears:

Select the **Start badge** and **End badge** of the range. You can only select badges that are already in the visitor badge list.

Then choose the time period during which the visitor badges will be valid, and click **OK**.

7.5.3 Return a visitor badge

When the badge is no longer needed by the visitor, it should be returned, so that it is available to be issued to somebody else. Notify TMS by clicking the **Return** button and then confirming that the badge has been returned.

7.5.4 Modify a badge

Should you need to change the date when a badge is valid until, or any other details about an issued badge, click **Modify** and you will see the same form as that used for issuing a badge (see above). Change any of the details in the same way, and then click **OK**.

To change a visitor badge type (see **Visitor badge types**, below, for details) click the **Edit** button and select the correct type from the drop-down list.

7.5.5 Create a new badge

Click **Add** to display this form:

Enter the number for the new badge. The number must be unique, and not already used for any kind of badge. Select the **Type** (for details see **Visitor badge types**, below). Next give the badge a

Version number. This option is useful for protecting access security if a visitor badge is lost. For example, if 'visitor badge 1' is lost, a replacement can be created with a different version number, rendering the original badge invalid. Click **OK** to add the new badge to the list.

7.5.6 Delete a badge

Click the **Delete** button if you wish to remove permanently a visitor badge. You will be prompted before you can continue, because deleting the badge will remove all associated historical details, such as who used it and when.

7.6 Visitor badge types

If you use a number of visitor badges, it can be useful to use different visitor badge types. This would allow you to have, for example, a stock of badges to be issued to day visitors, and another stock used for those who visit for a whole week.

Select **Visitor badge types** from the **Badges** menu, to see a table showing all the visitor badge types currently in use on your system:

| Visitor badge type | Description | AutoID badge design | Default access group | Default valid for |
|--------------------|----------------|---------------------|----------------------|-------------------|
| VIS1 | Visitor Type 1 | TEST | SEC | INDEF |
| VIS2 | Visitor Type 2 | TEST | ADMIN | DAY |

If you need to change the code used to refer to a badge type, click the **Rename** button and then enter the new code.

To add, delete or edit a visitor badge type, click the **Modify** button to the right of the table. You can then enter new details in each of the columns:

- **Visitor badge type** - a unique code used by the system to refer to this badge type.
- **Description** - enter a description that makes it clear what the badge is used for.
- **AutoID badge design** - if you have Mitrefinch AutoID set up, use this drop-down list to choose how badges of this type are designed.
- **Default access group** - you can select an access group to be the default for each badge of that type. The default value can be changed when the badge is issued.
- **Default valid for** - the length of time badges of this type are valid for, by default. This value can be changed when the badge is issued.
- **AutoID stationery** - the drop-down list contains different styles of badge stationery, which can be set up if you use Mitrefinch AutoID.

If you need to delete a visitor badge type, click on the white arrow to the left of the row, and select **Delete entry** in the pop-up box that is displayed. If this type is currently being used by any visitor

badges, an error message will prevent the badge type from being deleted. Click the **Find use** button, and you will be able to see which badge numbers, and employees, are using this type. You will need to change all these badges to a different type, using the **Maintain visitor badges** table (see above), before the type can be deleted.

Click **Apply** when you have made all necessary changes.

8 Hours categories

8.1 Worked hours

Select **Worked hours** from the **Hours categories** sub-menu. A form similar to the following should be displayed:

| Code | Description | Color |
|-------|-------------------|-------------|
| BH | Basic & hours | Cyan |
| LUNCH | Lunch | Dark Blue |
| OT1 | Time and a half | Pink |
| OT2 | Double time | Blue |
| OU | Overtime (unpaid) | Yellow |
| P1 | Premium 1 | Green |
| P2 | Premium Hours 2 | Red |
| SHIFT | Shift | Olive Green |
| UP | Unpaid | Orange |

This form displays contains all the categories of worked hours codes used on your system, e.g., **BH** for Basic hours, **OT** for Overtime. Some of these will have been customised for your organisation.

8.1.1 Modify a worked hours code

Select an hours code from the table above and click the **Modify** button. A form similar to the following should be displayed:

Description:

Payable
 EWTD Worked
 Standard
 Period Reconcile

Report code:

Payment code:

Multiplier:

Colour:

The options on this form are as follows:

Description: an appropriate description of the hours code category.

Payable: whether the employee can be paid for the hours worked.

EWTD Worked: whether the hours worked contribute towards the employee's European Working Time Directive hours.

Standard: whether the hours category is the standard for employees.

Period Reconcile: whether the hours category is included in the overtime reconciliation sequence.

Report code: the code used for the hours category on reports.

Payment code: the code used for the hours category on payslips.

Multiplier: how many times normal pay the employee will receive when working under the hours category. For example, if the employee was to receive double pay, the multiply value would be '2'.

Colour: the colour that the worked hours will appear in hours bands and the absence planner. To modify this colour click on the coloured box to display the following form:



Either select one of the **Basic colours** or define a custom colour by clicking on the button.

8.1.2 Add a worked hours code

Click on the **Add** button on the **Maintain worked hours codes** form. After you have named the new hours category the following form should be displayed:

Maintain Worked Hours Category: NEW

Description:

Payable
 EWTD Worked
 Standard
 Period Reconcile

Report code:

Payment code:

Multiplier:

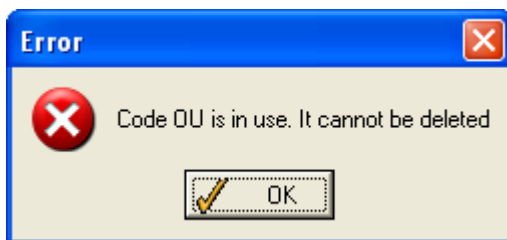
Colour:

OK Cancel

For details of the options on this form see previous section **Modify a worked hours category**.

8.1.3 Delete a worked hours category

Click on the **Delete** button on the **Maintain worked hours codes** form. You will be asked to confirm your decision to delete the hours category. It is possible that the following error message will be displayed:



This means that the hours code is still in use within the system.

8.1.4 Usage button

To see where an hours code is being used within the system, select the appropriate code on the **Maintain worked hours codes** form and then click the **Usage** button. A form similar to the following should be displayed:

Find code use

Drop down list: WORKEDHC

Code: BH

Description: Basic_hours

Employees found

| | |
|--------|-------------|
| 000001 | Anderson T |
| 000002 | Sanderson B |
| 000003 | Anderson C |
| nnnnn4 | Four D |

Used by

Employees

Limited codes

Codes

This form displays whereabouts the hours codes is in use within the system, and which employees are assigned to the hours code. This form is useful if you wish to delete an hours code and wish to know how it is being used within TMS.

8.1.5 Overtime reconciliation sequence

Click on the **Overtime** button on the **Maintain worked hours codes** form. A form similar to the following should be displayed:

Overtime reconciliation sequence

| | |
|-----|-----------------|
| OT1 | Time and a half |
| OT2 | Double time |

OK

Cancel

Help

Drag rows to order overtime rates
Lowest rate at the top, highest at the bottom

This table displays the order in which overtime rates are applied to an employee when overtime is worked. As is explained on the bottom of the form the lowest rate is placed at the top, and the highest rate at the bottom.

8.1.6 Print worked hours code details

To print a report displaying the properties of the worked hours codes, click the **Print** button on the **Maintain worked hours codes** form. You will have the option to print, display, email or generate the report as a PDF.

8.2 Absence hours

Select **Absence hours** from the **Hours categories** sub-menu. A form similar to the following should be displayed:

| Code | Description | Color |
|------|-------------------|-------------|
| A | Authorised abs. | Green |
| B | Bank Holiday | Blue |
| E | Early leaving | Purple |
| H | Holiday | Light Green |
| L | Lateness | Orange |
| S | Sickness - paid | Yellow |
| SU | Sick - unpaid | Cyan |
| U | Unauthorised abs. | Red |
| V | Very Ill | Pink |

This form displays contains all the categories of absence hours codes used on your system, e.g., **A** for Authorised absence, **H** for Holiday.

8.2.1 Modify an absence hours code

Select an hours code from the table above and click the **Modify** button. A form similar to the following should be displayed:

Maintain Absence Hours Category: A

Description:

Payable
 EWTD Full Day Abs.

Counts as work for reconciliation

Report code:

Payment code:

Multiplier:

Colour:

The options on this form are as follows:

Description: an appropriate description of the hours code category.

Payable: whether the employee can be paid for the hours absent.

EWTD Full Days Abs: if this is ticked the absent hours count as an EWTD full day absence and the date range is extended by these days when the EWTD report is produced.

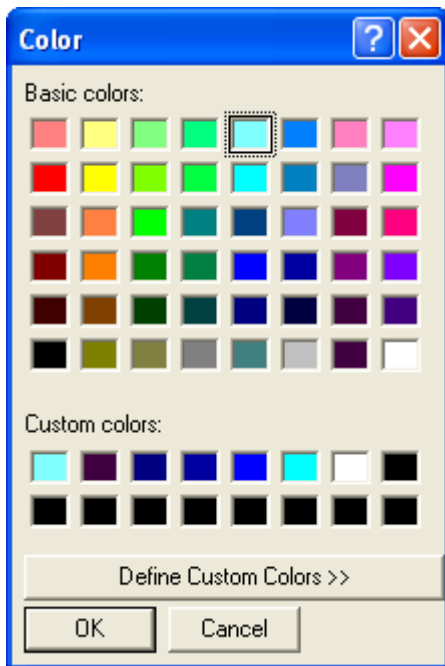
Counts as work for reconciliation: if this is ticked, the absent hours count as standard hours for purpose of reconciliation.

Report code: the code used for the absence hours category on reports.

Payment code: the code used for the absence hours category on payslips.

Multiplier: how many times normal pay the employee will receive when absent. For example, if the employee was to receive double pay, the multiply value would be '2'.

Colour: the colour that the worked hours will appear in hours bands and the absence planner. To modify this colour click on the coloured box to display the following form:



Either select one of the **Basic colours** or define a custom colour by clicking on the button.

8.2.2 Add an absence hours code

Click on the **Add** button on the **Maintain absence hours category** form. After you have named the new hours category the following form should be displayed:

Maintain Absence Hours Category: NEW

Description:

Payable

EWTD Full Day Abs.

Counts as work for reconciliation

Report code:

Payment code:

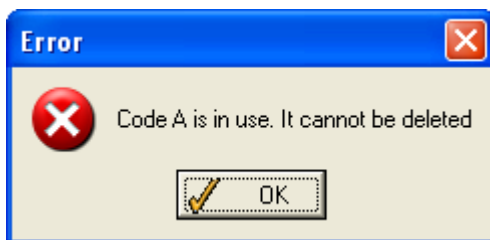
Multiplier:

Colour:

For details of the options on this form see previous section **Modify an absence hours category**.

8.2.3 Delete an absence hours code

Click on the **Delete** button on the **Maintain absence hours category** form. You will be asked to confirm your decision to delete the hours category. It is possible that the following error message will be displayed:



This means that the hours code is still in use within the system.

8.2.4 Usage button

To see where an hours code is being used within the system, select the appropriate code on the **Maintain absence hours category** form and then click the **Usage** button. A form similar to the following should be displayed:

Drop down list: ABSENCEHC

Code: A

Description: Authorised abs.

Employees found

| | |
|--------|-------------|
| 000001 | Anderson T |
| 000002 | Sanderson B |
| 888555 | Sinden T |

Used by

Employees

Limited codes

Codes

This form displays whereabouts the hours codes is in use within the system, and which employees are assigned to the hours code. This form is useful if you wish to delete an hours code and wish to know how it is being used within TMS.

8.2.5 Print absence hours details

To print a report displaying the properties of the absence hours codes, click the **Print** button on the **Maintain Worked Hours Category** form. You will have the option to print, display, email or generate the report as a PDF.

8.3 Additional payments

Select **Additional payments** from the **Hours categories** sub-menu. A form similar to the following should be displayed:

| NEW | New |
|------|------|
| TEST | test |

Modify

Close

Add

Delete

Usage

Print

Display

This table caters for any specialised forms of payment needed within the system.

8.3.1 Modify additional payments

Select an additional payment from the table above and click the **Modify button**. A form similar to the following should be displayed:

The options on this form are as follows:

Description: an appropriate description for the payment

Display: if this option is ticked, the payment is displayed on additional payment grids.

Coded field: this field is only relevant if **Field type** is set to 'Coded field'. It is for the name of the table from where the relevant drop-down is generated.

Payment code: allows you to report on different codes for transfer to external programs.

Field type: specify what type of information is to be stored for the additional payment, e.g. Numeric, Boolean etc.

8.3.2 Add additional payments

Click the **Add** button on **Maintain additional payments** form. After you have named the new hours category the following form should be displayed:

Maintain additional payments category: NEW

Description:

Display

Coded field:

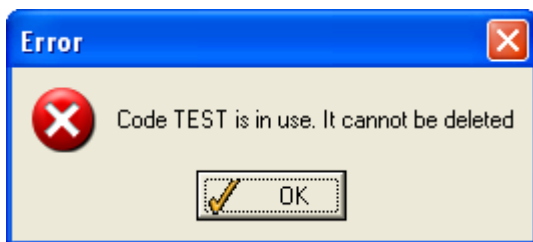
Payment code:

Field type: 0

For details of the options on this form see previous section **Modify additional payments**.

8.3.3 Delete additional payments

Click on the **Delete** button on the **Maintain additional payments** form. You will be asked to confirm your decision to delete the payment. It is possible that the following error message will be displayed:



This means that the payment is still in use within the system.

8.3.4 The Usage button

To see where an additional payment code is being used within the system, select the appropriate code on the **Maintain additional payments** form and then click the **Usage** button. A form similar to the following should be displayed:

Find code use

Drop down list:

Code:

Description:

Employees found

| | |
|--------|------------|
| 000001 | Anderson T |
| 000003 | Anderson C |
| 000009 | Nine I |

Used by

Employees

Limited codes

Codes

Close

Print

This form displays whereabouts the hours codes is in use within the system, and which employees are assigned to the hours code. This form is useful if you wish to delete an hours code and wish to know how it is being used within TMS.

8.3.5 Print additional payment details

To print a report displaying the properties of the additional payment codes, click the **Print** button on the **Maintain additional payments** form. You will have the option to print, display, email or generate the report as a PDF.

8.3.6 Maintain additional payments display sequence

Click the **Display** button on the **Maintain additional payments** form. A form similar to the following should be displayed:

Additional payments display sequence

| | |
|------|------|
| TEST | test |
| NEW | New |

OK

Cancel

Help

Drag rows to order payments

This table shows the order of additional payments in the clock card. You can re-order the payments by clicking on them and then dragging them into place.

9 Entitlements

9.1 View entitlements

To check the value of the employee's entitlements, click the icon:



Entitlements

The form that is displayed looks similar to this:

| 01-Jan-07 to 31-Dec-07 | |
|------------------------|------|
| Days | |
| This year: | 22.0 |
| Carryover: | 0.0 |
| Credit: | 0.0 |
| Total entitlement: | 22.0 |
| Worked: | 0.0 |
| Total available: | 22.0 |
| Already taken: | 2.5 |
| Already planned: | 1.0 |
| Unallocated: | 18.5 |

| Code | Date taken | Hours |
|------|------------|-------|
| H | 05/03/2007 | 7.40 |
| H | 06/03/2007 | 7.40 |
| H | 07/03/2007 | 7.40 |
| H | 07/05/2007 | 9.50 |

| Code | Date earned | Hours |
|------|-------------|-------|
|------|-------------|-------|

Colour Key

- Processed records
- Entitlement used before employee restart

Holiday / Holiday 2 / TOIL

If more than one type of entitlement is allocated to the employee, there will be additional tabs at the bottom of the form which, when clicked, will display details of the other entitlements.

Entitlements may be displayed in either days or hours.

On the left of the form, the **Summary** section of the form lists the following information:

This year - the amount of the entitlement allocated to the employee in the current year.

Carryover - any days or hours that the employee had left over from the previous year, and that are added to the employee's total entitlement.

Credit - any days or hours that were credited to the employee, and added to the total entitlement.

Total entitlement - the values of the three above categories added together, to give the original total for the year.

Worked - the amount of the entitlement earned by the employee (e.g., if an employee who works on a Bank Holiday is granted an extra holiday in the future).

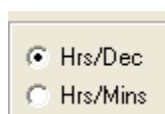
Total available - the value of 'Total entitlement' added to the 'Worked' figure, to give the overall total of the entitlement.

Already taken - the amount of the entitlement that has already been taken by the employee.

Already planned - the amount planned to be used in the future.

Unallocated - the amount left for the employee to use.

Note: it is possible to specify that an employee's entitlements be recorded as hours rather than days. For more details see the **Entitlements** panel of the **Employee Details** form on page 49. If you have chosen to display the employee's entitlements in hours, the following extra option will appear on the above form:



The image shows a small rectangular box containing two radio button options. The first option is 'Hrs/Dec' with a filled-in radio button, indicating it is selected. The second option is 'Hrs/Mins' with an empty radio button.

This option allows you to specify whether to display the entitlements as 'hours in decimal form' or as 'hours and minutes'.

If the **Detail** view on the **Entitlements** form is selected, two tables, 'Absence' and 'Worked', are displayed on the right of the form. The 'Absence' table displays the amount of the entitlement that has already been taken and already planned. The 'Worked' table shows the amount of the entitlement that has been earned. If your company allows employees to work days in lieu (e.g., if working on a Bank Holiday earns the employee an absence to be taken at another date), they will be shown in this table.

The **Dates** view (as seen in the example above) also has two tables, containing more information about the entitlements. The 'Absence' table shows the date and number of hours of each individual day. The days already taken are highlighted in yellow, while those planned for days in the future have a white background. The 'Worked' table displays the same information about the days earned by the employee.

If you wish to alter any aspects of the employee's entitlements, use the **Entitlements** panel of the **Employee details** form (see page 49)

9.2 Year end procedure

This procedure enables the user to re-set all entitlements for the start of a new year, automatically calculating any entitlement to be carried over. The actual year used can vary for each entitlement, and does not have to run for twelve months (its dates will have been set up previously by the system administrator).

To perform the year end procedure, select the **Entitlements** option from the **System** menu on the main toolbar. The following form will be displayed:

Entitlements

Add category Close

Entitlement

Start of current year: 01/01/2007 ...

End of current year: 31/12/2007 ...

Description: Holiday

Warning:

Allow exceed:

Default type: D days

Code: A

Holiday Sickness

Year end

Set codes

Cut-off

Delete

The tabs at the base of the form allow you to select the required entitlement type. When you have done so, click the **Year end** button to display this form:

Process year end for Holiday

Start of new year: 01/01/2008 ...

End of new year: 31/12/2008 ...

OK Cancel

Carryover

None

All

Positive only

Negative only

This option will transfer the employees' "Next year" figure to "This year", clear out any "Credit" value, perform any carryover requested, and set the new entitlement year dates to those shown.

This option should be performed sometime in the new year after all queries relating to the old year have been dealt with. It cannot be repeated or reversed.

This option will not affect those employees with individual entitlement years.

The example above shows the holiday year end procedure, as the year end procedure must be performed separately for each entitlement. The start and end dates of the new processing year are entered automatically, but use the calendar button if they need to be changed.

You must then select a **Carryover** option.

- choose 'None' if you do not want any holiday entitlement to be carried over to the new year;
- select 'All' if you want all types of holiday entitlement to be carried over;

- 'Positive only' will only carry over any entitlement still owing to the employee from the previous year;
- 'Negative only' will only carry over any negative entitlement (i.e. entitlement that has been taken away from the employee).

Click **OK**, and the year end procedure for that particular entitlement will be performed. The system will automatically alter the associated start and end dates on the **Entitlements** form.

Note: It is strongly recommended that you back-up any data as this procedure cannot be reversed.

10 Daily anomaly correction

10.1 Daily anomaly correction

Anomalies occur when employees make clockings in a way that the system regards as irregular. There are various methods for correcting anomalies.

The accurate correction of daily anomalies is very important since this information is used to generate the majority of the management reports (e.g., absence statistics, payroll information, etc.).

There are many different types of anomaly that can occur.

10.1.1 Anomalies that can occur in all systems

- **Overtime** - employee worked some unauthorised hours at a non-standard or overtime rate.
- **Absence** - employee was absent for some or all of the shift.
- **Lateness** - employee arrived late or returned late from a break.
- **Early leaving** - employee left early at the start of the lunch break, or at the end of the shift.
- **Missed clocking** - employee missed one or more clockings.
- **Non-working day** - employee worked on a day they were not expected to.
- **Planned absence** - employee worked when a pre-planned absence had been entered.
- **Call Out** - employee worked outside the shift boundaries.
- **Keyed absence/OT** - employee entered an absence/overtime at clock.
- **Restricted Clock** - employee clocked at a clock they were not supposed to use.
- **Auto-shift change** - an automatic change of shift was made.

10.1.2 Anomalies that can occur in flexitime systems only

- **Minimum Lunch (Flex)** - employee did not clock the minimum break defined.
- **Standard Lunch (Flex)** - employee failed to clock a break and a standard lunch was applied.

10.1.3 Anomalies that can occur in Time Allocation Systems only

- **TAS Transfer** - employee transferred between TAS categories.
- **Missed Transfer** - employee TAS transaction did not occur or was not of the expected type.
- **Incorrect Transfer** - A TAS clocking occurred, but was assigned incorrectly.

These anomalies indicate the reasons why TMS considers a clocking as non-standard, but you still need to discover the real reason for the anomaly (e.g. 'Lateness' may be genuine lateness, or it might be due to a shift change). In some cases you may just need to check an anomaly (e.g. lateness, overtime), while in others you will certainly want to correct it (e.g. changing an absence anomaly to the required code).

As well as the standard anomalies listed above, your system administrator may have set up some custom anomalies, that are only applicable to specific shifts.

10.1.4 Tas anomaly parameters

The parameters concerning TAS anomalies are set up via the **Allowances** button on the **Maintain work rules** form. Note the **TAS variation** field highlighted below:

This allows some acceptable variation in times to be set, as employees will not actually clock into their new department at exactly the time they were expected.

The recommended method for correcting anomalies is to use the **Unchecked anomalies** page (see page 111). This page maintains a list of all new anomalies for each group and allows you to check and correct anomalies.

N.B. TAS anomalies will appear on the list of both the employee's home group and any group to which the employee transferred during their shift. This allows any manager involved to resolve anomalies.

You can use the **Unchecked anomalies** page in conjunction with the **Anomaly report** - a report which lists the anomalies for a particular day (see **Anomaly report**, page 250). This report is optional but it is often useful to pass on to a supervisor who can authorise and explain the anomalies. The anomalies can then be amended as appropriate.

10.2 Unchecked anomalies

This page can be accessed by selecting the following icon:



All outstanding anomalies in the work records of each member of the department during the current period are displayed in the **Outstanding anomalies** form:

Outstanding anomalies (Department: 6)

Period: Current onwards Previous [0]

Sort first by: Employee Date Anomaly Shift

Sort next by: Employee Date Anomaly Shift

Current day anomalies: Absence

Current Employee: Sinden, T
03/05/2007
SHOPDAY
SHOPSAT

6 outstanding anomalies

| Employee | Day | Shift | Clockings | BH | OT1 | OT2 | OU | Reason | Abs Code |
|-------------------------|----------------|---------|--------------------------|------|------|------|------|--------|----------|
| 088888: Tony Kendrick | Tue 17-04-2007 | NORMAL | 09:00, 12:00, 12:30, 15: | 5:30 | 0:00 | 0:00 | 0:00 | | E |
| 088888: Tony Kendrick | Wed 02-05-2007 | FLEXDAY | | 0:00 | 0:00 | 0:00 | 0:00 | | U |
| 888222: Simon Footstool | Wed 02-05-2007 | SHOPDAY | 09:00, 12:00 | 3:00 | 0:00 | 0:00 | 0:00 | | E |
| 888222: Simon Footstool | Thu 03-05-2007 | SHOPDAY | | 0:00 | 0:00 | 0:00 | 0:00 | | U |
| 888555: Tim Sinden | Wed 02-05-2007 | SHOPDAY | 08:00, 14:00 | 6:00 | 0:00 | 0:00 | 0:00 | | E |
| 888555: Tim Sinden | Thu 03-05-2007 | SHOPDAY | | 0:00 | 0:00 | 0:00 | 0:00 | | U |

Some options for authorising anomalies are available within the **Outstanding anomalies** form, while clicking the **Edit** button displays the full **Work record** screen (see below), where all amendments can be performed.

The **Current day anomalies** box at the top shows all anomalies relating to the currently selected day (the day with the white arrow to the left of its row).

To authorise an anomaly that has been created with the correct work record information (e.g., authorising overtime or lateness), simply tick the **Chkd** box on this form. The anomaly will be removed when the list is refreshed.

You should also ensure that this box is ticked after you have made any required amendments to a record, to save the record as checked.

Note: any unchecked work record anomalies which have been escalated will be displayed on the **Outstanding anomalies** form. For a further explanation see **Escalation** on page 312.

10.3 Edit on Outstanding Anomalies form

Shift change:

Change the shift the employee was scheduled to have worked by clicking on the **Shift** column for the anomaly. The arrow button:

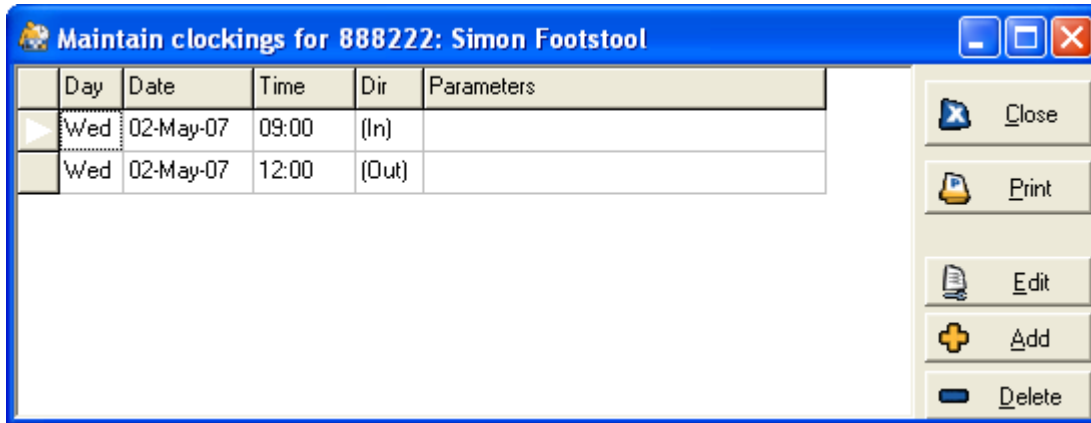


will be revealed, showing that a drop-down list is available. Click the button to display the drop-down list, from which you should select the new shift.

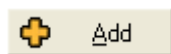
The system will then reprocess this record using the new shift selected. After the reprocessing, other anomalies may have been created which will also need to be dealt with.

Clockings:

To add a new clocking, or to edit or delete an existing clocking, double click within the **Clockings** column for the relevant anomaly, to display the **Maintain clockings** form:



To add a clocking, click the button on the right:



The **Add/Edit clocking** form will be displayed:

There are two **Clocking types** you can add - TMS or TAS.

TMS

Enter the date and time of the clocking, as well as selecting the direction.

The **Hours/Qual** drop-down list allows you to select a keyed absence from the previously defined drop-down list (e.g. company business). You will not normally need to edit any data in this field. See your system administrator for further advice.

If relevant, select the **Site** which was used for the clocking.

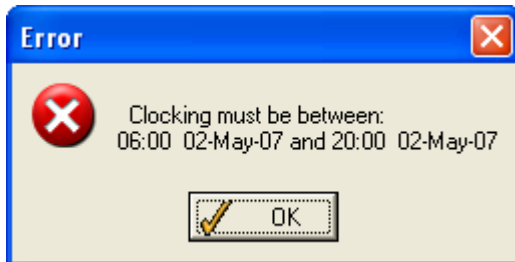
You are also able to enter a latitude and longitude to apply to the clocking.

Click **OK** to add the clocking.

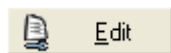
TAS

This should be entered in a similar way to a TMS clocking, although also click the box in the **Parameters** section to fill in additional details, such as the **Project number** associated with the clocking.

Clockings you add must be between the permitted start and end times of the employee's shift for the day. If the clocking is too early or late to fit into the shift pattern, an error message will be displayed, and you must re-enter the clocking details:

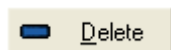


To edit an existing clocking, select the required clocking and click this button:



The **Add/Edit clocking** form will appear, which can be edited in the same way as described above.

To delete a clocking, click on the required clocking, then click this button:



You should confirm the action when prompted.

Hours correction:

To alter an incorrect **number** of hours (worked or absence), type the new figure into each box to replace the incorrect data.

To change the **type** of hours, e.g., from absence to worked, or from overtime to basic hours, either manually enter the correct hours into each column, or drag the hours from the current, incorrect column, and drop them into the correct column. The dropped number will be added to any hours already in the column.

| Employee | Day | Shift | Clockings | BH | OT1 | OT2 | OU | Reason | Abs Code | Hours |
|-----------------------|----------------|--------|-------------------------------|------|------|------|----|--------|----------|-------|
| 088888: Tony Kendrick | Tue 17-04-2007 | NORMAL | 09:00, 12:00, 12:30, 15: 7:15 | 0:00 | 0:00 | 0:00 | | | E | 0:45 |

In the above example, dragging the forty-five minutes of absence into the basic hours column (BH), which already contains seven hours and fifteen minutes, will give the employee eight hours worked at basic hours, and no hours of absence.

The type of absence hours can be altered by clicking in the **Abs Code** column, and selecting a new code from the drop-down list that is revealed. For example, if an employee was off all day, the absence code may originally be for unauthorised absence, but if you know the employee was off sick, change this to the appropriate code, to remove the anomaly.

Reason:

If required, you can enter an explanation for the anomaly into the **Reason** column.

Authorise:

To authorise the amendments you have made, or to authorise an anomaly without changing any data, tick the **Chkd** box.

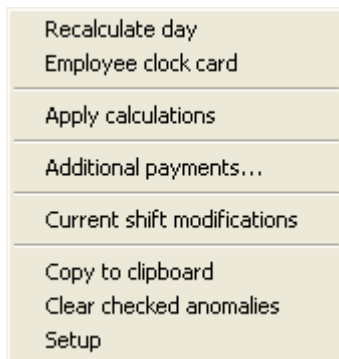
When you have registered an anomaly as checked, you may find it useful to click the following button:



This removes all checked anomalies from the list, allowing you to see more easily which anomalies have yet to be checked.

Recalculate:

If any incorrect modifications have been made to the record, recalculating will return it to its original state. Do this by right clicking the mouse anywhere within the relevant row, to display the following menu:



Select **Recalculate day**, and all amendments will be removed from the record. If you had previously registered the anomaly as 'checked', it will revert to being 'unchecked'.

10.4 Edit on Work Record form

To edit the work record, click on the following button in the **Edit** column next to the appropriate day:



This produces the **Work record** form:

Work record for 000017: Tim Blackmore on Thu 27-Jul-2006

Shift: SHOPDAY (9:00 - 17:00) Office day shift

Other roster: OFFICEDAY Std hours: 7:30

Anomalies: Lateness, Early leaving. Checked

Reason: [Empty text box]

Hours breakdown | Hours Bands | Additional payments | Miscellaneous | Current shift changes

Worked hours

| Code | Description | Hours | Department | Contract | Manager | Location |
|------|---------------|-------|------------|----------|---------|----------|
| BH | Basic & hours | 4:30 | 1 | STP | N | NA |

Absence hours

| Code | Description | Hours | Department | Absence | Manager | Detail | Wkd |
|------|---------------|-------|------------|---------|---------|--------|-----|
| L | Lateness | 0:30 | 1 | 1 | N | | |
| E | Early leaving | 3:00 | 1 | 1 | N | | |

Clockings (Range: 6:00 - 20:00)

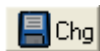
| Time | Dir | Parameters |
|-------|-------|------------|
| 08:30 | (In) | |
| 12:00 | (Out) | |
| 13:00 | (In) | |
| 14:00 | (Out) | |

Buttons: Chg, Edit, OK, Cancel, Range, Help

Some of the following amendments can be performed on the **Outstanding anomalies** page (see above), but this form also includes the more complex amendments to anomalies.

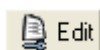
Shift

To change the employee to a different shift for the day, click this button:



and then choose from the drop-down list of pre-defined shifts.

Rather than changing to a new shift, you can amend the details of the existing shift on the **Work shift** page, which is produced by clicking this button:



For a full explanation of how to alter the shift using this form, see **Work shift form**, page 212.

Reason

Record a reason for an anomaly in the day's work record, by entering it into the **Reason** box.

Checked

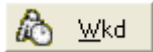
Once all the changes have been made, ensure that the **Checked** box is ticked to record that the day has been manually checked. If you do not wish to alter any details of the anomaly, you can still tick this box to record the day as checked.

Click **OK** to add your changes to the work record. You will be returned to the **Outstanding anomalies** screen, where that day will have a tick to show it has been checked.

N.B. Work records can be set to automatically show as 'Checked' on edit, and you may require a 'Reason' to edit a work record; these options may be enabled in the 'Work record maintenance' pane of the 'General' tab in the system preferences window. There may also be additional settings available via this tab; for further details, please contact your System Administrator.

Absence to Worked

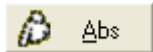
Convert all absence hours to worked hours by clicking the following button:



then selecting the type of worked hours from the drop-down list.

Alter all absence to a single code

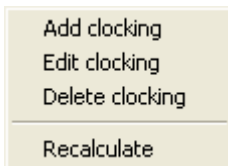
If you have periods of absence with different codes, that you wish to change to a single absence code, click this button:



and select the code you wish to apply to all absence periods.

Clockings

Right-click the mouse anywhere within the **Clockings** box to display the following menu:



To manually enter a clocking for your employee (e.g., when the employee forgot to clock in or out), select **Add clocking**, to produce the **Add/edit clocking** form (see page 113).

To edit an existing clocking, click on the required clocking to ensure it is selected (the selected clocking is that with the arrow to the left of its row), right-click the mouse, and select **Edit clocking** from the menu. The same form will be displayed as that used to add a clocking, and you should edit the inaccurate details.

To delete a clocking, ensure that you have selected the required clocking, right-click the mouse, and select **Delete clocking** from the menu. You will be prompted as to whether you wish to continue. Click **OK** and the clocking will be removed from the work record.

Range button

Click the **Range** button on the work record to display a similar form to the following:

You can use this form to define the time range of the work record. According to the above example, clockings from 6:00 to 20:00 hours on 09/07/2007 will be displayed on the work record.

10.4.1 Hours breakdown tab

Click the **Hours breakdown** tab to display the **Worked hours** and **Absence hours** tables:

To enter new hours, click the **Code** column in the blank row at the bottom of the relevant table, to display a drop-down list. From the list, select a new code (the description will appear automatically), then enter the duration in the **Hours** column.

Edit existing worked or absence hours by clicking the **Code** or **Hours** columns within the existing row, and then altering the details.

Delete a period of hours by clicking the arrow to the left of the incorrect hours:



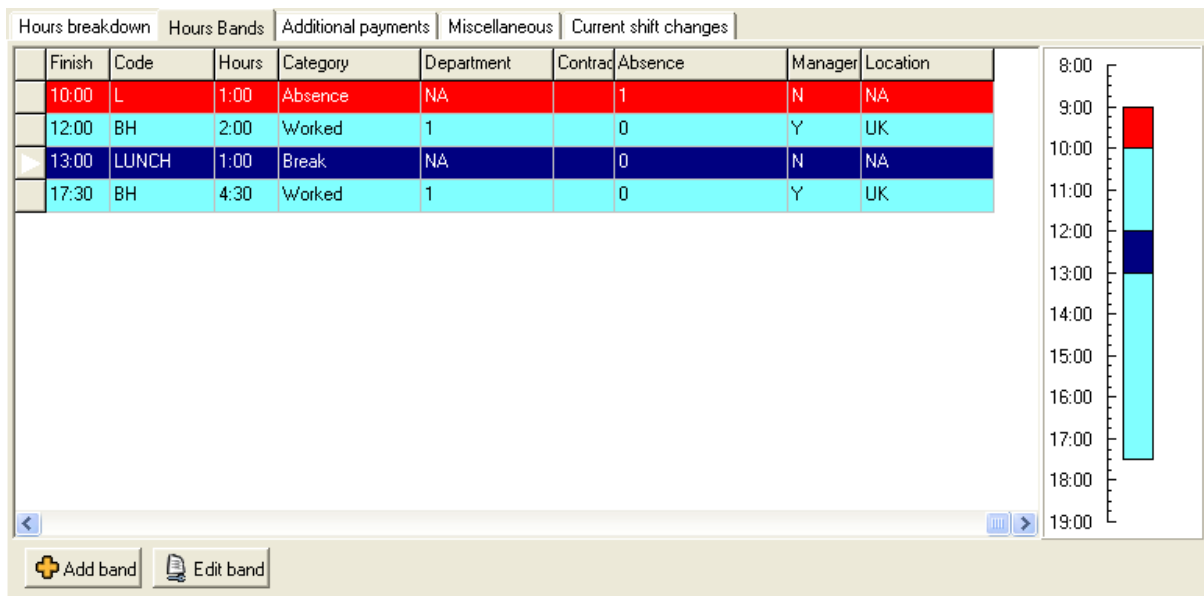
The following box will be displayed:

Select **Delete entry**, and click **OK** to remove the period from the record.

The additional columns in the hours tables relate to TAS categories set up on your system.

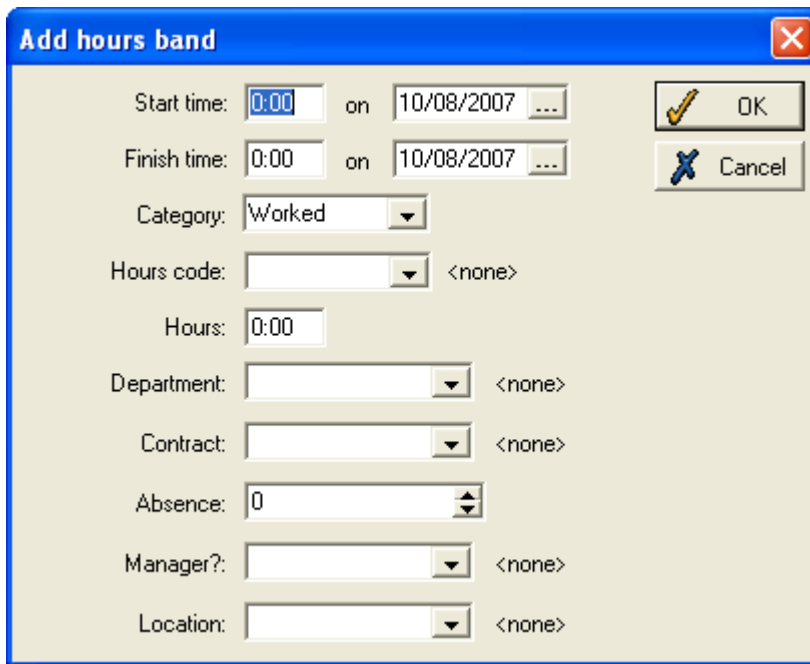
10.4.2 Hours bands tab

Click the **Hours bands** tab to display information similar to the following:



Here you can view a breakdown of an employee's hours for the day. On the right of the panel is a graphic representation of the hours.

To add a new hours band click the **Add band** form and the following form should be displayed:



Fill in the relevant details and then click **OK**.

To edit an existing hours band click the **Edit band** button and make the relevant changes.

Note: for details of how to customise the colours representing the hours bands see Chapter 8 **Hours categories** on page 113.

10.4.3 Additional payments tab

Click on the **Additional payments** tab on the work record to display information similar to the following:

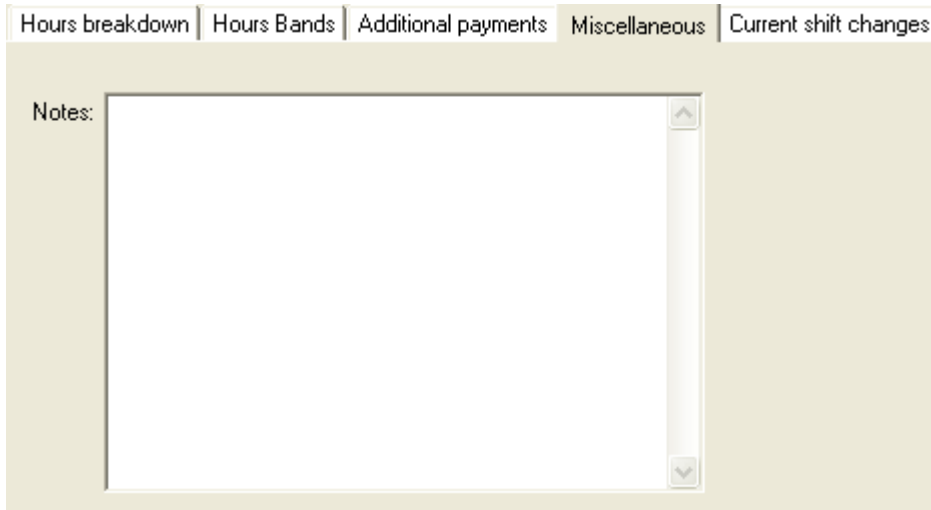
| Hours breakdown | | Hours Bands | Additional payments | Miscellaneous | Current shift changes | | |
|-----------------|----------|-------------|---------------------|---------------|-----------------------|---------|----------|
| | Code | Description | Value | Department | Contract | Manager | Location |
| ▶ | EXPENSES | Expenses | 125.50 | | | N | UK |
| | | | | | | | |

This panel displays any specialised forms of payment received by the employee. For a further explanation see **Additional payments** on page 102.

You can edit any part of this panel by clicking on the appropriate column.

10.4.4 Miscellaneous tab

Click on the **Miscellaneous** tab to display the following panel:



This allows you to record any additional notes alongside the employee's work record for the day.

10.4.5 Current shift changes tab

If you have made changes to a current shift, these changes will be displayed on this panel of the work record. For more details see **Current shift anomalies** on page122.

10.5 Employee clock card

View an individual employee's clockings and work records for a particular week by clicking this icon:



The default clock card is for this week:

| Day | Shift | Clockings | BH | OT1 | OT2 | OU | Reason | Abs Code | Hours | Chkd | Add | Edit |
|----------------|--------|--------------------------|------|------|------|------|--------|----------|-------|--------------------------|-----|------|
| Mon 16-04-2007 | NORMAL | 09:00, 12:00, 12:30, 17: | 8:00 | 0:00 | 0:00 | 0:00 | | | 0:00 | <input type="checkbox"/> | | |
| Tue 17-04-2007 | NORMAL | | 0:00 | 0:00 | 0:00 | 0:00 | | U | 7:30 | <input type="checkbox"/> | | |
| Wed 18-04-2007 | NORMAL | 08:59, 12:00, 12:22, 17: | 8:06 | 0:00 | 0:00 | 0:00 | | | 0:00 | <input type="checkbox"/> | | |
| Thu 19-04-2007 | NORMAL | 08:50, 12:00, 12:30, 15: | 5:40 | 0:00 | 0:00 | 0:00 | | E | 2:00 | <input type="checkbox"/> | | |
| Fri 20-04-2007 | NORMAL | 08:57, 12:00, 12:25, 17: | 8:04 | 0:00 | 0:00 | 0:00 | | | 0:00 | <input type="checkbox"/> | | |

Balance: -7:40

| | | | | | | |
|---------------|-------|------|------|------|-------------|-------|
| Daily totals: | 29:50 | 0:00 | 0:00 | 0:00 | Paid abs: | 0:00 |
| | | | | | Unpaid abs: | 9:30 |
| | | | | | Rostered: | 37:30 |

To look at past weeks, select the required date from the calendar button in the top-left:



You can also use the arrows to change the date, so, to move back a week, click this button:



The clock card contains each clocking made by the employee in the week, and the shift pattern for each day. It also displays the number and the type of hours worked, as well as the number and type of absence hours.

Any days containing unchecked anomalies are highlighted in red.

The **Unassigned clockings** box above the clock card contains any clockings the employee has made that have not yet been processed, and so do not appear on the clock card (usually, this will only apply to clockings made on the current day).

Below the clock card, the totals of each type of worked hours and absence hours are displayed. The **Rostered** box shows the total hours the employee was scheduled to work in the week.

Should you need to make any alterations to the clock card, this can be done in the same way as on the **Unchecked Anomalies** form - either on the clock card itself (see **Edit on Outstanding Anomalies form**, page 112), or by clicking the button that appears in the **Edit** column and using the **Work record** form (see **Edit on Work Record form**, page 115).

10.5.1 Hours breakdown

Right click anywhere in the clock card and select **Setup** from the menu. This will open the **Clock card setup** form. Tick the **Show hours breakdown** option. The hours breakdowns from the work record maintenance screen should now have been reproduced in grids on the main clock card screen as follows:

Changing the row in the main clock card grid will update the data in the bottom grids to the hours for the corresponding day. The grids can be resized by dragging the splitters above each one, and can be sorted by clicking on a column header.

10.5.2 Check for hours change

Right click anywhere in the clock card and select **Setup** from the menu. This will open the **Clock card setup** form. Tick the **Check for hours change** option. If turned on, this setting will warn if the total number of hours for a day have changed during editing. For example, if Monday was selected, and the number of worked hours changed from 7:30 to 8:30, the following warning would be displayed:



Click **Yes** to make the update, or **No** to return focus to that day.

10.6 Current shift anomalies

Normal TMS processing requires that a shift is completed before it can be processed. In reality, this means that the user cannot see the results of the processing until the employee has left work. However, in some circumstances, it is necessary to be able to see this information immediately. For example, you may need to see a list of who is late or absent for the current morning shift. You should have all the morning clockings, so you simply need to check who the system has generated anomalies for.

To allow current shift anomalies to be displayed, tick the **Current shift anomalies** box on the **General** tab of the **Maintain system preferences** form.

When you open the **Unchecked anomalies** page, a highlighted line represents any current shift anomalies, as shown in this example:

| Employee | Day | Shift | Clockings | BH | OT1 | OT2 | OU | Reason | Abs Code | Hours | Chkd |
|-------------------------|----------------|---------|-----------|------|------|------|------|--------|----------|-------|--------------------------|
| 882255: Richard Symonds | Tue 17-04-2007 | NORMAL | | 0:00 | 0:00 | 0:00 | 0:00 | | U | 7:30 | <input type="checkbox"/> |
| 882255: Richard Symonds | Thu 19-04-2007 | NORMAL | | 0:00 | 0:00 | 0:00 | 0:00 | | U | 7:30 | <input type="checkbox"/> |
| 882255: Richard Symonds | Wed 02-05-2007 | FLEXDAY | | 0:00 | 0:00 | 0:00 | 0:00 | | U | 8:00 | <input type="checkbox"/> |
| 882255: Richard Symonds | Thu 03-05-2007 | FLEXDAY | | 0:00 | 0:00 | 0:00 | 0:00 | | U | 8:00 | <input type="checkbox"/> |

The highlighted lines represent the employee's current shift. They are displayed as an unauthorised absence anomaly (the **Abs code** is 'U') because the employee has either not come in to work or has not clocked in.

A current shift anomaly functions differently to anomalies in shifts which have already been processed. Because the current shift has not yet been processed, TMS has to make assumptions about the rest of the shift. For instance, TMS assumes that all of the clockings that are not yet due to be made (such as clocking out at the end of the shift) will be made on time.

The most important thing to realise about current shift anomalies is that if you try to alter any values now (while the shift is still current) these values will override any corresponding values generated as part of the processing.

Outstanding anomalies (Department: 3)

Period: Current onwards Previous

Sort first by: Employee Date Anomaly Shift

Sort next by: Employee Date Anomaly Shift

Current day anomalies: Lateness

Current Employee: Nine, I
02/05/2007
NORMAL
ADMINNIGHT

1 outstanding anomaly

| Employee | Day | Shift | Clockings | BH | OT1 | OT2 | OU | Reason | Abs Code | Hours | Chkd |
|------------------|----------------|--------|----------------------------|------|------|------|------|--------|----------|-------|--------------------------|
| 000009: Ian Nine | Wed 02-05-2007 | NORMAL | 10:00, 12:00, 12:30, 17:00 | 6:30 | 0:00 | 0:00 | 0:00 | | L | 1:00 | <input type="checkbox"/> |

In this example, the employee has clocked in late, so a current shift anomaly is created. Here, 1 hour of absence is generated and 6:30 worked hours.

If you decide to alter the standard hours back to 7:30, the standard figure for the shift, while the shift is still current (maybe you will overlook the lateness), then no matter when the employee clocks during the rest of the shift, the hours code that was changed will remain at 7:30, even after the shift is processed.

If the employee were to leave 30 minutes early, a new anomaly would be raised but the number of standard hours would remain the same:

7:30 standard hours
0:30 early leaving

10.6.1 Edit a current shift anomaly

There may be times when you wish to edit a current shift anomaly (e.g., if the employee has forgotten to clock and you wish to add a clocking). Click the **Edit** button to display a form similar to the following:

000004: David Watson on Fri 17-Aug-2007

Anything entered on this form will overwrite any value calculated later. However, all other data may change when the work record is processed. This may generate additional anomalies.

Hours breakdown | Additional payments | Miscellaneous | Current shift changes

Worked hours

| | Code | Description | Hours | Department | Contract | Manager | Location |
|---|------|---------------|-------|------------|----------|---------|----------|
| ▶ | BH | Basic & hours | 6:30 | 1 | STP | N | NA |
| | | | | | | | |

Absence hours

| | Code | Description | Hours | Department | Absence | Manager | Detail | Wkd |
|---|------|-------------------|-------|------------|---------|---------|--------|-----|
| | L | Lateness | 3:00 | 1 | 1 | | | |
| ▶ | U | Unauthorised abs. | 1:00 | 1 | 0 | | | |
| | | | | | | | | |

Clockings (Range: 6:00 - 6:00)

| | Time | Dir | Parameters |
|---|-------|-------|------------|
| ▶ | 10:00 | In | |
| | 12:00 | Out | |
| | 12:30 | (In) | |
| | 17:00 | (Out) | |

This form is different to the form displayed when you edit a processed shift anomaly because it does not allow you to look at shift details. You are permitted to alter worked or absence hours, and to make amendments to clockings. Make these changes in the same way as for processed shifts (see **Edit on Work Record form**, page 115)

Click **OK** to save any changes you have made.

11 Employee absence

11.1 Employee's planned absence

To add a planned absence for an employee, select **Planned absence** from the **Employee** menu. Choose either **Individual**, for a single absence, or **Repeat**, for an absence repeated at regular intervals.

11.1.1 Individual planned absence

The following form will be displayed, showing all previously planned absences:

| Code | Description | Start | End | Details | Duration (Days) | Duration (Hrs) |
|------|-----------------|------------|------------|---------|-----------------|----------------|
| H | Holiday | 18/08/2006 | 18/08/2006 | ... | | |
| H | Holiday | 23/03/2007 | 23/03/2007 | ... | | |
| B | Bank Holiday | 20/04/2007 | 20/04/2007 | ... | | |
| A | Authorised abs. | 28/08/2007 | 28/08/2007 | ... | 1.00 | 7:24 |
| H | Holiday | 12/09/2007 | 12/09/2007 | ... | 1.00 | 7:24 |
| | | | | | | |

Key: Planned Not rostered Group Past Past group Zero hours

The rows with a shaded background in the above example show absences in the past, while those with a white background are planned for the future.

Duration (Days) and Duration (Hours)

These fields display the length of time (in days or hours) for which an employee will be absent. This allows you to manage your work roster more efficiently at a glance. It also allows you to know if you have booked an absence which is not rostered. This is particularly useful for individuals on rotating shifts.

Add a planned absence:

To add a planned absence for the employee, use the empty row at the bottom of the table. Click in the **Code** column to display a drop-down list of absence types. Select the required type, and the **Description** column will be filled in automatically. Click in the **Start** column to display the calendar button:



which can be used to select the start date of the absence. The end column will then automatically take the same date as the start, to signify a single-day absence. If this is not appropriate, i.e., the absence is for more than one day, change the entry in the **End** column, also using the calendar button.

If the absence is for part of a day, or on a non-rostered day, click the button in the **Details** column, to bring up the **Part day absence** form:

(NB: Part day absences can only be planned for single-day absences.)

Select which part of the shift the employee's absence is planned for. If **Either** is selected, the absence can occur at any point in the day.

When you have selected the part of the day, now choose the duration you wish TMS to record for the absence, in the **How long for** section:

Exact half day - means the employee is to be absent for the full first or second part of the shift.

To/from main break - means the absence is either from the start of the shift to the main break (usually lunch), or from the main break to the end of the shift. This can differ from the **Exact half day** figure, particularly if the main break is not precisely in the middle of the shift.

Hours - select if the absence is for a set length of time, and enter the duration in the box provided. If the employee has more than one shift scheduled for the day, select from the drop-down list which shift the absence is to **Apply to**

Absence on non-working days

If an employee requests to be absent on a day in which they are not expected to work, their absence can now be recorded via the '**Absence each day (non-working days)**' pane. This function is especially useful if you have pool staff employed who have no set pattern of working, or staff operating on a zero-hours contract.

If the employee does not have a roster, or if all the days in a selected holiday period are non-working days, duration of absence in the main form will show as zero. By clicking the 'Hours' radio button, you can now access the '**Absence each day (non-working days)**' pane and manually define the total number of hours associated with each day in the booked absence period, as in the image below:

Absence each day (non-working days)

7:30

Leave as zero if employee is not absent on non-working days

N.B. This option should ONLY be used where there has not been a roster defined for the period.

It is also possible to enter a single period of absence via the clock card and the absence profile; right click within their main forms to produce a pop-up menu:

- Recalculate day
- Insert day
- Merge with next day
- Delete day

- Apply calculations

- Additional payments...
- Change absence period

- Current shift modifications

- Copy to clipboard
- Setup
- Add planned absences

Select **Add planned absences**. A window similar to the following will be displayed:

Add absence for date range

Absence details

Start date: ...

End date: ...

Absence: ▼

Duration: 0:00

These are the hours for each day of the absence and should ONLY be entered if the employee is not rostered for the days selected.

OK

Cancel

After selecting the start and end date, the absence code and the duration, click **OK** to confirm the period of absence. The system will create a period of planned absence which can be viewed identically to any other planned absences. It will also reprocess any past days covered by the new period of absence, and create new work records for that period.

11.1.2 Repeat planned absence

To enter a single-day absence that will be repeated at regular intervals (e.g., weekly training), select **Repeat** and the following form appears:

Multiple Absence

Base absence

Abs Code Holiday

Date ...

Repeat parameters

Repeat every days

Applies for occurrences

Generated absences

| Code | Description | Date | Pt |
|------|-------------|------|----|
| | | | |

Employees to apply absence to

| Ref | Employee Name |
|--------|---------------|
| 225566 | J Dawson |
| | |

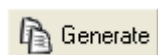
Help OK Cancel

In the **Base absence** section, enter the details of the first absence day in a similar way to entering a single absence (see above). Select the absence type in the **Abs code** box, and select the date for the first absence. If the repeat absence is for part of the day, click the **Edit part day** button.

The **Repeat parameters** section should be used to select how many times, and at what intervals, the absence should be repeated. In the **Repeat every...days** box, select the interval between the absences (e.g., if you are creating a weekly absence, such as every Monday for a number of weeks, enter '7' in this box).

The **Applies for...occurrences** box should contain the total number of occasions the absence is to be taken, including the first instance (so if the employee is to be absent for two consecutive Mondays, enter '2').

When you have entered the details of the absences, click the **Generate** button:



The absences you have planned will appear in the **Generated absences** box below. If the absences displayed are incorrect, amend the details that you entered to create them, and generate again.

The box on the right, **Employees to apply absence to**, displays each selected employee.

Click **OK** to save the repeated planned absence you have created, or **Cancel** to discard the absence.

11.1.3 Delete a planned absence

If an absence is no longer required, it can be deleted, as long as it has not yet been taken. Within the employee's **Planned absences** form, click on the white arrow to the left of the absence to be deleted, and this form will appear:



Select **Delete entry**, and click **OK**, and the absence will be removed.

11.2 Absence profile

This page displays all the absences the selected employee has taken in the past and planned for the future, and allows you to add planned absences for the employee.



Click this icon on the **Employee** toolbar, and a screen like the following appears:

| | S | M | T | W | T | F | S | S | M | T | W | T | F | S | S | M | T | W | T | F | S | S | M | T | W | T | F | S | S | M | | |
|-----|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Jan | | B | H | H | H | H | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Feb | | | | | | | | | E | L | E | E | | | | E | E | L | L | | | | E | L | L | L | E | | | E | E | E |
| Mar | | | | | | | | | E | L | E | E | | | | E | | | | | | | | | | | | | | | | |
| Apr | | | | | | | | | S | | | | | | | | | | | | | | | | | | | | | | | |
| May | | | | | | | | | | | | | | | | | B | | | | | | | | | | | | | | | |
| Jun | | | | | | | | | | H | | | | | | | | | | | | | | | | | | | | | | |
| Jul | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Aug | | | | | | | | | | | S | S | S | | | | | | | | | | | | | | | | | | | |
| Sep | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Oct | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Nov | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Dec | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Should you wish to view a past or future period, select the year using the arrows, and the start-month from the drop-down list, in the highlighted area on the above form.

Make sure the **Show planned absences** box is ticked if you wish the table to display absence periods planned for the future, as well as those already taken.

The different types of absence are marked by their absence codes, and appear in different colours, identified by the key above the table. When the cursor is moved over one of the absence days, a pop-

up box appears displaying the details of the absence. Days with more than one type of absence will show details of each in the pop-up box.

The profile can display all types of absence and/or work, or some categories can be excluded. To add or remove absence or worked hours categories, click the **Absence codes** and **Worked codes** buttons. For an explanation of how to use these forms see **Select available items** on page31.

To add a new planned absence to the profile, simply click on the day the employee is to be absent (this day must be in the future), and the **Planned absences** form will appear, with a new row representing a single-day absence for the selected day. This can be edited in the usual way (see page 125). To enter a multiple-day absence on the profile, click and drag the cursor from the start-date to the end-date of the absence, which produces a Planned absences form for the dates selected. This can then be edited if required.

Click on any past days in the profile if you wish to view the employee's clock card for that week, which shows more details about past absence periods and worked periods. The clock card can be edited in the same way as described in **Unchecked anomalies** (see page 111).

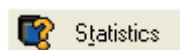
If you need to edit the details of a past absence, right-click on the required absence period to bring up a menu, from which you should select **Change absence period**. The following form is displayed:

| Absence between 08/08/2007 and 10/08/2007 | |
|---|---|
| Code | |
| Absence code | A |
| Department | 1 |
| Absence | 0 |
| Manager? | N |

To select a new absence code, click on the appropriate column to activate a drop-down list; select a new code and then click **OK**. The absence now appears in the profile with its new code. You can also amend the appropriate TAS categories on the above form.

Statistics

To view the employee's absence statistics, click this button:



The following table appears:

| Code | Description | Periods | Sun | Mon | Tue | Wed | Thu | Fri | Sat | Total |
|---------|-----------------|---------|------|-------|-------|-------|-------|-------|------|--------|
| B | Bank Holiday | 3 | 0.00 | 22.80 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 22.80 |
| H | Holiday | 4 | 0.00 | 14.80 | 22.80 | 15.40 | 15.40 | 15.40 | 0.00 | 83.80 |
| E | Early leaving | 14 | 0.00 | 23.75 | 0.75 | 1.00 | 0.50 | 0.50 | 0.00 | 26.50 |
| L | Lateness | 7 | 0.00 | 0.00 | 0.75 | 0.50 | 0.50 | 0.25 | 0.00 | 2.00 |
| S | Sickness - paid | 2 | 0.00 | 7.40 | 0.00 | 7.40 | 7.40 | 7.40 | 0.00 | 29.60 |
| TOTALS: | | 30 | 0.00 | 68.75 | 24.30 | 24.30 | 23.80 | 23.55 | 0.00 | 164.70 |

(The statistics are calculated for the twelve-month period selected for the profile, and only include the absence types that are shown on the profile. Only processed absences are taken into account, and not planned future absences).

The table shows the occurrence of each different type of absence, with the **Periods** column showing the number of absence periods for each type (e.g., a two-week holiday would be treated as one absence period, as would be a single occasion of lateness).

The actual amounts of absence can be calculated either in days or hours (if **Hours** is selected, also choose whether to display hours and minutes or hours and decimals).

To the right of the table, the **Total** column contains the total amount of each type of absence taken by the employee over the course of the year.

The **Totals** row underneath the table shows the total amount of absence taken on each day of the week, with the total amount of absence shown in the bottom-right corner.

11.3 Planned absence for range

11.3.1 Individual absence for range

This function is useful when entering a day such as a Bank Holiday, when all employees may be absent, or a training day which affects a particular group of employees.

Select **Planned absence for range** from the **Mass change** menu, and the following form will appear:

Add a planned absence

When adding a new absence, ensure that the **Add** radio button is selected.

Select the required **Absence code** from the drop-down list, and enter the start and end dates of the absence. Tick the **Part-day abs.** button if applicable, and you will be able to use the same **Part day absence** form used when entering an absence for an individual (see page 125).

If the day's work rules are to be different to those of a normal day, tick the **Make special day** box. You are then able to select a code from the list of all the special days that have previously been set up.

Tick the **Apply to group(s)** box if you wish the planned absence to be automatically added for any employees who join the system in between the current date and the date of the absence, provided they are within the range selected. The absence will also be added to employees who move to new areas of work where the absences may/may not apply.

Click **Apply**, and you will see the **Select range** form, which allows you to select the employees who are to be absent (see page 28). Complete this form, and the planned absence will be added to the system.

If you have selected the **Apply to group(s)** option the following form should be displayed when you click **Apply**:

You are required to select the group type for the absence to be applied to. Click **OK** and the following form should be displayed:

Valid groups can be selected on this form. This list will then be used to apply the **General absences** to the individual employees. In this way new starters and employee who move between different areas in the business will pick up the absences associated with their areas at the time.

Those absences added as group absences, with the box checked, will still appear on the employee's planned absence list where they apply to the employee. However they will be highlighted (blue) and will only be read within this option:

| Code | Description | Start | End | Details | Duration (Days) | Duration (Hrs) |
|------|-----------------|------------|------------|---------|-----------------|----------------|
| H | Holiday | 18/08/2006 | 18/08/2006 | ... | | |
| A | Authorised abs. | 07/08/2007 | 07/08/2007 | ... | | |
| A | Authorised abs. | 21/08/2007 | 21/08/2007 | ... | 1.00 | 7:24 |
| H | Holiday | 21/08/2007 | 21/08/2007 | ... | 1.00 | 7:24 |

Key: Planned Not rostered Group Past Past group Zero hours

In the example above, the bottom row is a general absence included using the new method. This absence is shaded darkly and cannot be edited. The other absences only apply to this employee; the first two are in the past (lightly shaded background) whilst the third is in the future. The checking applied to this list for overlapping absences only takes into account the personal planned absences and does not include any general absences. This checking will be performed later.

Maintain general absences

This option allows you to alter or delete any general absences created through the **Apply to group(s)** function on the **Planned absence for range** form.

Select **Maintain general absence** from the **System** menu. A form similar to the following should be displayed:

| Description | Hours Code | Start Date | End Date | Add/Remove | Absence hours | Selection Criteria | All groups |
|-----------------|------------|------------|------------|------------|---------------|--------------------|------------|
| Authorised abs. | A | 21/08/2007 | 21/08/2007 | A | 0:00 | OD.DEPARTMENT | N |
| Holiday | H | 21/08/2007 | 21/08/2007 | A | 0:00 | OD.DEPARTMENT 1 | N |

Buttons: Close, Modify, Delete, Print

To modify a general absence, click on the appropriate grid in the above table and then click the **Modify** button. A form similar to the following should be displayed:

Predefined absence

Details

Absence code:

Start date: ...

End date: ...

Description:

Department:

Click the **Selection** button to the list of groups for the general absence to be modified if required.

Remove a planned absence

To remove a planned absence that has previously been entered, tick the 'Remove' box instead of 'Add'. Select the same absence code and dates as for the original absence, and click **Apply**.

Then, on the **Select range** form, pick the range of employees to remove the absence from. To remove the absence from all employees, pick the same range as was originally selected when adding the absence.

To remove the planned absence from some employees, while retaining it for others, use this form to select only the employees to be removed. For example, if an absence was originally entered for all, but one department will not be absent, select just this department on the **Select range** form. The absence will still apply to the employees in the other departments.

11.3.2 Repeated absence for range

Select **Repeated planned absence for range** from the **Mass change** menu to enter a regular absence for a range. First select the employees using the **Select range** form (see page 28). You are then taken to the following **Multiple absence** form:

| Ref | Employee Name |
|--------|----------------|
| 000001 | D Hughes |
| 000002 | B Harper |
| 000003 | A Peterson |
| 000004 | D Watson |
| 000005 | E Davies |
| 000006 | J Wordsworth |
| 000007 | G Strauss |
| 000008 | H Mason |
| 000009 | I Nicholas |
| 000011 | K Christophers |
| 000013 | M Wordsworth |

This is the same form as that used for entering a multiple absence for an individual employee. For details, see **Repeat planned absence**, page 127.

11.4 Error messages and warnings

There are two common error messages or warnings which appear when entering planned absences to the system.

Adjust absences for overlap

The following warning may appear when you click **OK** to save your changes to the employee's **Planned absences** form:

This means that one or more of the absence periods that have been entered overlaps with another (either another period that has just been added, or one that was entered previously).

Click **Yes**, and the system will automatically adjust the absences. This means that, if the overlapped period has two different absence codes entered, the most recently entered will be saved.

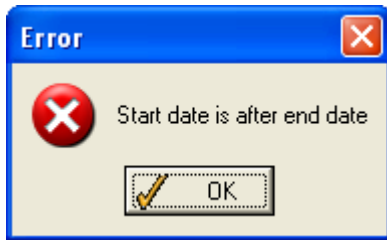
For example, you have previously entered an absence on the 3rd of the month with a code of 'Training'. You now enter an absence from the 3rd to the 5th with a code of 'Holiday'. If you allow the system to adjust the absences automatically, the original 'Training' absence will be cleared, leaving the 'Holiday' period from the 3rd to the 5th.

Click **No**, and you will have to adjust the absences manually. You will not be able to save the form until the overlap has been removed.

NOTE: System administrators can use the system preferences to set certain codes to be 'static', meaning they will not be overwritten in this fashion. For example, Bank Holiday may be a 'static'

absence type in your system. This allows a holiday absence to be entered for a full week in which one day has previously been set as a Bank Holiday, and the Bank Holiday will be retained, with the holiday period applying to all the other days in the week.

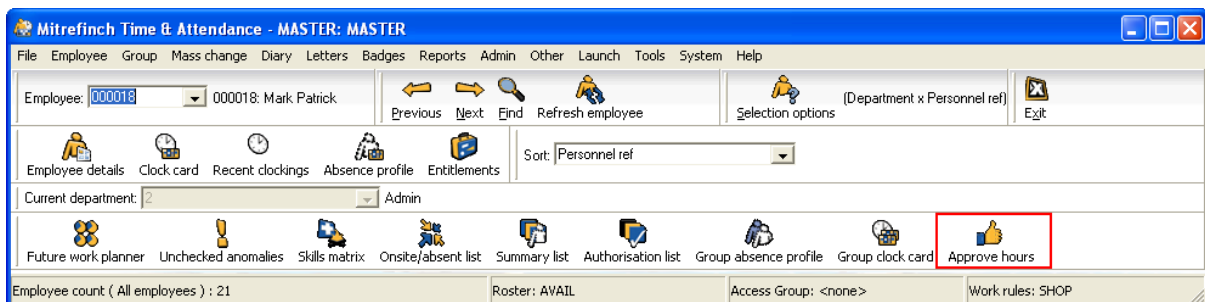
Start date is after end date



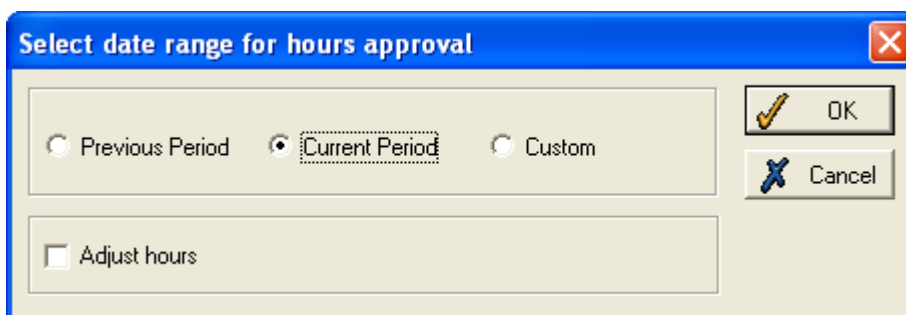
If the end date of the absence period you have entered is after the start date, the absence cannot be saved. Change the absence so that it has the correct details and then save.

11.5 Approve Hours

The **Approve Hours** form allows you to view, edit and approve the hours worked by employees. It also allows for examination of any existing anomalies within an employee's work record and better management of that work record. To access the **Approve Hours** main form, select the **Approve Hours** button on the toolbar of the TMS main screen, as highlighted in the image below:



Once selected, this will display an option to allow you to select the dates for which you wish to view employee's work hours:



The **Previous** and **Current** buttons will load work records in the period range specified in each employee's profile. The **Adjust Hours** tick-box will show the adjusted weekly totals against totals instead of the cumulative hours against employees where this is applicable. The **Custom** option allows you to specify the same date range for every employee:

After the **OK** button is pressed, an extended select screen will be displayed. This allows for a selection of employees, ranging from an individual to an entire department or range of departments:

After a range of employees has been selected, the main approval form will be displayed, similar to the one shown below:

| Employee Name | Start | End | BH | OT2 | OT1 | A | L | Status | Approved |
|----------------------|------------|------------|-------|------|------|------|------|---------------|-------------------------------------|
| 000008: H Mason | 13/03/2006 | 13/03/2006 | 0:00 | 0:00 | 0:00 | 0:00 | 0:00 | 1 outstanding | <input type="checkbox"/> |
| 000013: M Wordsworth | 07/03/2006 | 13/03/2006 | 0:00 | 0:00 | 0:00 | 0:00 | 0:00 | Part approve | <input type="checkbox"/> |
| 000017: T Blackmore | 31/07/2006 | 04/08/2006 | 40:08 | 0:00 | 0:00 | 0:00 | 0:00 | Approved | <input checked="" type="checkbox"/> |

| | BH | OT2 | OT1 | A | L |
|---------|-------|------|------|------|------|
| Totals: | 40:08 | 0:00 | 0:00 | 0:00 | 0:00 |

This screen shows the amount of hours accrued by each employee in each of the selected hours categories. If you wish to change the hours categories that are displayed, this can be done by clicking the **Setup** button on the far right of the form.

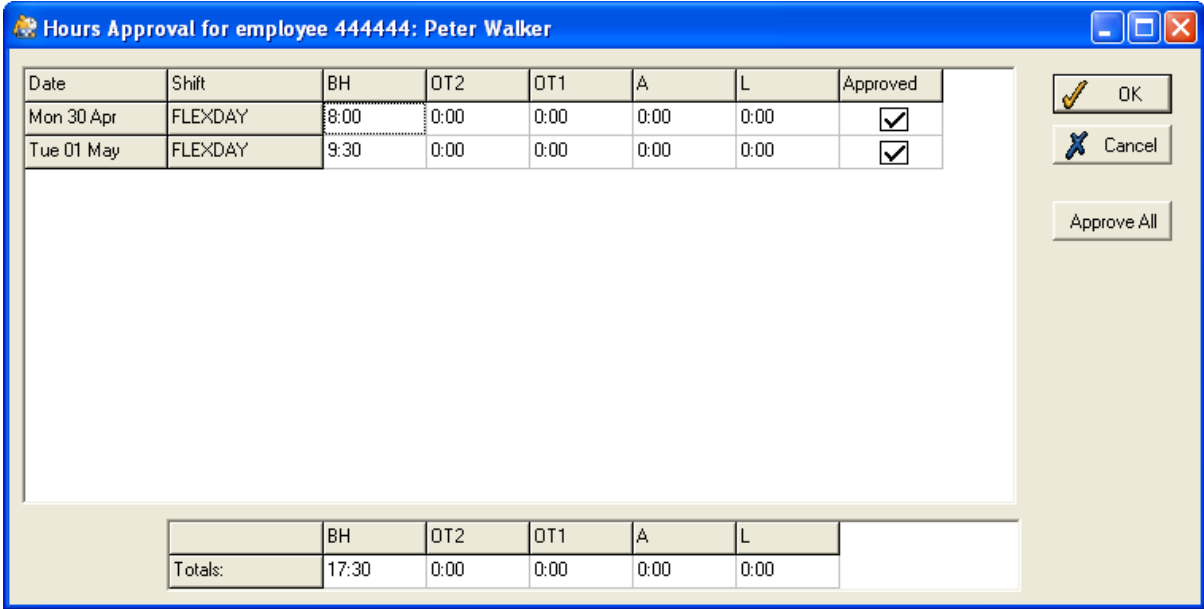
N.B. If a **Setup** button is not being displayed, it is possible that it has been disabled by your system administrator. To see if this is the case, go to the **Approvals** tab of the **System Preferences** form, and tick the **Allow Setup** box.

Each employee line has a status, which will be one of the following:

No Approval (blank space) - None of this employee's work records have been approved. They can be approved by clicking the **Approved** checkbox.

Approved - This employee's work records have all been approved. Once a work record has been approved it is locked and the employee line will appear in the colour specified for approved hours in **System preferences** (see below).

Part Approved - Some of this employee's work records have been approved already. In order to see which records are outstanding, double-click on the relevant employee row to display a screen similar to the following:



Outstanding Anomalies - There are work records in the specified range which have outstanding anomalies. Double clicking the relevant line will show the breakdown for this employee, with anomalies highlighted, as in the image below:

| Date | Shift | BH | OT2 | OT1 | A | L | Approved |
|------------|--------|-------|------|------|------|------|-------------------------------------|
| Mon 16 Apr | NORMAL | 8:00 | 0:00 | 0:00 | 0:00 | 0:00 | <input checked="" type="checkbox"/> |
| Tue 17 Apr | NORMAL | 0:00 | 0:00 | 0:00 | 0:00 | 0:00 | <input type="checkbox"/> |
| Wed 18 Apr | NORMAL | 8:06 | 0:00 | 0:00 | 0:00 | 0:00 | <input checked="" type="checkbox"/> |
| Thu 19 Apr | NORMAL | 0:00 | 0:00 | 0:00 | 0:00 | 0:00 | <input type="checkbox"/> |
| Fri 20 Apr | NORMAL | 8:04 | 0:00 | 0:00 | 0:00 | 0:00 | <input checked="" type="checkbox"/> |
| Totals: | | 24:10 | 0:00 | 0:00 | 0:00 | 0:00 | |

Double-clicking on an anomaly in the hours breakdown will allow you to edit the work record:

| Code | Description | Hours | Department | Contract | Manager | Location |
|------|---------------|-------|------------|----------|---------|----------|
| BH | Basic & hours | 7:22 | 1 | STP | Y | NA |

| Code | Description | Hours | Department | Absence | Manager | Detail | Wkd |
|------|---------------|-------|------------|---------|---------|--------|-----|
| L | Lateness | 0:28 | 1 | 0 | Y | | |
| E | Early leaving | 2:00 | 1 | 0 | Y | | |

| Time | Dir | Parameters |
|-------|-------|------------|
| 05:40 | (In) | |
| 12:32 | (Out) | |
| 13:30 | In | |
| 14:00 | (Out) | |

Once you have returned to the main form and approved the relevant employee hours, the **OK** button can be pressed to make these changes permanent. This will write an audit log for each work record approved, and then lock those work records so that no further alterations can be made.

N.B. If you do need to change a work record after it has been locked, you may unlock it via the **Unlock** button on the Work Record Maintenance screen. At this point an audit log will be created showing that the work record has been unlocked.

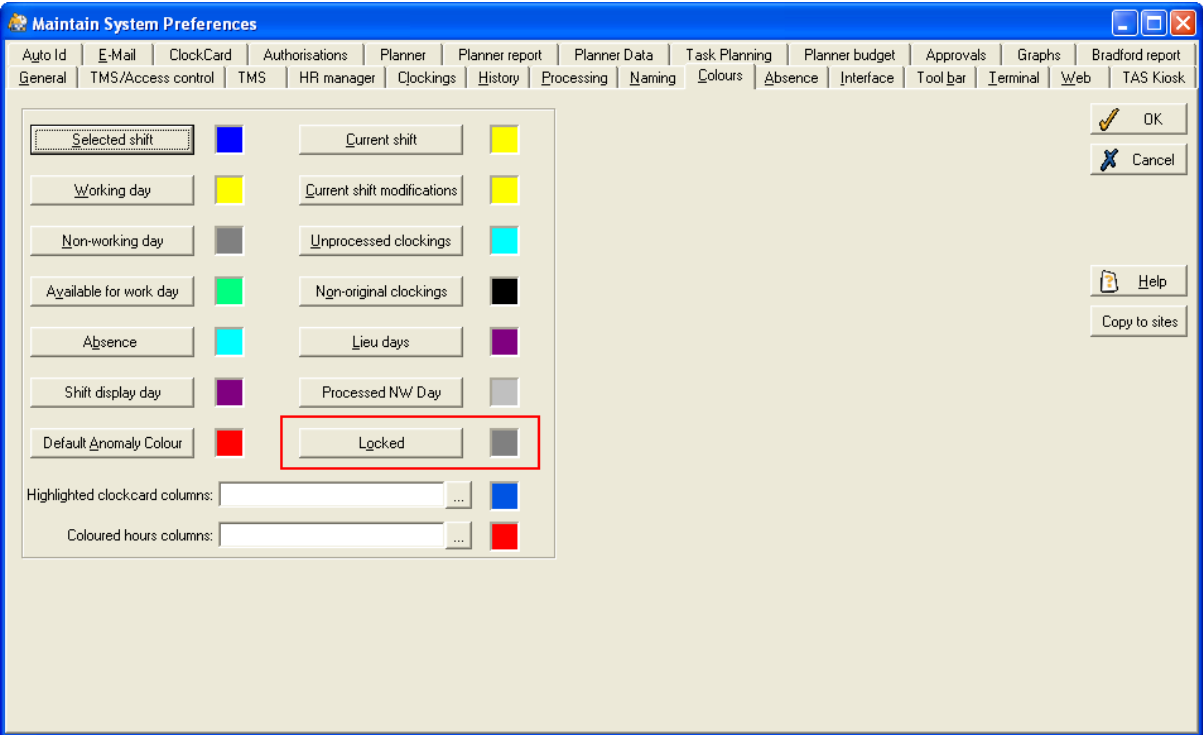
System Preferences

Ticking the **Allow Setup** checkbox in the **Approvals** tab of the System Preferences menu will allow the Setup button to be seen on the main **Hours Approval** form.

If the **Auto-email** option in the **Approvals** tab is ticked, the system will display an email window with an export of the hours that have been approved attached:



The **Locked day colour** button determines the colour of the rows that are marked as 'Approved' in the main Hours Approval form, employee breakdown and clock-card; the button is located in the **Colours** tab of the System Preferences form, as highlighted in the image below:



12 Generate letters

Any HR or Personnel department will know how important it is to have a facility that allows for the automatic generation of letters for all or a range of employees.

Using WinTMS, you can generate letters from pre-defined templates. These templates are usually set up by the system administrator, meaning that all you have to do is to select which employees the letters should be generated for. Letters can be generated for individual employees, or for any required range of employees.

The letters can be printed or emailed, and a copy can be kept on the system as well.

Note: the letters function will only appear in WinTMS if:

1. You have a license for HR Manager
2. You have a WinTMS license with 'Letters' specified.

If you have the letters option due to option 1 then it will only display for HR employees. If it is due to option 2 then TMS and HR employees will be available.

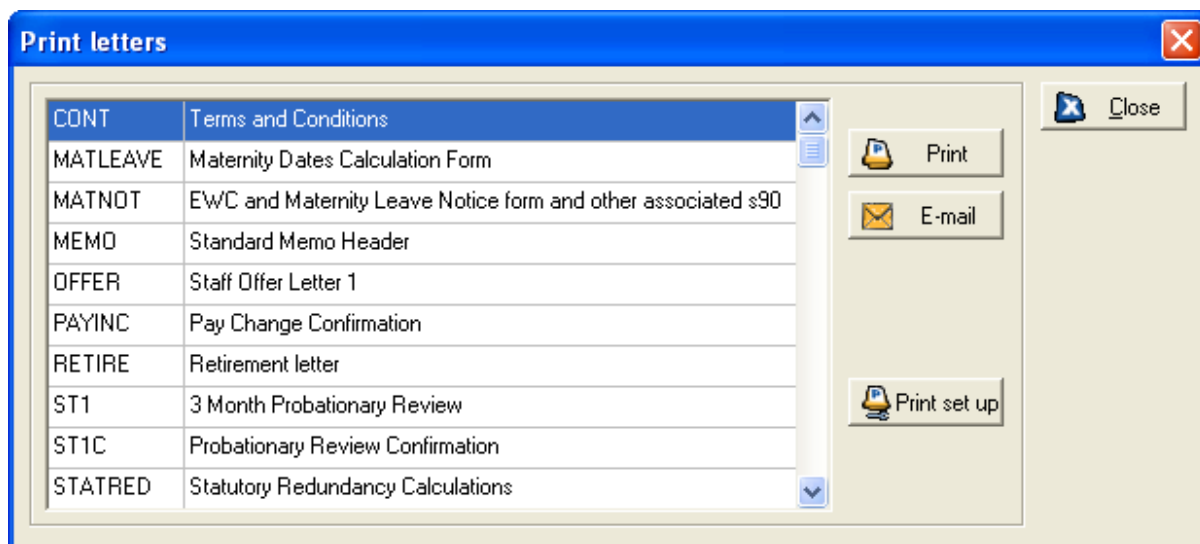
12.1 Print letters

When printing letters, use the **Print set up** button to make sure that the letter will be printed to the correct printer, and that the settings are as required.

12.1.1 Print a letter for a single employee

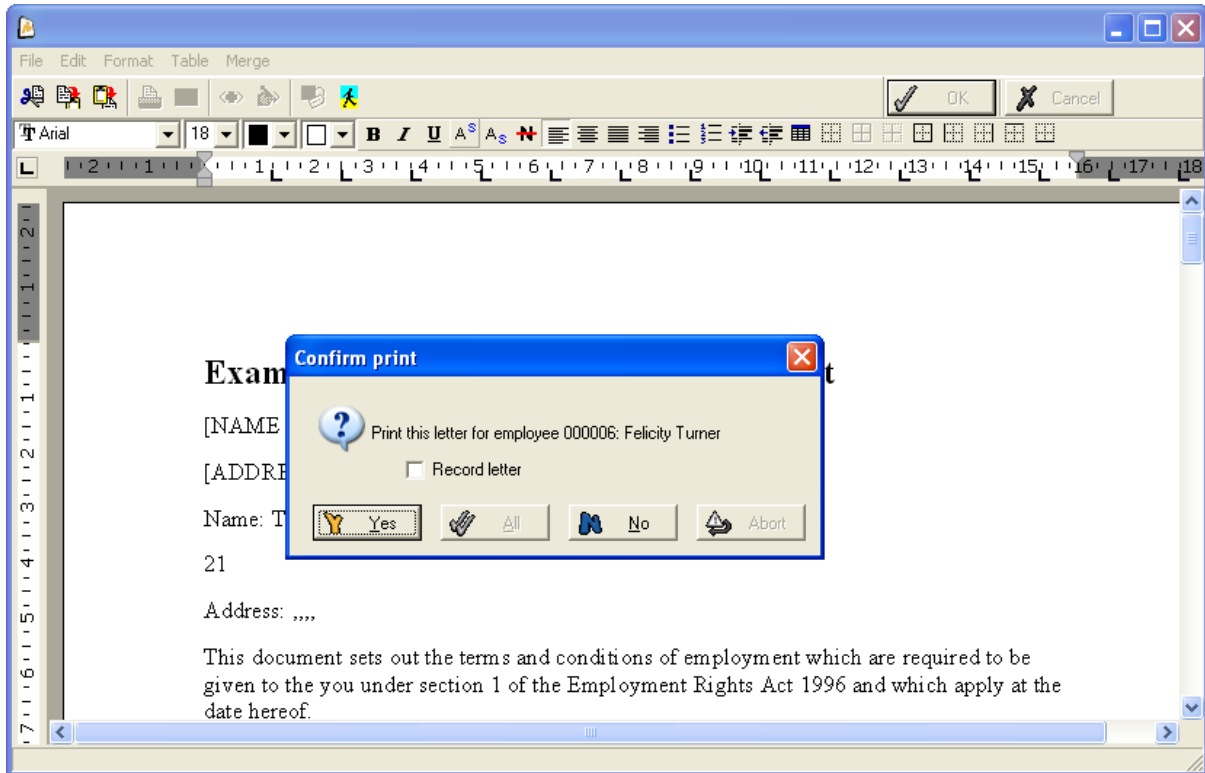
First, ensure the relevant employee is selected in the **Employee** drop-down list.

Select **Single letter** from the **Letters** menu. A table like this is displayed:



Select the required letter and click **Print**.

The system searches the system for the selected employee's details and inserts the relevant information (name, address etc.) into the letter. The relevant letter will then be displayed so it can be checked.



If necessary, the letter can be modified at this point. Move the **Confirm print** box out of the way and make any necessary changes.

Before you print the letter, choose whether or not the letter should be recorded. If you tick the **Record letter** box, the letter will be saved to the employee's **Files** page (see page 53 for details).

Now click **Yes** to print the letter.

A pop-up box informs you when the process is finished.

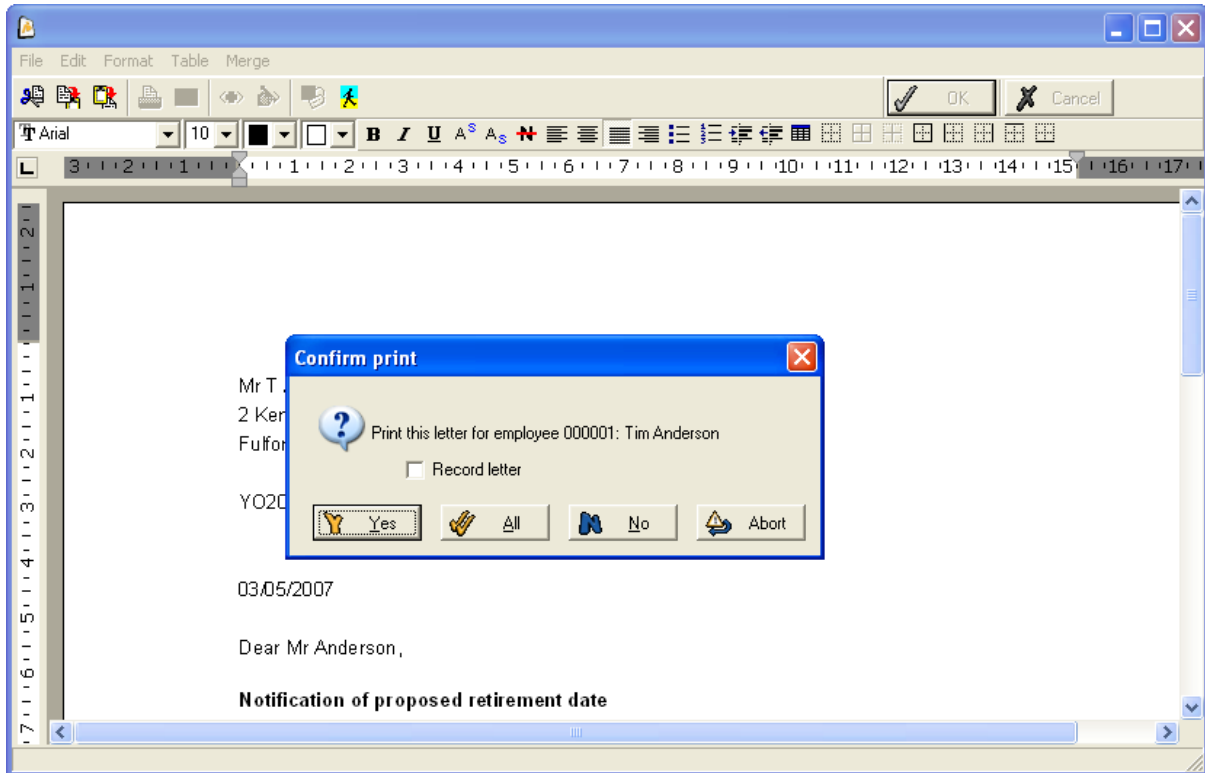
12.1.2 Print a letter for a range of employees

Select **Print letters** from the **Letters** menu and you will see the same **Print letters** form as used for printing a single letter (see above). Select the required letter and click **Print**.

The **Select range** form will be displayed, allowing you to choose which employees the letter should be generated for (for details, see **Select range**, page 28).

NB: Some letters may have additional selection criteria set up within the template (e.g., the letter may have been set up to be sent to any employee over the age of 30, or may only be sent to current employees). When you select the range, HR Manager will check through all employees within this range and only create a letter for those who match the selection criteria.

Once the required range has been defined, the letter will be displayed for the first employee in the range and a box will appear with a number of options:



Move the box out of the way if the letter needs to be amended in any way.

As with printing a single letter, ticking the **Record letter** box retains a copy in the employee's **Files** section (see page 53). There are four buttons on the form:

- **Yes** - if you click this, the letter will be printed for this employee, and then the letter for the next employee in the range will be displayed, with the same **Confirm print** box. This allows you to check individual letters before printing.
- **All** - click this and the letter will be printed for this employee and for all other employees in the range without the **Confirm print** box being displayed again for the other employees.
- **No** - click this if you do not want to print the letter for this employee. The letter for the next employee in the range will then be displayed, with the same **Confirm print** box.
- **Abort** - click this if you do not want to print the letter for this employee, or any other employee, as you will return to the **Print letters** table.

12.2 Email letters

Note: You can only use this function if your system uses Microsoft Outlook or Outlook Express.

12.2.1 Email a letter for a single employee

First, ensure you have selected the required employee on the **Employee** drop-down list.

Select **Single letter** from the **Letters** menu. The same **Print letters** table appears as that used for printing letters. Select the letter you wish to send and click on the **Email** button. The selected letter will appear, together with this form:

You can check the letter before sending, and make any amendments if necessary.

If you tick the **Record letter** box, a copy of the letter will be saved to the employee's **Files** page (see page 53 for details).

Depending on your settings, the employee's email details will be entered automatically, although this can be changed if necessary. The letter will be sent as an attachment with the email, and you can enter a message to accompany the document, if you wish.

Click **Yes** to send the email, or **No** to cancel and return to the **Print letters** table.

12.2.2 Email a letter to a range of employees

Select **Print Letters** from the **Letters** menu. Select the required letter, and click on the **Email** button. You will then see the **Select range** form, which should be used to select the employees to receive the email (see page 28 for details).

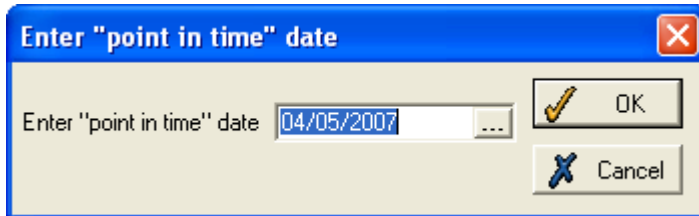
You will see the **Confirm e-mail** box, which works in the same way as for emailing a letter to a single employee (see above), except there are four buttons at the bottom of the form:

- **Yes** - if you click this, the letter will be emailed to this employee, and then the letter for the next employee in the range will be displayed, with the same **Confirm e-mail** box. This allows you to check individual letters before sending.
- **Yes to all** - click this and the letter will be sent to this employee and all other employees in the range without the **Confirm e-mail** box being displayed again for the other employees.
- **No** - click this if you do not want to send the letter to this employee. The letter for the next employee in the range will then be displayed, with the same **Confirm e-mail** box.
- **Abort** - click this if you do not want to email the letter to this employee, or any other employee, as you will return to the **Print letters** table.

12.3 Point in time letters

Some letters may have been set up to display information for a particular point in time (i.e. historical or future information can be used in the letter instead of current data). For example, you may wish to run off letters today which are not due to be sent out until the following week.

If, when you click on **Print**, this form is displayed, you are printing a 'point in time' letter.

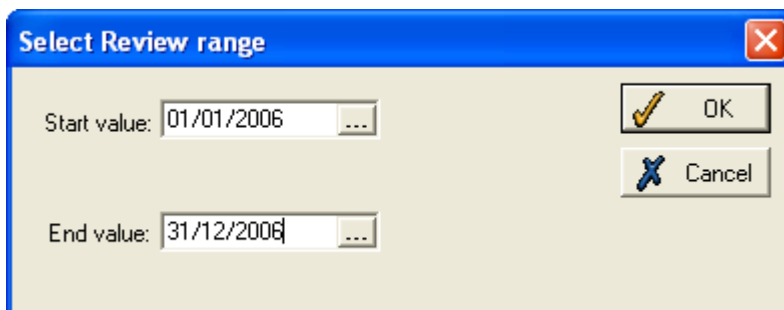


Select the required date and click **OK**.

Now print the letter as normal.

12.4 Letters referring to multi-line records

Some letters may have been set up to display information from multi-line fields (e.g., Qualifications). After you have selected the range of employees, a prompt like this appears:



In this case, employees will be selected based on the date they gained a qualification. You must simply select the **Start value** of the range, and the **End value** of the range. This letter will be sent to all employees who were awarded a qualification in 2006.

When the required range has been selected, click **OK** and then proceed in the normal way.

13 Diary

13.1 Maintain diary

The diary function on the system is a reminder system, which can be set up to display messages at relevant times. Your system administrator will have set up diary definitions, which generate diary entries automatically. These will remind managers when an employee is due an appraisal, long service award, pay rise or other appropriate event. Any other messages can be entered manually, and will function in the same way.

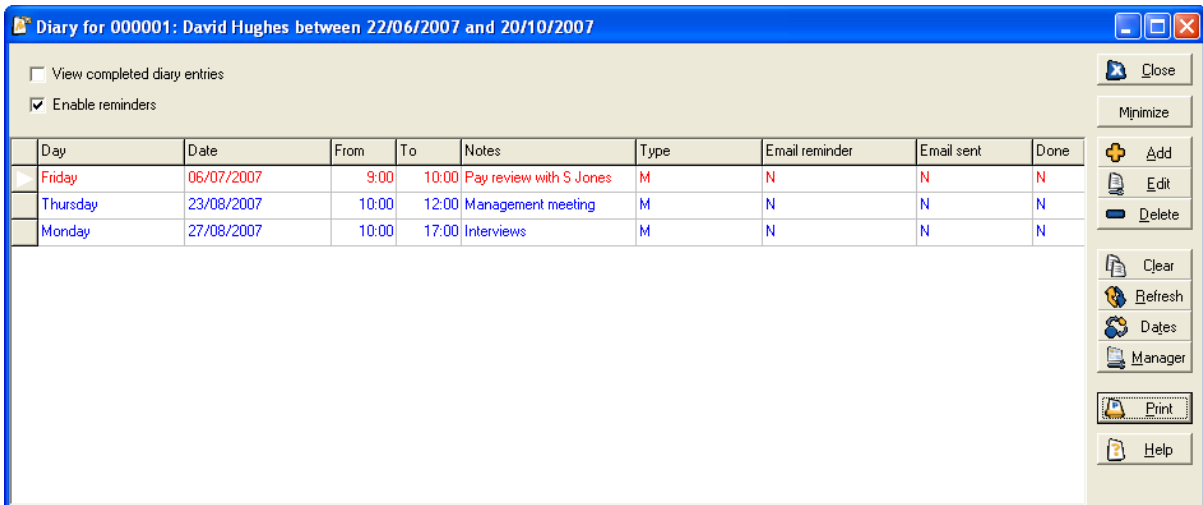
Usually, most managers in an organisation will have a diary, as may supervisors, department coordinators and similar. The system administrator will have decided whose diaries you are allowed to access.

Note: the diary function will only appear in WinTMS if:

1. You have a license for HR Manager
2. You have a WinTMS license with 'Diary' specified.

If you have the diary option due to option 1 then it will only display for HR employees. If it is due to option 2 then TMS and HR employees will be available.

To view a diary, select **Maintain diary** from the **Diary** menu. A **Select manager** table will appear, listing all the managers whose diaries you are entitled to access. Select the required manager and a form like this is displayed:



Each row shows a separate diary entry. The entries are colour-coded according to whether the action is dated for a past day, today, or a day in the future.

The diary will only display entries within the period set in the **System preferences**. By default, this includes 60 days in the past and 60 days in the future. To change the dates between which diary entries are shown, click the **Dates** button to show this form:

Select the required start and end dates, and click **OK**. The selected date range is shown on the title bar of the form.

If the **View completed diary entries** box is ticked, the diary will display completed and uncompleted entries. If it is not ticked, only those that have not yet been completed will be shown.

When **Enable reminders** is selected, a pop-up box will automatically inform you at the time when a diary entry is due, or if an entry has become overdue.

To view a different manager's diary, click the **Manager** button. You can then select from all the managers whose diaries are accessible to you.

13.1.1 Diary entries

Each diary entry contains the following information:

- **Date** - this is when the entry has been set to inform you of a pending event. For example, if you have asked to be reminded of pending retirements, the diary entry may be a month before the actual retirement date, allowing you to take the necessary action.
- **Time** - not entered for automatic diary entries, but can be entered manually if required. If no time is entered, you will be reminded whenever you open the diary on the correct date.
- **Notes** - this is the message generated for the automatic diary entry. For manual entries, you can write a message in this box.
- **Type** - the code is shown for the relevant type of diary entry.
- **Done** - whether or not the entry has been completed.

To update or amend an entry, click the **Edit** button. The entry will be displayed like this:

To record that a diary entry has been completed, change the entry in the **Done** box to **Yes**. On clicking **OK**, the entry will be registered as done, meaning that if **View completed diary entries** is not ticked, the entry will no longer appear on the screen.

If necessary, you can edit any other details of the diary entry on the above form.

To add a manual diary entry, click **Add**, and enter the required details on the same form as shown for editing an entry.

13.1.2 Synchronize with Outlook

Depending on your settings, the diary may have a **Synchronize with Outlook** button. This feature allows all diary entries to be replicated in the Tasks section of the manager's Microsoft Outlook account. The manager can then deal with tasks in a manner which may be more familiar. However, completing tasks in Outlook does not set them as 'done' in the system, so if Outlook is used as the main reminder system, you may wish to set all tasks as 'done' in the system as soon as they are synchronised with Outlook, to avoid duplicating effort later.

13.1.3 Clear entries

NB: Entries cannot be viewed again once deleted. However, the diary entry is still held in the database until it is old enough to be deleted by Autotask.

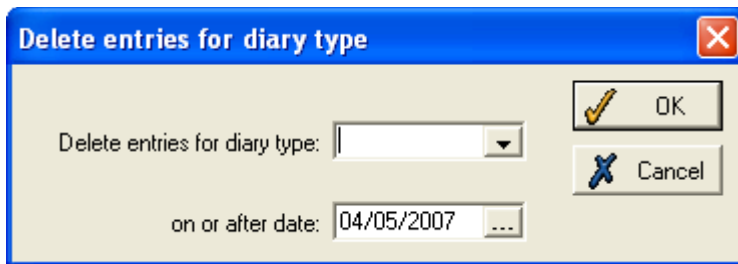
To delete a diary entry, select the entry and click the **Delete** button. Then confirm when prompted.

Alternatively, you can delete all entries before a certain date. Click the **Clear** button to display this box:

Select the required date and click **OK**. All entries in this manager's diary, prior to the selected date, will be deleted.

13.2 Delete diary entries

To clear the diary of all entries of a particular type, select **Delete diary entries** from the **Diary** menu. You will see the following form:



The screenshot shows a dialog box titled "Delete entries for diary type". It features a blue header bar with a close button (X) in the top right corner. The main area is light beige and contains two input fields. The first is a label "Delete entries for diary type:" followed by a dropdown menu. The second is a label "on or after date:" followed by a text box containing the date "04/05/2007" and a date picker icon (three dots). To the right of these fields are two buttons: "OK" with a pencil icon and "Cancel" with a blue X icon.

This form allows you to delete all diary entries of a certain type after a certain date. Doing this allows the entries to be properly replaced, whereas simply marking the entries as 'Done' will only remove the entries from view, not allowing them to be overwritten.

This function might be used if you are deleting a type (definition) of diary entry that is no longer needed. The deleted diary entries will be regenerated by Autotask if no changes are made to the diary definition.

Use the drop-down list to select the type of entry you wish to delete, and enter the date after which entries of this type should be deleted.

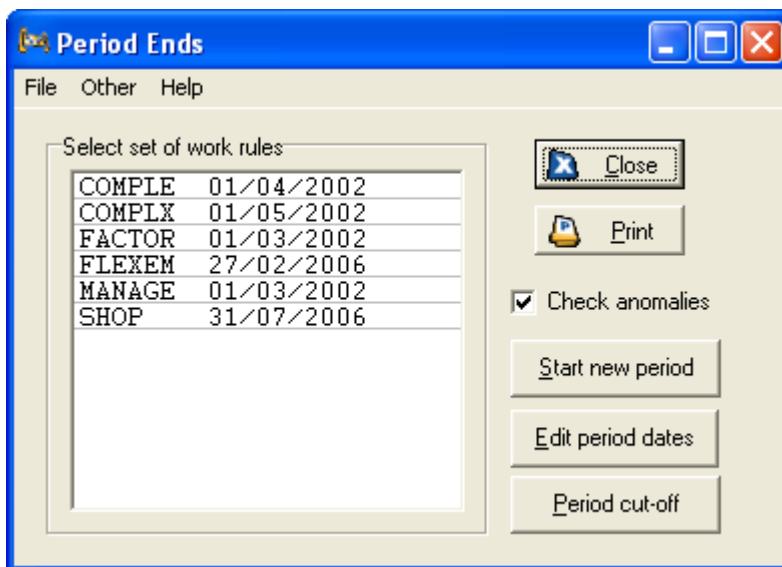
Then click the **Delete** button, and confirm when prompted that you wish to complete the action. All diaries will be cleared of this type of entry from the given date.

14 Period ends

In order to give information on screen regarding hours worked in the current pay period, flextime balances and recent anomalies, TMS maintains a series of dates indicating the start of the previous and current pay periods, and the expected start date of the next period. These dates are also used by reports.

The system will only be able to make use of these dates if it has been informed, something which must be done manually. It is advisable to update the period end dates before employee information is sent to the payroll. All sets of work rules, or employee profiles, use separate dates, so must be updated individually.

To view and make any changes to period dates, select **Period ends** from the **Admin** menu, to produce this table:



The screenshot shows a window titled "Period Ends" with a menu bar (File, Other, Help). It contains a table with the following data:

| Select set of work rules | |
|--------------------------|------------|
| COMPLE | 01/04/2002 |
| COMPLX | 01/05/2002 |
| FACTOR | 01/03/2002 |
| FLEXEM | 27/02/2006 |
| MANAGE | 01/03/2002 |
| SHOP | 31/07/2006 |

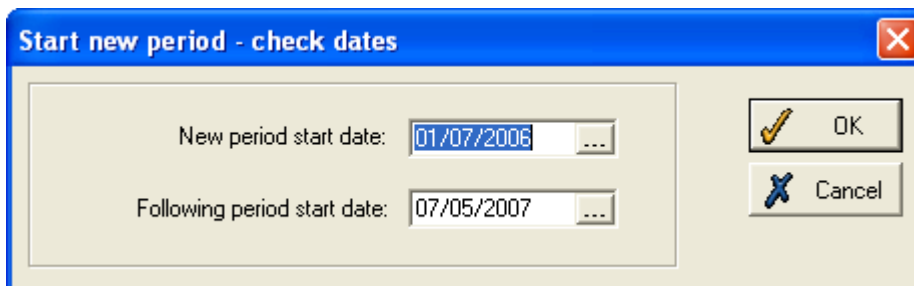
Below the table are several controls: a "Close" button, a "Print" button, a checked checkbox for "Check anomalies", and three buttons: "Start new period", "Edit period dates", and "Period cut-off".

Your form will display a list of the profiles (sets of work rules) that will have been set up previously by the system administrator. The date relating to each set of work rules is the start date of the current period.

14.1 Start a new period

When starting a new period, first choose whether or not to tick the **Check anomalies** box. If ticked, you will be informed, before the period end procedure is completed, if the period has anomalies remaining for employees on the selected work rules. You will then be able to deal with the anomalies prior to completing the period end process.

To start a new period, select the required profile and then click the **Start new period** button. This form will be displayed:



The screenshot shows a dialog box titled "Start new period - check dates". It contains two date input fields:

- New period start date: 01/07/2006
- Following period start date: 07/05/2007

On the right side, there are two buttons: "OK" and "Cancel".

If the start dates entered automatically for the new and following periods are incorrect, replace them with the correct dates. Click **OK** to start the new period. If the dates entered are invalid (e.g., the start date for the following period is before that for the new period, or the start date for the new period is in the future) an error message will be displayed, and you must correct the dates.

The system will now update the period ends. If any anomalies are found (and you have ticked the **Check anomalies** box), a warning message will be displayed like this one:



Click **No** if you wish to continue the update anyway. However, if you do not want to continue with the update while the period contains anomalies, click **Yes** to abort, and then check the anomalies in the usual way (see **Unchecked anomalies**, page 111, for details), before returning to the **Period ends** function later.

14.2 Edit period dates

If the dates for the current or previous pay period are incorrect, you can correct them on the same **Period ends** form as used for starting a new period (see above). Select the required profile, and then click the **Edit period dates** button. The following form appears, showing the start dates of the previous, next and current periods:

Use the calendars to change the start dates for the previous, current or next periods. Click **OK** to save the new dates.

14.3 Period cut-off

Select a work rule and then click the **Period cut-off** button to display a form similar to the following:

This option allows you to allow or disallow modifications to the data for the previous pay periods. For example, if you choose to **Stop modifications to previous period data**, users without access to the **Period ends** option will be prevented from making amendments to the previous pay period.

15 Overtime reconciliation

Overtime reconciliation is used to enable any overtime worked by employees to count as normal hours if they have worked insufficient normal hours in the period. For example, if an employee is scheduled to work a 37 hour week, but actually worked 35 normal hours and two overtime hours, TMS can be set up to automatically adjust the hours - the two overtime hours will make up the two lost normal hours, and will therefore be paid at the normal rate.

The hours categories to be automatically reconciled by TMS will have been set up previously. Contact your system administrator for details as to whether your system is set up to allow overtime reconciliation.

Reconciled hours appear in two areas of TMS - on an employee's clock card, and on certain reports that use the WRADJ function (see the **TMS Report Writer User Guide** for details).

15.1 Overtime reconciliation on employee clock card

On the clock card, the reconciled hours are highlighted at the bottom of the form as **Adjusted hours**. An example of a clock card with adjusted hours is as follows:

Display dates: 31/07/2006 to 06/08/2006

Current anomalies: <none>

Unassigned clockings: Fri 16-Mar-2007 09:00, Fri 16-Mar-2007 12:00, Fri 16-Mar-2007 12:29

| Day | Shift | Clockings | BH | OT1 | OT2 | OU | Reason | Abs Code | Hours | Daily | Run | Chkd | Add | Edit |
|----------------|---------|--------------------------|------|------|------|------|--------|----------|-------|-------|------|--------------------------|-----|------|
| Mon 31-07-2006 | SHOPDAY | 09:00, 12:00, 12:30, 17: | 8:00 | 0:00 | 0:00 | 0:00 | | | 0:00 | 0:30 | 0:00 | <input type="checkbox"/> | | |
| Tue 01-08-2006 | SHOPDAY | 09:00, 12:00, 12:30, 17: | 8:00 | 0:00 | 0:00 | 0:00 | | | 0:00 | 0:30 | 0:00 | <input type="checkbox"/> | | |
| Wed 02-08-2006 | SHOPDAY | 09:00, 12:00, 12:30, 17: | 8:08 | 0:00 | 0:00 | 0:00 | | | 0:00 | 0:38 | 0:00 | <input type="checkbox"/> | | |
| Thu 03-08-2006 | SHOPDAY | 09:00, 12:00, 12:30, 17: | 8:00 | 0:00 | 0:00 | 0:00 | | | 0:00 | 0:30 | 0:00 | <input type="checkbox"/> | | |
| Fri 04-08-2006 | SHOPDAY | 09:00, 12:00, 12:30, 17: | 8:00 | 0:00 | 0:00 | 0:00 | | | 0:00 | 0:30 | 0:00 | <input type="checkbox"/> | | |

| | | | | | | | |
|------------------|-------|------|------|------|--|-------------|-------|
| Daily totals: | 40:08 | 0:00 | 0:00 | 0:00 | | Paid abs: | 0:00 |
| Adjusted totals: | 37:30 | 0:00 | 2:38 | 0:00 | | Unpaid abs: | 0:00 |
| | | | | | | Rostered: | 37:30 |

Worked hours for Mon 31-07-2006

On the above example, the employee has been credited with working 40 hours and 8 minutes in the week. However, he was only rostered to work 37 hours and 30 minutes. The **Adjusted totals** row shows that his overtime has been amended to **OT2**, double time, because it was outside of his standard shift.

N.B. There is a flag to indicate if an absence code counts as work for purposes of reconciliation. It is altered via a check-box on the **Modify Absence Hours** screen, found via **Hours Categories** in the **System** menu. This flag is automatically set to be the value of the **Paid** flag.

16 Future Work Planner

To view the future work planner, either select the option from the **Group** menu, or click this icon on the **Group** toolbar:



The future work planner always opens on the planner tab, showing details of the selected department's shifts for the current week.

There are up to five panels on the future work planner, which you can switch between by clicking the tabs at the bottom of the form:

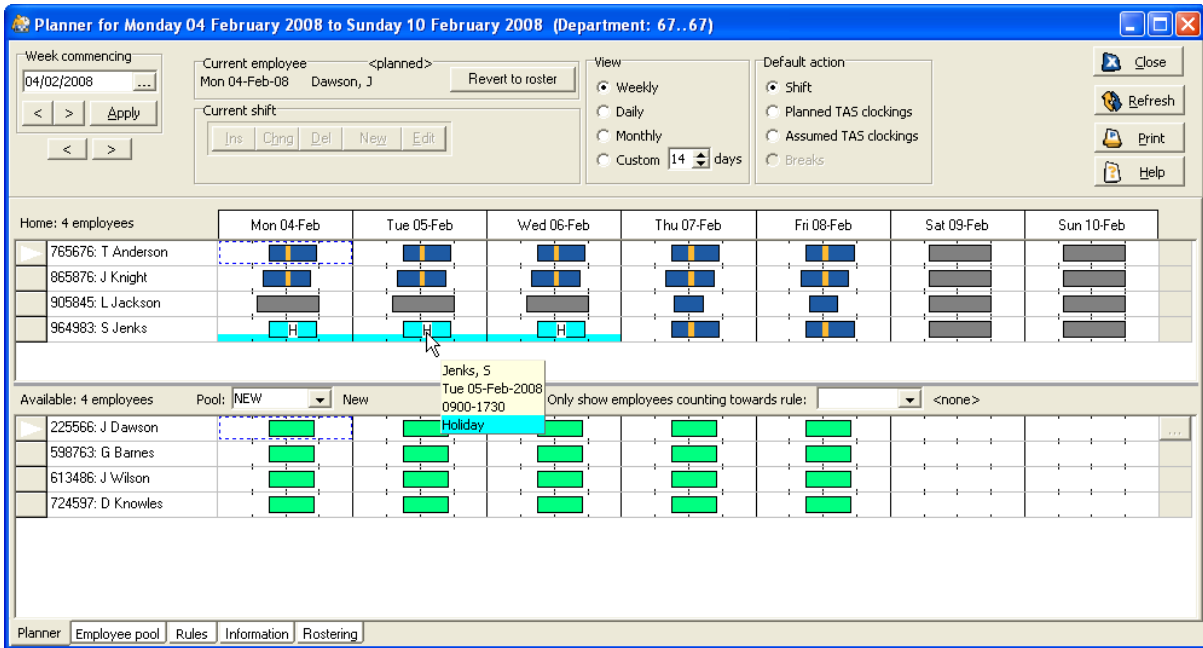
- **Planner** - this panel is the main area, and will always be shown when the planner is first opened. This is the tab used to make most changes to employees' rosters and shifts.
- **Employee pool** - this panel can show any employee pools you have set up, and is used if you need to move available employees from pools to your selected group temporarily.
- **Rules** - this panel shows how well your rosters and employees' work patterns comply with any group rules that have been set up.
- **Information** - this allows additional data to be shown on the planner.

On the work planner you see, you might not see all the panels. The **Employee pool** panel will only be shown if there are any pools set up on your system. To show the **Rules** panel, right-click anywhere within the planner to open up a menu, go to the **Show** sub-menu and tick the **Rules** option. This will then display the **Rules** tab.

16.1 Planner tab

The planner panel is the main section of the future work planner. This may be the only panel that is shown on your system, depending on how your system has been set up.

The planner always opens with details for the current day showing:

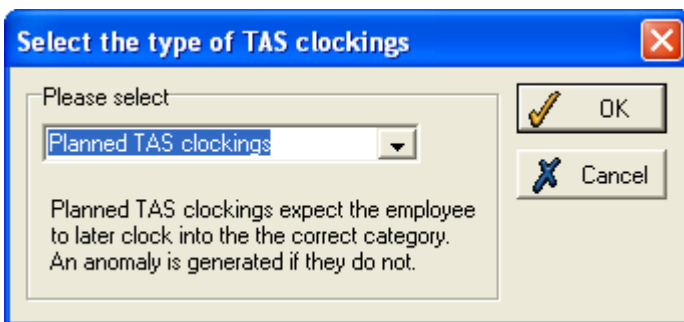


The above page has two main sections. The **Home** section displays the planned work patterns of all employees in the selected department. The employees who will be shown in this section are members of the selected department, and those who have worked, or are scheduled to work, in the selected department for some period in the date range which is being viewed.

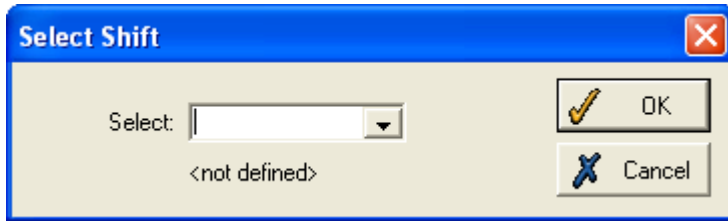
The shifts are represented by differently coloured boxes within the planner grid. If you hover the cursor over any of the shifts, a pop-up box will appear, showing details of the shift (as in the example above).

The **Available** section of the above page displays the shift patterns of employees from other departments who are available to work if needed. This section is only visible on the planner if pools have been set up on the system, the group selected is a Tas category and 'Show pools' has been selected. For more details see **Employee pools** on page 187. You can change the selection of employees appearing in the **Available** section. The **Pool** drop-down list allows you to view available employees from other employee pools. The **Only show employees counting towards rule** drop-down list allows you to view available employees who count towards a certain rule. For example, if you needed an employee who was First Aid qualified, you could choose to view employees who are First Aiders.

To deploy an available employee click on the relevant shift and drag it into the **Home** section. Alternatively, right-click with the shift selected and click **Home work** on the menu that appears. The following form might appear:



The above form only appears if neither Tas clockings nor Planned Tas clockings are selected. Select the type of TAS clockings. For more details see **TAS clockings/Planned TAS clockings**. Click **OK**. The following form should be displayed:



Select the appropriate shift for the available employee to work. Click **OK**. The available employee should now appear in the **Home** section of the Future Work Planner.

You can change the content of the planner page in a number of ways.

16.1.1 Date range

You can view past or future weeks using the **Week commencing** section in the top-left of the screen:



Use these arrow buttons to select the next/previous week on the planner.



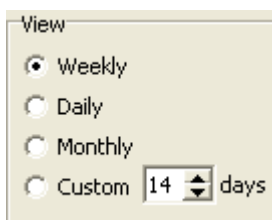
Use these larger arrow buttons to select the next/previous day on the planner.

Click the arrow buttons to view a period commencing on a different day, or select a date using the calendar button:

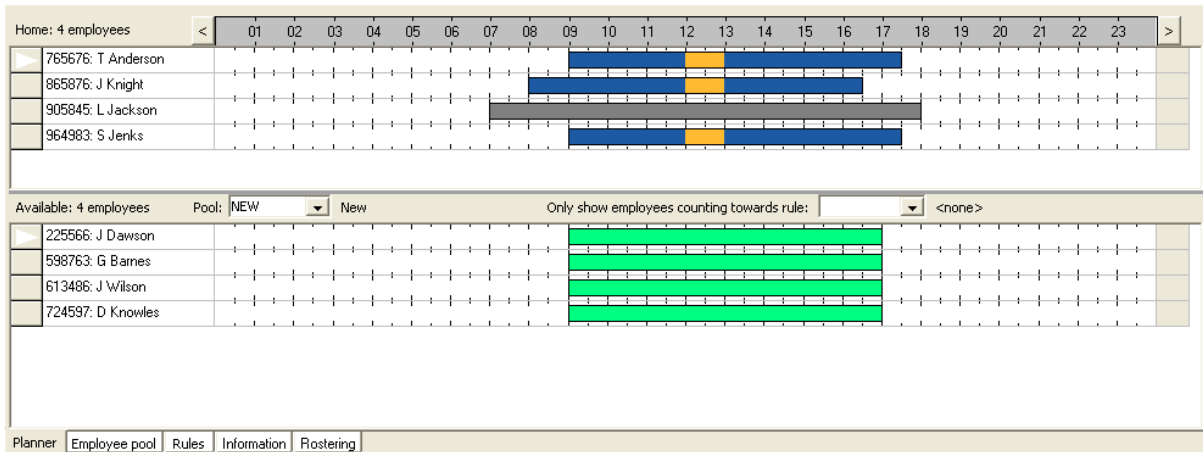


16.1.2 View period

You can choose to view the planner for a week, a single day or for a month, by selecting the relevant box in the **View** section:

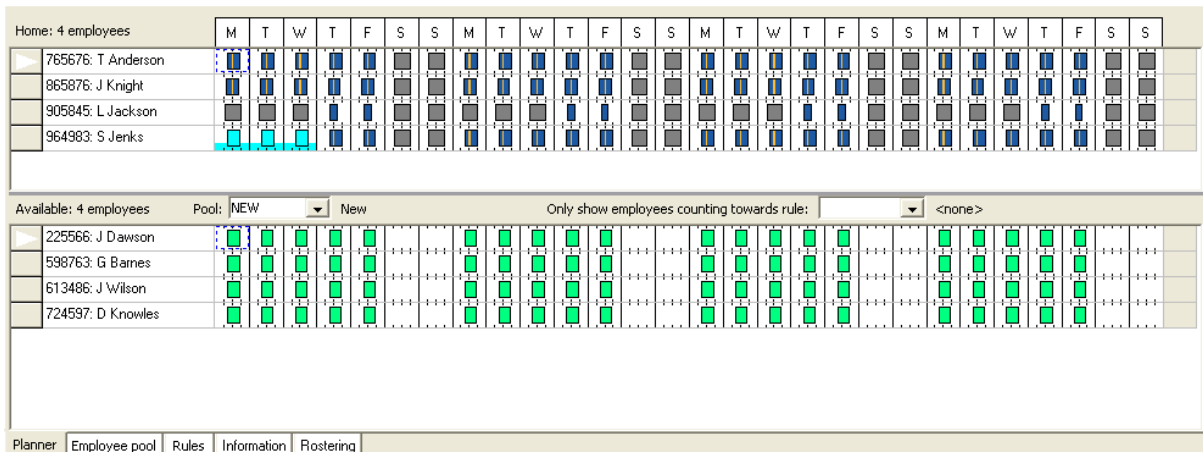


Select **Daily** to view a detailed hour-by-hour plan of the day:



On the daily view, you can see clearly the times of each shift. Each hour is shown at the top of the planner, and you can move the view back or forward an hour by clicking one of the arrows to the left or right of the time bar.

The **Monthly** view allows you to view shift plans over a four week period, starting with the day that was selected:



Although with this view the details of individual shifts are less clear, the different colours give an overview of long-term changes in the work pattern.

The **Custom** view option allows you to view shift plans over a specified day-span.

16.1.3 Select features

The **Default action** section of the future work planner is a list of four options:

Default action

- Shift
- Planned TAS clockings
- Assumed TAS clockings
- Breaks

(Note that **Breaks** is only enabled on the **Daily** view of the work planner.)

Which option is selected will affect what happens when you double-click the mouse on a day in a grid. Note that the information given below only affects future shifts (i.e., those that have not yet been

processed). Whenever you double-click on a past shift (that has already been processed) you will see the **Work record** form for the selected day (See **Edit on Work Record form**, page 115, for details).

Shift

When **Shift** is selected, double-clicking on a shift in the planner will bring up a **Work shift** form with the details of that shift. Double clicking on an area of the planner without a shift will bring up a blank **Work shift** form, for you to define the details of a new shift.

For details of how to modify planned shifts on this form, see **Set up shifts on the work planner**, page 161.

Planned TAS clockings

Planned TAS clockings are clockings which are used in the generation of future work records, but are ignored for the process of creating actual work records. Use them to assign an employee to a particular TAS category for a specified time on a future shift. For example, if an employee from the Support department is needed to work on the Sales department on Thursday, a planned TAS clocking can be entered for the employee for the beginning of the shift on Thursday with the TAS code for the Sales department. Viewing the planner would then show the employee's time as being allocated to the Sales department for that day. This clocking is ignored by the processing at the end of that day. It is merely used as a guide on the future work planner to show what the employee should have been doing. If worked shifts are shown on the planner, the employee's actual TAS clockings can be compared with his or her Planned TAS clockings.

When **Planned TAS clockings** is selected, double-clicking on a shift will bring up an **Add/Edit clocking** form, like this:

There are two **Clocking types** that can be entered from this form - **Planned TAS**, which signifies the start of an employee's time assigned to a particular category, and **Planned TAS end**, which is used to show the end of an employee's time assigned to a category.

For a **Planned TAS** clocking, enter the date and time for the clocking, and select the required **Parameters** for the TAS categories which are set up (click the box at the right of the **Parameters** field to select the options needed). Depending on how your system works, you may also wish to select an hours type in the **Hours/Qual** box. Click **OK** when you have entered the details of the clocking, and the clocking will be shown on the work planner.

A **Planned TAS end** clocking should only be entered after a Planned TAS clocking, to show when the employee returned to his or her normal TAS category. Because of this, you only need to enter a date and time when the employee will come off the previously entered TAS category. Click **OK** when you have entered the details of the clocking.

TAS clockings

This option allows you to enter genuine TAS clockings (i.e., TAS clockings that will count when the work record is created by the processor. While the Planned TAS clockings are simply a guide for managers when viewing the future work planner, TAS clockings are clockings with information attached. This allows you to see not only when an employee clocks in and out, but also indicates what they have been doing.

When **TAS clockings** is selected, double clicking on a shift will bring up an **Add/Edit clocking** form, like this:

There is one available clocking type that can be entered from this form (**TAS**). Select the date and time for the clocking, and select the required **Parameters** for the TAS categories which are set up (click the box at the right of the **Parameters** field to select the options needed). Depending on how your system works, you may also wish to select an hours type in the **Hours/Qual** box. Click **OK** when you have entered the details of the clocking, and the clocking will be shown on the work planner.

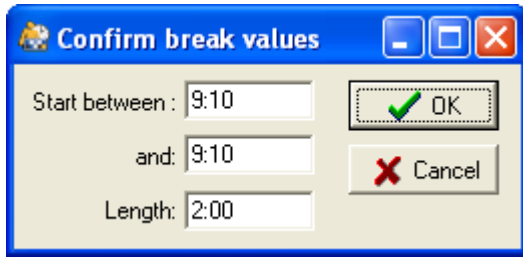
Breaks

This option is only enabled on the **Daily** view of the work planner. It allows you to enter breaks of any length at any point in the shift. Note that you cannot add breaks to any flextime shift.

All breaks are shown in the same colour as the background to the planner (usually white).

When you select the **Breaks** option, this pop-up box appears immediately:

The **Default length** is the length that breaks will last when you enter them. If the **Confirm** box is not ticked, then single clicking within a shift will automatically add a break of the default length starting at the time at which you clicked on the shift. However, it is often advisable to tick the **Confirm** box, meaning that, when you click on a shift, you will see the following pop-up box for you to confirm the break's details before it is added:



Here you can select the limits within which the break must be started, and you can override the default length of the break if you wish.

16.1.4 Modify planned shifts

The work planner is a convenient way of altering your employees' shift plans, because each employee's work pattern is shown alongside the work patterns of the rest of the department, allowing you to see how the changes will affect any rules you have set up.

You can alter shifts in a number of ways, but any changes you make apply only to the selected shift.

NB: If you wish to undo any changes you have made to an employee's shift pattern, click the **Revert to roster** button, which will return the employee to the shift pattern originally set for the date range currently viewable on the Future Work Planner.

16.1.5 Use drag and drop

On the **Daily** planner, you can modify shifts in two ways:

- **Move a shift** back or forward by a length of time, so that the shift is still the same duration, but starts at a different time. Click and hold the mouse anywhere within the shift and drag it to a different time on the planner grid. While dragging a shift, you will see an outline of the shift at the point to which you are moving it. For example, a shift of 8:00 - 16:00 might be moved back an hour to run from 9:00 - 17:00.
- **Lengthen or shorten a shift** by hovering the mouse over the start or end of the shift bar.



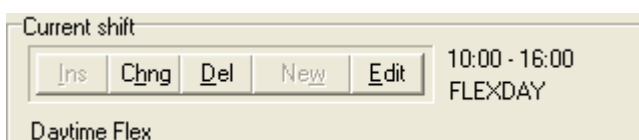
The cursor will change to a 'resize' image, as seen here. Click and drag the shift limit, dropping it at the point you wish to define as the new start or end time. The exact time you have defined is shown in the **Current shift** section (see below).

On the **Weekly** or **Monthly** planner, you can move a shift from one day to another, or from one employee to another.

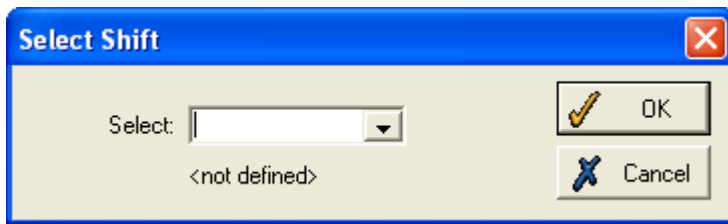
Simply click on the shift you wish to move and drag it to the day the shift ought to be allocated to, where any previously allocated shift will be replaced. The day from which the shift was moved will no longer contain a shift.

16.1.6 Use the Current Shift section

Often it is more useful to use the **Current shift** section of the work planner to alter work patterns. The five buttons in this section allow you to make every possible amendment to the shift plans.



Ins: 'Insert a named shift'. This button is used for inserting a shift onto a day in the Future Work Planner. Click the button and the following pop-up box appears:



Select the shift you require from the drop-down list, and click **OK**. The inserted shift will appear in the work planner.

Chng: 'Change selected shift'. This button is only available when the shift is selected. Use this button to change to a different pre-defined shift. You will see the same 'Select shift' box as for inserting a shift, from which you should select a shift in the same way as above. The shift you select will appear in the work planner, replacing the previously scheduled shift.

Del: 'Delete currently selected shift'. Click and the shift scheduled for the selected shift will be removed from the work planner, leaving the selected day blank.

New: 'Create new shift on current day'. When there is no shift scheduled for the selected shift, this button allows you to define a new shift. Click and a blank version of the **Work shift** form will appear, which can be used to define the properties of a new type of shift (see **Set up shifts on the work planner**, page 161, for details).

Edit: 'Edit current shift'. When a shift is selected, click this button to display a **Work shift** form for the current shift (see **Set up shifts on the work planner**, page 161, for details).

Note: you can also select multiple shifts on the Future Work Planner by holding down the 'CONTROL' button on the keyboard and then clicking on the shifts.

16.1.7 Set up shifts on the work planner

From the work planner, you can set up a new shift for an employee, or amend any details of an employee's current shift.

- To create a new shift for an employee, either click **New** when no shift is selected, or, when **Shift** is the option in the **Select** section above the planner, double click on the planner where there is currently no shift. Please note that this option only works if there is no work shift on the selected day.
- To amend an existing shift, either select the required shift and then click the **Edit** button, or, when **Shift** is the option in the **Select** section above the planner, double click on the required shift in the planner.

A form similar to the following will be shown (although it will be blank if you are creating a new shift):

This form allows you to create a new shift, and define its details, or to change any features of an existing shift.

If you are editing an existing shift, any amendments you make will apply only to the selected day, and all other examples of the same shift, used by this employee on other days, or by any other employees, will not be changed.

Setting up a shift from the future work planner gives you the option of naming the shift, so adding it to the list of shifts, or leaving it as a one-off shift, which cannot be used again on another day:

Name the shift

If you are likely to want to re-use this shift definition for the same employee on a different day, or for a different employee, you will need to name the shift. Click the **Name** button to produce this form:

Enter a new unique name for the shift. This shift is then added to the list of shifts, and can be assigned to any other employees on any day. It can be amended on the **Maintain shifts** form (see page 211).

One-off shift change

If the details you are amending of the shift are only to be used for the selected employee on the selected day, you do not need to enter a name for the shift. It will be recorded as a temporary change, and will not be added to the list of shifts to be assigned to anyone else.

For details of how to set up the details of the shift, see **Work shift form**, page 212.

Employees can be made available for work by selecting a shift, right-clicking into the pop-up menu, and then selecting **Make employee available**. However the employee must be on the main grid of there Future Work Planner and they must be in an employee pool. They must be made available for other departments.

16.1.8 Home work and away work

The principle of this feature of the planner is that each departmental or group manager can clearly see periods of 'home work' - work for the manager's own department or group - and 'away work' - work for any other department or group - on the work planner.

NOTE:

- Home work and away work only exist on the future work planner if your organisation uses TAS clockings, and has a TAS category set up with the same lookup as that used for the type of group displayed in the planner (e.g., department). If you do not have the appropriate TAS category set up, all work will be shown as home work, as the system will not know how to categorise work as home work or away work.
- Also, if your selection options are set to **Extended group select**, and the range you have chosen to view on the Future work planner does not correspond to any TAS category that has been set up, all work will be shown as home work. (For example, with a Department TAS category, if you have selected three departments as the extended range, any work within these three departments will be classed as home work, and work for all other departments will be away work. However, if the range you are viewing is one department plus one cost centre plus one single employee, there is no way of knowing what TAS category to use, so all work will be classed as home work.)

For example, an employee in the Admin department who belongs to a pool might be allocated to spend Monday working for the Sales department, Tuesday for the Marketing department, and Wednesday to Friday working for his own department - Admin.

- When the Admin manager views the future work planner, the employee will be shown as having worked Away work on Monday and Tuesday, and home work from Wednesday to Friday.
- However, when the Sales manager views the planner, the employee will be shown as having worked home work on Monday, and away work on Tuesday to Friday.
- Similarly, when the Marketing manager views the work planner, the employee will have worked home work on Tuesday, and away work on Monday and Wednesday to Friday.

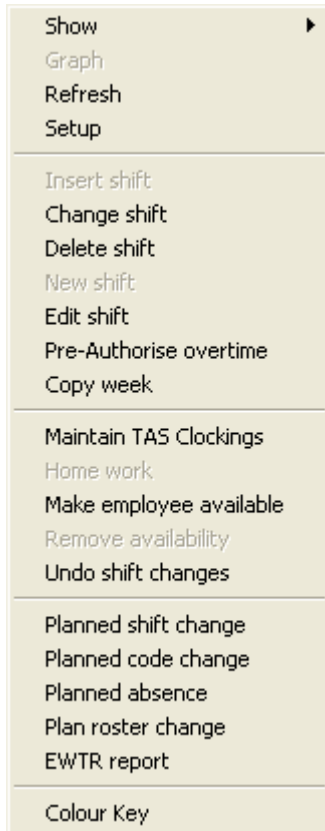
This shows how, although the employee's actual work record is the same, the allocation of home and away work changes depending on which manager is viewing the record. Home and away work do not affect any work record details. They are purely used as a guide to show each group manager the time when an employee was working for the manager's department.

By default, home work and away work are shown in different colours on the planner (these colours can be changed on setup), so that a manager can instantly see which employees worked or will work for him or her and at which times. Managers can make numerous changes to the work record for home work shifts, but cannot make any amendments for away work shifts.

Although home and away work can apply for employees who are not members of pools, it is usually the case that employees whose time you will wish to plan as home or away work will be members of pools.

16.1.9 Planner options

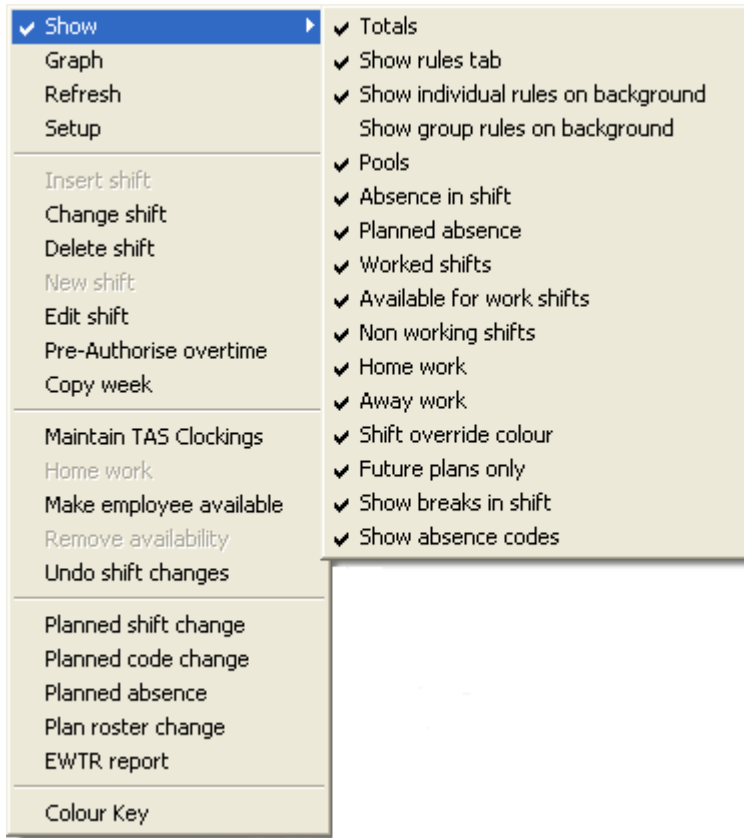
To access a wide range of options available on the future work planner, you must select the option from the pop-up menu obtained by right-clicking on the grid:



For details on the options on the **Show** submenu, see **Show on the planner**, page 164.

Show on the planner

You can select which types of information are shown on the planner by right-clicking the mouse anywhere within the display, to bring up a menu, and then opening the **Show** sub-menu:



Tick as many of the options on the sub-menu as you wish. All ticked options will be shown on the work planner. If any of the **Absence in shift**, **Available for work shifts**, **Non working shifts**, **Home work** and **Away work** options are not ticked, these features will not be shown on the planner. Instead, blank white boxes will be shown where they occur, meaning that you will be unable to see any details of what type of absence or shift occurs on this day. This can help to make the planner less cluttered. For absences and non-working shifts, no white box will be displayed. These will not be shown at all.

Totals

Tick this and the planner calculates the total amounts of various selected features, showing them in extra rows and columns at the right hand side and the bottom of the planner. If no totals are displayed when this option is ticked, this means that no totals have been selected. See **Setup**, page 170, for details on changing which totals are selected.

| Home: 5 employees | | Mon 19-Mar | Tue 20-Mar | Wed 21-Mar | Thu 22-Mar | Fri 23-Mar | Sat 24-Mar | Sun 25-Mar | Plan hrs | Plan pay | Work hrs | Work pay | Count |
|------------------------|-------------------------|-------------|------------|------------|------------|---|------------|------------|----------|----------|----------|----------|-------|
| ▶ | 088888: Tony Kendrick | | | | | | | | 37:30 | £0.00 | 40:01 | £0.00 | |
| | 888222: Simon Footstool | | | | | | | | 37:30 | £0.00 | 39:30 | £0.00 | |
| Planned hours | | 37:30 | 37:30 | 37:30 | 37:30 | 37:30 | 0:00 | 0:00 | 187:30 | | | | |
| Planned pay | | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | | £0.00 | | | |
| Worked hours | | 15:45 | 16:30 | 15:45 | 15:15 | 16:16 | 0:00 | 0:00 | | | 79:31 | | |
| Worked pay | | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | £0.00 | | | | £0.00 | |
| Employee count | | 5 | 5 | 5 | 5 | 5 | 0 | 0 | | | | | 25 |
| Available: 4 employees | | Pool: POOL3 | | Pool 3 | | Only show employees counting towards rule: <none> | | | | | | | |
| ▶ | 000002: Barry Sanderson | | | | | | | | | | | | |
| | 000006: Felicity Turner | | | | | | | | | | | | |
| | 000018: Mark Blackmore | | | | | | | | | | | | |
| | 389000: Nick Finn | | | | | | | | | | | | |

The rows underneath show totals for the day for the selected category. If the planner is set to **Day** mode, these rows show totals per hour for the employees. The columns to the right give the employees' individual totals for the entire week in weekly view mode (on this example, 37:30 hours were planned for Tony Kendrick in the week). In the bottom-right corner the departmental totals for the entire week are displayed.

Show rules tab

This option allows you to specify whether you want the **Rules** tab to be displayed on the Future Work Planner. For more details see **Rules tab** on page183.

Show individual rules on background

Select this option to view the status of the roster against the individual rules that have been set up. You will be able to see where the individual rules have been broken by the areas of the planner highlighted in the specified colour:

| Home: 8 employees | Mon 17-Sep | Tue 18-Sep | Wed 19-Sep | Thu 20-Sep | Fri 21-Sep | Sat 22-Sep | Sun 23-Sep |
|----------------------------|------------|------------|------------|------------|------------|------------|------------|
| 000001: David Hughes | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] |
| 000005: Eddie Davies | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] |
| 000008: Heather Mason | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] |
| 000011: Kerry Christophers | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] |
| 000013: Mark Wordsworth | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] |
| 000017: Tim Blackmore | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] |
| 000022: Owen Richards | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] |
| 000099: Trevor Hunt | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] |

On the example above employee 'David Hughes' has failed the AGE rule and his shift backgrounds are highlighted accordingly. You can hover your cursor over the shifts to view details of the rule violation.

Show group rules on background

This option allows you to view the information displayed on the **Rules** tab as a background to the **Planner** and **Employee pools** tabs as well. See **Rules tab** on page183 for details. If you select this option, vertical coloured bars appear in the background displaying the extent to which group rules have been adhered to:

| Home: 9 employees | Mon 20-Aug | Tue 21-Aug | Wed 22-Aug | Thu 23-Aug | Fri 24-Aug | Sat 25-Aug | Sun 26-Aug |
|----------------------------|------------|------------|------------|------------|------------|------------|------------|
| 000001: David Hughes | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] |
| 000005: Eddie Davies | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] |
| 000008: Heather Mason | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] |
| 000011: Kerry Christophers | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] |
| 000013: Mark Wordsworth | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] |
| 000017: Tim Blackmore | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] |
| 000022: Owen Richards | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] |
| 000099: Trevor Hunt | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] |
| Pool 000004: David Watson | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] |

Absence shift

Tick this option to view absences within a shift. On the example below employee 'T Anderson' has three absent shifts represented by the light coloured boxes. Note that hovering the mouse over an absence reveals a pop-up box, which shows what type of absence is planned for this shift. If you have chosen to display worked shifts and/or future plans only, this pop-up box will display absences that have been taken.

Planned absence

Tick this option to view planned absences appearing as a thin band running through the planner. On the example below employee 'T Anderson' is absent for the first three days of the week, represented by the coloured line:

| Home: 4 employees | | Mon 11-Feb | Tue 12-Feb | Wed 13-Feb | Thu 14-Feb | Fri 15-Feb | Sat 16-Feb | Sun 17-Feb | |
|-------------------|--------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| ▶ | 765676: T Anderson | [Planned absence] | | | | | [Planned absence] | [Planned absence] | [Planned absence] |
| | 865876: J Knight | [Planned absence] | [Planned absence] | [Planned absence] | [Planned absence] | [Planned absence] | [Planned absence] | [Planned absence] | |
| | 905845: L Jackson | [Planned absence] | [Planned absence] | [Planned absence] | [Planned absence] | [Planned absence] | [Planned absence] | [Planned absence] | |
| | 964983: S Jenks | [Planned absence] | [Planned absence] | [Planned absence] | [Planned absence] | [Planned absence] | [Planned absence] | [Planned absence] | |

To view more details about the employee's planned absence, click the button to the right of the planner for the required employee:



This produces the employee's **Planned absence** screen (see page 125).

Worked shifts

When this is ticked, processed shifts (usually including all shifts before the current day) are displayed as well as planned shifts, allowing you to compare what was actually worked with the shift that was planned. Worked shifts appear as thin bars underneath the boxes representing planned shifts. They will be in the colour of whatever type of work (or absence) occurred on that day:

| Home: 7 employees | | Mon 05-Mar | Tue 06-Mar | Wed 07-Mar | Thu 08-Mar | Fri 09-Mar | Sat 10-Mar | Sun 11-Mar |
|-------------------|-------------------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|-----------------|
| | 088888: Tony Kendrick | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] |
| ▶ | 888222: Simon Footstool | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] |
| | 888555: Tim Sinden | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] |
| | 888666: Ben Walker | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] |
| | 888882: Peter Redman | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] |
| | 888884: Paul Lodziak | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] |
| | 888886: Tom Weaver | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] | [Planned shift] |

You can see where any major differences occurred in what was worked from what was planned. To find out more details about any shift that has been processed, double click on the shift and the **Work record** screen (see page 116) will be displayed.

Available for work shifts

There are two types of available for work shifts that are shown on the planner when this option is ticked:

- days when an employee has an 'available shift' rather than a mandatory working day - these have the entire shift box in the **Available for work** colour;
- days when an employee has a mandatory working shift, but has been made available for work in other departments by his or her manager - these have the shift box in the same colour as the type of work planned, but have cross hatching in the **Available for work** colour. These will cover the period of availability , not necessarily the whole shift.

The former can be given to any employee, but the latter can only be given to employees who are in an employee pool.

| Home: 7 employees | | Mon 19-Mar | Tue 20-Mar | Wed 21-Mar | Thu 22-Mar | Fri 23-Mar | Sat 24-Mar | Sun 25-Mar |
|-------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| ▶ 088888: Tony Kendrick | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 888222: Simon Footstool | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 888555: Tim Sinden | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 888666: Ben Walker | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 888882: Peter Redman | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 888884: Paul Lodziak | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 888886: Tom Weaver | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Note in this example how Tony Kendrick has three days with available shifts - these are not mandatory working days. Peter Redman must be in a pool, because he has been made available for work in other departments on Monday and Tuesday, but these are still mandatory working days.

For details on how to make employees available for work, and on the differences between available for work shifts and mandatory working days, see page 116.

Non working shifts

Non working shifts are days when the employee is not planned to be at work (e.g., weekends). They only include days when the employee is rostered to be off work, and not days when the employee has planned an absence. If ticked, these days will be shown on the planner in the selected colour (grey by default). If not ticked, these days will be empty.

Home work

Ticking this will show all home work in the home work colour.

Home work and away work only exist on the future work planner if your organisation uses TAS clockings, and has a TAS category set up with the same lookup as that used for the type of group displayed in the planner (e.g., department). If this is the case, the planner can show different colours for time worked in the currently selected department (**Home work**) and time worked for any other department (**Away work**). If you do not have the appropriate TAS category set up, all work will be shown as home work, as the system will not know what category to use as home and away work.

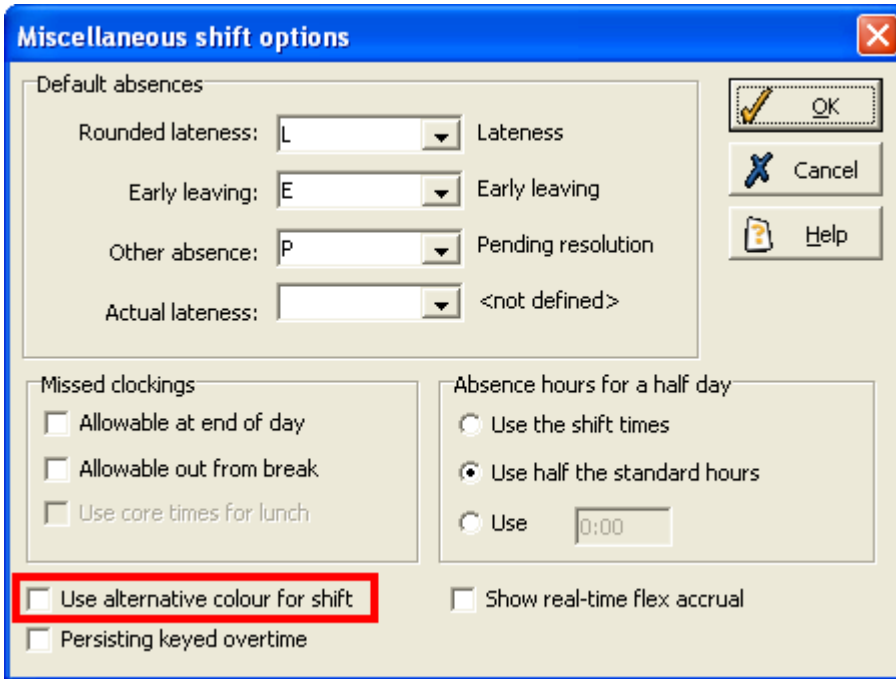
Also, if your selection options are set to **Extended group select**, and the range you have chosen to view on the Future work planner does not correspond to any TAS category that has been set up, all work will be shown as home work. (For example, with a Department TAS category, if you have selected three departments as the extended range, home work will be classed as any work within the three departments, and work for all other departments will be away work. However, if the range you are viewing is one department plus one cost centre plus one single employee, there is no way of knowing what TAS category to use, so all work will be classed as home work.)

Away work

Ticking this shows all away work in the away work colour (see **Home work**, above, for details).

Shift override colour

Every kind of shift is defaulted to appear the same colour on the planner. However, it is possible to customise the colour of different shifts on the planner. To achieve this select **Maintain shifts** from the main **System** menu in TMS. Select the relevant shift from the list and click the **Modify** button. On the **Work shift** form that opens, click the **Misc** button to display a form similar to the following:



Tick the highlighted option and a coloured box will appear. Click on the coloured box to choose an alternative colour for the shift.

In the Future Work Planner, when the **Show override colour** option is selected, this shift should appear in its alternative colour.

Note: you may have to restart WinTMS for the above changes in the work shift form to take effect.

Future plans only

If this is ticked then planned shifts are only shown for each employee after the last processed date for that employee. The Past work shifts are only shown if 'worked shifts' is checked, and they will be shown at the same position in a grid cell as planned shifts. Rules then apply to worked shifts on or before the last processed date and planned shifts after, rather than planned all the time.

Show breaks in shift

Tick this option to display the breaks defined in each shift. The breaks will appear as a white vertical line running through the shift. The example below shows some shifts displayed without the breaks:



Whereas, if the **Show breaks in shift** option is ticked the shifts will appear as follows:



Show absence codes

Tick this option to display the relevant code when an absence appears in a shift on the planner. On the example below, employee 'J Knight' has three days of paternity leave booked, represented by the 'PAT' in the light-coloured absence shifts:

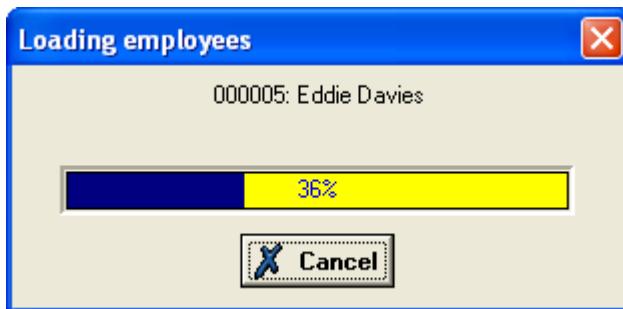
| Home: 4 employees | Mon 18-Feb | Tue 19-Feb | Wed 20-Feb | Thu 21-Feb | Fri 22-Feb | Sat 23-Feb | Sun 24-Feb |
|--------------------|------------|------------|------------|------------|------------|------------|------------|
| 765676: T Anderson | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] |
| 865876: J Knight | [PAT] | [PAT] | [PAT] | [Shift] | [Shift] | [Shift] | [Shift] |
| 905845: L Jackson | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] |
| 964983: S Jenks | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] | [Shift] |

Graph

The **Graph** option is only enabled when **Totals** are being shown on the planner (see **Totals**, page 165 for details). Selecting **Graph** will show a bar chart of the selected totals for the period being viewed. The different totals are plotted against each other, with each day of the period having a separate column. The icons above the graph allow you to change the layout of the graph as well as the type of graph that is shown. The graph can be saved, and you are also able to print out the graph.

Refresh

If you want to refresh the planner at any time, choose this option from the options menu. You may have to wait as the system loads employees into the planner and the following progress bar will be displayed:



Planner setup

Select **Setup** from the pop-up menu to open this form, which allows you to change both the layout and the content of the work planner:

This form has three pages:

Planner page

This page will be displayed when the **Planner setup** is opened.

Print options

This section is used to define how the planner looks when it is printed out. There are three options for the **Style**:

- **Print screen** - the planner will be printed in exactly the way it appears on-screen.
- **Print roster** - only the planned shift details will be printed, and not any worked information. If either of the tick-boxes below are ticked, then the roster will be printed in a different format to the way it is shown on the planner. You can select to **Print shift names only**, **Print shift times only**, **Print TAS clockings** or **Print planned TAS clockings** if you require.
- **Extended planner report** - if selected, the print-out will be a detailed report of the work planner information.

Colours

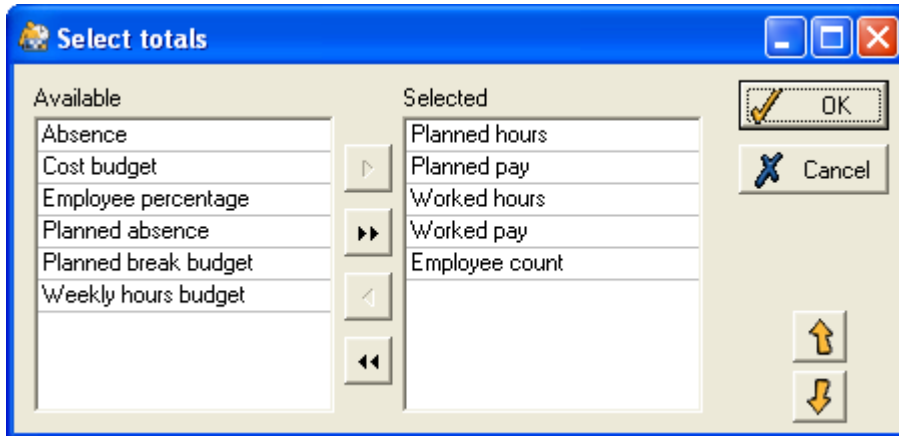
The **General colours** and **Planner specific colours** work in the same way. You can change the colours used for different types of information and shifts shown on the planner, by clicking the coloured box next to the required category. You can then use the form that appears to select a different colour for the category.

Other options

- **Use job grade rates for pay calculations** - tick this if you wish the pay calculations for totals to take the pay rates from the employees' job grades.
- **Display only shift names on web** - this affects the display of the work planner on T&A.NET.
- **Warn on exit if group/individual rules broken** - if these options are selected, the system will inform you if rules have been broken when you exit the Future Work Planner.
- **Allow planned Tas/Tas clockings** - tick this option to allow planned Tas clockings and Tas clockings in the Future Work Planner.
- **Default clocking** - select whether you want planned tas clockings or tas clockings to be the default on the Future Work Planner.
- **Show shift details** - if you select **Times** or **Names**, then each shift on the planner will have text showing either the shift times or the shift name, depending on which was selected. If **None** is selected, this information can still be viewed on the pop-up boxes which appear when you hover the mouse over a shift.
- **Rules** - you can have the system warn employees that either group or individual rules have been broken when they exit the planner and specify that the system checks rules over the entire loaded date range.
- **Sort order** - define the criterion by which employees will be sorted in the planner. Click the **Modify** button and then define the list of sort fields.

Totals

In the **Totals to display** section, the white box contains all the totals that are to be displayed on the planner. If you wish to change this, click the **Modify** button underneath, to open this form:



Use the arrows to move all the required totals into the **Selected** box. The totals will be displayed in the order in which they are shown on this form, so you can use the up and down arrows to move them into the order you require.

Note that the totals you have selected will only be shown if **Totals** is ticked on the **Show** sub-menu (see **Show on the planner**, page 164, for details).

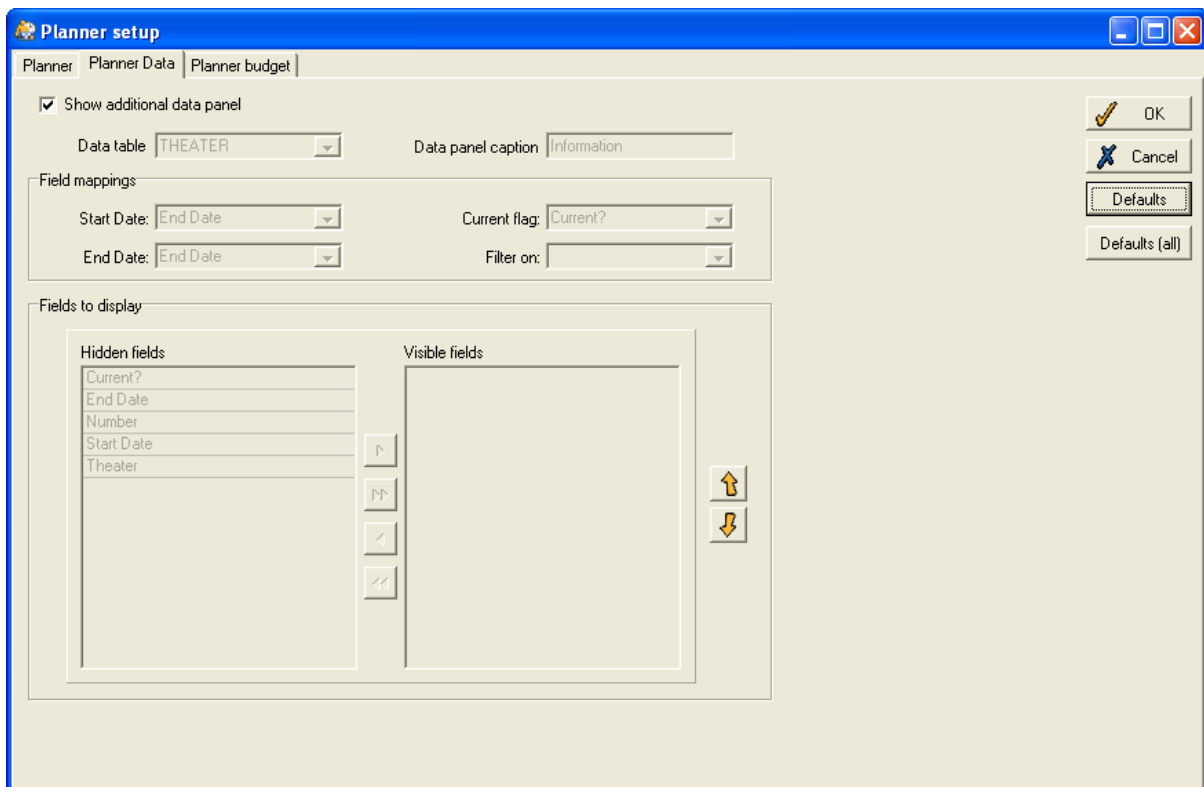
The **Worked codes to ignore** and **Absence codes to ignore** sections (both for hours and pay) work in the same way.

Additional Fields

You can select up to two fields in this section, if you wish to display extra information on the planner. You can select from the drop-down list, which contains all the employee-related fields. If any are selected, they will be shown as additional columns to the right of the employee name column.

Planner data page

Click on the **Planner data** tab on the **Planner setup** form. The following page should be displayed:



Show additional data panel

Tick this option to activate the **Information** page of the Future Work Planner.

Note: the other options on the above page are inaccessible to the user. To modify the data shown on the **Information** page of the Future Work Planner, open **Maintain system preferences** and click the **Planner data** tab. A page identical to the above should be displayed allowing the user to modify the data shown on the **Information** page.

Planner budget

Click on the **Planner budget** tab on the **Planner setup** form. A page similar to the following should be displayed:

Once again these options are inaccessible to the user through the Future Work Planner. There is an identical page to the above in **Maintain system preferences** which allows the user to make amendments.

The future work planner can show a weekly hours budget for employees, both as individuals and in groups. This is designed so that employees who have no fixed roster but who are required by contract to work a certain number of hours per week can be catered for more easily.

In order to be able to record the number of weekly hours budgeted for each employee a field will need to be created on the employee record. To accomplish this, a custom field of type time will have to be added to the TMSTMS table using DBDEF and added to a panel on the employee details form.

Individual budgeting

The **Enable individual budgeting** check box must be ticked on the above form for the individual budgeting preferences to appear. However, you cannot enable these preferences through the planner setup form. Go to the **Planner budget** tab of System Preferences to tick the box. Then enter the name of the field previously added in the **Weekly budget field** box. In the display options box you can set a name for the total column in the planner and custom colours.

Finally, load the future work planner then right click on the grid and select setup. Click the modify button on Totals to display and add the Weekly budget hours total.

The weekly budget will only function when the planner is in weekly display mode and will only be valid if the first day of the display range is the start day of week as set in the preferences. The budget value is only compared to the planned hours.

Group budgeting

The preferences for group budgeting can also only be accessed through the **Planner budget** tab of System Preferences. You can enable budgeting for the relevant group.

Insert shift

If there is currently no shift any where on the planner, right-click in the empty box and select **Insert shift** on the pop-up menu. The following form should be displayed:

Select the required shift from the drop-down list and then click **OK**. The selected shift should now appear in the planner.

Change shift

If you want to change a shift on the planner, right click on the shift and select **Change shift** on the pop-up menu. The **Select shift** form will appear, allowing you to choose an alternative shift. Click **OK** and the shift will automatically change on the planner.

Delete shift

If you want to remove a shift from the planner, right click on the shift and select **Delete shift** on the pop-up menu. The shift will be removed from the planner.

New shift

You can use this menu option to define a new shift on the planner. For more details see **Set up shifts on the work planner** on page161

Edit shift

You can use this menu option to edit an existing shift on the planner. For more details see **Set up shifts on the work planner** on page161

Authorised Overtime

There are two categories of overtime - authorised and unauthorised. Unauthorised overtime is when an employee works overtime that has not first been planned. This produces an anomaly, which the supervisor must authorise in order for the overtime to be credited to the employee.

Authorised overtime occurs when TMS is informed in advance that the employee will be working a set number of additional hours on a specified day. Authorising overtime in advance reduces the number of daily anomalies to check on the system.

Plan overtime

Select the required shift, right-click, and then select **Pre-authorise overtime** from the pop-up menu obtained, to display the following form:

The top of the form shows the overtime available to be worked on the employee's shift (in this example, overtime is available for two hours before and after the standard shift).

Enter the number of hours you wish to authorise in the **Pre-authorise** box. If the **Advanced** box is ticked you can also designate when the overtime is to start (in this instance, at the end of the shift), and, in the **Pay at rate** box, what the overtime pay should be calculated as (in this case, time and a half).

Copy week

This option, only available when the planner is in **Weekly** view, allows you to replicate for future weeks the roster for the week currently being viewed. Selecting **Copy week** from the pop-up menu brings up this form:

Enter in the box the number of weeks the current week should be copied for. You can enter any number between 1 (which will just copy for the following week) and 52. Note that only details of the actual shifts are copied, and not Planned TAS clockings, home or away work, availability etc.

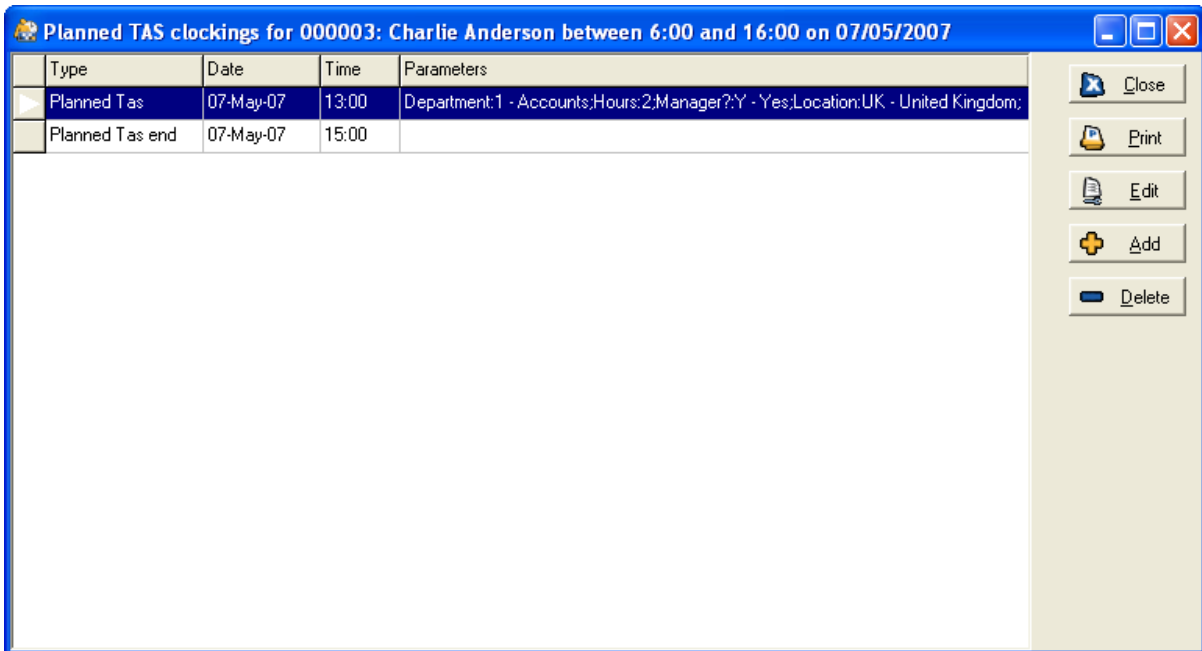
Maintain TAS clockings

This option on the pop-up menu caters for both planned TAS clockings and TAS clockings. You can select either option from the **Default action** panel on the top of the planner, displayed below:

If neither TAS clockings or Planned TAS clockings are selected on this panel, you will be prompted to choose between them when you select the **Maintain TAS clockings** option on the right-click menu.

*Planned TAS clockings***Single shift:**

When a single shift has been selected, clicking this menu option gives you access to a list of all **Planned TAS clockings** over the duration of the shift:



The buttons on the right allow you to **Edit** or **Delete** clockings in the list, and to **Add** new clockings. If you are adding or editing a clocking, this form will be displayed:

Add/Edit clocking

Clocking type
 Planned TAS Planned TAS end

Date/Time
 07/05/2007
 13:00

Parameters
 TAS0=1,TESTN1=2,MULTI=Y,TAS2=UK

Hours/Qual: []

OK Cancel

There are two **Clocking types** that can be entered from this form - **Planned TAS**, which signifies the start of an employee's time assigned to a particular category, and **Planned TAS end**, which is used to show the end of an employee's time assigned to a category.

For a **Planned TAS** clocking, enter the date and time for the clocking, and select the required **Parameters** for the TAS categories which are set up (click the box at the right of the **Parameters** field to select the options needed). Depending on how your system works, you may also wish to select an hours type in the **Hours/Qual** box. Click **OK** when you have entered the details of the clocking, and the clocking will be shown in the list.

A **Planned TAS end** clocking should only be entered after a Planned TAS clocking, to show when the employee returned to his or her normal TAS category or is available to work in a new TAS category (see available shifts below). Because of this, you only need to enter the date and time when the employee will come off the previously entered TAS category. Click **OK** when you have entered the details of the clocking.

Multiple shifts:

More than one shift can be selected at a time, by holding down the **Ctrl** key and clicking on each shift you wish to select (you will notice each selected shift has a border in the colour defined for selected shifts in the **Setup**). You can then add a Planned TAS clocking for all the selected shifts, provided that they are all on the same day and they are all mandatory working days. When you select Planned TAS clocking from the pop-up menu, instead of being taken to a list of clockings, you will go straight to the **Add/Edit clocking** form. Enter the details of the clocking in the same way as explained above for individual shifts. The Planned TAS clocking will be added for all employees, although if the clocking falls outside the start and end times of any of the selected shifts, it will not be added for that employee. A message will inform you that it was not possible to add the planned TAS clocking for that employee, but the clocking will still be added for all other selected shifts.

Anomalies:

The planned TAS changes will cause changes to the projected costs of particular departments. However, it is necessary to check that these changes actually occurred and to advise the managers of any significant variations. A new anomaly occurs if an expected TAS transaction has not occurred or if it is not of the expected type.

Anomalies will appear on the list of both the employee's home group as well as on any group into which the employee transferred during the shift. In this way either manager can resolve the anomalies.

The parameters concerning the new anomalies will be set-up on system preference process options screen. This is necessary because employees will not actually clock in the new department at exactly the same time as they were expected. Some acceptable variation in the times is needed.

TAS clockings

The difference between TAS clockings and Planned TAS clockings is explained in **Select features**, page 157.

When this menu option is selected, it will function in almost exactly the same way as the Planned TAS clockings function. The only difference is the **Add/Edit clocking** form, which will look like this:

Enter the date and time of the clocking, and select the Parameters in the same way as for Planned TAS clockings. It is not usually necessary to fill in the additional information on this form. Click **OK** to save the clocking.

Home work

This option is only enabled for shifts when the selected employee has a period of availability. If multiple shifts have been selected, all selected shifts must have periods of availability to enable **Home work**.

Clicking the **Home work** option will add a TAS clocking or a Planned TAS clocking (depending on which one you select) with the value of the home TAS category, either at the start of the shift or at the start of the period of availability in the shift (e.g., if an employee is working for another department between 9:00 and 12:00, but is available between 12:00 and 5:00, then clicking home work for this shift will add a Planned TAS clocking at 12:00, so the employee is assigned to home work for the afternoon).

If multiple shifts have been selected, the Planned TAS clocking will be added for all selected shifts, at the respective start times of available periods for each shift.

Note that, if **TAS clockings** is the option in the **Select** section above the planner, rather than a Planned TAS clocking, a TAS clocking will be entered.

For details on how home work functions and when the home work and away work features are available, see **Home work and away work**, page 168.

Make employee available/Remove availability

These two options are only enabled when the employee selected is a member of a pool, and is a permanent member of the group being viewed (i.e., is not present in the department only by virtue of TAS clockings). Clicking **Make employee available** opens this pop-up box:

This is used to specify what times the employee is to be made available for and is for the use of other departments. If you wish to make the employee available for the whole shift, tick the **For the duration of the shift** box. If this box is not ticked, you should enter the start and end times of the employee's period of availability in the two boxes. Click **OK** and the shift will then be displayed in the planner with cross hatching of the 'available for work' colour, either for the whole shift, or for the period which you have made available.

The same principle applies if you have selected multiple shifts. You can select more than one shift for an individual employee, or select shifts for a number of different employees. If you select **For the duration of the shift**, the availability will last for the entire length of each selected shift. If you are entering the start and end times, they must both be within the period covered by each shift selected. For example, if you have selected two shifts, one from 08:00 to 14:00, and one from 11:00 to 17:00, then the start and end times entered here must be between 11:00 and 14:00.

Undo shift change

Select this option to undo any temporary changes to shifts you have made on the planner.

Planned shift change

Selecting this option from the menu displays the employee's **Planned shift changes** form. Any changes can be modified or deleted, and you can also plan additional shift changes from this form. For details on using this form, see **Planned shift changes**, page 47.

Undo shift change

Select this option to undo any temporary changes to shifts you have made on the planner.

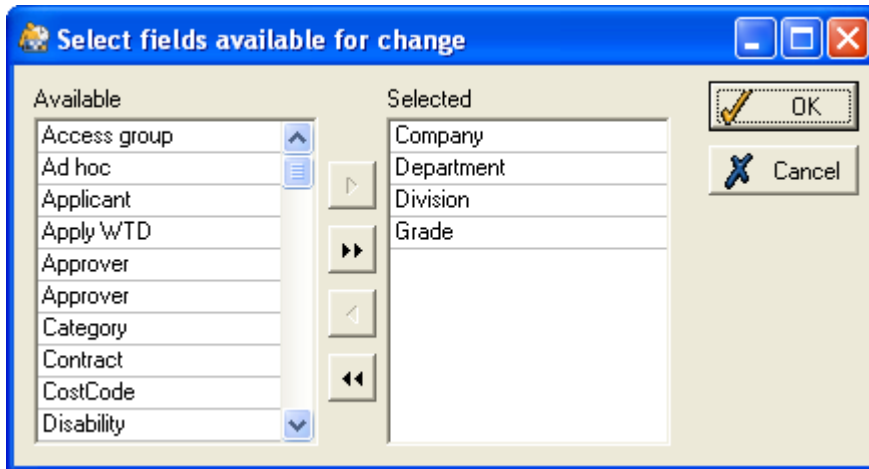
Planned shift change

Selecting this option from the menu displays the employee's **Planned shift changes** form. Any changes can be modified or deleted, and you can also plan additional shift changes from this form. For details on using this form, see **Planned shift changes**, page 47.

Planned code change

This option is used to make a temporary change to the value assigned to the employee for any codes on the system which form the employee's details. This form is displayed:

You can change the value of any employee-related code, and specify when this change is to take place. Select the code you wish to change from the drop-down list in the **Code** box. If there are no codes listed, or the code you require is not in the list, click the **Advanced** button to open this form:



Use the arrows in the usual way, to ensure the code that you wish to change for this employee is in the right-hand **Selected** box. In this example, all four codes in the **Selected** box can be selected from the **Code** box on the previous form.

When the required **Code** has been selected, you should then select the **New value** you wish to assign for this code for the employee. Also select the dates for which you wish this code change to apply. By default, the **From** and **to** boxes will each be set to the date of the shift you selected in the planner, meaning that the code change would only apply for that one day. However, you can change the dates using the calendar buttons, to define the code change as lasting for a different period. Clicking the **History** button at any point allows you to view the employee's current value for the code, and any previous changes that have been made. Click **OK** to save the code change.

If you have changed the code that is used as the group type that you are viewing on the planner (e.g., if you are viewing the planner for a particular department, and you have changed the department code for an employee), you may see the change reflected in the type of work for which the employee is scheduled. If you have changed the employee's department for one day, that day may then be shown in the **away work** colour, because the employee will be working for a different department.

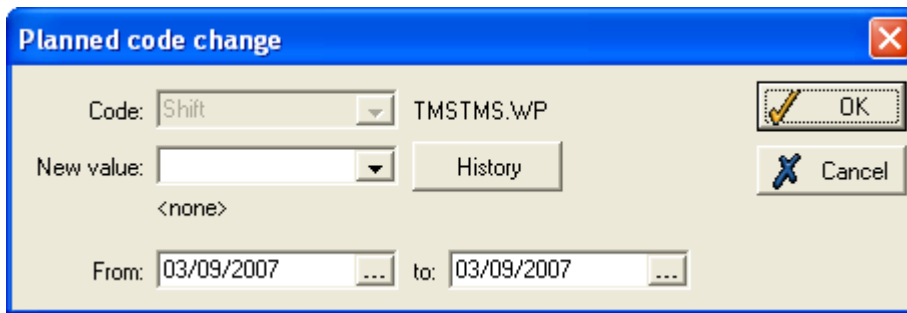
Note: the **Advanced** option is only available if you have access to System Preferences, which will not be the case for the majority of users.

Planned absence

Clicking this option opens the employee's **Planned absences** form, showing all absences that have been planned for the selected employee. The bottom row of the table shows a new Holiday absence for the day on which you clicked. This can be modified or deleted if you do not wish to add an absence for this day. For details of how to use the form, see **Employee's planned absence**, page 166.

Plan roster change

This option will allow you to change an employee's roster. For more details see **Rosters** on page 227. When you select this option from the right click menu the following form should be displayed:



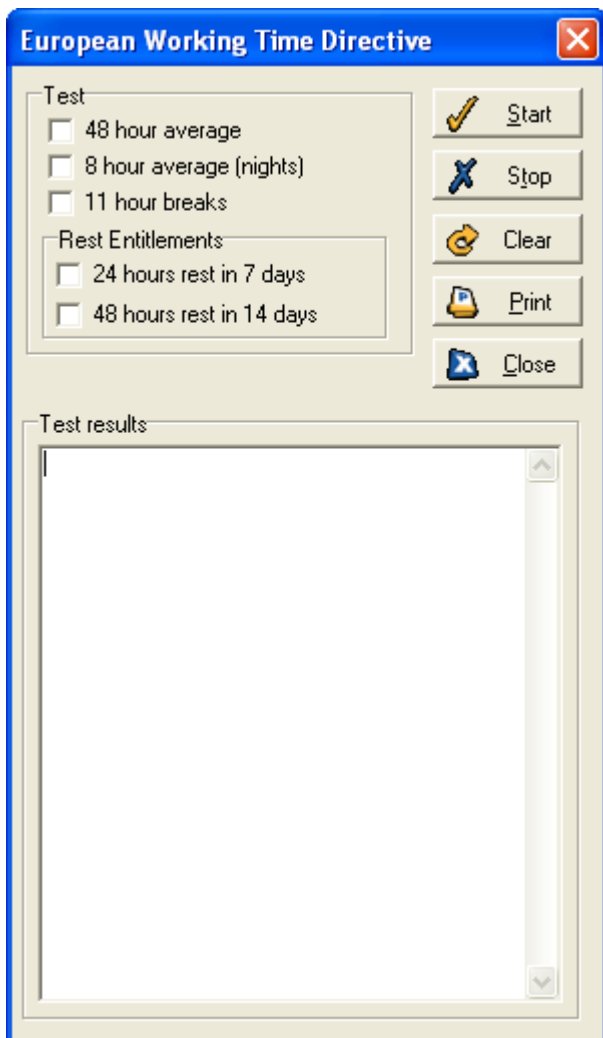
The dialog box titled "Planned code change" has a blue header bar with a close button (X) on the right. The main area is light beige. It contains the following elements:

- Code:** A dropdown menu showing "Shift" and a text field containing "TMSTMS.WP".
- New value:** A dropdown menu currently showing "<none>". To its right is a "History" button.
- From:** A date field showing "03/09/2007" with a calendar icon (three dots).
- to:** A date field showing "03/09/2007" with a calendar icon (three dots).
- Buttons:** On the right side, there are three buttons: "OK" (with a pencil icon), "Cancel" (with an X icon), and "History" (positioned between the "New value" and "From" fields).

Enter the new roster into the **New value** field using the drop down list, then define the time scale in which the employee will be assigned to the new roster, using the **From** and **To** fields. After the specified time, the system will revert the employee to their previous roster.

EWTR report

Clicking this option opens the following form:



The form titled "European Working Time Directive" has a blue header bar with a close button (X) on the right. The main area is light beige. It contains the following elements:

- Test:** A section with three checkboxes:
 - 48 hour average
 - 8 hour average (nights)
 - 11 hour breaks
- Rest Entitlements:** A section with two checkboxes:
 - 24 hours rest in 7 days
 - 48 hours rest in 14 days
- Buttons:** On the right side, there are five buttons: "Start" (with a pencil icon), "Stop" (with an X icon), "Clear" (with a circular arrow icon), "Print" (with a printer icon), and "Close" (with a window icon).
- Test results:** A large empty text area with a vertical scrollbar on the right side.

This form allows you to run a report to check that employee's work patterns are honouring European Working Time Regulations. For more details see

Maintain budget values

Clicking on this option displays a form similar to the following:

Maintain budgetary values

Budget values

| StartDate | Enddate | lookup | Value | CostValue |
|------------|------------|---------------|-------|-----------|
| 08/05/2006 | 14/05/2006 | OD.DEPARTMENT | 2 | 700.00 |
| 15/05/2006 | 21/05/2006 | OD.DEPARTMENT | 2 | 600.00 |
| 29/05/2006 | 04/06/2006 | OD.DEPARTMENT | 1 | 500.00 |
| 05/06/2006 | 11/06/2006 | OD.DEPARTMENT | 1 | 500.00 |

OK
Cancel

This form allows you to maintain the budgetary values you have set up. To amend the budgetary values, click on any field and make the appropriate adjustments.

Generate budget values

Clicking this option will open the following form:

Generate budgetary values

Base absence

Lookup code: Start Date:

<Description>

Lookup value: End Date:

Cost value:

Repeat parameters

Repeat for occurrences

Generated changes

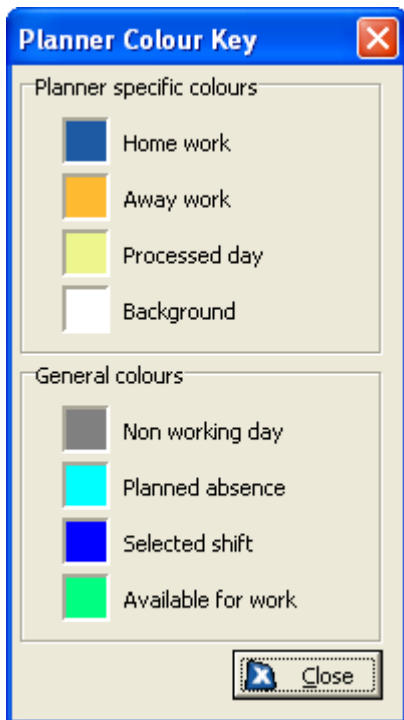
| StartDate | Enddate | lookup | Value | CostValue |
|-----------|---------|--------|-------|-----------|
| | | | | |

OK
Cancel

This form allows you to set up budgets for employees within **TMS**. Define your budget by entering an appropriate Lookup code and value, Cost value and start and end dates.

Colour key

Click this option to display a form similar to the following:



This is a colour key for the shifts on the planner. For instructions on how to change these colours see **Setup** on page 170.

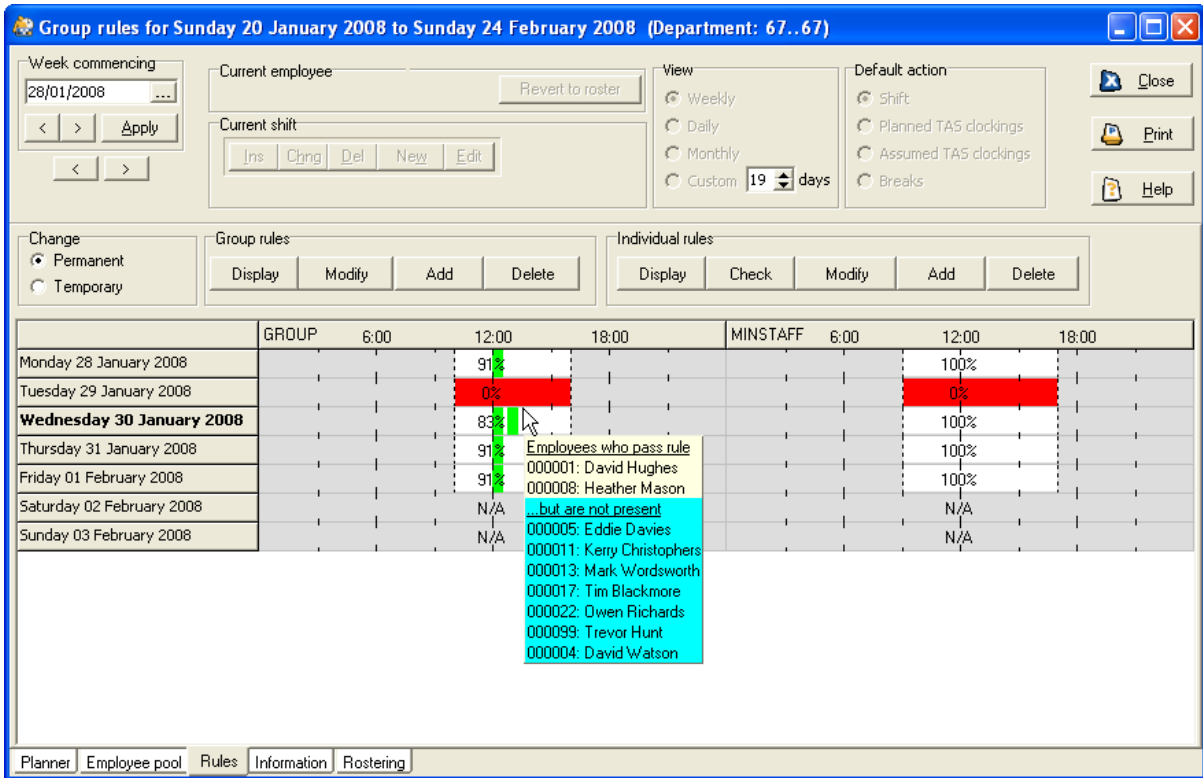
16.2 Rules

Introduction

Rules can be set up in TMS to define various criteria that must be met by your employees' shift patterns. Any periods in the roster where a rule is violated can be highlighted on the future work planner. There are two types of rules which can be defined in TMS - group rules, for which the result of the rule is calculated using the sum of the number of employees present who pass the rule; and individual rules, for which the result is determined independently for each employee. For more details on how to maintain rules, see **Maintain staffing rules** on page 239.

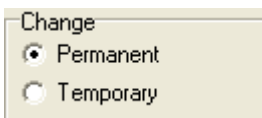
16.2.1 Rules tab

If you have rules set up on your system, you will be able to view the way your shift patterns comply with them on the . Individual rules will be displayed on the **Planner** tab, but group rules will be displayed on the **Rules** tab. The main component of the rules tab is a grid which displays group rules:



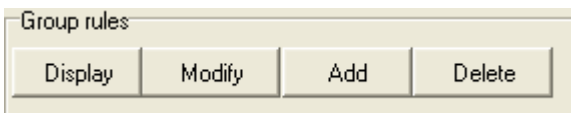
This panel on the **Future Work Planner** shows to what extent group and individual rules have been adhered to. As shown above, you can hover the cursor over the panel to display more details.

Note: if **Show Future plans only** is selected, rules for days in the past lie before the last processed date apply to real not planned work records.



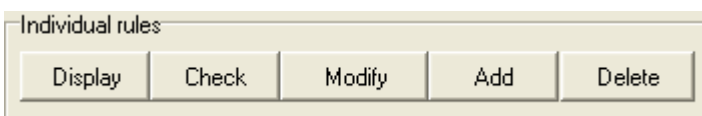
Use this section of the panel to specify whether you wish to make permanent or temporary changes to rules. You can also make permanent changes to the rules through the **Maintain staffing rules** on page 239. If **Temporary** is selected you will only be able to display or modify rules on the panel, but not add or delete them.

16.2.2 Modify group rules on the planner



You can make changes to group rules whether or not they are displayed on the grid, through these buttons on the panel. You can also make modify group rules through **Maintain staffing rules** on page 239.

16.2.3 Modify individual rules on the planner



For individual rules it is possible to **Modify** the rule and to change whether or not it is displayed. In addition it is possible to see any breaches of the rule over the time period displayed by the planner, as long as the rule itself is set to be displayed in the **Rules** grid. Individual rules are also displayed on the **Planner** tab.

By default the Rules grid shows rules that have an employee list overlapping the employee list shown on the planner tab, as well as those that have their employees set to Planner Selection (see **Groups** in **Add a New Rule**, p. 244). Hovering over the period a rule is applicable will produce a hint showing which employees pass the rule at the appropriate time.

Individual rules apply only on a particular day to a subset of individuals who meet the criteria for that rule. Individual rules therefore have no **Parameters** (apart from the colour selected to indicate a rule violation) or **Degrees**. They are simply either passed or broken. This change can be seen on the form below:

Individual rules are useful if you have a particular subset of employees that require special monitoring; for example an individual rule may be set up for workers under the age of sixteen which is broken if they work past a certain time. The rule will then display as broken if such an employee is selected to work past that time, and the situation can then be resolved.

In this case:

(AGE<16) Aged less than sixteen

and

(WRWSEND>22:00) shift ends after 10pm

and

(age<>0) to de-select employees for whom a date of birth has not been entered.

16.3 Employee pools

Employee pools can only be used on systems with TAS (Time Allocation System) licences. Any employee can be added to any number of pools; departmental or site managers are then able to

select employees from pools to cover staff shortages, periods of high demand, or any other circumstance.

16.3.1 Maintain employee pools

Employee pools are created and modified from the form below, which appears when you select **Maintain employee pools** from the **System** menu:

| NEW | New pool |
|---------|---------------------|
| POOL1 | |
| POOL3 | Pool 3 |
| SUPPORT | Can work in support |

Buttons: Modify, Close, Add, Delete, Copy

This lists all pools that exist on your system. To modify an existing pool, select it and click **Modify**. This brings up the same **Modify employee pool** form as that shown for adding a new pool, as explained below.

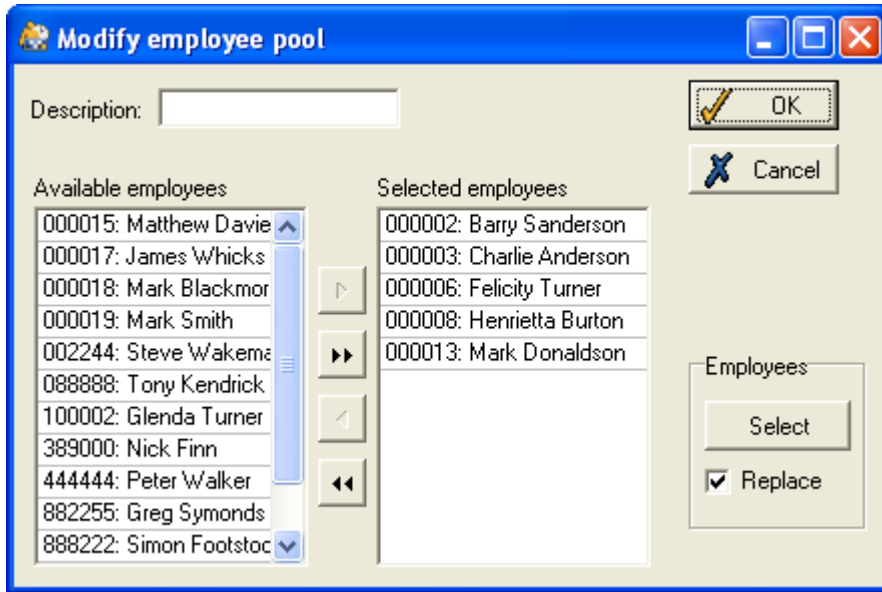
To create a new pool, click the **Add** button. This window appears, prompting you to enter a new unique name for the pool:

Please enter new

<none>

Buttons: OK, Cancel

Enter a name and click **OK**. This form is displayed:



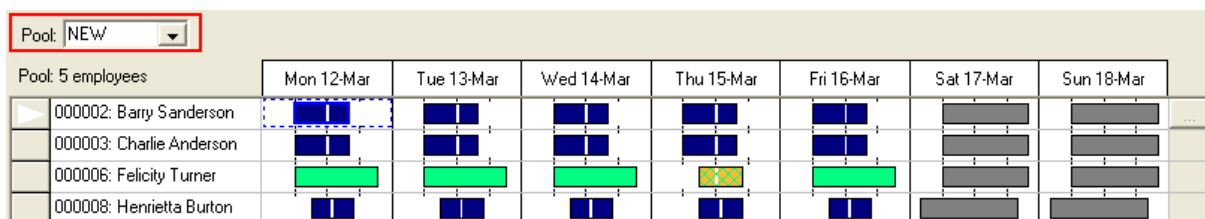
On this form, you should enter a description of what the pool is for. In this example, the pool is for employees who can work in the Support department of the company. Select the employees you wish to add to the pool using the arrows in the usual manner. When you have added all required employees, click **OK** to save the details of the pool.

You can use the **Select** button to make an employee selection. Tick the **Replace** option to replace the employees in the pool with your own selection.

You can create as many pools as you need. In some organisations, you may only need one pool, containing employees who can work in various different departments, while in other companies you may need pools of employees with a particular skill or qualification, who are based at a particular site, or any other relevant criteria.

16.3.2 Employee pools on the planner

Open the **Future work planner** and click the **Pools** tab. It is only visible if your system is TAS licensed and if at least one employee pool has been set up (see 'Employee Pools', page 185). Once clicked, it shows all employees in a selected pool; this pool can be changed using the drop down menu on the top left of the screen, as highlighted below:



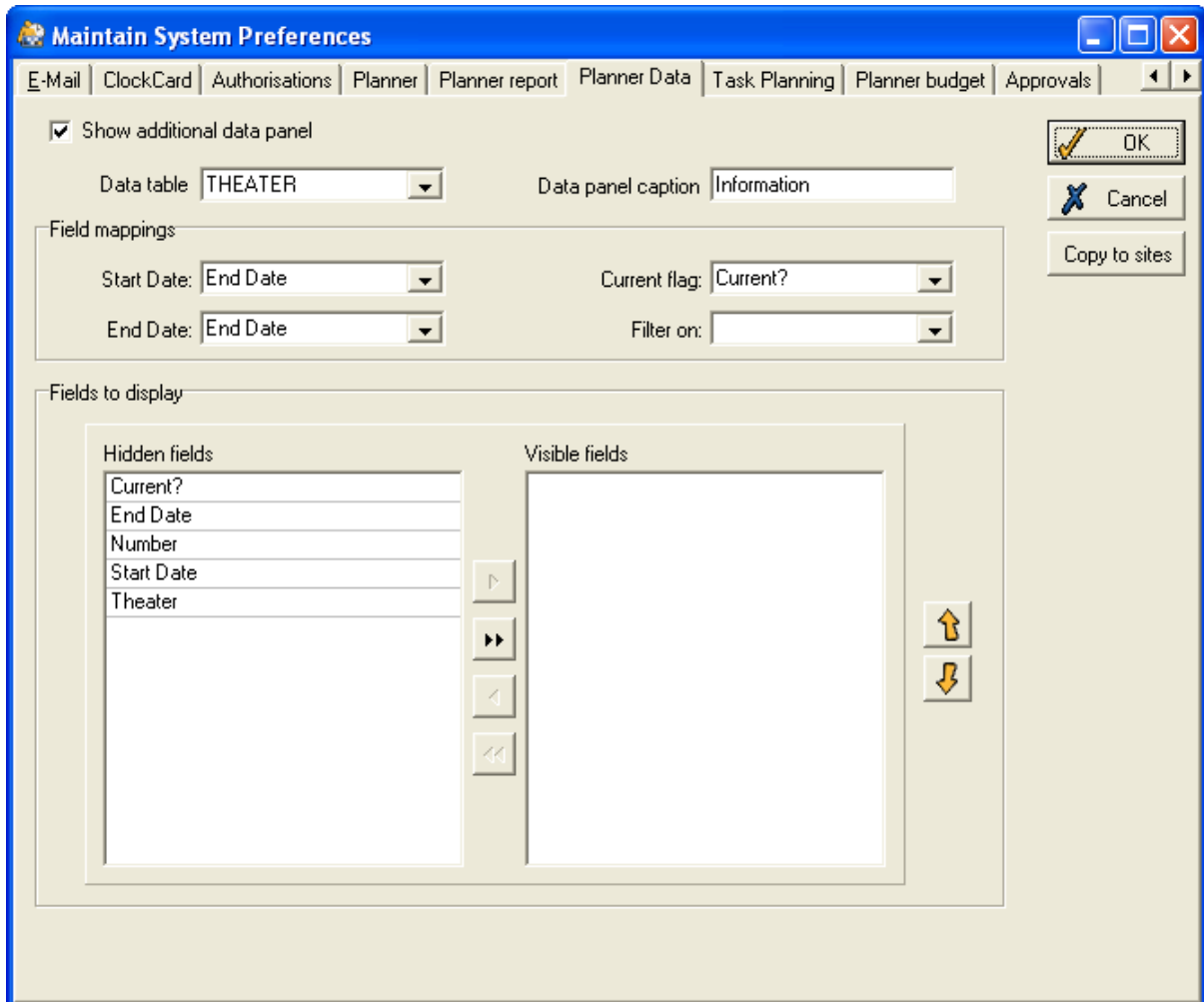
16.3.3 TAS categories for pools

Before you can use pools effectively, the TAS categories on your system must be set up correctly. This means that there must be a TAS category which corresponds to the category managers use to view the future work planner. In most cases, managers view the employees in their own department, site or other type of group on the future work planner. However, some organisations use extended group select, which means that each time the work planner is opened, a different range of employees can be selected. Due to the possible misunderstanding of what is defined as 'home' and 'away', Pool Employees and Away Work only operate in extended group select mode, if the selection is on a TAS category.

In the examples here, the future work planner will be viewed by department. If you use another type of group, then it will function using the same principle.

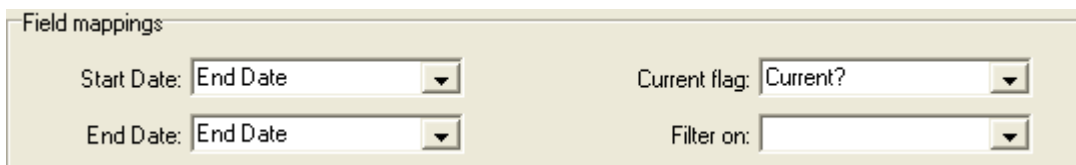
16.4 Information tab

This tab is used to show any additional information desired by the user; for example a job list or list of visitors. This option can be selected or de-selected on a per-user basis by ticking the **Show additional data panel** option, located on the **Planner data** panel of the **System Preferences** menu:



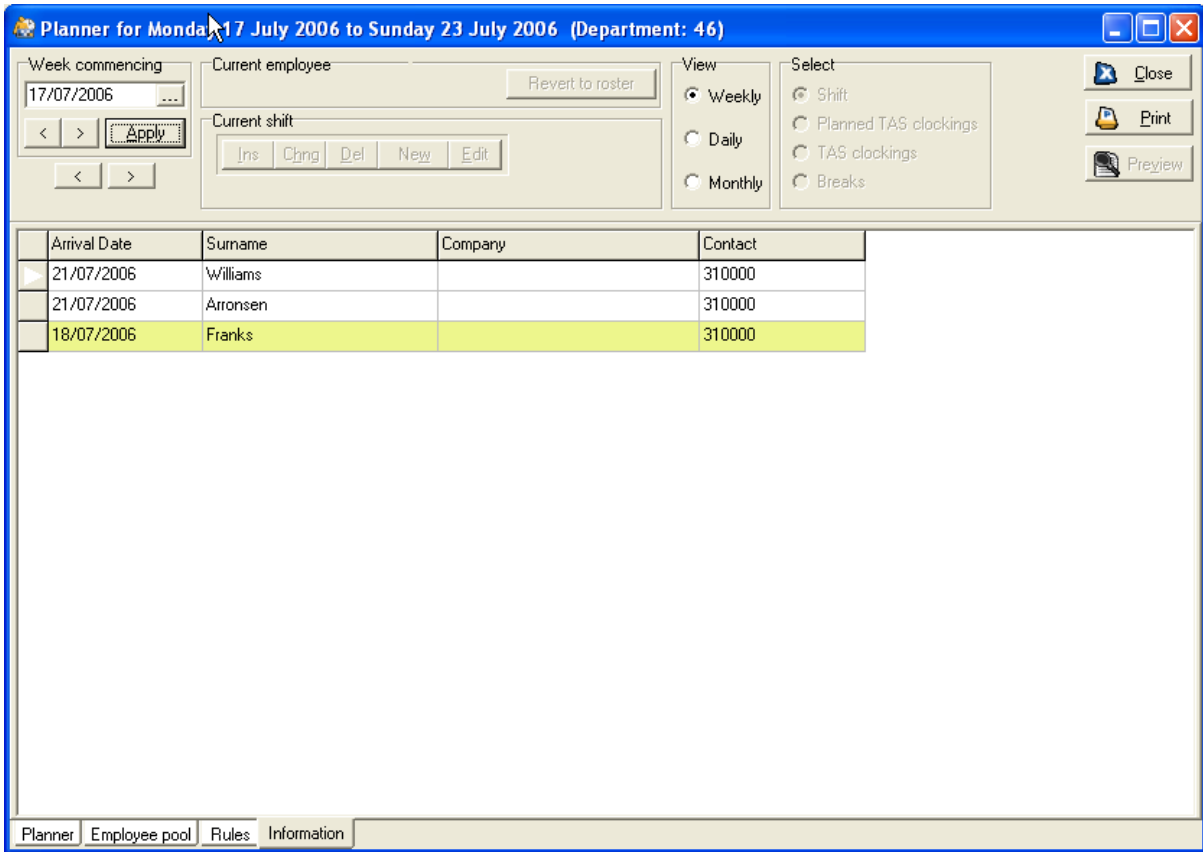
Selecting **Show additional data panel** allows the information tab to be displayed. Once this is done, select the table from which the data will be drawn, and the name which you wish to be displayed with the data in the information tab.

The field mappings pane or group box allows you to define which fields contain start and end dates. If the **Current flag** option is set to false the selected record on the Information tab is cancelled.



Once this has been done, you need to set which fields will be visible and which hidden within the tab by using the '**Fields to display**' pane at the bottom of the screen.

Once this has been done a new tab containing your chosen information and caption will be displayed the next time you open **Future Work Planner**. Clicking on the tab will show the data for the date range currently selected by the planner:



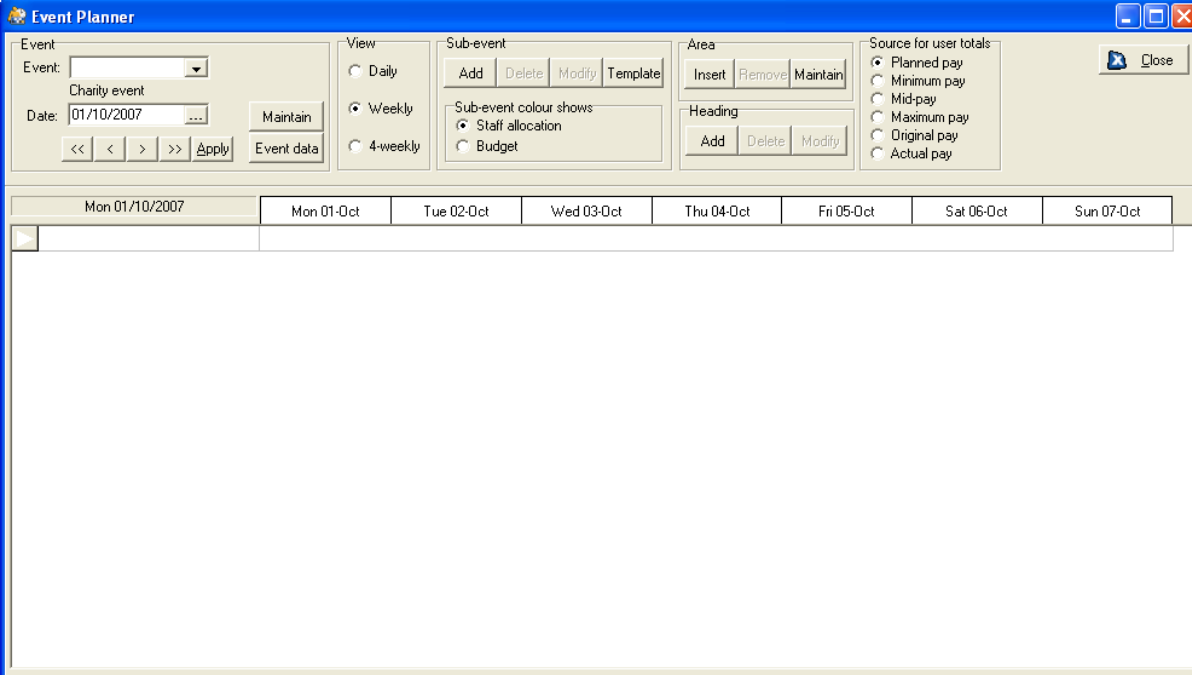
Entries before today's date will be shown using the planner processed background colour, with those for today and the future in the planner's default background colour. Cancelled items are shown with a line through the text.

17 Staff Allocation

17.1 Introduction

Staff Allocation allows you to organise and facilitate an event easily through TMS. You can store data relating to the event and then use the system to calculate probable costs and staff required.

Select **Staff Allocation** from the **Group** menu to a form similar to the following:



This is the main **Staff Allocation** planner form. This form stores and displays four different kinds of code:

Event: the main event or function that has been organised (e.g. an awards ceremony).

Sub-event: different functions that are taking place as part of the main event (e.g. catering, merchandise sales) at a specific time.

Area: physical parts of the site where the event is taking place (e.g. Reception). Unlike sub-events, these are permanent.

Heading: user-defined headings to organise the displaying of the event on the **Staff Allocation** form (e.g. 'food', 'sales' etc).

Once you have defined an event you can select it from the drop-down list at the top of the form and then maintain the sub-events, areas and headings associated with the event.

Notice that you can **View** the **Staff Allocation** planner for a week, a single day or for four weeks. For details of how you can define the properties of the **Daily** view see **Setup options** on page 209.

You can choose to show totals relating to staff pay on the planner. For instructions on how to activate this option see **Setup options** on page 209. The **Source for user totals** on the form above relates to these totals. Specify the source for the pay totals to be displayed.

17.2 Maintain events

Notice the **Event** section of the **Staff Allocation** planner, displayed below:

Event
 Event: RACEDAY
 A Raceday Template
 Date: 24/09/2007
 Maintain
 << < > >> Apply Event data

You can select an event to display on the planner using the **Event** drop-down list. The **Date** field will display the date to be displayed on the planner, which can be modified using the calendar button or the arrow buttons. The 'single' arrow buttons allow you to move a day backwards or a day forwards; the 'double' arrow buttons allow to move a week backwards or forwards. Click the **Apply** button to implement any changes you have made.

Click the **Maintain** button to display a form similar to the following:

| Code | Description | Start Date | End Date |
|----------|--------------------|------------|------------|
| AWARDS | Awards ceremony | 13/10/2008 | 27/10/2008 |
| CHARITY | Charity event | 20/10/2008 | 27/10/2008 |
| FOOTBALL | Football match | 03/11/2008 | 03/11/2008 |
| RACEDAY | A Raceday template | 23/10/2008 | 23/10/2008 |
| XMAS | Christmas party | 22/12/2008 | 22/12/2008 |

Buttons: Modify, Add, Delete, Copy, Print, Close

This form displays all events stored on the **Staff Allocation** planner. To add an event click the **Add** button and then define the name, description and start date for the event. You can also **Modify**, **Delete**, **Copy** or **Print** an event using this form.

Click the **Modify** button to display the following form:

Maintain event definition

Code: AWARDS
 Description: Awards ceremony
 Start date: 04/12/2007
 End date: 11/12/2007
 Postcode: Y090 4DF
 OK
 Cancel

You can add details for the event on this form, as demonstrated above.

17.3 Set up sub-events

To set up sub-events first select the relevant event on the **Staff Allocation** planner, as demonstrated below:

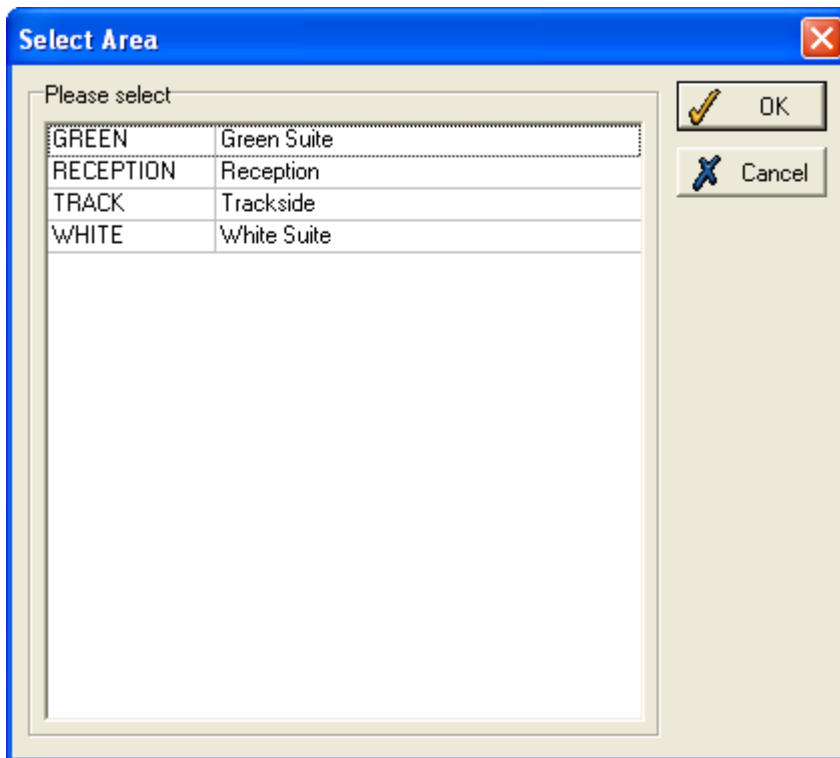
17.3.1 Set up Areas

Next it is necessary to set up 'Areas', representing physical parts of the site at which the event will take place. To do this, click the **Maintain** button in the **Area** section of the **Staff Allocation** planner. A form similar to the following should be displayed:

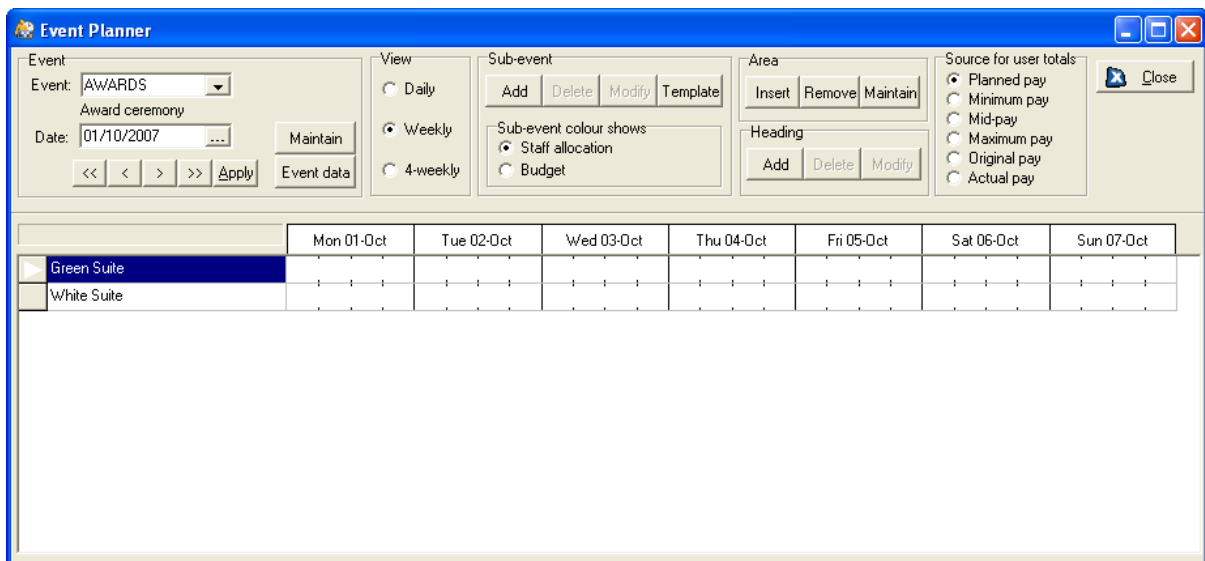
| Code | Description |
|-----------|-------------|
| GREEN | Green Suite |
| RECEPTION | Reception |
| TRACK | Trackside |
| WHITE | White Suite |

Buttons: Modify, Close, Print, Find Use, Rename, Help

This form displays all areas on the site. To add a new area click the **Modify** button. When you have defined area codes, you can add an area to the event by clicking the **Add** button in the **Area** section of the **Staff Allocation** planner. The following form will be displayed, allowing you to select an area to display:

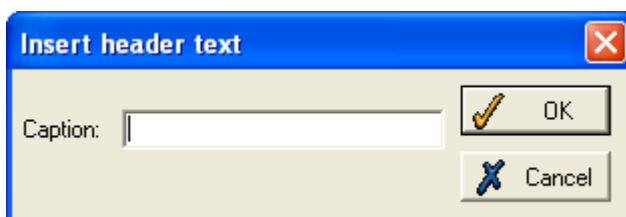


Select the relevant areas and then click **OK**. The areas will be displayed on the planner as follows:



17.3.2 Set up Headings

You can add custom headings to the **Staff Allocation** planner to help you organise the display of the sub-events. To add a heading click the **Add** button in the **Heading** section on the planner. The following form will be displayed, allowing you to define your own heading:

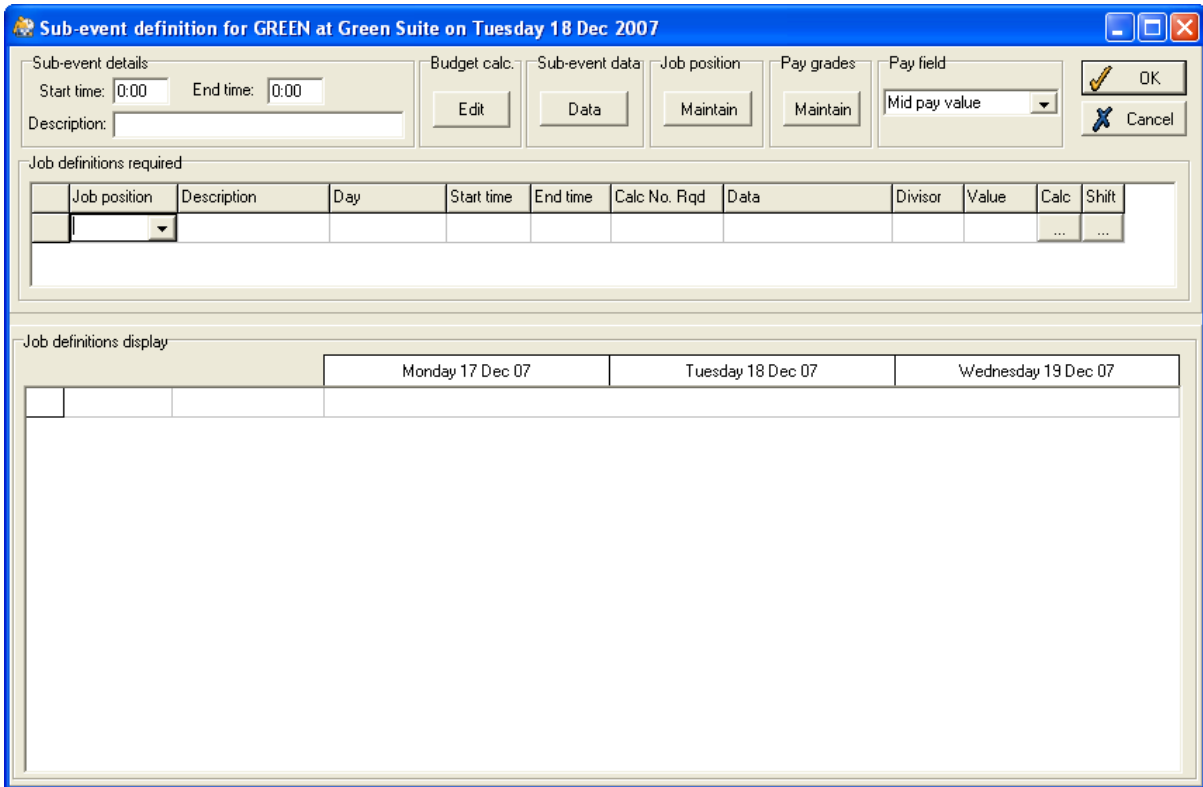


When you have inserted the text click **OK** and the heading will be displayed on the planner as follows:

17.3.3 Add sub-events

You can now add sub-events to the event on the planner. Click in one of the vacant white boxes on the planner and click the **Add** button on the **Sub-event** section. The following form should be displayed:

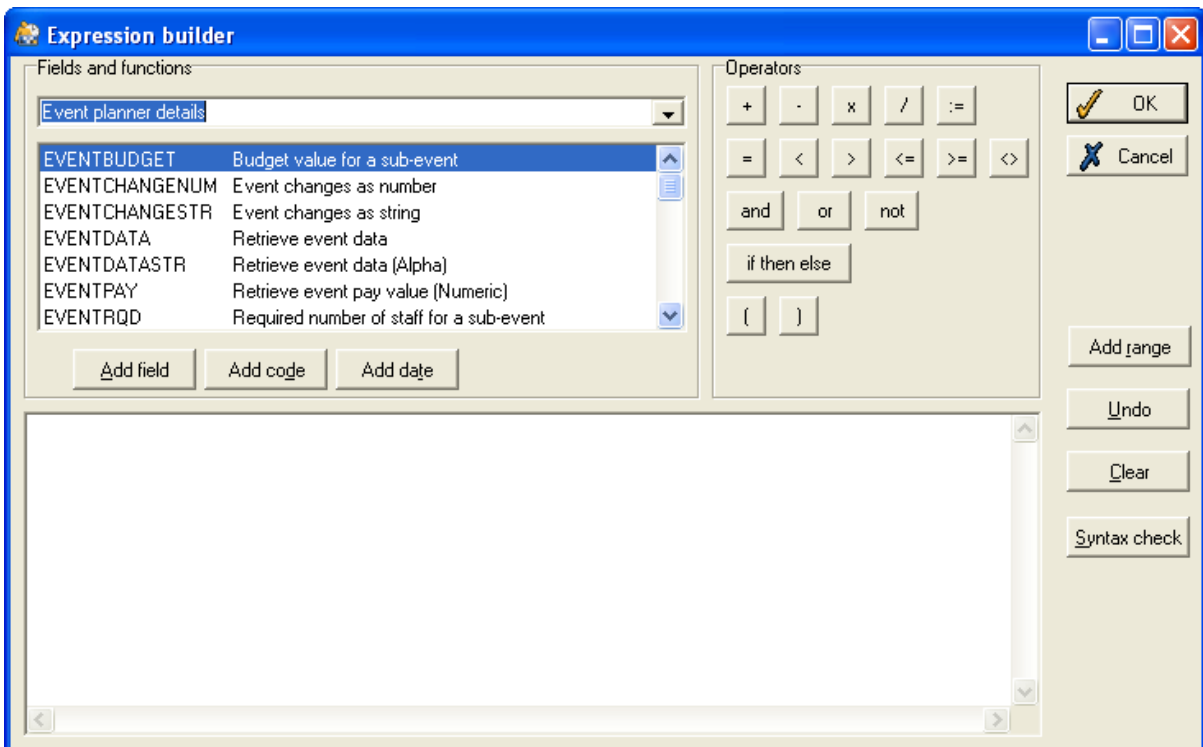
This form allows you to select what type of sub-event to add to the planner. You can choose assign the sub-event to an existing area code or a new area code. If you select **New code**, an extra field is displayed allowing you to define and describe the new area. You can specify whether the sub-event will take place on a **Single** date or over a **Range** of dates. You can also specify whether the sub-event is to be based on an existing template, by using the drop-down list at the bottom of the form. For more details see **Sub-event templates** on page 202. Click **OK** to open a form similar to the following:



Firstly, you can define the start and end times for the sub-event.

Budget calculation

Click the **Budget calculation Edit** button to display the following form:



You can use the above form to define a budget for the sub-event. Select **Event planner details** from the **Fields and functions** drop-down list and then use the Expression builder to define an appropriate budget.

Maintain job positions

Click the **Job position Maintain** button on the sub-event form to display a form similar to the following:

| Code | Description | Duties | Number of interviews | Pay grade |
|--------|-------------|--------|----------------------|-----------|
| CLEAN | Cleaners | | | 0 HOUR |
| COOK | Cook | | | 0 HOUR |
| WAITER | Waiter | | | 0 HOUR |

This is a list of all job positions defined within the system. To amend the list click the **Modify** button.

Maintain pay grades

Click the **Maintain pay grades** button on the sub-event form to display a form similar to the following:

| Code | Description | Period | ScaleMax | ScaleMid | ScaleMin |
|------|-------------|--------|------------|------------|------------|
| HOUR | Hourly | H | 100.0000 | 10.0000 | 0.0000 |
| WAGE | Annual wage | A | 20000.0000 | 15000.0000 | 10000.0000 |
| WEEK | Weekly | W | 2000.0000 | 1000.0000 | 600.0000 |

This is a list of all pay grades defined within the system. To amend the list click the **Modify** button.

Apply job positions to sub-event

When you have job positions defined on your system you can add job definitions to your sub-event. Note the example below:

Sub-event definition for GREEN at Green Suite on Tuesday 18 Dec 2007

Sub-event details: Start time: 9:00 End time: 17:30 Description: Buffet

Budget calc.: Sub-event data: Job position: Pay grades: Pay field: Mid pay value

Buttons: Edit, Data, Maintain, Maintain, OK, Cancel

| Job position | Description | Day | Start time | End time | Calc. No. Rqd | Data | Divisor | Value | Calc | Shift |
|--------------|-------------|---------|------------|----------|---------------|------|---------|-------|------|-------|
| CLEAN | Cleaners | Current | 12:00 | 19:30 | By value | | | 3 | | |
| COOK | Cook | Current | 7:00 | 15:30 | By value | | | 0 | | |
| WAITER | Waiter | Current | 8:00 | 17:30 | By value | | | 0 | | |

Job definitions display

| | | Monday 17 Dec 07 | Tuesday 18 Dec 07 | Wednesday 19 Dec 07 |
|--------|----------|------------------|-------------------|---------------------|
| CLEAN | Cleaners | | | |
| COOK | Cook | | | |
| WAITER | Waiter | | | |

You can use this form to specify the job positions that will be involved in the sub-event. You can define the **Start time** and **End time** for each job position. Under the **Calc No. Rqd** column you can choose to calculate the number of each job position required either **By value** or **By calculation**. If you have chosen **By calculation** you can click on the **Calc** column to access a button and then the expression builder form will open.

The **Job definitions display** section of the form above allows you to preview how the sub-event will appear on the main **Staff Allocation** planner form.

17.3.4 Sub-event custom data

Click the **Sub-event data** button to display the following form:

| Description | Value |
|-------------|-------|
| | |

OK

Cancel

Definition

This form allows you to define custom data for the sub-event. For an explanation of how to use this form see **Custom event data** on page 201.

When you have defined the sub-event, click **OK** and then the sub-event will be displayed on the planner as follows:

| Mon 03/12/2007 | Mon 03-Dec | Tue 04-Dec | Wed 05-Dec | Thu 06-Dec | Fri 07-Dec | Sat 08-Dec | Sun 09-Dec |
|----------------|------------|------------|------------|------------|------------|------------|------------|
| Food | | | | | | | |
| Green Suite | | | | | | | |
| White Suite | | | | | | | |

Area: Green Suite
 Desc: Food Sales
 Start: 03/12/2007 09:00:00
 Finish: 03/12/2007 17:30:00
 Status: Under allocation

If you hover the cursor over the sub-events, a pop-up box will appear, as demonstrated above. The colour of the sub-event will depend on your **Setup options** (see page 209 for details) You can set up different colours to represent whether the sub-event has been under-allocated, correctly-allocated or over-allocated staff. Notice the option in the **Sub-events** section of the planner, displayed below:

Sub-event colour shows

Staff allocation

Budget

This allows for a second option: the sub-event colour can also indicate whether the sub-event is under budget, on budget or over budget.

17.3.5 Drag and drop sub-events

You can also drag and drop sub-events around the **Staff Allocation** planner. Notice the following section at the bottom of the planner:

Message log

Drag mode

Move

Copy

Drag action

Subevent only

Subevent with staff

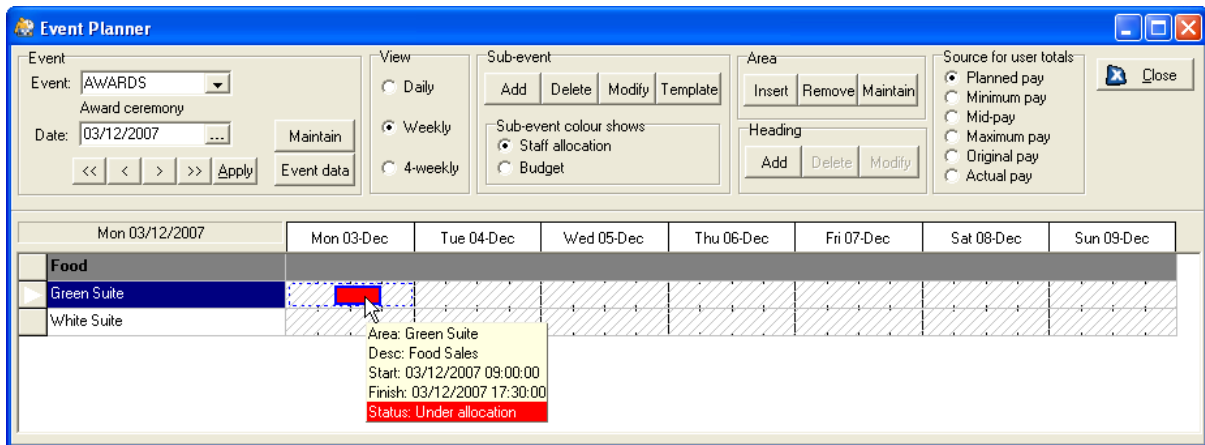
Drag mode: you can define the result of dragging and dropping a sub-event across the planner. You can either simply move the sub-event around the planner, or you can copy the sub-event as you drag and drop.

Drag action: you can specify whether you drag and drop just the sub-event or the sub-event along with the corresponding staff members.

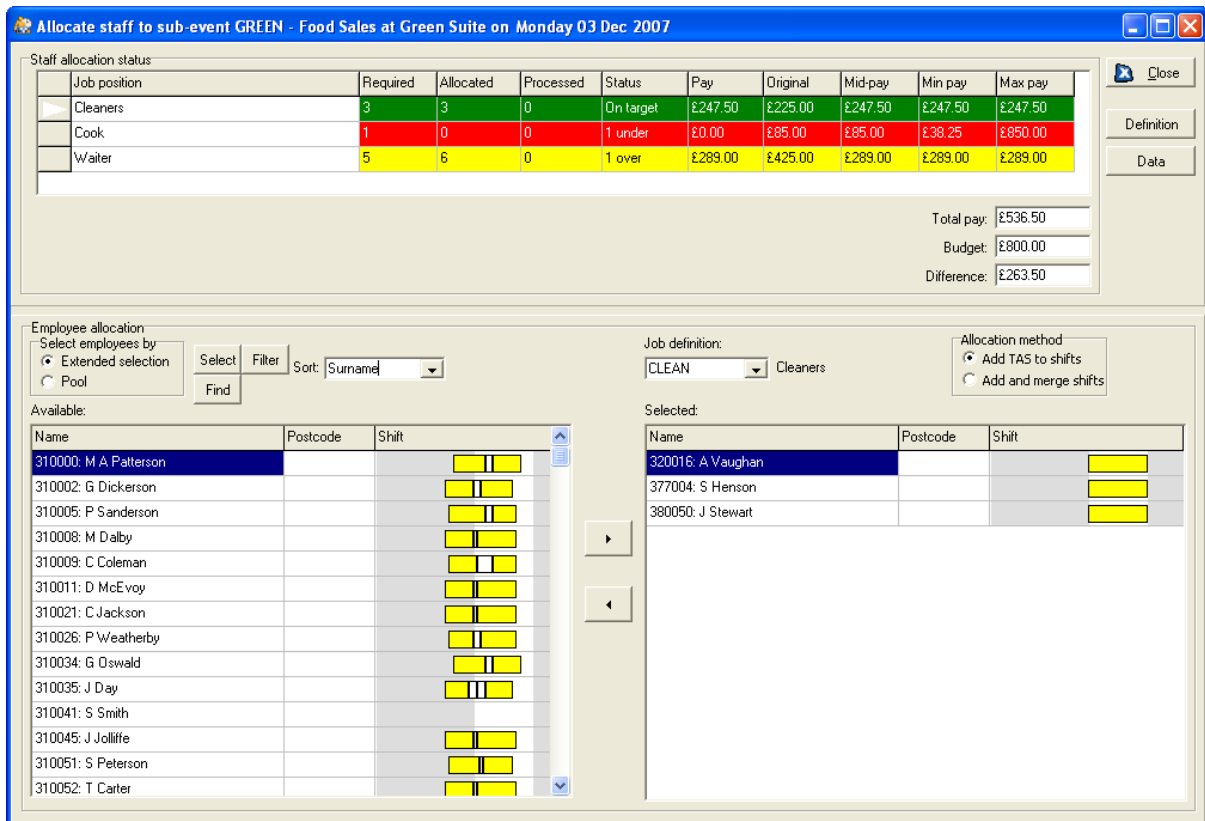
Message log: This will keep a record of your drag and drop actions.

17.4 Staff allocation

Select the relevant event in the **Staff Allocation** planner and double click on a sub-event as demonstrated below:



A form similar to the following should be displayed:



This form allows you to assign staff to the sub-event. The **Definition** button allows you to view edit the sub-event details and the **Data** button allows you to view and edit custom data for the sub-event.

17.4.1 Staff allocation status

This section of the form above shows you whether enough staff have been assigned to the sub-event. In the above example, there are enough cleaners, but a cook is needed and there are too many waiters assigned to the sub-event.

Staff pay details are also displayed in this section of the form above. This is based on the pay details of the staff members involved. Choose a relevant staff member, open their **Employee details** (see page 49 for details) and select the **Pay details** tab to display the following details:

| | | | | |
|---|--------------------------------------|--|---|--|
| Grade: <input type="text" value="HOUR"/> | Type: <input type="text" value="H"/> | Min: <input type="text" value="4.50"/> | Mid: <input type="text" value="10.00"/> | Max: <input type="text" value="100.00"/> |
| Hourly | | | From: <input type="text" value="03/07/2000"/> | |
| Pay: <input type="text" value="12.0000"/> | | | From: <input type="text" value="03/07/2000"/> | |

Ensure that the staff member is on a pay grade and that their **Pay** rate has also been defined. The system will then use these figures to calculate pay for staff members in the **Event planner**.

On the staff allocation form, the **Pay** column simply displays the total amount of money due to be paid to each set of staff; in the example above '£0.00' is displayed in this column alongside 'Cook' because a cook hasn't yet been allocated to the sub-event.

The **Original** column displays the anticipated amount of money due to be paid to each set of staff, before any actual employees are assigned to the sub-event. When setting up a sub-event you can allocate a pay grade to each job position and define the minimum, medium and maximum amount to be paid. For more details see **Maintain pay grades** on page 196. The system uses the medium pay figure to calculate a anticipated total pay for each set of staff at the event, according to how many staff are needed and the hours they are due to work.

The **Mid-pay**, **Min pay** and **Max pay** columns display a medium, minimum and maximum anticipated amount of money due to be paid to each set of staff, based on the same data as the **Original pay**. On the example above these columns are set to a fixed amount for cleaners and waiters because real employees have been assigned.

17.4.2 Allocate staff to the sub-event

The bottom half of the staff allocation form allows you to select existing employees on the TMS system and allocate them to vacant job positions within the sub-event. On the above example, employees 'A Vaughan', 'S Henson' and 'J Stewart' have been added as 'Cleaners' to the sub-event. You can only assign employees who have no shift on the relevant day, or throughout the relevant period. The coloured boxes in the **Employee allocation** list indicate that the employees are already assigned to a shift. When you have identified a relevant employee, use the arrow button to assign them to the job position for the sub-event.

Note: the **Filter** button above the **Employee allocation** list allows you to filter the selection of employees at your disposal. Click the button to open the following form:

Tick the **Filter active** boxes to make these fields editable. This form allows you to filter employees into the event planner, according to a certain field value or their skills.

17.5 Custom event data

Click the **Event data** button on the main **Staff Allocation** planner to display a form similar to the following:

| Description | Value |
|------------------------------|---------|
| People Expected at Gate | 5000.00 |
| People who have booked lunch | 2135.00 |

You can use this form to store custom data for the event. In the above example, 5000 people are expected to attend the event and 2135 of those people have booked lunch at the event. Click the **Definition** button to display a form similar to the following:

| Code | Description | Scope | Data type | Lookup | Global |
|--------------|-------------------------------|-------|-----------|--------|-------------------------------------|
| ▶ ATTENDANCE | Attendance | Event | Integer | | <input checked="" type="checkbox"/> |
| CAR | People who have reserved car | Event | Integer | | <input type="checkbox"/> |
| GATE | People expected at front gate | Event | Integer | | <input type="checkbox"/> |
| LUNCH | People who have booked lunch | Event | Integer | | <input type="checkbox"/> |
| | | | | | <input type="checkbox"/> |

You can define and maintain custom event data using this form. For example, you might wish to store the attendance of an event, the number of people who have reserved car parking spaces, the number of people who are expected at the gate or the number of people who have booked lunch, as demonstrated on the form above. The **Scope** column specifies whether the data is stored with event or sub-event details, depending on the scope of the relevant information. Note that you can also assign the value of a particular **Lookup** to the event. The **Global** column allows you to specify whether or not the data is applicable to all new events; if the data is 'global' it is applied by default to every event in the system. To add or delete codes from this list, use the relevant buttons or left-click in the left-hand column of the form to display the following option:

17.6 Sub-event templates

Notice the **Sub-events** section of the **Staff Allocation** planner, displayed below:

Before you set up actual sub-events, it might be useful to define a sub-event template. This will allow you to set up sub-events quickly based on a pre-defined set of rules. To set up a sub-event template click the **Template** button on the form above. A form similar to the following should be displayed:

| Template name |
|-------------------|
| Bar sales |
| Catering sales |
| Merchandise sales |
| Security |

This form contains all of the templates defined in your system. You can use the buttons to **Modify**, **Add**, **Delete**, **Rename**, **Copy** or investigate the **Usage** of, any of these templates.

If you click the **Add** button you will need to enter a name for the new template, and then the following form will be displayed:

Sub-event details

Description:

Budget calc.

Job position

Pay grades

Pay field: Mid pay value

Job definitions required

| Job position | Description | Day | Start offset | End offset | Calc No. | Rqd | Data | Divisor | Value | Calc | Shift |
|--------------|-------------|-----|--------------|------------|----------|-----|------|---------|-------|------|-------|
| | | | | | | | | | | ... | ... |

Test template

Start time: End time:

Job definitions display

| | Tuesday 11 Dec 07 | Wednesday 12 Dec 07 | Thursday 13 Dec 07 |
|--|-------------------|---------------------|--------------------|
| | | | |

This form allows you to define the rules which apply to a sub-event. It is very similar to the **Sub event definition** form described in **.Set up sub-events** on page 192. You can enter a **Description** for the sub-event template in the field at the top of the form.

17.6.1 Apply job positions to template

When you have job positions defined on your system you can add job definitions to your sub-event. Note the example below:

Sub-event definition for template - CATERING

Sub-event details: Description: Budget calc.: Job position: Pay grades: Pay field:

Job definitions required

| Job position | Description | Day | Start offset | End offset | Calc No. Rqd | Data | Divisor | Value | Calc | Shift |
|--------------|-------------|-----|--------------|------------|----------------|------|---------|-------|------|-------|
| CLEAN | Cleaners | N/A | 3:00 | 2:00 | By value | | | 3 | | |
| COOK | Cook | N/A | -2:00 | -2:00 | By value | | | 1 | | |
| WAITER | Waiter | N/A | -1:00 | 0:00 | By calculation | | | 0 | | |

Test template
Start time: End time:

Job definitions display

| | | Sunday 09 Dec 07 | Monday 10 Dec 07 | Tuesday 11 Dec 07 |
|--------|----------|------------------|------------------|-------------------|
| CLEAN | Cleaners | | | |
| COOK | Cook | | | |
| WAITER | Waiter | | | |

You can use this form to specify the job positions that define the sub-event template. You can define the **Start offset** and **End offset** for each job position. In the above example the cleaners should turn up 3 hours after the start of the sub-event and should stay until 2 hours after the event has finished, whereas the cook should arrive for work 2 hours before the event has started and is then free to leave 2 hours before the event ends. Under the **Calc No. Rqd** column you can choose to calculate the number of each job position required either **By value** or **By calculation**. If you have chosen **By calculation** you can click on the **Calc** button and the expression builder form will open.

The **Test template** section of the form above allows you to preview how the sub-event will appear on the main **Staff Allocation** planner form. To activate the **Test template** enter a prospective start and end time for the sub-event in the appropriate boxes.

17.7 Staff allocation options

Right click anywhere within the **Staff Allocation** planner and the following menu will be displayed:

| |
|---|
| Delete sub-event |
| Insert area |
| Remove area |
| Add heading |
| Show original estimate breakdown |
| Show planned pay breakdown |
| Show actual pay breakdown |
| Print Roster |
| Run reports |
| Mass allocate |
| Mass de-allocate |
| Setup |
| Recalculate shifts on selected subevent |
| Recalculate shifts on all subevents |

The first few options on the above menu allow you to edit the appearance of the **Staff Allocation** planner in various ways.

17.7.1 Show original estimate breakdown

Click this option on the right-click menu to display the original estimated pay breakdown for each employee assigned to the sub-event. The form that appears works in an identical way to the show pay breakdown form explained below.

17.7.2 Show planned pay breakdown

Click the **Show planned pay breakdown** option on the above menu to display a form similar to the following:

The screenshot shows a window titled "Pay Breakdown" with a table of employee pay data. The table has 13 columns: Employee, Date, Area, Job position, Pay unit, Basic rate, Hours code, Multiplier, Pay rate, Hours, Pay, and Pay after calc. The data is as follows:

| Employee | Date | Area | Job position | Pay unit | Basic rate | Hours code | Multiplier | Pay rate | Hours | Pay | Pay after calc |
|-------------------|------------------|-------|--------------|----------|------------|------------|------------|----------|-------|--------|----------------|
| 320016: A Vaughan | 04/12/2007 12:00 | GREEN | CLEAN 1 | Hourly | 11 | BH | 1.00 | 11.00 | 7:30 | 82.50 | 82.50 |
| 377004: S Henson | 04/12/2007 12:00 | GREEN | CLEAN 2 | Hourly | 10 | BH | 1.00 | 10.00 | 7:30 | 75.00 | 75.00 |
| 380050: J Stewart | 04/12/2007 12:00 | GREEN | CLEAN 3 | Hourly | 12 | BH | 1.00 | 12.00 | 7:30 | 90.00 | 90.00 |
| 400001: T Wently | 04/12/2007 09:00 | GREEN | WAITER 1 | Hourly | 12 | BH | 1.00 | 12.00 | 8:30 | 102.00 | 102.00 |
| 400002: L Jackson | 04/12/2007 09:00 | GREEN | WAITER 2 | Hourly | 10 | BH | 1.00 | 10.00 | 8:30 | 85.00 | 85.00 |
| 400003: D Lillee | 04/12/2007 09:00 | GREEN | WAITER 3 | Hourly | 5 | BH | 1.00 | 5.00 | 8:30 | 42.50 | 42.50 |
| 410015: G Parks | 04/12/2007 09:00 | GREEN | WAITER 4 | Hourly | 7 | BH | 1.00 | 7.00 | 8:30 | 59.50 | 59.50 |

Total: £536.50

This form shows a breakdown of the planned pay for each employee. The cells of the table will be coloured differently according to whether they are fixed, editable or have been changed. To instructions on how to change these colours see **Setup options** on page 209.

Click the **Columns** button to display the following form:

This option allows you to select what details are included in the **Pay Breakdown**. Select or remove columns using the arrow buttons in the centre of the form.

Click the **Filter** button on the **Pay breakdown** form to display the following form:

To access the filter tick the **Filter active** box at the top of the form. This form allows you to filter the information displayed on the **Pay breakdown** form. You can use the drop-down lists to view information relating to certain fields, areas or job positions. On the example above, the user has chosen to view the pay breakdown for an employee with the surname 'Wenty'.

17.7.3 Show actual pay breakdown

Click this option on the right-click menu to display the actual pay breakdown for each employee assigned to the sub-event. The form that appears works in an identical way to the planned pay breakdown form explained above.

17.7.3 Mass allocate

This option allows you to mass allocate staff to sub-events. Click the **Mass allocate** option on the right-click option to display the following form:

Mass allocate employees

Allocate Emp's to sub events between: 10/11/2008 and 10/11/2008

Sub-event: FUNCTION (Function Room)
Job position: CLEANER

| Date | Area | Job | Include |
|-------------------------|----------|---------|-------------------------------------|
| Monday 10/11/2008 09:00 | FUNCTION | CLEANER | <input checked="" type="checkbox"/> |

You can choose to allocate employees to sub-events within a specified date range. Use the calendar buttons to define the desired date range. You can also specify to which **Job position** employees will be allocated. The List at the bottom of the form will list all job positions within the specified date range; you can then choose whether to **include** all of the job positions available. When you have added the necessary details click the **OK** button to display a form similar to the following:

Select employees to mass allocate

Select employees by: Extended selection Pool

Number required on 04/12/2007: 0/3

Available: 96 Sort: Surname

| Name | Cost | Postcode |
|-----------------------|---------------|----------|
| 310000: M A Patterson | £0.00 / Hour | |
| 310002: G Dickerson | £0.00 / Hour | |
| 310005: P Sanderson | £0.00 / Hour | |
| 310008: M Dalby | £15.00 / Hour | |
| 310009: C Coleman | £0.00 / Hour | |
| 310011: D McEvoy | £0.00 / Hour | |
| 310021: C Jackson | £0.00 / Hour | |
| 310026: P Weatherby | £0.00 / Hour | |

Selected: 0

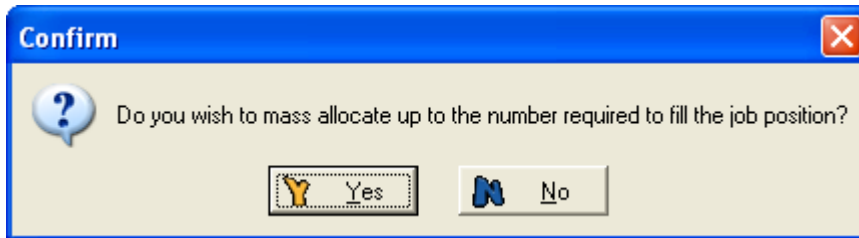
| Name | Cost | Postcode |
|------|------|----------|
| | | |

| Emp name | Area | Start time | End time | Job Position | Status | Assign |
|----------|------|------------|----------|--------------|--------|--------------------------|
| | | | | | | <input type="checkbox"/> |

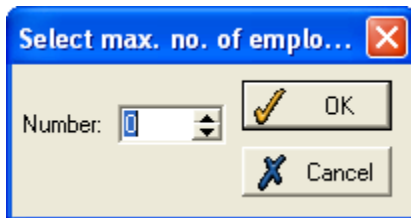
This form allows you to select the employees to be mass-allocated to sub-events. **Available** employees are shown on the left-hand side of the form and **Selected** employees are shown on the right-hand side. You can specify which employees will be displayed in the **Available** box by using the **Select** button. To select an employee for allocation, use the arrow buttons to move him/her into the **Selected** box. For more details of how to use this form see **Select available items** on page 31.

Note that the number of employees required to fill the job position in question and the number who have already been selected are displayed at the top of the form. In the above example 0/3 employees have been allocated and 0 have been selected.

Click the **Mass** button and the following confirmation message will be displayed:

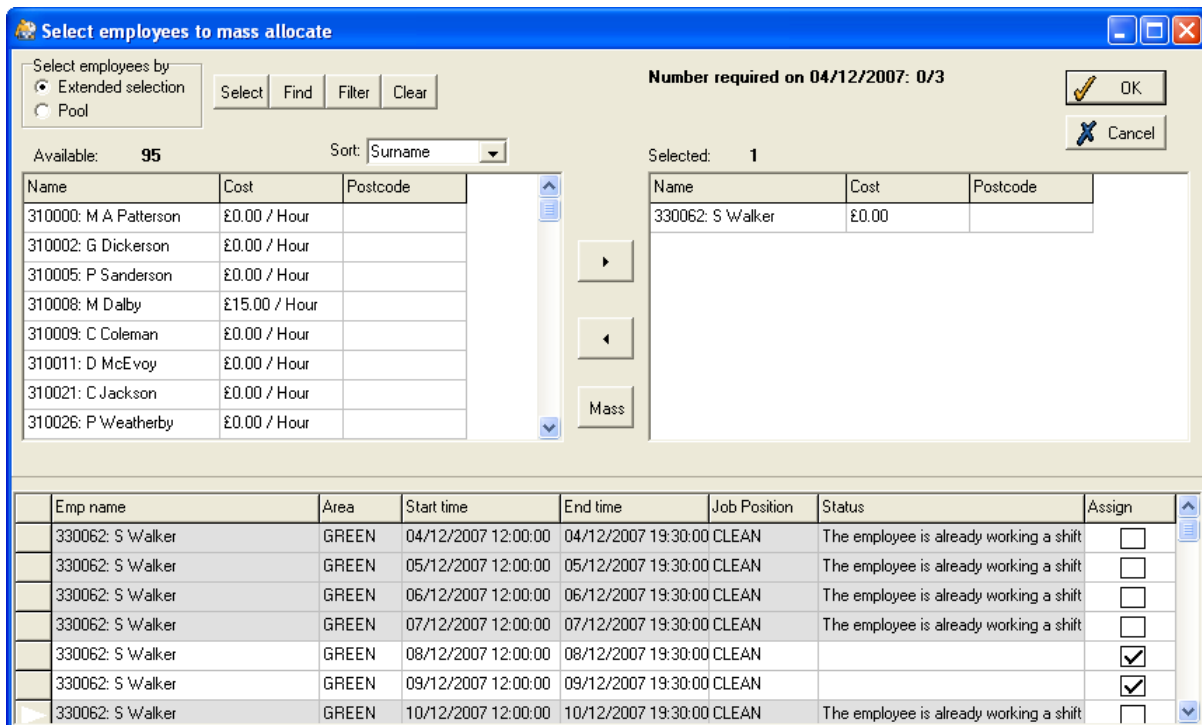


If you are happy to mass allocate employees up to the number required to fill the job position, click **OK**. If you wish to change the maximum number of employees that can be mass-allocated click **No** and the following form will be displayed:



Enter a maximum number of employees to be mass allocated and then click **OK**.

Once you have selected employees to be mass-allocated, their details will appear in the bottom half of the form, as follows:



The bottom half of the form above displays the availability of the selected employees throughout the specified date range. Tick the **Assign** box to assign the employee to the relevant sub-event on that day. The days will appear different colours according to the employee's availability. If the employee is available the day will appear white; the day will appear grey if the employee is already due to work a

shift; the day will appear pink if the employee has been assigned to work and they are already due to work a shift; and the day will appear red if the employee has already been allocated to an sub-event on that day. In the example above employee 'S Walker' has been mass allocated to work as a cleaner from 04/12/2007 to 10/12/2007. However, she is due to work a shift on all these days apart from the 8th and 9th so she can only be assigned to sub-events on these days.

Note: you can reverse this process by selecting the **Mass de-allocate** option on the **Staff Allocation** planner menu.

17.7.4 Setup options

Click **Setup** on the right-click menu and the following form should be displayed:

This form displays the setup options for the **Staff Allocation** planner:

Allocation status: you can define the colour of sub-events on the planner that are either under allocated, correctly allocated according to targets, over allocated, or can't be edited. Click on the coloured boxes in order to alter the colour.

Budget: you can define the colour of sub-events on the planner that are either under budget, correctly budgeted or over budget.

Miscellaneous colours: you can define the colour of headers on the **Staff Allocation** planner.

Pay breakdown colour: you can define the colours of the grid fields on the pay breakdown form, to indicate whether fields are editable or changed. For more details see **Show planned pay breakdown** on page 205.

Totals: click the Modify button to select which totals are displayed on the Event Planner main form.

Miscellaneous display options: you can define the properties of the **Daily view** on the **Staff Allocation** planner.

Drag actions: these options allow you to define what happens when you drag and drop sub-events on the **Staff Allocation** planner. For more details see **Drag and drop sub-events** on page 198.

Allocation screen fields: you can define the properties of the **Staff allocation** form. For more details see **Staff allocation** on page 190.

18 Shift setup

18.1 Maintain shifts

There are two ways of setting up shifts - on the **Future Work Planner** (see page 154), and on the **Maintain shifts** page:

Open the **System** menu and select **Maintain shifts**:

| Shift Code | Description |
|------------|-------------------------|
| AVAIL | Available for work |
| COMPTEST1 | Complex Day |
| COMPTEST2 | Complex 2 |
| FACTDAY | Day Factory |
| FACTLATE | Late Factory |
| FACTNIGHT | Early Factory |
| FACTNMD | Factory Non Mandatory 1 |
| FACTNMN | Factory Non Mandatory 2 |
| FLEXDAY | Daytime Flex |
| FLEXNIGHT | Nighttime Flex |
| MANFLXST | Flexible Start Managers |
| NOCORE | No Core |

Buttons: Modify, Add, Delete, Rename, Usage, View, Close, Print

Work rules for display/test: SHOP (dropdown), Weekly Shop Staff

Date for display/test: 07/05/2007 (calendar icon)

This form displays all previously defined shifts (apart from personalised ones). To amend any of these, select one and click **Modify**. Shifts can be tested against different clockings and work rules to see what hours and anomalies would be calculated by the shift on particular days. It is useful to test any new shifts before they are used 'live'.

18.1.1 Add a new shift

If you wish to add a new shift, first select a set of work rules in the **Work rules for display/test** box. This set of work rules will affect the default rules of the new shift.

In a way, the set of work rules that is selected in the display/test field will act as a template for the new shift, although you are able to change any rules in the shift on the **Work shift** form.

Once you have selected the required work rules, click the **Add** button. The following box appears:

Select: <not defined>

Buttons: OK, Cancel

Enter a unique name for the shift and click **OK**. This produces the **Work shift** form, on which you should enter all details of the shift.

18.2 Work shift form

A form like this is used whether you are setting up a shift from the **Future Work Planner** or from the **Maintain shifts** page:

The shift details that you need to define are the same whichever method you are using:

Description

It is recommended that you enter a description before setting up any details of the shift. The description should make it clear what type of shift it is, to make it easier to identify later on (e.g., 'Dayshift', 'Nightshift', '9.00-17.00').

Change start or end times

The **Control times** section displays the limits of a standard shift (**Start of workday** and **End of workday**), and the limits within which employees can work overtime (**Earliest start** and **Latest finish**). In the example shown above, the shift is from 8:00 to 16:30, but employees can start as early as 6:00 and finish as late as 18:30 should they be working overtime.

Edit any of these limits by typing the new times into the boxes, or by using the **Time display** bar at the bottom of the form. In the example below, the light blue bar shows time paid at the basic hours rate, and the dark blue sections show time paid at an overtime rate. To move the shift back or forward, without altering its length, click within the shift and drag to its new times. To lengthen or shorten the shift, click on one of the ends of the shift, so that the cursor changes to a 'resize' image, as shown below, and drag to the required start or end time.

The **Standard hours** box displays the number of hours to be worked in a standard shift (from the times set as **Start of workday** and **End of workday**). This also takes into account the length of any breaks that have been defined (see below).

Mandatory working day

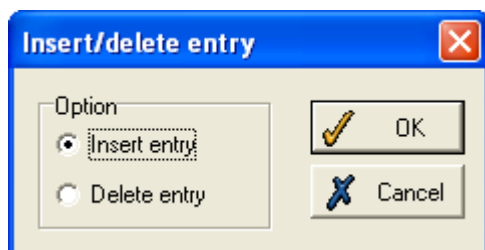
If the employee is not required to come into work on this shift, then ensure that the **Mandatory working day** box is not ticked. This is particularly useful when setting up non-working days on which the employee is permitted to come in to work overtime. Because employees are not required to work, there is no standard shift, which means that in the **Control times** section, details can only be entered for **Earliest start** and **Latest finish**.

Available for Work day

If the employee is not required to work this shift, but is available, tick the **Available for work day** box. This is particularly useful for assigning a pool employee to a shift before changing it to a working day shift prior to adding any TAS clockings. Because this is a shift which only indicates when an employee is **available** for work, the only information which needs entering for this type of shift is the earliest start time and latest finish time. By default, **Available for work** days are shown as a different colour in the planner tab.

Work breaks

Enter any breaks to be taken throughout the day by clicking on the white arrow to the left of the **Work breaks** table, to display this box:



Select **Insert entry**, and click **OK**, and a new row will appear in the table, where it can be edited.

On the Work shift form above, the employee must take a break of thirty minutes, starting between 12:00 and 12:30. To modify these details, enter the new times and length in the boxes.

If the **Pay rate** column is blank, it means that the break is unpaid. When a break is unpaid, the duration of the break is deducted from the overall length of the shift in calculating the **Standard hours** figure. If the break is to be paid, select the relevant pay rate from the drop-down list. The duration of paid breaks is not deducted from the length of the shift for the **Standard hours** calculation.

Tick the **Reqd** box if the break is compulsory. Any breaks that are not compulsory will not affect the **Standard hours** calculation.

Work rules

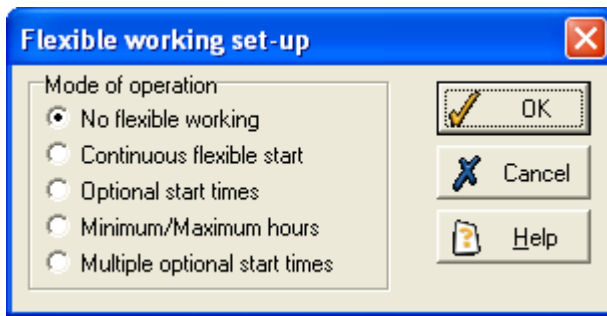
The boxes at the top of the form allow you to change the profiles, or work rules, to be applied to this shift. By default, whether you are editing an existing shift or creating a new one, these options will be set to the rules of the profile which the employee is on. Amending them will only affect the current shift, and not the general profile. For details of most of these buttons, see **Work rules** on page 218.

However, some buttons appear only on the **Work shifts** form above.

The Flex button

(Note that this is not the same as working on flextime rules, which must be set up in a different way - see **Work rules** on page 218).

If you operate a flexible working day, employees can be more flexible about when they start and finish the shift. Clicking the **Flex/Name** button allows you to define the flexible working set-up.



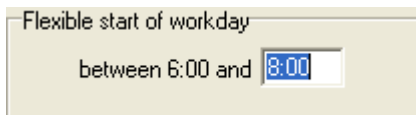
Select the type of flexible working that should be permitted on the shift:

No flexible working

No flexible working is allowed on this shift.

Continuous flexible start

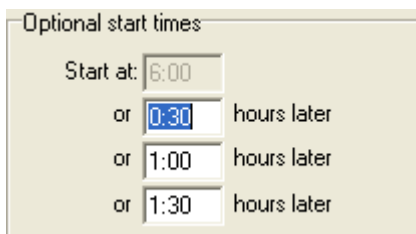
Employees can start work at any time within a set limit, as long as they work the specified number of standard hours. This box should be used to enter the latest time when an employee can start:



In this example, 6.00 is the original start time of the shift, but the employee can start at any time between 6.00 and 8.00 without an anomaly being generated.

Optional start times

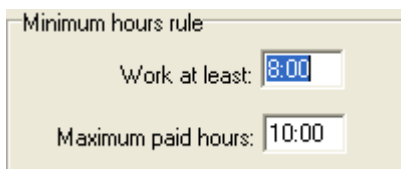
Employees can be given up to three optional start times after the normal start time. The interval between the standard start time and the optional times should be entered in the boxes. Whenever they do start, employees are still expected to work the specified number of standard hours.



In this example, the employee can start at 6.00, 6.30, 7.00 or 7.30.

Minimum/Maximum hours

Enter in the boxes the minimum number of hours the employee must work (usually the standard hours), and the maximum number that he or she can work in a day and be paid for.



In this example, the employee must work between 8 and 10 hours in a day. If he or she works more than 10 hours, the additional time will not be paid.

Multiple optional start times

This is similar to **Optional start times**, but you can allow more possible start times.

Multi optional start times

Start at: 6:00

or 0:30 hours later

for 5 occurrences

In this example, the employee could start work at 6.00, 6.30, 7.00, 7.30, 8.00 or 8.30. Again, he or she is still expected to work the specified number of standard hours.

The Alternatives button

It is possible to set up a number of alternative shifts that an employee can work, instead of the one assigned to him or her on the roster. This feature is particularly useful if the employee works rotating shifts (e.g., mornings, afternoons and nights). TMS will then check the employee's clockings and match them to the nearest shift specified in the **Alternative** shifts list.

Normally, if an employee switches to a different shift without first registering the change with the system, TMS will generate anomalies, meaning the supervisor must check the anomalies and authorise the changes. By specifying alternative shifts, the supervisor can save time by removing the number of anomalies that will need checking in future.

To define the alternative shifts (i.e., the other possible shifts that the employee could work) click on **Alternatives** to display a table like this:

Alternative shifts

| Alternative | Description |
|-------------|------------------|
| NIGHT | Night time shift |
| | |
| | |

OK

Cancel

Print

Help

In this example, the rostered shift is a day shift, but the employee assigned to this shift has the alternative of working the night shift shown here.

To enter alternatives to the rostered shift, click within the **Alternative** column. This allows you to produce a drop-down list, containing all named shifts in your system, from which you should select the required shift. More than one alternative can be selected for a shift.

Click **OK** when you have selected all the alternatives for this shift.

Now, whenever an employee is assigned to this day shift, TMS will check the clockings to see whether the night shift is being worked instead.

You may also wish to allow the reverse to happen, i.e., allow an employee assigned to the night shift to work the day shift instead. Do this in the same way, by altering the work rules of the night shift.

The OT button

Click the **OT** button to set the defaults for overtime on this shift:

The screenshot shows a dialog box titled "Overtime". It has a blue title bar with a close button. The main content area is light beige. At the top left, there is a section titled "Minimum hours at lower rates" containing two rows of input fields. The first row shows "2:00" in a text box, "hours at" in a label, and "OT1" in a dropdown menu. The second row shows "2:00" in a text box, "hours at" in a label, and "OT2" in a dropdown menu. Below this section is a larger text box labeled "Pre-authorized overtime:" containing "0:00" and "(hours)". On the right side of the dialog, there are three buttons: "OK" with a checkmark icon, "Cancel" with an 'X' icon, and "Help" with a question mark icon.

In the **Pre-authorized overtime** box at the bottom, enter the maximum amount of overtime that an employee can work on this shift without an anomaly being generated. In this example, if an employee works more than four hours overtime in the shift, an anomaly will be recorded, which must be dealt with by the supervisor.

You should also set the **Minimum hours at lower rates**. This can be used to specify that an employee must work a certain number of hours at a lower overtime rate before being paid at a higher rate. In the example above, the first two hours of overtime worked by an employee will be paid at **OT1** (time and a half) and then the next two hours will be paid at **OT2** (double time).

The User button

Click the **User** button to display the following form:

The screenshot shows a dialog box titled "User fields for shift". It has a blue title bar with a close button. The main content area is light beige. It contains several sections: "Additional payments" with two checkboxes and a text box; "Display Day:" with a dropdown menu set to "C" and the text "Current day"; "Break budget:" with a text box set to "0:00"; and "Lookup value" with "Cross-ref code:" and a dropdown menu set to "0". On the right side of the dialog, there are two buttons: "OK" with a checkmark icon and "Cancel" with an 'X' icon.

This form can be used to record any additional information required about the shift. If used, it will have been set up by your system administrator, and will be specific to the requirements of your organisation.

The Test button

Clicking the **Test** button allows you to find out how the shift definition that has been set up will work under various circumstances. Enter clockings that employees may enter, and this form will show what anomalies would be generated by these clockings.

COMPLE: Complex Work Rule. - Work shift NORMAL for Mon 07-May-2007

| Day | Time | Dir | Parameters |
|-----|------|-----|------------|
| | | | |

Clockings:

Test Results

| Worked | | |
|--------|-------------|-------|
| Code | Description | Hours |
| | | |
| | | |

| Absence | | |
|---------|------------------|-------|
| Code | Description | Hours |
| U | Unauthorised abs | 7:30 |

Anomalies

Absence

Explanation of rules

- Apply breaks - Code: from 0:00 to 0:00
- Apply breaks - Code: from 12:00 to 12:30
- Apply standard hours from 9:00 to 0:00
- Apply standard hours from 0:00 to 12:00
- Apply standard hours from 12:30 to 17:00
- Unauthorised absence - Code: U full day
- Process special calculations

The Standard day button

This form is only available if the shift you are editing is a flextime shift. It allows you to set the limits of when employees can start and finish work:

Standard day ✖

Half day absence (if using shift times in Misc)

Standard day

Core times

✍ OK

✕ Cancel

Times

Time 1: Time 2:

Time 3: Time 4:

📖 Help

Keyed absence use

Core times

Standard day

From clocking until core end (Std Lunch)

From clocking until core end (Min Lunch)

From clocking until core end (Std day Lunch)

From clocking until standard day end (Std Lunch)

From clocking until standard day end (Min Lunch)

From clocking until standard day end (Std day Lunch)

18.3 Work rules

Select the **System** menu and then select **Maintain work rules**. A form similar to the following will be displayed:

Maintain work code ✖

| | |
|--------|------------------------|
| COMPLE | Complex Work Rule. |
| COMPLX | Complex Work Rule Test |
| COMPX | COMPX TEST |
| FACTOR | Factory Staff |
| FLEXEM | Office Flex |
| MANAGE | Manager Rules |
| SHOP | Weekly Shop Staff |

📄 Modify

✕ Close

➕ Add

🗑 Delete

🔑 Usage

👁 View

🖨 Print

Select a word code from the list and then click the **Modify** button to display the following form:

You can set the work rule as default by ticking the box at the top of the form.

18.3.1 Allowances

Click **Allowances** to define the flexible portions of an employee's start and finish times. This form is displayed:

The first panel allows you to enter the allowances for the **Normal workday**.

At the start of the day there is an **Allowed arrival time** and a **Lateness allowance**. The arrival time is the period before the normal start of the workday (before the employee is paid), when the employee can clock in for work without an anomaly being recorded. The lateness allowance is the period after the normal start of the workday, during which an employee may clock without a time penalty.

Similarly, at the end of the day, the **Early leaving allowance** is the time before the actual end of the shift during which the employee can leave with no penalty. The **Allowed departure time** is the period

after the shift finishes, during which an employee who clocks out will not be credited with any more than the scheduled shift.

A clocking within any of these limits is treated as if the employee clocked at the normal start or finish time, and will not record overtime or absence.

On the second panel, **Overtime**, the same allowances need to be defined, but you may wish to enter different values for overtime than for the normal workday.

The **Late break allowance** indicates how many minutes an employee is allowed to be late back from a break before being penalised.

For example, if the allowances above are applied to a shift starting at 9:00 and finishing at 17:00, with a lunch break from 12:00 until 12:30, the employee must:

- clock in between 8:30 and 9:03;
- take lunch between 12:00 and 12:33;
- clock out between 17:00 and 17:30.

This will generate a normal workday with no anomalies.

For an explanation of the **TAS variation** option at the bottom of the above form, see **Daily anomaly correction** on page 110.

18.3.2 Pay rates

Click the **Pay rates** button to set up the pay rate to be received by the employee at each time of the day. This table appears:

The three drop down lists allow you to specify different rates for **Before workday**, **During workday** and **After workday**. In this example, during the workday, employees are paid at basic hours. Before and after the workday, you may wish to specify that employees are paid time and a half or another appropriate rate.

Within each of the three periods, different rates can be applied for different times, so that, for example, during the workday, the employee may be paid at a higher rate in the morning than in the afternoon.

You can set rates for each day of the week via the tabs on the bottom of the form.

18.3.3 Premiums

Premiums are defined in the work rules by time of day, and day of week, for a full week. The tabs at the base of the form allow you to select the required day and the Between and Pay premium rate fields allow you to set the actual rates that will be applied between certain times.

These premium rates are simply extra worked hours categories that you can define. Although you could enter a basic or overtime category here, it is probably best to define separate categories for premiums.

18.3.4 Period hours

Click on the **Period hours** button to display the following form:

Period hours adjustments for profile AGE

Enable period hours adjustment

Reconciliation period

By week using roster

By week using start day of week

By period

OK

Cancel

Help

Basic hours code(s): BH ... (Minimum basic hours defined in roster)

| Code | Min hours |
|------|-----------|
| | |

(Reconciliation order defined in Maintain worked hours categories)

Hours promotion:
Relegate only

Apply update shift calculations after

This form allows you to define the minimum amount of hours to be worked for each hours code during the week or another period of work.

18.3.5 Rounding

Clicking the **Rounding** button allows you to specify the number of minutes clockings should be rounded to. You can set clockings to be rounded to the exact minute, or to any amount of minutes.

Separate rounding units may be defined for the normal workday and overtime periods. For example, time lost during the normal workday may be recorded to the exact minute (by setting the **Unit** in the **Normal workday** to '1') but overtime may be paid in completed 1 hour periods (the **Unit** in **Overtime** would be set to '60').

This form is displayed:

First, select one of the options in the **Round what** section: **Hours** or **Clockings**.

If you select **Hours**, then the total hours recorded by the clockings will be rounded (i.e. every clocking will be added together and the total lateness minutes etc. will be rounded according to the rounding rules). However, if you select **Clockings** then each individual clocking will be rounded before any hours totals are calculated. (**Clockings** is most commonly chosen.)

Then choose the **Unit** for clockings to be rounded to. On the above example, the **Unit** for the **Normal workday** is 15 minutes. This means that, for example, if an employee clocks in at 8:54, the clocking will be recorded as 9:00.

In the next two boxes, select the **Allowed lateness** for 'in' clockings and the **Allowed early leaving** for 'out' clockings.

The **Time allocation** section is only displayed if you are using the Time Allocation System (TAS). Time allocation is used, for example, to record when employees move between departments (or sites) and even though they are still working they are expected to clock to show which department they are in. As in the previous fields, if the unit is set to '1' in the time allocation **Unit** field, the employees' clockings will be recorded to the exact minute.

The **Round up by** box is used if any part of the rounding is in the employee's favour. For example, assume the employee normally starts at 9:00, with the **Normal workday Unit** set to 15, and the **Round up by** value set to 5. If the employee clocks in at 9:22 it would be treated as 9:30, but if they clock in at 9:18 it would be treated as 9:15.

There are special allowances for the start and end of the day - see **Allowances**, page 220, for details.

Rounding examples

An employee is working the following shift:

| | |
|---------------|-------------------------|
| 06:00 – 08:00 | (overtime 1) |
| 08:00 – 12:00 | (basic hours - morning) |
| 12:00 – 14:00 | (lunch break) |

| | |
|---------------|---------------------------|
| 14:00 – 17:00 | (basic hours – afternoon) |
| 17:00 – 18:00 | (overtime 2) |

| | |
|----------------------|----------------------------|
| Actual Clockings | Clocking calculated by TMS |
| in 7:35 out 16:58 | in 8:00 out 16:45 |
| in 8:09 out 17:25 | in 8:15 out 17:00 |

18.3.6 Flextime

You need to decide whether the profile is a flextime profile or not. Click the **Flex/Name** button. A form similar to the following should be displayed:

The screenshot shows a dialog box titled "Maintain work rule details". It has a blue header bar with a close button (X) on the right. The main area is light beige. On the left, there is a "Description:" label followed by a text input field containing "Complex Work Rule". Below this is a checkbox labeled "Flextime" which is currently unchecked. On the right side, there are two buttons: "OK" with a yellow checkmark icon and "Cancel" with a blue X icon.

This form allows you to apply flextime rules to a profile. If you do not wish to make the profile flexitime make sure that the **Flextime** box is not ticked. If you do wish to apply flexitime rules to the profile, tick the **Flextime** box to display information similar to the following:

The screenshot shows the same "Maintain work rule details" dialog box, but with the "Flextime" checkbox checked. The description field now contains "Standard profile". Below the checkbox, there is a section titled "End of period carryover rules" containing two input fields: "Maximum positive balance:" and "Maximum negative balance:", both set to "5:00". To the right of these fields is an "Edit extra info." button. At the bottom of the dialog, there is a text box with the following text: "Hours balances above the maximum positive at the end of the flex period will be lost. Hours balances below the maximum negative will be reported, but the balance figure will remain." The "OK" and "Cancel" buttons are still present on the right.

The **End of period carryover rules** enable you to define how many hours in a flex profile will be carried over to the next period (when a period end procedure is performed).

Maximum positive balance: hours balances above this value will be reported but not carried over to the next flex period (i.e. will not appear on the new balance).

Maximum negative balance: hours balances below this value will be reported and carried over to balance of the next flex period.

Any hours balances above the specified **Maximum positive balance** at the end of the flex period, will be lost; any hours balances below the specified **Maximum negative balance** will be reported but not added on to the balance figure.

Using the above carryover rules as an example, if an employee has a flex balance of 12 at the end of a period, when the period end procedure is performed, 5 hours will appear on the new balance and 7 hours will be reported but not carried over. If the same employee has a flex balance of -3, the hours will be reported but the flex balance will remain the same.

Click the **Edit extra info.** button to display a form similar to the following:

This form allows you to edit and store the period end flextime carryover figures for previous periods. The panels on the form above contain the flextime carryover figures for the previous nine periods. For example, if you wanted to allow employees to carry over extra flextime earned for one particular pay period, you could find and edit the figures on this form.

18.3.7 Anomalies

Click this button and then click the **Edit Anomalies** button to display the following form:

This form allows you to select which anomalies are actually reported on within TMS.

Call out: if an employee is called out to work at an irregular time, and the Processor has no shift to compare the clockings to, the employee is given a 'call out' anomaly.

18.3.8 Special days

You can enter 'special days', so that the system will recognise irregular clockings. For example, a doctor may be required to work on Christmas day so a special day could be entered here to cater for that possibility.

18.3.9 Miscellaneous

Click the **Abs/Misc** button to produce this form, which can be used to alter various details about the shift:

If an employee is absent when scheduled to be working, TMS will record an anomaly, and give a default code for the absence hours. If, for example, no code is defined for **Early leaving**, then if any employee leaves early no absence will be recorded, although an anomaly will still be generated. If two or more types are given the same codes here, the absences are combined.

Rounded lateness Code for rounded lateness at the start of a shift, or lateness back from a break.

Early leaving Code for an absence at the end of a shift.

Other absences Code for all other unplanned absences.

Actual lateness Code for actual lateness at the start of a shift, or lateness back from a break.

Using the drop-down lists, you are able to apply any of the pre-defined absence codes to the above default absences.

In the **Missed clockings** section, you can tick the relevant boxes if you wish to allow an employee to miss a clocking at the end of the workday, or when returning from a break. For example, if an employee goes home at the end of the shift without clocking out, and you have ticked the **Allowable at end of day** box, TMS will not record an absence but will treat it as though the employee has finished at his or her normal time.

The **Absence hours for a half day** section allows you to select what absence hours should be recorded if an employee is absent for a half day:

| | |
|---------------------------|---|
| Use the shift times | Uses the pre-defined shift times to calculate the absence hours (i.e., TMS will use the specified morning or afternoon core times of the relevant shift to calculate the absence hours for a half day). |
| Use half the standard hrs | Records half the standard hours for that particular shift (i.e., if an employee is supposed to work a shift consisting of 8 standard hours and then has a half day absence, TMS will calculate that he or she worked 4 hours that day). |
| Use... | Enter the amount of time that you wish to be recorded for a half-day absence. |

The box at the bottom of the form should be ticked if you wish to **Use alternative colour for shift**. A coloured box will then be displayed to the right - click on this box and you are able to select the colour in which the shift will be displayed on the future work planner.

The **Persistent keyed overtime** option is to be used for clocking systems where the employees clock with an hours code parameter on their clocking in. The preference ensures that when the day is processed, the processor does not revert the hours code specified in the clocking parameter to that defined in the shift. For example, imagine a shift that begins at 9am. A user comes in and clocks for overtime at 8am. The system with this parameter turned off will pay OT up to 9am and then at that point pay on BH. If you tick the box, the system will continue to use OT for payment until the employee clocks out.

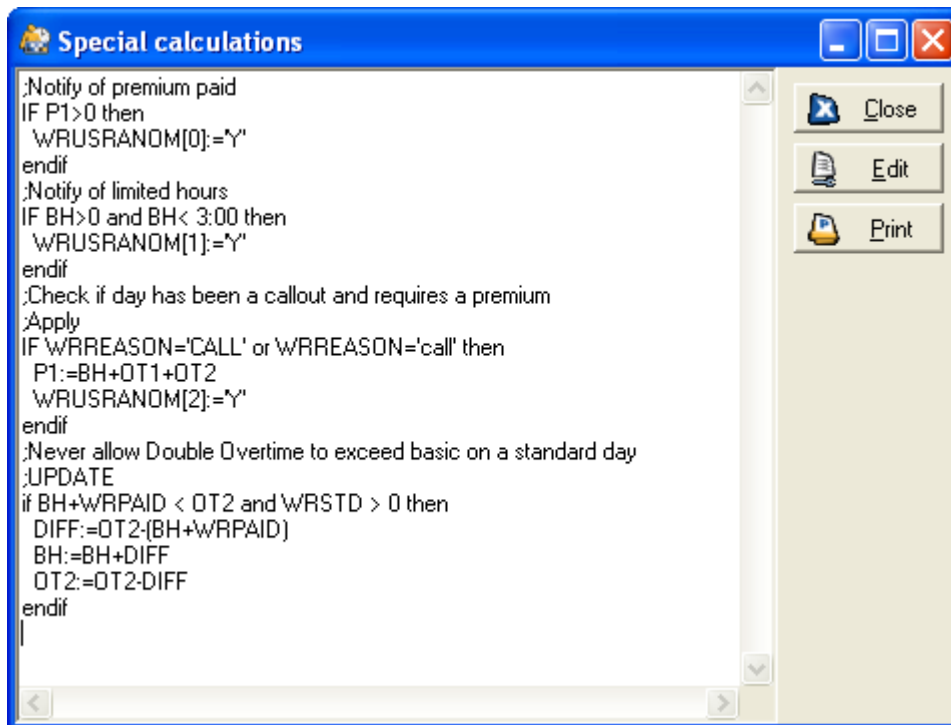
18.3.10 Overtime default

Click the **OT default** button to set the defaults for overtime on this shift:

Use this form to set the parameters for overtime, either side of the working day. This is to prevent employees from working too much overtime and so taking too much money from their employers. If the employee works any overtime over these limits, an anomaly is produced so that the employer can take note.

18.3.11 Calculations

Click this button to display a form similar to the following:



This increases the customisability of work rules; the user can create their own work rules for employees.

18.4 Rosters

A roster is a sequence of shifts, each of which defines the work rules for any one period of attendance at work. A roster may be one or more weeks long, depending upon the employee's work style. For example, a typical office worker might work a day of 9:00 to 17:00, except on a Friday, when they leave at 16:00, and on weekends when they do not have to come in at all, but may wish to work overtime. They would therefore have three **shifts**:

Shift 1: 9.00 - 17:00
 Shift 2 9:00 - 16:00
 Shift 3 Overtime, if required.

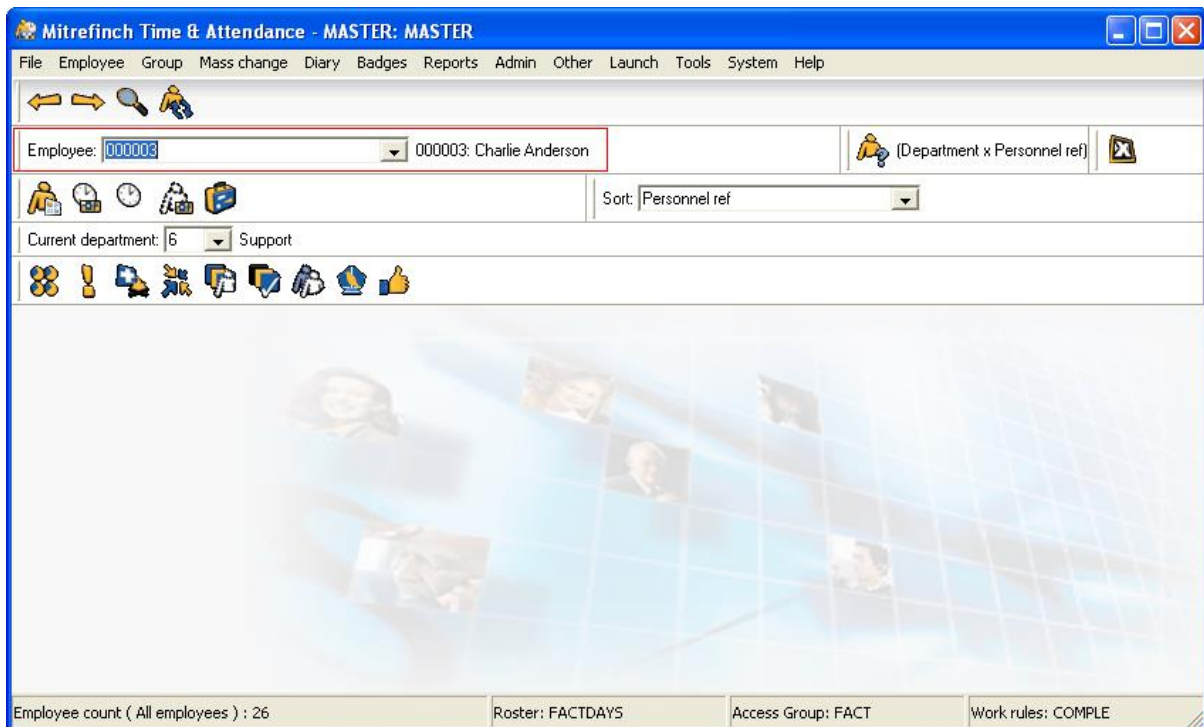
Their **roster** would be made up of those three shifts on the following basis:

| | |
|-----------|---------|
| Sunday | Shift 3 |
| Monday | Shift 1 |
| Tuesday | Shift 1 |
| Wednesday | Shift 1 |
| Thursday | Shift 1 |
| Friday | Shift 2 |
| Saturday | Shift 3 |

18.4.1 Adding a Roster

There are two methods of adding ('defining') rosters: the first method is to define a roster for a particular employee, name it, and then apply it to any other employee with the same work patterns; this can be useful if you wish to personalise a roster. The second method involves the **Roster Manager**, accessible via the **Maintain Rosters** option on the **System** menu.

In order to create a new personalised roster, first select the employee whose roster you wish to personalise from the drop down menu at the top of the main screen:



Then select the **Employee** menu from the toolbar on the TMS main screen. Then select **Employee details** from the resulting menu. A screen containing the selected employee's record will appear, similar to that shown below:

Maintain employee details

Badge ref. 882255

Ref: 882255 | 882255: Greg Symonds | Status: AP | Update on 08/05/2007

Personal details:
 First names: Greg
 Initials: G
 Surname: Symonds
 Title: Mr
 Sex: M Male
 Work rules: SHOP Weekly Shop Staff
 Department: 7 Hardware
 Pay Ref.:

Working time regulations:
 EWTD year start: ...
 EWTD entitlement: 0 days

Options:
 Include in payroll Apply WTD
 Night worker

Roster:

 Daytime Office Flex
 Base week:

Access group:

Contract:
 Start Date: 23/02/2007 ...
 Process from: 23/02/2007 ...
 Leave date: ...

Site code:

Profile: EMPFULL Full Employee Rights

Line Manager:

Buttons: Close, Apply, Undo, Print

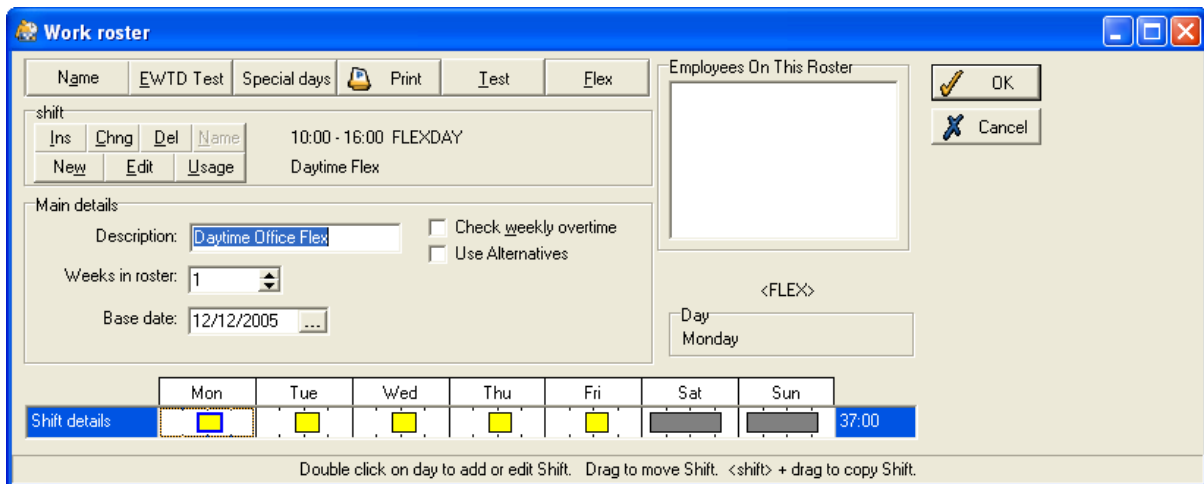
Footer: TMS Entitlements Contact points Job

Click the **Edit** button, or update if the changes are only to apply from a specified date, on the right of the screen, as highlighted above. Click the **Change** button on the **Roster** pane. Now select a base roster that you wish to personalise and then click on the **Personalise** button:

Roster

Daytime Office Flex
 Base week:

A form similar to the following will now be displayed:

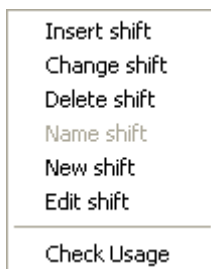


You are able to set up each individual shifts (the working times and **work rules** for one particular attendance at work). This section assumes that you have already defined the required shifts, and that here you simply wish to set up a new roster by inserting pre-defined shifts.

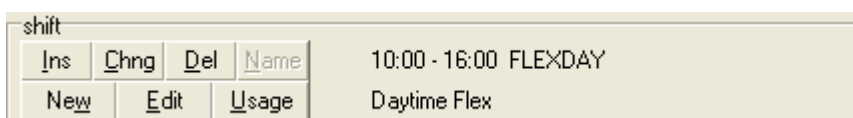
By default, the roster is set to repeat each week; therefore the number in the **Weeks in roster** field will be one, as shown above. If the roster rotates over a number of weeks, enter the number of weeks before the pattern of shifts repeats itself in this field. You must also enter a **Base date**, the date on which the employee is due to start the roster, in the **Employee base date** field (shown in the example above as 12/12/2005).

Enter a brief description of the shift in the **Description** field, and then click on the **Name** button on the top left of the pane in order to name the roster.

Select the first day on which the work pattern is due to start and either double click on that day to define a new shift (if one has not already been defined; see **Maintain shifts** on page 211), or right click on that day to display a list of options similar to the following:

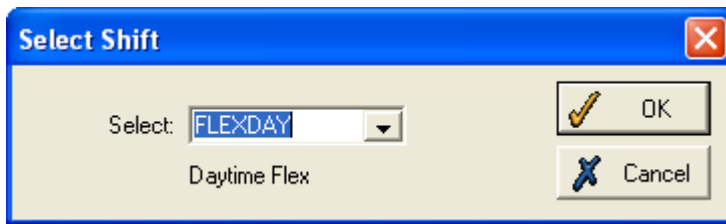


This menu gives you the option to insert a shift or define a new shift, as well as the option to edit the existing shift, delete it, or change which shift is utilised for that particular day. This functionality is also available via the buttons to the top left of the roster screen:



Both the function buttons and the menu pictured above also have the option to check which rosters and employees use a particular shift. In either case, this information is shown by selecting **Usage**.

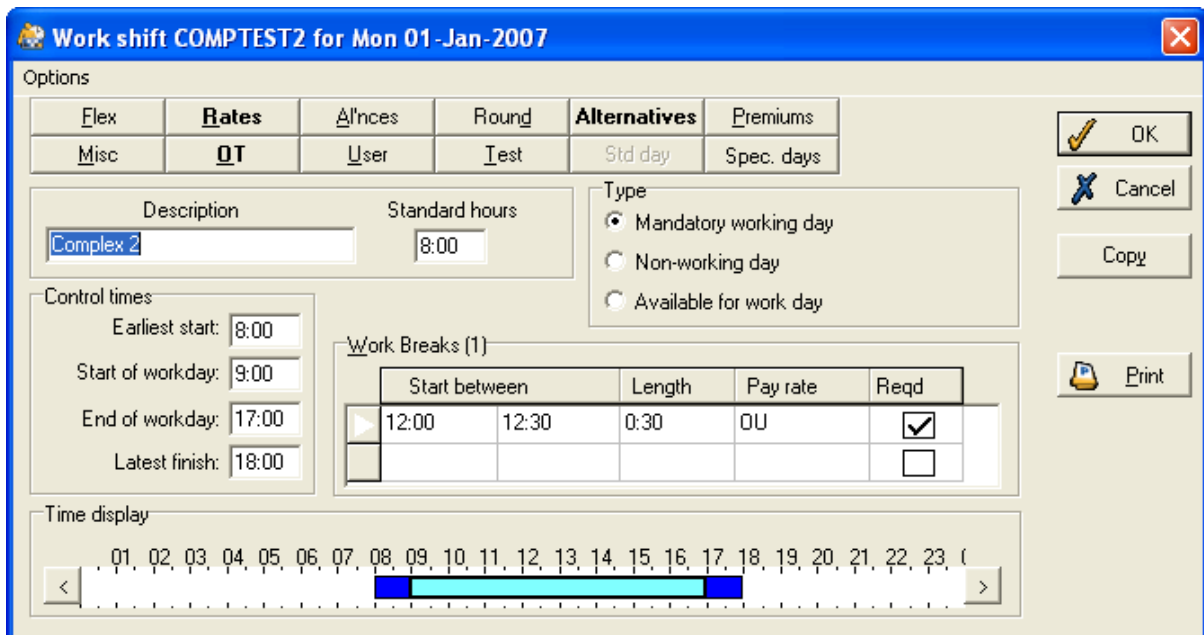
In this case, we simply want to insert an already determined shift. Select **Insert** from either menu or pane to display a form similar to the following:



The 'Select Shift' dialog box has a blue title bar with a close button. It contains a 'Select:' label followed by a dropdown menu showing 'FLEXDAY'. Below the dropdown is the text 'Daytime Flex'. To the right are two buttons: 'OK' with a pencil icon and 'Cancel' with a blue 'X' icon.

Select the required shift, and click **Ok**. The shift will then be inserted into the selected day.

If you want to check that the shift is the correct one, double click on it to display a form similar to the following:



The 'Work shift COMPTEST2 for Mon 01-Jan-2007' dialog box has a blue title bar with a close button. It contains several sections:

- Options:** A grid of tabs including Flex, Rates, Al'nces, Round, Alternatives, Premiums, Misc, OT, U_ser, I_est, Std day, and Spec. days.
- Description:** A text field containing 'Complex 2' and a 'Standard hours' field containing '8:00'.
- Control times:** Fields for 'Earliest start: 8:00', 'Start of workday: 9:00', 'End of workday: 17:00', and 'Latest finish: 18:00'.
- Type:** Radio buttons for 'Mandatory working day' (selected), 'Non-working day', and 'Available for work day'.
- Work Breaks (1):** A table with columns: Start between, Length, Pay rate, and Reqd.

| Start between | Length | Pay rate | Reqd |
|---------------|--------|----------|-------------------------------------|
| 12:00 12:30 | 0:30 | OU | <input checked="" type="checkbox"/> |
| | | | <input type="checkbox"/> |
- Time display:** A horizontal timeline from 01 to 23 with a blue bar indicating the shift duration from 08 to 18.

Buttons on the right include 'OK', 'Cancel', 'Copy', and 'Print'.

This form displays details for that particular shift (see **Maintain shifts** on page 211 for more details on this form).

Once you have entered a shift into the roster, if this shift is going to be repeated on other days of the week, you can copy it to them by deleting the current shifts on those days, then pressing the 'Shift' key on your keyboard, selecting the inserted shift and dragging it into the now blank days.

If the roster rotates over a number of weeks (e.g. mornings in the first week, afternoons in the second and nights in the third) then enter the required number of weeks in the **Weeks in roster** field to display a **Work roster** form similar to the following:

Insert or copy shifts into the relevant days of the next two weeks to complete the roster.

Once you have clicked **OK**, the list of rosters that can be selected will now include a new roster.

18.4.2 Check Weekly Overtime

If the employee's work rules enable period hours adjustment then you have the option to check weekly overtime. This option enables you to define the minimum number of hours (either rostered hours or however many hours you wish to specify) that an employee must work in this roster before they are allowed any overtime. If you tick this box, then the following information will be displayed on the **Work roster** form:

Select one of the following:

Rostered Hours: the basic number of hours that the employee is required to work.

Other: any other number of hours that you wish employees to work before they are allowed overtime.

18.4.3 Name or Personalise

If you are likely to want to re-use this roster for different employees you will need to name the roster. Select **Name** from the toolbar at the top of the work roster pane:

Once this has been done, a form similar to that shown below will be displayed:

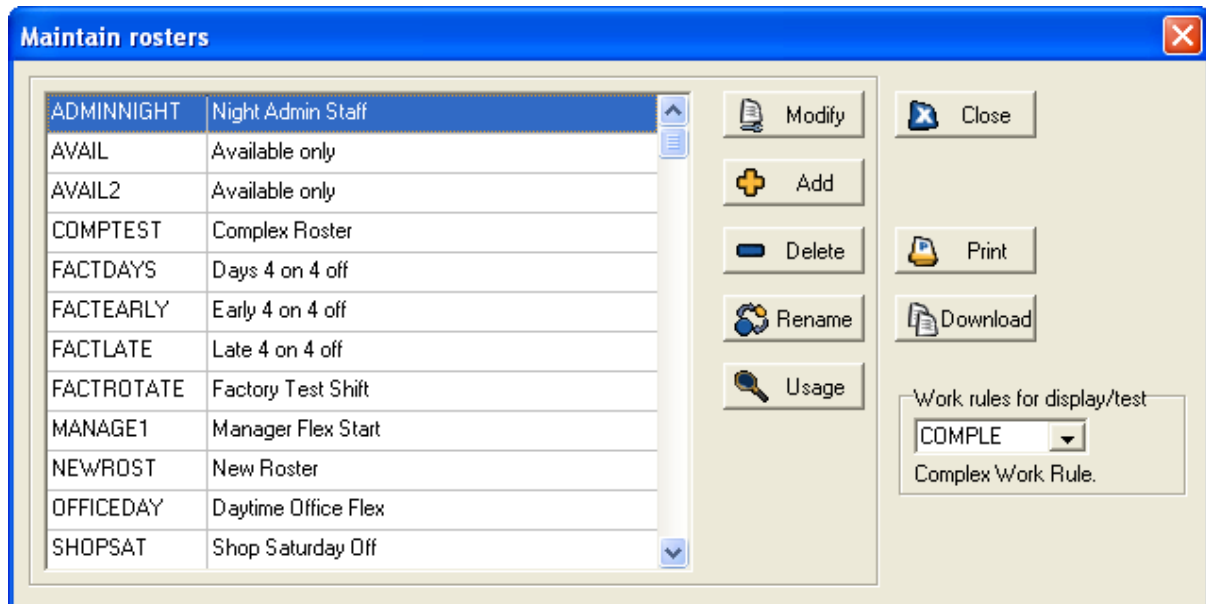
Enter a unique name for the roster and select **Ok**. This roster can now be assigned to any other employee.

Once you have clicked **OK**, the list of rosters (for all employees) that can be selected will from now on include the new roster.

N.B. Personalised rosters lack names, and therefore will not appear in the list of rosters.

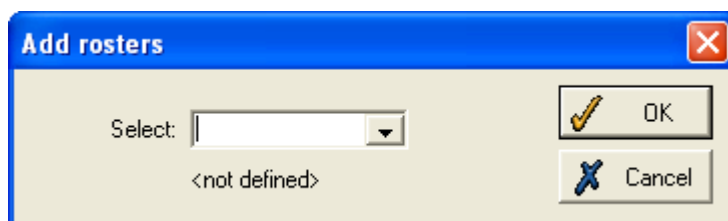
18.4.4 Setting up a Roster in the Roster Manager

You can add (define) or edit a roster using the **Roster manager** form. If you use this method, select **Maintain Rosters** from the **System** menu. A form similar to the following will be displayed:

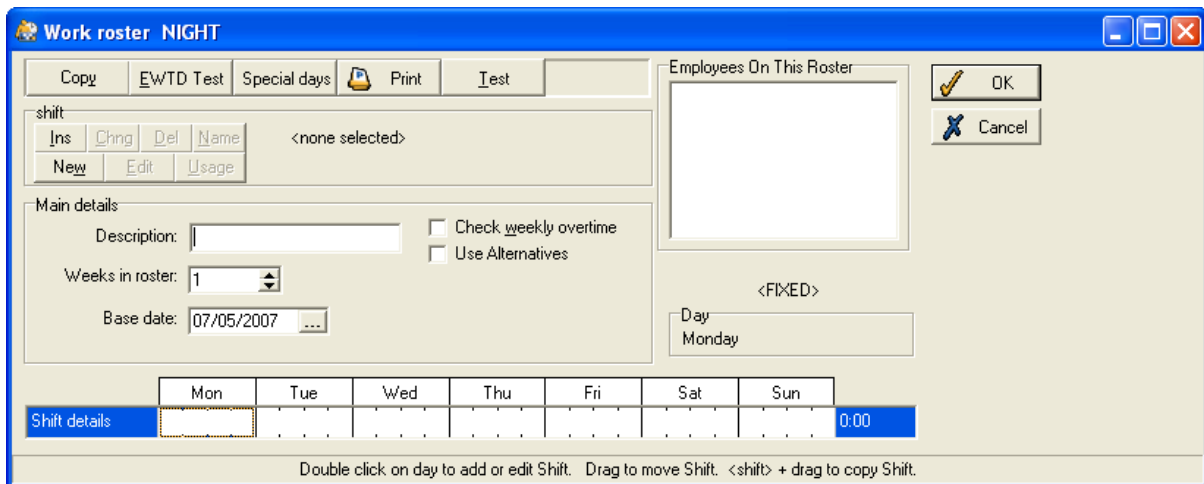


N.B. The 'Work rules for display/test' function is used when you wish to test or display a certain roster against a particular set of work rules.

To add a roster, select **Add** to display a form similar to the following:



Enter the name of the new roster (making sure it is unique) and select **Ok**. A form similar to the following will then be displayed:



This form is similar to that used in creating a personalised roster, above, except that the fields in the **shift details** pane are blank. Double click on these fields to set up a shift.

N.B. In rosters which utilise flexi-time, it is possible to set up the minimum and maximum level of hours before flexi-time is applied. This is done by clicking the 'Flex' button at the top of the roster screen, and then setting the appropriate values in the resulting window.

18.4.5 Edit a Roster

To edit a roster, first select **Maintain rosters** from the **System** menu. Select the roster which you wish to edit and then click the **Modify** button on the right of the pane. This will display the work roster form, allowing you to add, edit and delete shifts within that roster.

18.4.6 Assigning an Employee to a Rotating Roster

When an employee has been assigned to a roster of more than one week in duration, it is possible to allocate them to shift rotation. Select the employee whom you wish to assign, and then select **Maintain Employee details** option from the **Employee** menu in the toolbar on the main TMS form. Once the employee's details have appeared, click the **Edit** button on the right of the window, or **Update** if changes are supposed to apply from a particular date onwards:

Maintain employee details

Badge ref. 288888

Ref: 088888 088888: Tony Kendrick Status: AP Read only

Personal details:
 First names: Tony
 Initials: T
 Surname: Kendrick
 Title: Mr
 Sex: M Male
 Work rules: SHOP Weekly Shop Staff
 Department: 6 Support
 Pay Ref.:

Working time regulations:
 EWTD year start: ...
 EWTD entitlement: 0 days

Options:
 Include in payroll Apply WTD
 Night worker

Approver:

Roster:
 Change
 Daytime Office Flex Personalise
 Base week:

Access group:
 Change
 Personalise

Contract:
 Start Date: ...
 Process from: ...
 Leave date: ...

Site code:

Profile: Full Employee Rights

Line Manager:

TMS Entitlements Contact points Job

Close
Update
Edit
Print

Now click on the **Edit** button within the **Roster** pane, as highlighted in the image below:

Roster

Change
 Complex Roster Personalise
 Base week: **Edit**

Once the edit button has been selected, a form similar to the following will be displayed:

Allocate employee to rotation

2 week roster: Support 0800-1630 (Flex)

Base week:

Show roster from:

OK Cancel

| Date | Shift | Time display | Hours |
|----------------|------------|--------------|-------|
| 27/07/2006 Thu | 0800-1630 | | 7:30 |
| 28/07/2006 Fri | 0800-1630 | | 7:30 |
| 29/07/2006 Sat | 0900-1730F | | 7:30 |
| 30/07/2006 Sun | NwD | | 0:00 |
| 31/07/2006 Mon | 0800-1630 | | 7:30 |
| 01/08/2006 Tue | 0800-1630 | | 7:30 |
| 02/08/2006 Wed | 0800-1630 | | 7:30 |
| 03/08/2006 Thu | 0800-1630 | | 7:30 |
| 04/08/2006 Fri | 0800-1630 | | 7:30 |
| 05/08/2006 Sat | NwD | | 0:00 |
| 06/08/2006 Sun | NwD | | 0:00 |
| 07/08/2006 Mon | NwD | | 0:00 |
| 08/08/2006 Tue | 0800-1630 | | 7:30 |
| 09/08/2006 Wed | 0800-1630 | | 7:30 |

The **Base week** drop down menu at the top of this screen allows you to set the week of rotation which the employee is on. The **Show roster from** field allows you to view the roster for past and future dates. The main form shows the shifts for this employee for this shift rotation.

N.B. This form can also be accessed via the **Mass Roster Change** option.

18.4.7 EWTDT Test

This option is available so that rosters can be tested to see if they comply with the specifications of the European Working Time Directive. It is available via the **Work Roster** form, which can be accessed either via the **Maintain Rosters** option in the **System** menu, or through the **Personalise**

option, available on the **Employee details** form, accessed via the **Employee** menu on the TMS main form.

In either case, the **Work roster window** is displayed. Once this is the case, click the **EWTD test** button at the top of the window, and a form similar to the following will be displayed:

Any of the options in the **Test** and **Rest entitlements** panes at the top of this form may be included in an EWTD test.

The 48 hour average and the 8 hour average (Nights) options require a reference period to be defined (a number of consecutive weeks that the roster is to be tested over).

The EWTD currently states that an employee must not exceed 48 working hours per week, usually averaged over a 17 week period.

It also states that night workers must not exceed 8 working hours in each 24 hour period, usually averaged over a 17 week period. It is therefore useful to define a 17 week reference period for this test.

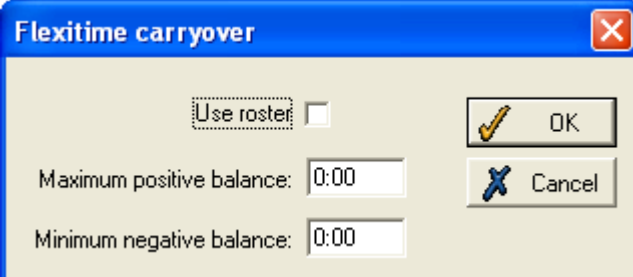
When the **Start** button is selected, these averages will be calculated from the base date defined in the roster, over the defined reference period. To ensure that all combinations are tested, this function will roll the weeks to account for rotating rosters (e.g. rosters scheduled to run over more than one week). The test results will then be displayed.

These results are meant to show whether the roster being tested complies with the EWTD regulations (depending on the options selected on the form). If, for example, the form calculates that the employee will be working an average of 52 hours per week, the roster does not comply with the **48 Hour Average** regulation. It is then **your** responsibility to alter the shift details accordingly.

18.4.8 Flexitime carryover

The Flexitime balances, **Max Positive Balance** and **Maximum Negative Balance**, are held in the **Work Rules**. However, if you have many part time employees with varying balance values you are required to have too many work rules, so the same balance fields in the roster associated with the employee.

Click the **Flex** button on the topmost panel of the main **Work roster** form. The button will only be visible for Flexitime rosters and is provided as the new fields in the roster table (TMSWP) have been created. The following form should be displayed:



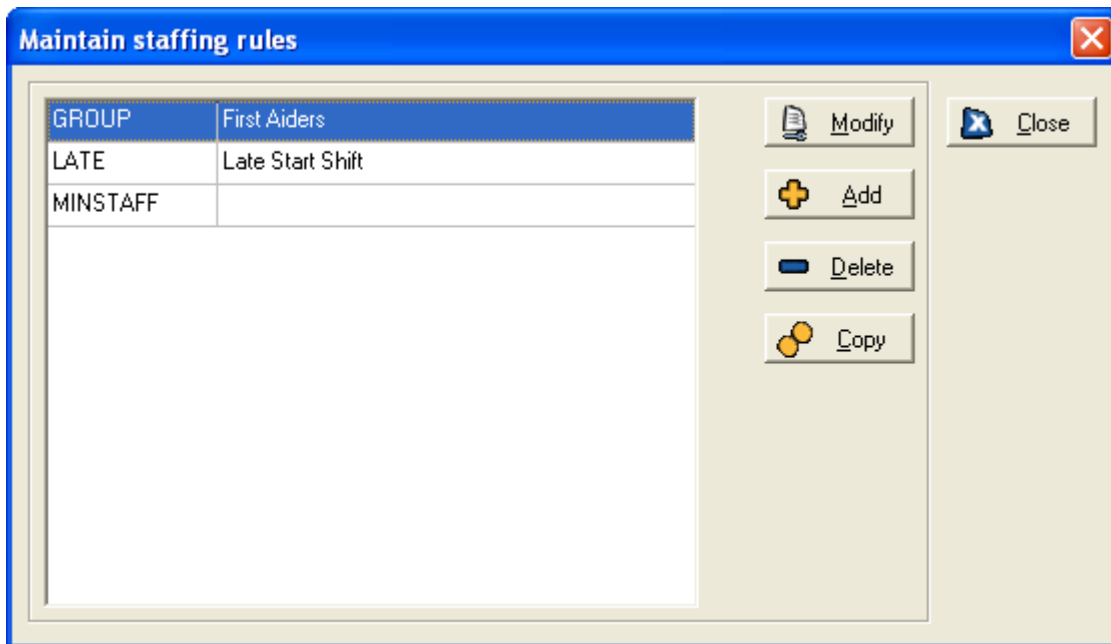
The screenshot shows a dialog box titled "Flexitime carryover". It contains a checkbox labeled "Use roster:" which is currently unchecked. Below this are two input fields: "Maximum positive balance:" and "Minimum negative balance:", both containing the value "0:00". To the right of these fields are two buttons: "OK" with a pencil icon and "Cancel" with a blue X icon.

The form allows you to enter values for the minimum and maximum flexitime balances used by the period end routines.

19 Staffing rules

19.1 Maintain staffing rules

Select the **System** menu and then select **Maintain staffing rules**. A form similar to the following should be displayed:



The screenshot shows a window titled "Maintain staffing rules" with a blue header bar and a red close button. The main area contains a table with two columns: "GROUP" and "First Aiders". The first row is highlighted in blue and contains "LATE" and "Late Start Shift". The second row contains "MINSTAFF" and is empty. To the right of the table are four buttons: "Modify" (with a document icon), "Add" (with a plus icon), "Delete" (with a minus icon), and "Copy" (with a double arrow icon). A "Close" button (with an 'X' icon) is located in the top right corner of the window.

| GROUP | First Aiders |
|----------|------------------|
| LATE | Late Start Shift |
| MINSTAFF | |

19.1.1 Modify a rule

Select a rule on the above form and then click **Modify**. A form similar to the following should be displayed:

Modify rule

Description:

Rule type

Group

Individual

Parameters

Count

Percentage

Minimum

Maximum

Planner Display %

None

Passed %

Failed %

Levels

| Level | Colour |
|-------|--------|
| 3 | |
| 5 | |
| | |

Ignore breaks when calculating rule

OK Cancel Help

Rule type Rule criteria Groups Valid times

The **Modify rule** form has four pages, accessible through the four tabs at the bottom of the form.

Rule type page

The first page of the form is for entering the type of rule and the parameters of the rule.

Enter a **Description** of the rule to make it clear what the rule is specifying.

Then select the type of rule you are creating - **Group** or **Individual**. This example is for a group rule. For individual rules, see **Individual rules**, page 184.

Now choose whether the rule is to refer to a **Count** (i.e., a particular number of employees) or a **Percentage** (of the group). For example, with a rule which specifies at least three employees passing the rule must be at work at all times, you would select **Count**. Alternatively, you may be creating a rule requiring that a certain percentage of the group who are working pass the rule at a time, in which case you would select **Percentage**.

Select whether the rule will require a **Minimum** or **Maximum** number (or percentage) of employees.

You can enter a number of different levels, i.e., values after which the rule is broken. When you enter a **Level**, select the colour in which you wish any violations at this degree to be highlighted in the planner.

By default, the **Colour** column for the first level you define will be displayed in red, but this can be changed by clicking the coloured box and then clicking the button that appears at the right of the column, and selecting the required colour from the form that is displayed. The same colour cannot be used for more than one degree of a rule.

For a **Minimum** rule, the level is the minimum value (count or percentage) of employees who have to pass the rule to avoid the rule being broken. In the above example, two degrees of violation of the rule have been set up. This means that, if there are less than three employees passing the rule during a particular period, this period will be displayed in the darker colour. If there are at least three

employees passing the rule, but less than five, that period will be in the lighter colour. If there are five or more employees passing the rule, the rule is not being violated, and so this period will not be highlighted.

If you selected **Percentage** above rather than **Count**, the degree you enter would be the percentage of the group who pass the rule (e.g., you may have one degree specifying at least 30% of the group must pass the rule, or else the planner will display the darker colour, and another degree specifying 50% of the group must pass the rule, or else the planner will display the lighter colour).

If you selected **Maximum** rather than **Minimum**, the degrees you enter would be the maximum value before the rule is broken. For example, you may want to specify that no more than 8 employees can pass the rule at a particular time, in which case you would enter '8' as a degree. Any periods when more than 8 employees pass the rule would then be highlighted in the colour you selected for the degree.

In the **Planner display %** section, you can define the degree to which the rule has been passed or failed to be displayed on the planner. Alternatively, you can choose to have no indication of whether the rule has been passed or failed.

Tick the box at the bottom of the page if you wish the system to **Ignore breaks when calculating rule**.

Rule criteria page

Click on the **Rule criteria** tab on the **Modify rule** form. A page similar to the following should be displayed:

The screenshot shows a window titled "Modify rule" with a close button (X) in the top right corner. The main area contains a text box with the text: "Employee contributes to count if:" followed by a large text area containing the expression: "[WRWSEND>21:00 or WRWSEND<WRWSST) and AGE <= 18". To the right of the text area are three buttons: "OK" (with a checkmark icon), "Cancel" (with an X icon), and "Help" (with a question mark icon). Below the text area are two buttons: "Builder" and "Check syntax". At the bottom of the window, there are four tabs: "Rule type", "Rule criteria" (which is selected and highlighted), "Groups", and "Valid times".

On this page you can define how the rule works. The memo box contains the calculation used to determine if an individual employee passes the rule. The result of the expression must be **True** or **False**. The **Builder** button is available to help create the expression.

Groups page

Click on the **Groups** tab on the **Modify rule** form to display a page similar to the following:

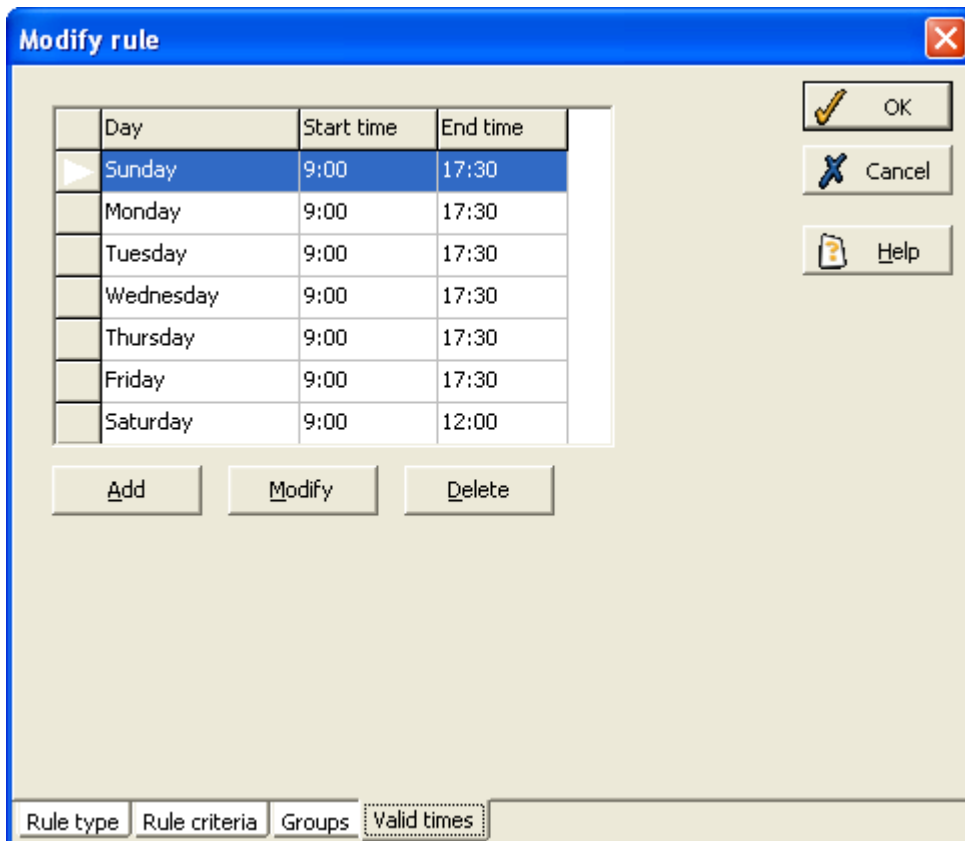
The screenshot shows a dialog box titled "Modify rule" with a blue header and a close button (X) in the top right corner. The main area is light beige. At the top left, it says "Applies to:" followed by a checked checkbox labeled "Planner selection". Below this is a large text input field containing the text "OD.DEPARTMENT:1..9". To the right of the input field are three buttons: "OK" with a checkmark icon, "Cancel" with an X icon, and "Help" with a question mark icon. Below the input field is a button labeled "Selection". At the bottom of the dialog, there are four tabs: "Rule type", "Rule criteria", "Groups" (which is selected and has a dotted border), and "Valid times".

A rule can apply to either the currently selected employees in the planner or else a specified group of employees. If **Planner selection** is not checked then, by default, a group rule will only be shown in the planner if there is some overlap between the employees shown in the planner and the range of employees to which the rule applies.

The same is true for an individual type rule, although whether the rule is shown or not in this case will not make a difference to the appearance of the planner.

Valid times page

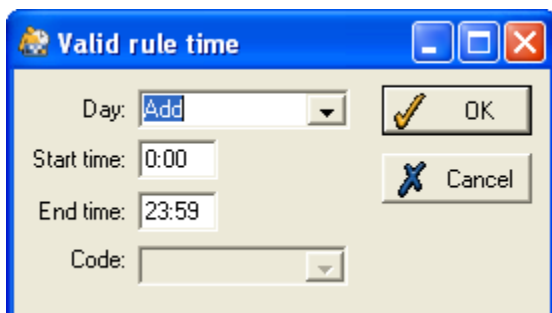
Click on the **Valid times** tab on the **Modify rule** form to display a page similar to the following:



On this panel, you must define the days and times when the rule is to apply.

In this example, the rule will apply from Mondays to Fridays between 9:00 and 17:30, and on Saturdays between 9:00 and 12:00. Outside these limits, the rule will not be calculated.

To enter the times when the rule is to apply, click **Add**, to bring up this box:



Use the **Day** drop-down list to select either an individual day of the week, or **All** to include every day in the rule.

Now enter a start and end time, during which the rule will be applied on this day. Click **OK** to see the times you have set displayed in the table as above.

If you need to delete a day from the rule calculation, select it so it is highlighted in the table, and then click the **Delete** button.

To modify a day, select it and then click **Modify**. Make the required modifications in the same way as for adding a day.

Click **OK** when you have finished setting up the rule. It will now be displayed in the **Maintain rules** table, and you will be able to use it on the work planner to see any periods of violation.

19.1.2 Add a new rule

To create a new rule click the **Add** button on the **Maintain staffing rules** form. Enter a name for the new rule and then the following form will be displayed:

Modify rule

Description:

Rule type

Group

Individual

Parameters

Count

Percentage

Minimum

Maximum

Planner Display %

None

Passed %

Failed %

Levels

| Level | Colour |
|-------|--------|
| | |
| | |

Ignore breaks when calculating rule

OK

Cancel

Help

Rule type | Rule criteria | Groups | Valid times

For details on how to fill in this form, see the above section, **Modify a rule** on page 239.

19.1.3 Delete a rule

Select the appropriate rule on the **Maintain staffing rules** form and then click the **Delete** button. Confirm that you would like to delete the rule.

19.1.4 Copy a rule

Select the rule you wish to copy on the **Maintain staffing rules** form and then click the **Copy** button.

20 Reports

20.1 Pre-defined reports

This chapter is a guide to the standard reports that can be produced from within the system. It does not cover the **Custom reporting** feature, which enables users to design their own reports. Custom reporting is explained in the **Report Writer** manual.

Each of the standard reports is created by Mitrefinch. The system administrator may have modified these reports to suit individual company requirements. As this chapter only details the report layouts that are supplied with a standard Mitrefinch package, it is possible that certain sections of this chapter do not correspond exactly with the report layouts you can produce, but the methods for producing reports (i.e., print, display, email or export a report) will be the same.

The standard reports available to you are listed on the **Reports** menu. They normally include the following, although this is not definitive, as your system administrator may have customised your options:

| Report | Definition |
|---------------------|------------|
| Employee details | emp |
| Payroll report | payrep |
| Absence hours | absence |
| Absence periods | absper |
| Clockcard | clocking |
| Flexitime anomalies | flexanom |
| Holiday entitlement | holent |

Depending upon your system set-up, the report list may include some of the following European Working Time Directive reports:

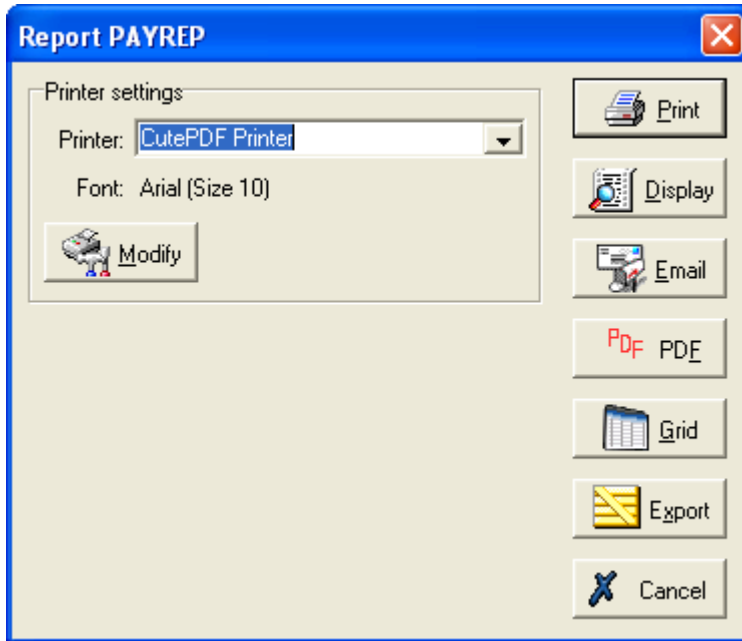
| Report | Definition |
|--------------------------|------------|
| 48 hour average | ewtd48 |
| Night workers | ewtdnite |
| Break entitlement | ewtdbrks |
| EWTD holiday entitlement | ewtdhols |

There might also be an Anomaly report listed on the menu. This works differently to other reports (for details, see **Anomaly report**, page 250).

20.2 Run a report

Introduction

There are four ways of producing reports from TMS: display, print, email or save as a PDF. To run a pre-defined report, the required report should be selected from the **Reports** menu. When you have selected the report a form like this will be displayed:



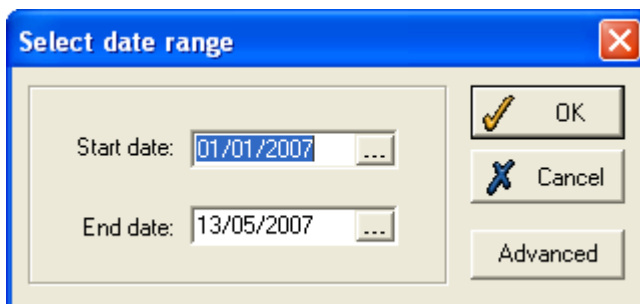
You have four options: **Print** the report, **Display** the report, **Email** the report, or save the report as a **PDF**.

20.2.1 Select employee range

Whichever of the four methods of producing the report you choose, the first thing you will see is the screen used to select the range of employees to be included. For details, see **Select range**, page 28.

20.2.2 Select date range

If the report you are producing is specific to a date range (e.g., employees' absence hours in the last month), you will have to select the period to be covered by the report. To do this, use the following screen:



This form enables the user to enter a date range. Either use the calendar buttons to select a start and end date for the report to cover, or select an **Advanced** range to bring up this form:

On this form, TMS can work out a specific date range (e.g., two weeks ago or one month in advance) automatically, instead of the user needing to enter the exact dates required. The example shown above would report on data for the last seven days, but there are numerous selection options, using the drop-down list and the other buttons. The drop-down list contains:

- Yesterday
- Last week/month/year
- Today
- This week/month/year
- Tomorrow
- Next week/month/year
- Daily
- Weekly
- Monthly
- Yearly

Selecting any except the last four options gives a definite date range (past, present or future), and disables the other options on the form. In this case, click **OK** to return to the previous form.

A **Daily**, **Weekly**, **Monthly** or **Yearly** selection allows a more complex range to be produced.

You should then select either **Past** or **Future** at the top of the form.

Now use the **Select** box to specify when the report should start (e.g., if you have a **Weekly** selection, you can select the number of weeks ago or in advance that should be the beginning of the date range).

The **For** box allows you to enter the duration of the date range (e.g., in a **Weekly** selection, select the number of weeks to be included).

NB: The date range always runs from the first day in the first period to the last day in the last period (e.g., if selected to start one month ago and run for one month, it will start on the first of last month and run until the end of that month).

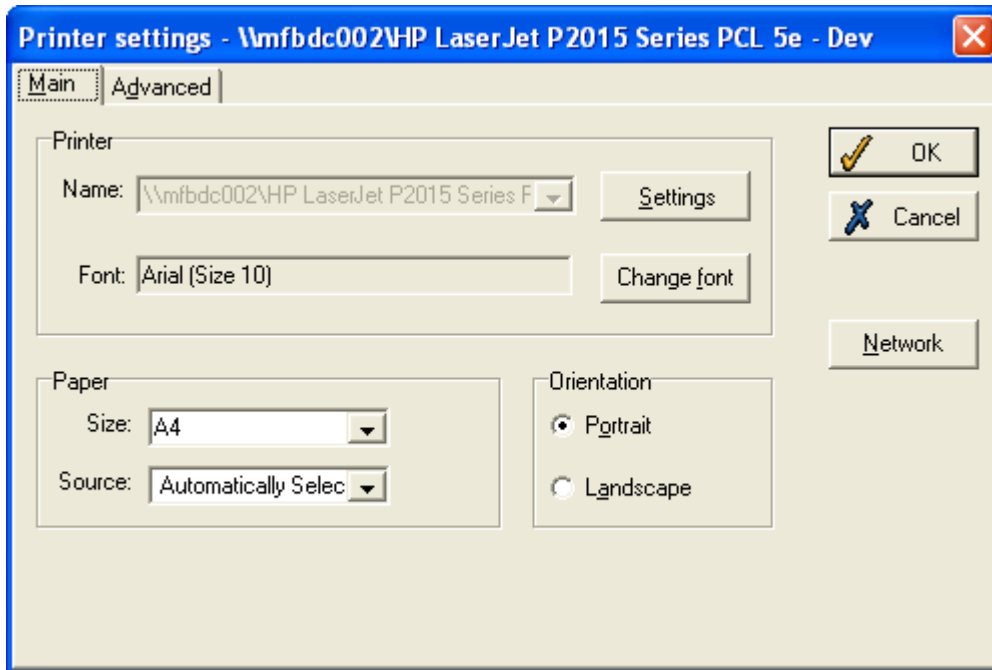
For example, if you wish to run a report on employee absences from three months ago, click on **Past** and select **Monthly** from the drop-down list, and enter '3' in the **Select** box. Now you have to decide the duration of the period you wish to report on. Enter '3' in the **For** box to report on the last three complete months. Alternatively, if you only want to report on a one-month period, enter '1' in the **For** box. If the current date is 10/06/2005, the absence report would run from 01/03/2005 to 31/03/2005.

Once you have selected the required date range, click **OK** to be returned to the previous page, which will display the date range selected. If these are not correct, click **Advanced** to enter a new definition.

When the start and end dates of the report are correct, click **OK** to produce the report.

20.2.3 Print

Before printing, you must ensure that the correct printer has been selected. To check the printer settings, click the **Modify** button to display this box:



See your system administrator if you require further advice on printer settings.

20.2.4 Display

This option allows the report to be displayed on screen, within TMS, without being saved, like this example which shows a section of a payroll report:

| Ref | Name | Date | Basic Hrs | Paid Abs. | OU | Abs |
|---|-------------|------------|--------------|-------------|-------------|-----|
| TMS - Demonstration only | | | | | | |
| Payroll Report printed at 9:20 on 29/02/2008 | | | | | | |
| Department: Administration | | | | | | |
| 01320066 | Bennett, K. | 22/01/2007 | 0:00 | 7:30 | 0:00 | B |
| | | 23/01/2007 | 6:27 | 0:14 | 0:46 | C |
| | | 24/01/2007 | 6:38 | 0:00 | 0:39 | |
| | | 25/01/2007 | 6:38 | 0:00 | 0:45 | |
| | | 26/01/2007 | 6:06 | 0:39 | 1:02 | C |
| Week: 2 | | | 25:49 | 8:23 | 3:12 | |
| | | 29/01/2007 | 6:38 | 0:00 | 0:59 | |
| | | 30/01/2007 | 6:35 | 0:00 | 0:58 | |
| | | 31/01/2007 | 6:07 | 0:27 | 0:42 | C |
| | | 01/02/2007 | 6:34 | 0:00 | 0:43 | |
| | | 02/02/2007 | 6:30 | 0:00 | 0:45 | |
| Week: 3 | | | 32:24 | 0:27 | 4:07 | |
| | | 05/02/2007 | 6:37 | 0:00 | 0:45 | |
| | | 06/02/2007 | 6:38 | 0:00 | 0:43 | |
| | | 07/02/2007 | 5:41 | 1:55 | 0:45 | C |
| | | 08/02/2007 | 6:06 | 0:28 | 0:37 | C |
| | | 09/02/2007 | 6:30 | 0:00 | 0:42 | |
| Week: 4 | | | 31:32 | 2:23 | 3:32 | |
| | | 12/02/2007 | 6:41 | 0:00 | 0:45 | |

This report can now be printed, if required, by clicking the **Print** button.

20.2.5 Email

The email reports option allows you to send the report as an attachment in an email. The following screen will be displayed, for you to enter the email address of the recipients. You can also alter the message displayed with the email.

| Email report | |
|---|---|
| To: <input type="text"/> | Attachments C:\TEMP\shift roster allocation report.p |
| CC: <input type="text"/> | <input type="button" value="OK"/> |
| BCC: <input type="text"/> | <input type="button" value="Cancel"/> |
| Subject: Report: shift/roster allocation report | |
| Please see the attached report. | |

20.2.6 PDF

Producing the report as a PDF has the benefit of allowing you to save it to disk. When you have chosen the location for the report to be saved, it will be displayed immediately.

20.2.7 Point in time reports

If the report has been set up to display information as of a particular point in time (i.e. historical or future information can be used in the report instead of current data), this box will be displayed after you have selected the range:

Select the required date and click **OK**.

Now produce the report as normal.

20.3 Anomaly report

The **Anomaly report** is different to the other reports detailed in this chapter, in both layout and method of production. It can show anomalies occurring in work records in the current or previous period, or on a specific single day. To produce this report select **Anomaly report** from the **Reports** menu. This form will be displayed:

Select the period that you want to check for outstanding anomalies. This can be:

- **Current period** - the current work period as defined by the frequency at which period end processing is performed.
- **Previous period** - the previous work period.
- **One day only** - if you select this, you must also select the required date in the box that appears.

Now select which anomalies you would like to print:

- **Only on work rules** - select this and the report will only display those types of anomaly which are selected in the **Anomalies** section of the employees' work rules.
- **Only selected** - if you only need to report on a particular type, or types, of anomaly, select this option, and you will see a **Select anomalies** button. Click the button and you can select the anomalies required, overriding the settings in the work rules. Selecting anomalies to include in the report uses the same principle as selecting any other items. For details, see **Select available items**, page 31. Only those anomalies that are selected here will be reported on.
- **Work rules and selected** - this option allows you to produce a report including all the types selected in the **Anomalies** section of the work rules, and any other types you wish to add. Select the additional anomalies in the same way as explained above, using the **Select anomalies** button.

The **Split pages** function, if ticked, ensures that each employee in the report will appear on a separate page.

You can also select the sort order of the report, from the options in the **Sort by** list.

Once you have selected the details of the report, you can produce it in four ways - **Print**, **Email**, **Preview** or save **To Excel**. These options are similar to those for running a pre-defined report (see **Run a report**, page 245, for details).

Whichever option you choose, the **Select range** form will be displayed, which should be used for selecting which employees are to be reported on (for details, see page 28).

21 British summer time changes

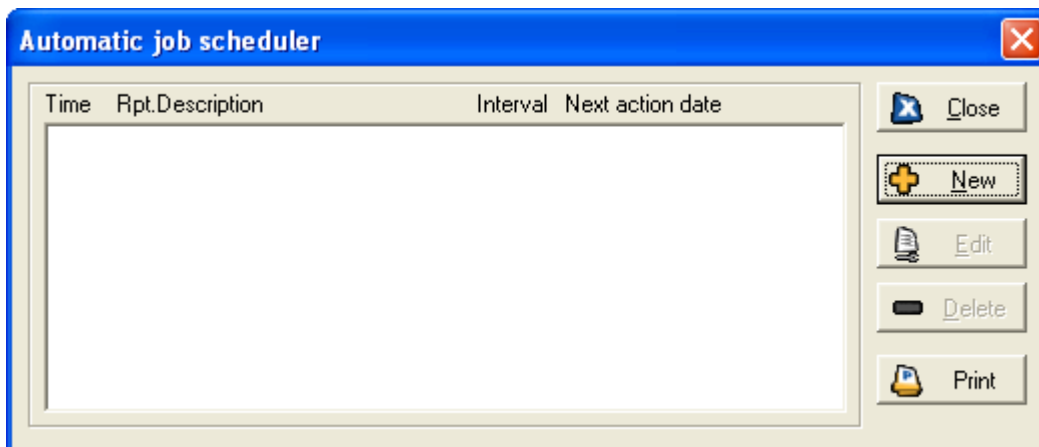
This chapter explains the procedure involved when changing the time on your system in accordance with British Summer Time and Greenwich Mean Time changes.

The twice yearly changes to the clocks between BST and GMT mean that the time shown on all clocks has to be changed forward or backwards by one hour. This change occurs at 02:00 on a specified Sunday. TMS allows you to set up a command to change the time on all terminals so that employee clockings will be accurate.

You must first ensure that the correct time is entered on the control PC. (Note that the time changes automatically on Windows® 95 systems and above.) If the time does need changing manually on the PC, right-click on the clock at the base of your main Windows® screen and select the **Adjust Date/Time** option. (The time and date can also be changed on the TMS Login form if the user has access to the Set time/Set date fields.)

When the time is correct on the control PC you can then use the poller to **Synchronise clocks**, in the manner described below.

Open the **Site monitor** program, and the **Site monitor form** will be displayed (see **Clocking Terminals**, page 255, for more details). Select **Command list** from the **Control** menu, then choose the required control PC from the drop-down list. (Alternatively, right-click on the required control PC on the **Site monitor form**, and then select **Command list**.) The **Automatic job scheduler** will appear:



This form can list jobs to be performed by the system that have been set up previously. Click **New** to display this form:

The screenshot shows a 'Job details' dialog box with the following settings:

- Job type:** Download employee details
- Job frequency:** Repeat daily (selected)
- Next action at:** 0:00 on 29/08/2007
- Terminals on this poller:** All (checked)
- Biometrics:** Include template in download (unchecked)

Select **Synchronise clocks** from the **Job type** drop-down list.

The **Job frequency** should be **Temporary**, because the job is only to be performed once. Enter the time and the date when the clocks will change.

Tick **All** terminals on this poller so that the change applies to all machines (if you do not select **All** you will be prompted to select a particular terminal, but beware that this could cause problems of inconsistency).

Click **OK**, and you will return to the **Command list** where the **Synchronise clocks** job will have been added. The clocks on all terminals will be synchronised at the specified time.

21.1 Adjust times on clockings

If the clocking terminals are not showing the correct time, the employees who used these terminals will have inaccurate clockings. This problem is most commonly experienced if the time on the terminals was not altered in advance of a change between GMT and BST.

To correct the problem, you can make retrospective alterations to the time registered by clockings. Open the **Mass change** menu and select **Adjust clockings for range**, and a screen similar to this appears:

Any adjustments affect a range of clockings, selected according to three factors:

- the time and date of the clockings
- the terminals used.
- the range of employees

Enter the amount to **Adjust clockings by** (the default is one hour), and whether the change is forwards or backwards (i.e., adding or subtracting an hour to the time on the clocking).

Select whether the adjustment is to affect all clockings made **Between** two specified times and dates, or **After** a certain time and date, and then enter the relevant details.

You must then select which terminals will be affected by the adjustment. Either tick the **All terminals** box, or choose a selection of terminals. To do this, use the arrows to move terminals from the **Available terminals** box to **Selected terminals** (see **Select available items**, page 31, for details).

Click **OK**, and you will then see the **Select range** form, which allows you to choose the employees whose clockings are to be adjusted (see **Select range**, page 28, for details).

22 Clocking terminals

Most of the tasks involving the clocking terminals are automatic and will have been set up previously by the system administrator. However, there may be a need to identify any errors that occur within the clocking terminals (e.g., a terminal may not be responding), or you may need to activate functions outside the normal schedule of events (e.g., send a table of employee details to a terminal).

Each clocking terminal has to be able to communicate with the central TMS database so that clockings can be retrieved. This communication process is termed polling.

The polling process may be started automatically, along with the processing task, upon logging in, by being added to the **Startup Group** within Windows®, or it might be run on a dedicated PC on the network, of which there may be more than one needed. The system administrator will advise the actual method of polling.

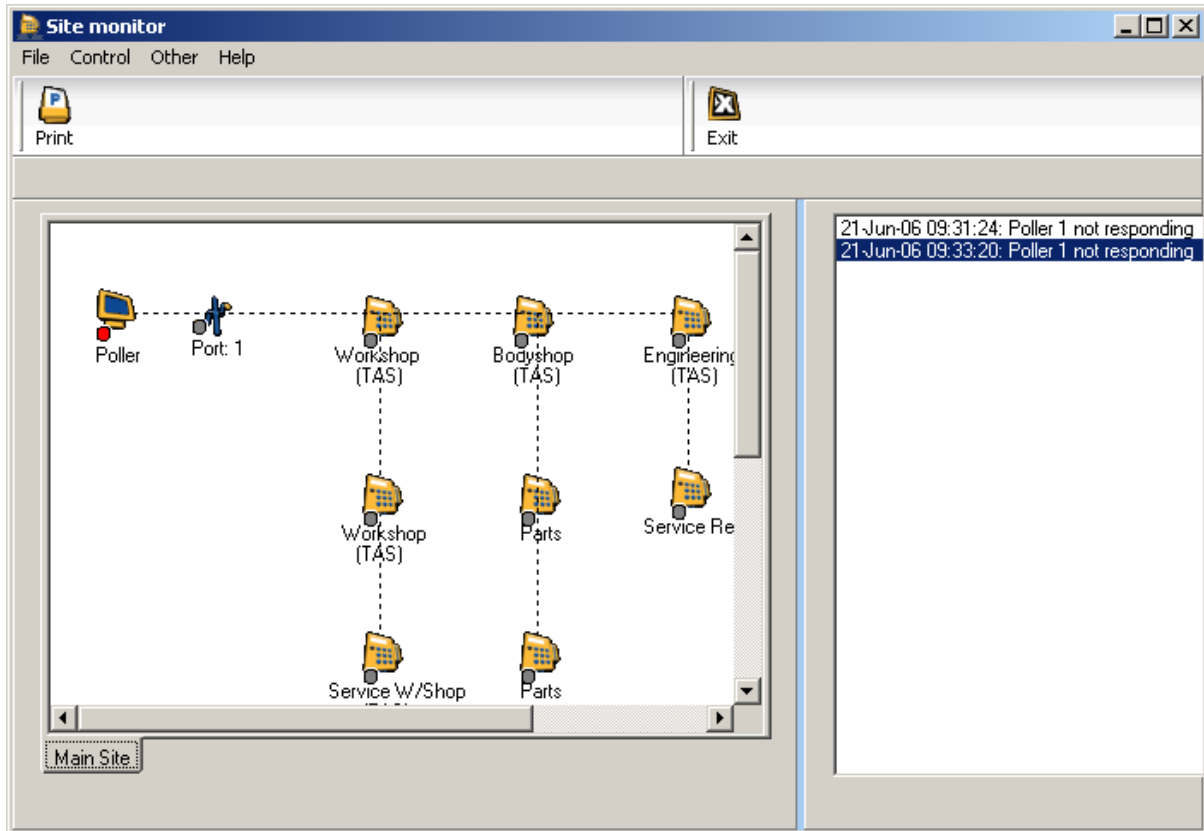
Once the polling program(s) have been started, they are all controlled by the **Site monitor**. This is an extremely useful program that controls the various communication tasks performed by the polling process. These tasks could include sending employee details to the terminals (so that the terminal knows who is allowed access), and identifying any problems that might occur within a terminal (e.g., the terminal may not be responding).

You can use the site monitor to control the terminals, on a PC other than the one that runs the polling program. Please note that the polling program should be running before the Site monitor is accessed, or the monitor will be out of date.

To open the monitor, either select **Site monitor** from the **Launch** menu in WinTMS, or select this icon from the **WINTMS** application folder:



This screen is displayed (although if you open the application from the application folder, it may open in site planner mode, in which case you should go to the **File** menu and select **Monitor mode** to open the site monitor):



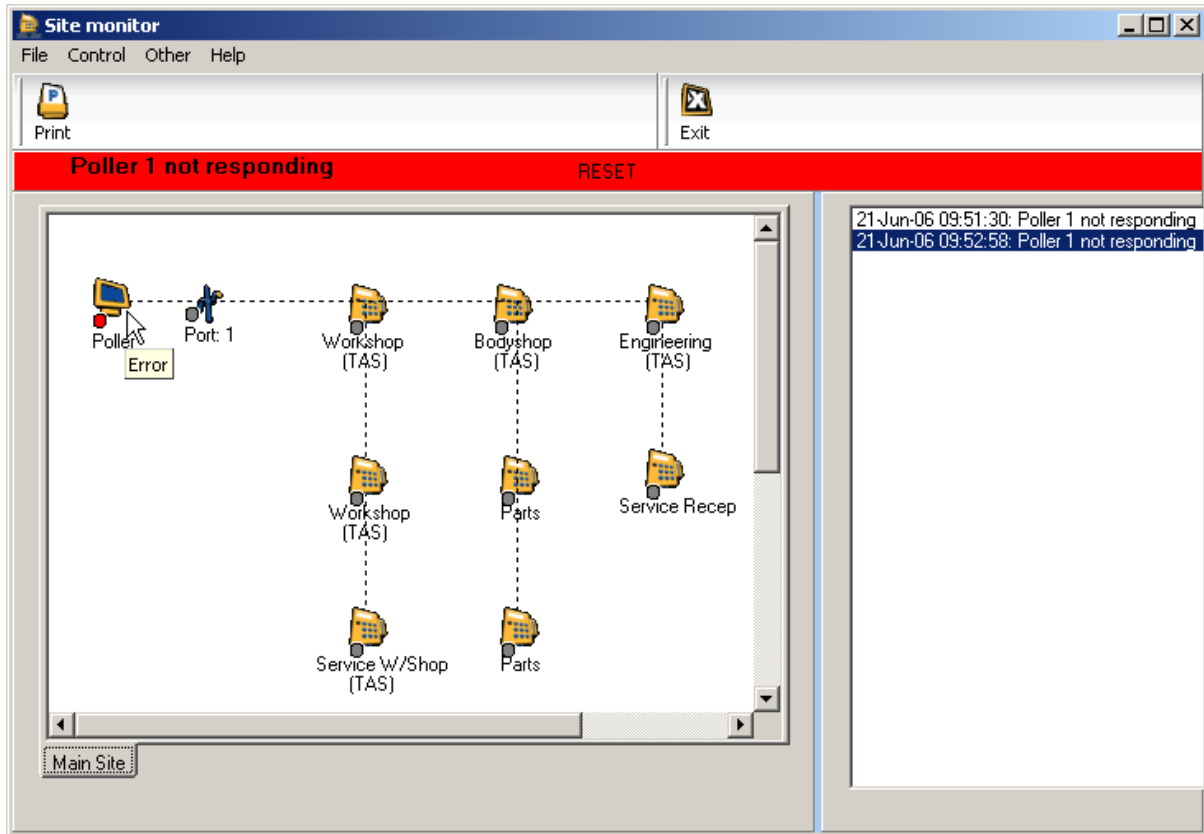
The site monitor is a visual layout of the terminal network, showing the PC (computer on which the polling program is running), the ports (physical lines) that connect the computer to one or more terminals, plus the registration terminals and access devices attached to each port. The box to the right is the **Current events log** - see page 257 for details.

22.1 Identifying problems

The **Site monitor** application can be used to identify, and then rectify, any problems that might occur within the terminal network. The problems that may occur within the terminal network can be identified by a number of features, including:

- Small squares on the icons on the site monitor show the current status of each item on the form: green = okay; red = problems; grey = not known.
- Last known problems are indicated above the layout by a red **RESET** button alongside an error message. If there have been no problems, the box is grey and empty.
- A **Current events log** shows details of all errors/events identified since the site monitor started.
- An **Activity log** shows details of recent errors and events within the polling program on the PC.

In addition, hovering the cursor over an icon will display a status message of either **Active** or **Error** for that item. An example form showing an error might be as follows:



The error message at the top informs you that Poller 1 is not responding. This is also shown by the red square next to that poller in the display, and the **Error** hint that appears when the cursor is hovered over it.

The red button allows you to **RESET** the display.

22.1.1 Current events log

The **Current events** log is shown to the right of the site monitor. It shows the most recent activity within the polling program, commencing with the time the program was last started. It also shows events such as when table downloads to terminals were initiated (e.g., employee details being sent to terminals), when terminals were synchronised, as well as errors within the terminals.

On the example above, it can be seen that the polling program is not responding, normally indicating that it is not running. The second event listed corresponds to the time when the site monitor was refreshed (by selecting **Refresh layout** from the **File** menu), when the poller was still not responding. This confirms the error message displayed in the site monitor layout.

22.1.2 Activity log

The **Query activity** log is a larger version of the **Current events** log, and can show events over a longer period. In addition, an individual terminal can be selected to display all events associated with that terminal.

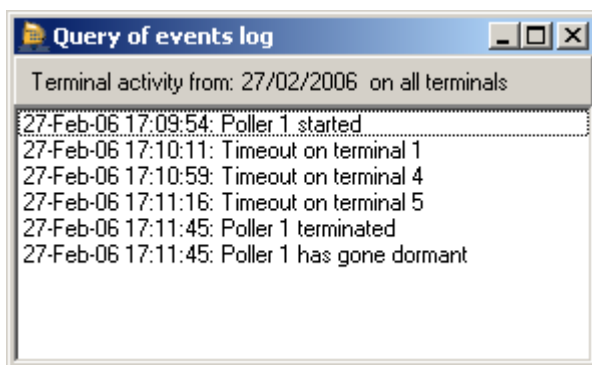
To display the activity log, select the **Query activity log** option from the **Control** menu. The following form will be displayed:



The log will show all activities (tasks performed by the poller) that took place between the date entered in the **View activity since** box and the current date.

Tick the box if you want to see **All** terminals on the log. If the box is not ticked, a drop-down list appears from which you can select just an individual terminal to be displayed.

Click **OK**, and you will see a log like this:



This example shows all the events that have occurred since 27/02/2006 on all terminals.

22.2 Commands

A command is an instruction to the polling program to perform a particular task outside normal scheduled events, and can be issued at any time. It can be applied globally (i.e., to all terminals on the network) or to an individual terminal. This choice affects the type of command that can be issued. A summary of all commands is as follows:

| No. | Command | Description | Used by |
|-----|---------------------------|---|---------------|
| 1 | Cancel transfers | Used to cancel any time-consuming table downloads that are not really necessary. | PC only |
| 2 | Configure | If any terminal function has been altered then the new configuration needs to be sent to the terminal. | PC & Terminal |
| 3 | Download employee details | Sends employee information to terminal to determine whether the employee is valid. The information is displayed when employee registers. | PC & Terminal |
| 4 | Download timezones | Used for access control systems. Sends details of when employees are allowed access. | PC & Terminal |
| 5 | Download works rules | (Flexitime only) Sends details of shifts so a flexitime balance can be calculated at the terminal. | PC & Terminal |
| 6 | Poll (empty clocks) | Mainly for terminals linked via a modem. Retrieves all clockings from it. | PC & Terminal |
| 7 | Recover clockings | Normally used when employee data has been restored from a backup and you need to ask the terminals to re-send all clockings from a specified date. | PC & Terminal |
| 8 | Refresh poller | If you change the properties of terminals then you must tell the polling program to read the new values. Could do the same thing by using the send dormant command. | PC only |

| | | | |
|----|---------------------------|--|---------------|
| 9 | Send poller dormant | Stops the poller for a specified amount of time to allow a backup of the TMS data to be done. | PC only |
| 10 | Stop poller | Stops (closes) the poller. | PC only |
| 11 | Synchronise clocks | Sets time on terminals to that on PC. Ensure time on PC is up to date before this is attempted. | PC & Terminal |
| 12 | Door control | Opens/closes a group of doors in event of emergency. | PC only |
| 13 | FES BST change | (Fire evacuation systems only) Adjust time for BST time change. | PC only |
| 14 | FES download descriptions | (Fire evacuation systems only) Downloads names of departments, job grades etc. to FES PC. | PC only |
| 15 | Master reset | Performs a master configuration on the terminal. (PLEASE BE AWARE THAT THIS DELETES ALL THE CLOCKINGS AND TABLES THE TERMINAL MIGHT HOLD - USE WITH EXTREME CAUTION.) | Terminal only |
| 16 | Refresh single employee | For access control. Downloads new details for one employee. | PC & Terminal |
| 17 | Remove badge | For access control. Removes specific badge ID at terminals. | PC & Terminal |
| 18 | Remove employee access | For access control. Removes a specific employee's access at terminals. | PC & Terminal |
| 19 | Send employee message | Sends a message to the terminal for a single employee. | PC & Terminal |
| 20 | Synchro for master | Causes poller to synchronise all clocks to the master clock (if installed). | PC only |

22.2.1 Issue a command

The commands available on your system can be accessed by right clicking on the relevant PC icon (on the **Site monitor** form) and selecting **Add command**. A sub-menu contains a list of all the commands that you can issue. Select the required command and it will be applied to all terminals attached to the polling PC.

Once selected, most of the commands will display a form similar to the following:

The image shows a 'Job details' dialog box with a blue title bar and a close button (X) in the top right corner. Inside the dialog, there is a 'Job type' dropdown menu currently showing 'Synchronise clocks'. Below this is a section titled 'Terminals on this poller' which contains a 'Term Ref:' dropdown menu set to '1'. To the right of these fields are two buttons: 'OK' with a pencil icon and 'Cancel' with a blue X icon.

In this example, the **Synchronise clocks** command will be applied to **All** terminals, this being the default setting.

If the command is only to be applied to an individual terminal, remove the tick from the **All** box, and select a terminal from the drop-down list that appears.

(Note that other commands may display a form which requires more information. For example, a **Recover clockings** command will need a date and time from which to recover any clockings.) Then click **OK** to add the command to the **Automatic job scheduler/Command list** (see below), of tasks for the polling program to process.

NB: It is important to ensure the polling programs are running prior to issuing the above commands. If not, the commands remain on the command list until the polling program is started, at which time the

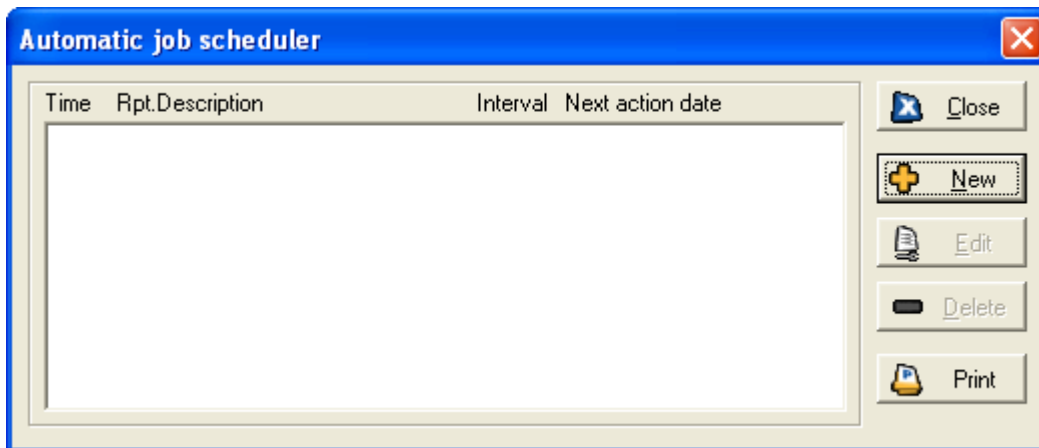
jobs are executed in the order they were issued. This could result in commands being processed unnecessarily.

Commands can also be issued from the **Command list** (see **Modify the command list**, below).

22.2.2 Automatic job scheduler/Command list

The **Command list** (or **Automatic job scheduler**) is a list of tasks that the polling program has been instructed to perform (see above). This list can be displayed by selecting **Command list** from the **Control** menu on the main site monitor form, or by choosing **Command list** from the menu produced after right-clicking on a PC icon in the display.

The list looks like this:



22.2.3 Modify the command list

Add a command

To add a new command to the list, select **New** to display the following form (the actual layout of the form may vary depending on the type of job selected):

The drop-down list at the top of the form allows you to select the **Job type** from all those available on your system (the options will include some of those listed in **Commands** (see page 258), as well as the additional command 'FES BST change').

Select the **Job frequency**. If **Repeat other** is selected, a box allows you to enter the number of days between the jobs.

In the **Next action at** section, enter the time and date when the command is to be executed. If **Repeat daily** or **Repeat other** were selected as **Job frequency**, this is the base date and time for the repeated jobs to be performed. If **Manual** or **Temporary** were selected, you can click the **Now** box to put the command at the start of the job list.

Tick the **All** box if you wish the command to be applied to all **Terminals on this poller**, or remove the tick and then select an individual terminal from the list that is displayed.

Edit or delete a command

Commands already on the list can be modified or deleted by highlighting the required command and then selecting either **Edit** or **Delete**.

From the **Edit** option, the **Job details** form (as shown above) is displayed, with the exception that the **Job type** field is disabled. Change any other details in the same way as described above.

Clicking **Delete** produces a confirmation box, prompting you as to whether you wish to confirm the deletion of this command from the list.

22.3 Error messages

Below is a list of common error messages associated with the polling PC and terminals, that might be displayed either on the site monitor form, or in the **Current events** or **Activity** logs. Please contact the Mitrefinch support desk if you are in any doubt about an error message that is displayed. The descriptions detailed in the **Remedy** column are intended as a guide to the most basic steps that can be followed in an attempt to remedy the problem.

| Message | Description | Remedy |
|--|---|--|
| Poller x not responding | No response has been received from the polling program running on PC x. | Check that the polling program is running, re-starting if necessary. If the polling program is busy performing table downloads, wait until such have finished and then re-check the status. |
| Timeout on terminal x | No response has been received from terminal x. | Check that there is power to the terminal. If similar messages are shown for all terminals attached to the PC, check that the line driver interface is switched on and that all cables are securely attached to it and the PC. |
| Comms error on terminal x | There is intermittent communications with terminal x. | Contact Mitrefinch for assistance. |
| Invalid Parameter: Control PC number <x> | The polling PC has been incorrectly defined. | Contact Mitrefinch for assistance. |
| Could not open comms port <x> | The defined serial port is either invalid or currently in use by another application. | Contact Mitrefinch for assistance. |
| Badge <bbbbbb>/<v> not found | A badge has been used on a terminal that has not been defined within the database. | Dependent upon circumstances. |
| Badge <bbbbbb> invalid action <a> | The action associated with a particular | Change the terminal key mappings to use a valid action (see the system administrator). |

| | | |
|--|---|--|
| | terminal/function key has been incorrectly defined. | |
|--|---|--|

22.4 Modems

If there are terminals on remote sites it is possible to poll these clocks via modems. Because external telephone lines are expensive, the connection to a remote clock is not open all of the time. Therefore, the terminals are polled at specific times during the day (usually only once, but twice if there is a night shift). It is important that this polling process is performed before the daily processing otherwise the work records for the employees at the remote sites will not be calculated until two days later.

To poll a remote clock, issue a command to **Poll (empty clock)** (see **Issue a command**, page 259, for details). This will open the connection just long enough to empty the terminal of all its clockings.

When the jobs **Download employee details**, **Download timezones** and **Synchronise clocks** are performed, the modem link will automatically open (therefore you do not need to do anything special with these tasks).

23 Fingerprint reader

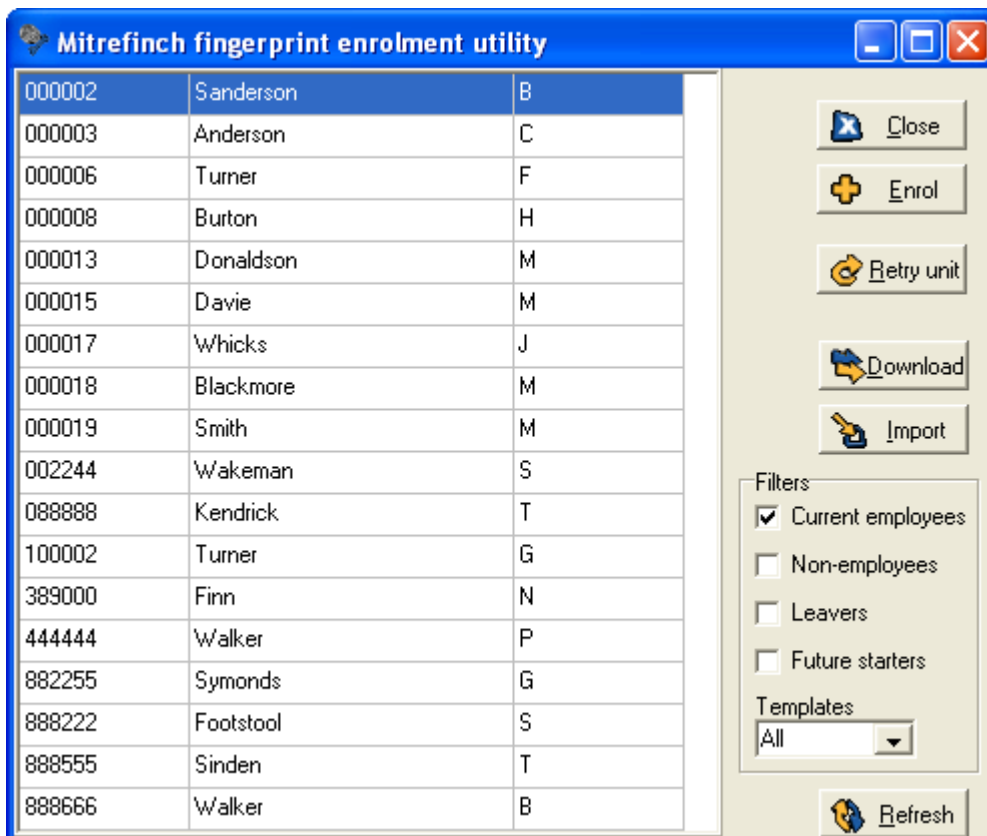
23.1 Enrol fingerprints

It is important that fingerprints are initially enrolled as accurately as possible so that there is the maximum room for error when the employee uses the fingerprint reader at the terminal.

The program that is used to enrol the fingerprints prior to download to the terminals is **FINGER.EXE**. Open this by selecting the icon from the WinTMS folder:



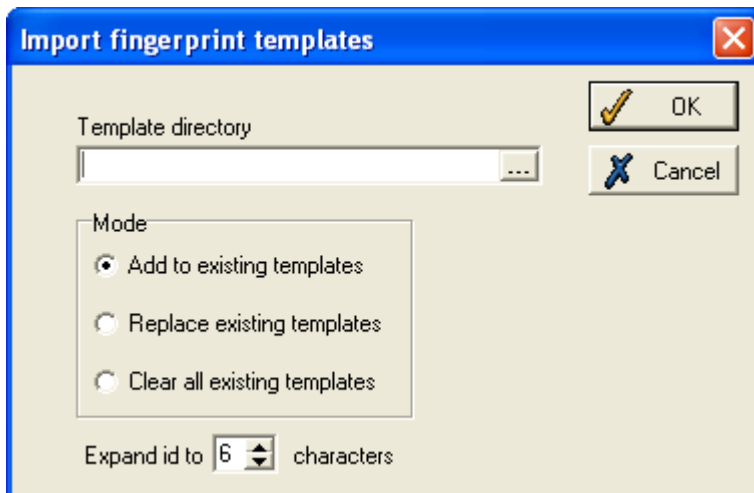
A list of employees on the system will be displayed:



| ID | Name | Category |
|--------|-----------|----------|
| 000002 | Sanderson | B |
| 000003 | Anderson | C |
| 000006 | Turner | F |
| 000008 | Burton | H |
| 000013 | Donaldson | M |
| 000015 | Davie | M |
| 000017 | Whicks | J |
| 000018 | Blackmore | M |
| 000019 | Smith | M |
| 002244 | Wakeman | S |
| 088888 | Kendrick | T |
| 100002 | Turner | G |
| 389000 | Finn | N |
| 444444 | Walker | P |
| 882255 | Symonds | G |
| 888222 | Footstool | S |
| 888555 | Sinden | T |
| 888666 | Walker | B |

In the **Filters** section on the right, tick the box for each category of employees you wish to be included in the list. Then use the **Templates** box to specify further which employees to show: **Yes** for those who already have templates, **No** for employees who do not have templates, or **All** for all employees in the selection.

If fingerprint templates for an employee have previously been stored elsewhere, use the **Import** button to import them into the table and add them to an employee's record. The following form should be displayed:



To register an employee's template for the first time, select the employee in the list and click **Enrol**. The employee's template selection screen will be displayed:



This employee does not have any fingerprint templates as yet. Up to five can be entered, but only one is usually required. To enrol a new fingerprint template, click the **Add new** button. This screen is displayed:

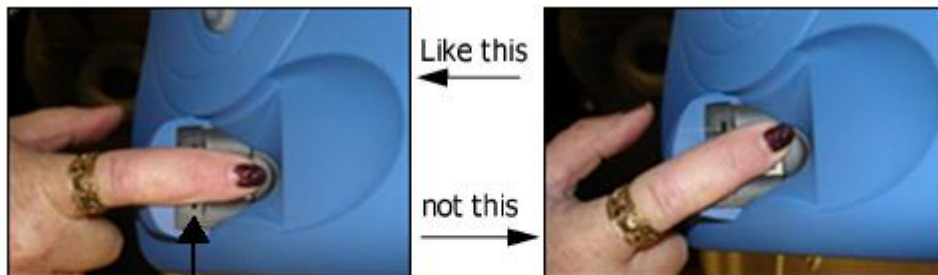


On-screen instructions will guide you through the enrolment process. It is crucial that the fingerprint is enrolled as accurately as possible, or else the employee may encounter difficulties at the terminal.

23.1.1 How to enrol a fingerprint

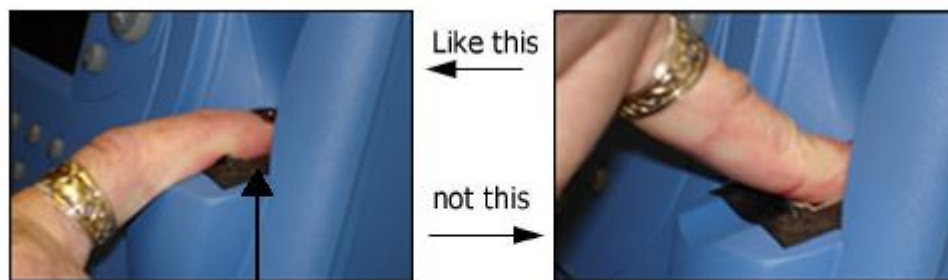
First, decide which finger to use for the fingerprint. It is strongly recommended that you use the **index**, **middle** or **ring** finger.

Rest the first joint of the finger on the Ridge-Lock (as displayed in the example). Hold the finger **straight**, not skewed. Drop the finger onto the sensor, using **moderate pressure**:



The Ridge-Lock,
where the first joint
of the finger rests.

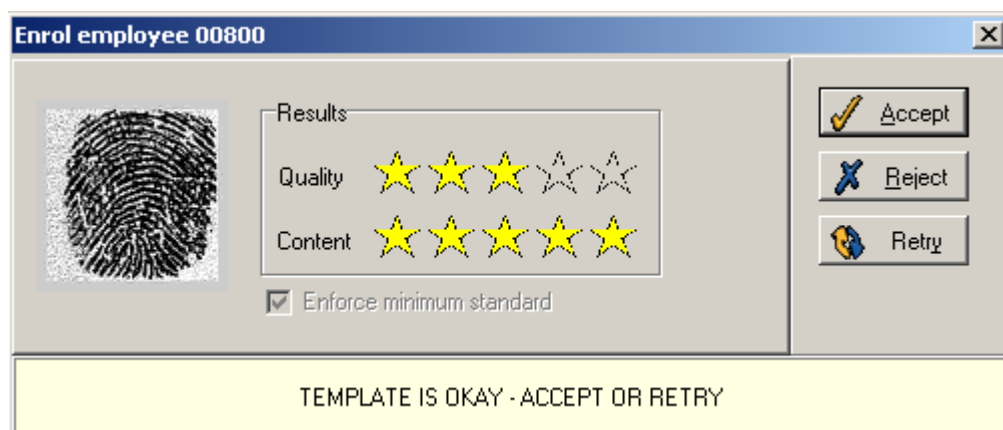
Hold the finger **flat**, not as if pushing a button. The finger should cover the reader completely:



Completely cover the
sensor with the finger.

Keep the finger held on the reader until the system says it can be removed (which will be a couple of seconds after the 'beep', if positioned correctly).

A few seconds afterwards, the fingerprint is registered and converted to a template to be stored in the database. The following screen displays the result of the print:



Quality is determined by the definition of the print - this will be low if the image is too dry, or if the finger was applied with insufficient pressure.

Content is determined by how much of the 'fingerprint core' is in the template. This will be high if the finger was applied in the correct position. It will be low if the finger was placed incorrectly (e.g., as if pushing a button), or if the finger was on the edge of the reader.

Three stars or above for both quality and content is acceptable. If the image looks reasonable, click **Accept**. If not, click **Retry** and repeat the process, ensuring the finger is applied in the manner described.

23.1.2 Complete the enrolment and verify

When a good fingerprint template has been created, and accepted, this form is displayed:

Make sure the details of the print are correct, and click **Accept**.

Once the fingerprint has been accepted, it should be tested a few times, to ensure that it will work at the terminal. To do this, click the **Verify** button. The following form appears:

Place the same finger on the reader again. If a good match is created, a screen like this will be shown:



This verification shows that the fingerprint works well, and should do the same when used at the terminal. Do not be concerned if the fingerprint is not read successfully every time it is tried at the terminal, as a certain amount of human error is involved with each reading.

If the table that holds the fingerprint template does not exist then it will be created when this program starts.

For the employee to be able to use the fingerprint reader at the terminal, the new templates must be downloaded. This happens during the normal employee details download, which should be scheduled to occur on a regular basis (e.g., every night at a set time). However, if it is necessary for the employee to be able to use the fingerprint immediately, then use the main employee list (the one shown upon starting FINGER.EXE) to select the appropriate employee and click the **Download** button.

24 Processing

The processing task is the means by which employee clockings are used to create a daily work record, showing hours to be paid at the appropriate rates, late arrival, early leaving, absence etc. It has been designed to operate in the background so that it can be left running, thus providing the above processing without any need for operator intervention. It can also be used to produce reports created by the user, within the **Custom reporting** option, these being timed to run on a regular basis, e.g., every morning at a set time (for details on custom reporting, see the **TMS Report Writer** manual).

You will not normally need to use the processing options detailed in the following sections unless you are the system administrator. The system administrator, or whoever has been given access to the **Process** option, will activate the processing (and the **Start clock polling** option) at, for example, the start of each day.

The processing obviously requires up-to-date clocking information in order to calculate hours correctly. However, if the polling is not functioning correctly then the processor has been designed to automatically recalculate records when clockings arrive late.

The processing can be run on a dedicated PC, on the same PC as the polling program, or on a user's PC. When using the latter, it is important that the user is aware that the process option is in operation and that it must be left running.

24.1 Start the processing

Depending upon the setup of your system, you can either initiate the processing when you first enter TMS, or manually at a later stage.

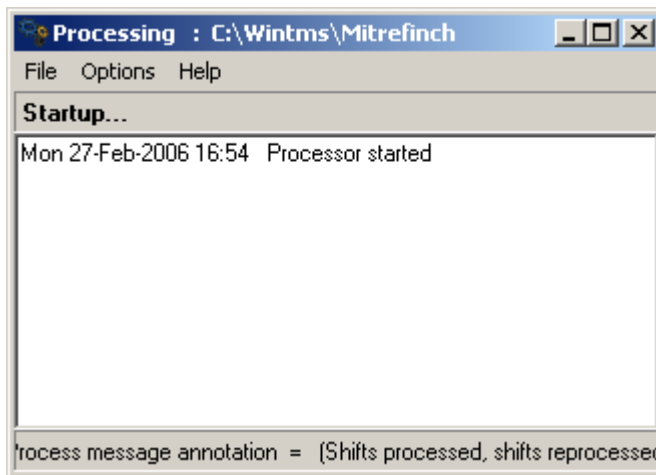
If you run TMS on a single machine, you will be allowed to start the processing when you log in to the system. Upon entering your user name and password, tick the **Start automatic processing** box to activate the processing.

If you need to activate the processing manually (if, for example, TMS is run on more than one machine), select the **Process** icon from the Mitrefinch folder:



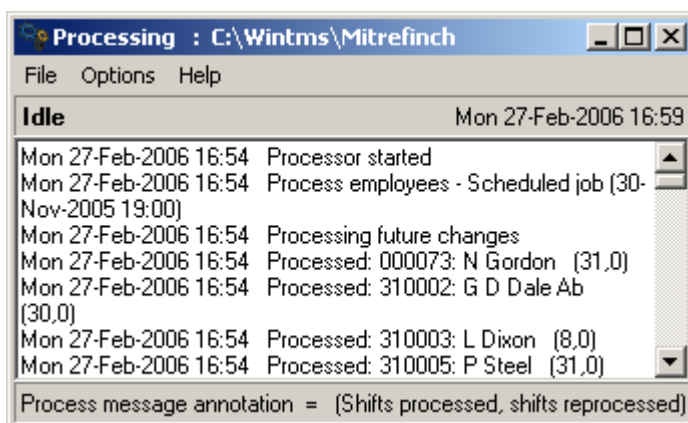
or follow another method if recommended by your system administrator.

Once selected, the **Process** option will either minimise (display as an icon at the base of your screen) or immediately display the main **Processing** form, again depending upon the setup of your system:



Once started, the processing will check its internal job scheduler and settings to determine when it is required to start processing. If a job, or jobs, have been scheduled to occur early in the day, these will be done first. If the jobs are scheduled for later in the day, they will take place when the appropriate time is reached.

As each employee is selected for processing, an indication of the progress is displayed on the main form, along with any error messages that might occur. For example:



For further details of the messages that are displayed on this form, see **Processing messages**, page 270.

24.2 Cancel the processing

The processing can be cancelled at any time, but you must be aware that if cancelled during the middle of processing, up-to-date system information will not be available for some, or all, of the employees.

To cancel the processing, open the **File** menu and click **Exit**.

24.3 Instruct the processing to 'catch up'

Once the processor has been opened, the time at which it will automatically start to perform any processing (taking into account any time delays, such as allowing clockings to be recovered), will have been previously determined by the system administrator. There may be times when it is not possible to wait for the processing to be initiated automatically, e.g., when the processed clockings for the employees are needed immediately. In this event, you can manually instruct the processing to 'catch up' immediately and process all new clockings.

To 'catch up', open the **File** menu and select **Catch up now**. The **Processing** form (above) will now include any recent clockings.

24.4 View Poll/Process log

You can view the activities of the poller and processor by selecting the main **TMS Admin** menu and then selecting **View Poll/Process log**. A form similar to the following will be displayed, showing the latest actions of the poller and processor:

| Date & time | Description |
|---------------------|-------------------------------|
| 04/02/2008 10:18:25 | Poller Started on TESTINGPC |
| 04/02/2008 10:18:29 | Failed(Timed out): [1] F E S |
| 04/02/2008 10:18:36 | Poller Stopped on TESTINGPC |
| 04/02/2008 10:18:48 | Poller Started on TESTINGPC |
| 04/02/2008 10:18:52 | Failed(Timed out): [1] F E S |
| 04/02/2008 10:18:53 | Poller Stopped on TESTINGPC |
| 04/02/2008 10:21:19 | Poller Started on TESTINGPC |
| 04/02/2008 10:21:24 | Failed(Timed out): [1] F E S |
| 04/02/2008 10:21:52 | Poller Stopped on TESTINGPC |
| 27/03/2008 09:42:41 | Processor - Processor started |

You can use the radio buttons at the head of the form to view the activities of either the poller, the processor or both.

24.5 Processing messages

The various messages that may be shown on the processing form are detailed below. Each one will start with the date and time, followed by the message. Two types of message may be displayed: general information and warnings.

24.5.1 General information messages

The general information messages that are displayed explain the actions of the processor. For example:

Process employees - Scheduled job

indicates that the processor has commenced processing all employees at the time that was specified in its list of automatic jobs.

When the processor is running, the following message will be displayed for each employee:

Processed: <Employee badge number> (x,y)

This message explains that **x** new records have been created and **y** old records have been recalculated due to clockings being added since the initial processing.

For example:

Processed: 00900 (1,0)

Here, the records for an employee with the badge number of '00900' have been processed, creating one new record (no older records needed reprocessing).

24.5.2 Warnings

These warnings explain any errors that have occurred during the processing of employee records. These warnings are not necessarily problems but give an explanation of an irregularity that you need to be aware of.

For example:

Unable to use clocking in checked daily work record

This means that a clocking has been added to a work record after the record has already been processed, but a user had already authorised the anomaly that was created (e.g., missed clocking) due to the clocking not being there originally.

Other warnings that may appear include:

Unable to use clocking - record in previous period

The system does not use clockings that have appeared late and which belong to the previous period (see **Period ends**, page 150, for details).

Unable to use clocking after employee left

A clocking has been made by an employee after the leaving date defined in his or her main personal details record.

If any errors other than those described above occur within the processing, please contact Mitrefinch for further assistance.

25 European working time directive features

TMS supports the EWTD in a number of ways.

(Please note that the regulations may be subject to change.)

The European Working Time Regulations have been introduced to:

- limit an employee to working no more than 48 hours in each week (usually averaged out over a 17 week period).
- make sure that employees have rest periods of not less than 11 consecutive hours in each 24 hour period.
- make sure that employees have uninterrupted rest periods of not less than 24 hours in each 7 day period, or not less than 48 hours in each 14 day period.
- make sure that the hours worked by a night worker does not exceed an average of 8 hours in any 24 hour period (usually averaged out over a 17 week period).
- make sure that employees are allowed a minimum of 15 days' paid holiday in any one year.

TMS supports these regulations in the following ways:

- it can produce reports to show employees' average hours over a specified reference period (e.g. 17 weeks) – see the 'TMS Report Writer' manual for details.
- it can perform tests on any roster to see whether an employee's working pattern complies with the regulations - see Chapter 14 Shift Patterns (Rosters), in the 'TMS System Manual' for details.
- it enables an employee to be marked as a night worker (for reporting purposes) – see **Employee details**, page 49, for details.
- it enables an employee to be excluded from the Working Time regulations (an employee can decide to 'opt out') – see **Employee details**, page 49, for details.

26 Security

A range of security measures in TMS controls which employees have access, for viewing purposes and in some cases for editing as well, to the different parts of the system and the reports generated by the system.

26.1 User profiles

TMS user profiles control the areas of WinTMS that can be accessed by each user of the system. They allow you to specify that certain functions, e.g., the **System** menu, are hidden from some employees while being accessible to others. This is achieved through setting up a range of user profiles, each with their own access rights, and assigning each user of the system to an appropriate profile.

The user profile applies not only to WinTMS, but also to all other programs in the package.

To set up or amend a user profile, select **Maintain users** from the **System** menu, and then click the **Profiles** icon. Select the relevant profile from the list, and click the **Modify** button. The following form will be displayed:

The screenshot shows the 'Edit profile' dialog box. The 'Profile' dropdown is set to 'FULL'. The 'Description' text box contains 'Full access'. The 'Users affected by the selected profile' area is an empty white box. The 'General options' section includes a 'Security level' dropdown set to '0', and checkboxes for 'Simple display' and 'Modify screen history'. The 'Web options' section includes a 'Default web page' dropdown set to 'Check requests', and checkboxes for 'Is accessibility profile' and 'Timesheet requests'. The 'TMS Options' section includes checkboxes for 'Enable screen setups', 'Privileged', 'Edit hours band times', and 'Export capability'. The 'Onsite Preferences' section includes checkboxes for 'Hide Clockings/Absence column' and 'Simple Onsite display'. The 'Other sections' panel on the right contains several sub-sections: 'General' with buttons for 'Menu rights', 'Panel rights', 'Field rights', and 'Authorisation rights'; 'TMS' with buttons for 'Hours codes', 'Additional payments', 'Clock card', 'TAS Category order', and 'TMS/.NET reports'; and 'HR Manager' with buttons for 'Reports rights', 'Document rights', and 'Matrix reports'. On the far right, there are three buttons: 'OK', 'Cancel', and 'Help'.

This form allows you to amend access rights for the user profile in question. You can see the users affected by the selected profile in the box on the right hand side of the form.

General options

You can set a **Security level** for the user, relating to access to reports. If you tick **Simple display** the user will not be able to see the group and employee toolbars when TMS opens, and will ensure that a user can only open one window at a time within TMS. Tick **Modify screen history** to give employees

the option to edit their screen history. See **Viewing historical information** on page 40 for more details.

TMS options

Enable screen setups allows the user access to setup options on right-click menus throughout the system. A **Privileged** user can edit past calculations on the system without having to use a password. You can also define whether the user can **Edit hours band times** on their work record. Lastly, define whether the user has the capability to export from the system.

Onsite Preferences

These are related to the makeup of the **Onsite/Absent list** form. See page 65 for details. If you tick the **Hide Clocking/Absence column** option, this column will not appear on the **Onsite/Absent list** form. If you tick the **Simple Onsite display** option the additional options on the top of the **Onsite/Absent list** would be hidden from view.

Web options

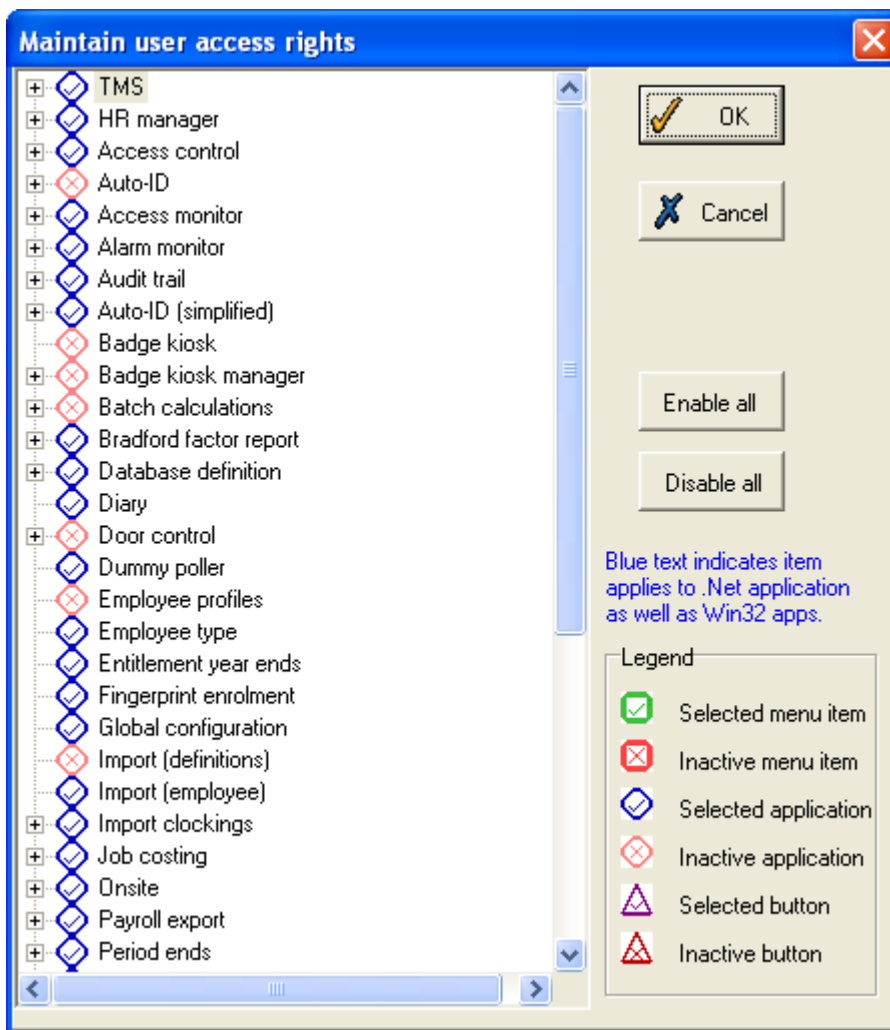
You can determine the TMS user's access rights for T&A.NET on this section of the form. See **Employee web profiles** on page 283 for more details.

Other sections

The buttons on this section of the form allow you to determine the employees' access rights further:

Click the **Menu rights** button.

When setting up a user profile, you will see a 'tree' view of the programs and menu options that are available on the system, showing which are accessible to this user profile:

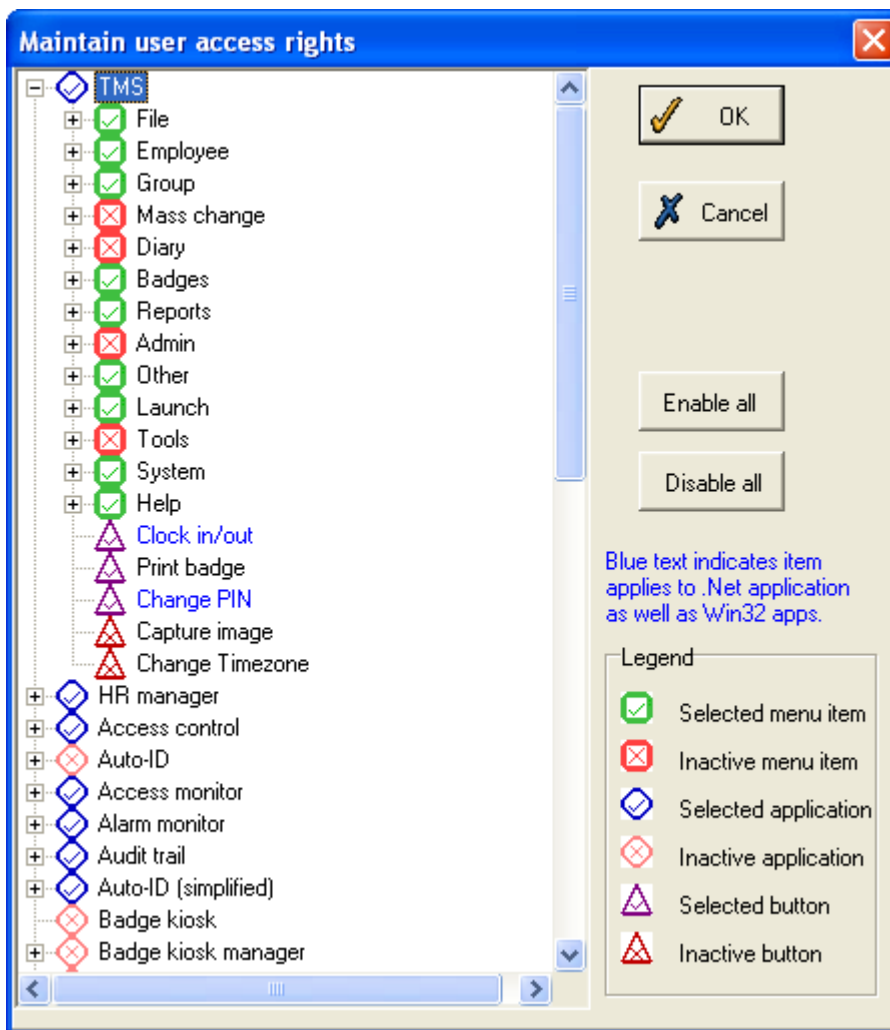


This list contains each application in the Mitrefinch package, showing whether this user profile has access or not. With the tree collapsed the list shows all the programs covered by the security system.

The icons are used to identify both the state (a tick indicates that access is allowed and a cross that access is prevented) and the type of option being controlled (a diamond shape is a program, a square a menu item and a triangle a button).

The programs that do not have a plus symbol next to them are protected simply by restricting which users can log in.

For those that do have a plus symbol, click on the plus to expand the application, and you can then enable or disable the options within the program. For example:



Here, the 'TMS main employee form' (i.e., WinTMS) has been expanded, and all the menus are listed (in this case, all are allowed), in the same order as they appear in the program. A menu itself can be selected or disabled, or the menu can be expanded and the individual items on it set to the required status. Individual buttons are also shown at the end of the list, and can be selected or made inactive.

To change the status of a program, menu item or button, right click on its icon. It will then change to the opposite state. Changing the status of an item will change all the items below it in the tree (e.g., disabling a program automatically disables all menus and buttons in that program).

However, enabling an item causes all items above it in the tree to be enabled as well (e.g., if you enable a menu within a disabled program, the program itself becomes enabled also).

The buttons on the right should be used with care. Using them, you can quickly **Enable all** or **Disable all** programs, menu items and buttons for the current user profile.

Care should also be taken when changing the status of crucial items. For example, it is possible to remove the **Exit** item from the program, or allow a person access to programs but no options once in those programs.

The user should notice no difference. If he or she does not have access to a program called from another program then the menu option will not work even though it may appear to be active.

Click on the **Panel rights** button on the **Edit profile** form.

| Available | Selected | Read only |
|-----------|----------|---|
| | ACSEMP1 | Main <input type="checkbox"/> |
| | ADOPT | Adoption leave <input type="checkbox"/> |
| | APP | Appraisal details <input type="checkbox"/> |
| | APPMAIN | Details <input type="checkbox"/> |
| | BENEFIT | Benefit Details <input type="checkbox"/> |
| | CONTACT | Contact points <input type="checkbox"/> |
| | CONTR2 | Contract Auto Update <input type="checkbox"/> |
| | CONTRACT | Contract Details <input type="checkbox"/> |
| | DI | Discipline details <input type="checkbox"/> |
| | DOCTOR | Doctor <input type="checkbox"/> |
| | EMPADDR | Address <input type="checkbox"/> |

You can use this form to define which panels within a menu are accessible to the user. Move panels from **Available** to **Selected** or back using the arrow buttons. Tick the **Read only** box to prevent the user from altering these panels.

Click on the **Field rights** button on the **Edit profile** form. The following form should be displayed:

| Field/Table | Access Status |
|-------------------------------------|----------------|
| ADOPT (Adoption leave) | Editable field |
| AP (Appraisal Details) | Editable field |
| CE (Contract/Entitlement Details) | Editable field |
| DI (Disciplinary Details) | Editable field |
| DR (Doctor details) | Editable field |
| EMPPPOOL (Employee pools) | Editable field |
| GR (Grievance Details) | Editable field |
| INV (Inventory Details) | Editable field |
| JD (Job Details) | Editable field |
| KIN (Next of kin) | Editable field |
| MAT (Maternity Leave) | Editable field |
| ME (Medical Details) | Editable field |
| NEEDS (Training needs) | Editable field |
| NOTE (Notes) | Editable field |
| OD (Organisation Details) | Editable field |
| PATADOPT (Adoption leave) | Editable field |
| PATBIRTH (Paternity leave) | Editable field |
| PR (Pay Details) | Editable field |
| QUAL (Qualifications Details) | Editable field |
| RETIRE (Retirement details) | Editable field |
| TMSEMP (Main employee details) | Editable field |
| TMSEMPEN (Employee entitlements) | Editable field |
| TMSEMPIC (Employee picture details) | Editable field |
| TMSEMSG (Employee messages) | Editable field |
| TMSTMS (TMS employee details) | Editable field |
| TMSWRADJ (Work record adjustments) | Editable field |
| TMSWRHRS (Work record hours) | Editable field |
| TR (Training Details) | Editable field |

Legend:

- Editable field
- R Read only field
- Inactive field
- Editable table
- R Read only table
- Inactive table

Use this form to define the user's access to fields in TMS. The **Legend** shows that you can mark a field or table as editable, read only or inactive. To change the status of a field or table to read only,

right click on its icon once. To change the status of a field or table to inactive right click on its icon twice. You can enable or disable all the fields at once by clicking on the relevant buttons.

Tick the **Authorisation rights** button and the following form will be displayed:

| Available | | Selected | |
|-----------|---------|----------|-------------|
| AA | Absence | FT | Message |
| CS | Shift | HR | HR |
| | | WR | Work record |

You can use this form to determine what actions the user can authorise within the system. This is helpful if you wish to restrict a manager's rights so that he or she can only authorise certain actions by their employees. Move options from **Available** to **Selected** or back using the arrow buttons. In the above example, the user cannot authorise changes to employee absences or shifts.

Click the **Hours codes** button to display the following form:

Hours codes will be restricted when editing work records, and when creating and editing shifts.

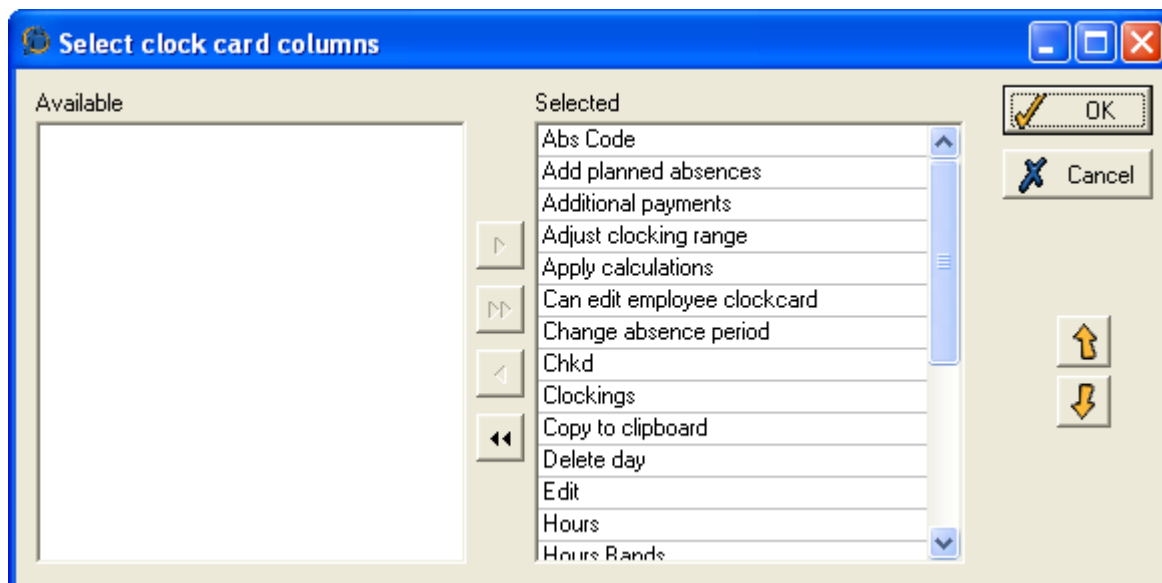
Absence hours codes | Worked hours codes

| ReadOnly | Hidden on absence profile | Editable |
|----------|---------------------------|----------------------|
| | | BH Basic & hours |
| | | LUNCH Lunch |
| | | OT1 Time and a half |
| | | OT2 Double time |
| | | OU Overtime (unpaid) |
| | | P1 Premium 1 |
| | | P2 Premium Hours 2 |
| | | SHIFT Shift |
| | | UP Unpaid |

This form allows you to specify which hours codes can be edited by the user within TMS. Move items from **ReadOnly** to **Editable** or back using the arrow buttons in the centre of the form. You can do this for absence hours codes and worked hours codes by clicking on the relevant tabs.

Click the **Additional payments** button to select payments that can be edited and auto-authorised by the user.

Click the **Clock card** button to display a form similar to the following:



You can use this form to define which parts of the employee clock card in TMS are usable/editable by the user. The items on the **Available** side of the form are read only (code) or unusable (functions) on this profile. The items on the **Selected** side of the form are functions or codes which can be used/changed. Move items from **Available** to **Selected** or back using the arrow buttons in the centre of the form. The arrow buttons on the right hand side of the form can be used to move an item up or down in the list.

To define the order in which Tas categories appear in TMS click on the **Tas category order** button on the **Edit profile** form and make the necessary adjustments.

Click the **TMS/.NET reports** button to select the user's report access rights within the system. You can select the reports to which the user will have access.

HR Manager options

You can define report rights, matrix report rights or letter rights for the user in HR Manager by clicking on the relevant buttons on the **Edit profile** form.

26.2 Maintain access groups

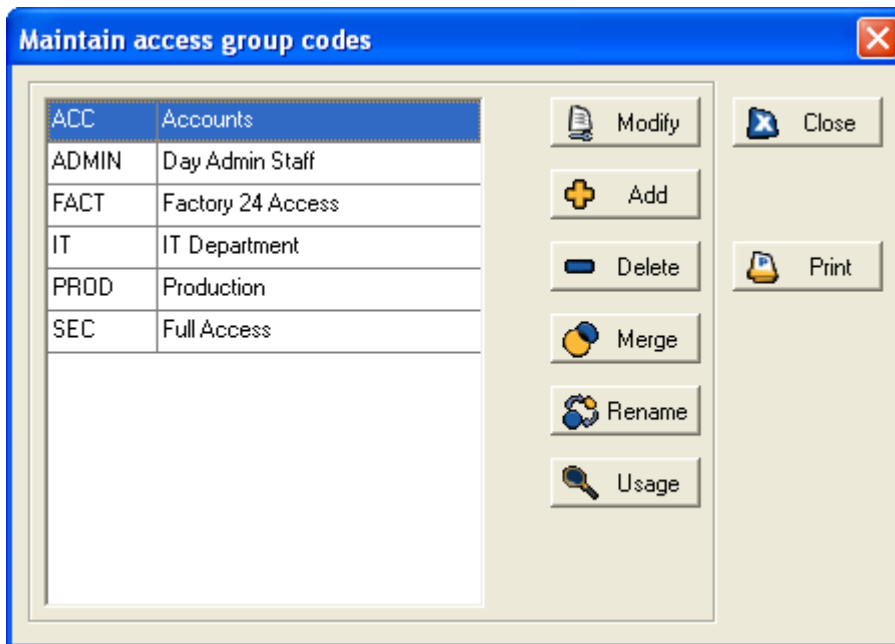
An access group is a group of any number of employees who are given the same level of access through doors or other barriers, at the same times. Each employee can only be assigned to one access group.

Access groups are used in conjunction with 'time zones' which also need to be defined.

Access groups are used to restrict personnel to a specific group of terminals (allowing access to be restricted to certain areas of the site). The access group can, for example, determine whether a person can open a certain door or not, and at which times.

There are two types of access group - general access groups, which can contain any number of employees, and personalised access groups, which apply only to one selected employee.

When you need to add, edit or delete an access group, select **Maintain access groups** from the **System** menu to open this form:



This lists all access groups on your system.

To edit an existing group, select it and click the **Modify** button. This opens the **Modify access group** form for the selected access group, which can be amended accordingly.

It is also possible to create an **Access Group Set**, which consists of a list of access groups. An **Access Group Set** has access to any terminal which can be accessed by **any** of the groups in the set. An **Access Group Set** is definable via the **Maintain access groups** form in the **System** menu, displayed above.

Choose the access group you wish to make part of a set, and then click the **Modify** button. This allows you to modify the parameters of that access group. Select the **Access group set** highlighted in the image below:

Modify access group ADMIN

Details

Description:

Default time zone: <none>

Access group set

Access all terminals

| Terminal | Location | T/Zone | Description |
|----------|-----------------|--------|-------------|
| ▶ 1 | Managers office | 5 | Shop Access |
| | | | |

Now click the field under **Access group** in order to define which terminals this group will have access to. This is particularly useful if you have employees who work in multiple buildings; rather than creating a new access group, they may simply be assigned to an access group set providing access to both buildings.

26.3 Web options

User security has been included in the WEB options. The options available can be set up from within WinTMS. For employee options it is necessary to have a default profile to determine which options are available. A default of WEB was chosen. This can be changed in the **System preferences**.

26.4 Report security

The security used for fields on the **Employee details** form also covers reports. A custom report now has a security level, set on the Report setup form in PayRep. A user can only edit a report if his or her profile has an edit security level greater than or equal to the security level of the report. Otherwise, the Report setup button on the main form of PayRep will be greyed out, and disabled.

Whether or not a user can view a report is slightly more complicated. If the report can be found on the Reports menu of TMS then whether a user can view it depends on whether his or her profile has access to the menu item. If, however, the report can't be found on the **Reports** menu of TMS, a user can only view it if his or her profile's view security level is greater than or equal to the security level of the report.

N.B. It is possible for employee's to view records which contain no value in their security field. This functionality is enabled or disabled by selecting **Maintain users** from the **System** menu, and then clicking the **Users** icon. Select the relevant profile from the list, and click the **Modify** button. A screen similar to the following will be displayed:

Select the **Employee Access** button, and a screen similar to the following will be displayed:

From here it is possible to check or uncheck the box allowing access to empty access groups.

26.5 Hierarchical security

Hierarchical Security allows you to set up an access group control 'hierarchy'. Rather than each user having their access limited through employee codes and groups, each manager may now access the records of employee's below them in their area of responsibility. If an employee changes

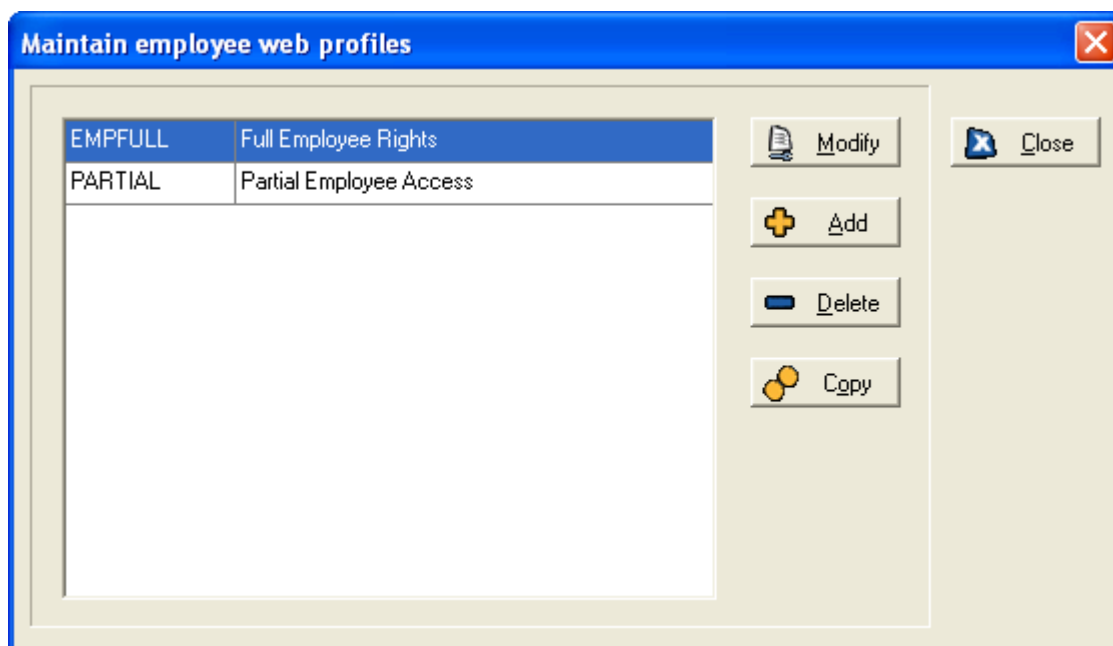
departments, it is no longer necessary to alter all of their details, simply the name of their manager. This is particularly useful in large organisations, where it allows employee access rights and managers to be changed without the need to understand the entire organisational structure.

In order to enable Hierarchical Security, please contact your system administrator.

26.6 Employee web profiles

Employee web profiles allow the system user to define what an employee can view and access within T&A.NET.

To set up or amend employee web profiles, select **Employee profiles** from the **System** menu. A form similar to the following should be displayed:



26.6.1 Modify an employee profile

To modify an employee web profile, select a profile from the list and click the **Modify** button. A form similar to the following should be displayed:

This form allows you to amend access rights for the employee profile in question. You can see the employees affected by the selected profile in the box on the right hand side of the form. Tick the **Set as default** box to set the employee web profile as the default for all new employees added to TMS. You can choose the web page that the employee sees upon opening T&A.NET, using the **Default web page** drop-down list. The **Web clocking** tick box allows you to determine whether the employees are able to clock in and out of work online. Adjustable TAS clockings can be enabled from the employee web profiles through selecting the **Auto-authorise TAS** setting above. The option is only available for those profiles where web clocking is enabled. Enabling this option for a profile not only enables employees on that profile to authorise changes to their own TAS, but also to make TAS clockings retrospectively. Two new boxes will appear under **TAS clocking** in T&A.NET/HR.NET, allowing the date and the time of the clocking to be set. These boxes are set to the current date and time by default, but can be changed by the user. The clocking cannot be in the future, and must be after the end of the most recent processed work record:

TAS - Time Allocation

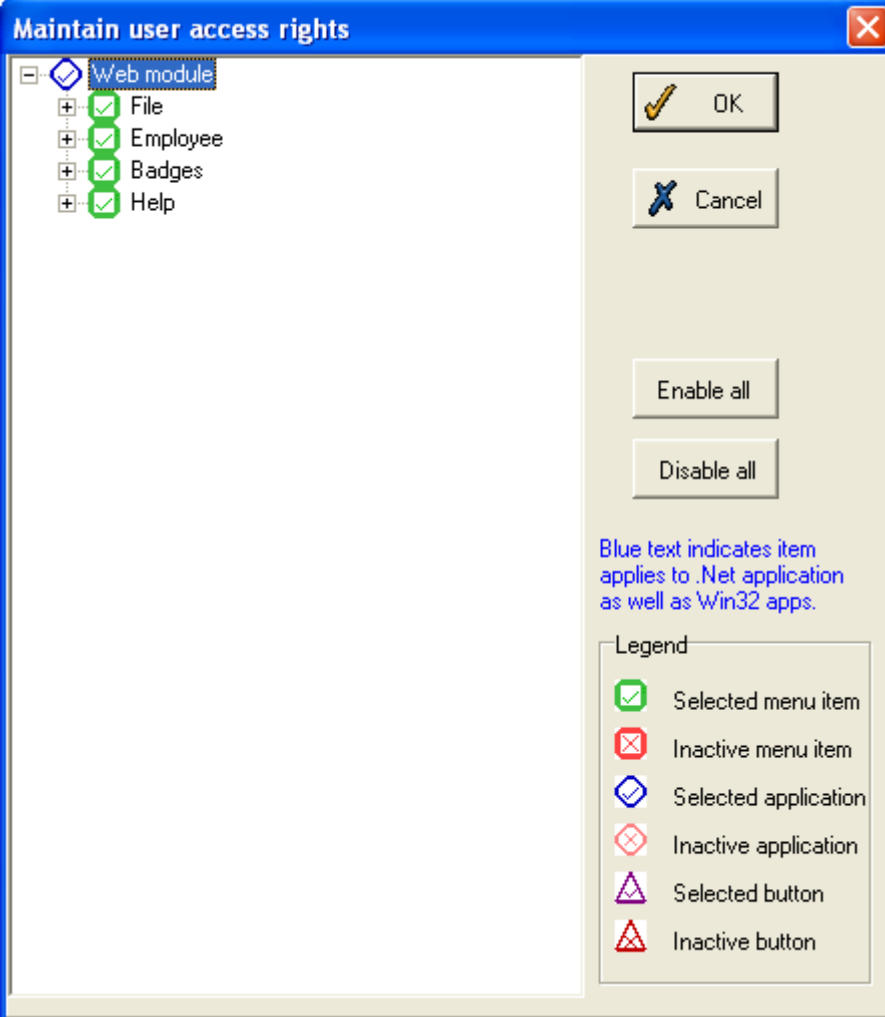
TAS code(s) can also be changed by selecting the new code(s) and clicking "Start job".

Accessible profiles make T&A.NET render its pages in conformance with Web Accessibility Guidelines 2.0. Tick the **Is accessibility profile** option to make the profile accessible.

The **Onsite options** are related to the makeup of the **Onsite/Absent list** form. See page 65 for details. If you tick the **Hide Clocking/Absence column** option, this column will not appear on the **Onsite/Absent list** form. If you tick the **Simple Display** option the additional options on the top of the **Onsite/Absent list** would be hidden from view.

The buttons on the **Other sections** part of the **Edit profile** form allow you to determine the employees' web options further:

Click on the **Menu rights** button to display the following form:



This form works in the same way as the user access rights form for user profiles. For more details see **User profiles** on page 273 You can use this form to define which menu rights and programs are accessible to the employee using T&A.NET.

Click on the **Panel rights** button on the **Edit profile** form.

| Available | Selected | Read only |
|-----------|----------|---|
| | ACSEMP1 | Main <input type="checkbox"/> |
| | ADOPT | Adoption leave <input type="checkbox"/> |
| | APP | Appraisal details <input type="checkbox"/> |
| | APPMAIN | Details <input type="checkbox"/> |
| | BENEFIT | Benefit Details <input type="checkbox"/> |
| | CONTACT | Contact points <input type="checkbox"/> |
| | CONTR2 | Contract Auto Update <input type="checkbox"/> |
| | CONTRACT | Contract Details <input type="checkbox"/> |
| | DI | Discipline details <input type="checkbox"/> |
| | DOCTOR | Doctor <input type="checkbox"/> |
| | EMPADDR | Address <input type="checkbox"/> |

You can use this form to define which panels within a menu are accessible to the employee. Move panels from **Available** to **Selected** or back using the arrow buttons. Tick the **Read only** box to prevent the employee from altering the panels.

Click on the **Field rights** button on the **Edit profile** form. The following form should be displayed:

| Field Name | Access Status |
|-------------------------------------|-------------------------------------|
| ADOPT (Adoption leave) | <input checked="" type="checkbox"/> |
| AP (Appraisal Details) | <input checked="" type="checkbox"/> |
| CE (Contract/Entitlement Details) | <input checked="" type="checkbox"/> |
| DI (Disciplinary Details) | <input checked="" type="checkbox"/> |
| DR (Doctor details) | <input checked="" type="checkbox"/> |
| EMPPPOOL (Employee pools) | <input checked="" type="checkbox"/> |
| GR (Grievance Details) | <input checked="" type="checkbox"/> |
| INV (Inventory Details) | <input checked="" type="checkbox"/> |
| JD (Job Details) | <input checked="" type="checkbox"/> |
| KIN (Next of kin) | <input checked="" type="checkbox"/> |
| MAT (Maternity Leave) | <input checked="" type="checkbox"/> |
| ME (Medical Details) | <input checked="" type="checkbox"/> |
| NEEDS (Training needs) | <input checked="" type="checkbox"/> |
| NOTE (Notes) | <input checked="" type="checkbox"/> |
| OD (Organisation Details) | <input checked="" type="checkbox"/> |
| PATADOPT (Adoption leave) | <input checked="" type="checkbox"/> |
| PATBIRTH (Paternity leave) | <input checked="" type="checkbox"/> |
| PR (Pay Details) | <input checked="" type="checkbox"/> |
| QUAL (Qualifications Details) | <input checked="" type="checkbox"/> |
| RETIRE (Retirement details) | <input checked="" type="checkbox"/> |
| TMSEMP (Main employee details) | <input checked="" type="checkbox"/> |
| TMSEMPEN (Employee entitlements) | <input checked="" type="checkbox"/> |
| TMSEMPIC (Employee picture details) | <input checked="" type="checkbox"/> |
| TMSEMSG (Employee messages) | <input checked="" type="checkbox"/> |
| TMSTMS (TMS employee details) | <input checked="" type="checkbox"/> |
| TMSWRADJ (Work record adjustments) | <input checked="" type="checkbox"/> |
| TMSWRHRS (Work record hours) | <input checked="" type="checkbox"/> |
| TR (Training Details) | <input checked="" type="checkbox"/> |

| Legend | |
|-------------------------------------|-----------------|
| <input checked="" type="checkbox"/> | Editable field |
| <input type="checkbox"/> | Read only field |
| <input type="checkbox"/> | Inactive field |
| <input checked="" type="checkbox"/> | Editable table |
| <input type="checkbox"/> | Read only table |
| <input type="checkbox"/> | Inactive table |

Use this form to define the employee's access to fields in T&A.NET. The **Legend** shows that you can mark a field or table as editable, read only or inactive. To change the status of a field or table to read

only, right click on its icon once. To change the status of a field or table to inactive right click on its icon twice. You can enable or disable all the fields at once by clicking on the relevant buttons.

Click the **Hours codes** button on the **Edit profile** form. A form similar to the following should be displayed:

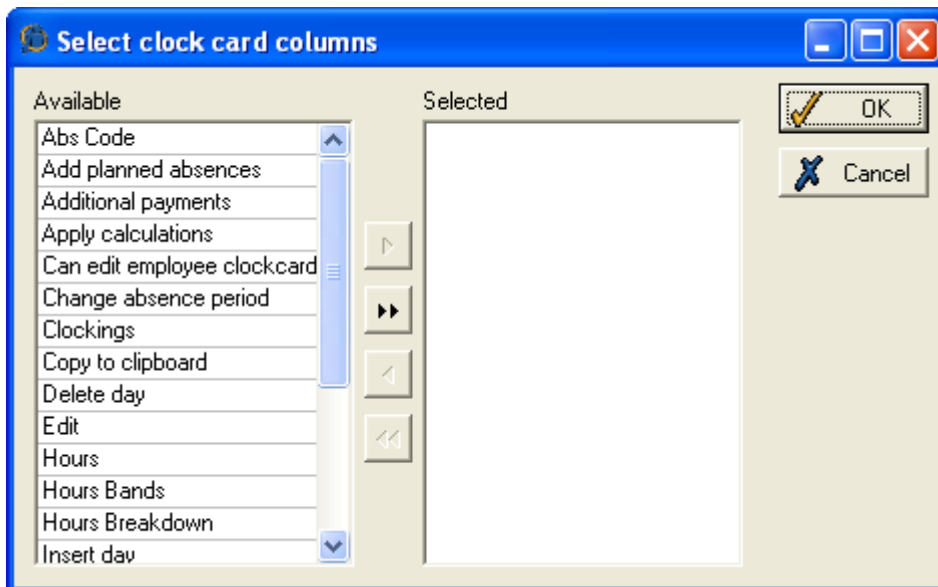
This form allows you to specify which hours codes can be edited by the employee within T&A.NET. Move items from **Readonly** to **Editable** or back using the arrow buttons in the centre of the form. When the hours code has been moved to **Editable**, you can set it to auto-authorise by ticking the box to the right of the field.

Click the **Additional payments** button to select payments that can be edited and auto-authorised by the employee.

Click on the **Clock card** button on the **Edit profile** form. The following form should be displayed:

You can use this form to define which parts of the employee clock card in T&A.NET are usable/editable by the employee. The items on the **Available** side of the form are read only (code) or unusable (functions) on this profile. The items on the **Selected** side of the form are functions or codes which can be used/changed. Move items from **Available** to **Selected** or back using the arrow buttons in the centre of the form. The arrow buttons on the right hand side of the form can be used to move an item up or down in the list.

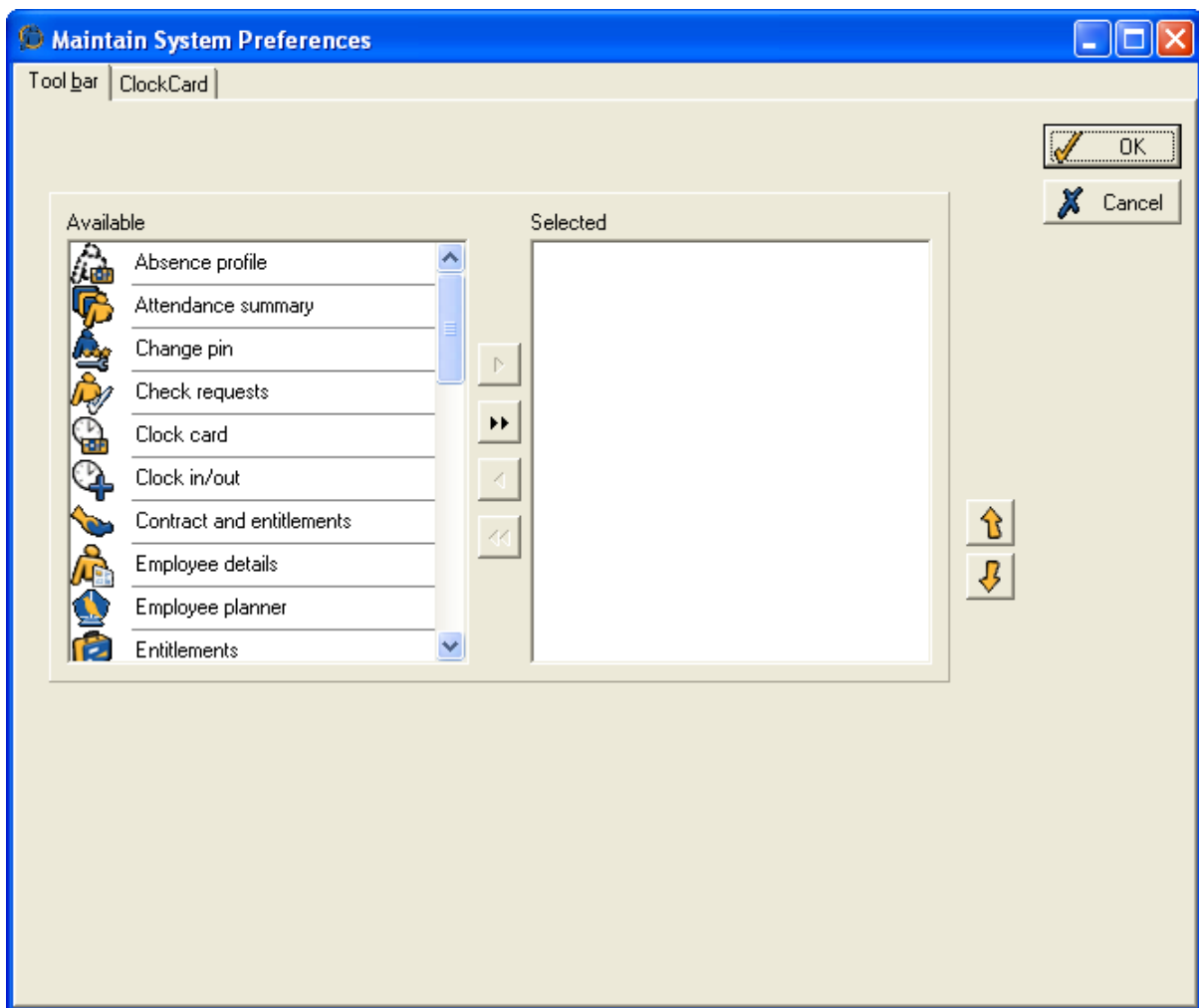
Click the **Clock card auto-auth** button on the **Edit profile** form. The following form should be displayed:



Amendments to features on the employee clock card can be authorised automatically without the approval of a supervisor. This form allows you to define which features are automatically authorised. Move items from **Available** to **Selected** or back using the arrow buttons in the centre of the form.

To define the order in which Tas categories appear in T&A.NET click on the **Tas category order** button on the **Edit profile** form and make the necessary adjustments.

Click the **Preferences** button to display the following form:



You can use this form to define a customised web toolbar for the employees in question. To add to the employee's customised toolbar, simply highlight a menu option in the **Available** box and move it to the **Selected** box using the arrow buttons.

26.6.2 Add an employee web profile

Select **Employee profiles** from the **System** menu to open the **Maintain employee web profiles** form as before. Click the **Add** button to display the following form:

Enter a name for the new web profile and then click **OK**. The following form should be displayed:

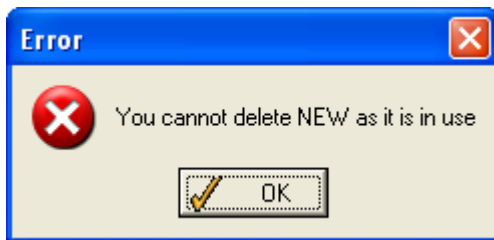
For an explanation of the options on this form, see the previous section **Modify an employee web profile**. Click **OK** when you have entered the relevant details.

Note: the easiest way to assign an employee to a web profile is to open their **Employee details** form and choose the desired profile from the drop-down list displayed below:

26.6.3 Delete an employee web profile

To delete an employee web profile, you must first ensure that all employees affected by that profile have been re-assigned to a different profile. Select **Employee profiles** from the **System** menu to open the **Maintain employee web profiles** form as before. Click the **Delete** button to display the following form:

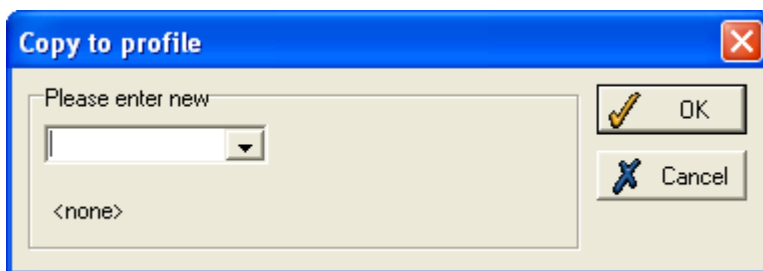
Click **Yes** to confirm. However, it is possible that the following form will be displayed when you attempt to delete a employee web profile:



This means that there are still employees assigned to the employee profile. Make the necessary adjustments and repeat the procedure.

26.6.4 Copy an employee web profile

It is possible to make a copy of an employee web profile. This would be helpful if you wish to assign different rights and preferences for different employees from within the same profile. Select **Employee profiles** from the **System** menu to open the **Maintain employee web profiles** form as before. Click the **Copy** button to display the following form:



Enter the name of the copy of the profile and click **OK**.

26.7 Audit trail

The audit trail is a record of all the changes made on any of the Mitrefinch programs on your system. It records what changes were made and by whom. The audit trail also records all occasions when somebody logged into or out of any of the Mitrefinch programs.

To view the audit trail, select **Audit trail** from the **Launch** menu. This screen appears, which is used to filter the records displayed on the audit trail, making it easier to find the information you need:

To display all recent changes on the system, click **OK**. To filter the records so as to show only the information you need, change the default values in any of these sections of the form:

Report between

In this top section, choose the date range to display the audit trail for. By default, the date range will be the last week. If you need to change this, use the two calendar buttons. Alternatively, click the **Single day** option and you will then be able to specify which individual day to view, and the start and end times within that day.

Include employees

If **All** is selected, audit entries for all employees will be displayed. If the **Match employee** box is selected, you must then select an individual employee. Only changes made to the records of this employee will then be displayed in the audit trail.

If **Match employee** is selected, and no employee is chosen, only those audit entries that do not relate to employees are displayed (e.g., code changes and logins/logouts).

Sort by

This is the order in which the audit records are displayed. The records can be sorted by the date of the change, the type of change, the PC name on which the change was made, or another option. There are two boxes in this section, so two sort levels can be nominated.

Include users

By default, changes made by **All** users are shown on the audit trail. If you select **Match user name**, you can choose to see just the changes made by one user, whose name should then be selected from the drop-down list.

Include change types

You can choose whether to include **All** types of change in the audit trail, or click **Match type** and select just one type from the drop-down list which appears. The types of change that occur in your system depend on what Mitrefinch programs are licensed.

Include client machine

Again, the default is for the audit trail to include changes made on **All** client machines, but you can select **Match PC name** if you only wish to see the changes made on one particular PC. Then select the required PC from the drop-down list.

When you have chosen what to include, click **OK** to open the audit trail, which displays in the form of a spreadsheet:

| ChangeDate | UserId | KeyRef | ChangeType | ChangeDesc | OldVal | NewVal | PC name |
|---------------------|--------|--------|--------------------------------------|---------------------|------------|------------|----------|
| 09/05/2007 10:04:22 | MASTER | | LOG | WINTMS Logged in | | | TECHAUT- |
| 09/05/2007 10:09:49 | MASTER | | LOG | WINTMS Logged out | | | TECHAUT- |
| 09/05/2007 10:12:36 | MASTER | | LOG | WINTMS Logged in | | | TECHAUT- |
| 09/05/2007 10:28:09 | MASTER | | LOG | WINTMS Logged out | | | TECHAUT- |
| 09/05/2007 10:28:16 | MASTER | | LOG | WINTMS Logged in | | | TECHAUT- |
| 09/05/2007 10:31:14 | MASTER | 882255 | EMP | WORKCODE | SHOP | COMPLE | TECHAUT- |
| 09/05/2007 10:31:14 | MASTER | 882255 | EMP | WP | OFFICEDAY | COMPTST | TECHAUT- |
| 09/05/2007 10:31:14 | MASTER | 882255 | EMP | WPBASEDATE | 12/12/2005 | 01/01/2007 | TECHAUT- |
| 09/05/2007 11:02:59 | MASTER | 088888 | EMP | WP | OFFICEDAY | COMPTST | TECHAUT- |
| 09/05/2007 11:02:59 | MASTER | 088888 | EMP | WPBASEDATE | 12/12/2005 | 01/01/2007 | TECHAUT- |
| 09/05/2007 11:02:59 | MASTER | 088888 | EMP: Change via panel for 09/05/2007 | WP | OFFICEDAY | COMPTST | TECHAUT- |
| 09/05/2007 11:02:59 | MASTER | 088888 | EMP: Change via panel for 09/05/2007 | WPBASEDATE | 12/12/2005 | 01/01/2007 | TECHAUT- |
| 09/05/2007 11:32:54 | MASTER | | LOG | reppen Logged in | | | TECHAUT- |
| 09/05/2007 11:37:30 | MASTER | | LOG | reppen Logged out | | | TECHAUT- |
| 09/05/2007 11:39:19 | MASTER | | LOG | reppen Logged in | | | TECHAUT- |
| 09/05/2007 11:40:07 | MASTER | | LOG | reppen Logged out | | | TECHAUT- |
| 09/05/2007 11:40:09 | MASTER | | LOG | WINTMS Logged out | | | TECHAUT- |
| 09/05/2007 11:41:38 | MASTER | | LOG | WINTMS Login failed | | | TECHAUT- |
| 09/05/2007 11:41:43 | MASTER | | LOG | WINTMS Logged in | | | TECHAUT- |
| 09/05/2007 11:54:27 | MASTER | | LOG | WINTMS Logged out | | | TECHAUT- |
| 10/05/2007 10:24:07 | MASTER | | LOG | WINTMS Logged in | | | TECHAUT- |
| 10/05/2007 11:57:15 | MASTER | | LOG | WINTMS Logged out | | | TECHAUT- |
| 11/05/2007 12:44:04 | MASTER | | LOG | WINTMS Logged in | | | TECHAUT- |

The columns show the same information as is explained above, with these additions:

Key Ref - for changes to employee fields, this shows the employee's reference number. For other types of change, this will be blank.

Change Desc - a brief description of the change that was made, or the action that was performed.

Old Value - if a field, code or other value has been changed, this is the old value.

New Value - this is the new value of any field or code that has been changed.

27 Views

Views can help prevent inaccurate data being entered on your system. They are useful on both a large and a small scale. In a large multi-site company, views can eliminate options that are irrelevant to users on a particular site. On a smaller scale, you can restrict options for an individual employee or group of employees.

Views are used to restrict the codes available in lookups (drop-down lists), so that only those relevant to the user and the selected employee can be chosen. This means that not only is it quicker for the user to find the required option, but also mistakes become less common.

For example:

A company has a manufacturing site and a sales site. For the two different sites, there are different rosters, job titles, departments, access groups etc., that are usually exclusive to one or other of the sites.

The vast majority of employees will only ever work on one of the two sites, so, when dealing with these employees, you can, by assigning them to **Employee views**, remove all the options that do not apply to their site.

You can also assign system users to **User views**, so that, when a manager is dealing with issues not directly related to employees, e.g., editing a roster, the user will only be able to access options relevant to his or her own site.

What is true in the above example for a company with multiple sites, is also true of smaller companies which have different departments, divisions, etc., each of which can be assigned to different views so as to limit the options available in lookups.

NOTES:

- Views make the system easier to use by eliminating unnecessary options. They are **NOT** designed to restrict a user's access and should not be used for security purposes. Security should be set in place with user profiles.
- Views do not operate for the MASTER user; this is a safety feature which prevents any codes becoming inaccessible to all users.

27.1 Set up views

To add views to your system, first you must specify which lookups will have their codes limited by views. To do this, open **Database definition** (DBDEF) from the main application folder. Select **Maintain lookups** to view the list of all lookups in your system. When you have selected the required lookup, click **Modify** to display this form (in this example for the **Department** lookup):

Modify lookup

Lookup name: DEPARTMENT

Description: Department

Table name: LUORG

Code length: 10

Desc. length: 40

Complex: Y

Limited by view: Y

OK

Cancel

For views to operate on the lookup, set the **Limited by view** option to **Yes**. Repeat this for all lookups that you wish to be limited by view.

Once you have done this for all lookups you wish to limit by view, exit **Database definition** and open the program as the MASTER user. A new option will have appeared on the **System** menu now that you have lookups that are limited by view - **Maintain views**. Select the option to display a screen like this:

Maintain views

| | |
|------------|-----------------------|
| ACCOUNTS | Accounts only |
| ADMIN | Admin department |
| FULL | All Codes |
| PRODUCTION | Production department |

Modify

Close

Add

Delete

Copy

This form contains a list of the views set up on your system. Any of these views can be assigned to a user.

27.1.1 Modify a view

Select a view from the above list and click the **Modify** button to display the following form:

Description:

Code access

| | |
|------------|--------------|
| BANK | Bank address |
| COMPANY | Company |
| DEPARTMENT | Department |
| JOBTITLE | Job title |
| LINEMGR2 | |
| WORKCODE | Work code |
| WORKSHIFT | Shifts |

Modify

OK
Cancel
Users

This form contains a list of the look-ups which have been set up as **Limited by view**. Select a lookup from the list on the form and click the **Modify** button to display a form similar to the following:

No codes selected means allow ALL codes

Available

| | |
|---|-------------|
| 3 | Factory |
| 4 | Warehouse |
| 5 | Development |

Selected

| | |
|---|----------|
| 1 | Accounts |
| 2 | Admin |
| 6 | Support |

OK
Cancel

Here you must select which codes are accessible from this lookup for the selected view. Move the codes that are to be accessible to the **Selected** box, using the arrows. Click **OK** when you have selected all required options.

NOTE:

Tick the box at the top of the above form to ensure that, if no codes of a lookup are selected for a view, it is assumed that the setup has not yet been completed, and full access is given. This ensures that no view that has access to a lookup is denied access to all the options in it. If you do not want a lookup being modified at all by particular users, you should see **Maintain user profiles**, page 273, for details on either preventing access to this lookup, or giving read-only access to the lookup.

You should repeat this for all the lookups in the **Code access** box, and then the setup of the view is complete.

You can add as many different views as are necessary for your system, for example, you may need one view for each department, or perhaps just one view for each site.

Once you have set up the views, you will need to specify when the views are used. This is done on both the user level and the employee level.

You can add, delete or copy a view using the relevant buttons on the **Maintain views** form.

27.1.2 Add codes to a view

If you have a new limited-by-view lookup in your system, or the options in a limited lookup have changed, there is a quick way of ensuring that all the views have the required level of access.

On the **System** menu select **Maintain codes**. Select the required limited lookup and click the **Modify** button to display a form similar to the following:

| Code | Description | Cross-ref | Flexipay code |
|------|-------------|-----------|---------------|
| 1 | Accounts | | 1 |
| 2 | Admin | | 2 |
| 3 | Factory | | 3 |
| 4 | Warehouse | | 4 |
| 5 | Projects | | 0 |
| 6 | Support | | 6 |
| 7 | Hardware | | 0 |
| 8 | Development | | 0 |
| 9 | Sales | | 5 |

Click the **Views** button on the above form to open a form similar to the following:

| Code | ACCOUNTS | ADMIN | FULL | PRODUCTION |
|------|-------------------------------------|--------------------------|-------------------------------------|--------------------------|
| 1 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 4 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| 5 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6 | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

All possible codes for the lookup are listed in the left-hand column. All views set up on your system are listed at the top. You can tick or untick any of the boxes to define which codes are accessible for which views (in the above example, the ACCOUNTS view has access to all codes for this lookup, while the other views are denied access to certain of the codes). Click **OK** to save the setup for this code.

27.2 Assigning views

There are two distinct applications of views - user views and employee views. Remember that neither user views nor employee views operate while logged in as MASTER.

For views to function comprehensively, you should set up user views and employee views.

User views affect the individual user of the system - each user is assigned to a view which affects the options that can be selected in non-employee-related lookups. User views affect lookups on the **System** menu, and others that do not directly relate to employees, e.g., editing the details of a roster, entitlement codes, the **Group drop-down list** shown on the main form.

Employee views affect all lookups that contain employee-related information. Each employee will have one employee view - this limits the available options on lookups when a user is modifying this employee's record.

Employee views affect any lookups directly modifying employee details, e.g., department, job title, the shift pattern to which an employee is assigned.

27.2.1 User views

There are two ways of assigning views to a user.

By view

The first option is to assign users within the **Maintain views** section. Select the required view and click the **Modify** button, to display the **Modify view** form:

Modify view HULL

Description:

| Code access | Bank address |
|-------------|--------------|
| BANK | Bank address |
| COMPANY | Company |
| DEPARTMENT | Department |
| JOBTITLE | Job title |
| LINEMGR2 | |
| WORKCODE | Work code |
| WORKSHIFT | Shifts |

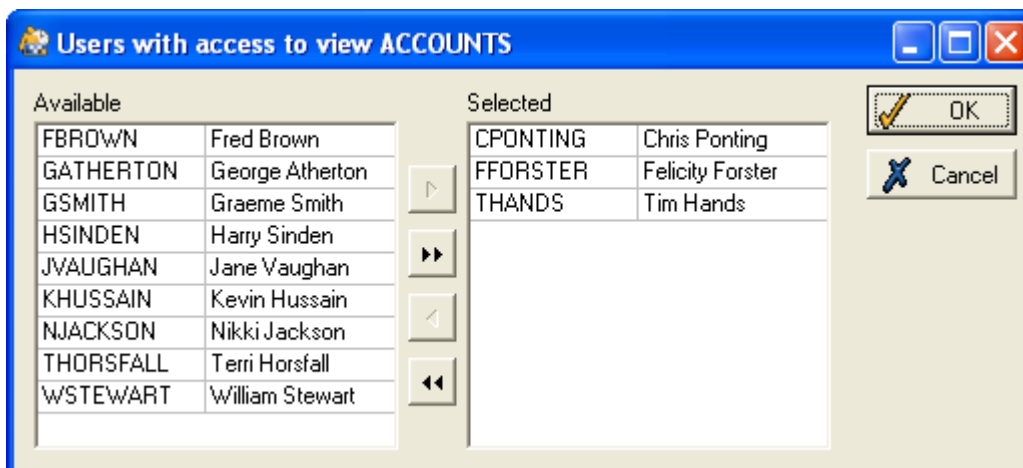
Modify

OK

Cancel

Users

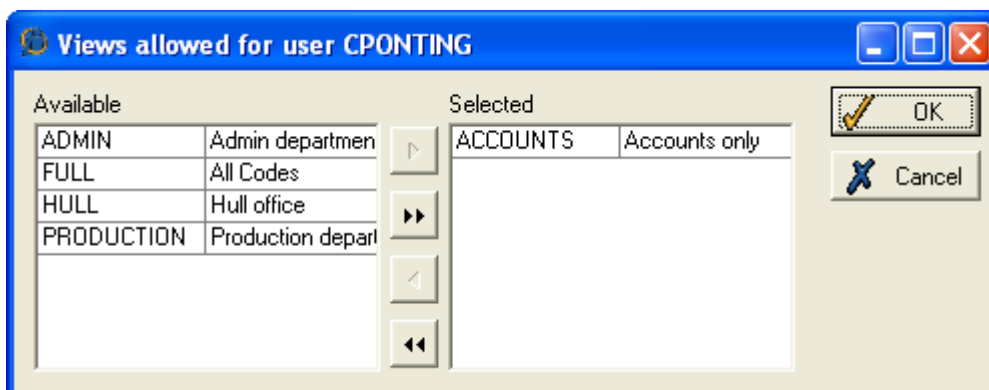
Click the **Users** button to the right of the form, to open this form:



Here you should use the arrows to move all users who are to have access to this view into the **Selected** box on the right. Note that users can be assigned to more than one view.

By user

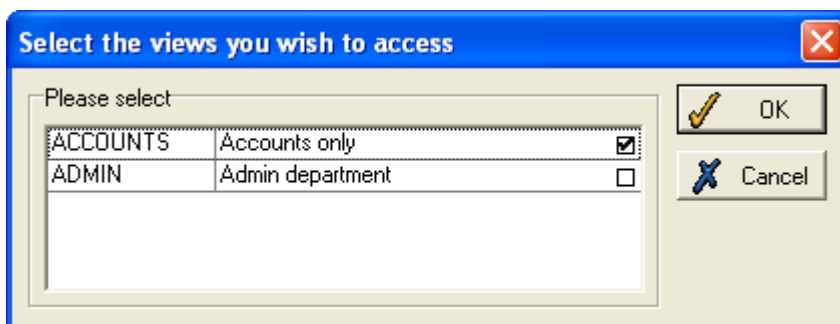
The alternative method of assigning views is to select **Maintain users** from the **System** menu, and select the views user-by-user. Click the **Users** icon, select the required user from the list and click **Modify**. This takes you to the **Edit user** form (see page 282, for more details on this form). On this form, you should click the **View access** button, to open this screen:



Here, move all the views you wish to allow for this user into the **Selected** box.

27.2.2 Users assigned to more than one view

When a user who is assigned to more than one view logs in to any Mitrefinch application, there will be a **View** button on the Login screen. Clicking this button opens the table below:



The user should tick the boxes of all the views he or she wishes to use at present. If one view is chosen, then only the codes in that view can be seen in any non-employee-related display of that

lookup. If more than one view is chosen then all codes accessible to any of the selected views are shown.

In the above example, although the user has access to both the ACCOUNTS and ADMIN views.

Once logged in, the user can change which views he or she is currently using by opening **Local preferences** from the **Other** menu. There will be a **Views** tab which, when clicked, opens the box above on which the views selected can be changed.

27.2.3 Employee views

These are the views used when editing any employee-related details. The employee view of the employee whose details are being edited is always the factor which limits the drop-down lists. Only if employee views are not used at all will the user view have an effect on an employee-related drop-down list.

Here is a common example of when they are used in TMS (in other Mitrefinch applications, the process is exactly the same):

The company manager is changing the shifts which a number of employees work. The employees are from various different sites, each of which have a different view. The manager needs to make sure that the shifts he enters for the employees are valid for the site at which they work (e.g., some sites may allow night shifts, others not). This will be guaranteed if the employees are all assigned to employee views.

This is because, when selecting the shift for an employee who works in the factory site and whose employee view is Factory, only the shifts relevant to employees at the factory site will be on the drop-down list. Once he has entered the shift for this employee, he moves on to another employee who works in the call centre site and whose employee view is Call centre. A different set of shifts, relevant to this site, will be shown on the drop-down list, so he can only select from these shifts for this employee. This continues for employees in all the different sites.

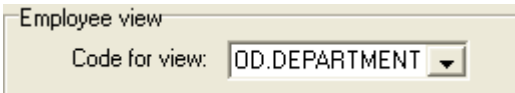
Assign employee views

Assigning employees to employee views is a simple task. In most cases, you will want to assign employees to a view depending on which company, department, location etc. they are in.

Note:

- Unlike system users, who can be assigned to multiple user views, each employee can only be assigned to one employee view.

To assign an employee to a view, you first have to decide how employee views will be separated (e.g., by company, by department). Open **Maintain system preferences** from the **System** menu, and, on the **General** tab, there will be an **Employee view** section:



Select from the drop-down list the **Code for employee view** - this is how employees will be separated for views. In the above example, the field OD.DEPARTMENT has been chosen, meaning that all employees in a particular department will have the same employee view.

Then open **Maintain codes** from the **System** menu. From the **Maintain codes** list, select the lookup that you entered as the **Code for employee view** (in this case **Department**). Click **Modify** to display this table, which now has an additional column, entitled **Employee view**:

| Code | Description | Cross-ref | Flexipay code | Employee view |
|------|-------------|-----------|---------------|---------------|
| 1 | Accounts | | 1 | ACCOUNTS |
| 2 | Admin | | 2 | ADMIN |
| 3 | Factory | | 3 | FULL |
| 4 | Warehouse | | 4 | PRODUCTION |
| 5 | Development | | 5 | FULL |
| 6 | Support | | 6 | FULL |
| 7 | Leavers | | 7 | |

This list contains all departments on the system - in the **Employee view** column, you can assign each department to an employee view. If the column is left blank for any of the codes, this means that employees in this department will not be assigned to any employee view, meaning there will be no restriction on the options that can be selected for these employees (in the above example, the **Leavers** department is not at all limited by views).

Note in the above example how a number of departments each have the same view - this means that employees in each of these departments will have the same options available on the drop-down lists.

Now when any system user (regardless of user views) is editing any record relating to an employee, the options available in drop-down lists will be limited depending on which department the employee is in, and the view that has been assigned to that department.

28 Job costing

28.1 What is Job Costing?

Job Costing is an extremely valuable optional add-on module to Mitrefinch TMS. It has been created to enable you to track employee and organisational productivity in real time, with detailed, relevant and accurate management information available at a glance.

There are two main areas in the module:

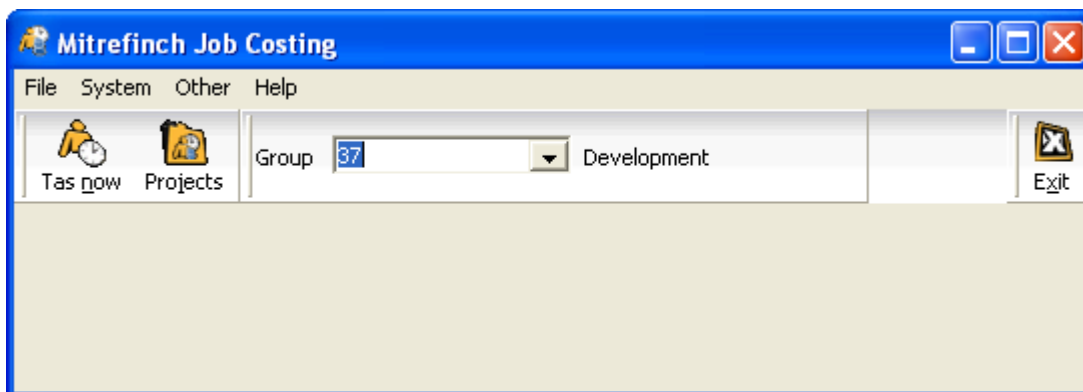
- the **Real time view**, which takes current information from employees' TAS clockings to show what employees are working on at the present moment;
- the **Projects** section. By adding a project to the system, you can plan estimates of the time and expense of various tasks within the project. The system then calculates actual information from processed TAS clockings, allowing you to see the exact time and cost of each task.

Both of these sections rely on setting up TAS (Time Allocation System) categories. These are specific to your system, as they are used by employees to record the time spent on a particular project. Employees make a TAS clocking when they start work on a task, and then a further clocking when they finish on that task and move on to a different one.

To access the **Job Costing** module double-click this icon in the WinTMS folder:



Log on with the same user name and password as you use to enter TMS, and this form will be displayed:



This is the main **Job Costing** form, from which all functions can be accessed.

28.2 Real time view

The real time view allows you to see what each individual employee is doing, as well as the overall amount of time being spent on different jobs by a range of employees, or the company as a whole.

Click the **TAS Now** icon on the main form to display the real time view.

First, you will see the **Select range** screen, which you should use to make the selection of employees. To do this, see **Select range**, page 28.

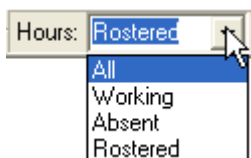
Once you have selected the range, a screen like this will be produced:

| Employee name | Status | Department | Description |
|-----------------------------|--------------|------------|-------------|
| 310002: G D Dale Ab | Absent | 31 | Support |
| 310003: L Dixon | Not rostered | | |
| 310005: P Steel | Absent | 31 | Support |
| 310063: A Lee | Absent | 31 | Support |
| 310064: I Farquharson-Pratt | Planned Abs | 31 | Support |
| 310065: N Hosseinian | Working | 34 | Engineering |
| 310052: T Carter | Working | 34 | Engineering |

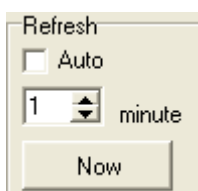
| Code | Count | BH | H | P | Total |
|-----------------|-------|-------|------|------|-------|
| 31: Support | 4 | 0:00 | 3:48 | 7:21 | 15:27 |
| 34: Engineering | 9 | 34:12 | 0:00 | 0:00 | 38:42 |

The two halves of the screen are designed to give you an immediate overview of what is going on in the company for the selected range of people and the selected activities. The first table shows what each employee is doing, while the lower table shows overall hours figures that the selected range spends on each TAS code.

The **Hours** drop-down list in the top right hand corner allows you to filter which employees (within the original selection) are displayed in the table (**All** staff, only those who are **Rostered** to work now, only those who are **Working** now, or only those who are **Absent**):



In the bottom right-hand corner, the **Refresh** section allows you to set an automatic refresh time in minutes, which is activated by ticking the **Auto** box. You can also opt to refresh data manually at any time by clicking the **Now** button.



Using either of these options, the data will be updated, taking into account any new clockings that have been made or any new rosters that have come into effect since the last time the table was refreshed. This may affect the figures in the **Hours breakdown** table which will change to show the most recent figures of time worked and absent.

28.2.1 Current TAS categories for employees

| Current Tas categories for employees | | | | Hours: All |
|--------------------------------------|--------------|------------|-------------|------------|
| Employee name | Status | Department | Description | |
| 310002: G D Dale Ab | Absent | 31 | Support | |
| 310003: L Dixon | Not rostered | | | |
| 310005: P Steel | Absent | 31 | Support | |
| 310063: A Lee | Absent | 31 | Support | |
| 310064: I Farquharson-Pratt | Planned Abs | 31 | Support | |
| 310065: N Hosseinian | Working | 34 | Engineering | |
| 310052: T Carter | Working | 34 | Engineering | |

The top section of the screen lists the employees, showing the working **Status** (absent, working, etc.), and the TAS code, which tells you whether they are currently assigned to specific projects.

The TAS category is a means of labelling employees' worked hours, as well as a way of allocating worked hours to a particular cost centre, department or task. In this example the TAS category selected is Department.

This table allows you to change the TAS code (in this case Department) to which the employee is assigned. Simply click within the **Department** column, and enter the number of a different department. The **Description** column will then change accordingly.

28.2.2 Hours breakdown

| Hours breakdown | | | | | | Category: TAS2 | Department |
|-----------------|-------|-------|------|------|-------|----------------|------------|
| Code | Count | BH | H | P | Total | | |
| 31: Support | 4 | 0:00 | 3:48 | 7:21 | 15:27 | | |
| 34: Engineering | 9 | 34:12 | 0:00 | 0:00 | 38:42 | | |

The bottom part of the screen shows the hours breakdown on the current day for the TAS category you have selected. In this example, the selected category is TAS2 - Department. This can be changed using the **Category** drop-down list:

| Category: TAS0 | Department |
|----------------|------------|
| TAS0 | Department |
| TAS1 | test |
| TESTN1 | Hours |
| MULTI | Manager? |
| TAS2 | Location |

The **Code** column on the left displays the different codes of the selected TAS category (in this example, the different department codes of the **Department** category). Note that only codes containing information are listed - in the above example, only these two departments currently have employees allocated to them.

The next column has an employee **Count** - this shows the number of employees currently assigned to each TAS code. In the above example, four employees are allocated to Support, and nine to Engineering.

The rest of the columns contain the different types of hours, (e.g., basic hours, overtime, unauthorised absence hours) and a **Total** of all the rostered hours for each TAS code. In this example, the nine employees currently assigned to Engineering have worked 34:12 hours at BH (Basic hours) between them.

28.3 Projects

Projects use TAS clockings to calculate the total amount of time and money spent on a job. Depending on the TAS categories on your system, they can also calculate a quantity (e.g., of items made, calls received).

28.3.1 Project wizard

To add a new project to the system, select **Maintain Projects** from the **System** menu, and a form like this will be shown:

| Code | Description |
|-------|------------------------|
| PROJ1 | Telesales setup |
| PROJ2 | December Tate delivery |

Close

Add

Modify

Delete

Copy

Project analysis

Non completed

Completed

All

Colour progress

By hours

By cost

By quantity

None

Click the **Add** button to enter a new project. This opens the **Project Wizard**, which displays like this:

The screenshot shows a software window titled "Maintain project definitions" with a standard Windows-style title bar (minimize, maximize, close buttons). Inside the window is a "Job costing project wizard" form. The form is divided into several sections:

- Project name:** A text box with the instruction "Enter a code to uniquely identify this project" and a dropdown arrow. To its right is a "Completed" checkbox.
- Description:** A text box with the instruction "Enter a short description for this project to make it easier to find in the future".
- Dates:** A section with the instruction "Enter the start and end dates for the project". It contains two date pickers: "Start date:" and "End date:", each with a text box and a "... " calendar button.
- Track by:** A section with three checkboxes: "Hours", "Cost", and "Quantity".

At the bottom of the form are three buttons: "<< Back", "Next >>", and "Cancel" (with a red 'X' icon).

You will need to enter a code to identify the new project. The code must be unique (i.e., not assigned to any other project).

You can also type a short project description in the **Description** field, so the project will be easy to find.

You should enter a date range for the project, using the calendar buttons. Only data recorded within this range will be associated with the project.

A project can make calculations on the amount of **Hours** spent on the project, the **Cost** of the project, or (depending on the TAS categories set up) a **Quantity**. Tick as many boxes as are relevant to the project.

Click **Next**, to move on to this form:

28.3.2 Select the categories to include

Maintain project definitions

Select the categories to include

DEP Department Fixed value: <none>

CONTRACT Contract Fixed value: <none>

MULTI Manager Fixed value: <none>

LOCATION Location Fixed value: <none>

Tas category for quantity: Absence

<< Back Next >> Cancel Help

The project takes information from TAS clockings. If you have more than one TAS category set up, select which ones are to be used to provide information for the project.

If you select a **Fixed value** from the category, this is the only TAS value that will show an employee as having worked on the project. If you wish to use more than one TAS value, leave this box blank.

If, on the previous screen, you chose to track by **Quantity**, you must also select a **TAS category for quantity** (on this example, 'Absence' is a quantity TAS category). This information will not be shown on the form if you did not previously tick **Quantity**.

Click **Next** to display this screen:

28.3.3 Define valid tasks

The screenshot shows a software dialog box titled "Maintain project definitions" with a sub-header "Define valid tasks for this analysis". The dialog contains a table with the following columns: Task, Start date, End date, Estimated hours, and TAS0. The table is currently empty. Below the table, there are three buttons: "<< Back", "Finish", and "Cancel".

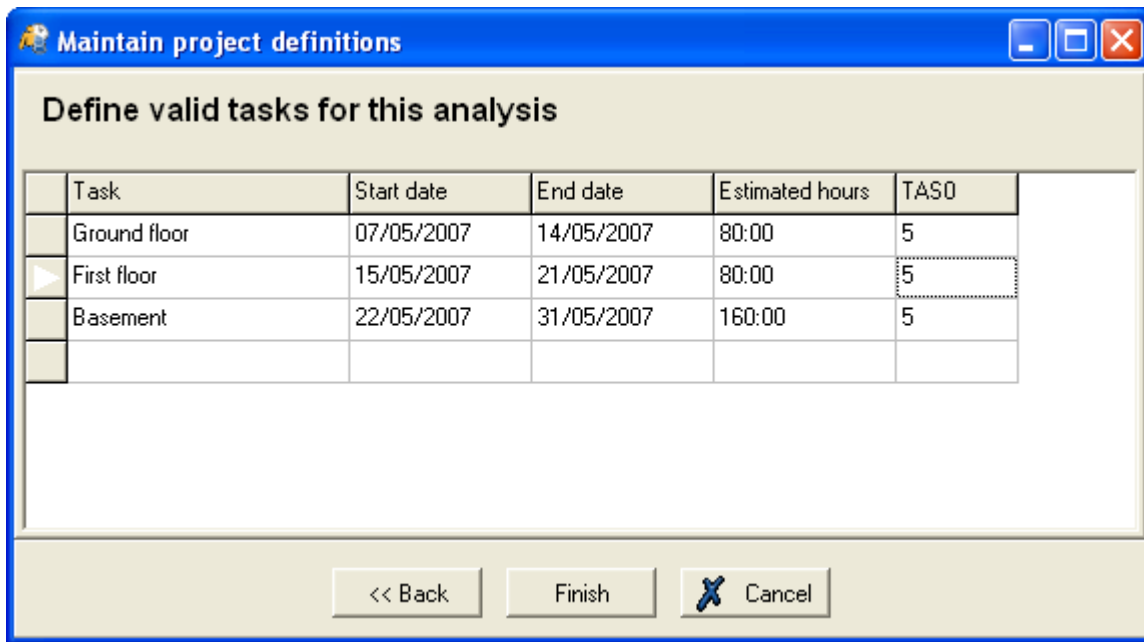
| Task | Start date | End date | Estimated hours | TAS0 |
|------|------------|----------|-----------------|------|
| | | | | |

Here you should enter the specific tasks involved in the project, and assign them to a TAS value, so that, when an employee clocks this value, the time will be calculated as having been spent on this task.

For each task, enter a name and a start and end date. The date range for each task must be within the date range of the project, if these were entered previously. If you do not enter dates here, the project start and end dates will be used. Only clockings within the date range will be associated with the task, enabling you to use the same TAS value to reference different tasks depending on the date of the clocking.

There will be a column for each TAS category you chose to include in the project (in the above example, 'TAS0'). If you entered a **Fixed value** for the category on the previous screen, that value will be given automatically to every task you create, and cannot be changed. If you did not enter a fixed value, you will be able to select a different value for each task you create.

You can also enter an estimated value of hours, cost and quantity (depending on which were selected previously), so the system can calculate whether or not tasks are completed on budget.

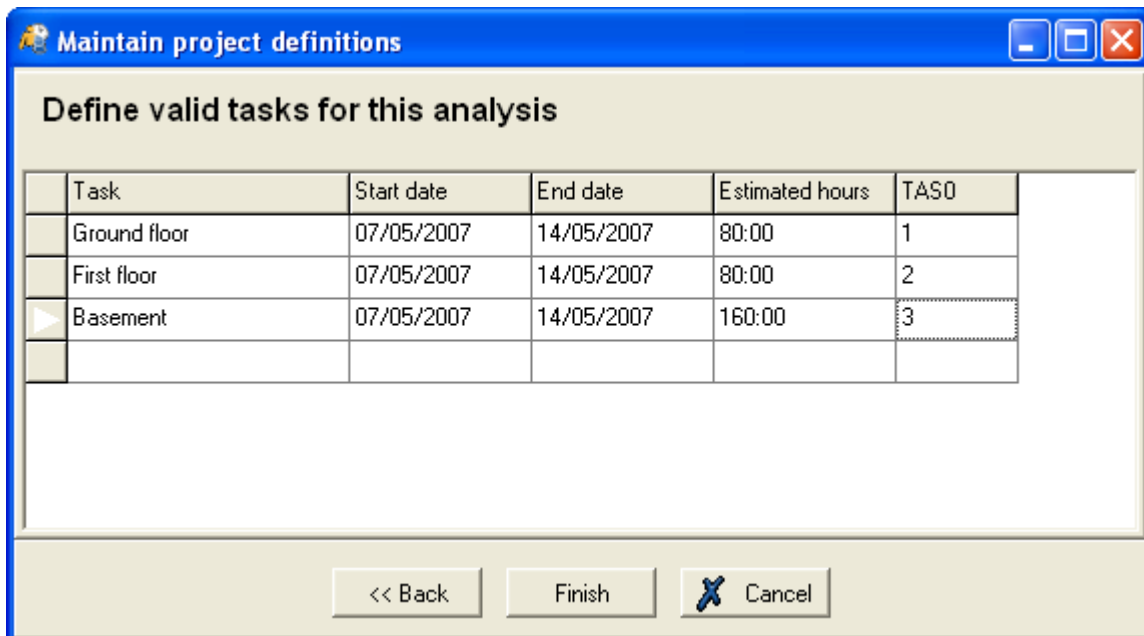
Project with a fixed TAS value:


The screenshot shows a window titled "Maintain project definitions" with a sub-header "Define valid tasks for this analysis". It contains a table with the following data:

| Task | Start date | End date | Estimated hours | TAS0 |
|--------------|------------|------------|-----------------|------|
| Ground floor | 07/05/2007 | 14/05/2007 | 80:00 | 5 |
| First floor | 15/05/2007 | 21/05/2007 | 80:00 | 5 |
| Basement | 22/05/2007 | 31/05/2007 | 160:00 | 5 |
| | | | | |

At the bottom of the window are three buttons: "<< Back", "Finish", and "Cancel".

In this example project, a fixed TAS value of '5' has been set. The system differentiates between tasks by each one having a different date range, so that a TAS clocking of '5' made on 08/05/2007 would assign an employee to the 'Ground floor' task, whereas the same clocking made on 16/05/2007 would be assigned to 'First floor'.

Project with no fixed TAS value:


The screenshot shows a window titled "Maintain project definitions" with a sub-header "Define valid tasks for this analysis". It contains a table with the following data:

| Task | Start date | End date | Estimated hours | TAS0 |
|--------------|------------|------------|-----------------|------|
| Ground floor | 07/05/2007 | 14/05/2007 | 80:00 | 1 |
| First floor | 07/05/2007 | 14/05/2007 | 80:00 | 2 |
| Basement | 07/05/2007 | 14/05/2007 | 160:00 | 3 |
| | | | | |

At the bottom of the window are three buttons: "<< Back", "Finish", and "Cancel".

Here, each task has a different TAS value, but the same date range. This means that the employee must clock the correct value to be assigned to the appropriate task. It has the advantage of allowing more than one task to be recorded at the same time, or in a different order to that scheduled.

Click **Finish** to add your project to the project list and close the Project Wizard. The new project will be added to the **Maintain projects** table.

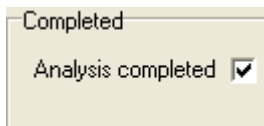
28.3.4 Modify projects

If you wish to change or update the project, do so from the **Maintain projects** table, by clicking **Modify**.

It is possible to amend any of the project details, except for the project code and the selected TAS categories.

After clicking **Modify**, you can indicate if the project, or any of the individual tasks have been completed. This makes it easier to see at a glance what needs to be done.

To indicate that the entire project has been completed, tick the **Analysis completed** box which is displayed on the Project Wizard page:



Completed

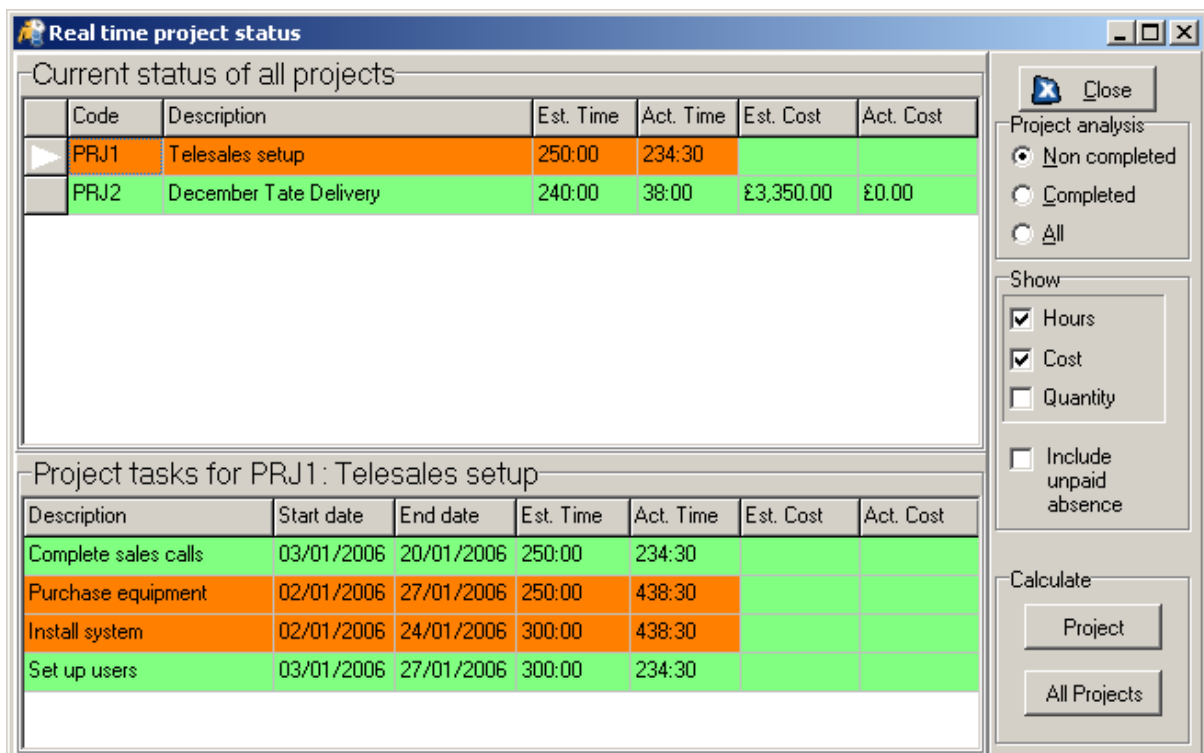
Analysis completed

Should you need to indicate that a particular task has been completed, but not the entire project, go to the **Define valid tasks** page, and tick the box in the **Completed** column.

28.3.5 Project tracking

It is important to keep track of your projects, in order to see the time and money being spent on the project, and all tasks within it. The actual values can be compared with any estimated figures you gave when setting up the project.

To access the **Project status** screen, click the **Projects** icon on the main form:



Real time project status

Current status of all projects

| | Code | Description | Est. Time | Act. Time | Est. Cost | Act. Cost |
|--|------|------------------------|-----------|-----------|-----------|-----------|
| | PRJ1 | Telesales setup | 250:00 | 234:30 | | |
| | PRJ2 | December Tate Delivery | 240:00 | 38:00 | £3,350.00 | £0.00 |

Project tasks for PRJ1: Telesales setup

| Description | Start date | End date | Est. Time | Act. Time | Est. Cost | Act. Cost |
|----------------------|------------|------------|-----------|-----------|-----------|-----------|
| Complete sales calls | 03/01/2006 | 20/01/2006 | 250:00 | 234:30 | | |
| Purchase equipment | 02/01/2006 | 27/01/2006 | 250:00 | 438:30 | | |
| Install system | 02/01/2006 | 24/01/2006 | 300:00 | 438:30 | | |
| Set up users | 03/01/2006 | 27/01/2006 | 300:00 | 234:30 | | |

Close

Project analysis

Non completed

Completed

All

Show

Hours

Cost

Quantity

Include unpaid absence

Calculate

Project

All Projects

The top grid lists all projects in your system, allowing you to see the time taken and the expense of the project. If you have set up a quantity-type TAS category, information based on this can also be shown.

The bottom grid shows the same information, broken down into each individual task within the currently selected project (the one with the white arrow to the left).

The **Estimated** figures are those that were given when the project was set up.

To find out the **Actual** values for time, cost and quantity, use the **Calculate** section in the bottom right-hand corner. Click the **Project** button to calculate just the currently selected project, or the **All Projects** button to calculate the values for every project. The actual values are taken from processed TAS clockings.

The colour the project is highlighted in indicates whether the project is under budget or over budget. In the above example, green means under budget and orange means over budget.

On the above example, the 'Telesales setup' project is shown as over budget, as although the figure for the overall project is less than the estimate, the 'Purchase equipment' and 'Install system' tasks have taken longer than the estimate.

What you see in the two tables can be filtered using the boxes on the right. In the **Project analysis** section, choose whether to see only completed or non-completed projects, or to see all. In the **Show** section, tick the boxes if you wish to display the estimated and actual figures for **Hours, Cost** and **Quantity**.

Should you need to modify any details of a project, open the **Maintain projects** screen, and click the **Modify** button. You can amend details in the same way as when the project was first created (see **Add a project**, page 305).

29 Escalation

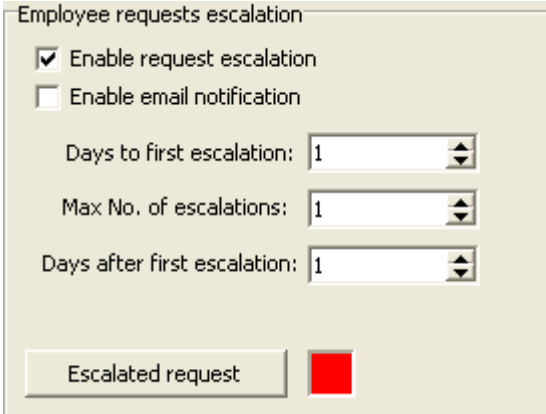
29.1 Introduction

In the event of a supervisor being unable to check work record requests and anomalies for an employee, it is possible to 'escalate' these outstanding requests to another available manager or supervisor. For example, if a supervisor is off sick, the unchecked requests and anomalies for their department will be escalated to their own supervisor and so on. This means that unchecked requests and anomalies are dealt with and don't build up unnecessarily over time.

29.2 Set up escalations

29.2.1 System preferences

Escalations are activated via the system preferences. Select the **System** menu from the main **TMS** form and then select **System preferences**. Click the **Escalation** tab to display the following options:



Employee requests escalation

Enable request escalation

Enable email notification

Days to first escalation: 1

Max No. of escalations: 1

Days after first escalation: 1

Escalated request

Enable request escalation: tick this box to activate the escalation of employee work record requests.

Enable email notification: if you tick this box, emails will be sent automatically to the relevant supervisors when work record anomalies are escalated to them.

Days to first escalation: this is the amount of days that will pass before an unchecked employee request is first escalated, to the supervisor of the employee's supervisor.

Max no. of escalations: this is the maximum amount of tiers of management to which the request will be escalated if it is not dealt with. By default the request will always be escalated to the supervisor of the employee. If this figure is set to '1' the request will be escalated to the supervisor and then to the supervisor's supervisor. If it is set to '2' then the request will be escalated to the supervisor, then to the supervisor's supervisor and then to the supervisor's supervisor's supervisor and so on.

Days after first escalation: this is the amount of days after the first escalation before the request is escalated to the next tier of management. For example, if this is set to '2', then two days will pass after a request is first escalated to the employee's supervisor, before the request is escalated to the supervisor's supervisor, if it has still not been dealt with.

Escalated request: you can define the colour of escalated employee requests as they appear on the **Authorisation list**, to be dealt with by a supervisor. Either click the box or the coloured box to display the following form:



Click the desired coloured box and then click **OK**. You can also **Define Custom Colours** by clicking the corresponding button.

Enable work record anomaly escalation: tick this box to activate the escalation of work record anomalies.

Enable email notification: if you tick this box, emails will be sent automatically to the relevant supervisors when employee requests are escalated to them.

Days to first escalation: this is the amount of days that will pass before an unchecked work record anomaly is first escalated, to the supervisor of the employee's supervisor.

Max no. of escalations: this is the maximum amount of tiers of management to which the anomaly will be escalated if it is not dealt with. By default the anomaly will always be escalated to the supervisor of the employee. If this figure is set to '1' the anomaly will be escalated to the supervisor and then to the supervisor's supervisor. If it is set to '2' then the anomaly will be escalated to the supervisor, then to the supervisor's supervisor and then to the supervisor's supervisor's supervisor and so on.

Days after first escalation: this is the amount of days after the first escalation before the anomaly is escalated to the next tier of management. For example, if this is set to '2', then two days will pass after an anomaly is first escalated to the employee's supervisor, before the anomaly is escalated to the supervisor's supervisor, if it has still not been dealt with.

Maximum no. of days to check back: this is the maximum amount of days that the processor checks back when it checks for escalations.

Escalated anomaly: you can define the colour of escalated work record anomalies as they appear on the **Unchecked anomalies** form, to be dealt with by a supervisor. Either click the box or the coloured box to display the following form:



Click the desired coloured box and then click **OK**. You can also **Define Custom Colours** by clicking the corresponding button.

29.2.2 Define users

It is essential that all supervisors involved in the escalation process have their employee information set against their user(s) within **TMS**. This is so that the system knows which escalations have been escalated to that user. You can achieve this on the **Self access** panel of the **Employee access** form. For more details see **Employee access** on page 282.

29.2.3 Set path of escalation

You will need to define a supervisor for each employee, to determine to whom requests and anomalies are passed onto if they are not dealt with. This can be done via the **Supervisor reference** field. Consider the following example:

'Employee 1' is managed by her departmental manager, 'Supervisor 1'. Any employee requests or work record anomalies relating to 'Employee 1' are usually sent to 'Supervisor 1' for approval. Therefore, you would add 'Supervisor 1' into the **Supervisor reference** field for 'Employee 1'. However, in the case that 'Supervisor 1' is unavailable, another departmental manager, 'Supervisor 2' is responsible for any requests or anomalies from 'Employee 1'. So you would add 'Supervisor 2' into the **Supervisor reference** field for 'Supervisor 1' and so on.

29.3 The escalation process

29.3.1 Check for escalations

The check for escalation will be performed by the processor as a scheduled job, **Check for escalations**. You will have to add this job onto the **Automatic job scheduler**. For more details of how to do this see **Add a new job** on page 351.

The processor will check for any employee requests and/or anomalies that have not been dealt with and any escalations will be displayed in the relevant parts of the system.

It is possible for an email to be sent automatically to the relevant supervisors, alerting them to any requests or anomalies which have been allocated to them. For instructions on how to set this preference see **Set up escalations** on page 312.

29.3.2 Show escalations

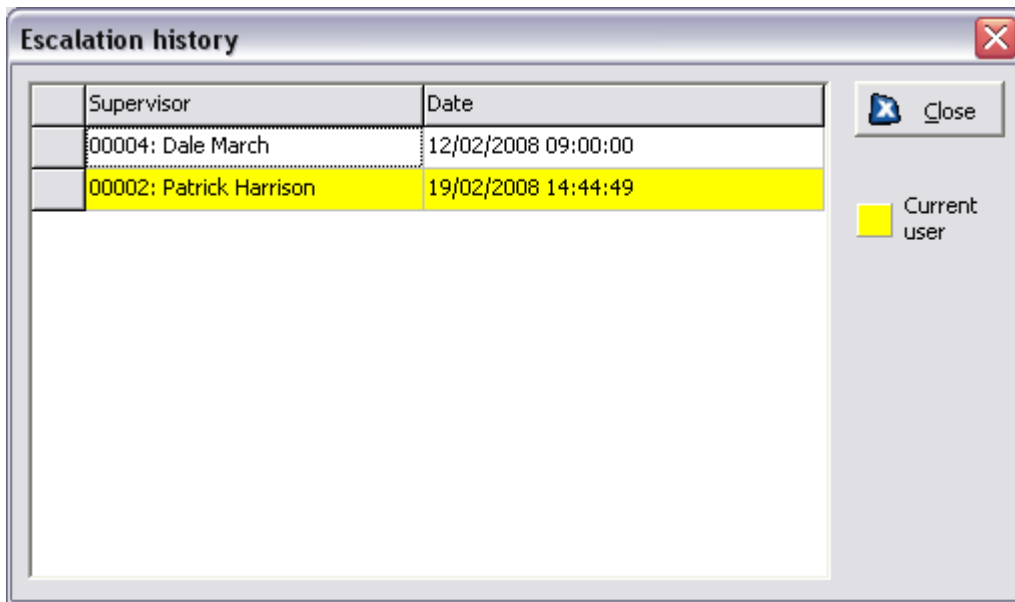
Any escalated employee requests will be displayed on the **Authorisation list**. They will be shown in the different colour specified in the system preferences:

| Employee | Type | Description | Status | Submitted | Edit |
|--------------------|-------------|---|---------|------------|------|
| 320069: H Peterson | Absence | Absence code H - Holiday on Tuesday 31/07/2007 (First half) | Pending | 20/07/2007 | |
| 320069: H Peterson | Work record | Work record on Fri 10-Aug, Reason: No fob as with car keys did not have car | Pending | 13/08/2007 | |
| 320069: H Peterson | Absence | Absence code H - Holiday on Thursday 16/08/2007 (Second half) | Pending | 14/08/2007 | |
| 380010: A Carter | Absence | Absence code DEN - Dentist on Tuesday 25/09/2007 (Second half) | Pending | 07/09/2007 | |
| 380073: S Knight | Absence | Absence code C - Company Business on Thursday 09/08/2007 (Second half) | Pending | 09/08/2007 | |
| 380073: S Knight | Absence | Absence code C - Company Business on Tuesday 02/10/2007 (Second half) | Pending | 07/09/2007 | |
| 377004: S Harrison | Absence | Absence code H - Holiday on Friday 12/10/2007 (Full day) | Pending | 13/09/2007 | |

Meanwhile, any escalated work record anomalies will be displayed on the **Outstanding anomalies** form. They will be shown in the different colour specified in the system preferences:

| Employee | Day | Shift | Clockings | BH | OP | OU | FLX | PADJ | OT1 | Abs Code | Hours | Reason | Chkd | Edit |
|-------------------|------------|--------|-----------|------|------|------|------|------|------|----------|-------|--------|--------------------------|------|
| 370001: B Platt | Fri 01-Feb | DEVNFD | | 0:00 | 0:00 | 0:00 | 0:00 | 0:00 | 0:00 | P | 7:30 | | <input type="checkbox"/> | |
| 370001: B Platt | Mon 04-Feb | DEVNFD | | 0:00 | 0:00 | 0:00 | 0:00 | 0:00 | 0:00 | P | 7:30 | | <input type="checkbox"/> | |
| 370001: B Platt | Tue 05-Feb | DEVNFD | | 0:00 | 0:00 | 0:00 | 0:00 | 0:00 | 0:00 | P | 7:30 | | <input type="checkbox"/> | |
| 370001: B Platt | Wed 06-Feb | DEVNFD | | 0:00 | 0:00 | 0:00 | 0:00 | 0:00 | 0:00 | P | 7:30 | | <input type="checkbox"/> | |
| 370001: B Platt | Thu 07-Feb | DEVNFD | | 0:00 | 0:00 | 0:00 | 0:00 | 0:00 | 0:00 | P | 7:30 | | <input type="checkbox"/> | |
| 370001: B Edwards | Fri 08-Feb | DEVNFD | | 7:30 | 0:00 | 0:00 | 0:00 | 0:00 | 0:00 | | 0:00 | | <input type="checkbox"/> | |
| 370001: T C March | Mon 11-Feb | DEVNFD | | 0:00 | 0:00 | 0:00 | 0:00 | 0:00 | 0:00 | P | 7:30 | | <input type="checkbox"/> | |
| 370001: T C March | Tue 12-Feb | DEVNFD | | 0:00 | 0:00 | 0:00 | 0:00 | 0:00 | 0:00 | P | 7:30 | | <input type="checkbox"/> | |
| 370001: T C March | Wed 13-Feb | DEVNFD | | 0:00 | 0:00 | 0:00 | 0:00 | 0:00 | 0:00 | P | 7:30 | | <input type="checkbox"/> | |
| 370001: T C March | Thu 14-Feb | DEVNFD | | 0:00 | 0:00 | 0:00 | 0:00 | 0:00 | 0:00 | P | 7:30 | | <input type="checkbox"/> | |
| 370001: T C March | Fri 15-Feb | DEVNFD | | 0:00 | 0:00 | 0:00 | 0:00 | 0:00 | 0:00 | P | 7:30 | | <input type="checkbox"/> | |

Right-click on the escalated requests or anomalies on these forms and then click **Show escalation history** from the sub-menu. A form similar to the following will be displayed:



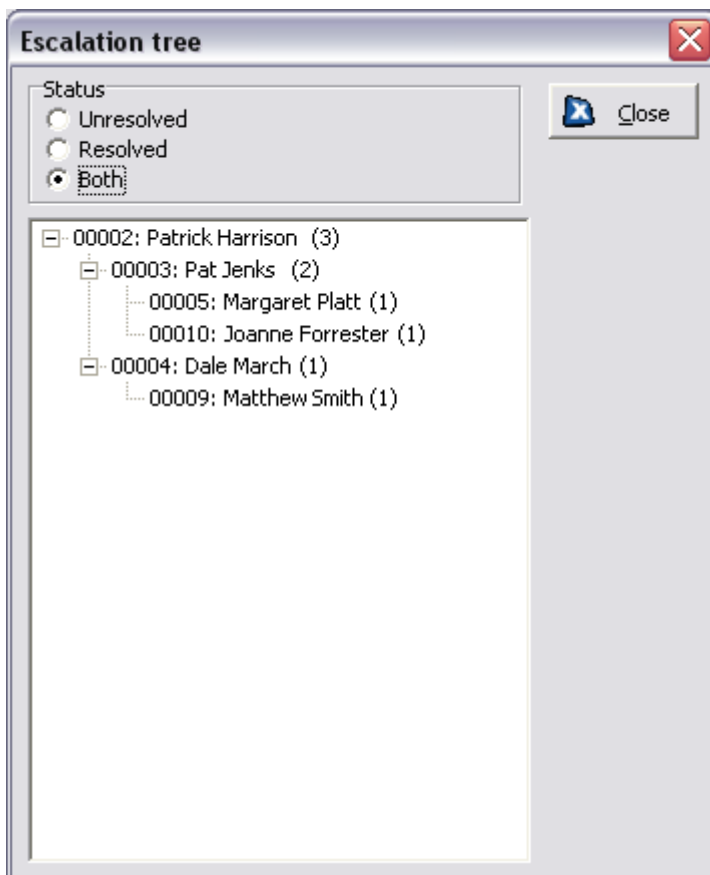
| Supervisor | Date |
|-------------------------|---------------------|
| 00004: Dale March | 12/02/2008 09:00:00 |
| 00002: Patrick Harrison | 19/02/2008 14:44:49 |

Close

Current user

This form records the history of the escalated request or anomaly. In this example, the request or anomaly was first assigned to 'Dale March' on 12/02/2008 and was then escalated to 'Patrick Harrison' on 19/02/2008. The current user will be highlighted on the list, as shown above.

You can also view your escalations by selecting the **Other** menu on the main **TMS** form and then selecting **View escalations**. A form similar to the following should then be displayed:



You can choose to view only **Resolved** or **Unresolved** escalations, or **Both** using the radio buttons at the top of the form. The current user will be at the head of the **Escalation tree** and all escalations

assigned to them will be displayed below. In the example above, 'Patrick Harrison' has three requests escalated to him, two from 'Pat Jenks' and one from 'Dale March'.

30 Visitor Badge Kiosk

30.1 What is Visitor Badge Kiosk?

Visitor Badge Kiosk is part of the Mitrefinch Time Management System package. It automates the visitor management process, reducing workload for reception and security staff, while allowing employees to book in and monitor their own visitors. Visitors can use the system to check their details are correct and obtain their badges automatically. Mitrefinch visitor management is made up of three programs which work in tandem with one another:

BkManager is used as part of a visitor management and access control system, and allows you to manage and monitor visitors and their interaction with the touchscreen.

BadgeKiosk touchscreen is the interface which visitors will use to receive their badges upon arrival.

ACS Visitor badges allows the user to maintain and issue visitor badges. For details of how to use this program see **Maintain visitor badges** on page 90.

N.B. It is also possible to book visitors in using **T&A.NET**, **HR.NET**. See **Maintain visitor bookings** on page 319.

30.2 BKManager

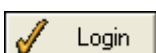
30.2.1 Logging onto BKManager

When the **BKMANAGER** icon is selected, the following login screen will be displayed:



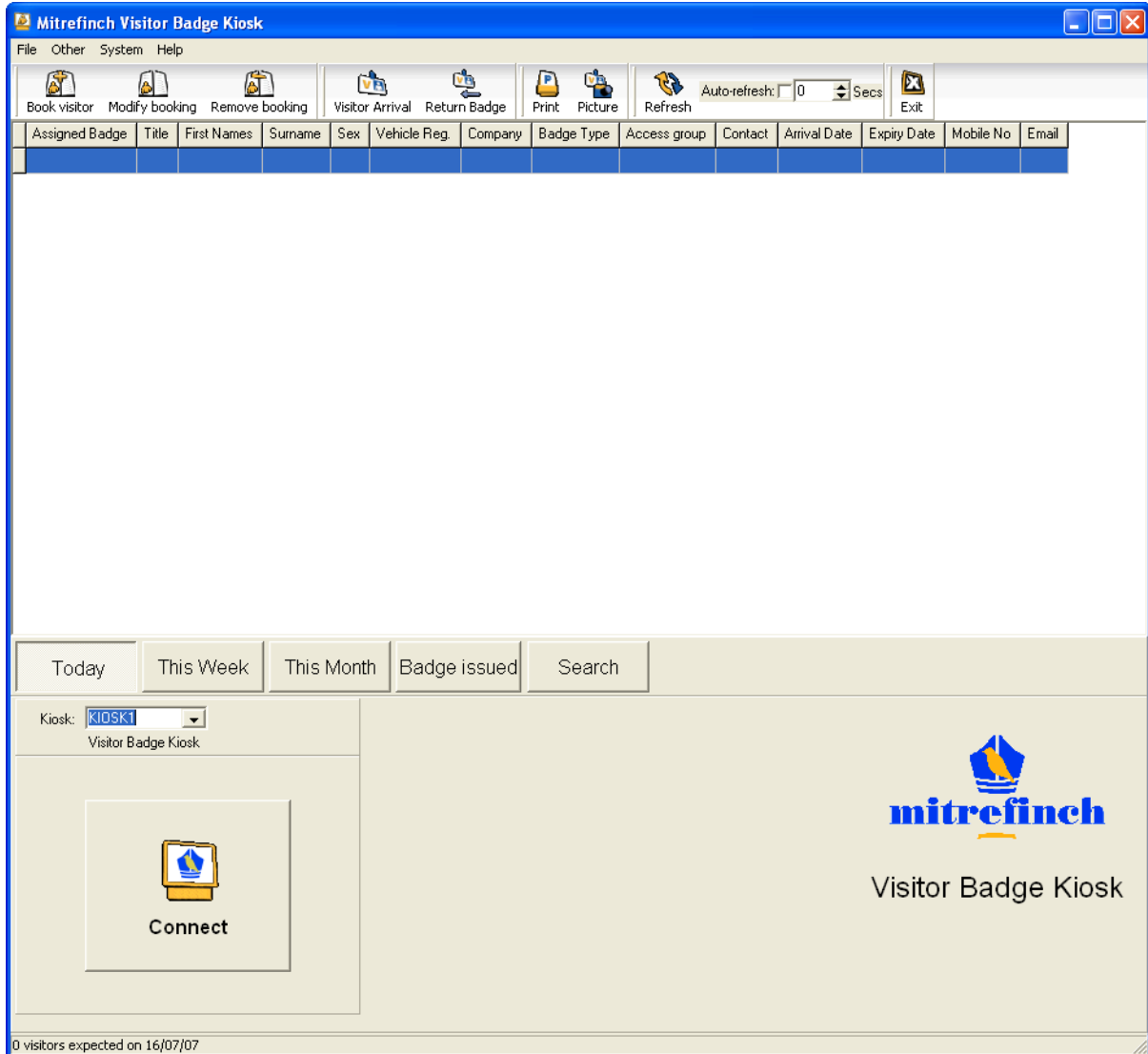
Enter your user name and password. The default username is 'MASTER' and the default password is 'PASS'.

Then click the **Login** button:



The main form appears, from which you can access all areas of the system.

30.2.2 Main form



From this screen you can access all the main functions of the program.

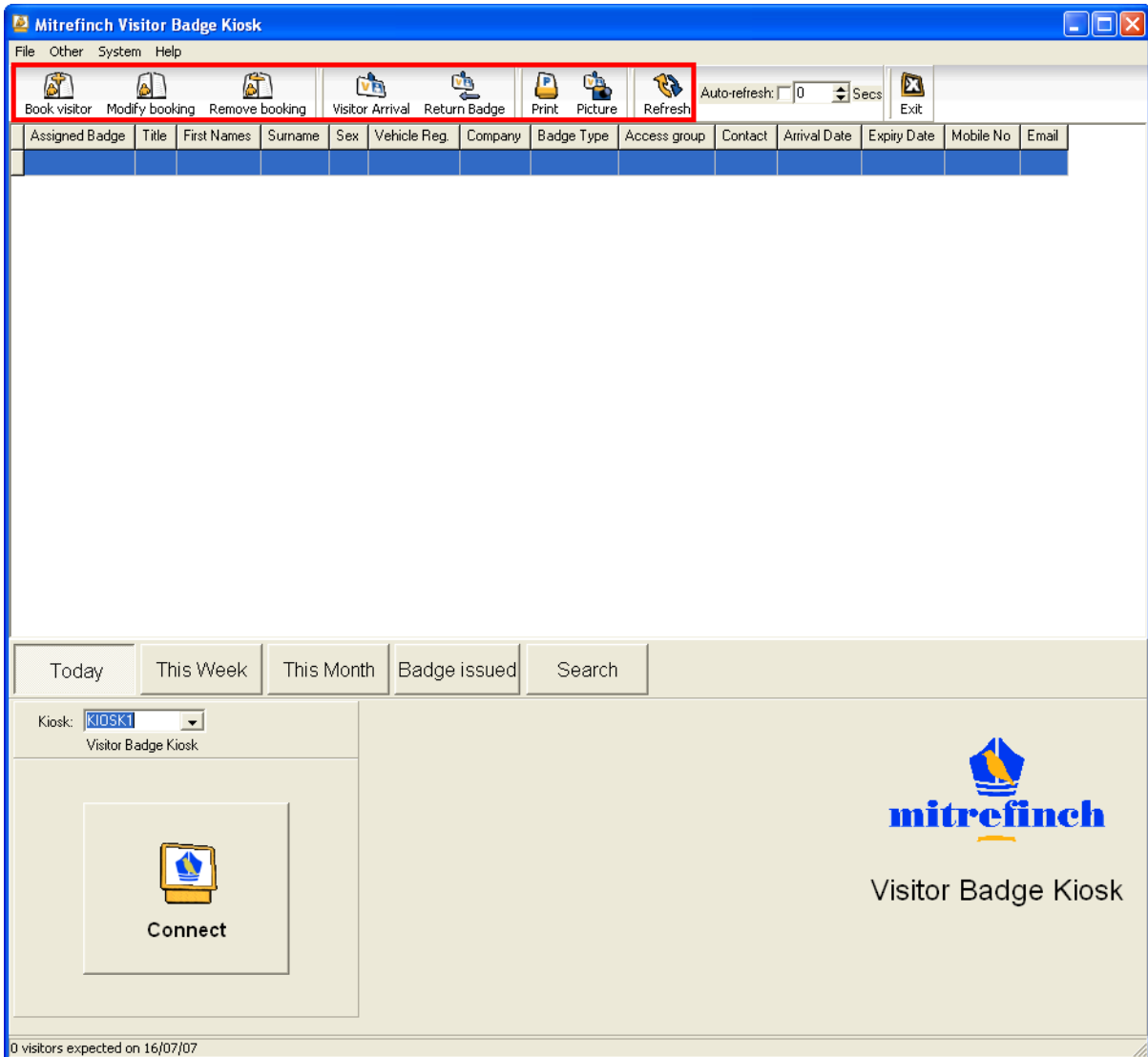
The buttons along the top of the form allow you to maintain visitor bookings. See **Maintain visitor bookings** on page 319.

The buttons on the bottom half of the form allow for remote monitoring and tracking of visitors. See **Visitor arrival filter** on page 327.

Any functions which are not represented by icons on the main form can be accessed from one of the menus at the top of the screen.

30.2.3 Maintain visitor bookings

The options toolbar allows the user to access the most frequently used parts of **Visitor Badge Kiosk**, and is located on the top of the screen as highlighted below:



Book visitor

Click the **Book visitor** button on the **BKManager** main form above and a form similar to the following should be displayed (some fields may vary depending on user preferences):

Enter the visitor's personal details in the relevant fields above. You are required to add the following information: Surname, Company, Contact, Badge type, Arrival date, Expiry date.

The **Badge type** field indicates which level of badge the visitor will be issued at the touchscreen. The badge type defines the access level and appearance of the badge. For details of how to set up and modify badge types see **Visitor badge types** on page 93.

If you wish to override the default access group of the selected badge, select a new access group from the drop-down list above.

The **Arrival Date** field indicates when the visitor is expected, for access control purposes. The **Expiry Date** field indicates when that visitor's badge will expire. All of these fields may be modified later using the **Modify** option, as explained below.

Once a new visitor's details have been entered into the system, click **OK**. A visitor record will then appear on the **BKManager** main form, as below:

| Assigned Badge | Title | First Names | Surname | Sex | Vehicle Reg. | Company | Badge Type | Access group | Contact | Arrival Date | Expiry Date | Mobile No | Email |
|----------------|-------|-------------|---------|-----|--------------|---------|------------|--------------|---------------|--------------|-------------|-----------|-------|
| | Mr | Ian | Hughes | M | | Western | VIS1 | | Sadie Herbert | 16/07/2007 | 17/07/2007 | | |

Note: it is also possible to book visitors in using **T&A.NET**. Select **Visitor booking** from the **Badges** menu and you will be able to view all visitor bookings as in **BKManager**. Click the **Add** button to add a booking in the same way as above.

Modify booking

In order to change information within a visitor record, click the **Modify** button on the **BKManager** main form. A form similar to the following will be displayed:

Title: Mr
 First Names:
 Surname:
 Sex: Male
 Company:
 Car Registration:
 Contact: Sadie Herbert
 Badge Type: Visitor Type 1
 Access group:
 Arrival Date: ...
 Expiry Date: ...
 Mobile Number:
 Email Address:
 Notes:

You can amend the details of the visit as you wish. Once all desired changes have been made, click the **OK** button on the top right of the screen to complete the modification and return to the main screen.

Remove booking

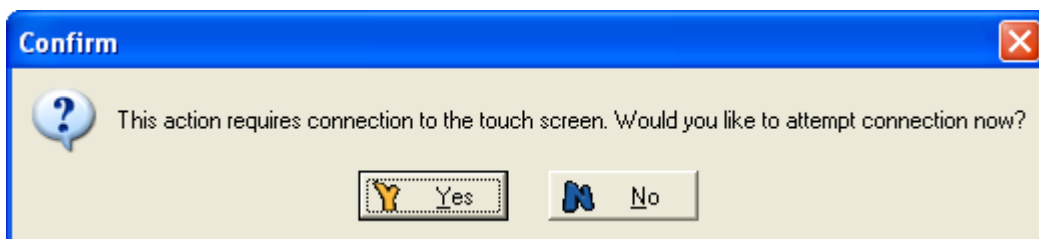
In order to delete a visitor record, first select the visitor you wish to remove in the grid, then click the **Remove booking** button on the **BKManager** main form. You will be asked to confirm whether or not you wish to delete the record.

Visitor arrival

In the event that a visitor has difficulty using the touchscreen, it is possible to set up the kiosk for them using **BKManager**.

In order to set up the touchscreen for the arrival of a specific individual, it is first necessary to connect remotely to the touchscreen. This can be done via the **Connect** button on the bottom of the main screen, see page 325 for details, or during the following process.

Click on the **Arrival** button on the **BKManager** main form. If you are not already connected to the touchscreen, a confirmation dialogue will appear:



Click **Yes** to connect to the touchscreen and continue Arrival setup.

Once you are connected to the touchscreen another dialogue will be displayed asking if you wish to set up the touchscreen for the arrival of your visitor. Click **Yes** to continue the arrival process.

You will now be returned to the main screen. A dialogue asking if details are correct will be displayed on the bottom left, as highlighted below:

| Assigned Badge | Title | First Names | Surname | Sex | Vehicle Reg. | Company | Badge Type | Access group | Contact | Arrival Date | Expiry Date | Mobile No | Email |
|----------------|-------|-------------|---------|-----|--------------|---------|------------|--------------|---------------|--------------|-------------|-----------|-------|
| | Mr | Ian | Hughes | M | | Western | VIS1 | | Sadie Herbert | 16/07/2007 | 17/07/2007 | | |

The box highlighted on the form above shows what your visitor will be seeing on the touchscreen, which you may now monitor from the main screen. Note that if the touchscreen is not utilised shortly after this dialogue is displayed, the touchscreen will return to its default screen.

Note: you must select the relevant touchscreen from the **Kiosk** drop down list in order to view it on the main screen above.

Return badge

When a visitor returns their badge, this should be registered on the system by selecting the visitor in the grid, and then clicking the **Return** button on the **BKManager** main form. A confirmation dialogue will appear. Click **OK** to continue. Once this has been done the visitor's badge will be registered as having been returned.

Print

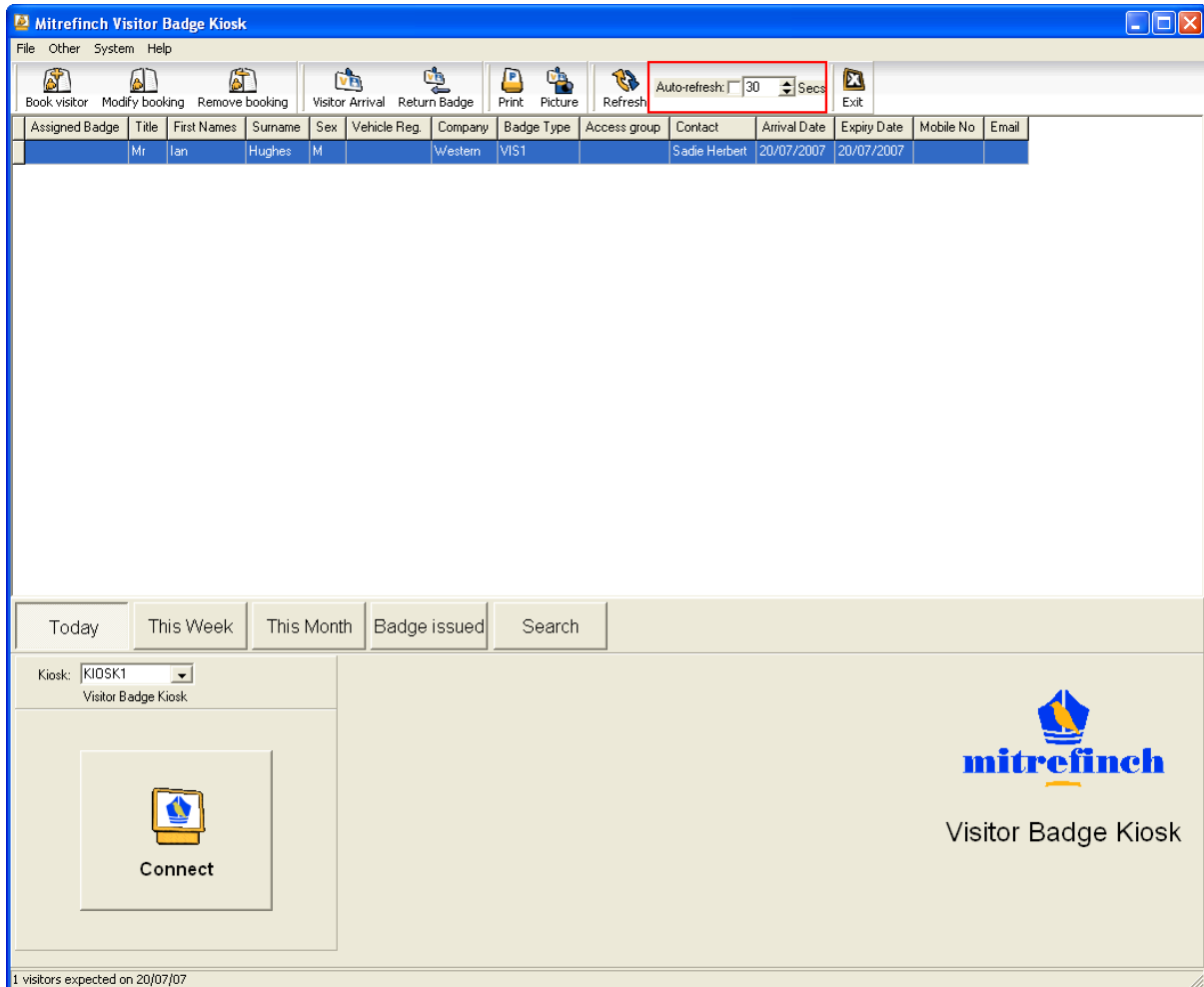
In order to print the current contents of the grid, first click on the **Print** button on the **BKManager** main form. A printing status advisory will be displayed, and then the current grid on the main screen will be printed out.

Picture

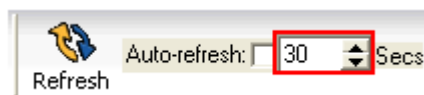
Once the visitor has been issued with a badge, click the **Picture** button on the **BKManager** main form. This allows you to see what the visitor looks like and identify them correctly on meeting them. The camera option also enables you to capture an image of the visitor for their badge.

Refresh

Click the **Refresh** button on the **BKManager** main form. This option is used to refresh the list of visitors on the main screen, in order to keep that list current and readily available to the user. The list can also be set to auto refresh using the box on the main screen, highlighted in the image below. Set a number to indicate how often the screen should refresh.

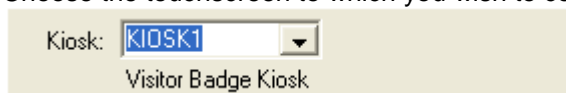


Tick the box to enable auto-refreshing of the visitor list. If Auto-refresh is not enabled, the **Refresh** button must be clicked to refresh the list. If Auto-refresh is enabled, the arrows beneath the checkbox:

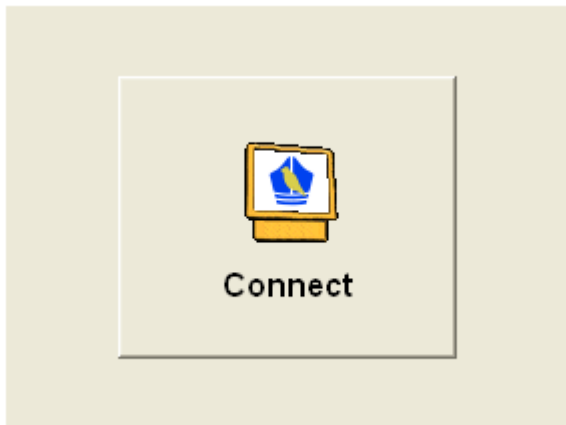


30.2.4 Connect to the touchscreen

Choose the touchscreen to which you wish to connect, from the drop-down list below:



The connect button is located on the bottom left of the **BKManager** main screen. It is used to connect the user remotely to the touch screen:



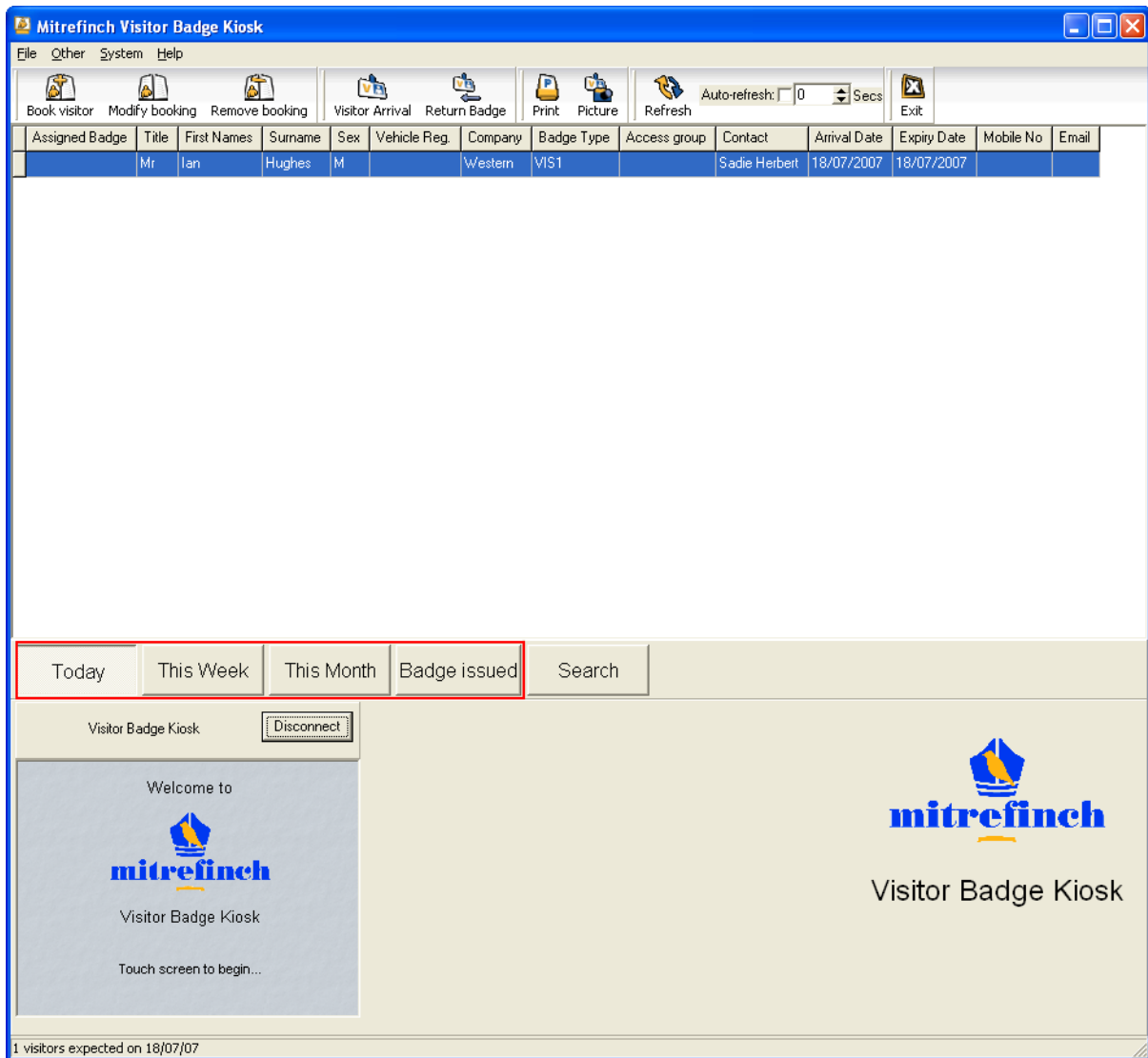
Once the connect button has been clicked, it will be replaced by the image currently on the touchscreen:

| Assigned Badge | Title | First Names | Surname | Sex | Vehicle Reg. | Company | Badge Type | Access group | Contact | Arrival Date | Expiry Date | Mobile No | Email |
|----------------|-------|-------------|---------|-----|--------------|---------|------------|--------------|---------------|--------------|-------------|-----------|-------|
| | Mr | Jan | Hughes | M | | Western | VIS1 | | Sadie Herbert | 16/07/2007 | 17/07/2007 | | |

This allows the user to monitor use of the touchscreen and exercise stronger access control. The settings for the connection to the touchscreen can be found in the **System** menu, which can be accessed from the top of the main screen.

30.2.5 Visitor arrival filter

You can filter visitors to view those arriving today, this week or this month, using the buttons highlighted below:



Search button

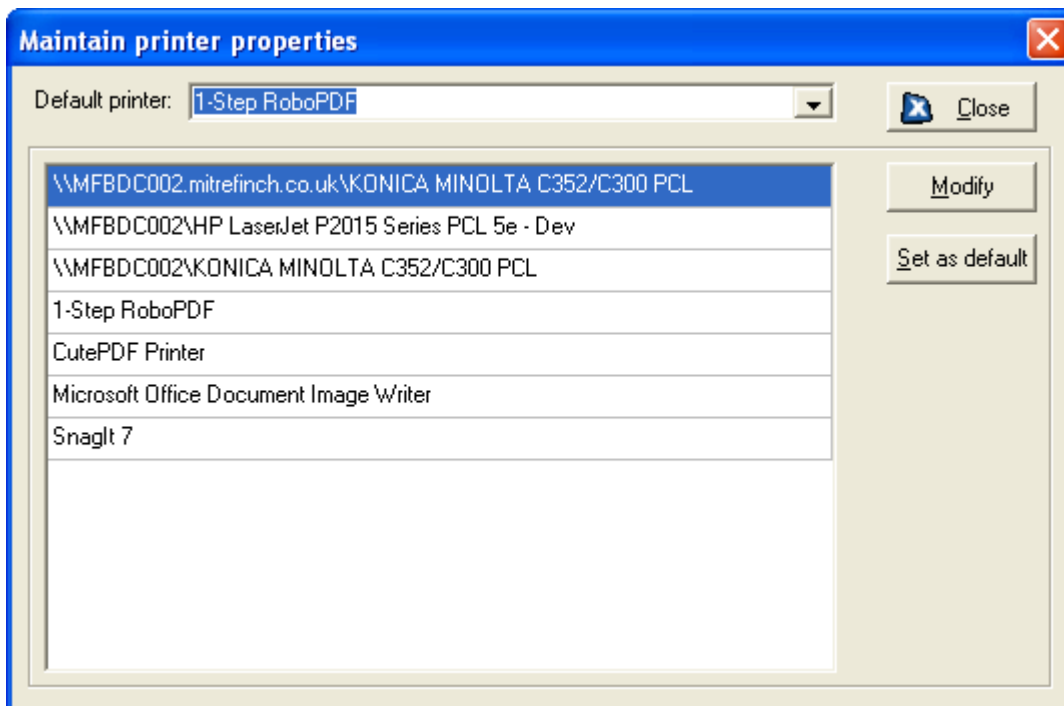
The **Search** button to the right of the Visitor arrival filter can be used to search for any visitor, using the fields entered in the **System Preferences** menu. Click on this button to display the following form:

| | | | |
|---------------------------------------|----------------------|--------------------------------------|----------------------|
| Surname: | <input type="text"/> | Contact: | <input type="text"/> |
| Forename(s): | <input type="text"/> | Badge issued: | Don't mind |
| Company: | <input type="text"/> | Car Registration: | <input type="text"/> |
| Date Range | | | |
| From: | <input type="text"/> | | |
| To: | <input type="text"/> | | |
| <input type="button" value="Search"/> | | <input type="button" value="Clear"/> | |

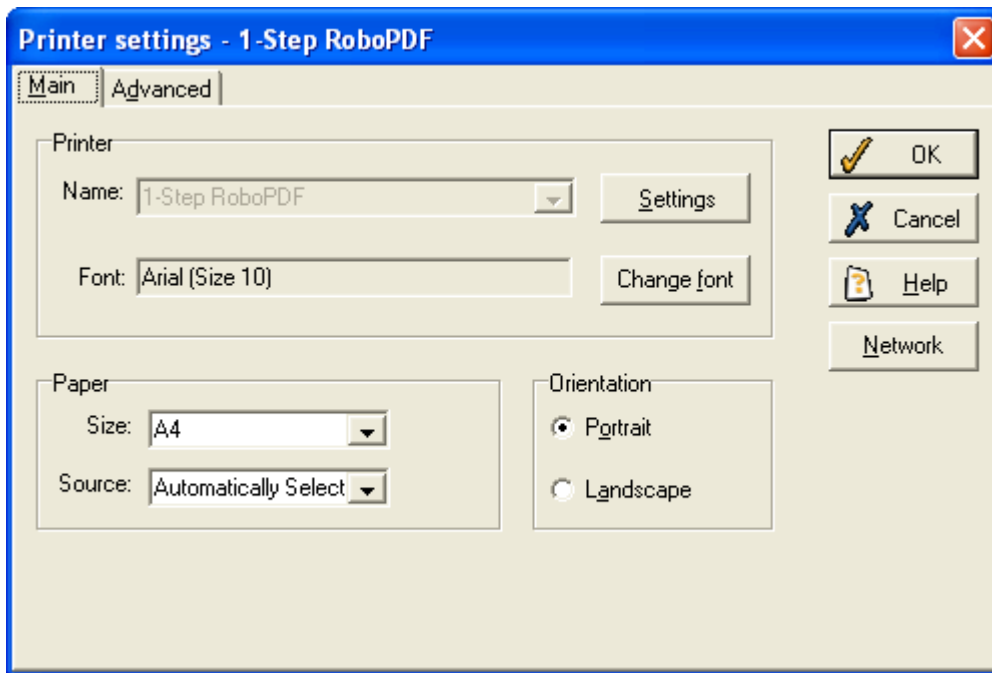
Enter in the appropriate details and then click **Search**.

30.2.6 Print settings

Before printing from **BKManager**, you should ensure that the correct printer has been selected. To do this select **Print settings** from the **File** menu on the main **BKManager** screen. A dialogue will be displayed allowing you to select the correct printer:



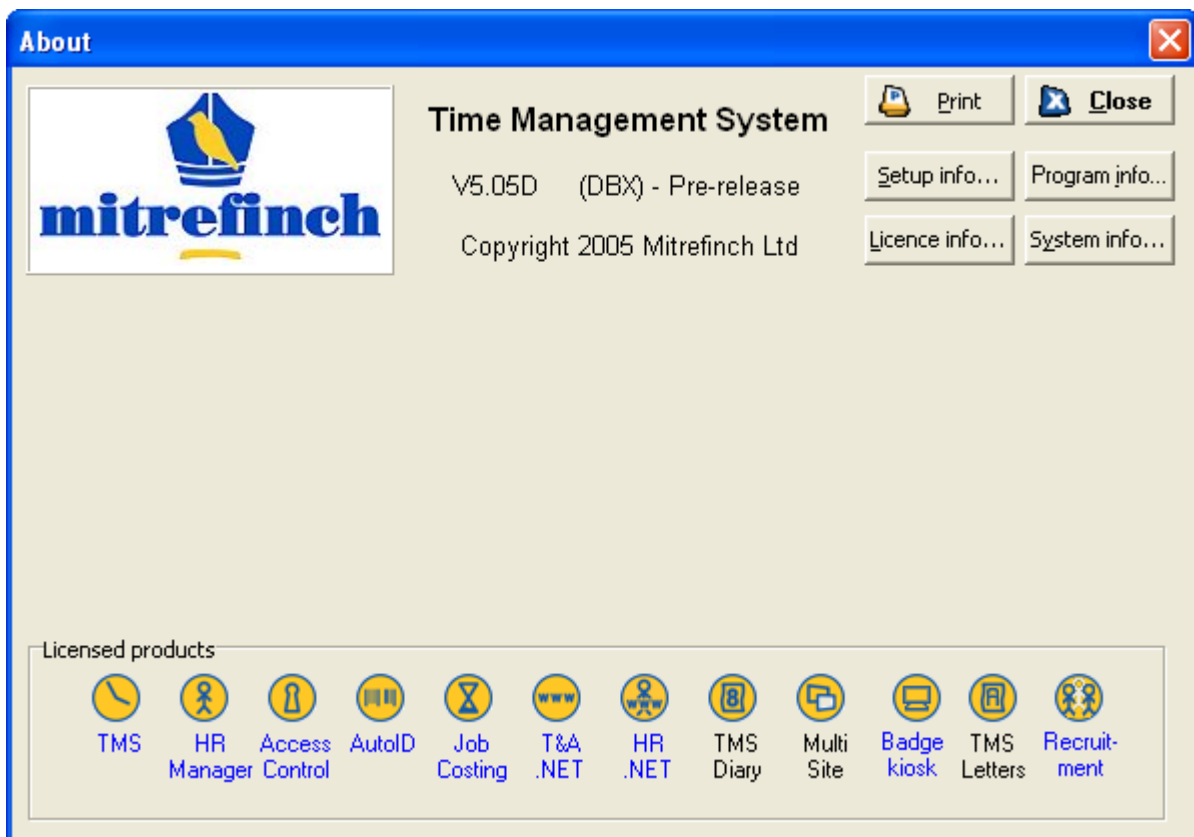
Click on the printer you wish to use, then click **Set as default** to select it. To check the printer settings, click the **Modify** button to display this box:



See your system administrator if you require further advice on printer settings.

30.2.7 How to find out what version you are running

To find out the **Visitor Badge Kiosk** version, select **About** from the **Help** menu on the toolbar at the top of the main screen. The following form will be displayed:



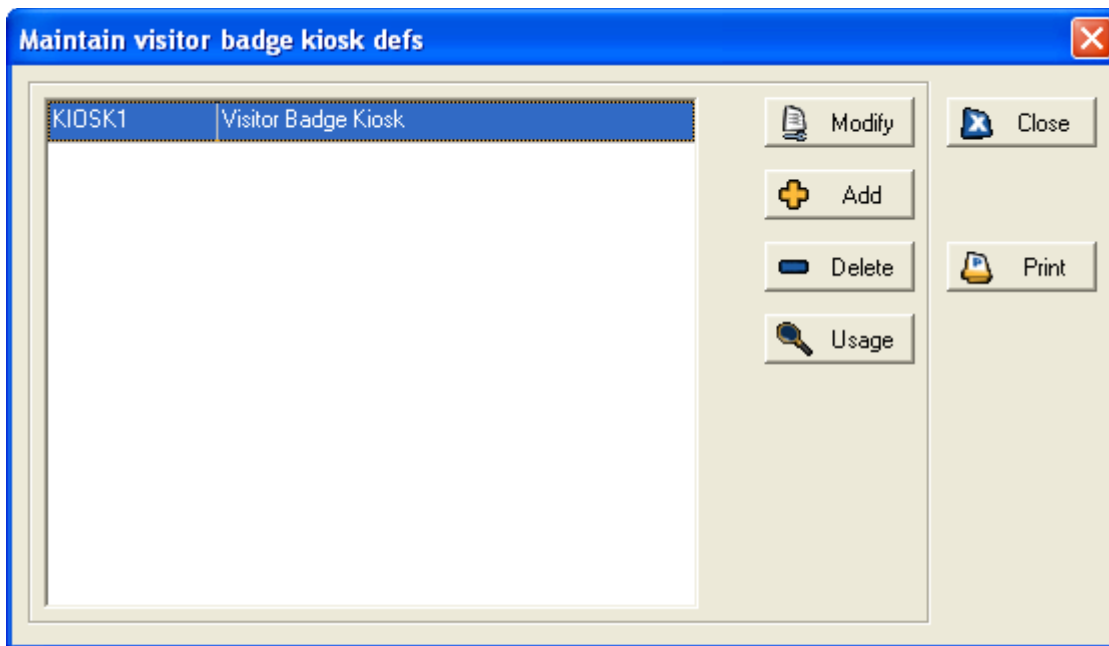
The version number is displayed in the centre of the screen. The remaining buttons on this form can display detailed information about your system. They should only be used when providing information to your network administrator or Mitrefinch Technical Support.

Notice the program icons at the bottom of the form. If the lettering beneath the icon is coloured blue you can click on a hyperlink to open a corresponding page of our web-site.

30.3 Badge Kiosk

30.3.1 Touchscreen setup

When setting up touchscreen kiosks you can define different kiosk parameters. Select **Set up badge kiosk parameters** from the **System** menu on the main screen. A screen similar to the following should be displayed:



The different badge kiosks you have set up will be displayed on the above screen. You can add, modify, delete or display the usage of any of the parameters using the relevant buttons.

Click the **Add** button on the above form. You will be asked to enter a name for the new kiosk parameter. The following form will then be displayed:

Maintain badge kiosk preferences

Appearance

If either of the below images is left blank, then default images will be used.

Front page image: ...

Background Image: ...

Custom Messages

Kiosk title:

Show site rules:

No badges instructions:

No design instructions:

Badge issue instructions:

Show vehicle registration

Connections

Kiosk hostname:

Kiosk port:

Manager port:

Email

Send arrival emails to contacts

Overlay Mode

Check this if the photo countdown is not displaying.

Disable Overlays

Name entry

Visitors sign in using their surname

Visitors sign in using their company name

Visitors choose to enter surname or company name

This form allows you to define the badge kiosk parameter preferences. The various options are explained in detail below:

Touch screen appearance

You can change the colour and font for the title screen and the background screens on the touchscreen interface. These colours may be altered used by clicking the relevant buttons in the **Appearance** section of the **Maintain badge kiosk preferences** form, displayed below:

You can also insert an image to be displayed on the front page of the touchscreen, and a background image to be displayed on every other page by clicking on the relevant fields, displayed below:

Front page image: ...

Background Image: ...

These images override the default Mitrefinch logos if used.

N.B. The **Visitor Badge Kiosk** software must be restarted in order for **Appearance** changes to take effect.

Custom messages

You can customise the name of the kiosk in the **Kiosk title** field.

You can have site rules displayed on the touchscreen by ticking the **Show site rules** box in the **Custom messages** section of the **Maintain badge kiosk preferences** form, displayed below:

The image shows a user interface element with a checkbox labeled "Show site rules:" on the left. To the right of the checkbox is a large, empty rectangular text area with a vertical scrollbar on the right side, intended for entering site rules.

Type any relevant rules into the blank box above if you wish to alert a visitor to codes of conduct on site.

You can also define customised messages to be displayed to the visitor:

The image shows three rows of text input fields. Each row has a label on the left and a text box on the right. The first row is labeled "No badges instructions:" and contains the text "There are no badges available. Please contact reception." The second row is labeled "No design instructions:" and contains the text "No badge design has been set. Please contact reception." The third row is labeled "Badge issue instructions:" and contains the text "Please return your badge to reception as you leave."

No badge instructions: this message will be displayed when the visitor has already confirmed their arrival and details, in the event that a badge has not been issued to them.

No design instructions: this message will be displayed when the visitor has already confirmed their arrival and details, in the event that a badge design has not been set for the visitor.

Badge issue instructions: this message will be displayed when the badge is issued to the visitor.

N.B. New custom messages will not take effect until the Visitor Badge Kiosk software has been restarted.

Connections

You should set the hostname of the PC on which the kiosk will run in the **Kiosk hostname** box below.

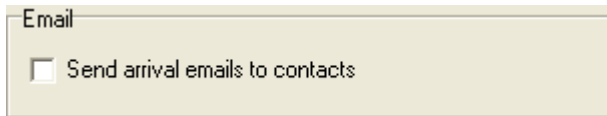
You can modify the ports utilised by the **Visitor Badge Kiosk** software, as well as the name of the host by which the touchscreen is connected through the **Connections** section of the **Maintain badge kiosk preferences** form, displayed below:

The image shows a form titled "Connections" with three input fields. The first field is labeled "Kiosk hostname:" and contains the text "TESTINGPC". The second field is labeled "Kiosk port:" and contains the number "8099". The third field is labeled "Manager port:" and contains the number "8098".

Note: you must only modify the ports if there is a conflict with another application. These preferences will usually have been set by your system administrator during software installation.

Email

An email can be sent automatically to the contact that a visitor is coming to see, notifying them of the visitor's arrival. This email will be sent as the visitor is being issued with their badge. In order to enable this option tick the tick box on the **Maintain badge kiosk preferences** form, displayed below:

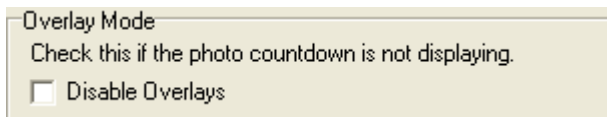


Email

Send arrival emails to contacts

Overlay mode

If your system has a camera attached, the touchscreen can take a picture of a visitor as part of the badge-making process (see page 325). Before the picture is taken, a three second countdown will be displayed. If this countdown is not being displayed, check the **Disable Overlays** box on the **Maintain badge kiosk preferences** form, displayed below. This should fix the problem.



Overlay Mode

Check this if the photo countdown is not displaying.

Disable Overlays

Name entry

You can determine how a visitor is to sign themselves in on the touchscreen, by selecting one of the three options on the **Name entry** section of the **Maintain badge kiosk preferences** form. This determines the first screen that visitors will see after they have touched the touchscreen for the first time. You can set the kiosk so that the visitor is required to sign in with their surname, their company name, or you can give the visitor the choice to enter their surname or company name.

30.3.2 Using the touchscreen

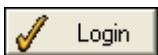
Logging in to the touchscreen

The touchscreen is the interface which visitors will use to receive their badges. To open the touchscreen select the **BADGEKIOSK** icon. The following login screen will appear:



Enter your user name and password. The default username is 'MASTER' and the default password is 'PASS'.

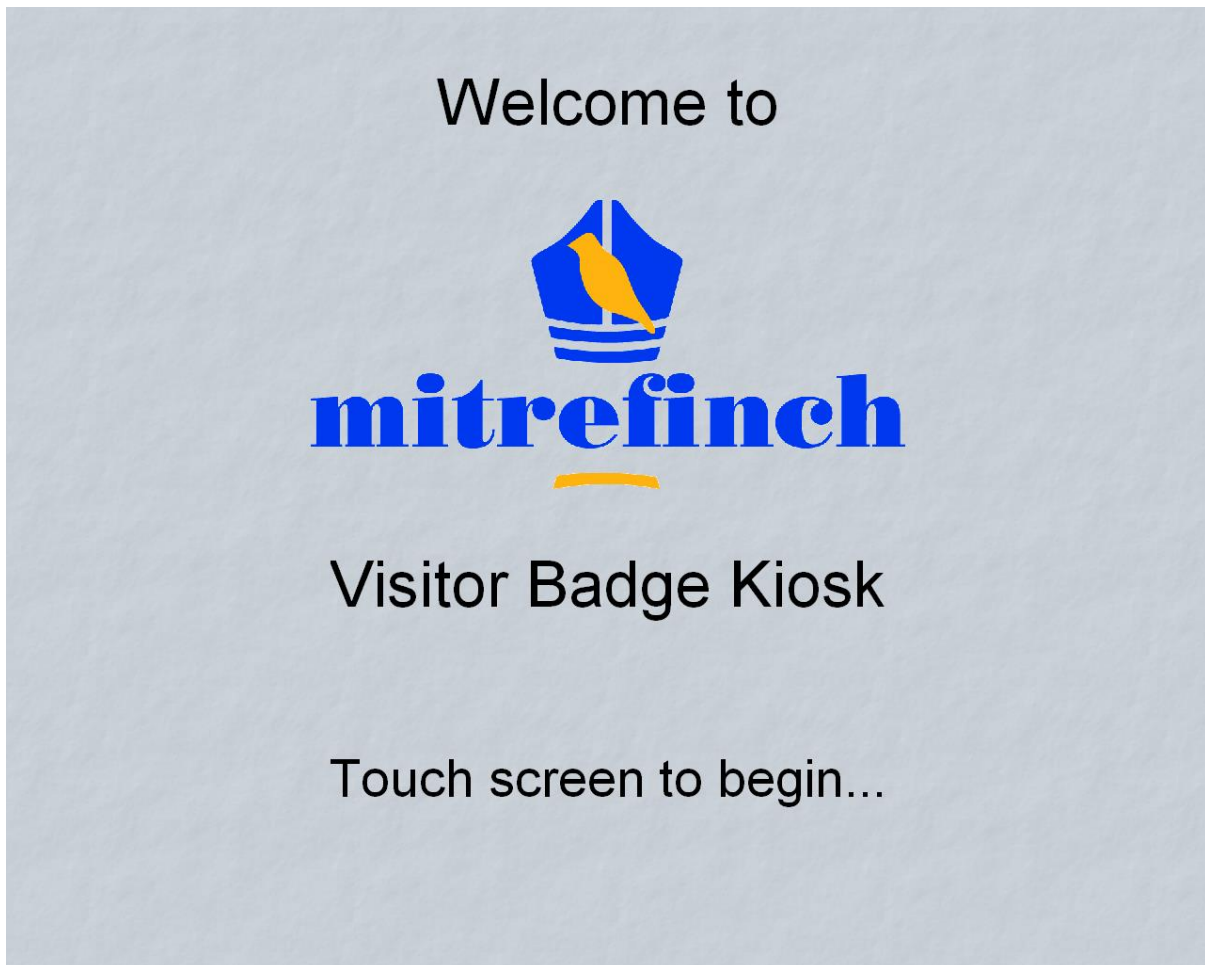
Then click the Login button:



The touchscreen title screen will appear, from which a visitor can begin the badge issuing process.

Touchscreen title page

When a visitor first approaches the touchscreen, a title screen similar to the one below will be displayed:



The visitor should touch the screen to continue the registration process. The images and fonts on the touchscreen title screen are customisable through the **Maintain badge kiosk parameters** option. For more details see **Touchscreen setup** page 330.

Visitor login


Once a visitor has touched the title screen, they will be required to sign in using either their surname or company name. As a third alternative, the visitor can be given the option to choose which information below, as in the screen below. For details of how to set the sign in criteria for a kiosk, see **Touchscreen setup** on page 330

ENTER COMPANY OR SURNAME

Do you wish to enter your company name
or your surname?

I wish to enter my company name

I wish to enter my surname



The visitor will then be required to enter either their surname or company name into the system, using the following screen:

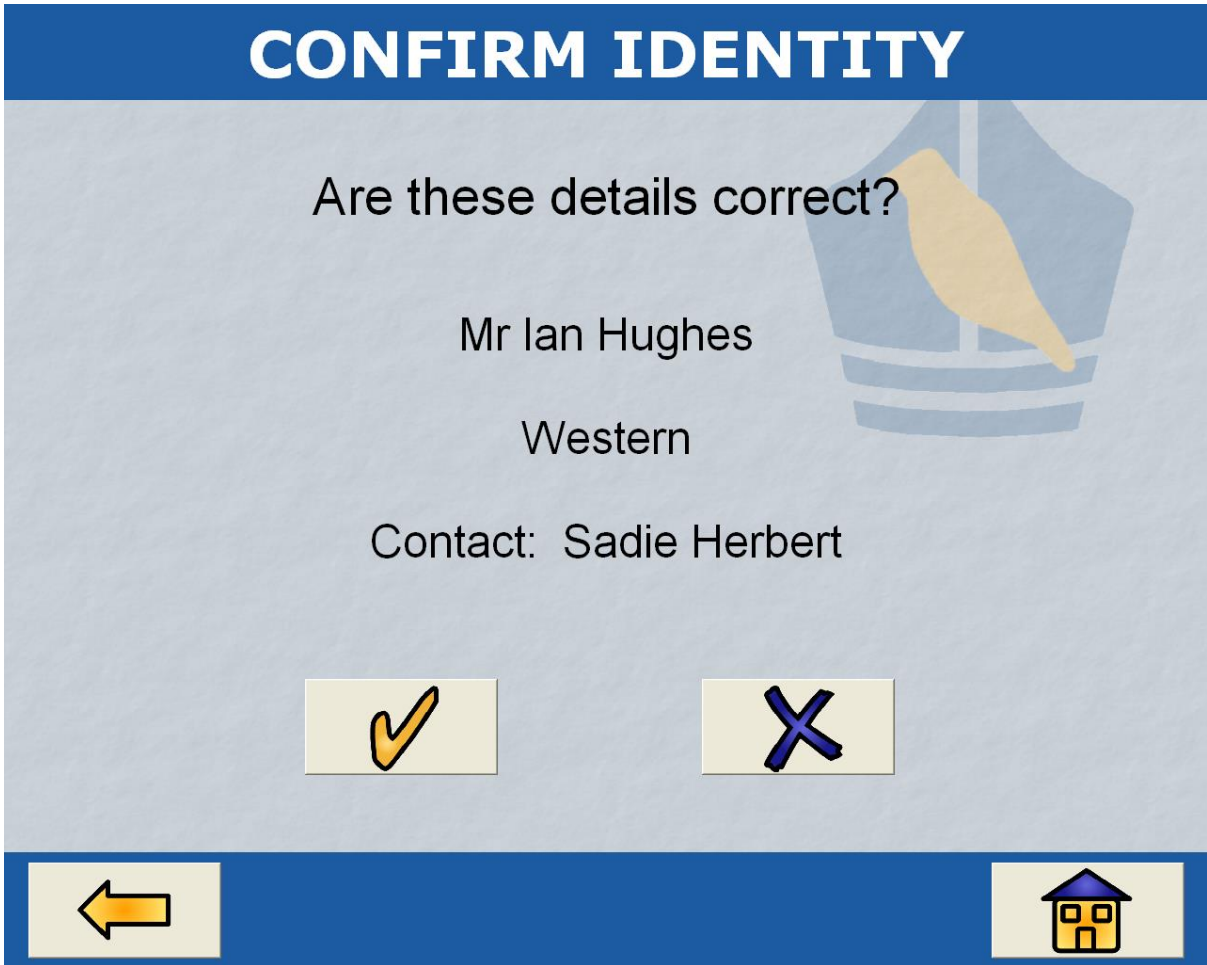
ENTER NAME

Please enter your surname



| | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| Q | W | E | R | T | Y | U | I | O | P |  |
| A | S | D | F | G | H | J | K | L | ' | |
| Z | X | C | V | B | N | M | - | | | |
|  | | | | | | | | | | |

The name entered is checked against the visitor list available from the main screen. If they are a registered visitor, they will proceed to a screen similar to the one below, confirming their name, company, and the name of the person they are going to see:



If these details are correct the visitor should touch the tick button on the bottom left of the screen to continue the registration process. If the details are incorrect, they should touch the x button on the bottom right of the screen. The system will then return them to the login screen.

If an individual is **not** a registered visitor, the following screen will appear:

UNRECOGNISED NAME

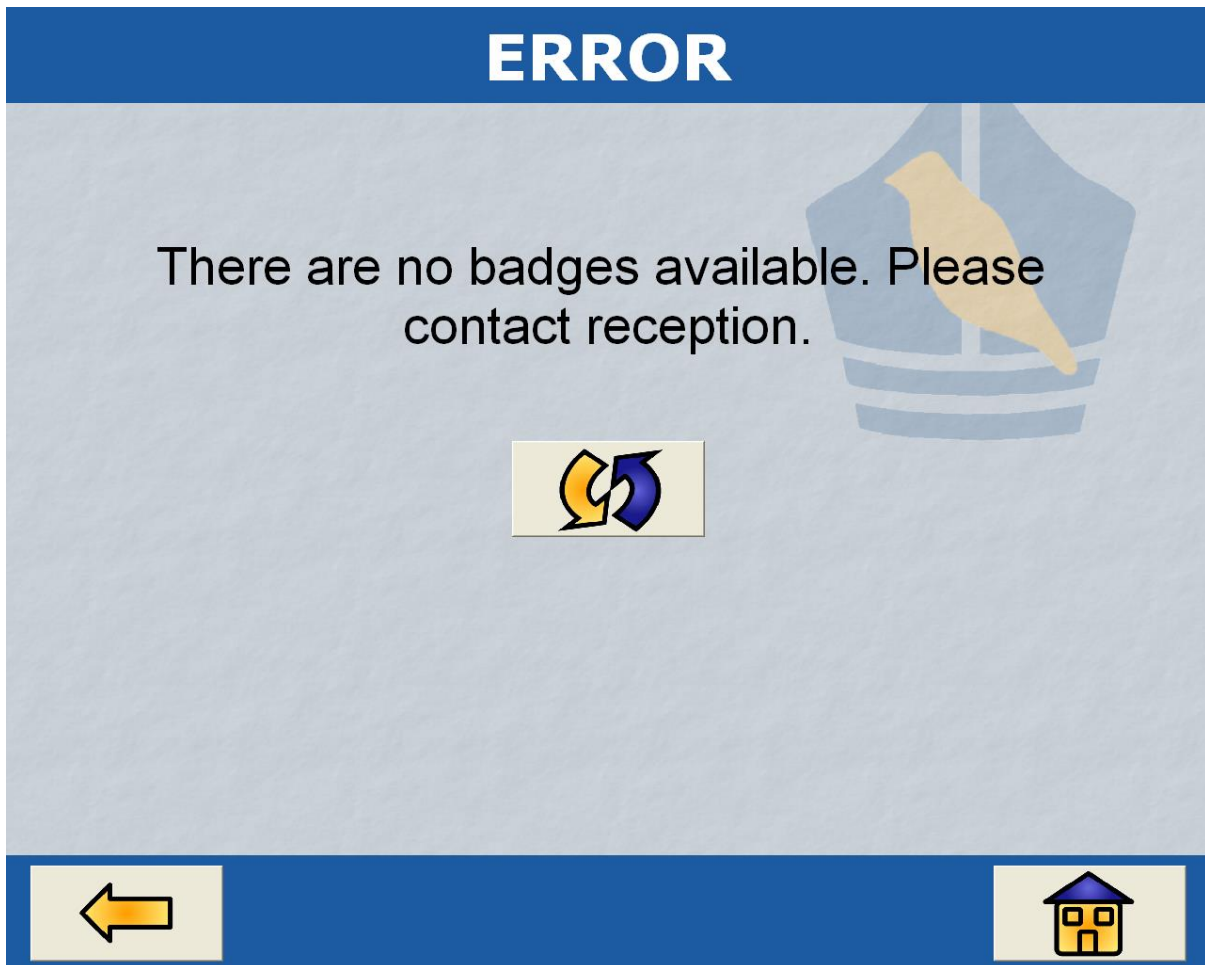
Your name may have been entered into the system incorrectly, or you may have mis-typed it.

Please try again.



The visitor may touch the dual arrow button in the centre of the screen to be returned to the log in screen. If not, the touchscreen will automatically return to the title screen within thirty seconds.

If there are no badges available, a screen similar to the following will be displayed:



It is possible to customise the message displayed by this screen through the **Maintain badge kiosk parameters** option. For more details see **Touchscreen setup** page 330.

Touchscreen car registration

Once a visitor has entered their name and confirmed their details on the touchscreen, they will be presented with a screen providing them with options regarding their car registration, provided that this option has been specified on the kiosk parameters form, see **Touchscreen setup** on page 330 for more details.

CAR REGISTRATION

Please select from the following options:

The registration number of my vehicle is Y108TBX



I will enter the registration number of my vehicle



I do not know the registration number of my vehicle



I do not have a vehicle with me



Note: Please note that the first option, 'The registration number of my vehicle is...' will ONLY be displayed if the visitor has already provided those details and they have been entered on the system.

If the visitor knows the registration number of their vehicle, they may choose to enter it, at which point the following screen will be displayed:

The visitor should enter their registration details, and then touch the tick box to confirm. If the registration details entered are new, then those details on the system will be modified.

If the visitor does not know the registration of their vehicle, they should choose the relevant option. Their registration details will be entered into the system as 'UNKNOWN' and they will be allowed to continue the registration process.

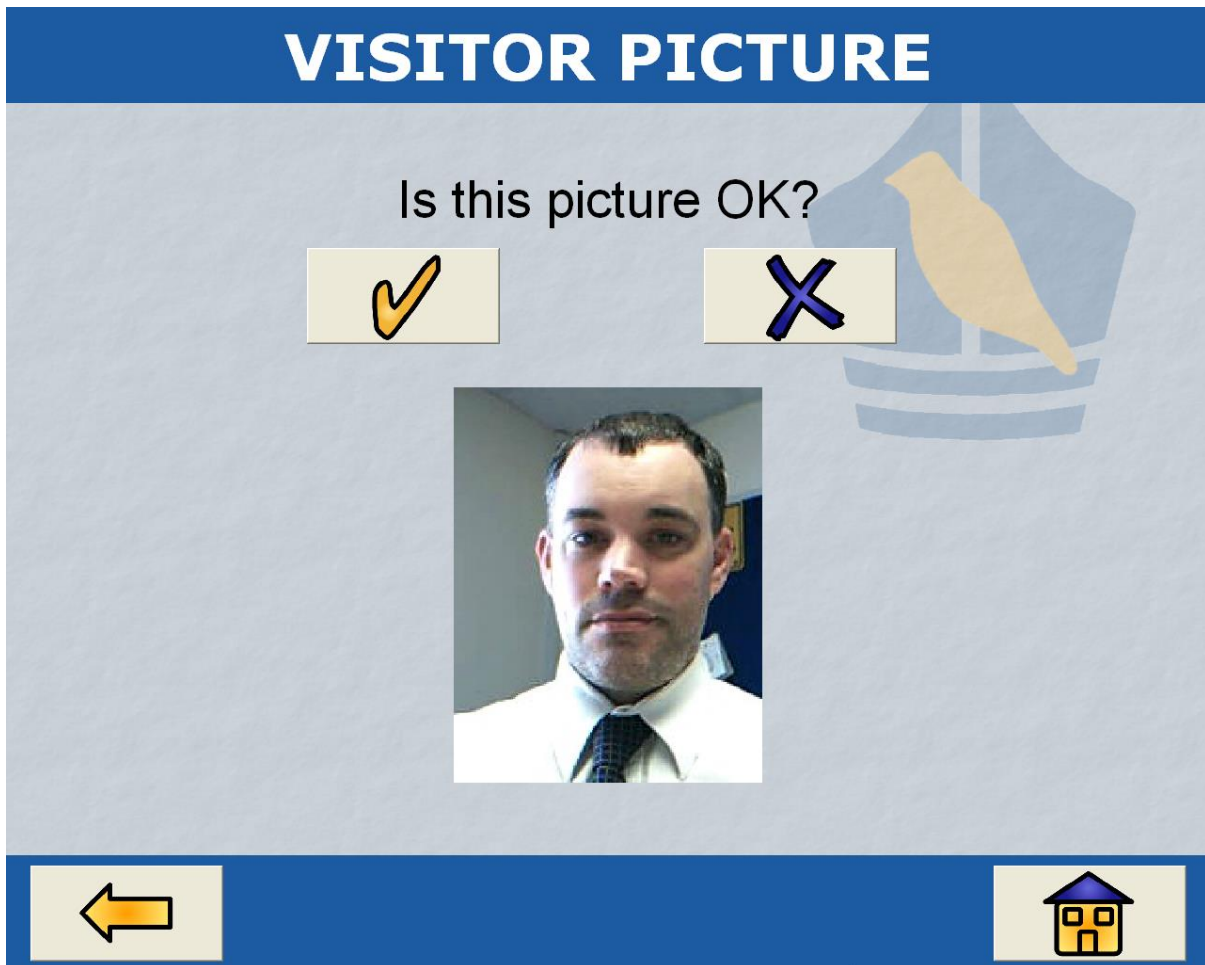
If the visitor did not bring a vehicle, they should choose the relevant option, and they will be taken directly to the next stage of the registration process.

Picture identification

Press **Alt+C** to open a form similar to the following, allowing you to select a camera to use:

It is possible that you may have to restart the program after the camera has been selected. If a camera is available, once a visitor has provided any vehicle registration details, their picture will be taken. The visitor should place their head within the oval, and touch the camera icon. A three second

countdown will begin, after which the system will take a picture. Once the photo has been taken, they will have the option to accept or reject the picture:



If a red oval and countdown are not displayed over the camera image, your system does not support overlays. Please click **Disable Overlays** on the **Maintain badge kiosk preferences** form. See **Touchscreen setup** on page 330 for details.

Badge issued

If a camera is not available, or once a picture has been taken, the visitor will be taken to the **Badge Printing** screen:

PRINTING BADGE

Your badge is printing now



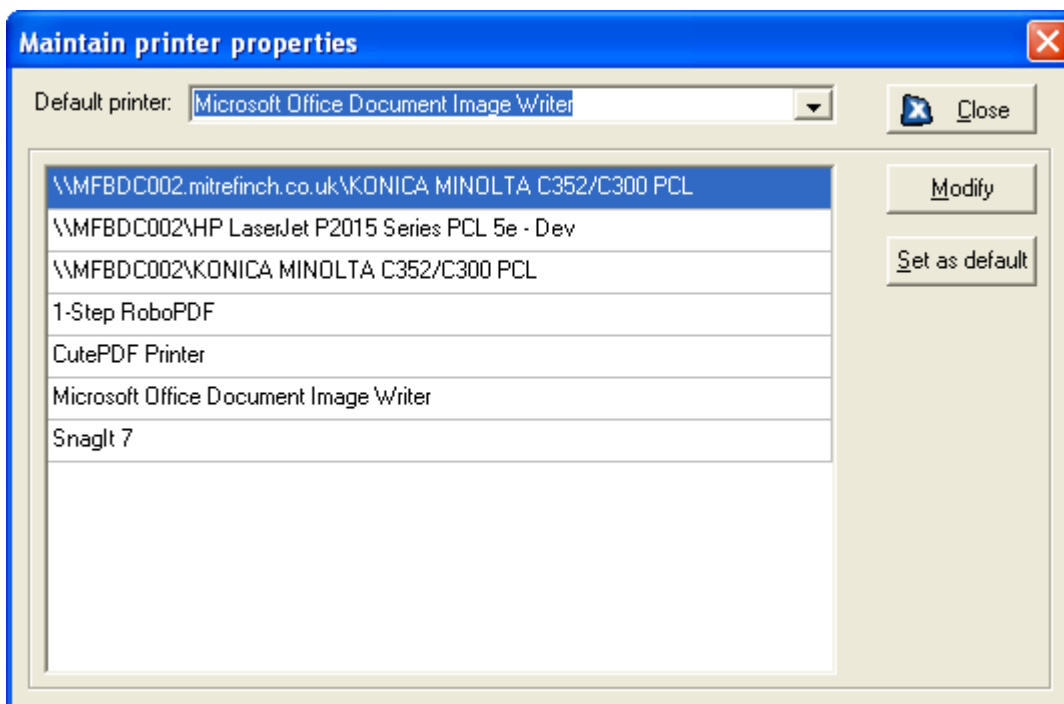
Please ensure that your card is swiped once on the reader provided. Also take and use a holder to ensure your badge is on display.

Redirecting to front page in 4 seconds.



Once the badge has finished printing, the visitor should retrieve it. The screen will reset to the front page automatically.

N.B. Press **Alt+P** to display the following form, allowing you to select and set up the printer:



The printer which you wish to use for the badge printouts should be set as the default.

Note that the message displayed below the image of the badge can be customised on the **Maintain badge kiosk preferences** form. See **Touchscreen setup** on page 330 for details.

Command line parameters

When running **Badge Kiosk** there are two command line parameters that can be used, one optional and the other mandatory.

Badge Kiosk name

The name of the touchscreen must be specified using the 'kiosk' command line parameter. For example, when creating a short-cut, you might add the following:

```
BADGEKIOSK.exe KIOSK=KIOSK1
```

Display cursor

You may wish to use **Badge Kiosk** on a non-touch screen computer. In this case you will need to display the cursor. This can be achieved by adding the command line parameter:

```
BADGEKIOSK.exe KIOSK=KIOSK1 CURSOR=Y
```

31 Poller and Processor as a service

31.1 Installation

31.1.1 Introduction

The **Poller** and **Processor** are a vital part of the **Mitrefinch TMS** package. They collect and store information from terminals (including clock-in's and clockout's), providing status information to those terminals, and process the information which has been collected.

Previously, the polling and processing software has been run as an application in Windows; however, it is now possible to run it as a Windows 'Service'. This means that it automatically starts up when a PC is booted up, without anyone having to log in. This also means that the software is now completely automated: it can start, stop and pause itself as necessary with no user interaction required.

31.1.2 Installation files

In order to run Poller and Processor as a service, four programs are required; these should have been included on your most recent installation CD. These programs are:

1. `tmspoller.exe` , which is the Poller service
2. `tmsprocessor.exe`, which is the Processor service
3. `tmsmonitor.exe` , which checks Poller or Processor to make sure that they remains stable and secure

These programs should be copied to the PC on which they will be run.

N.B. Poller should run on a separate PC to your SQL server. If it does not, the Poller service may start up before the SQL server when the PC is started up, and an error will occur.

31.1.3 Local installation

To install Poller and Processor as a service and their associated programmes onto a local PC, it is first necessary to enter the Windows command line interface via the Start bar and the **Run** button.

Installing Poller

Once at the command prompt, type the following to install Poller 1:
tmspoller /install /poller=1

and to install the monitor for that Poller, type:
tmsmonitor /install /poller=1

Poller 1 should now be installed. To install other pollers change the numeral to match the poller you are installing. Most sites will only require Poller 1. Poller should now install.

Note: throughout this user guide '=1' may be replaced with the number of the poller/processor you wish to (un)install preceded by =. You should only create additional pollers or processors on a site after you have contacted Mitrefinch.

Installing Processor

Once at the command prompt, type the following to install the Processor:
tmsprocessor /install /processor=1

and to install the monitor for the Processor, type:
tmsmonitor /install /processor=1

Processor should now install.

Once these files have been installed, you should run System Generator (sysgen.exe) and hit the **Upgrade** button. Poller and Processor as a service should now be available to run.

31.1.4 Remote installation

In order to install Poller and Processor as a service on a PC different to the one which you are using (that is, a Remote PC), it is first necessary to enter the Windows command line interface via the Start bar and the **Run** button.

Remote installation of Poller

Once at the command prompt, type the following to install Poller on a remote PC:

```
tmspoller /install /remote /computer=computername /path=c:\apps\tms[poller.exe /poller=1
```

and to install the monitor for Poller, type:

```
tmsmonitor /install /remote /computer=computername /path=c:\apps\tmsmonitor.exe /poller=1
```

Poller should now install on the remote PC specified as 'computername' in the above example.

Remote installation of Processor

Once at the command prompt, type the following to install Processor on a remote PC:

```
tmsprocessor /install /remote /computer=computername /Path=c:\apps\tmsprocessor.exe  
/processor=1
```

```
tmsmonitor /install /remote /computer=computername /Path=c:\apps\tmsmonitor.exe  
/processor=1
```

31.1.5 Un-installing

If it becomes necessary to un-install the Poller and Processor software, you must first access the Windows command line interface via the Start bar and the **Run** button.

Un-installing Poller

Once at the command prompt, the following should be entered to uninstall Poller and its monitor on a local machine:

```
tmspoller /uninstall /poller=1  
tmsmonitor /uninstall /poller=1
```

If you need to uninstall Poller **remotely**, on reaching the command line interface it is necessary to type:

```
tmspoller /uninstall /remote /computer=computername /Path=c:\apps\tmspoller.exe /poller=1
```

and to uninstall the monitor for Poller:

```
tmsmonitor /uninstall /remote /computer=computername /Path=c:\apps\tmsmonitor.exe  
/poller=1
```

Poller should now be un-installed.

Un-installing Processor

Once at the command prompt, the following should be entered to un-install Processor and its monitor on a local machine:

```
tmsprocessor /uninstall /processor=1  
tmsmonitor /uninstall /processor=1
```

If you need to un-install Processor **remotely**, on reaching the command line interface it is necessary to type:

```
tmsprocessor /uninstall /remote /computer=computername /Path=c:\apps\tmsprocessor.exe  
/processor=1
```


and to un-install the monitor for Processor:

```
tmsmonitor /uninstall /remote /computer=computername /Path=c:\apps\tmsmonitor.exe /processor=1
```

Processor should now be un-installed.

31.1.6 System tray monitor

The system tray monitor allows you to control the various options available for the Poller and Processor service. To run this monitor, it is first necessary to access the Windows command line interface.

Running the Poller

Once at the command line interface, type:

```
tmscontroller /poller=1
```

in order to begin running the **System tray Monitor** for the Poller

Running the Processor

Once at the command line interface, type:

```
tmscontroller /processor=1
```

in order to begin running the System tray Monitor for the Processor.

31.1.7 Service parameters window

This window is accessible via the **Options** menu. From this window it is possible to set the more technical aspects of the Poller and Processor software. Please note that you need to set these parameters for the poller and processor separately. When the window is first accessed, it will look similar to the following:

The screenshot shows a Windows dialog box titled "Modify service parameters". The dialog is organized into three main sections:

- Service:** Contains input fields for "Domain:", "User name:", and "Computer name:". Below these are a "Restart on error:" checkbox (checked with 'Y'), a "Restart after:" spinner set to "1" with the unit "Minutes", a "Keep log entries:" spinner set to "14" with the unit "Days", and a "Delay after Windows restart:" spinner set to "0" with the unit "Minutes".
- Monitor:** Contains a "Log check interval:" spinner set to "2" with the unit "Seconds".
- Processor:** Contains three dropdown menus labeled "Code field:", "Start code:", and "End code:".

On the right side of the dialog, there are "OK" and "Cancel" buttons. A "Set password" button is also visible, positioned between the "User name:" and "Computer name:" fields.

Domain

This will be the Domain which you log on to in order to access the service. If you are unsure of your domain name, please contact your system administrator.

Username/Password

The Username and Password are those required to log on to windows to access the network data directory. The user **MUST** have permission to log on as a service on their local machine. Go to **Control Panel**, then **Administrative tools**, then **Local Security Policy**, then **Local Policies** and then **User Rights Assignment**. Look for the setting **Log on as a service** and add the user to this.

Computer name

This is the name of the PC which the Poller software is running on. If you do not know the name of this PC, consult your System Administrator.

Restart On Error/Restart after

You can select whether or not the Poller/Processor software will restart if it detects an error. It is also possible to set the interval (in minutes) after which the Processor will restart itself if an error causes it to close.

Keep log entries

The Processor messages are logged in tables on the database. This field specifies how long to keep the entries in the log.

Delay after Windows Restart

If there are problems with the Processor software startup, this option allows you to set a delay after Windows startup before the software initialises.

Processor pane

The processor pane only appears on the above form if you are working with the Processor. This pane allows you to set the codes which you wish to be processed.

The image shows a screenshot of a software configuration window titled "Processor". It contains three dropdown menus. The first is labeled "Code field:" and has "TMSTMS.OTHERCODE" selected. The second is labeled "Start code:" and is empty. The third is labeled "End code:" and is empty.

The **Code field** allows you to select from a list of valid code tables the one which contains those codes which you wish to process. The **Start code** and **End code** allows you to specify where the processing begins and ends.

31.2 General system use

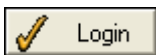
31.2.1 Logging in

Once you have started **System Tray Monitor** (see **System tray monitor** on page 348) a login screen similar to the following will be displayed:



Enter your user name and password. The default username is 'MASTER' and the default password is 'PASS'.

Then click the **Login** button:

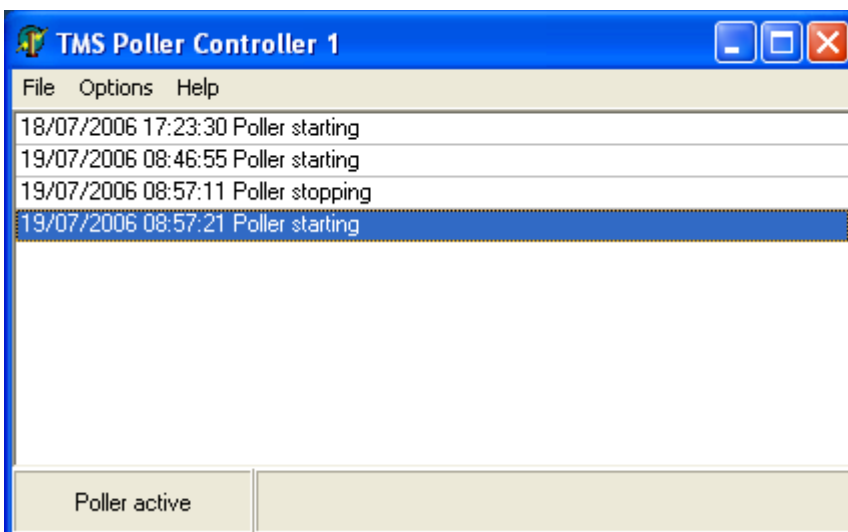


The main form appears, from which you can access all areas of the poller or processor software. Also in the system tray a poller (Blue Terminal) or processor (Silver Cog) icon will appear.

31.3 Poller

31.3.1 Poller main form

Once you have successfully logged in, a screen similar to the following will be displayed:



The line of text at the top of the screen identifies which of the poller controllers you are running; the main field displays status messages regarding your clocks.

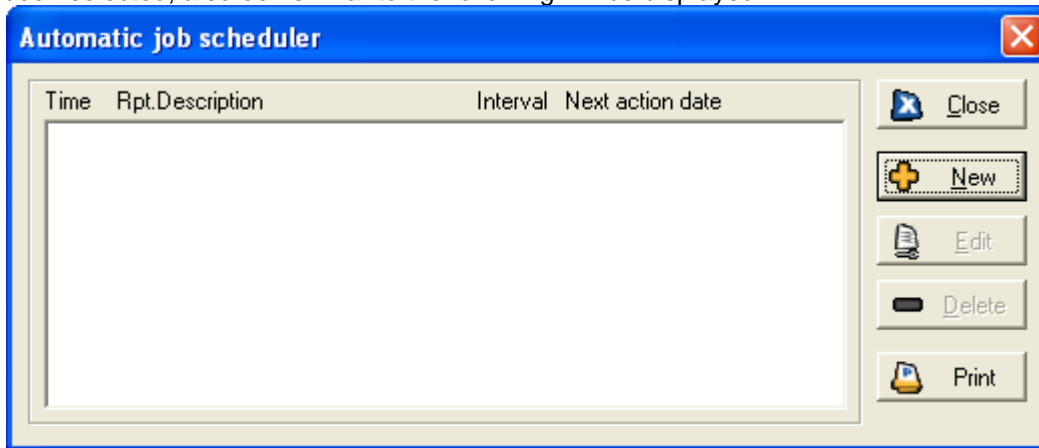
The pane in the bottom left indicates whether the poller is running, or whether it has been stopped.

Above the main form is a toolbar consisting of **File**, **Options** and **Help** menus. These will be covered below.

31.3.2 Automatic job scheduler

Automatic job scheduler

The automatic job scheduler is accessible via the **File** menu at the top of the main screen. Once it has been selected, a screen similar to the following will be displayed:



Commands already on this list can be edited or deleted by highlighting the required command and clicking on the **Edit** or **Delete** button on the right hand side. The **Print** button can be clicked to print out a copy of the current list of scheduled jobs.

Add a new job

To add a new job to the automatic schedule, click the **New** button, displayed on the right hand side. The following screen will be displayed:

Job details

Job type
 Download employee details

Job frequency
 Manual
 Temporary
 Repeat daily
 Repeat other

Next action at
 0:00 on 15/05/2007 ... Now

Terminals on this poller
 All

Biometrics
 Include template in download

OK
 Cancel

You may select jobs to be scheduled from the pull down menu at the top of this window. The available job commands are covered in section 22 of this manual, on (page 260)

Commands

A command is an instruction for the processing program to perform a particular task outside normal scheduled events, and can be issued at any time. A summary of all commands is as follows:

| No. | Command | Description | Used By |
|-----|---------------------------|---|-------------|
| 1 | Cancel transfers | Used to cancel any time-consuming table downloads that are not really necessary. | PC Only |
| 2 | Configure | If any terminal function has been altered then the new configuration needs to be sent to the terminal. | PC&Terminal |
| 3 | Download Employee Details | Sends employee information to the terminal to be displayed when employee registers. | PC&Terminal |
| 4 | Download Timezones | Used for access control systems. Sends details of when employees are allowed access. | PC&Terminal |
| 5 | Download Works Rules | (Flexitime only) Sends details of shifts so a flexitime balance can be calculated at the terminal. | PC&Terminal |
| 6 | Poll (Empty Clocks) | Mainly for terminals linked via a modem. Retrieves all clockings from it. | PC&Terminal |
| 7 | Recover Clockings | Normally used when employee data has been restored from a backup and you need to ask the terminals to re-send all | PC&Terminal |

| | | | |
|----|---------------------------|---|---------------|
| | | clockings from a specified date. | |
| 8 | Refresh Poller | If you change the properties of terminals then you must tell the polling program to read the new values. Could do the same thing by using the send dormant command. | PC Only |
| 9 | Send Poller Dormant | Stops the poller for a specified amount of time to allow a backup of the TMS data to be done. | PC Only |
| 10 | Stop Poller | Stops the poller. | PC Only |
| 11 | Synchronise Clocks | Sets time on terminals to that on PC. Ensure time on PC is up to date before this is attempted. | PC&Terminal |
| 12 | Door Control | Opens/closes a group of doors in event of emergency. | PC Only |
| 13 | FES BST Change | (Fire evacuation systems only) Adjust time for BST time change. | PC Only |
| 14 | FES Download Descriptions | (Fire evacuation systems only) Downloads names of departments, job grades etc. to FES PC. | PC Only |
| 15 | Master Reset | Performs a master configuration on the terminal. (PLEASE BE AWARE THAT THIS DELETES ALL THE CLOCKINGS AND TABLES THE TERMINAL MIGHT HOLD - USE WITH EXTREME CAUTION). | Terminal Only |
| 16 | Refresh Single Employee | For access control. Downloads new details for one employee. | PC&Terminal |
| 17 | Remove Badge | For access control. Removes specific badge ID at terminals. | PC&Terminal |
| 18 | Remote Employee Access | For access control. Removes employee access at terminals. | PC&Terminal |
| 19 | Send Employee Message | Sends a message to the terminal for a single employee. | PC&Terminal |
| 20 | Synchro for Master | Causes poller to synchronise all clocks to the master clock (if installed). | PC Only |

Job frequency

How often a job command will be performed can be accessed from the **Job Frequency** pane in the **Job Detail** window, accessible by clicking either the **New** or **Edit** buttons of the automatic job scheduler.

Job frequency

Manual

Temporary

Repeat daily

Repeat other

If **Repeat other** is selected, a box allows you to select the number of days between jobs.

After selecting job frequency, enter the time and date when the command is to be executed in the **Next at** pane:

Next action at

0:00 on 19/07/2006 ... Now

If **Repeat daily** or **Repeat other** were selected, this is the base date and time at which the repeated command will be performed. If **Manual** or **Temporary** were selected, you can click the **Now** box to put the command at the top of the current job list.

Terminals on the poller

If you wish the specified command to be applied to all terminals, tick the All box, or remove the tick to select a terminal from the list that is displayed, as below:

Terminals on this poller

All Term Ref: 9 Re-read emps

If you wish the selected terminal to re-download a list of employees in concurrence with your selected command, tick the **Re-Read Emps** box. If you want the terminal to only download those employees it utilised the last time a command was performed, un-check this box.

Biometrics

To include biometric data in the employee download of the terminal, check the box in the biometrics section:

Biometrics

Include template in download

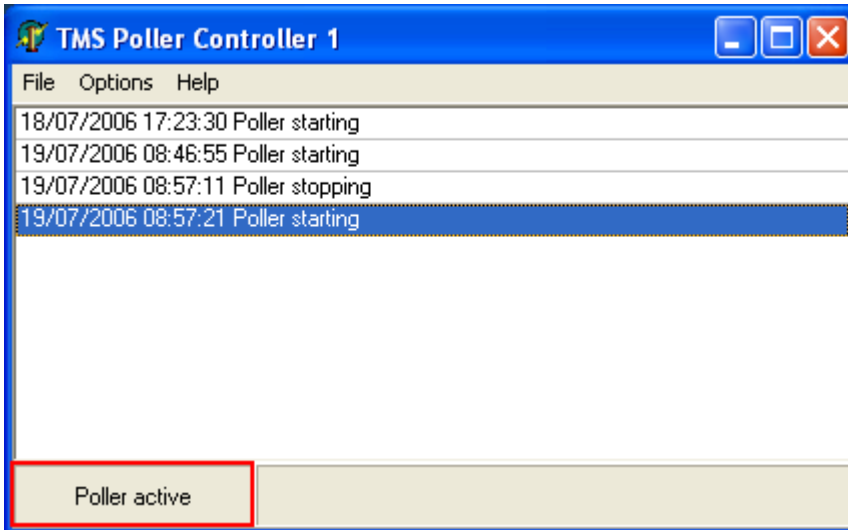
To include biometric data in the employee download of the terminal, check the box in the biometrics section:

Issuing commands

Click the **OK** button to issue a job, or the **Cancel** button to return to the main job scheduler window. If in need of assistance, click **Help** to be taken to the interactive help system for this program.

31.3.3 Start/Stop Poller

The option to Start or Stop the Poller can be found in the **File** menu of the system tray monitor program. **Start Poller** starts the Poller if it is not already running; this is indicated by the status window in the bottom left of the screen. If Poller is running, the message **Poller Active** will be displayed:



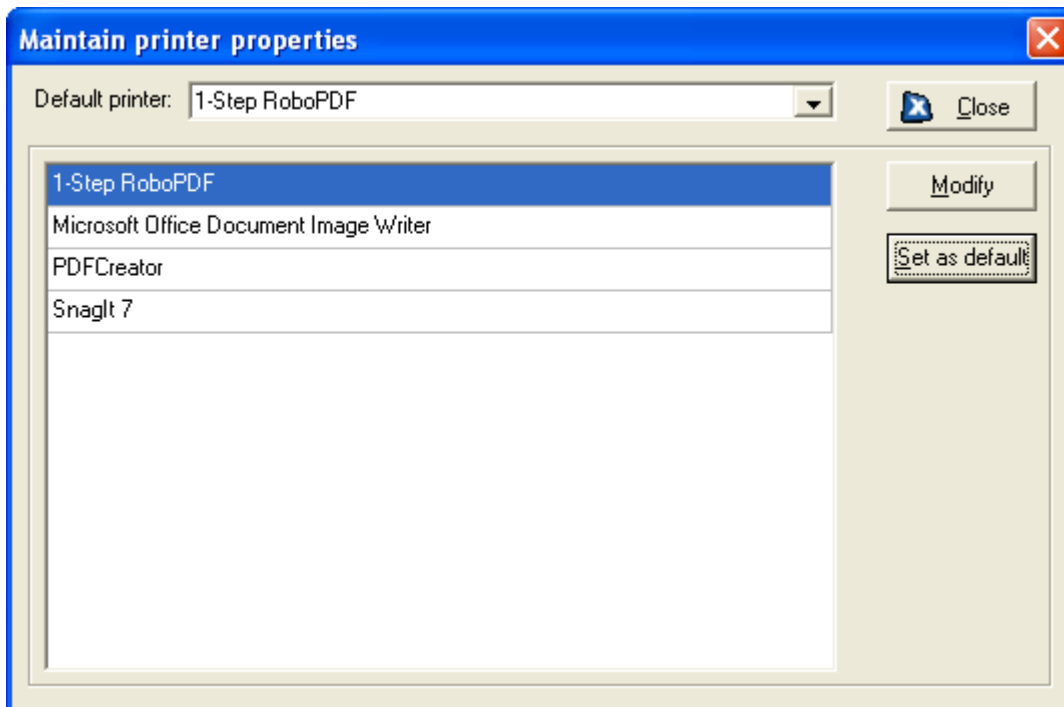
If you wish to stop Poller temporarily, the **Stop Poller** command should be used. It is located in the **File** menu at the top of the main form. If Poller is not running, or if you have stopped Poller manually, **Poller Stopped** will be shown in the status window:



N.B. This method of stopping Poller should NOT be confused with the **Stop Poller** command (see p. x), which will shut Poller down entirely and close the program when used.

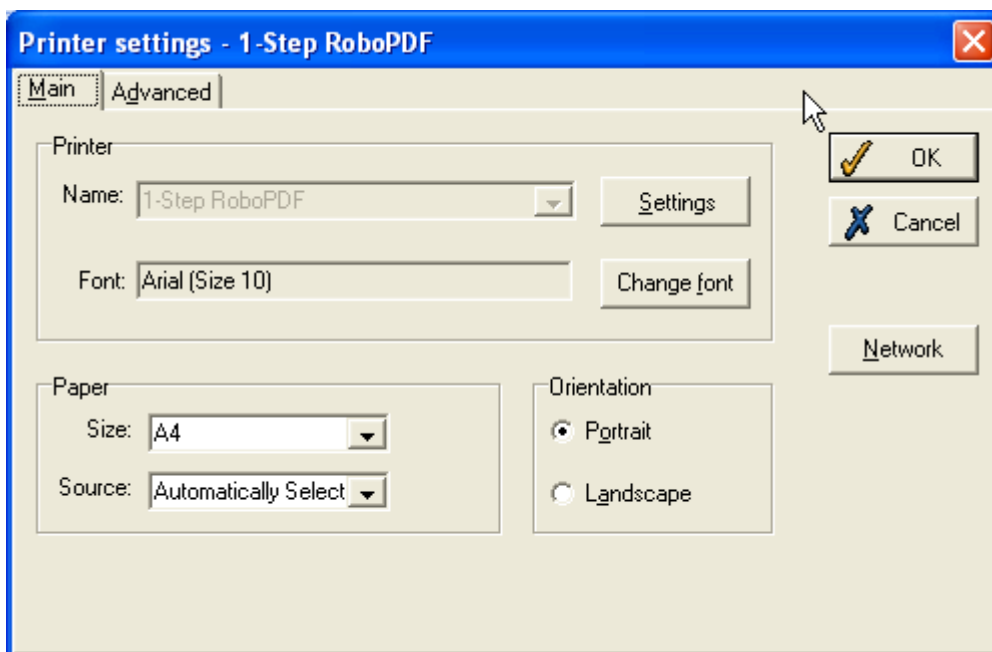
31.3.4 Printer setup

Before printing, you must ensure that the correct printer has been selected. To do this select **Printer Setup** from the **File** menu at the top of the main screen. A dialogue will be displayed allowing you to select the correct printer:



Click on the printer you wish to use, then click **Set as default** to select it.

To check the printer settings, click the **Modify** button to display this box:



See your system administrator if you require further advice on printer settings.

31.3.5 Options menu

The **Options** menu is accessible at the top of the Poller main screen. On accessing the menu, various options can be selected or de-selected. These include the option to start the Poller system tray monitor as an icon, to have it flash on any error, to have the Poller main screen display all transactions, and to have it display all transactions between Poller and the terminals. All of these can be ticked as on or off by clicking on them.

Also available from this menu is the option to set **Service Parameters**.

31.3.6 On site reports

The **Options** menu is accessible at the top of the Poller main screen. On accessing the menu, various options can be selected or de-selected. These include the option to start the Poller system tray monitor as an icon, to have it flash on any error, to have the Poller main screen display all transactions, and to have it display all transactions between Poller and the terminals. All of these can be ticked as on or off by clicking on them.

Also available from this menu is the option to set **Service Parameters**.

Error log

Errors are logged to mferrep.txt which is usually in the c:\windows\temp directory unless a different directory is specified in localcfg.

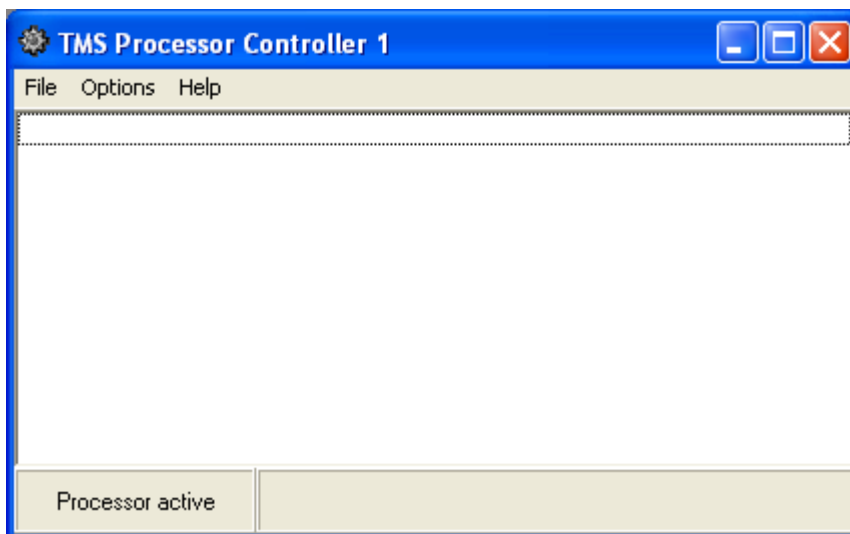
Custom calculations

Custom calculations (calcexec.exe) can be run from the processor to perform custom calculations.

31.4 Processor

31.4.1 Processor main form

Once you have successfully logged in, a screen similar to the following will be displayed:



The text at the top of the screen identifies which of the processor controllers you are running. The main field displays status messages regarding your processes.

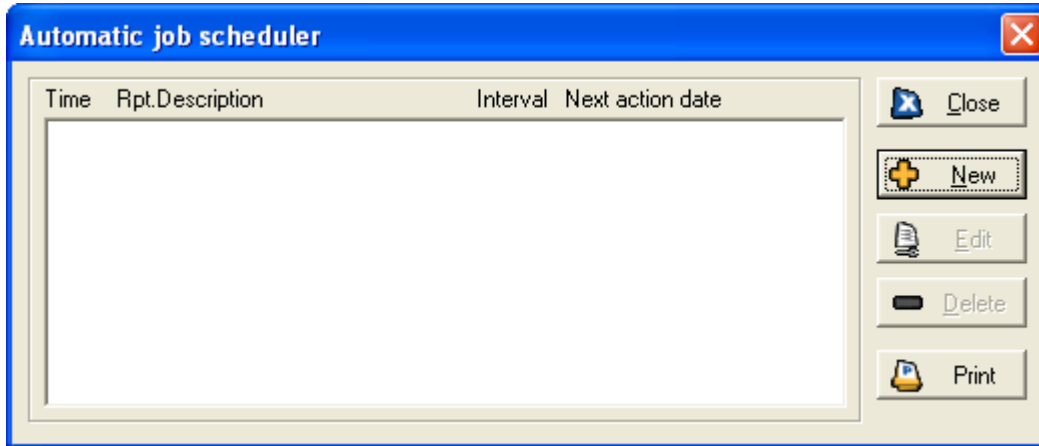
The pane in the bottom left indicates whether the processor is running, or whether it has been stopped.

Above the main form is a toolbar consisting of **File**, **Options** and **Help** menus. These will be covered below.

31.4.2 Automatic job scheduler

Automatic job scheduler processor

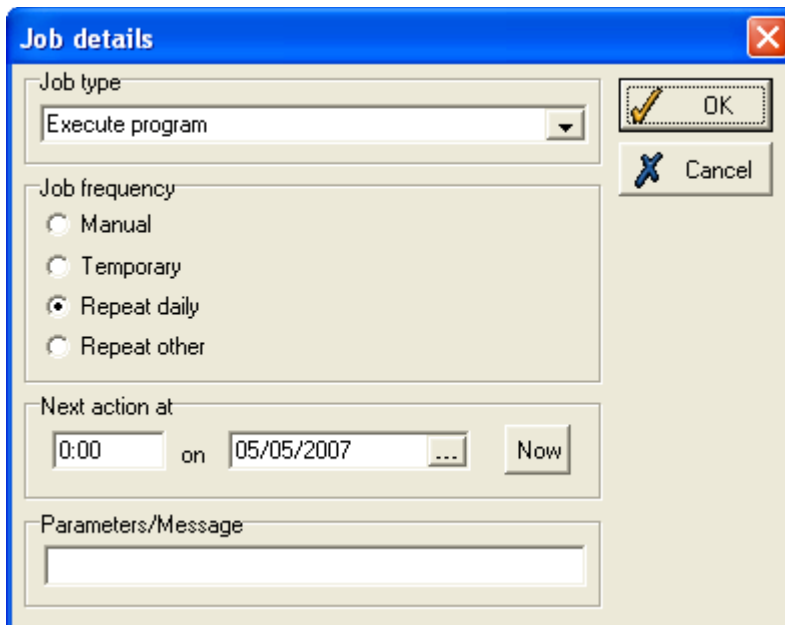
The automatic job scheduler is accessible via the **File** menu at the top of the main screen. Once it has been selected, a screen similar to the following will be displayed:



Commands already on this list can be edited or deleted by highlighting the required command and clicking on the **Edit** or **Delete** button on the right hand side. The **Print** button can be clicked to print out a copy of the current list of scheduled jobs.

Add new job

To add a new job to the automatic schedule, click the **New** button, displayed on the right hand side. The following screen will be displayed:



You may select jobs to be scheduled from the drop-down menu at the top of this window. The available job commands are covered in section 22 of this manual, on page 260.

Commands

A command is an instruction for the processing program to perform a particular task outside normal scheduled events, and can be issued at any time. A summary of all commands is as follows:

| No. | Command | Description |
|-----|--------------------------------|---|
| 1 | Process All Employees | Processor begins to process all employees whose shift has finished. |
| 2 | Catch Up Now | Begins all processing jobs currently in the job queue. |
| 3 | Apply Future Changes | Applies changes made for future processings. |
| 4 | Create Automatic Diary Entries | Creates diary entries from the processing data. |
| 5 | Run Special Calculations | Allows the processor to run any special calculations which have been set up. |
| 6 | Synchronise Flexipay | Synchronises the processor with Flexipay. |
| 7 | Synchronise TMS | Synchronises the processor with TMS. |
| 8 | Execute Program | The processor executes the program set currently in the job queue. |
| 9 | Send Processor Dormant | Stops the Processor for a specified amount of time to allow a backup of the TMS data to be done. |
| 10 | Stop Processor | Shuts down the Processor |
| 11 | Run Backup | Lets you run the backup processing program. |
| 12 | Check for escalations | Checks for employee requests and anomalies which have not been dealt with by the relevant supervisor. |

Job frequency

How often a job command will be performed can be accessed from the **Job Frequency** pane in the **Job Detail** window, accessible by clicking either the **New** or **Edit** buttons of the automatic job scheduler.

Job frequency

Manual

Temporary

Repeat daily

Repeat other

If **Repeat other** is selected, a box allows you to select the number of days between jobs. After selecting job frequency, enter the time and date when the command is to be executed in the **Next at** pane:

Next action at

0:00 on 19/07/2006 ... Now

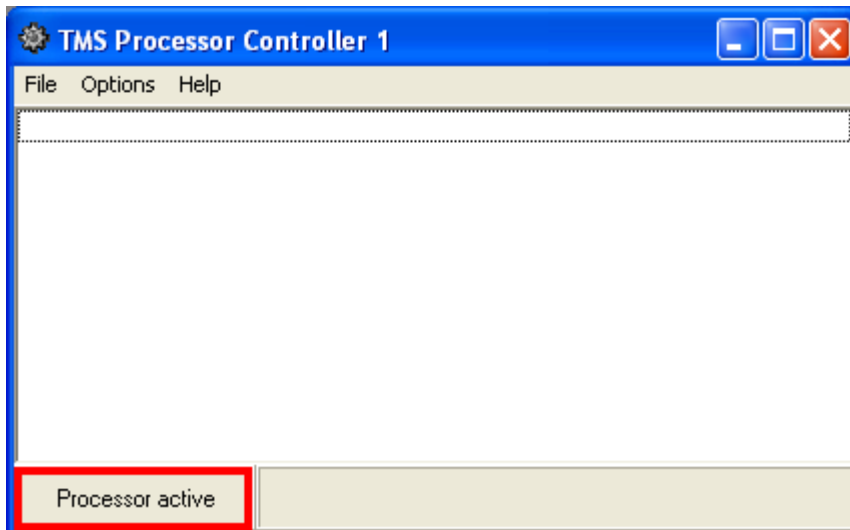
If **Repeat daily** or **Repeat other** were selected, this is the base date and time at which the repeated command will be performed. If **Manual** or **Temporary** were selected, you can click the **Now** box to put the command at the top of the current job list.

Issuing commands

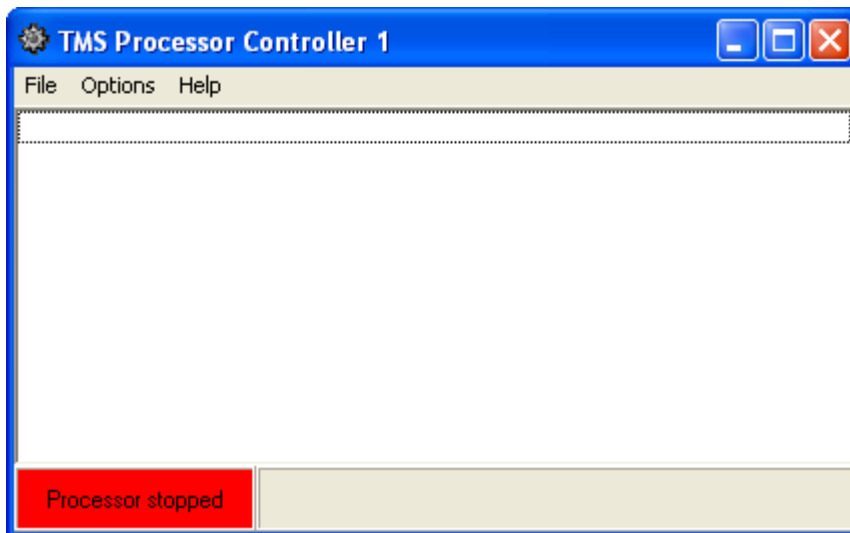
Click the **OK** button to issue a job, or the **Cancel** button to return to the main job scheduler window. If in need of assistance, click **Help** to be taken to the interactive help system for this program.

31.4.3 Start/Stop processor

The option to Start or Stop the Processor can be found in the **File** menu of the system tray monitor program. **Start Processor** starts the Poller if it is not already running; this is indicated by the status window in the bottom left of the screen. If the Processor is running, the message '**Processor Active**' will be displayed:

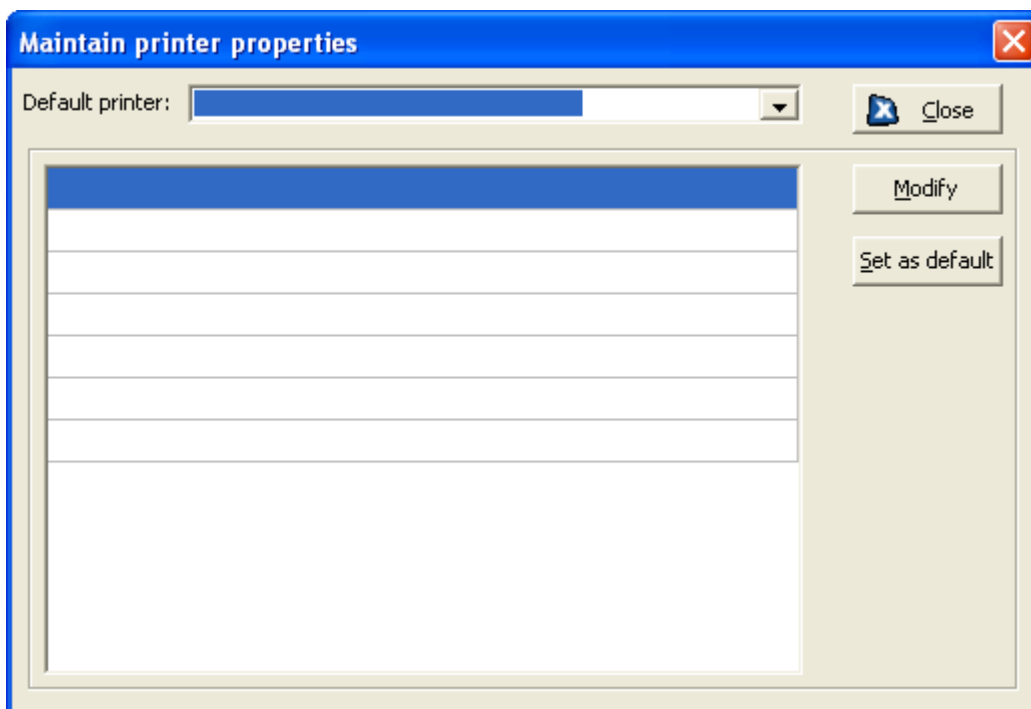


If you wish to temporarily stop the Processor, the **Stop Processor** command should be used. It is located in the **File** menu at the top of the main form. If Processor is not running, or if you have stopped Processor manually, **Processor Stopped** will be shown in the status window:



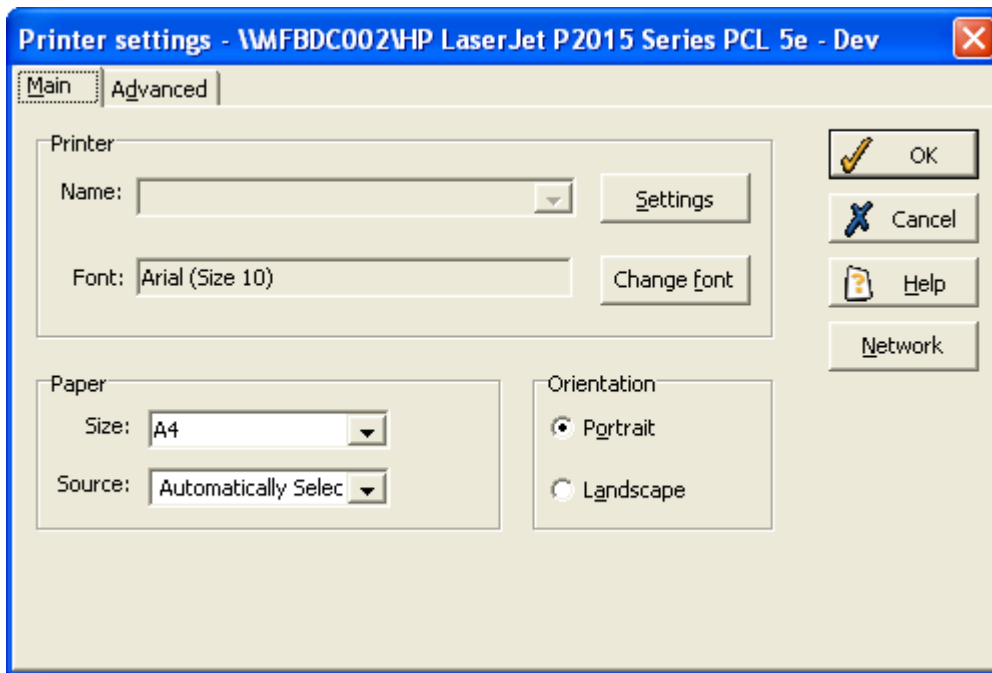
31.4.4 Printer setup

Before printing, you must ensure that the correct printer has been selected. To do this select **Printer Setup** from the **File** menu at the top of the main screen. A dialogue will be displayed allowing you to select the correct printer:



Click on the printer you wish to use, then click **Set as default** to select it.

To check the printer settings, click the **Modify** button to display this box:



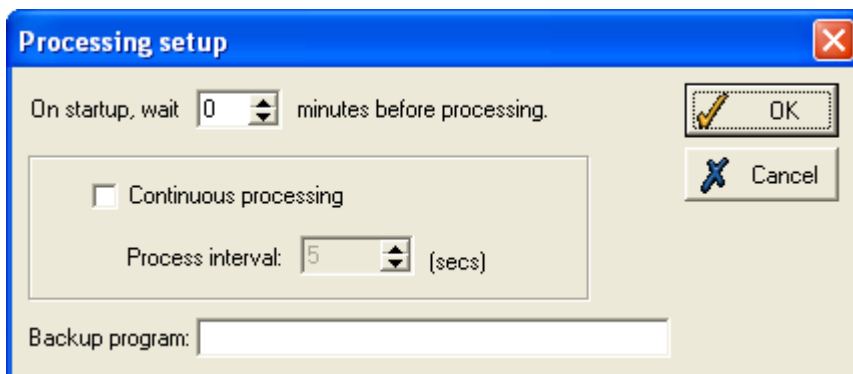
See your system administrator if you require further advice on printer settings.

31.4.5 Options menu

The **Options** menu is accessible at the top of the Processor main screen. It provides the option to start the Processor system tray as an icon. Also available from this menu is the option to set **Service Parameters**, and the option to set **Processor Parameters**, which will be covered in more detail below.

31.4.6 Processor setup

This pane, accessible via the **Options** menu, allows you to set how long after startup the program begins processing and whether or not that processing is continuous, as well as allowing you to specify the location of a backup program:



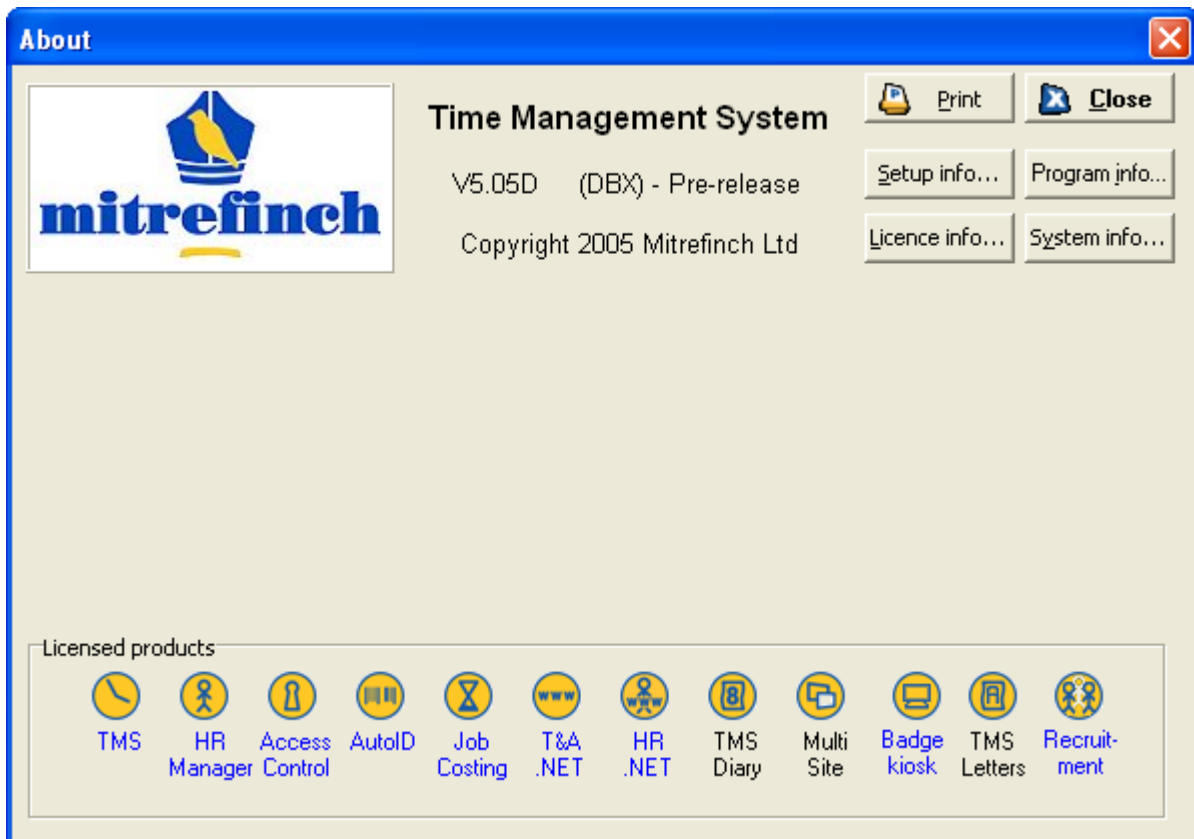
The first field allows you to set a time (in minutes) for the processor to wait before it begins to process data.

There is also a tick box which turns **Continuous processing** on or off. When ticked, this sets processing to occur at the interval (in seconds) specified in the **Process interval** field directly below.

The **Backup program** field allows you to specify the path of a backup program, in case the Processor should suffer difficulties.

31.6 Version help

To find out the Poller and Processor software version, select **About** from the **Help** menu on the toolbar at the top of the main screen. A screen similar to the following will be displayed:



The version number is displayed in the centre of the screen. The remaining buttons on this form can display detailed information about your system. They should only be used when providing information to your network administrator or Mitrefinch Technical Support.

Notice the program icons at the bottom of the form. If the lettering beneath the icon is coloured blue you can click on a hyperlink to open a corresponding page of our web-site.

32 Troubleshooting

32.1 Errors and error messages

There are three general types of error that may occur in TMS:

- **Input errors** (see page 364)
- **Processing errors** (see page 365)
- **Program errors** (see page 365)

You may also come across **Invalid parameter errors** (see page 365).

The following pages are intended as a brief introduction to the types of error that can occur when using TMS. Further details can be found in the TMS Systems Manual.

32.1.1 Input errors

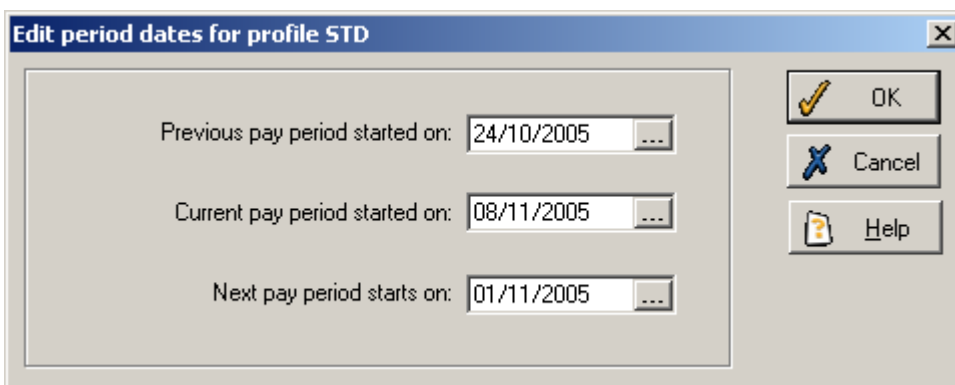
An input error can occur when the data item entered to TMS is not of the correct format or value. For example, trying to enter a date of 35/10/2005 will produce the error message:



Click **OK**, and then enter a valid date instead.

Some fields (including date fields) are checked for validity immediately when data is entered, while others are only checked when the **OK** button is clicked to close the form (i.e., when the data is ready for processing).

For example, when editing the start dates of pay periods for a group of employees, this example shows invalid dates:



The following error message will be displayed when the **OK** button is clicked:



Again click **OK**, and you must then enter valid dates before proceeding.

32.1.2 Processing errors

Processing errors can occur while the system is trying to perform a requested function with data which is incorrect (e.g., an invalid date). If the system detects a problem it will give an appropriate error message. For example, if you request a particular department range, you might see this message:

No employees in this grouping.

This could be because no employees have been assigned to this department range.

Before corrective action can be taken the cause of the error should be determined. If in doubt, contact Mitrefinch for assistance.

32.1.3 Program errors

A program error is one that causes TMS to stall due to unexpected events. Should such an error occur, three items of information will be shown on the screen:

- The program being used at the time.
- The point at which the error occurred within the program.
- The reason for the error.

For example:

```
Application Error
Exception EListError in
module WINTMS.EXE at 0049:0COB
List index out of bounds
OK
```

If a program error occurs, it is important that the cause be determined before any further action is taken. The error message should be noted and left on the screen. Contact Mitrefinch for further assistance.

32.2 Invalid parameter errors

In instances when the PC which is running the poller and/or the processor is encountering difficulties, Mitrefinch recommends that extra parameters are defined for the short cuts to the poller and/or processor. These will log any error into a file and restart the poller and/or processor program automatically. The advantage of this is that the program will be able to continue and the full error message, including the date and time, will be recorded.

In instances when an error log is not created during a poller and/or processor program problem, this indicates a difficulty with the resources on the PC. If this is the case, please call Mitrefinch help desk on 01904 69 39 49 for a troubleshooting guide.

To define extra parameters for the poller:

1. On the polling PC please close down the poller. Right-click on the short cut which you use to start the poller, and click on the Properties menu option. The Target field will contain a command similar to the following:

F:\wintms\poller.exe

2. Click on this field twice so that the writing is no longer highlighted. At the end of the poller.exe text type the following:

Ref=1 CloseOnError=Y RestartMins=3 Log=c:\mflog.txt Max-Log=100

Please note: the parameters above are case sensitive and that there are no spaces between the words, for example CloseOnError - type them in exactly as shown above.

3. If when you first access the command in the Target field (as in point 1.) you find that it contains a number after the .exe text, for example

F:\wintms\poller.exe 2

then please delete the number and change the Ref=1 part of the param-eters text (as in point 2.) to, for example, Ref=2.

4. After putting in these additional parameters, please click on OK or Save and then use the updated short cut to restart the poller

To define extra parameters for the processor:

1. On the processing PC please close down the processor. Right-click on the short cut which you use to start the processor, and click on the Properties menu option. The Target field will contain a command similar to the following:

F:\wintms\processor.exe

2. Click on this field twice so that the writing is no longer highlighted. At the end of the processor.exe text type the following:

Ref=1 CloseOnError=Y RestartMins=3 Log=c:\mfprlog.txt MaxLog=100

3. Please restart the processor using the updated short cut.

If you encounter the following when restarting the poller or processor:

Immediate 'restart in 3 mins'

then check that the parameters have been typed in correctly. If you have problems with this, please contact the help desk on 01904 69 39 49.

After putting in the parameters

Should the error recur, it will create one or both of the files c:\mflog.txt and c:\mfprlog.txt. The programs will restart themselves within three minutes of encountering a problem. If this is not the case, please call Mitrefinch help desk to request a troubleshooting guide so that changes to the PC can be made.

Please check periodically via Windows Explorer® to see whether mflog.txt or mfprlog.txt have been created. If they have, please double-click on the files, print them out and fax them to the help desk on 01904 693792, so that the cause of the problem can be identified.

Often, the cause of the invalid parameter error is temporary information which is being stored in the pdoxusr.lck file in the WinTMS folder when it would normally be stored on the C:\ drive of each PC. To store this information on the C:\ drive as expected:

1. Log everyone out of TMS and turn off the processor and poller.

2. Delete any pdoxurs.lck and pdoxurs.net files which exist in the WinTMS or Data directory.
3. On the polling PC, locate the file tms.ini in the c:\windows folder (or in the c:\winnt folder if you are running Windows NT®). Double-click on this file and it will open up in Notepad®.
4. Under the section titled LOCAL, type:

```
temppath=c:\windows\temp
```

 or, if you are running Windows NT®, type:

```
temppath=c:\winnt\temp
```
5. Click on the File menu and select Exit.
6. Check in Windows Explorer® that you have a folder c:\windows\temp
 (or c:\winnt\temp if you are running Windows NT®). If no such folder exists, please create one.
7. If you are running TMS in client/server mode (eg SQL, Oracle, Interbase), please go to the Start menu on the polling PC and select Programs/Mitrefinch/BDE Administration. Otherwise advance to 10.
8. Click on Configuration/Drivers/ and then the relevant server, eg SQL or Oracle. Click on INIT.
9. Make sure that the BLOB SIZE is at least 64. If you have many calculations to perform, you may wish to increase this to 100 or 120. Select the Save or Apply option from the File menu, then Exit the program.
10. Start up the poller and processor.

A file in c:\windows\temp\mfpd1 (created on the local PC) should then exist. The temporary information will then be stored in the temporary folder, preventing the invalid parameter error.

32.3 Frequently asked questions

1. When adding a clocking in the clock card, an error message appears.
 This means the clocking is outside the normal shift times, and is either too early or too late to be associated with the shift scheduled for that day.
 Either assign a different shift to the employee, by selecting one from the **Shift** column on the clock card, or create a new shift, specific to the employee on this day. Do this by clicking **Edit** in the clock card, then the **Edit** button in the work record form. Now alter the shift details so that the clocking is within the allowed limits of the shift. Then add the clocking.
2. A person has clocked earlier or later than normal and the clocking is not showing on the clock card, but is in the 'Unassigned clockings' box.
 Right click on the appropriate day in the clock card, and select **Recalculate day**.
 If this does not assign the clocking, click **Edit**, and then **Edit** again in the work record form. Ensure that the shift times encompass the clocking made. If not, either assign a different shift to the employee, or change the details of the shift so that the clocking is within the allowed limits.
3. When I used to select a different employee, the selected department used to change, but this no longer happens.
 To enable this feature, click on the **Selection options** icon, and tick the 'Synchronise group and employee' box.

4. How do I delete a day from the clock card?

A day must be blank before it can be deleted, so first remove all clockings and delete all worked and absence hours from the day. Right click on the blank day and select **Delete Day**.

5. How do I enter Bank Holidays or other absences for everyone?

From the **Mass change** menu, select **Planned absence for range**. Select the appropriate absence code, and enter the start and end dates of the absence. If required, tick the 'Make special day' box, and enter a code. Click **Apply**, and then select 'All' employees.

6. How do I change my password?

When logging in, enter your current details and then tick the **Change password** box. Before TMS starts, you will be prompted to enter and repeat a new password. This new password must be used the next time you log in.

7. How do I add a new hours code?

On the **System** menu, go to **Hours Categories** and select the type of hours for the new code (e.g., worked or absence hours). Click **Add**, enter the code to correspond to the category, and then define the details of the category.

8. How can I find out which terminal was used by an employee to clock in?

Open **Recent clockings**, and tick the **Extended view** box. The **Trm** column displays the number of the terminal where each clocking was made.

9. All the clockings made today are unassigned. When will they be processed?

Clockings are only processed after the shift is completed, including the latest the employee is entitled to work overtime and the allowed departure time. After this point the shift will be processed.

10. How do I add an unpaid section at the start of non-mandatory shifts?

On the **Work shift** form, select **Allowances**, and the **Allowed arrival time** box displays the period of time before the shift starts, during which an employee can clock in. Any clocking made in this period is treated as though it were made at the normal start-time, so any additional time is unpaid.

11. How do I change the database which is used by TMS?

In **Local configuration**, open the **Advanced** section and alter the server name and database name to that of the new database. The user name and password may also require changing.

12. Why does one PC not show captions underneath the icons on the toolbars, when others do?

Captions can be enabled or disabled. Select **Maintain Preferences** from the **System** menu, open the **Interface** panel and tick or clear the **Show Captions** box.

13. New badges are being rejected.

Check the poller is running and is connected to the clocks. If the badges are still rejected, download the employees to the terminals.

14. I have forgotten the MASTER password.

Call Support on 01904 693949 and we will talk you through how to decode the password. You will be required to send us confirmation of your identity and your position at the company.

15. How do I add a report to the Reports menu?

First, log in to **Configure Tools_Reports**.

Select the **Reports** tab, then click **Add**. Click **Browse**, and select the required report from the drop-down list. Enter a title to identify the report, then click **OK**. Click **OK** again to exit the main **Reports** panel.

Restart WinTMS and the report will appear on the menu. For the report to appear for other users, user rights may need to be altered.

16. Keyed absences no longer appear in the clock card after an upgrade.

From the **System** menu, open **Maintain preferences** and select the **Absence** tab. Ensure 'Allow keyed absence' is ticked and the required absence type is entered in the 'Absence code for keyed absence' box.

17. My new licence number does not work.

Make sure the company name EXACTLY matches the one that has been given to you. If the licence number still does not work, please call Support on 01904 693949.

18. After changing the server, the server name or the IP address, I can no longer access the system.

Open **Local configuration** and make sure that all the settings, including those in the **Advanced** section, match the new setup.

19. Leavers and new starters are not on the Future Work Planner for the times when they should be.

Make sure the **Employee details** form shows their correct start and leave dates. If these dates are correct, but the leavers and future starters are still not shown, upgrade to the latest version of WinTMS.

20. How can I add a new code to an existing drop down list?

Select **Maintain codes** from the **System** menu. Select the relevant code from the list and then click **Modify**. Enter the new code, with a description, at the bottom of the list.

21. How do I restrict the access of employees, so that they can only make clockings at certain terminals?

On the **System** menu, select **Maintain access groups**. If any access groups have already been established, they will be displayed here.

To set up a new access group, click **Add**. Then select the terminals that will be available to this access group, as well as the times when those terminals can be used.

When the access group has been set up, assign the relevant employees to it, by opening the **Employee details** form for each employee, and selecting the access group from the drop-down list.

Download the employees to the terminals, and then open the poller and download the time zones.

22. The date is in the American format (i.e., MM/DD/YYYY).

This results from settings outside TMS, which has no date settings except in the reporting tools.

Open the **Start** menu, and from **Settings** select **Control Panel** then load **Regional Options**. Make sure the format is set to English (UK), and that the Set Default is also English (UK). On some versions of Windows, ensure that the non-Unicode language is set to English (UK) as well.

23. How can I change an employee's number, rather than the badge number?

It is very rare that the employee number needs to be changed. However, to do so, select **Change number** from the **Employee** menu. Read the prompt that appears, and confirm the action. Then enter the new number and click **OK**.

24. Can I retrieve the records of an employee who has been deleted from the system?

The only way to recover this information is to restore from a backup made before the employee was deleted.

25. A booked absence has not appeared on the employee's clock card, after the date it was taken.

This means the employee was not scheduled to work that day anyway, so no absence hours are recorded.

26. An employee takes the whole day off, but was only scheduled to work a short shift anyway. Is it possible to record the absence as only half a day's holiday?

Add a new hours code, by opening the **System** menu, selecting **Hours categories**, and then clicking **Absence hours**. Name the code 'Half holiday' or something similar.

Then select **Entitlements** from the **System** menu, and, on the 'Holiday' panel, click **Set codes**. Add the half-holiday code, with a multiplier of 0.5.

Apply this code to the absence day, and only half a day will be taken from the employee's holiday entitlements.

27. How do I download a single employee to the terminals?

From the **Employee** menu, select **Download current employee**.

28. How do I change a 'Pending' absence to 'Holiday' or another absence type?

Use either the employee's clock card or the **Unchecked anomalies** form. Change the entry in the **Abs Code** column to 'Holiday' or the appropriate code.

29. I do not have access to all the menu options that other users have.

Ask the person who uses the MASTER user name to alter your user rights so that you can access all the options you need.

30. On the absence profile, letters are no longer shown for the different absence types.

Right click anywhere within the profile, and select **Show absence letters** from the menu that appears. As well as on the profile itself, the letters will now also display on the key in the top left corner.

31. The terminal is only reading cards intermittently.

This fault is possibly caused by a dusty environment. Clean the reader by swiping a cloth-covered card through it.

32. Does my licence include leavers?

Leavers are included on licences for version 3. On versions 4 and above these employees do not count towards your licence.

33. Can I change whether absence periods continue or stop over the weekend?

The system can be set up so that, for example, a two-week absence period either includes or excludes the weekend in the middle.

To alter this setting, open the **System** menu, select **Maintain preferences**, and click the **Absence** tab. Change the value for the 'Maximum number of non-working days gap in a continuous absence period'. Enter '2' to allow absence periods to continue over a weekend, or '0' to create two separate absence periods.

34. How do I alter the caption used for a field on a form?

Load **Database Definition** (DBDEF) and select **Maintain tables**. Select the relevant table and click **Modify**. You can then change the entry in the **Caption** column for the required field. Restart TMS, and the modified caption will appear.

35. Other programs, such as the Onsite/absence list or Reports, do not load at all when selected in WinTMS.

Ensure that WinTMS was opened from the WinTMS folder and that the required programs are in the same folder.

36. How do I change a door's description?

In the **Site planner**, open the **Setup** menu, go to **Door Control** and select **Door Maintenance**. Select the required door and modify the description.

37. How can I view the value of an employee's TOIL or other entitlement?

From the **Employee** menu, open **Entitlements** and click on the relevant tab. All information should be displayed.

38. I followed the instructions for changing the clocks to BST or GMT but the clocks did not change.

The version of Windows you are running is too early. You should upgrade to at least Win98 Service Pack 2.

39. No clockings are coming through for anyone.

Check that the poller is running. To do this you must use the polling PC. The polling program will normally be minimised at the bottom of the screen. If not, open it by clicking on the **Poll clocks** icon, or select **Start > Programs > Mitrefinch > Poll Clocks**. This opens the poller, which will correct the problem.

40. How do I change what the terminal shows as its Idle Message, or Company Name?

Open **Terminal configuration** and, from the **Configuration** menu, select **Terminal messages**. Alter the **Idle message**, and then save the configuration.

Now open the poller and select **Job scheduler** from the **File** menu. Here you should choose to perform a **New** task, and select **Configure** from the list of **Job types**. Ensure the required terminals are selected, and choose the time for the task to run, when the message will be updated.

41. Why do all employees have clockings in the 'Unassigned clockings' box on the clock card?

This means that the processor is not running, and must be started. (As it is important to run only one processor, the following solution should only be performed on the designated processing machine.) Start the processor by selecting **Start > Programs > Mitrefinch > Processor**. To process the days that ought to have clockings already, open the **File** menu and click **Catch up now**.

42. Some employees are missing from TMS. When I try to add them again the system says that the number is already in use.

Log in to TMS as the MASTER user (ask the system administrator if necessary), and check that the employees can be seen now. If so, this problem was caused by your user rights.

These can be altered to allow access to all relevant employees. To change user rights, open **Maintain users** from the **System** menu. Click the **Users** icon, select the username and click **Modify**. Select **Employee access** and then choose which departments, or other groups, can be accessed. Click **OK** and the next time you log in with that username you should be able to access the missing employees.

43. I have performed a fire alarm test and now all the doors are open. How can I close them?

Open the **Site Monitor** and right click on a PC. Then go to **Add command > Door control**. Select **Close** and tick **All doors in list**, then click **OK**. This must be repeated for each PC in the Site Monitor. It is also important to ensure that the poller is still running.

44. How can I set an absence to count as worked hours for the EWTD?

Open **Maintain Preferences** from the **System** menu and select the **Misc** tab. Click the **Worked absences** button and then move any absence categories to count as worked absences to the **Selected** box.

45. A message tells me the system has not been used for many days, even though it has been.

One of the PCs used to log in to WinTMS is in the wrong date format (i.e. MM/DD/YYYY). You should ensure that all computers use the same date format. This ought to stop the message appearing again.

46. I get a message, 'No Access to this Option', when opening a report or another program.

Log in to TMS as the MASTER user, and open **Maintain users** from the **System** menu. Either a) change to another user profile, by opening **Users**, selecting the username, clicking **Modify** and changing the **Profile**, or b) amend the rights of your profile, by opening **Profiles**, selecting your current profile and clicking **Modify**, then changing the rights to allow access to the required menu and program.

47. My windows appear in the wrong size or the wrong place on screen, so I cannot see all the information.

Delete **MFFORMS.ini** from your Windows directory. This will reset all panels to their default settings.

48. An error message tells me 'No Default Printer Currently Selected'.

From the **Start** menu, go to **Settings** and select **Printers and Faxes**. Check in this folder that a printer is selected. Also make sure that its name is less than 40 characters long.

49. The clocks are showing the incorrect time.

First, make sure the polling PC has the correct time. Then open the **Poller**, open the **File** menu and select **Job scheduler**. Add a **New** task and select **Synchronize clocks**. Select

Now to perform the task immediately.

50. The RESET button is flashing on the poller, but everything appears to be working.

Open the **Site Monitor** and check the **Current Events** pop-up box. This should show the problem that caused the reset. Simply click the **RESET** button to remove the message.

51. I get a message, 'Unable to add clocking to checked work record'.

The clockings have probably appeared late due to either the terminal being damaged or the poller being inactive. The message means that the day's work record has already been manually checked off, prior to the clocking being added to the work record, so any new clockings will be ignored.

52. I have restored from a backup and clockings are missing from the days after the backup.

Open the **Poller** and go to **File > Job Scheduler**. Add a **New** job of **Recover clockings**, set the frequency to **Temporary** and press **Now**. Enter in the **Recover from** box the date and time of the backup, and then press **OK**. After a few minutes the clockings should begin to reappear.

When the poller ceases to return new clockings, open the **Processor** and select **File > Catch up now**.

53. An error message states, 'Nested transactions not supported'.

Go to **Start > Programs > Mitrefinch TMS > Rebuild Database**. From here, open the **File** menu and select **Build indexes**. Then select **All**, and all indexes will be created.

If this is completed successfully, the error should no longer appear. If any indexes fail, make a note of which and continue with the rest of the rebuild, then call Support on 01904 693949 with details of which indexes fail.

54. Can I change the time the door locks in the evenings?

Open the **Site planner**, right click on the required door and select **Details**. Note the **Global time zone**.

Now, in TMS, open the **System** menu and from **Maintain time zones** select **Weekly**. **Modify** the zone noted above and click the **Daily zones** button. Now change the details of the appropriate daily time zone to match the time required (you may also wish to edit its description).

Then open the **Poller** and add a new task, to **Download timezones**.

55. My holiday dates for the new year are incorrect by one day.

Simply change the dates to the correct ones by opening **Entitlements** from the **System** menu. This may have been caused by a bug - please download the latest version of TMS.

56. The terminal is set to 'Uncontrolled' but still rejects swipes.

'Uncontrolled' means that the terminal does not require swipes as the door should already be open.

57. After an upgrade, no Terminal Message is shown, or an incorrect message is displayed.

In the **Site planner**, open the **Setup** menu and select **Terminal parameters**. In the **Terminal Messages** section, completely clear the **Format**. Then, in TMS, download employee details.

58. In calculated terminal messages, what does the 1, 2 or 3 mean?

This is the type of employee message shown. For details, go to **Start > Programs > Mitrefinch TMS > Terminal configuration**. Then open the **Configuration** menu and select **Employee messages**.

59. Users have the Export menu option but they still cannot export reports?

In TMS, go to **System > Maintain users**, and select **Profiles. Modify** the relevant profile, and tick the **Export capability** box.

60. Does a downsize remove the data from the SQL or merely copy it?

It creates a copy in the Data folder and leaves the original tables as they were.

61. Clockings are not showing on the poller but do appear in WinTMS.

Within the poller, open the **Options** menu and select **Display all transactions**.

62. A message says 'Lock Error Setting Lock' when I attempt to run the poller or processor.

Exit all TMS applications and delete **TMSLOCK.PDF** from the data directory. If the problem still persists it is probably due to another program crashing regularly.

63. The bells are not ringing at the correct times.

Open **Terminal configuration**, and from the **Configuration** menu select **Bell circuits**. Click **Edit** and you are then able to enter the correct times for each day when the bell should ring. Now **Reconfigure** the terminal, and the bells should ring at the times set.

64. Parts of the display cannot be seen.

Use **Display Properties** (a Windows setting), to make sure that the system is set to use **Small Fonts**.

65. An employee is working the wrong rotation or day of the roster but the roster looks correct.

Delete all future changes entered for the roster and **Redo the Processing** for this employee.

66. How do I edit a terminal's configuration file and reconfigure the clock?

Open the **Site Planner**, right click on the required clocking terminal and select **Details**. Then click the **Edit** button to open the **Terminal configuration**, where you can make the necessary changes and save the configuration.

Now load the **Site monitor**, right click on the clock and select **Add command > Configure**.

67. The clockings made by an employee are showing as 'Unassigned' - however, I can add shifts for them without a problem.

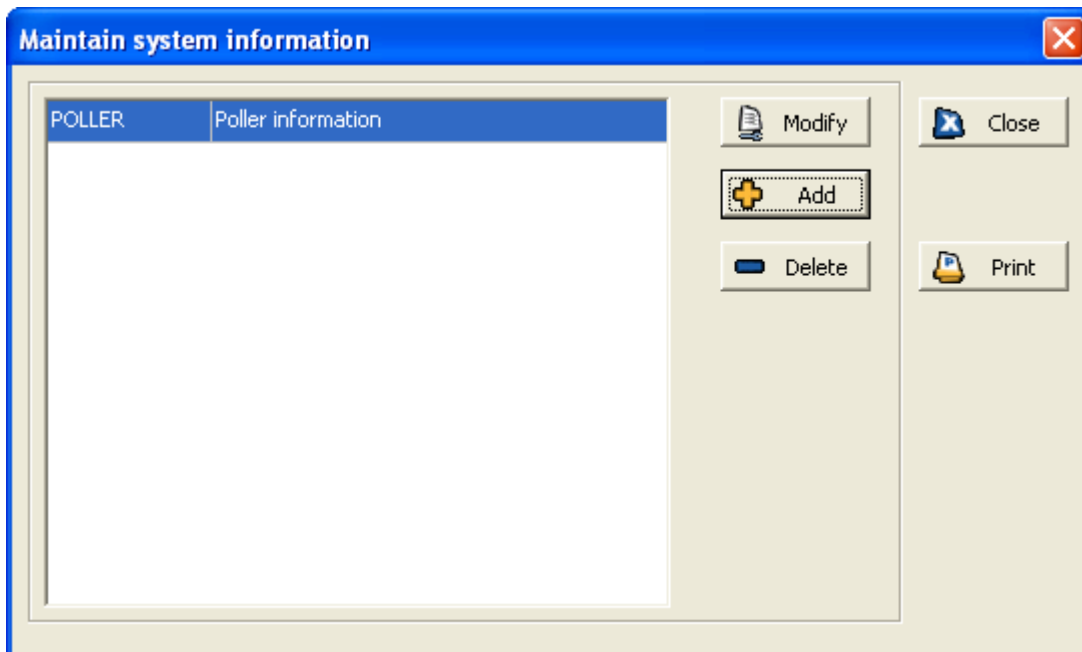
Make sure that the employee's **Process From** date is in the past. This may need adding to an employee display view.

32.4 System information

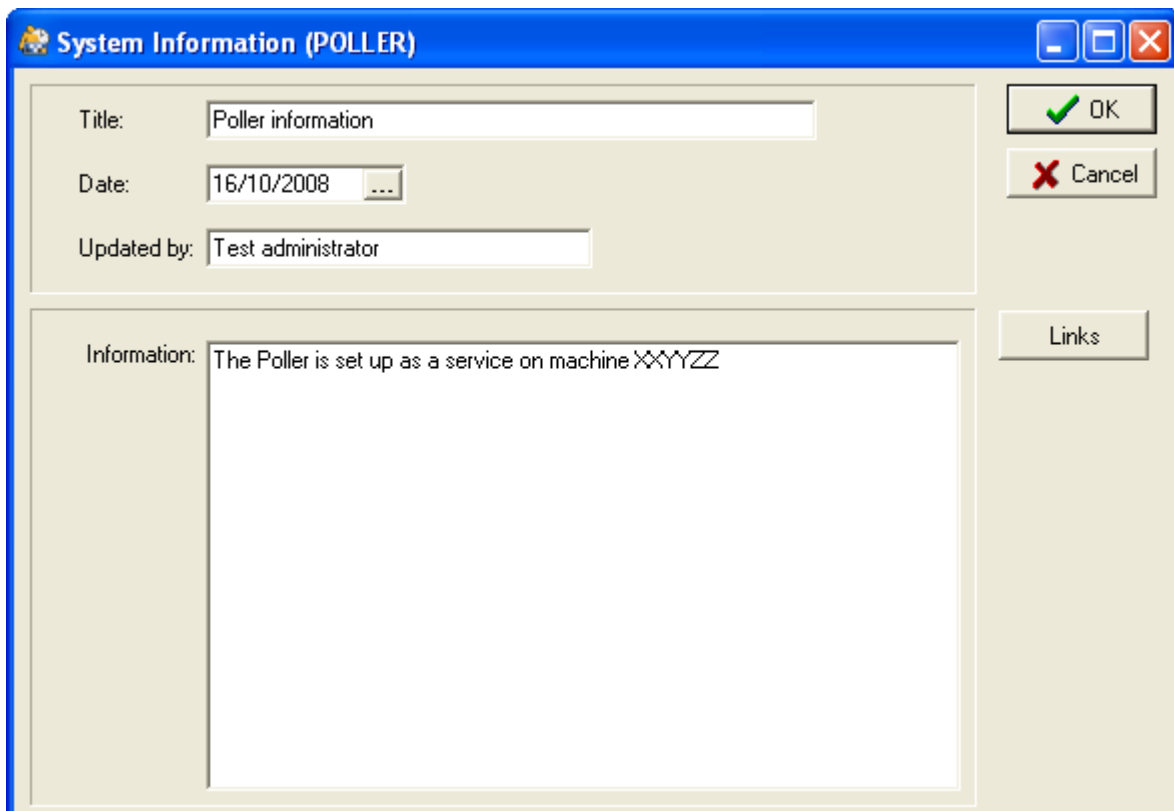
Often, a **TMS** system is setup in a very specific way or work is undertaken on a system by administrators, whilst an issue is being resolved. Unfortunately, other personnel are not always aware of this information so cannot understand how something works or has been setup.

This option allows information to be stored in a central and easily accessible location which can be accessed by any user with access to the relevant menu option.

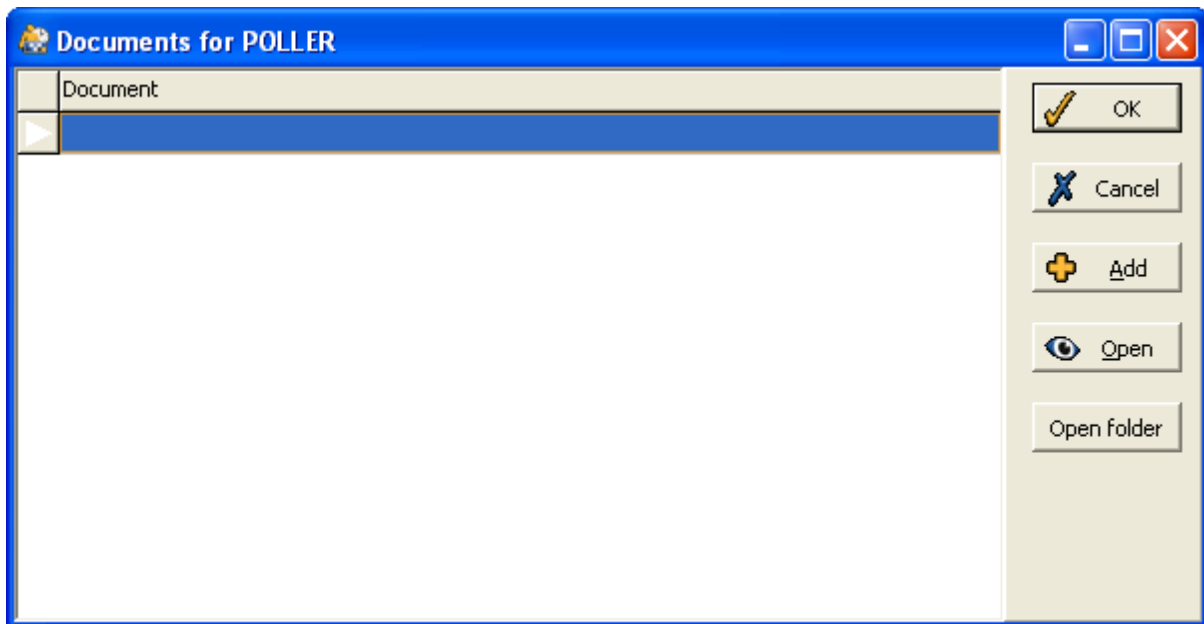
Select the **System** menu and then select **System information** to open the following form:



The list above contains all system information that has been stored by administrators and others who have worked on the **TMS** system. To view the information, select it from the list and then click the **Modify** button. A form similar to the following will then be displayed:



This form contains the date and author of the information update, along with relevant details in the **Information** box. Click the **Links** button to display a form similar to the following:



This form can be used to store documents relating to the system information. Use the **Add** button to link a document accordingly.

Index

A

Absence

| | |
|--------------------------|---------|
| absence profile..... | 62, 129 |
| absence statistics | 130 |
| authorise requests | 61 |
| general absences | 133 |
| onsite/absent list | 65 |
| planned absence | |
| errors | 135 |
| for individual | 125 |
| for range | 131 |

| | |
|--------------------|----|
| Access group | 51 |
|--------------------|----|

| | |
|---------------------|-----|
| Access rights | 279 |
|---------------------|-----|

| | |
|-----------------------|----|
| Add an employee | 45 |
|-----------------------|----|

| | |
|----------------|-----|
| Anomalies..... | 110 |
|----------------|-----|

| | |
|--------------------------------|----------|
| anomaly report..... | 250 |
| current shift anomalies..... | 122 |
| daily anomaly correction | 110 |
| unchecked anomalies | 111 |
| edit..... | 113, 115 |

| | |
|---------------------|-----|
| Approve hours | 136 |
|---------------------|-----|

| | |
|-------------|-----|
| Areas | 192 |
|-------------|-----|

| | |
|--------------------|-----|
| Assign views | 333 |
|--------------------|-----|

| | |
|-------------------|-----|
| Audit trail | 325 |
|-------------------|-----|

| | |
|-------------------------|----|
| Authorisation list..... | 61 |
|-------------------------|----|

Authorise

| | |
|----------------|----------|
| anomalies..... | 115, 121 |
| overtime | 174 |

| | |
|----------------|----|
| requests | 61 |
|----------------|----|

| | |
|------------------------------|----------|
| Automatic job scheduler..... | 260, 351 |
|------------------------------|----------|

B

Badge

| | |
|--------------------------|----|
| badge history | 87 |
| badge list | 86 |
| badge number | 85 |
| temporary badges..... | 87 |
| visitor badge types..... | 93 |
| visitor badges | 90 |

| | |
|------------------|-----|
| BK Manager | 318 |
|------------------|-----|

| | |
|------------------|-----|
| logging on | 318 |
|------------------|-----|

| | |
|----------------|-----|
| main form..... | 319 |
|----------------|-----|

| | |
|-------------------|----------|
| BST changes | 252, 253 |
|-------------------|----------|

C

| | |
|--------------------|-----|
| Calculations | 226 |
|--------------------|-----|

| | |
|----------------|----|
| Calendar | 31 |
|----------------|----|

Change

| | |
|-----------------------|---------|
| badge number | 85 |
| employee number | 55 |
| employee type | 56 |
| password | 43 |
| planned shifts | 47, 160 |

Clock card

| | |
|------------------------------|-----|
| authorise amendments | 61 |
| edit..... | 112 |
| overtime reconciliation..... | 153 |
| view..... | 120 |

| | | | |
|-----------------------------------|----------|-------------------------------|----------|
| Clocking terminals..... | 255 | anomalies | 113, 115 |
| attaching fingerprint reader..... | 263 | clock card..... | 112 |
| errors..... | 256, 261 | employee details..... | 49 |
| modems | 262 | employee's flex balance | 56 |
| Clockings | | entitlements | 52 |
| adjust times..... | 253 | shifts | 174 |
| maintain | 112 | Email | |
| recent clockings | 47 | letters | 143 |
| Codes | 37 | report | 249 |
| Commands..... | 258 | synchronize diary..... | 148 |
| command list..... | 260 | Employee | |
| issue a command..... | 259 | add..... | 45 |
| Contract..... | 50 | change number..... | 55 |
| Current shift anomalies | 122 | change type | 56 |
| Custom toolbar | 21 | employee details..... | 49 |
| D | | find | 23 |
| Dates | | leaving | 57 |
| period end | 150 | picture | 54 |
| select..... | 31 | restart..... | 45 |
| Department | | select | 22 |
| select..... | 24 | selection..... | 25 |
| Diary | | views..... | 294, 300 |
| delete entries | 149 | web profiles | 283 |
| maintain | 146 | Enrol fingerprints..... | 263 |
| Display reports | 248 | Entitlements | |
| Download all employees | 81 | edit | 106 |
| Download current employee | 85 | view..... | 106 |
| Drop-down lists | 32 | year end procedure | 107 |
| E | | Errors and error messages | |
| Edit | | general..... | 364 |

| | | | |
|----------------------------------|----------|-----------------------------|--------------|
| invalid parameter | 365 | G | |
| planned absence | 135 | GMT changes | 252, 253 |
| terminals | 261 | Graph | 170 |
| Escalation | | Grid output | |
| escalation history | 315 | Group | |
| introduction | 312 | group absence profile | 62 |
| of employee requests | 312 | select | 24 |
| of work record anomalies..... | 313 | Group rules | 266, 284 |
| set up | 312 | H | |
| view escalations..... | 315 | Hours | |
| Event planner | 191 | categories | 95 |
| headings | 293, 214 | I | |
| options | 204 | Individual rules | 184 |
| Events | 191 | J | |
| event data | 201 | Job Costing | 302 |
| maintain events..... | 191 | L | |
| staff allocation..... | 199 | Leaver | 57 |
| EWTD | 272 | Letters | 141 |
| Export a report | 245 | email | 143 |
| F | | point in time | 145 |
| Files | 53 | print..... | 141 |
| Fingerprints | | Log in | 19, 318, 335 |
| enrol..... | 263 | M | |
| Flex balance | 56 | Main form | 319 |
| Flextime | 223 | Maintain | |
| edit flex balance | 56 | clocking..... | 112, 175 |
| flextime work rule | 223 | codes | 37 |
| Future Work Planner | 154 | diary | 146 |
| set up shifts..... | 161 | employee details..... | 49 |
| | | shifts | 211 |

| | | | |
|----------------------------------|--------------|---------------------------------------|--------------|
| temporary badges | 87 | shifts | |
| visitor badges | 90 | change..... | 47, 160, 179 |
| Mass change | 73, 76 | planned shift change for range..... | 80 |
| Messages | | tas clockings for range..... | 84 |
| send message to employees | 82 | Point in time view | |
| view | 58 | letters | 145 |
| Miscellaneous | 253 | reports..... | 250 |
| Modems..... | 262 | Poller | |
| O | | general system use | 349 |
| Onsite/absent list..... | 65 | installation..... | 346 |
| Outstanding anomalies form | 112 | main form..... | 350 |
| Overtime | | start/stop..... | 354 |
| authorised overtime | 174 | Print | |
| reconciliation | 153 | letters | 141 |
| P | | report | 248 |
| Package links | 58 | Processing | 268 |
| Password | | messages and warnings..... | 270 |
| change | 43 | start the processing | 268 |
| default | 19, 318, 334 | Processor | |
| Pay period | 150 | installation..... | 346 |
| PDF report..... | 249 | main form..... | 357 |
| Period ends | 150 | start/stop..... | 360 |
| Personal details..... | 49 | Projects | |
| Picture | 54 | project tracking | 310 |
| Planned | | R | |
| absence | | Range of employees | 28 |
| errors | 135 | Real time view..... | 302 |
| for individual | 125 | Recalculate work records | 71 |
| for range | 131 | Recent clockings..... | 47 |
| overtime | 174 | Re-do current period processing | 70 |

| | | | |
|--------------------------------------|--------------|----------------------------|----------|
| Re-do period processing | 71 | work shift form | 212 |
| Repeat planned absence | 127 | Site code | 51 |
| Reports | | Site monitor | |
| anomaly report | 250 | identify problems | 256 |
| pre-defined reports | 245 | Skills | |
| run a report | 245 | onsite/absent list | 65 |
| Requests | 61 | rules | 239 |
| Restart an employee | 45 | skills matrix | 68 |
| Roster | 82, 180, 227 | Staffing rules | 239 |
| Rules | | Start the processing | 368 |
| display | 283 | Sub-events | |
| individual rules | 184 | allocate staff | 199 |
| introduction | 283 | set up | 192 |
| staffing | 239 | templates | 202 |
| S | | Summary list | 69 |
| Security | 273 | Synchronise clocks | 252 |
| Select | | System | |
| available items | 31 | structure | 14 |
| date | 31 | System information | 374 |
| employee | 22 | T | |
| group | 24 | TAS | |
| range | 28 | maintain clockings | 112 |
| Selection options | 24 | TAS now | |
| Send message to employees | 81 | Temporary badges | 87 |
| Shift | | Terminals | 255 |
| authorise requests | 61 | errors | 256, 261 |
| change worked shifts | 112, 174 | issue commands | 259 |
| planned shift change for range | 80 | modems | 262 |
| planned shift changes | 47 | Totals | 165 |
| set up shifts | 211 | Touchscreen | |

| | | | |
|--|--------------|--|---------|
| car registration | 340 | entitlements | 106 |
| set up | 330 | View Poll/Process log | 270 |
| title page | 334 | Views..... | 294 |
| use | 333 | Visitor badges | |
| U | | maintain | 90 |
| Unchecked anomalies..... | 111 | types | 93 |
| edit on Outstanding Anomalies form | 112 | Visitor management..... | 318 |
| edit on Work Record form..... | 115 | W | |
| Update details | 39 | Work record | |
| User | | clock card..... | 120 |
| profiles | 273 | edit on Outstanding Anomalies form | 112 |
| views | 298, 300 | edit on Work Record form..... | 115 |
| User defined toolbar | 21 | Work shift form..... | 212 |
| User name default..... | 19, 318, 334 | Working time regulations | 50, 272 |
| V | | Y | |
| View | | Year end procedure | 107 |
| clock card..... | 120 | | |