InfoTime

User Guide

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How to Install InfoTime

Extract all the files in Setup.zip to a folder on your PC. Once the extraction has finished, browse to the location of the files and run the application Install.exe (this must be run as an administrator).

The installation splash screen will load (Fig 1).

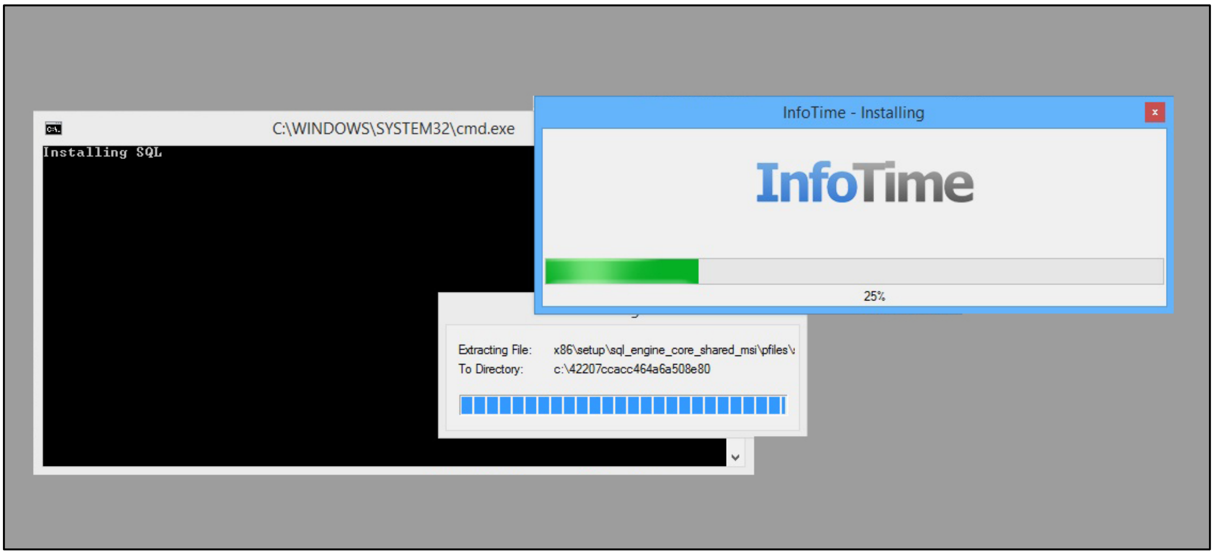


Fig 1

The installation routine will begin by making sure that all installation requirements for InfoTime are already installed on your computer. These are MS SQL, Microsoft Dot Net Framework 4 and Windows IIS Web Server. If these are not installed on the computer then they will be installed automatically by the setup routine and configured for use with InfoTime

Once this is completed the installation routine for the user interface will start. Click Next on the first screen (Fig 2).

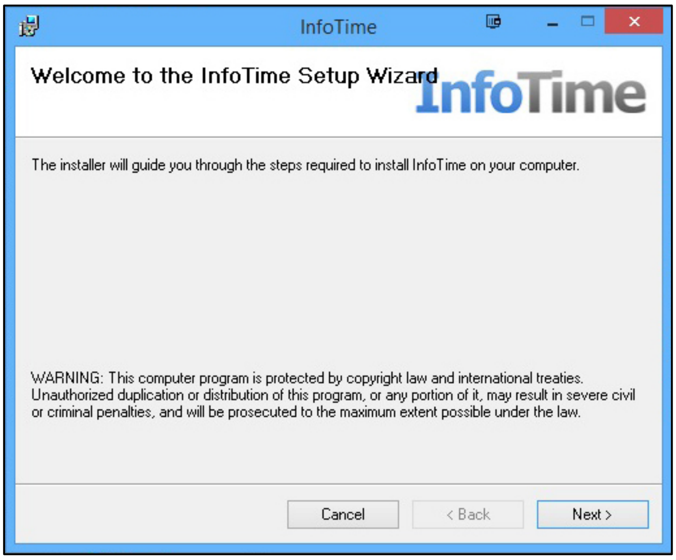


Fig 2

The next screen will ask for details of the Virtual Folder to install InfoTime in along with the application pool to use (Fig 3).

- The Virtual Folder will set the address used to access the software via the web browser after installation has finish. It is suggested you set this to InfoTime.

- The Application Pool can be selected from the dropdown list. The name will depend on the version of Windows and Dot Net Framework installed on your PC, on Windows 8 this will be ".Net V4.5 Classic". On earlier versions of Windows it could be ".Net V4.5 Classic" or "ASP.NET V4.0 Classic". It should always be set to use the Classic style of .Net 4.

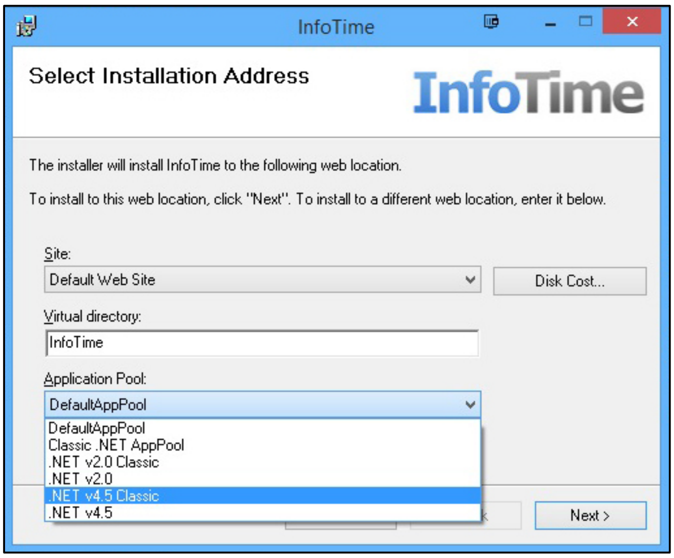


Fig 3

Once you have set these details, click Next to proceed. Then accept the licence details and click Next.

You will then be asked to confirm you wish to install InfoTime, click Next again. The next screen will ask for connection details for your SQL Server. The default values for the SQL server as installed earlier in this setup routine are:

Database Server:	localhost\infotime
Database Name:	InfoTime
Username:	sa
Password	ClockingSystems123

Please enter these details in the corresponding boxes (Fig 4)

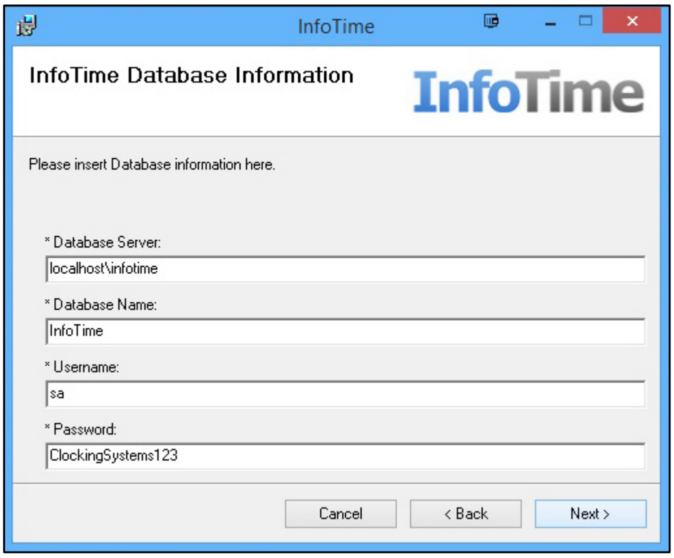


Fig 4

Once the details are entered, click Next. On the next screen the system will ask for local domain user details (Fig 5), these only need to be entered if the SQL in use is not using a SQL username. If the default instance of SQL is being used then these details do not need to be entered.

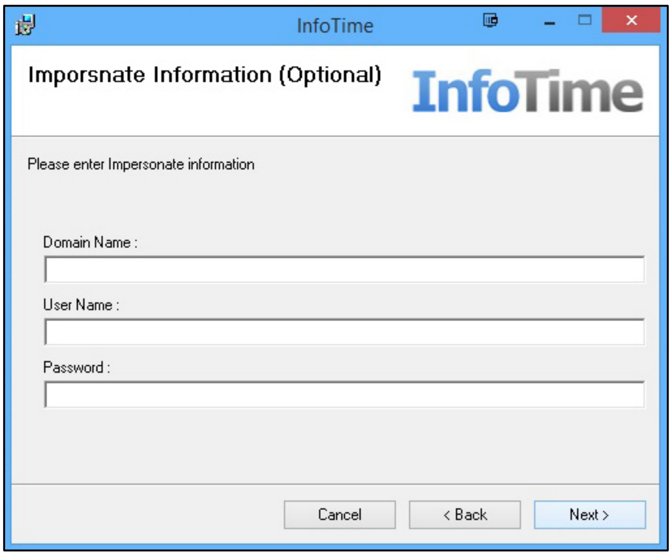


Fig 5

When the Next button is clicked the installation routine will proceed to install the web interface. Once the installation has finished a second installation routine will load. This second installation installs the Windows Service which runs in the background on your system to collect clockings from the terminal and calculate the employee hours (Fig 6). Click Next

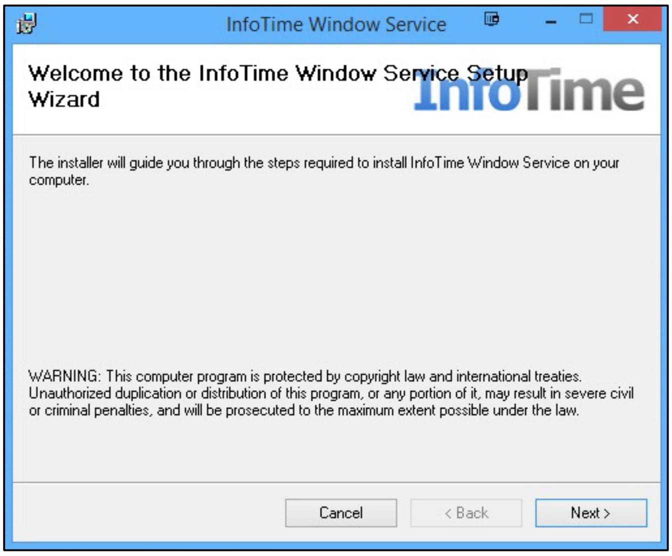


Fig 6

On the next screen the system will ask for details of where to install the files for the Windows Service. It is suggested you leave this as the defaults as shown in Fig 7. Click Next to proceed.

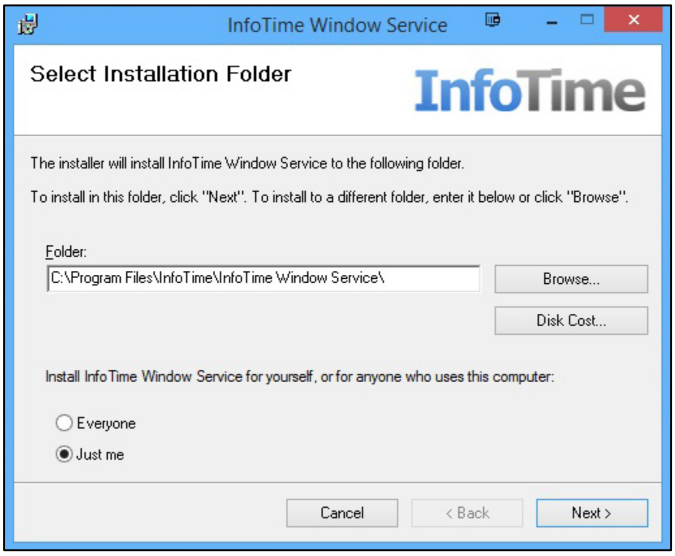


Fig 7

The next screen will load the Licence Agreement (Fig 8), accept this and click Next.

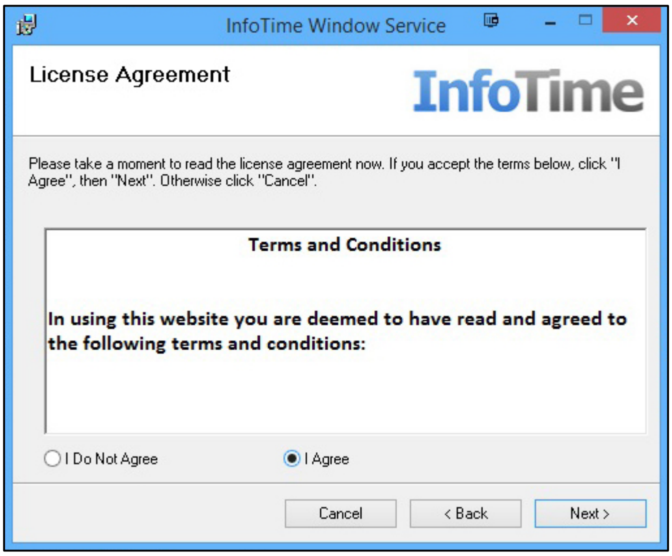


Fig 8

The system will then ask for confirmation that you wish to install the service. Click Next and another screen will load which asks for connection details to the SQL server to be used.

These must be the same as the ones used during the installation of the web interface. The defaults are:

Database Server:	localhost\infotime
Database Name:	InfoTime
Username:	sa
Password	ClockingSystems123

Enter these details in the relevant boxes and click Next (Fig 9).

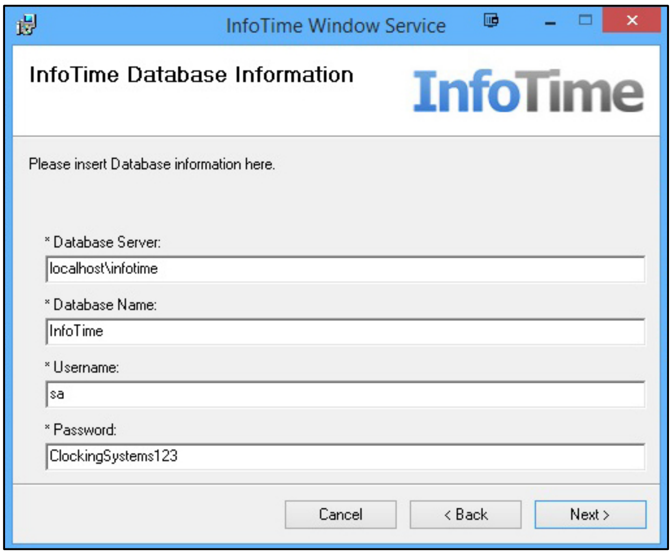


Fig 9

Once the Next button is clicked the installation will proceed. Once it has finished, click Close. This completes the installation of the system. To access the software, open a web browser, in the address bar enter http://localhost/[VirtualDirectory] where the virtual directory is replaced by the value you entered in the Virtual Directory box during the first part of the installation. For instance if you used InfoTime as the Virtual Directory name the address would be http://localhost/InfoTime.

How to Register InfoTime

Before you can use the system you must register the software. You should have received a registration code along with the details of where to get the installation routine, if you haven't please contact your retailer.

When you access the page http://localhost/[VirtualDirectory] for the first time there will be a short delay while the software initialises the database for the first run, please wait until this is finished (it may take a number of minutes). Once it has finished you will be presented with the registration screen (Fig 1).

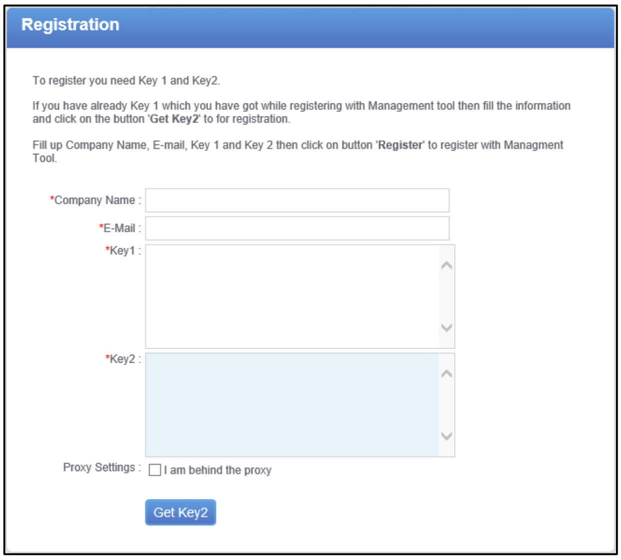


Fig 1

Enter your registration details in the relevant box (Fig 2)

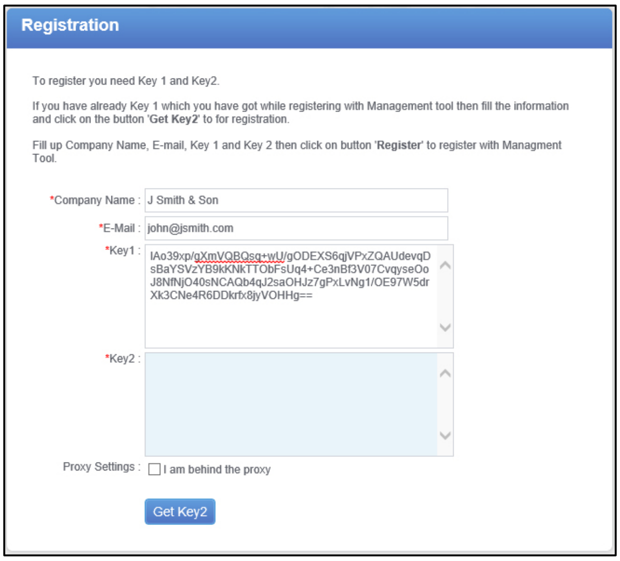


Fig 2

Once you have entered these details click Get Key2. The software will check with the registration server to make sure your registration is valid. When a response is received, the second part of the registration key will be entered into the box marked Key2 and the button will change to Register (Fig 3). Click the Register button.

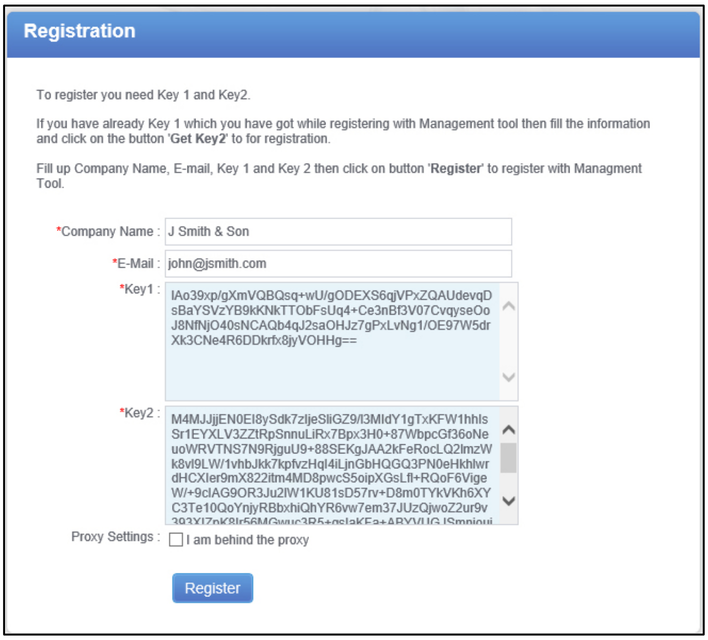


Fig 3

Once the registration is complete the Login page for InfoTime will load (Fig 4). You can then use the initial login details provided with your registration details to log into the software.

Fig 4

After your first login it is suggested that you change your password to one of your own. To change your password click on Account at the top right hand side of the page (Fig 5).

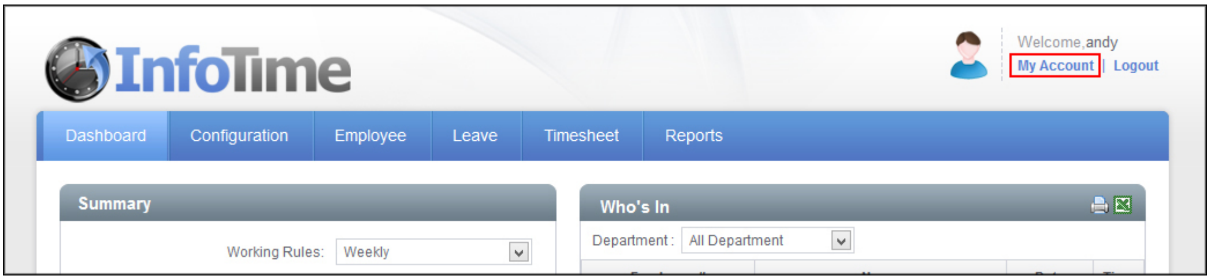


Fig 5

Your account details will load, in the box marked Password enter your new password. Then confirm this in the Confirm Password box. Once you have entered your new password click Save (Fig 6).

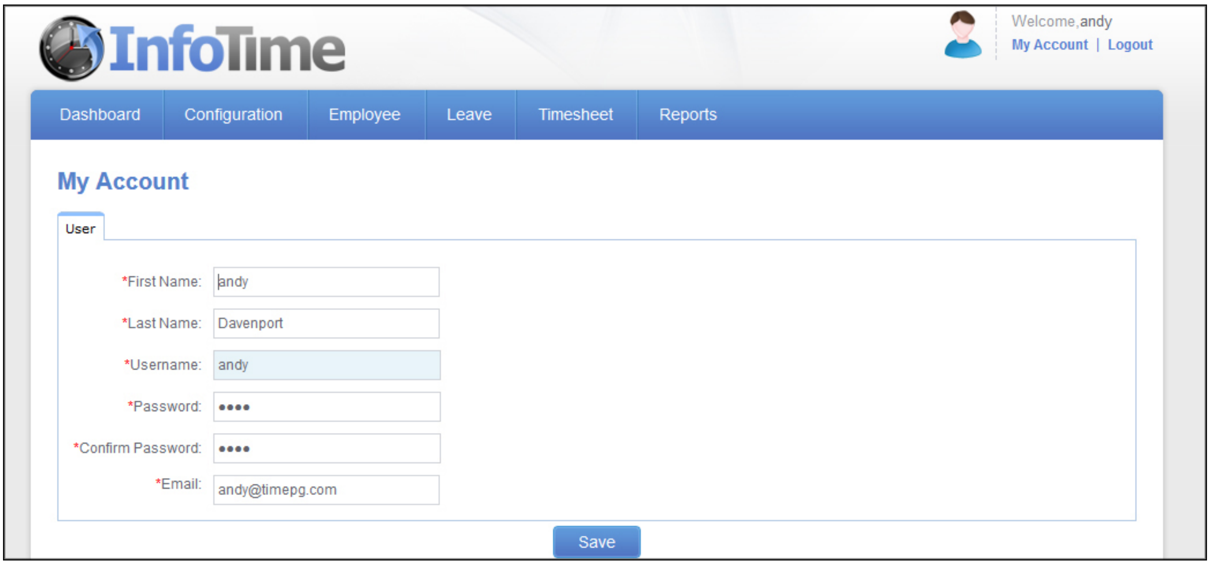


Fig 6

Setting up a Clocking Terminal

You only need to setup a terminal if you are collecting data via TCP/IP. If you will be collecting your information by USB datastick then this section can be ignored.

Once you have logged into the software go to Configuration – System Settings (Fig 1)

Fig 1

From the System Settings screen click on the Device Configuration tab (Fig 2)

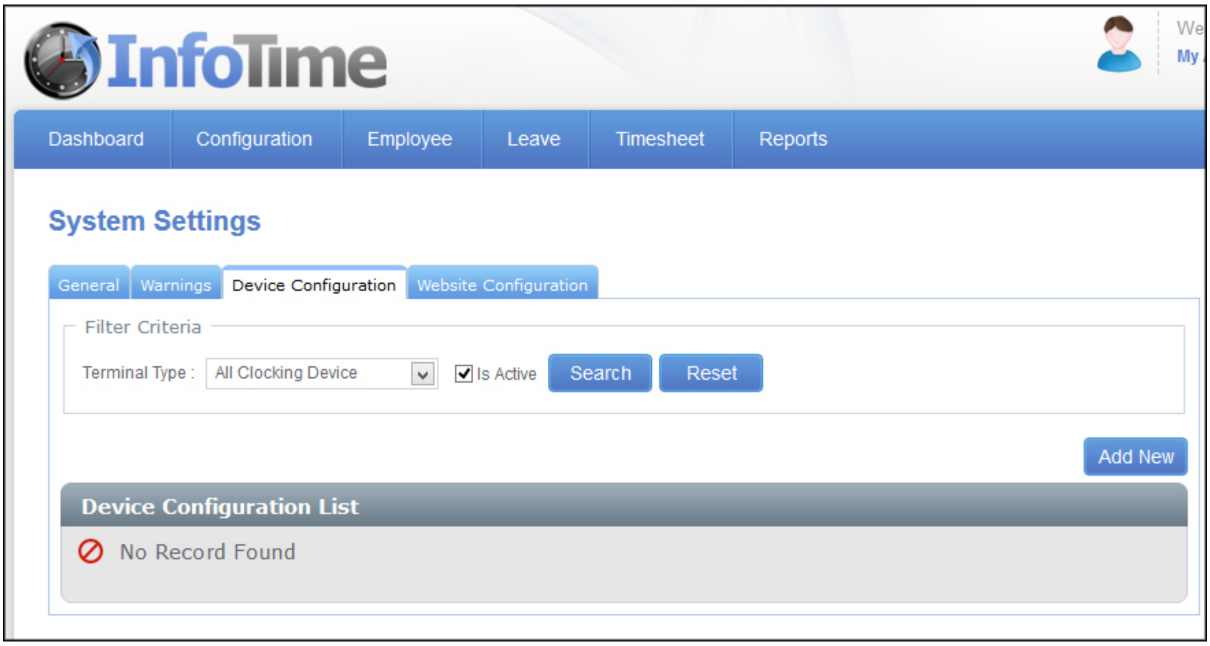


Fig 2

This will show a list of the devices that are currently set up in your database. Click the Add New button.

A blank entry will then be created allowing you to enter the details for the new terminal. Under the Terminal Type click the dropdown menu to select the correct device (Fig 3)

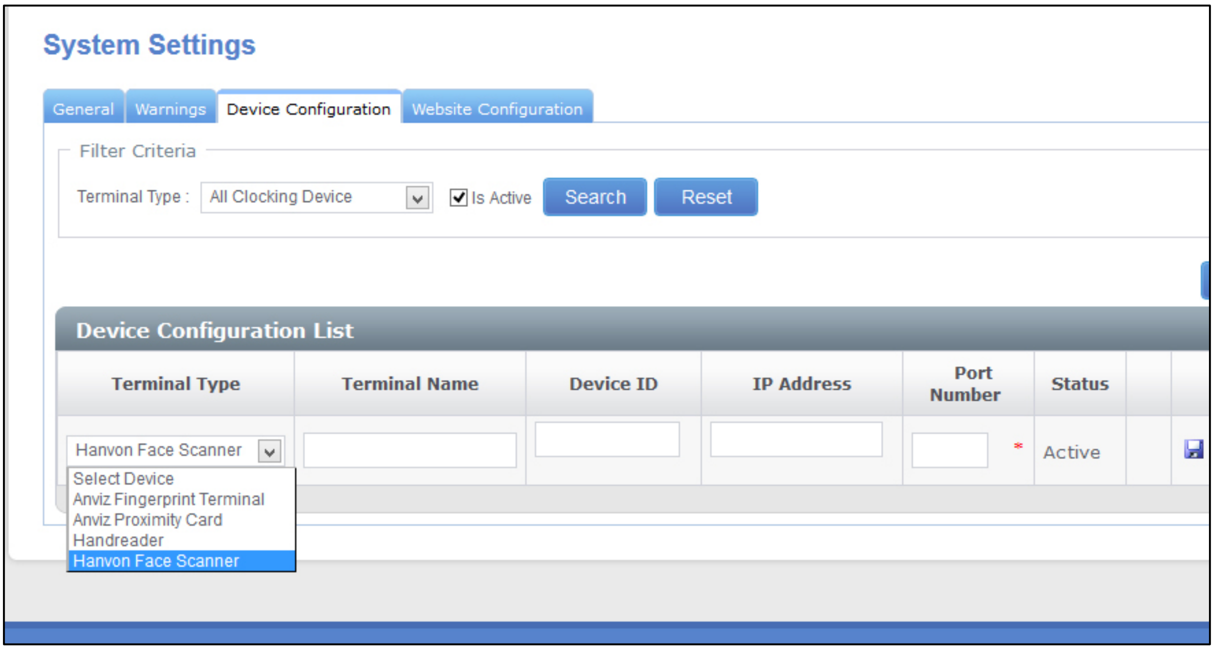


Fig 3

In the Terminal Name box enter a name for this device, this name is one of your choice which will allow you to see at which terminal a clocking was made when viewing original clockings.

The value to be entered in the Device ID box will depend on the type of terminal you are connecting. With a Handreader and a Face Scanner the device ID can be any number i.e. device A is Device ID 1, device B is Device ID 2. With the Fingerprint Terminal and the Proxy Card the Device ID should match the Device ID of your terminal.

Enter the IP Address of the device in the IP Address box, if you are unsure of the IP Address this can be checked in the device menus.

The Port Number box is only available with the Face Scanner, by default this should be set to 9922.

Once you have entered the details click the floppy disk icon shown at the right hand side of Fig 3 to save this entry.

After the terminal is added to the system the software will automatically check for new clockings on the terminal every minute. New clockings will be downloaded and added to the database without user interaction.

Collecting Data Via USB

When collecting clocking data by USB datastick there is no need to add a terminal to the software. The first step is to follow the instructions for downloading the information from the terminal on to a USB datastick. Once you have completed this, plug the USB stick into the computer.

Then from the top menu of InfoTime go to Configuration – Import Clocking Data (Fig 1)

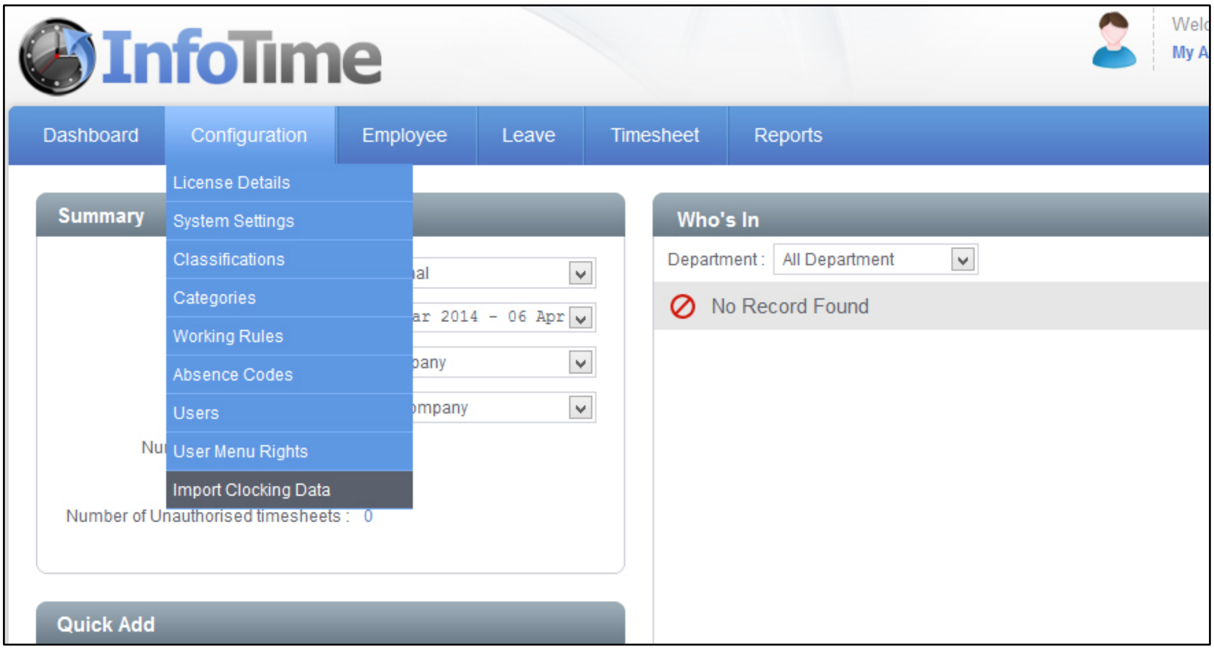


Fig 1

The Import Clocking Data screen will load. (Fig 2)

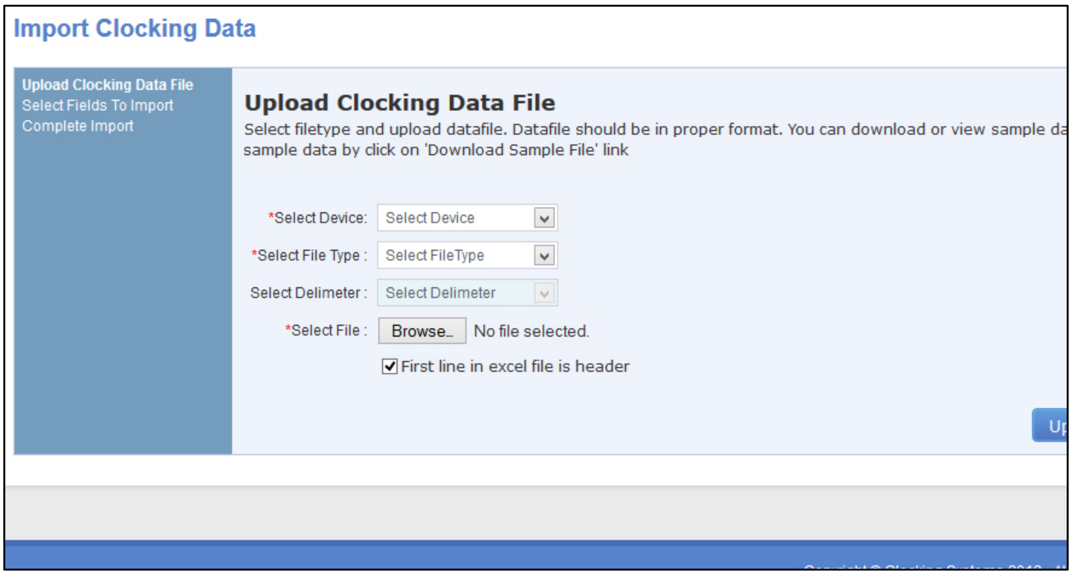


Fig 2

You must complete each section marked with a * to proceed with the import.

First click the drop down menu for Select Device Type. From the list of possible device types select the correct type for your clocking terminal.

Once you have entered the Device Type click on the box marked Select File Type. For either the Fingerprint Terminal or the Proxy Card the File Type should be USB File (*.KQ, *.NKQ). For the Face Scanner the File Type should be Fixed Format File (*.txt).

The Select Delimeter field should not be selectable.

Once you have set the Device and File Type click Browse. A screen will load which you can use to locate the file you wish to import. Browse to the location on your USB stick where the file has been created (Fig 3).

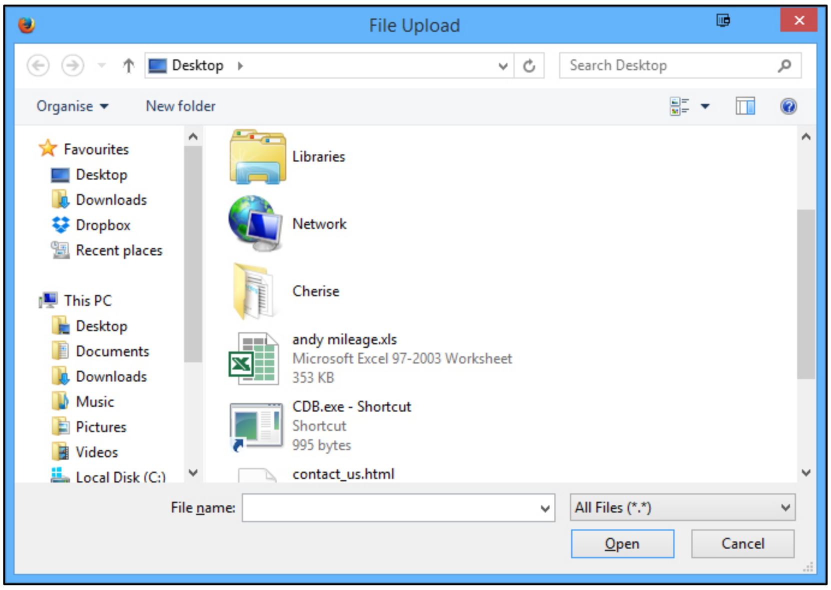


Fig 3

Once you have selected the file to upload click Open. A new screen will load asking you to select the fields to import (Fig 4)

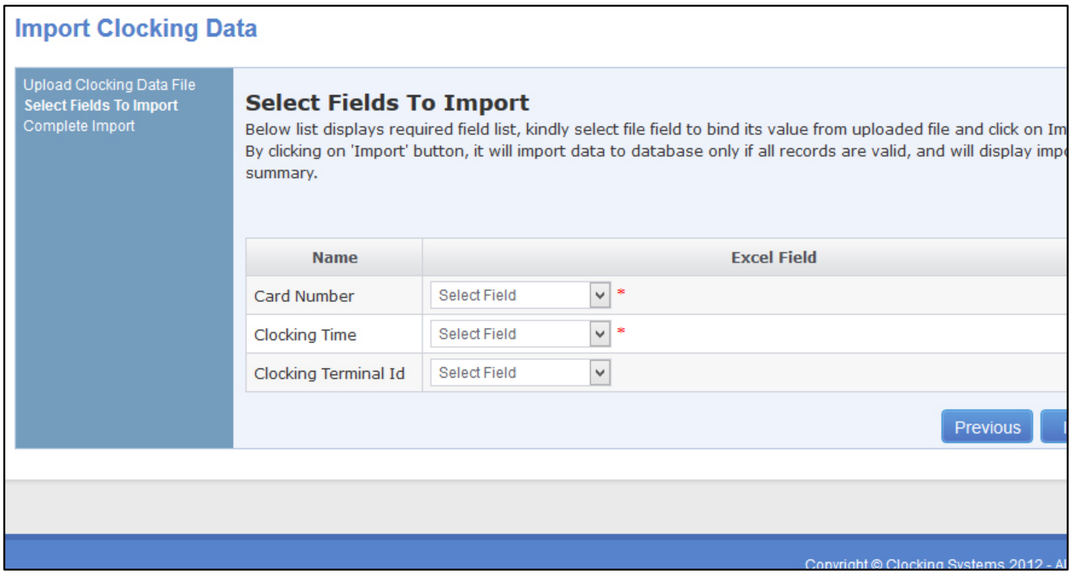


Fig 4

Click the drop down field for Card Number and select ID from the list.

Click the drop down field for Clocking Time and select time from the list.

Click the drop down field for Clocking Terminal ID and select dev_id from the list.

Once you have set these fields click Import.

After the Import has finished an import report will be shown (Fig 5)

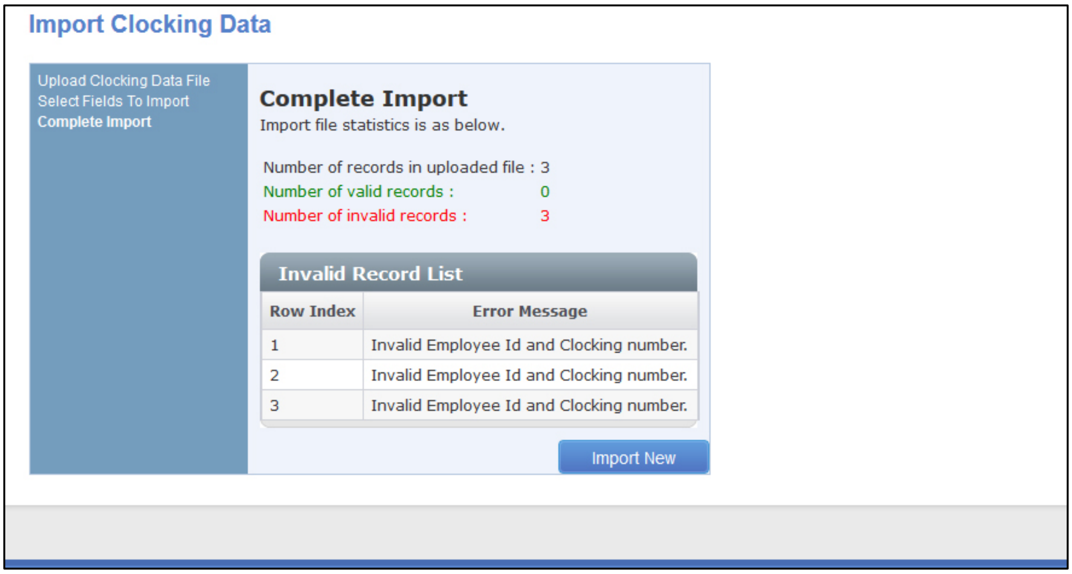


Fig 5

The report shows the number of clocking records in the file, the number of valid records that have been imported into the system and the number of invalid records that the import has rejected. It will then list which records have been rejected along with the reason.

Categories

Categories are the different time rates that your employee might get paid at. For example if your employees get overtime after a set number of hours then you have two Categories, one for normal time and one for overtime. You need to setup a Category for each different rate your employees can be paid. You can then setup Working Rules that control when an employee is paid at a particular Category. To setup your Categories, log into InfoTime then on the top menu bar select Configuration – Categories (Fig 1)

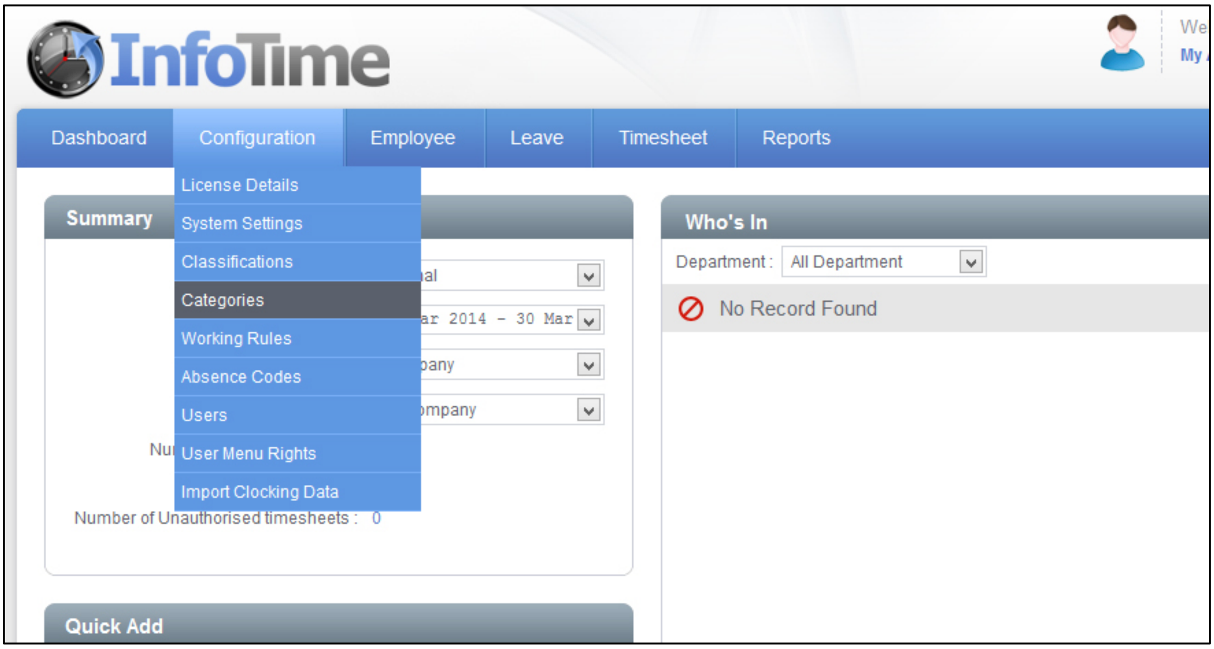


Fig 1

The Manage Category screen will load. This screen will list all the Categories currently setup in your system (Fig 2)

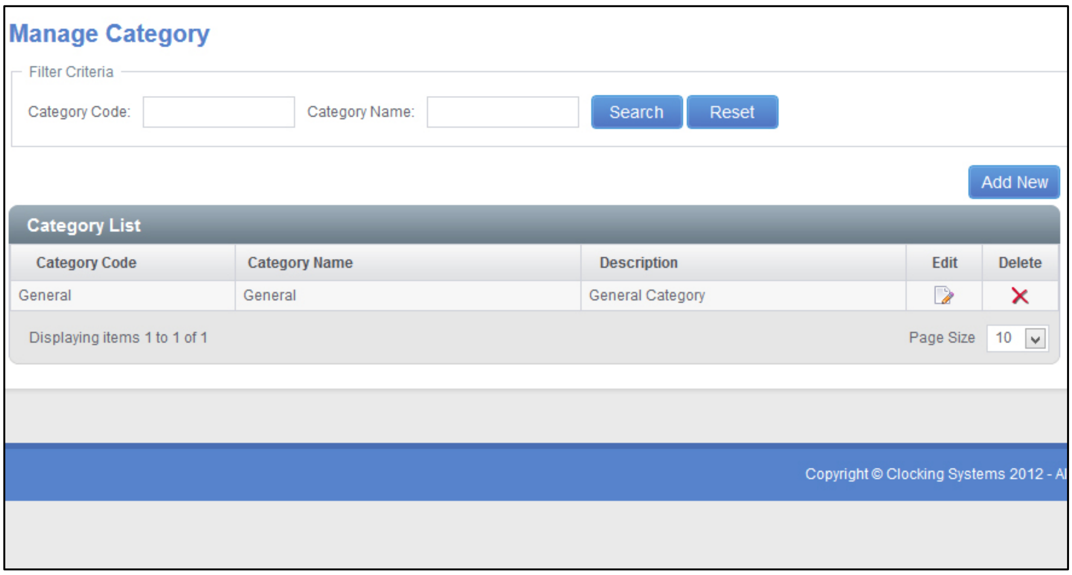


Fig 2

From this screen click Add New. A new entry will be added to the Category list where you can enter the details of the new Time Category (Fig 3).

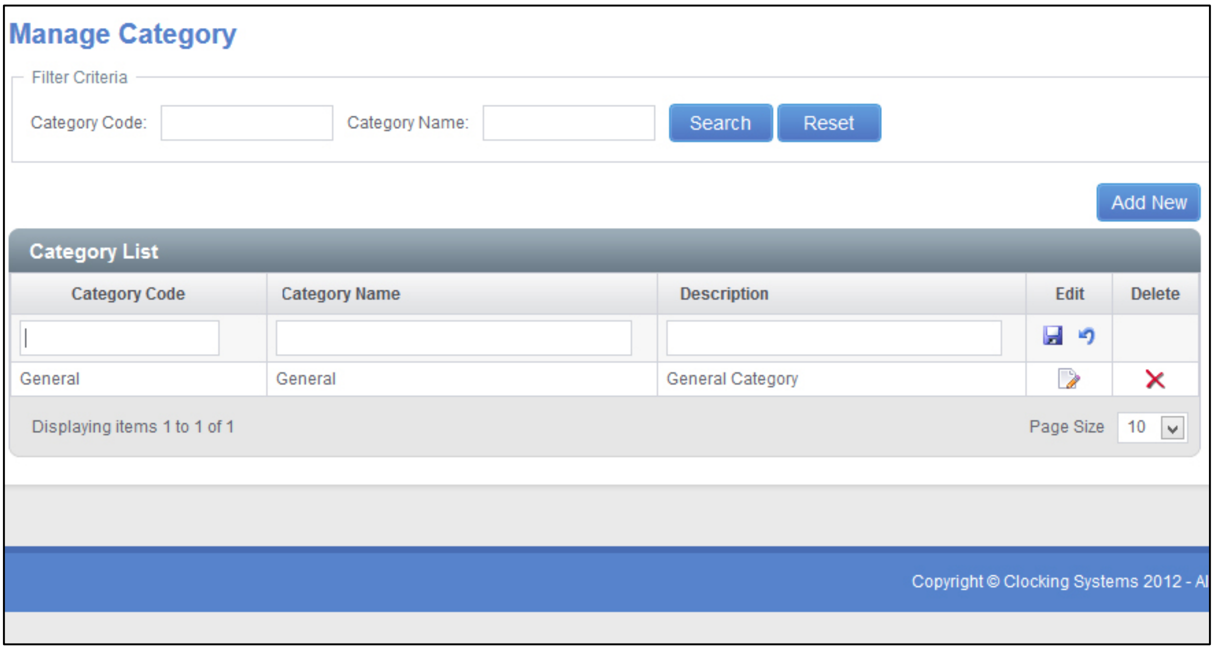


Fig 3

Category Code is a short name for this time category, it can be any alphanumeric value of your choice.

Category Name is the actual name for this category, again this can be any alphanumeric value,

Description is an optional field where you can describe when this Category might be used for reference purposes.

Once you have entered the details click the floppy disk icon in the Edit box of that row to save the new Category.

Working Rules

To be able to use InfoTime to calculate the hours worked by your employee you need to setup a Working Rule. Each Working Rule is a collection of settings that can be applied to an employee which govern things should as how the clocking times are rounded, when a break should be deducted and when an employee would be working at any overtime rates.

To create a new Working Rule from the menu bar at the top go to Configuration – Working Rules (Fig 1)

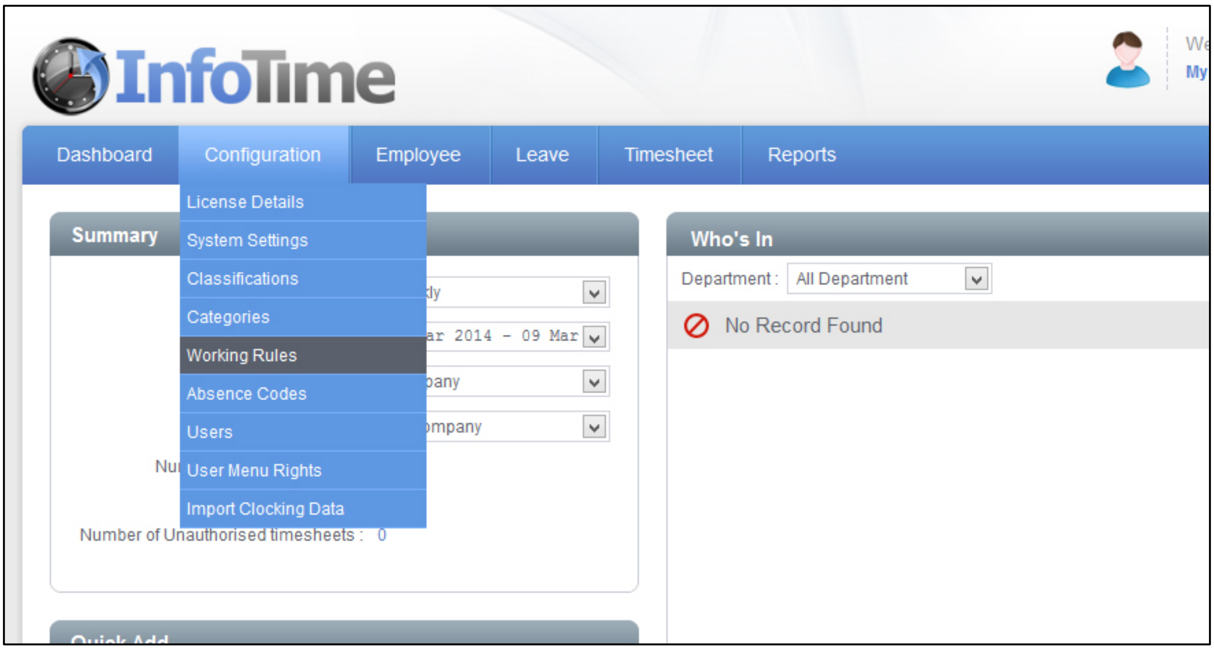


Fig 1

The Manage Working Rules screen will load, showing a list of all the Working Rules currently setup in your system. To add a new one click the Add New button (Fig 2).

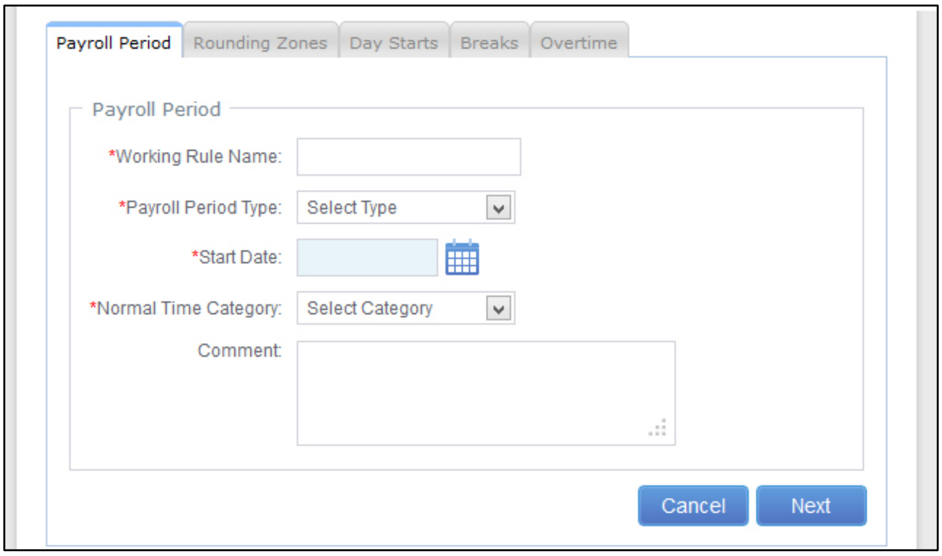


Fig 2

In the Working Rule Name box you can enter any name that will make it easy for you to identify this Working Rule when applying it to an employee i.e. Normal, Standard, 40 Hours Per Week, etc.

The Payroll Period Type controls how often this Working Rule will create payroll totals. It also governs the date range over which a Period Overtime rule is applied, for example if the employee had a period overtime of 40 hours a week at normal time before they get over time the Payroll Period Type would be set to Weekly. The options are Weekly, Bi Weekly, Four Weekly and Monthly. These can be selected from the dropdown menu.

The Start Date should be set to match the start of your Payroll Period. For instance, if you are on a Weekly Payroll Period that runs Monday to Sunday the Start Date should be set to a Monday. If you are on a Monthly Payroll Period that runs from the 25th of every month then the Start Date should be set to the 25th of the Month. You can click on the calendar icon to select the Start Date

The Normal Time Category should be set to the category you've setup to be your normal time category.

Once you have set these values click Next.

On the next page you can set the rounding that is applied to in and out clockings throughout the day (Fig 3)

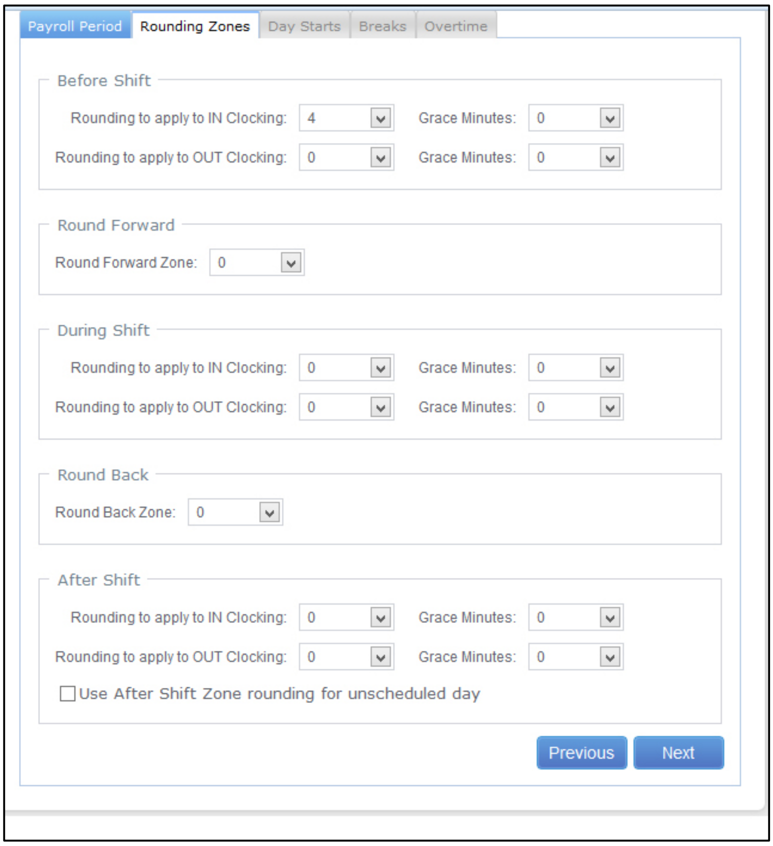


Fig 3

The day is split up into a number of Rounding Zones. Each zone allows you to apply different roundings to the employee's clockings depending on when the employee clocks.

The Before Shift Rounding Zone sets the roundings applied when the employee clocks in or out before their scheduled start time.

The During Shift Rounding Zone sets the roundings applied when an employee clocking in or out between their scheduled start and finish time.

The After Shift Rounding Zone sets the roundings applied when an employee clocks in or out after their scheduled finished time.

In each of these zones you can set a Rounding and Grace time for In and Out clockings. This allows you to specify if you want to round clocking times to an increment of your choice as well how long before the clocking is rounded up rather than down. For example if employees were allowed to clock in up to two minutes late and still get paid from their start time but anything after two minutes is rounded to the next quarter you would set the Rounding on in clockings to 15 and the Grace to 2.

The Round Forward and Round Back Zones work slightly different. The Round Forward zone deals with what happens if the employee clocks in just before their Scheduled Start Time. If the Round Forward Zone is set to 30 and the employee is supposed to start at 9am, if the employee clocks in between 8:30 and 9:00 the clocking will be rounded straight to 9. This is to allow for employees who turn up early, clock in but then don't start work until their Scheduled Start Time.

The Round Back Zone is a similar idea except it relates to when an employee clocks out after their finish time. If this is set to 15 and the employee is supposed to finish at 15:00, if the employee clocks out between 15:00 and 15:15 they will only get paid to 15:00. There is no Grace setting on the Round Forward and Round Back Zone.

Once you have set your Rounding Zones, click Next.

On the next screen you can set the start point of the day (Fig 4).

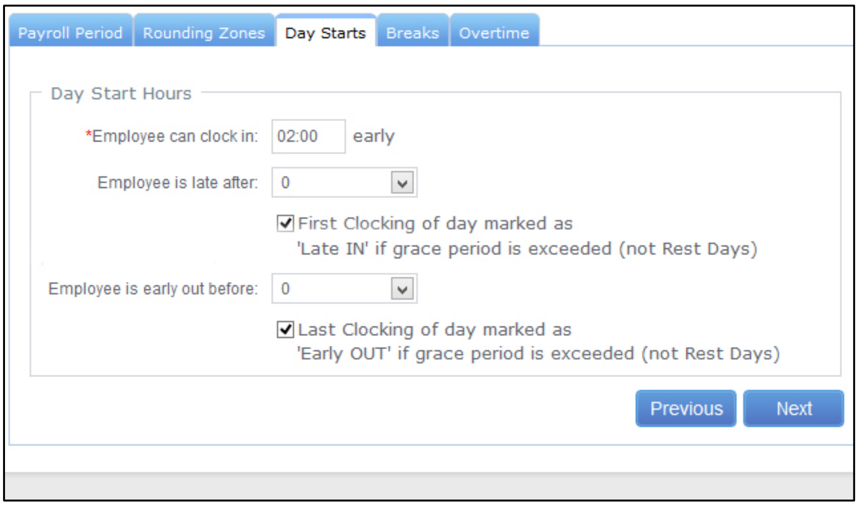


Fig 4

Normally a day would be classed as starting and finishing at midnight, however as employees might work past midnight we define a start and finish time for the day based on the employee's scheduled start time. This can be any value, but it's advised to make it a minimum of 2 hours.

Underneath are settings for when the system should generate warnings regarding late arrivals and early departures. The box marked "Employee is late after" specifies how many minutes late the employee can turn up before the system generates a warning saying he has clocked in late. The tick box below must also be ticked for this warning to be generated.

Similarly there is a setting for "Employee is early out before" this governs the number of minutes the employee is allowed to clock out early without a warning being generated saying they have left early. As with the previous setting the tick box also needs to be selected for the warning to be generated.

Once you have set these options, click Next.

The next section will deal with any breaks that the employee might be entitled to (Fig 5).

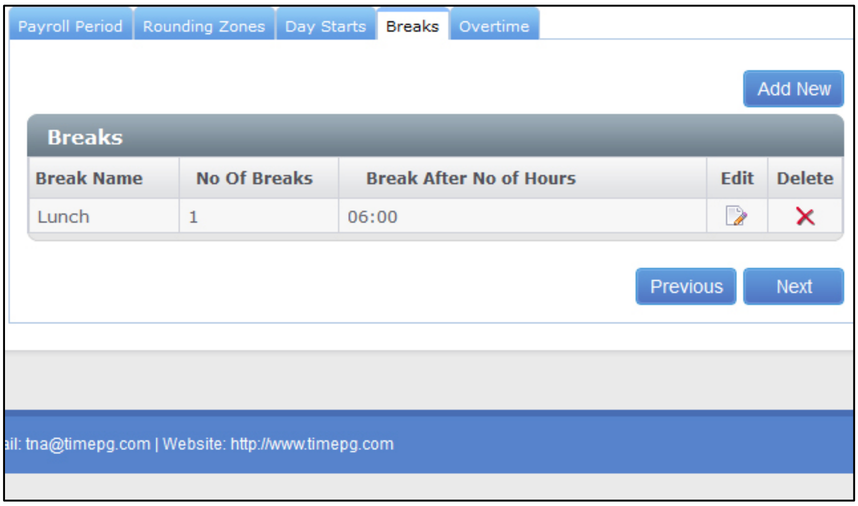


Fig 5

There are two ways breaks can be setup, they can either be deducted based on the total number of hours worked by an employee, or they can be deducted at a scheduled time.

Multiple break rules can be applied to the employee, which one the system uses when processing the hours for a given day will be determined by the length of time that the employee works on that day. However the breaks must all be either scheduled or deducted after a set number or hours have been worked, they cannot be a mixture.

To add a new rule click Add New. The Manage Breaks screen will load allowing you to enter the settings for this break (Fig 6).

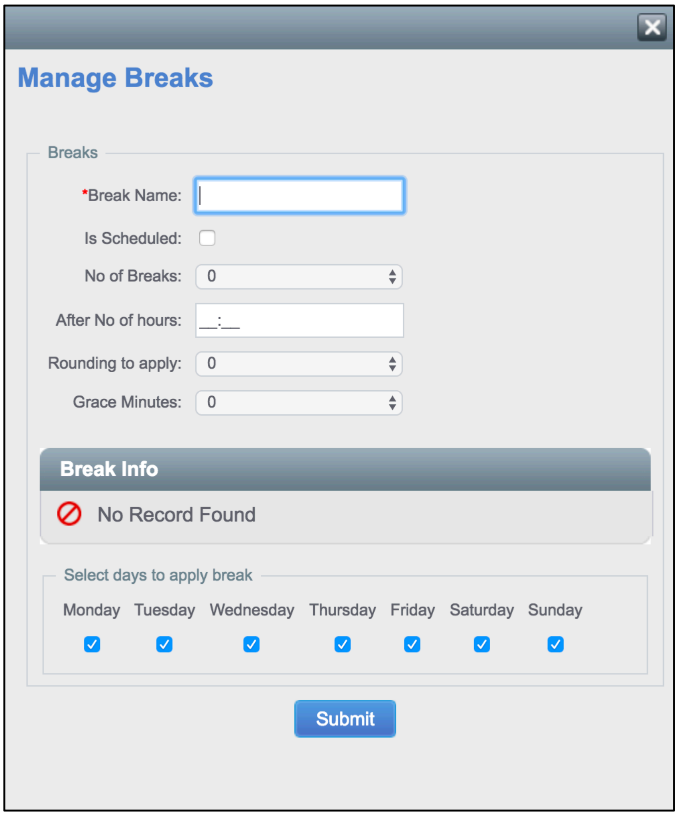


Fig 6

The Break Name is a compulsory field but can be any name of your choosing. In the number of breaks enter the number of breaks the employee is entitled to. If the Is Scheduled options is unticked, then in the box marked After No of Hours enter the number of hours after which this break should be deducted.

The Rounding to apply and Grace Minutes settings control what the system will do if the employee takes too long on their break. If set as shown in Fig 24 if the employee takes more than 3 minutes extra on their break they would be deducted an extra 15 minutes.

Once you have set the number of breaks you will be given the option to specify the Break Duration for each break and also whether the break is paid or not.

When a break is set as unpaid, if the employee clocks the break and takes less than the number of minutes specified in the Break Duration box then the system will round the value up to the number of minutes specified in the Break Duration box. If the employee takes more than the number of minutes specified in the Break Duration box then the system will round the total length of the break based on the rounding rules specified and deduct that value from the employee's hours for the day. If the employee does not clock the break then the system will deduct the full length of the break.

When a break is set as paid, if the employee clocks the break and takes less than the number of minutes specified in the Break Duration box then nothing is deducted from their hours for the day. If the employee takes longer than the time specified in the Break Duration box then the length of the break is rounded in accordance with the specified rounding rules and the anything over the Break Duration is deducted from the employee's hours. If the employee does not clock then nothing is deducted.

If the employee does not work more than the number of hours specified in the box After No of hours then the break rule will not be applied and any clockings made by the employee will be rounded in accordance with the Rounding Zones set up earlier. If the employee gets more break the longer he works then multiple break rules can be setup i.e. if the employee works 6 hours he is entitled to a 30 minute break, if he works more than 12 hours he is entitled to a 45 minute break a rule will need to be set up for each option and then system will apply the correct rule based on the length of time worked.

If the Scheduled Break option is ticked, then the options for No of Breaks and After Number of Hours will be disabled and you will only be able to enter the Rounding Rules, break start and finish times will then be entered on the Schedule Planner when assigning a pattern to the employee. Regardless of which option is ticked at the bottom there is an option to select which days this break rule applies to.

Once you have set these options click Submit to save the break rule.

If you have entered all your break rules click Next to proceed.

The final screen on the Working Rules is the Overtime Options (Fig 7)

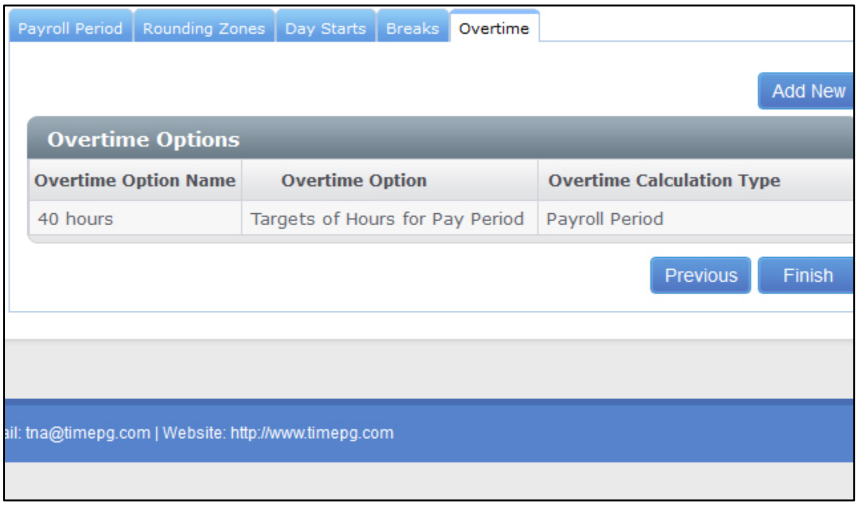


Fig 7

If all hours working on this working rule are paid at normal time then you do not need to enter any over time settings and can simply click Finish.

If your employee do get paid overtime depending on certain conditions then the rules can be setup from here. To add an Overtime Option click Add New, the Manage Overtime Options screen will load (Fig 8).

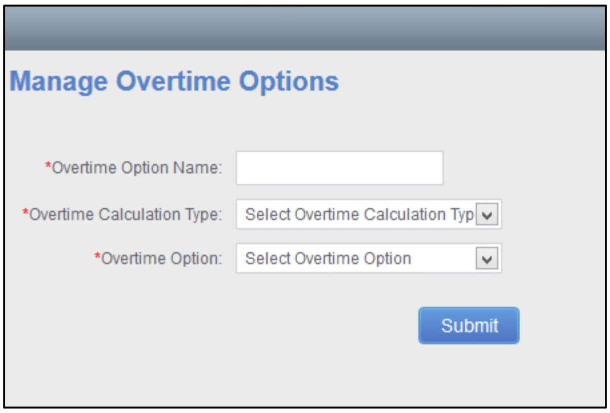


Fig 8

The Overtime Option Name is a name of your choosing. Enter value that gives a description of the rule i.e. if the rule gives overtime after the employee has worked 40 hours at normal time in the pay period you could call it 40Hr Rule.

You are then asked for the Overtime Calculation Type. There are two options, Daily or Payroll Period. Daily would be for where employees can earn overtime after they have worked a set number of hours in a day. Payroll Period would be where overtime is only earned after an employee has reached a set number of hours for the whole of the Payroll Period.

After Selecting the Overtime Calculation Type you must then select the Overtime Option. The list of options depends on the Overtime Calculation Type picked.

Calculation Type Daily:	
Overtime Options:	**Description**
Target of Hours Per Day	With this option an hours target for normal time is specified in the Working Rule. Once the employee works over this number of hours on a daily basis they are considered to be on overtime. You can specify the category to which hours over the target are sent. You can also specify a target on this overtime category should the employees get paid at an even higher rate later i.e. 8 hours at normal time, 2 hours at OT 1 and then everything else at OT 2. Every day has the same target with this rule
Pay a Day at a Set Rate	When this method is chosen you will be shown a table with each day of the week and you can select the category for that day. All hours worked on that day will be paid at the chosen category.
Daily overtime targets for each daily schedule	This method is similar to Target of Hours Per Day, except that the overtime target can be different on each day. When it is selected you will be asked to enter a target for the day when applying a Start and Finish time to an employee in the Schedule Planner screen. You will enter any additional overtime targets here.
Daily overtime targets set by expected hours	As above except no target is entered when setting the Start and Finish times. Instead the system works out the hours the employee is expected to work on that day and uses this as the normal time target.

Calculation Type:	
Overtime Options	**Description**

Target of hours for Pay Period	This method is similar to the Daily method "Target of Hours Per Day" except this time the target entered is for the total number of hours at normal time over the length of the payroll period
Period overtime target set by expected hours	As with the Daily method "Daily overtime targets set by expected hours" the system will calculate the total number of hours the employee is scheduled to work over the Payroll Period and then use this as the target for normal time.

Once you have setup your Overtime Rule click Submit to save it.

You can now click Finished to save your Working Rule.

Classifications

The Classifications in InfoTime allow you to filter screens and reports to only show information relation to specific groups of employees i.e. see the total payroll hours for all employees in one particular department.

To setup your Classifications, login to InfoTime and from the top menu bar select Configuration – Classifications (Fig 1).

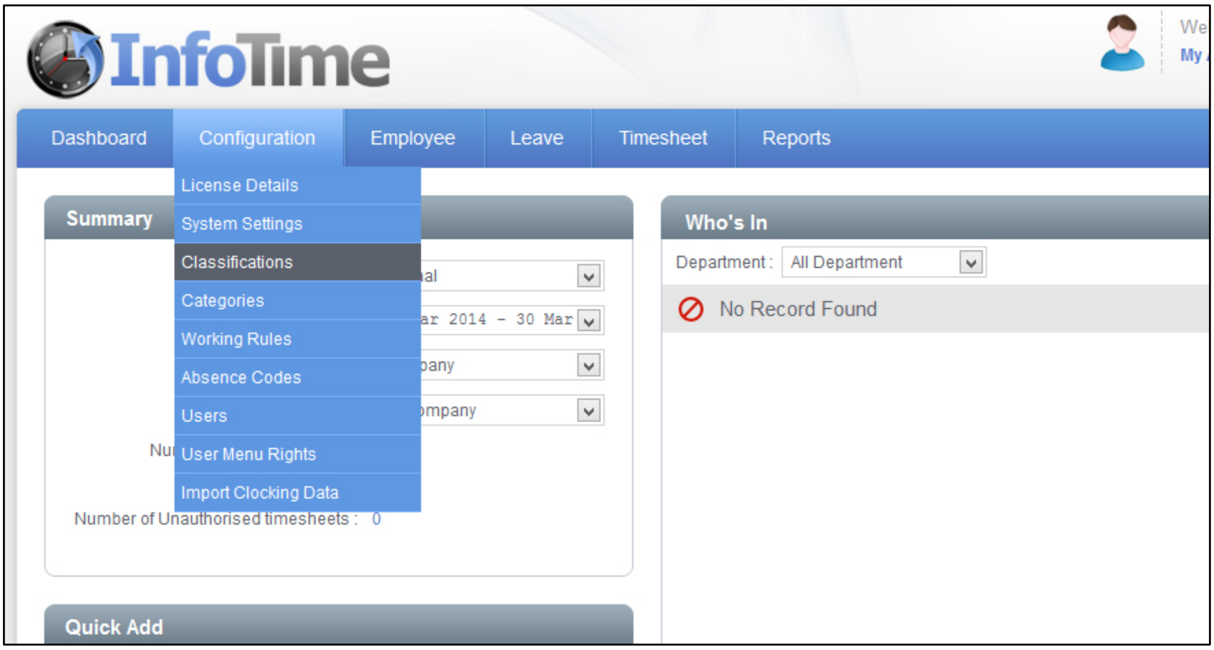


Fig 1

The Classifications section of the system will then load (Fig 2).

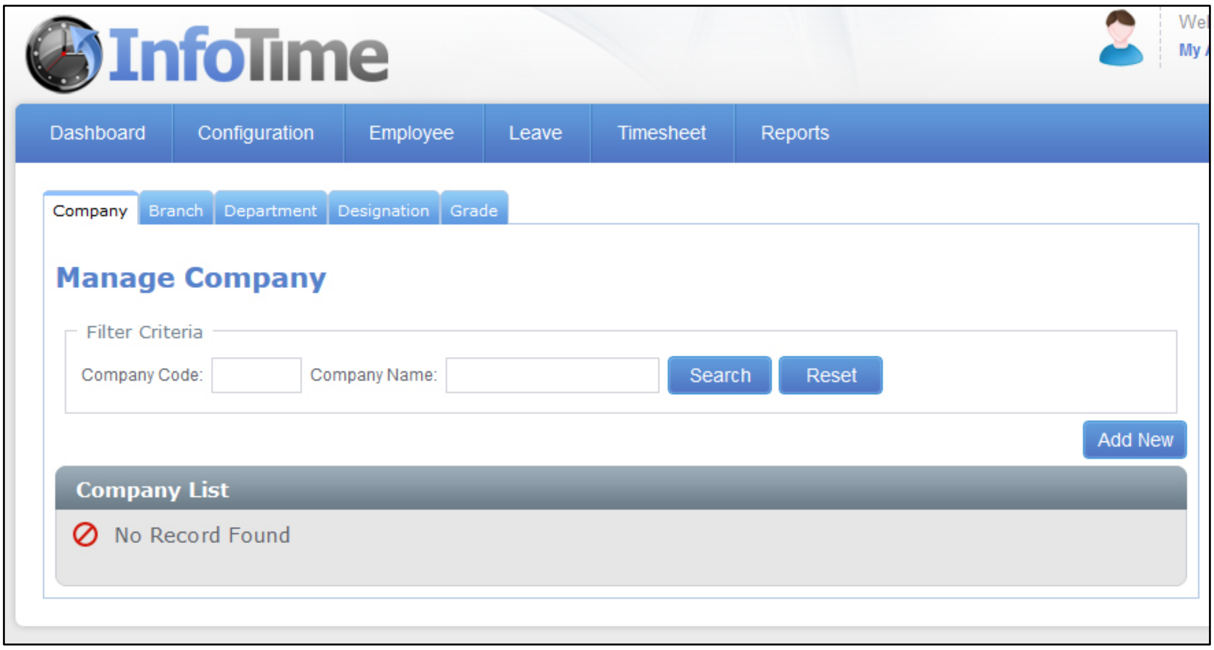


Fig 2

There are four different types of Classification in InfoTime (Company, Branch, Department, Designation and Grade), you can choose to use as many or as few of them as you wish. Three of the Classifications are related to each other. Designation is a sub Classification of Department and Department is a sub Classification of Company, this means you can setup departments that are only used in one section of your business.

Select the Classification you wish to add from the tabs at the top and click Add New. If you are adding a new Company you will be presented with the screen in Fig 3.

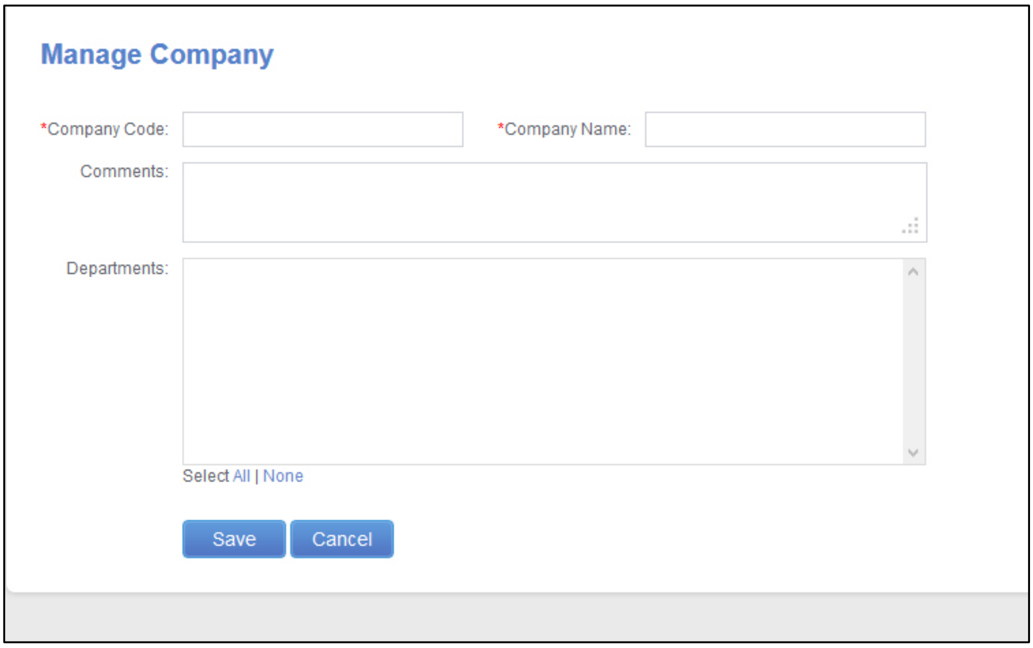


Fig 3

In the Company Code box you can enter an alphanumeric code for this company i.e.C01. The Company Name box should be the name of the company as you want it to appear in the software. The Comments box is an optional field for your own notes.

If you have created any Departments then they will be listed in the Departments box, you can then select which Departments it is possible to assign employees to in this company.

Once you have entered these details, click Save.

Absence Codes

Absence Codes are all the different reasons why your employee's might not be attending work on a given day i.e. annual leave, sickness, etc. You must define these codes before you can book time off for your employee's against them.

To create an Absence Code, on the top menu go to Configuration – Absence Codes (Fig 1)

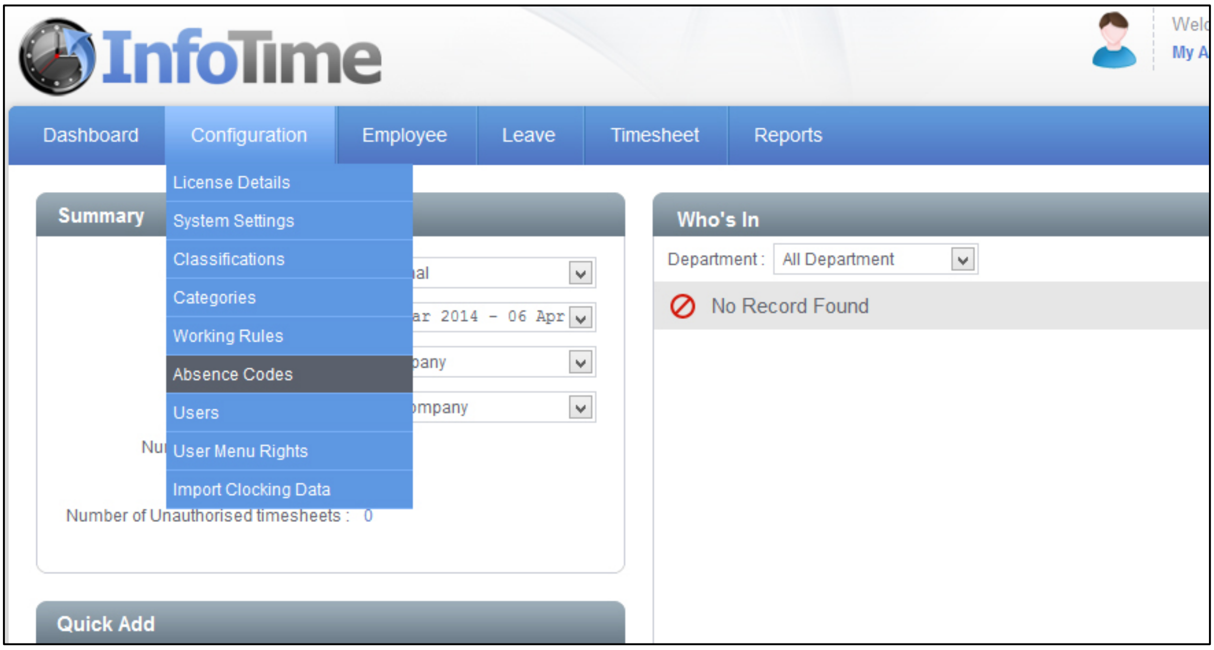
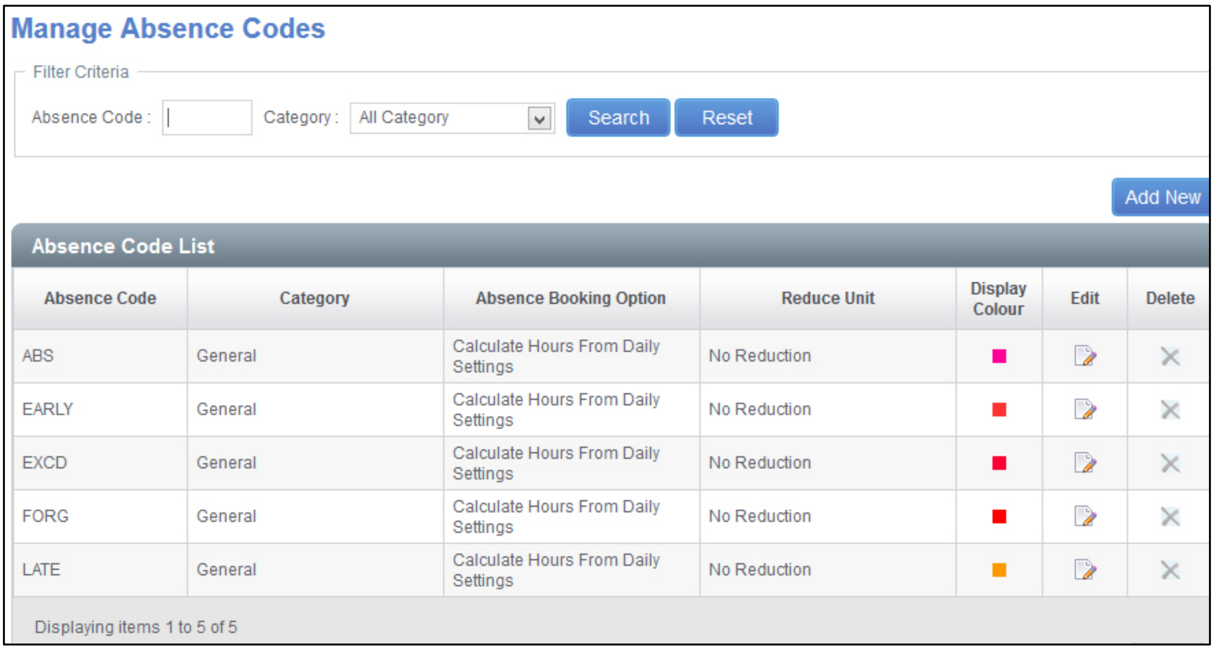


Fig 1

A screen will load showing all the Absence Codes currently setup in your system. It will also show the Anomaly Codes for things such as Late Arrival and Early Departure (Fig 2).



Absence Code	Category	Absence Booking Option	Reduce Unit	Display Colour	Edit	Delete
ABS	General	Calculate Hours From Daily Settings	No Reduction			
EARLY	General	Calculate Hours From Daily Settings	No Reduction			
EXCD	General	Calculate Hours From Daily Settings	No Reduction			
FORG	General	Calculate Hours From Daily Settings	No Reduction			
LATE	General	Calculate Hours From Daily Settings	No Reduction			

Fig 2

Click Add New.

The Manage Absence Code screen will load (Fig 3).

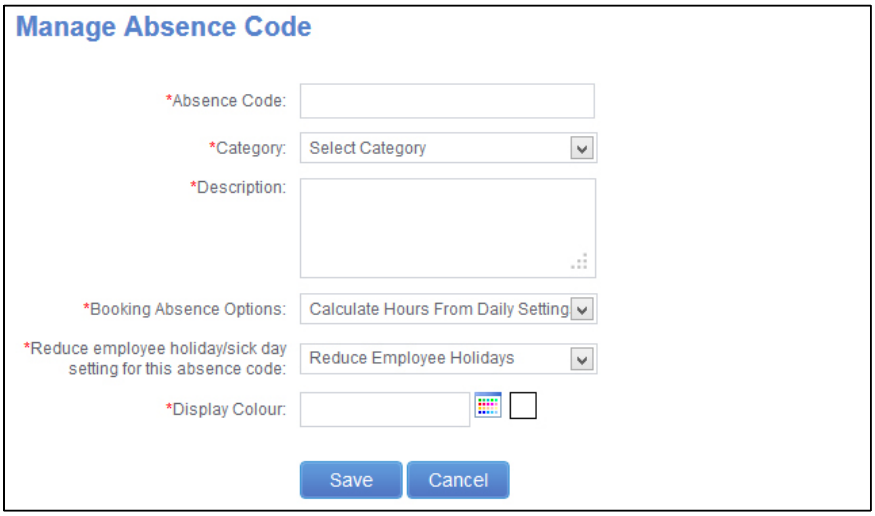


Fig 3

All sections marked with a * must be completed.

In the Absence Code box you can enter a short code for this Absence Type to make it easy to identify when looking at the Employee Timesheet.

Under Category you can set which Category the hours calculated for this Absence Type are shown against. This could be your Normal time Category or some other Category you have defined previously.

In the Description box you can enter a full description for this Absence Code.

In Booking Absence Options you can specify how the system calculates the number of hours an employee receives when they are booked on this Absence Code. There are two options:

- Use Hours For Booking – A box then loads allowing you to enter the number of hours to give for this Absence Code. This is a fixed value and will be the same for all employees regardless of their scheduled hours.
- Calculate Hours From Daily Settings – The system will calculated how many hours the employee earns for this Absence Code based on their expected hours for the day. It is possible to book half days and full days under this setting as well as manually enter a number of ours when booking the absence.

In the Reduce employee holiday/sick day setting for this absence code option you can set if this Absence Code reduces their holiday entitlement, sick entitlement or makes no reductions at all.

The last option is to select a colour for this Absence Code, this colour will show on the Schedule Planner screen allowing you to easily distinguish between the different Absences booked when looking at that screen.

Once you have set this information click Save.

Email Settings

From version 2.3 of InfoTime onwards there are a number of features that can email information to end users (for example email a report to a user, email rota's to your employees). To make use of this function settings will need to be entered into the software for connecting to your email server.

To enter the email settings, on the top menu bar go to Configuration – System Settings (Fig 1).

Fig 1

From Systems Settings Select the Website Configuration tab (Fig 2).

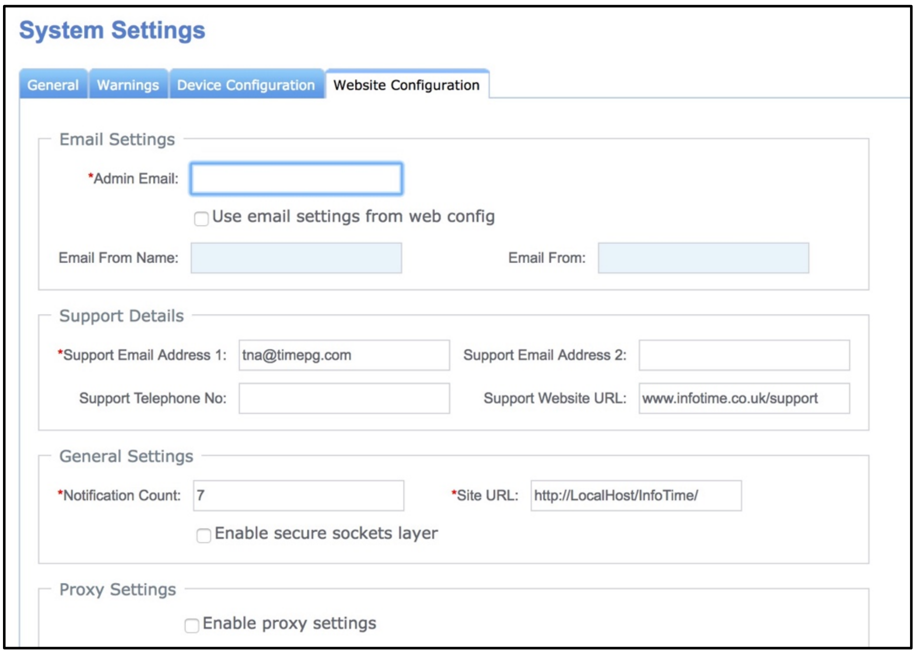


Fig 2

The Admin Email is the email address of the main administrator of the software. To enable the ability to send emails, the box marked User email settings from web config must be ticked. Once this box in ticked, the boxes for Email From Name and Email From must be completed. The Email From Name is the name to be displayed when in the mail client that receives the email. The Email From field is the address the email is sent from.

The Support Details section contains details of the support website and contact details. These do not need to be changed.

At the bottom under SMTP settings you must enter your SMTP server details and connection credentials.

InfoTime Dashboard

The InfoTime Dashboard gives an overview of how the system currently stands. (Fig 1)

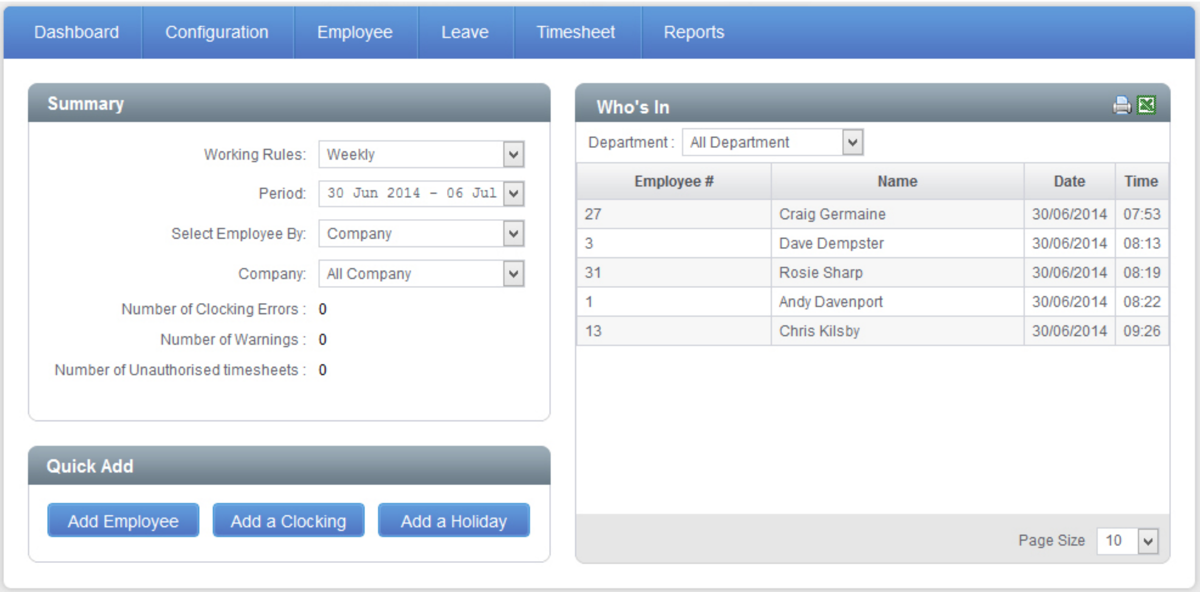


Fig 1

The Dashboard is split down into three sections. Each section deals with different information. The Summary details with warnings and errors for a payperiod. The Who's In section shows a list of who is currently clocked in. The Quick Add section gives quick access to a number of common tasks.

Summary

By default the Summary section will show information regarding this week. The first drop down menu allows you to filter for which Working Rule you are looking at. Once you have set the Working Rule you can select the Pay Period you wish to view (By default these will be set to the first Working Rule in your database and the current Pay Period).

You can then filter for which employees you see using the Select Employees by drop down menu.

Underneath is a list of the Number of Clocking Errors, Number of Warnings and Number of Unauthorised timesheets.

Clocking Errors

A Clocking Error is when an employee makes a mistake with their clocking that stops the system from calculating their hours without input with from the user. The usual cause of this would be an employee forgetting to clock. If an employee has a clocking error then it will show when you look at the employee's timesheet for that period. It will also show in the Number of Clocking Errors on the Summary section of the Dashboard.

If the Number of Errors on the Summary section is greater than zero then you can click on the number to see a list of all the current clocking errors for the selected criteria (Fig 2)

Employee Clocking Error List

Employee List

Employee #	Name	Date	Warnings/Errors
1	Andy Davenport	25/06/2014	FORG
13	Chris Kilsby	26/06/2014	FORG
16	Kevin Metcalf	23/06/2014	FORG
21	Mark Voce	24/06/2014	FORG
21	Mark Voce	23/06/2014	FORG
21	Mark Voce	26/06/2014	FORG
21	Mark Voce	27/06/2014	FORG
24	Andrew McMillan	24/06/2014	FORG
3	Dave Dempster	23/06/2014	FORG
3	Dave Dempster	24/06/2014	FORG

1 2 » »» Displaying items 1 to 10 of 14 Page Size 10

Fig 2

If you click on the date relating to for a Clocking Error then the system will load that employee's Timesheet for that Period. The day for the error occurred will be marked FORG in the Warning column. You can then Edit the employee's clockings for the day to rectify the error. Once you have fixed the error, close the Timesheet window to return back to the list of errors, the error you just fixed will be removed from the list.

Warnings

Warnings are a secondary notification, when a warning is generated the system is warning you that an employee has does something that is unusual that you might like to review. Warnings are things such as an employee clocking in late, clocking out early or not clocking in a day where they are schedule to work. Unlike Clocking Errors, Warnings generated by the system will not stop the system from calculating the employee's hours for that day.

If there are any Warnings in the selected Period then the Number of Warnings will be above zero. If this number is greater than zero then clicking it will bring up a list of the Warnings for the selected criteria (Fig 3)

Employee Clocking Warning List

Employee List

Employee #	Name	Date	Warnings/Errors
1	Andy Davenport	23/06/2014	EARLY
1	Andy Davenport	26/06/2014	ABS
10	Gaynor Lewis	26/06/2014	ABS
10	Gaynor Lewis	25/06/2014	ABS
10	Gaynor Lewis	23/06/2014	ABS
10	Gaynor Lewis	24/06/2014	ABS
10	Gaynor Lewis	27/06/2014	ABS
12	Daniella Mathers	27/06/2014	ABS
12	Daniella Mathers	23/06/2014	ABS
12	Daniella Mathers	24/06/2014	ABS

1 2 » »» Displaying items 1 to 10 of 104 Page Size 10

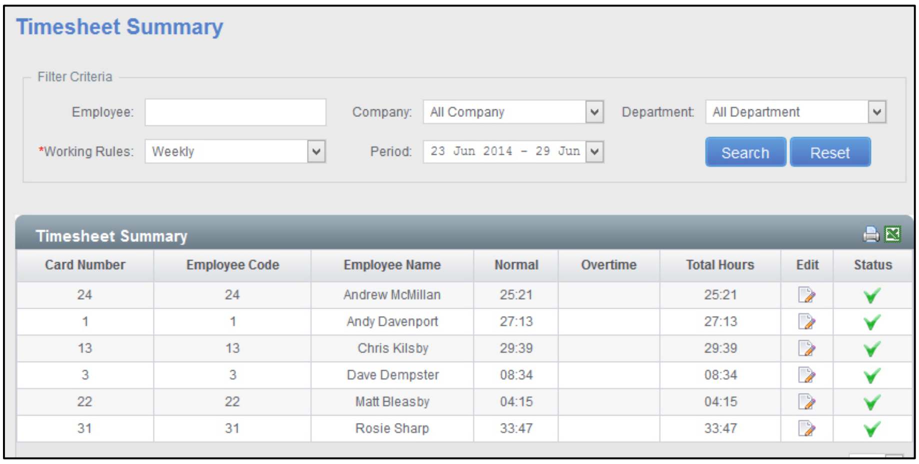
Fig 3

As with the Clocking Errors list, clicking on the date will load the employee's Timesheet for that period where you can review the error. Unlike Clocking Errors, Warnings are for your information purposes only and you do not need to adjust the clockings to fix them.

Unauthorised Timesheet

It is possible for a supervisor to log into InfoTime and authorise an employee's timesheet for payment after it has been reviewed. This is an optional feature that does not have to be used. However if you are using it when you look at a Pay Period on the Dashboard the number of Unauthorised Timesheets will be the number of Timesheets for that period waiting for a supervisor to authorise them.

If there are any Unauthorised Timesheets then the Number of Unauthorised timesheets will be greater than zero. Clicking the number will load the Timesheet Summary pay showing the employees with Unauthorised Timesheets (Fig 4)



Card Number	Employee Code	Employee Name	Normal	Overtime	Total Hours	Edit	Status
24	24	Andrew McMillan	25:21		25:21		
1	1	Andy Davenport	27:13		27:13		
13	13	Chris Kilsby	29:39		29:39		
3	3	Dave Dempster	08:34		08:34		
22	22	Matt Bleasby	04:15		04:15		
31	31	Rosie Sharp	33:47		33:47		

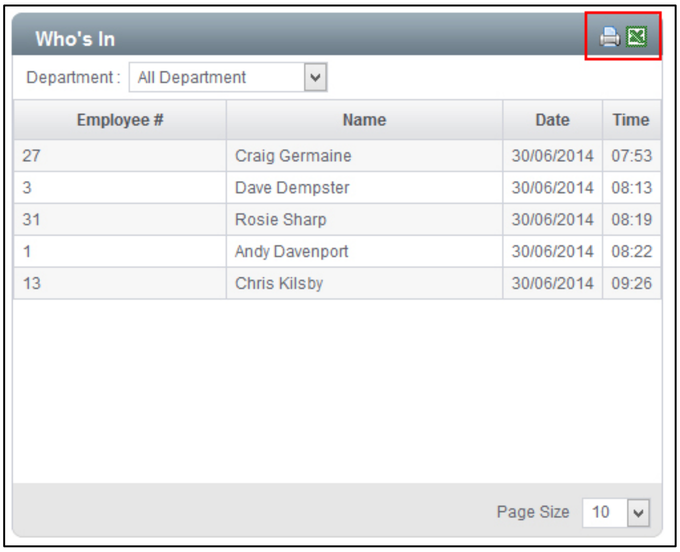
Fig 4

Clicking the Edit button will load the employee's timesheet for the selected period allowing you to review it. Clicking the tick under Status will authorise the timesheet for that employee.

The Unauthorised Timesheets feature is an optional feature. If you do not use it then this section can be ignored, it will not stop you from running reports on your employees.

Who's In

The Who's In section shows a list of the employees that are currently classed as clocked in. This list can be filtered by department or company. This list can be printed out or sent to Excel by using the icons at the top right of the section (highlighted in red in Fig 5).



Employee #	Name	Date	Time
27	Craig Germaine	30/06/2014	07:53
3	Dave Dempster	30/06/2014	08:13
31	Rosie Sharp	30/06/2014	08:19
1	Andy Davenport	30/06/2014	08:22
13	Chris Kilsby	30/06/2014	09:26

Fig 5

Quick Add

The Quick Add section provides quick access to common tasks you might need to do on a regular basis such as add a new employee, add a clocking or add a holiday (Fig 6).

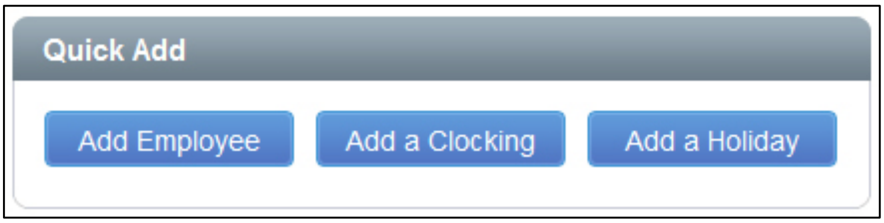


Fig 6

Add Employee

Clicking Add Employee will load the Manage Employee screen (Fig 7)

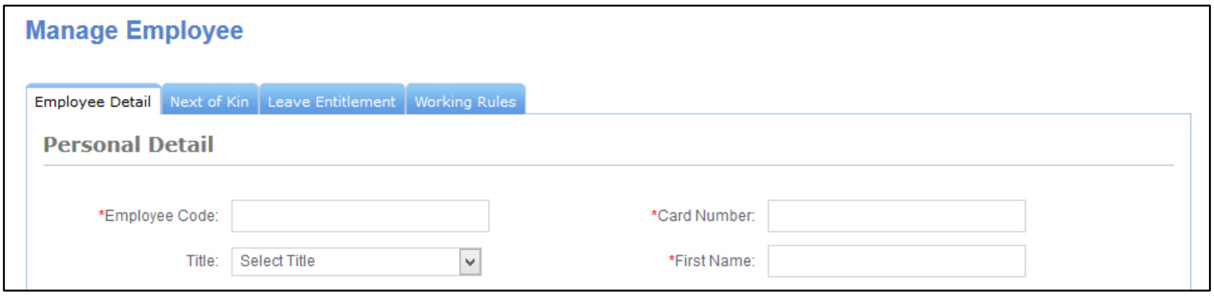


Fig 7

You can then enter the details for the employee. Please refer to the Employee File – Add Employee section on page xx for more information.

Add a Clocking

Clicking the Add a Clocking button will load the Add Clocking window (Fig 8).

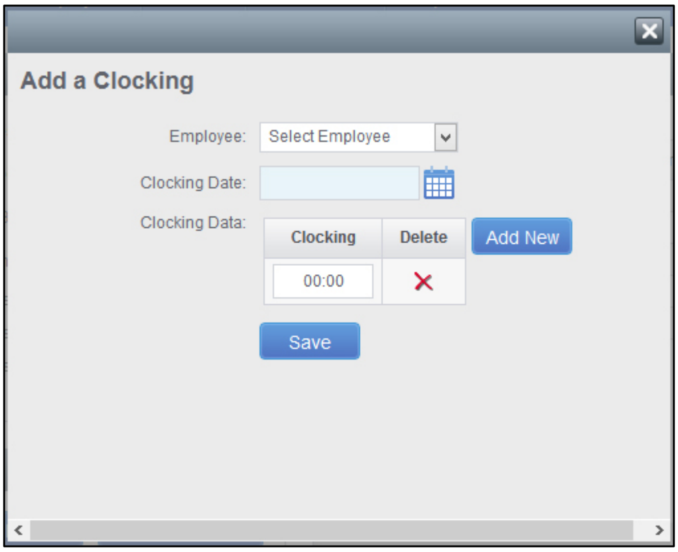


Fig 8

From the Employee drop down select the employee you wish to add a clocking for. Then set the date you wish to add the clocking on using the calendar icon next to Clocking Date.

Finally enter the clocking time in the box. If more than one clocking needs to be added for this day click Add New and second box will be added. Once you have entered the clocking click Save.

Add a Holiday

Clicking Add a Holiday will load the Manage Absence Booking window (Fig 9)

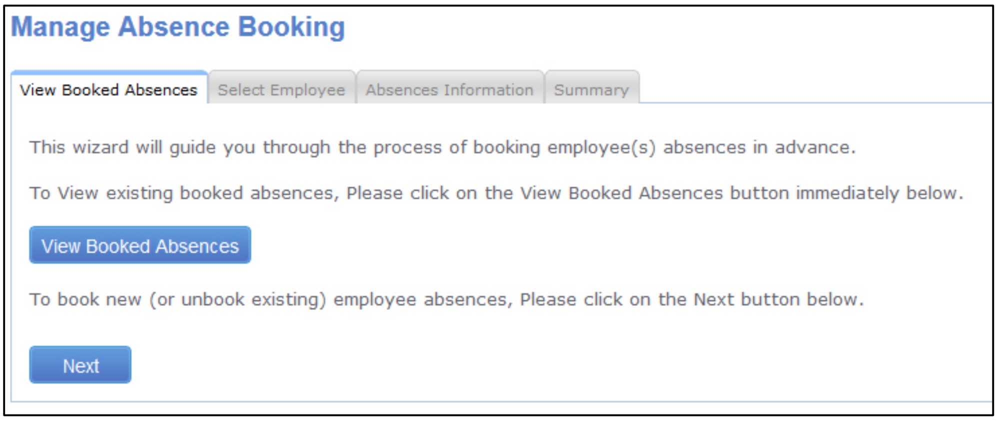


Fig 9

Click Next.

You will then be asked to select the employee. This can be done by typing in their employee number, selecting their department or company and then clicking Search. A list of all matching employees will be shown from which you can select the correct employee (Fig 10)

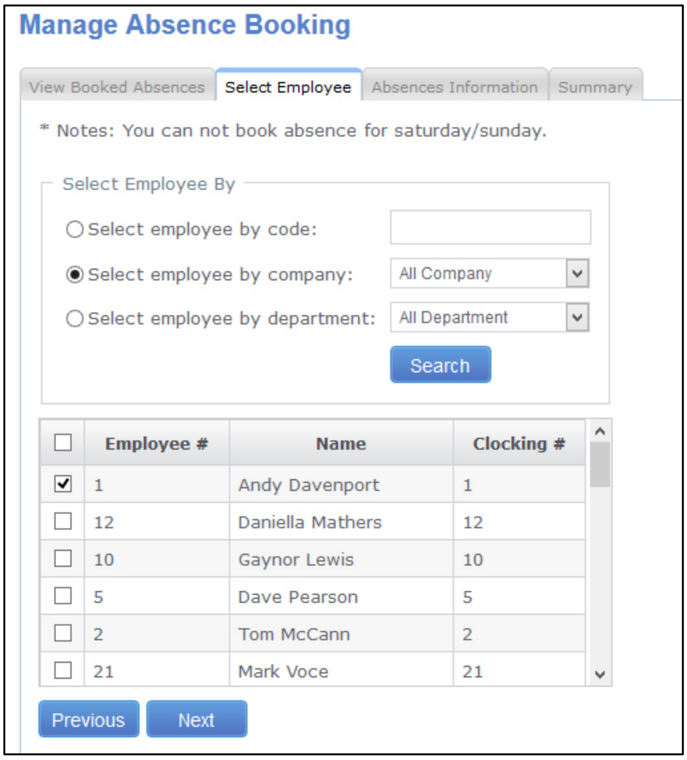


Fig 10

Once you have selected the employee click Next.

A new screen will load where you can select the type of absence to be taken and the date range (Fig11)

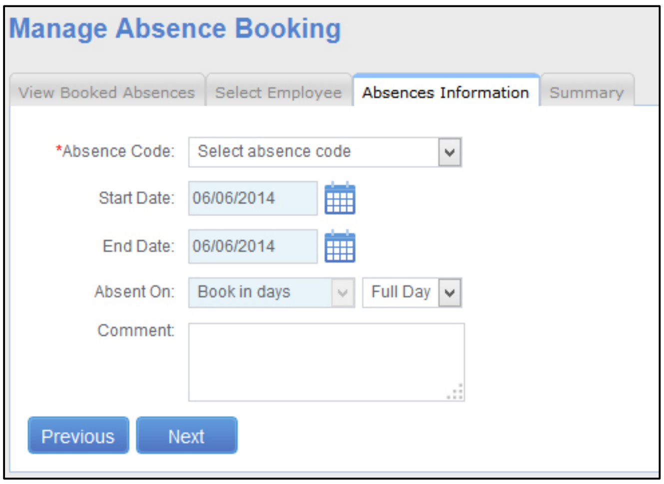


Fig 11

Click the drop down menu for Absence Code and select the correct code for this instance of leave.

User the calendar icon next to Start Date and End Date to select the start and end date of this instance (if one day the start and end dates should be the same).

Select whether this is a full or a half day instance of leave.

You can enter a comment about why this leave instance is been taken (i.e. the illness when the employee books sick)

Once you have entered these details click Next.

The Summary page will load (Fig 12).

Fig 12

If the leave booked effects the employee's leave entitlement then the summary will show the employees allocated leave, the total number of days taken so far and their remaining leave entitlement. A suggested number of booking days will also be shown, this can be amended should the number of days you wish to deduct from their remaining entitlement be different.

If you are happy with the settings for this booking click Book Absence. Otherwise click Previous to go back and amend the booking.

Employee File

The Employee File area of InfoTime is where you can Add, Remove and Edit your employee. You can assign employees to their Working Rule and setup their Leave Entitlements as well as managing basic human resources information such as their next of kin contact details.

To access the Employee File, select Employee – Employee from the top menu bar (Fig 1)

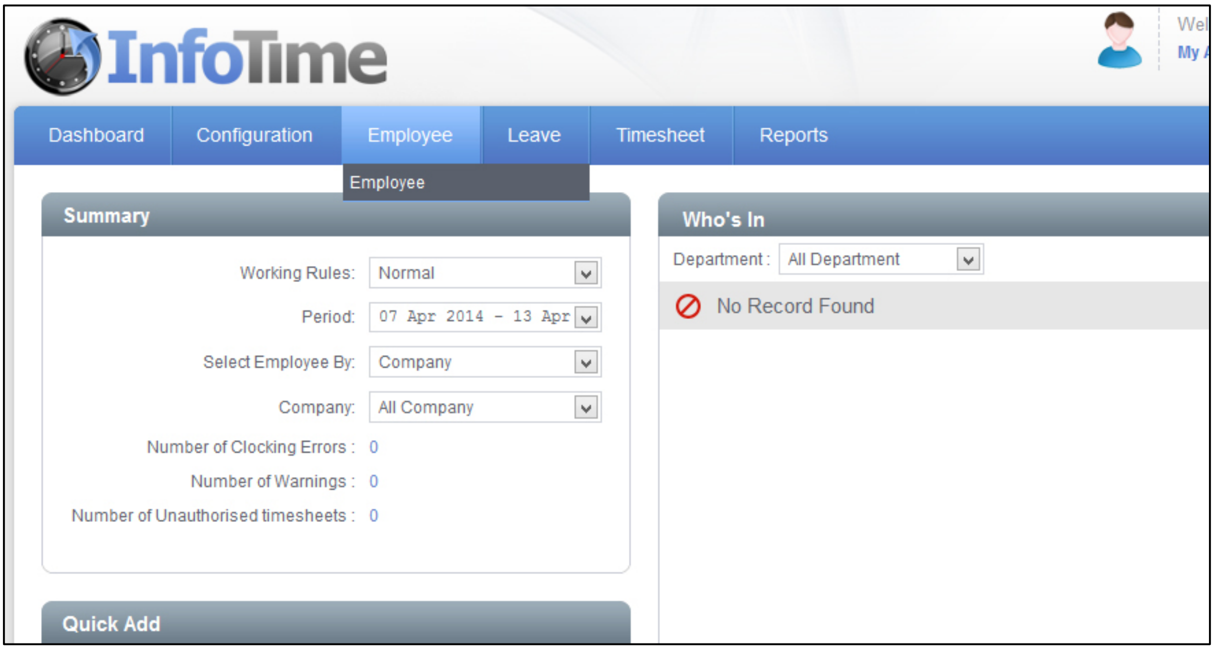


Fig 1

This will load the Employee File (Fig 2).

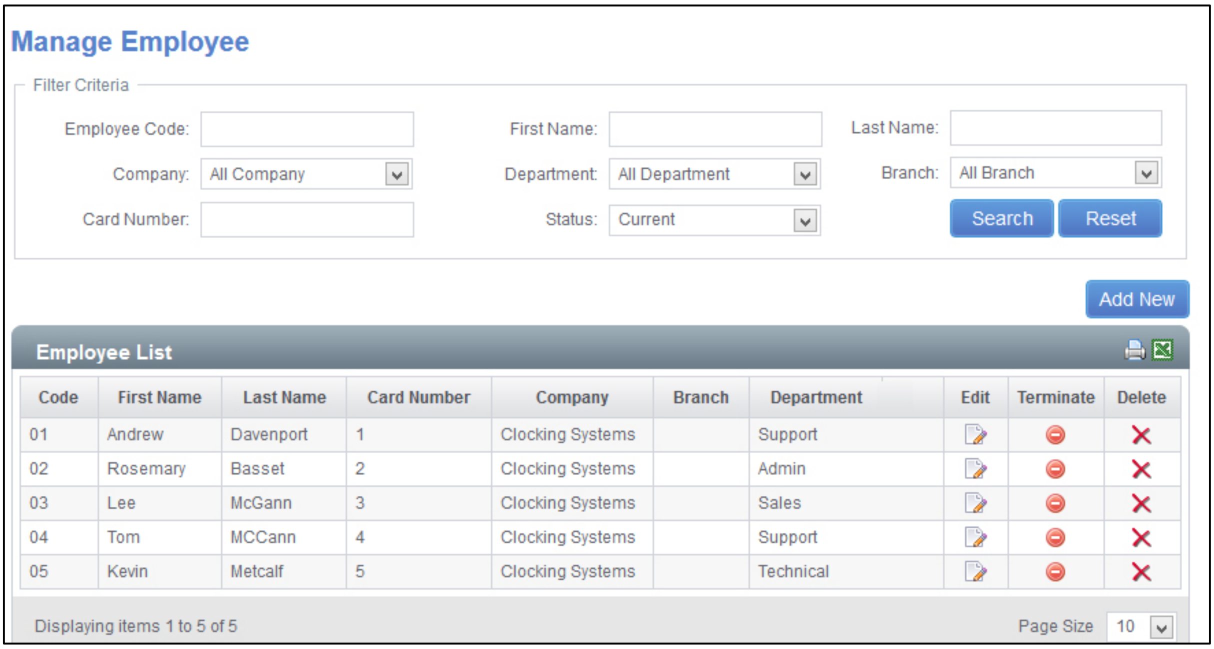


Fig 2

By default the screen will show all your current employees on screen. Using the Filter Criteria section at the top you can filter this list to only show a particular area of your company i.e. one department, or you can filter it to only show a particular employee by entering their name in boxes provided and clicking Search.

Similarly if you wish to see employees who have left you company, change the Status drop down box from Current to Terminated then click Search (selecting All instead of Terminated will show both current and previous employees in the same window).

Adding an Employee

To add an employee click the Add New button. The Add Employee screen will load (Fig 3).

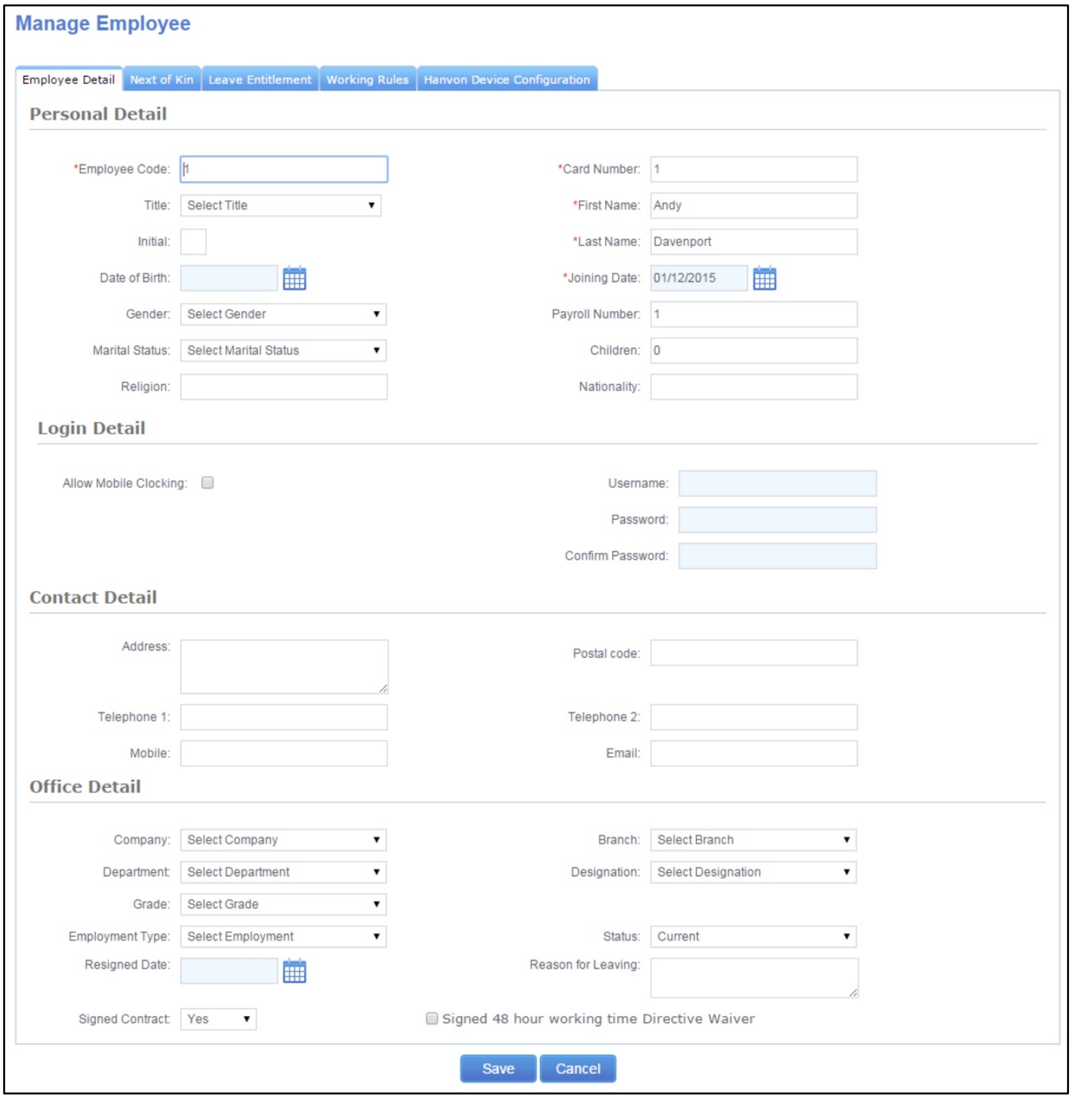


Fig 3

The information you can enter about an employee is broken into 4 separate pages; Employee Detail, Next of Kin, Leave Entitlement and Working Rules.

The majority of fields on these pages is optional however there are some that must be completed in order to add a new employee.

On the Employee Detail page you must fill in all the fields marked with a *. This means you must enter an Employee Code, Card Number, First Name, Last Name and Joining Date.

Then, if the employee is clocking in and out you must go to the Working Rules page and assign them a Working Rule. If the employee is only on the system so that you can record their employee details and will not be clocking then you do not need to assign a Working Rule.

Employee Details Field Definitions:

Employee Code*	A unique code for this employee, this could be their payroll number or some other number you use to refer to this employee.
Card Number*	When using a proximity card system this will be the number printed on the back of the card or fob issued to the employee. Where the terminal connected to the software uses some kind of biometric reader (i.e. facial recognition or a hand recognition) this will be the ID number the user is registered as on the terminal.
Title*	The employee's title i.e. Mr, Mrs, etc
First Name*	The employee's first name
Initial	The employee's initial
Last Name*	The employee's surname
Date of Birth	The employee's date of birth
Joining Date*	Using the calendar you can select the employee's start date, this does not have to be the exact date the employee started working for you company, but it must be the first day they clocked or earlier.
Gender	Male or Female
Payroll Number	The employee's number in your payroll software if different to the one entered as their InfoTime employee number. This number can then be used on the Sage Payroll Output csv file.
Marital Status	Is the employee married or single
Children	The number of children this employee has
Religion	What religion the employee is
Nationality	The employee's nationality
Address	The employee's postal address
Post Code	Post code for the address entered in the previous field
Telephone 1	A contact telephone number
Telephone 2	A second contact telephone number
Mobile	The employee's mobile number
Email	The employee's email address, this could be either a work or personal email address
Company	You can assign the employee to one of the companies you set up in the Classification section of the system.
Branch	You can assign the employee to one of the branches you set up in the Classification section of the system.
Department	You can assign the employee to one of the departments you set up in the Classification section of the system.
Designation	You can assign the employee to one of the designations you set up in the Classification section of the system.
Grade	You can assign the employee to one of the grades you set up in the Classification section of the system.
Employment Type	You can set what type of employee this is, i.e. full time, part time, agency. This field does not affect how they are paid
Status	Is a current employee or a terminated employee

Resigned Date	If the employee is marked as terminated this will hold their date they left
Reason for Leaving	You can enter their reason for leaving in this box
Signed Contract	A human resources field that allows you to track that this employee has signed a contract
Signed 48 hour working time Directive Waiver	A human resources field that allows you to track that this employee has a signed a waiver saying they are willing to work more than 48 hours a week if needed.

Once you have entered the required details on this page you can switch to the Next of Kin page (Fig 4).

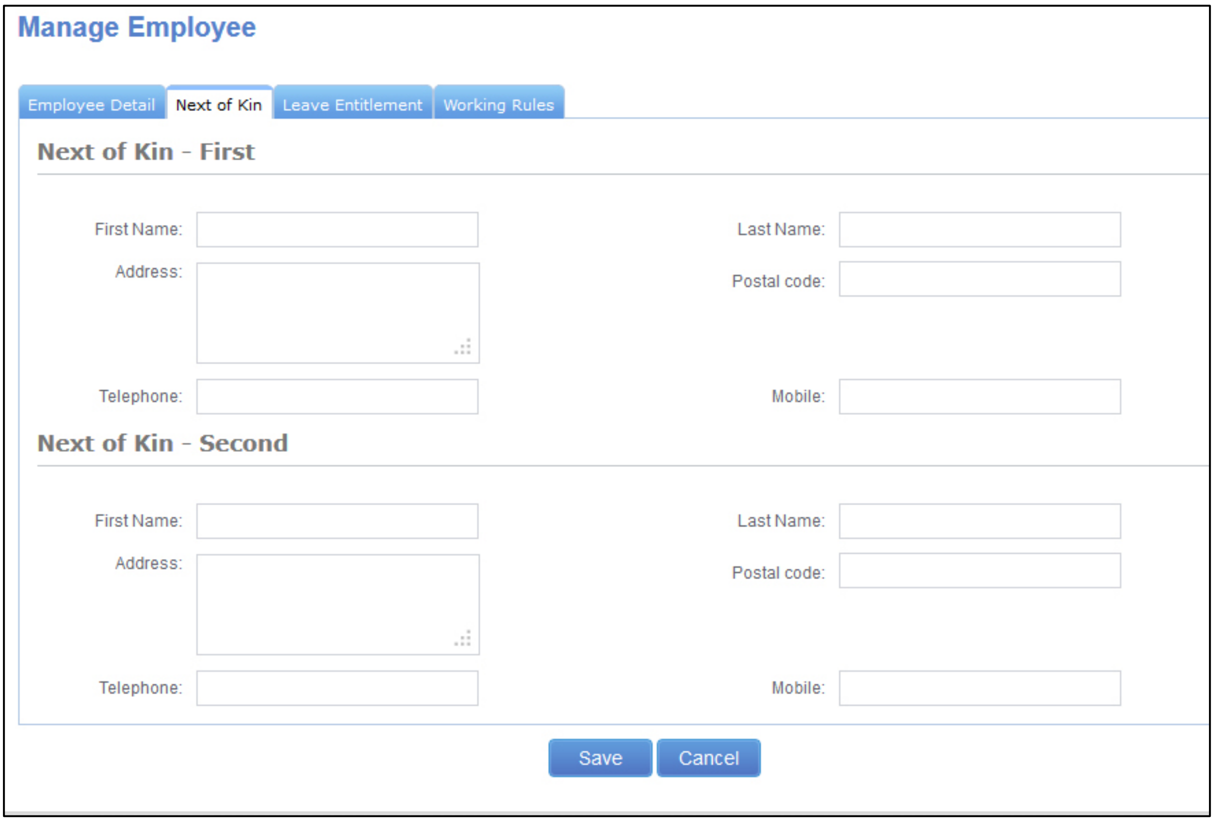


Fig 4

On this page you can enter the contact details for this employee's next of kin.

Each employee can have up to 2 Next of Kin contacts listed on the software, and all of their contract details can be entered, however all fields are option and can be left blank.

Once you have entered these details you can switch to the Leave Entitlement page (Fig 5)

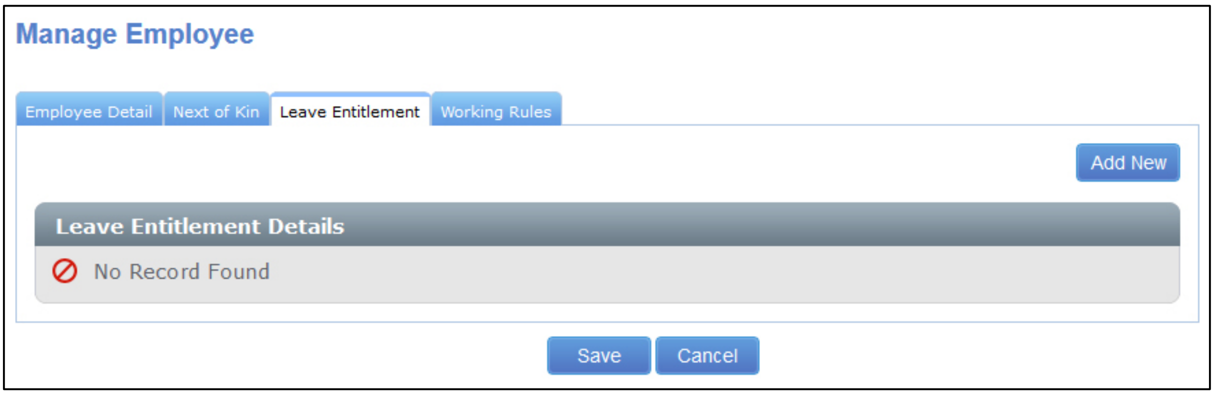


Fig 5

You can set the employee's Leave Entitlement for your leave cycle i.e. how many holidays they are entitled to over the year. To do this click Add New. An entry will be added in the Leave Entitlement Details table (Fig 6).

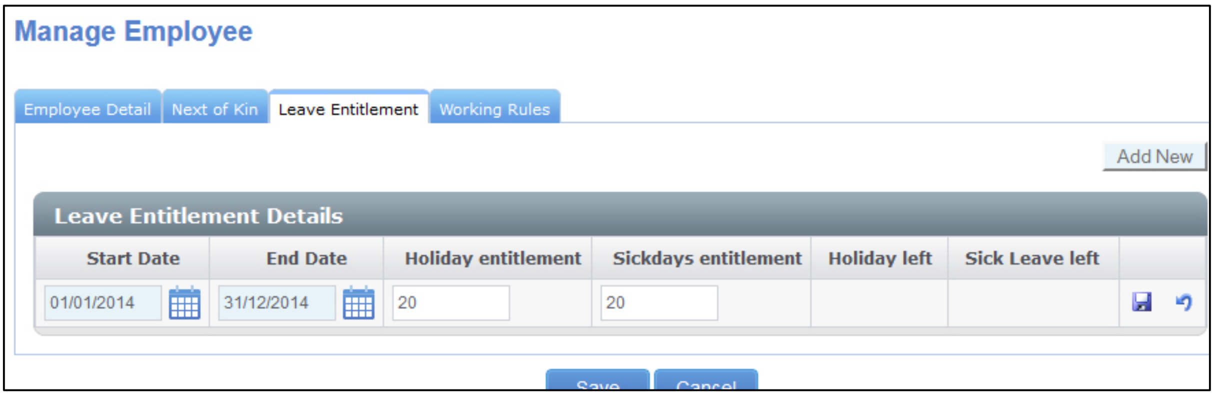


Fig 6.

In the Start Date you should enter the start of your leave cycle. In the End Date you should enter the end date of your leave cycle i.e. if you leave cycle was a year from the first of January the Start Date would be 01/01/14 and the End Date would be 31/12/14. In Holiday Entitlement enter the number of days holiday the employee is allowed in that leave cycle. In Sickdays Entitlement you can enter the number of sickdays the employee is allowed in the leave cycle, if the employee not entitled to any then leave this at 0. Click the floppy disk icon to save this entry. Once you have saved it the Holidays Left field will show the employee's remaining amount of leave for this leave cycle.

At the end of the leave cycle the system will automatically insert a new entry into this table with the giving the employee the same leave entitlements for the next leave cycle. i.e. in the example above, on the 1st January 2015 a new entry will be added with a Start Date of 01/01/15 and an End Date of 31/12/15.

Once you have entered the Leave Entitlement click on Working Rules to switch to the Working Rules page (Fig 7).

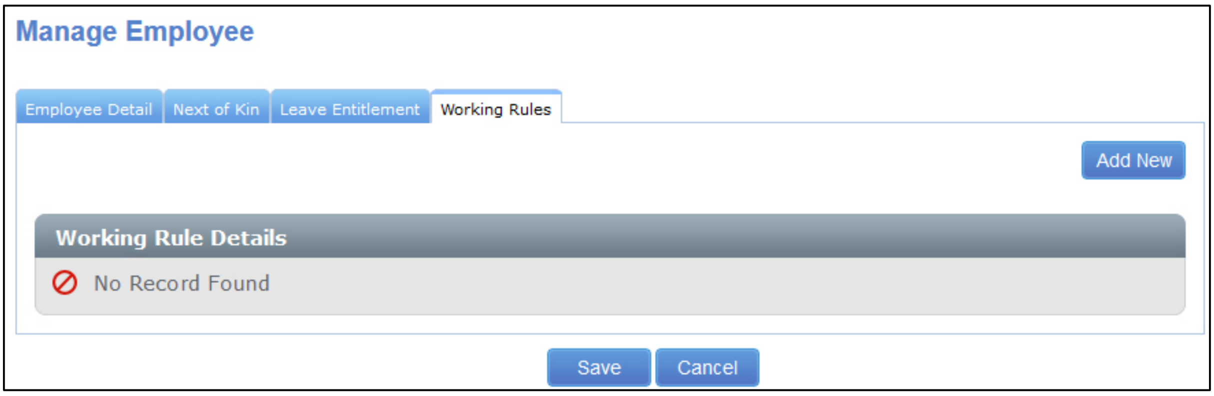


Fig 7

Working Rules control how an employee's hours are calculated by the system. Over time the rules used my change. When assigning a Working Rule you can set the from and to dates the rule is used. To assign a Working Rule to the employee click Add New. An entry will be added to the Working Rule Details table (Fig 8).

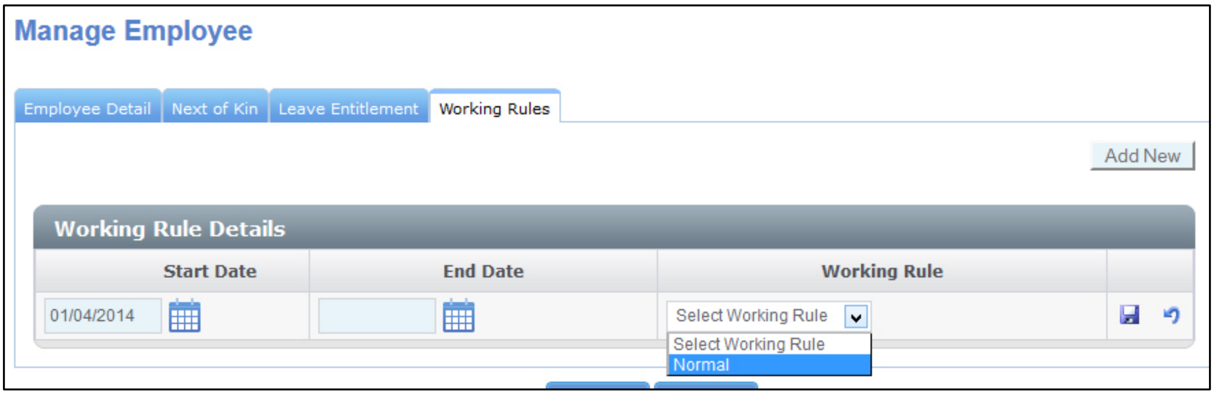


Fig 8

The Start Date should be set to the day the employee's hours will start being calculated using this rule i.e. for a new employee this would be their start date.

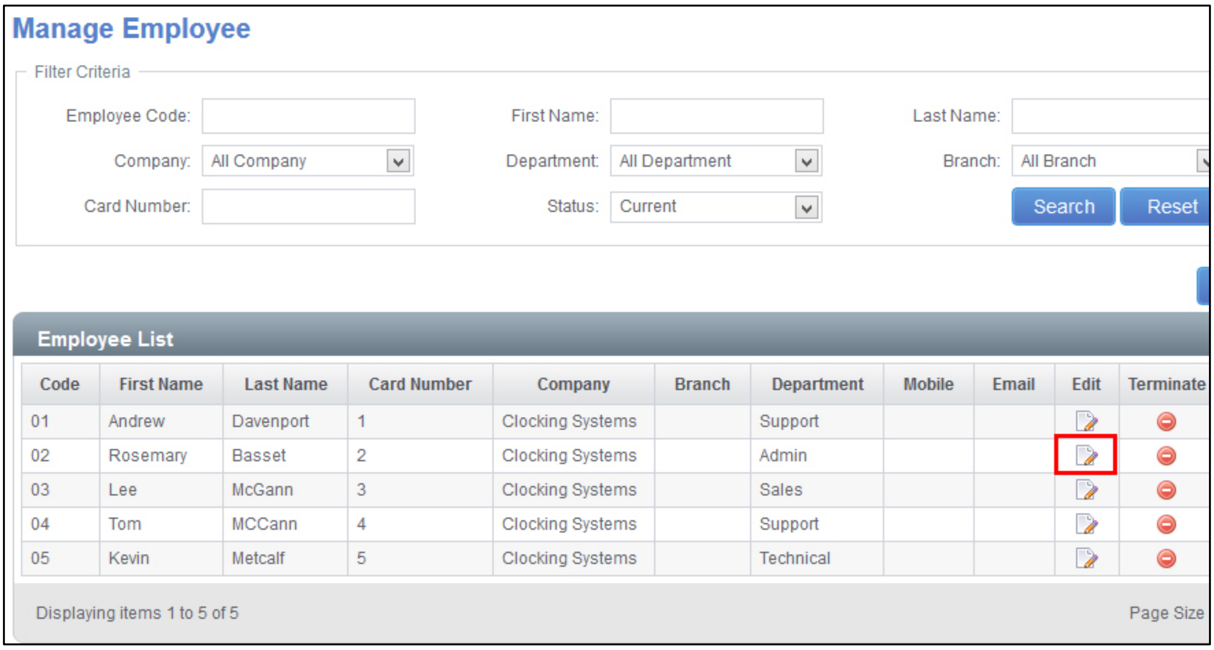
If the employee is on this Working Rule for a set period of time you can enter an End Date, if they will be on this Working Rule for an undetermined amount of time you can leave the End Date blank.

Select the correct Working Rule from the drop down menu and then click the floppy disk icon to save this entry.

Once you have entered these details click the Save button to save the new employee in the system.

Amending an Employee

Find the employee you wish to amend in the Employee List. Then click the icon that looks like a piece of paper and a pencil under the Edit column (Fig 9)



Code	First Name	Last Name	Card Number	Company	Branch	Department	Mobile	Email	Edit	Terminate
01	Andrew	Davenport	1	Clocking Systems		Support				
02	Rosemary	Basset	2	Clocking Systems		Admin				
03	Lee	McGann	3	Clocking Systems		Sales				
04	Tom	MCCann	4	Clocking Systems		Support				
05	Kevin	Metcalf	5	Clocking Systems		Technical				

Fig 9

A screen will load showing the employee's information (Fig 10).

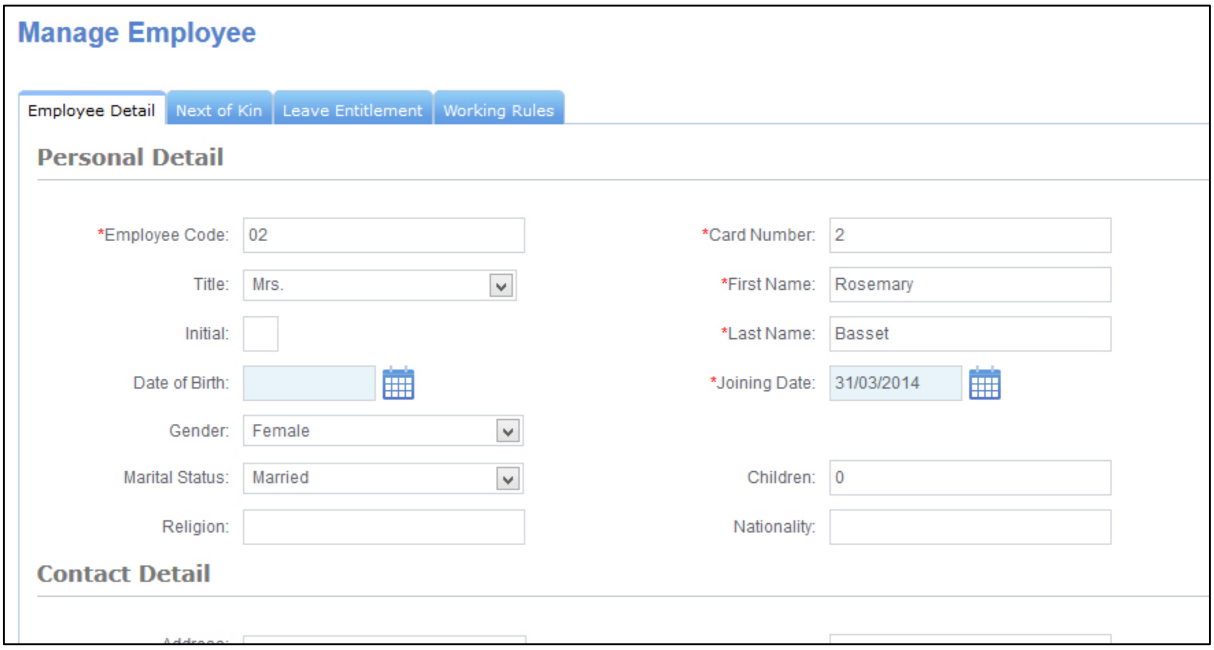


Fig 10

You can then change any of the details as needed. The only field you will not be able to change is the Employee Code.

Once you have made the required changes click the Save button.

Removing an Employee

On the Employee List locate the employee you would like to remove. Then click the No Entry symbol shown under the Terminate Column (Fig 11)

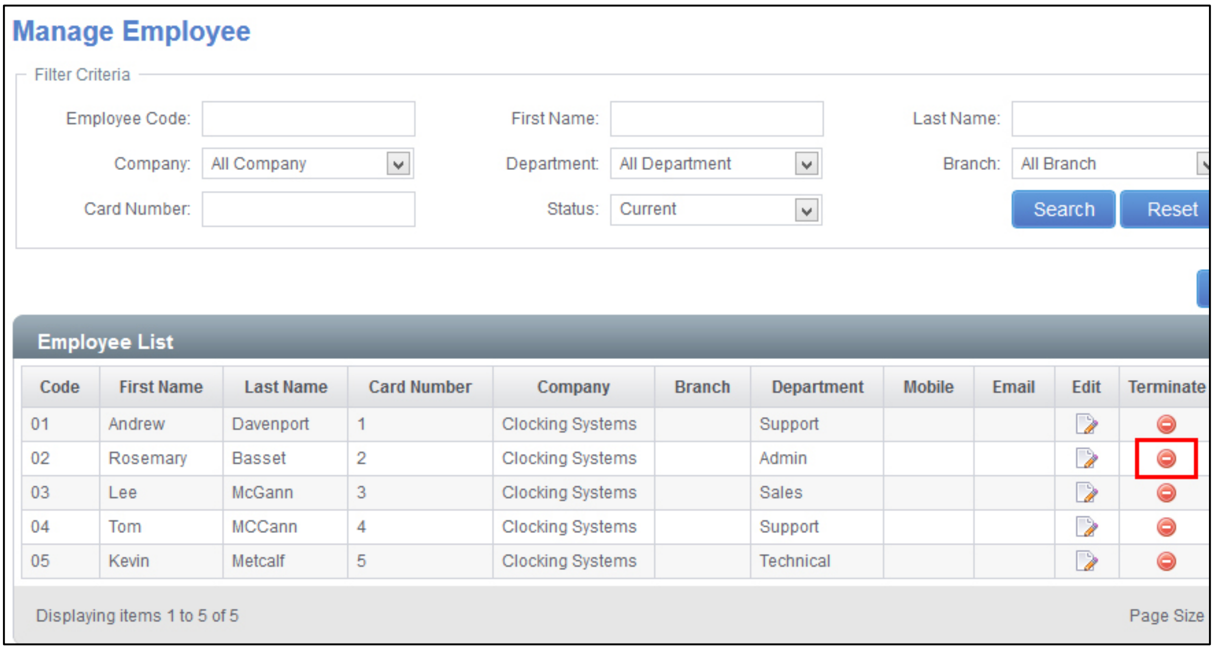


Fig 11

A window will pop up asking you to confirm you wish to terminate this employee (Fig 12).

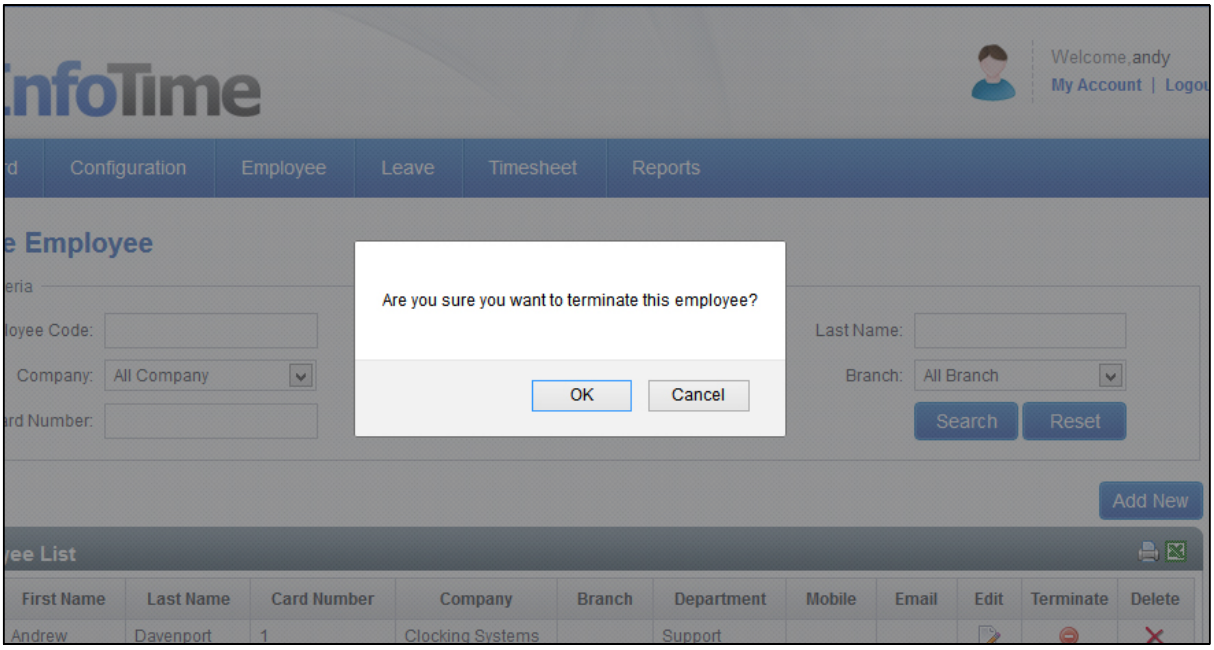


Fig 12

Click Yes, the employee will be marked as terminated and they will disappear from the active list.

Schedule Planner

The Schedule Planner is where an employee's shift start and finish times can be entered. This can be used to schedule employees to start and finish at different times each time they work, or you can build a rota into the system that repeats after a set time period i.e. a shift pattern. The Scheduled start and finish time is what InfoTime uses to generate the employee warnings for late arrival and late departure.

To access the Schedule Planner click on Timesheet – Schedule Planner (Fig 1).

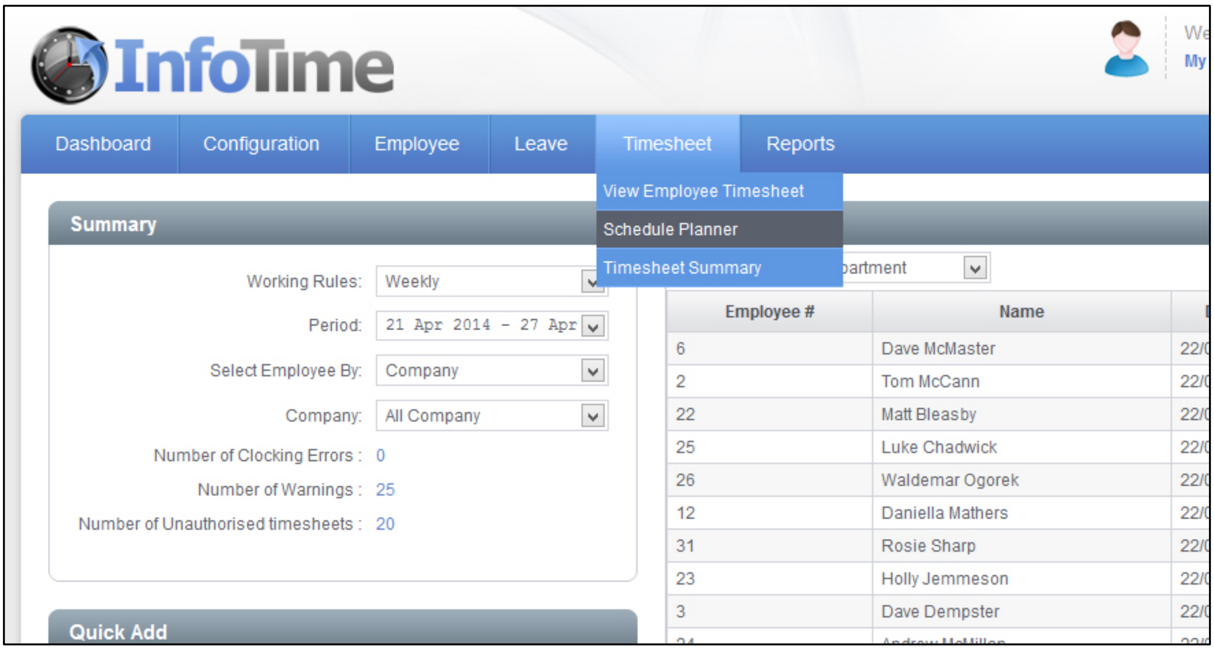


Fig 1

The Schedule Planner screen will load. Initially only show the filter criteria (Fig 2)

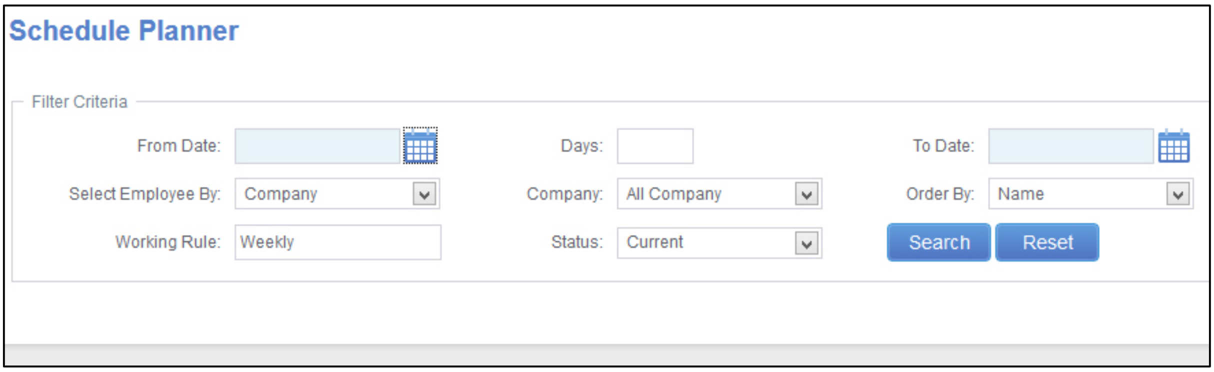


Fig 2

The first thing you need to do is set the date range you wish to see. You can set the date range to be as long as you require i.e. if you are entering a roster for this week just select this week, if you are entering a pattern that repeats every three weeks set the date range to show the three weeks. It is advisable to set the From Date as the first day of the pattern and then the To Date to the last day of the pattern.

You can also set the filter to only show employees in a particular Department, Company, etc. Once you have set the criteria click the Search button.

The screen will refresh to look like Fig 3.

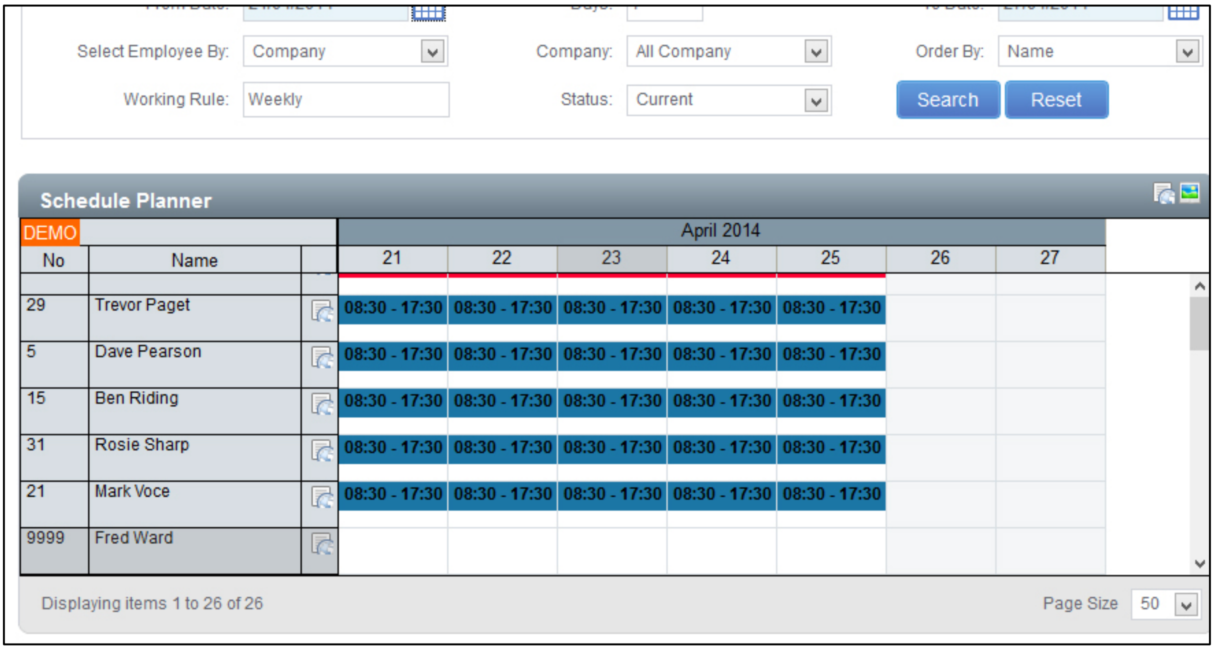


Fig 3

Building a Rota

To enter a schedule on a particular day, locate the employee and right click on the day you wish to set a start and finish time for, a menu will load (Fig 4).

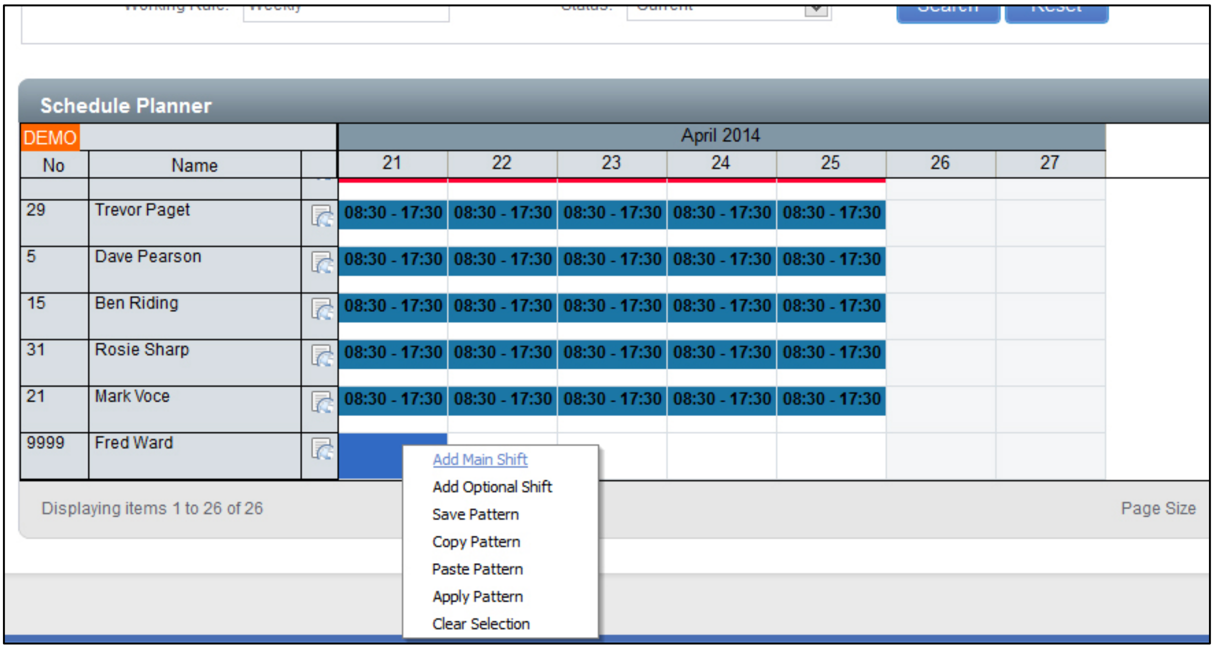


Fig 4

From the menu select Add Main Shift.

The Manage Shift Schedule Wizard will load (Fig 5).

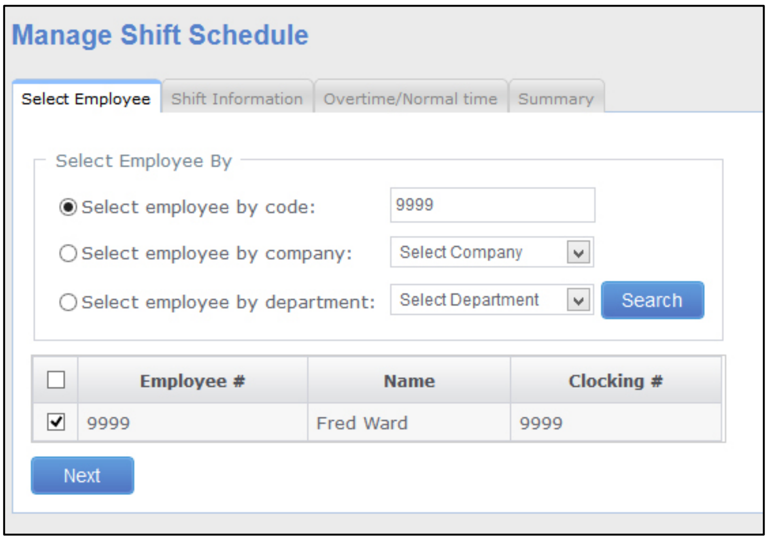


Fig 5

The screen confirms which employee you have selected. Click Next.

The next screen details the Shift Information such as Start Time and End Time (Fig 6).

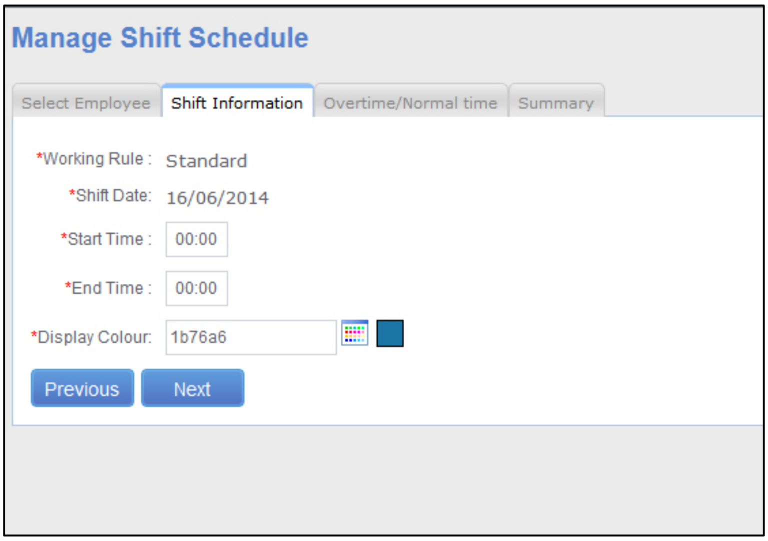


Fig 6

Enter the Start Time and End Time in 24 hour format. For the Display Colour click the colour selection tool to the right of the box containing the colour code, you can then pick the colour displayed on the schedule planner from the list of available options.

Click Next

A summary will then be displayed giving details of the schedule you have entered (Fig 7). If you are happy with the settings click Save to add the schedule. Otherwise click Previous to go back and amend the shift.

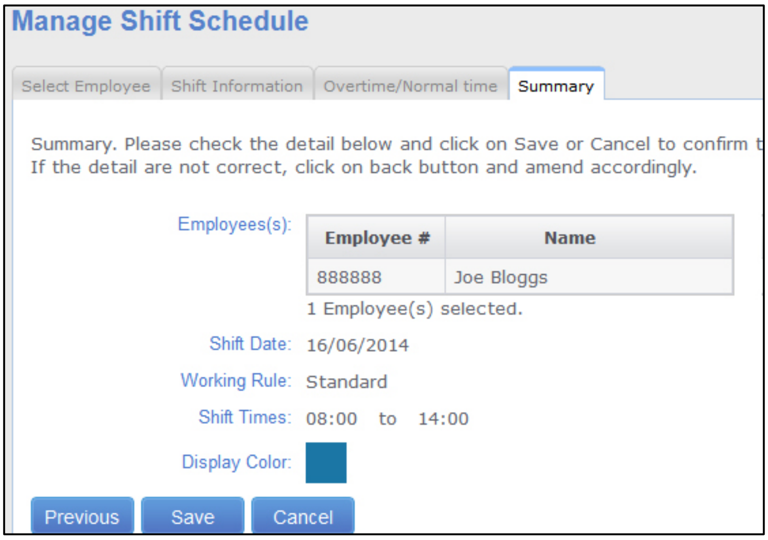


Fig 7

Follow the same steps to enter the schedules for the other working days on the rota.

By default this rota will be only applied to the employee on the days you have scheduled above. If the employee works this pattern repeatedly (i.e. a 2 week repeating rota) the rota can be saved and then the employee will be assigned to this shift until you tell the system otherwise. Similarly if another employee also works this pattern the save pattern can be applied to them also.

Saving a Pattern

In the Schedule Planner locate the employee who's pattern you wish to save. Left click on the white space underneath the first applied shift of the pattern, the box will change to blue. With the left mouse button held down drag the mouse point across all of the days in the pattern, all of the days will highlight in blue (Fig 8).

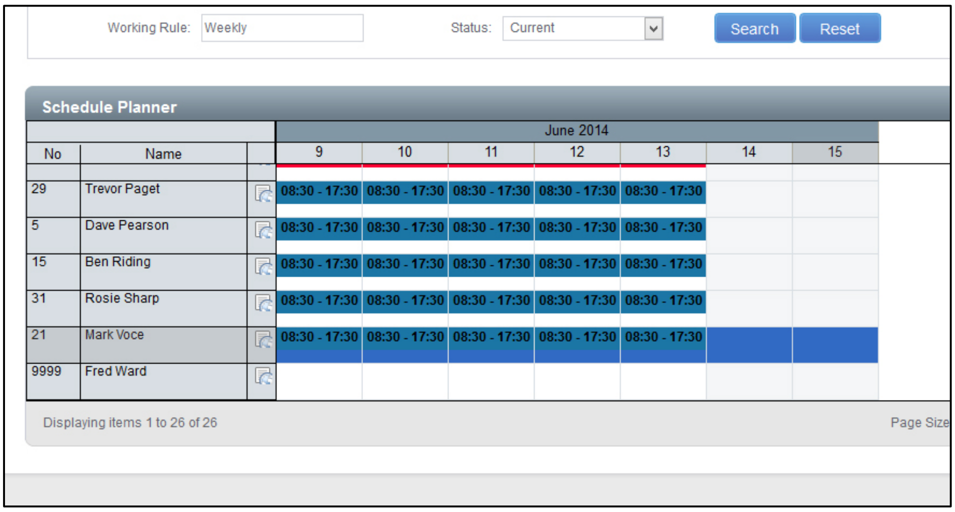


Fig 8

Right click on the blue area of any of the days and a menu will load (Fig 9).

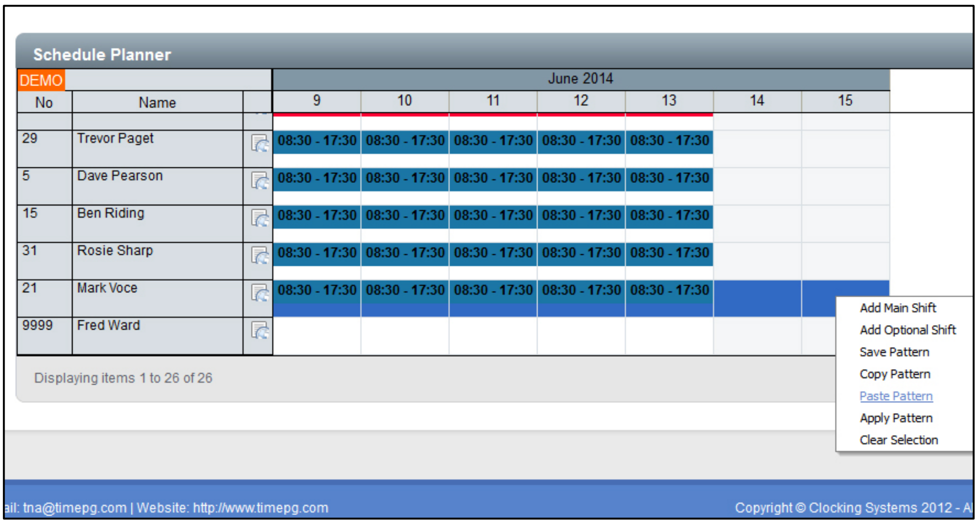


Fig 9

From the list of options select Save Pattern. You will be asked to enter a name for this Saved Pattern (Fig 10).

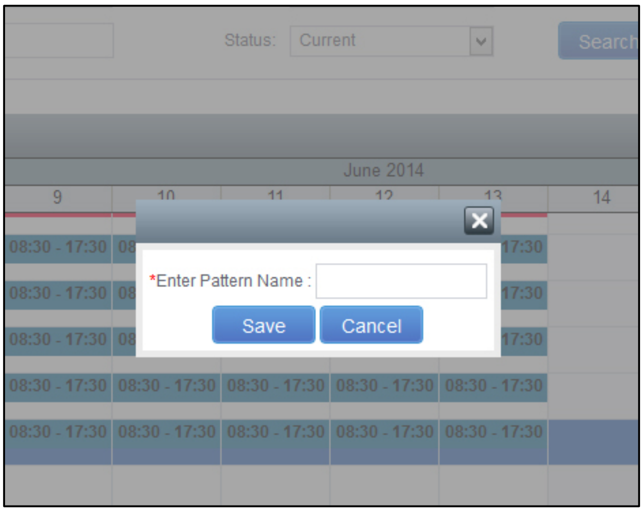


Fig 10

Enter a name for this pattern than means something to you (i.e. the working hours) and click Save.

Applying a Pattern

A Saved Pattern can be applied to any employee. When a pattern is applied it can be applied to the employee for as long as you want. To apply a pattern, first locate the employee on the Schedule Planner.

Once you have located the employee, right click on the day you want pattern to be applied from. A menu will load (Fig 11)

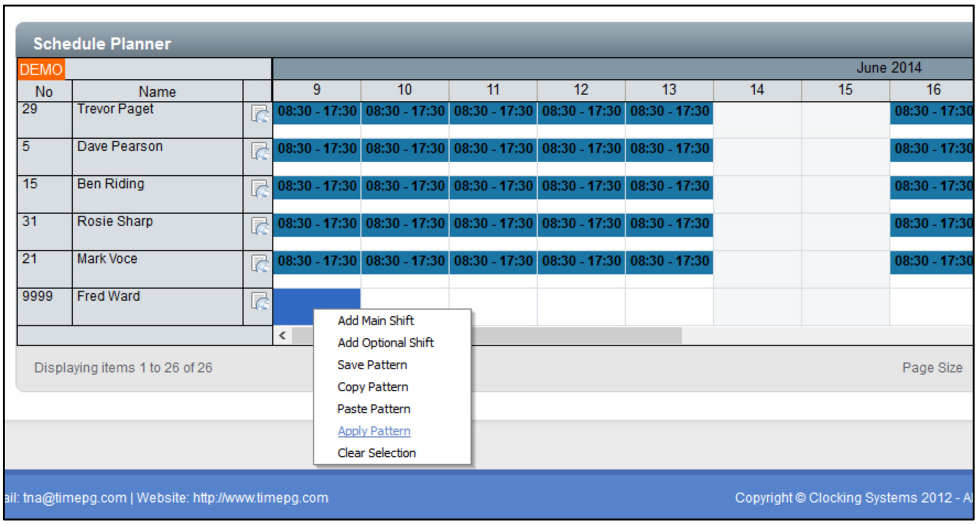


Fig 11

Select Apply Pattern. A new screen where you can select the pattern to be applied (Fig 12)

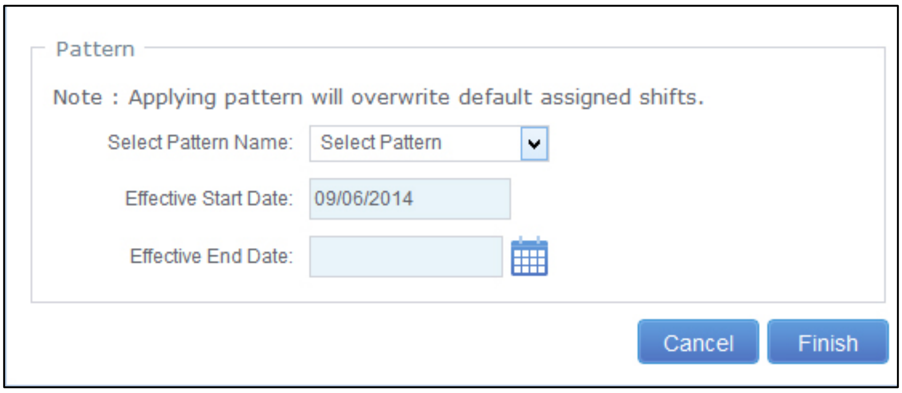


Fig 12

Click the drop down menu for Select Pattern Name and select the name of the pattern you want to apply to this employee.

The Effective Start Date will be set to the date you selected on the Schedule Planner. On the Effective End Date you can click the calendar icon to select the date to apply this pattern until. If this employee is staying on this pattern for the foreseeable future then leave this field blank.

After entering these details click Finish.

Emailing Rota's to Employees

Once rotas have been entered into the system it is possible to email them directly to the relevant staff members. To be able to send an email to an employee email connection details must be entered in the System Settings page of the software. An email address must also be entered into the Email Address field of the Employee Details. From the Schedule Planner screen set the Filter criteria to show the employees and date range that the rotas are to be sent out over (i.e. if sending rotas for 24/04/17 – 30/04/17 for the admin department, set the

From Date to 24/04/2017 and the To Date to the 30/04/2017, change the Select Employee By option to Department, change the Department option to admin (Fig 13) and then click Search.

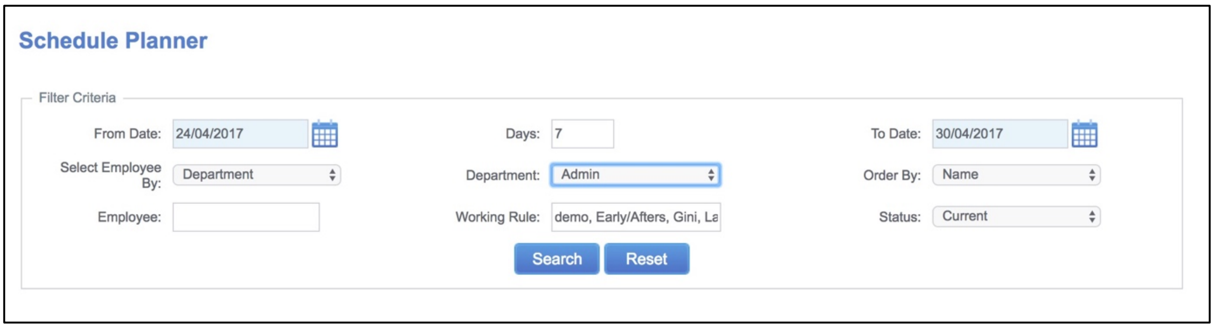


Fig 13

The Schedule Planner will refresh to show the selected information. At the top right hand side of the Schedule Planner are a number of different icons, the first icon on the left of these options is the Publish Rota's button (highlighted by a red square in Fig 14). Clicking this button will send an email to the displayed employee's giving them a list of the shifts they are rostered to work over the date range.

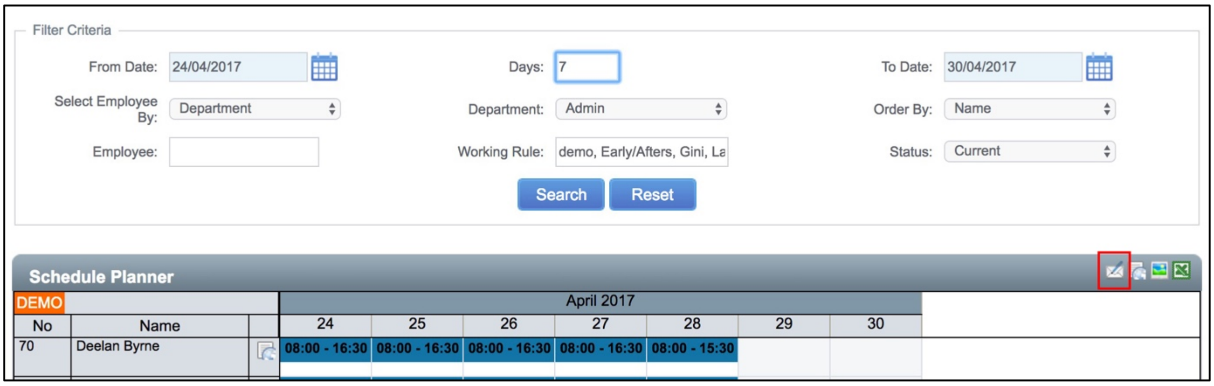


Fig 14

A dialog box will load listing any employees who do not currently have an email address entered into their employee file. It is possible to proceed with sending the emails at this point but the listed employees will not be sent their rotas.

If the rotas are edited at a later point it is possible to resend the email by loading the data on screen once more and clicking the same icon.

Viewing Employee Hours & Clockings

There are two screens in InfoTime that show information relating to your employees' hours and clockings, the Timesheet Summary screen and the Employee Timesheet screen. The Timesheet Summary is a summary of the hours worked by each employee over a pay period while the View Employee Timesheet shows a detailed day by day break down for the each individual employee, allowing you to see the hours they have worked and their clocking times.

Employee Timesheet

To access the Employee Timesheet screen select Timesheet – View Employee Timesheet (Fig 1)

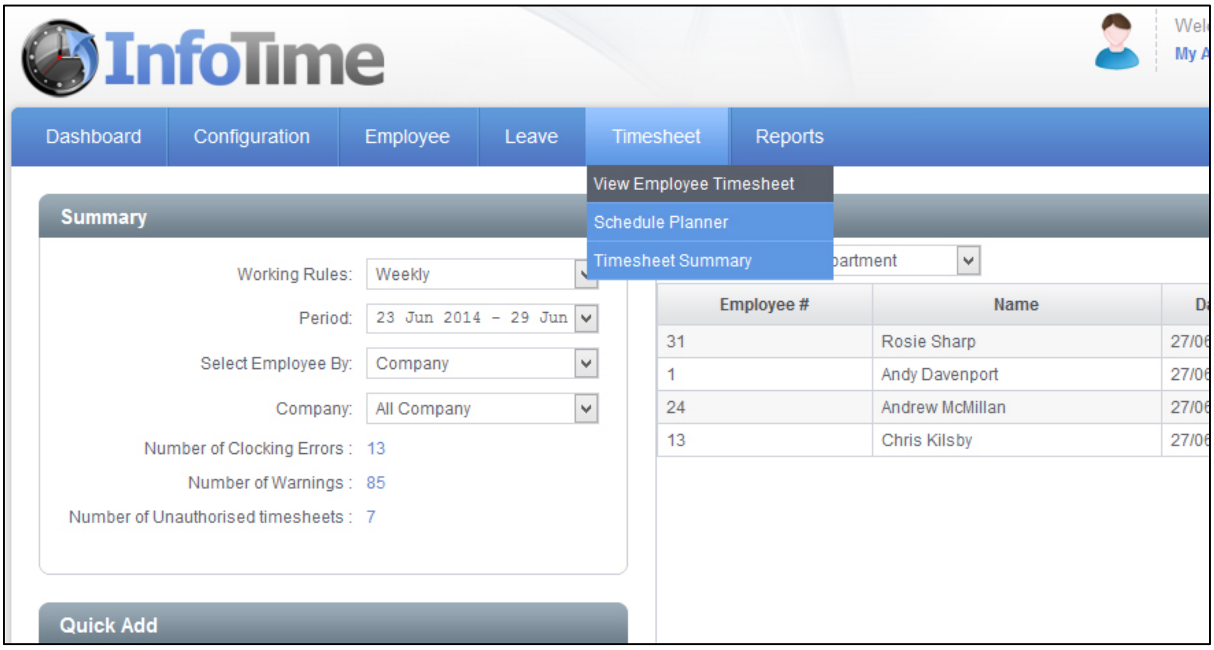


Fig 1

The Employee Timesheet screen will load (Fig 2)

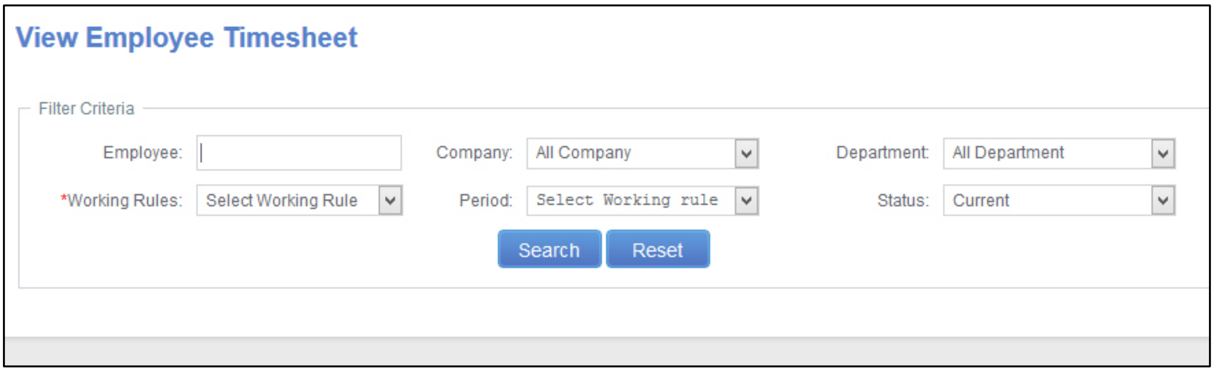


Fig 2

You can use these settings to determine which employees and which pay period you wish to with to look at. Set the Working Rule and the Period and then click Search.

The screen will refresh and the Timesheet for one employee will load (Fig 3).

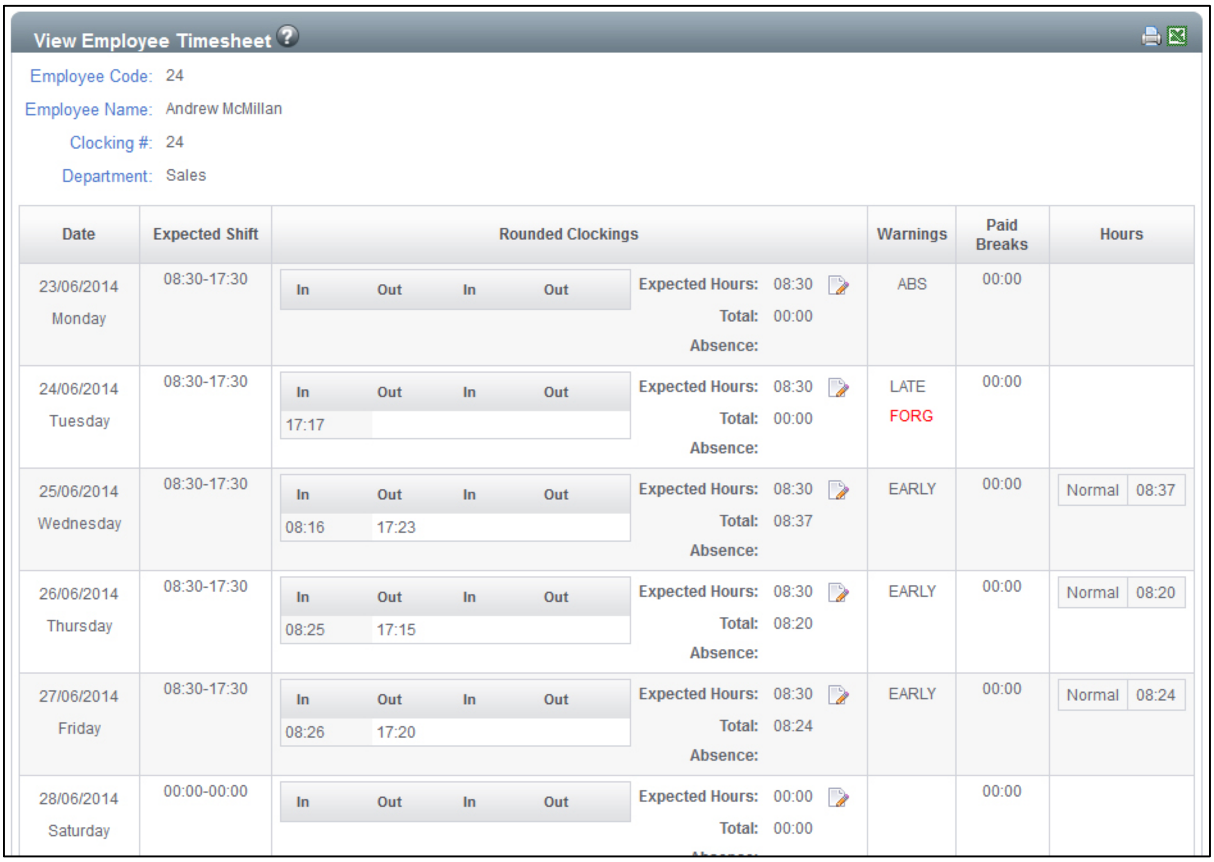


Fig 3

On the timesheet an entry will be made for each day of the Pay Period. In this entry you will see the Expected Shift, the Clockings, any warnings, any paid breaks and then the total hours worked split into the different time categories.

At the bottom of the screen you can cycle through the employees using the arrow keys.

By default the clockings shown are the rounded clockings, it is possible to show the actual clockings made by the employee. At the top of the timesheet is a View Criteria section (Fig 4)

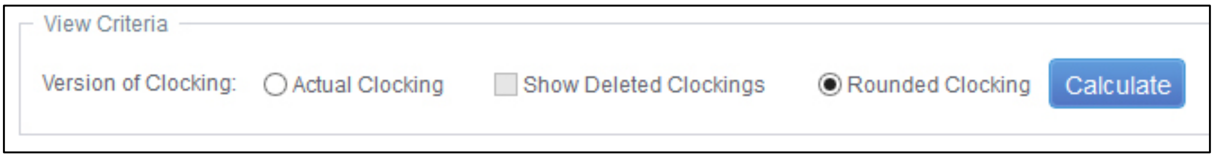


Fig 4

Clicking on the Actual Clockings will show you the time the employee actually clocked in at the terminal.

You can use this screen to Add, Amend and Delete clockings for your employees.

Adding a Clocking

Locate the employee the timesheet for the employee you need to add a clocking for.

Once you are viewing the timesheet, locate the day where the clocking is to be added and click the Edit Clockings button (highlighted in Fig 5)

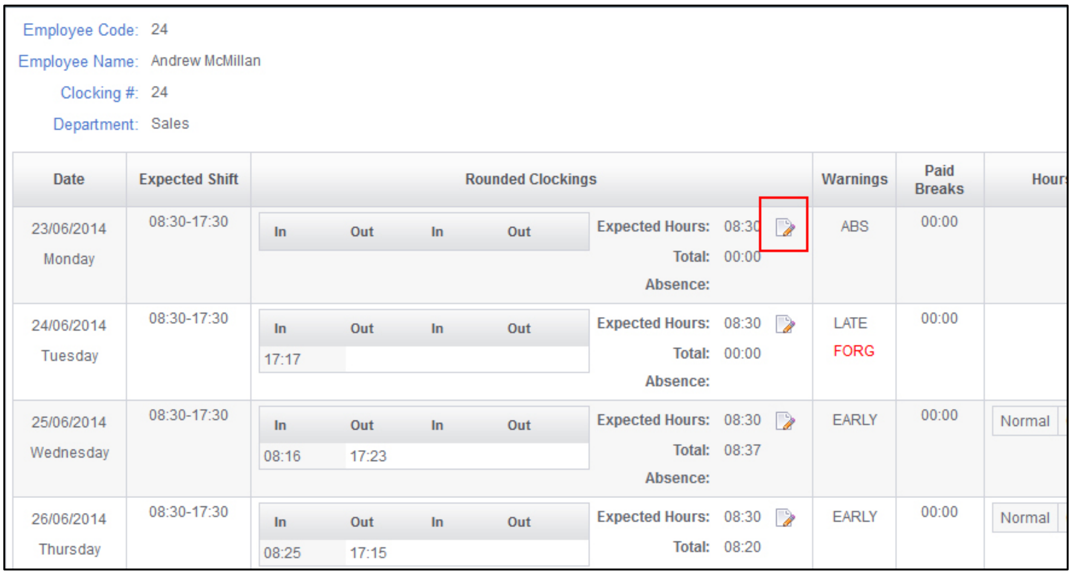


Fig 5

The Manage Clocking Data screen will load (Fig 6)

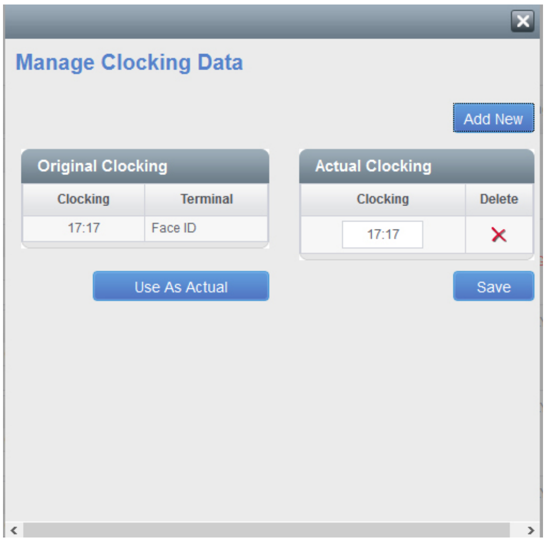


Fig 6

On this screen the Original Clockings on the left are the clockings made by the employee at your clocking terminal. The Original Clockings cannot be amended and adjusted in any way. The Actual Clockings on the right hand side are the same as the Original Clockings but you can add clocking, delete clockings and amend clockings.

Click the Add New button.

A new cell will be added in the Actual Clockings section with the time set to 00:00. The time of the clocking to be added can by typed into this box.

If you need to add another clocking on the same day then clicking Add New again will create another cell. Once you have added all the clockings or that day click Save.

The system will then recalculate the employee's hours for that day taking into account the new clocking.

Amending a Clocking

Locate the employee the timesheet for the employee you need to amend a clocking for.

Once you are viewing the timesheet, locate the day where the clocking is to be amended and click the Edit Clockings button (highlighted in Fig 7)

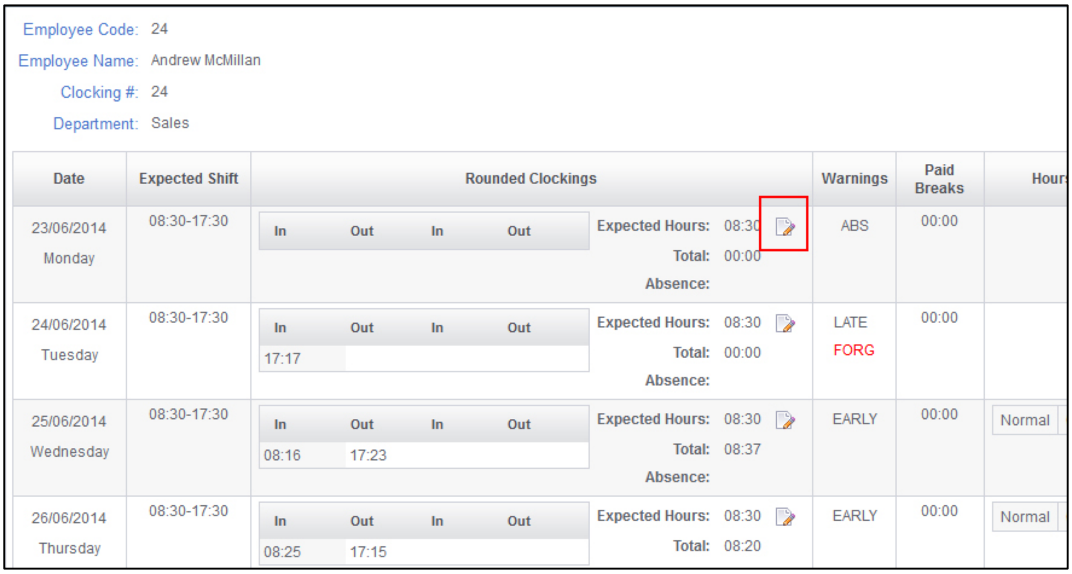


Fig 7

The Manage Clocking Data screen will load (Fig 8)

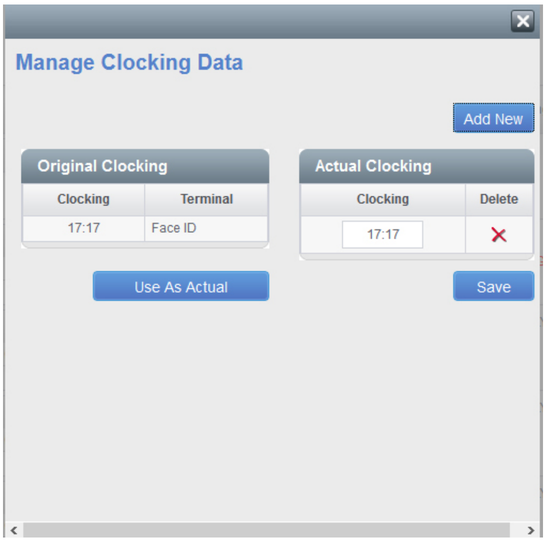


Fig 8

Under the Actual Clockings section click into the cell for the clocking to be amended. You can then overtype the time.

Once you have amended the clocking click Save, the system will then recalculate the employee's hours automatically.

Removing a Clocking

Locate the employee the timesheet for the employee you need to remove a clocking for.

Once you are viewing the timesheet, locate the day where the clocking is to be removed and click the Edit Clockings button (highlighted in Fig 9)

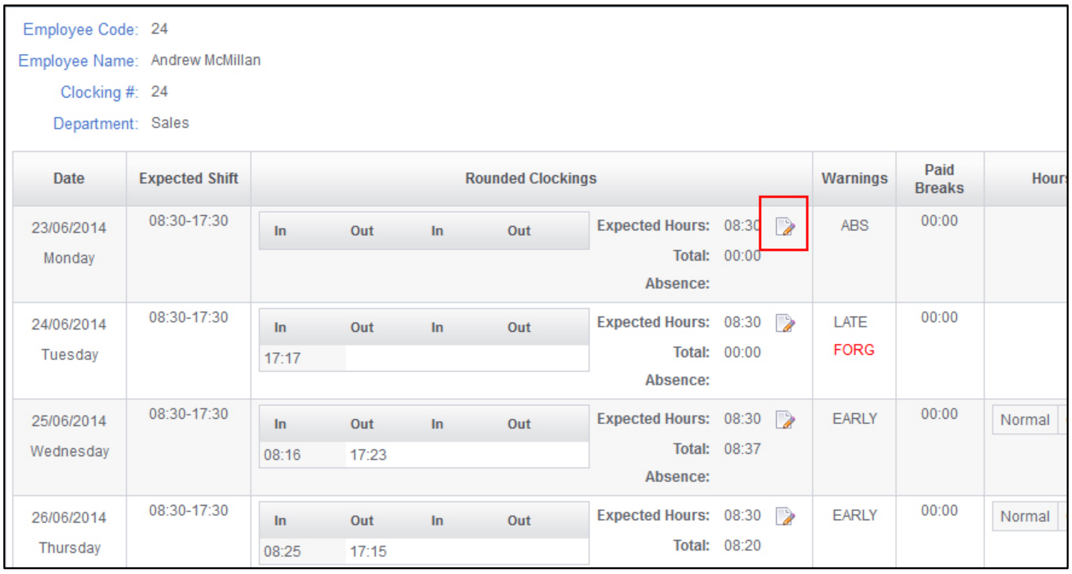


Fig 9

The Manage Clocking Data screen will load (Fig 10)

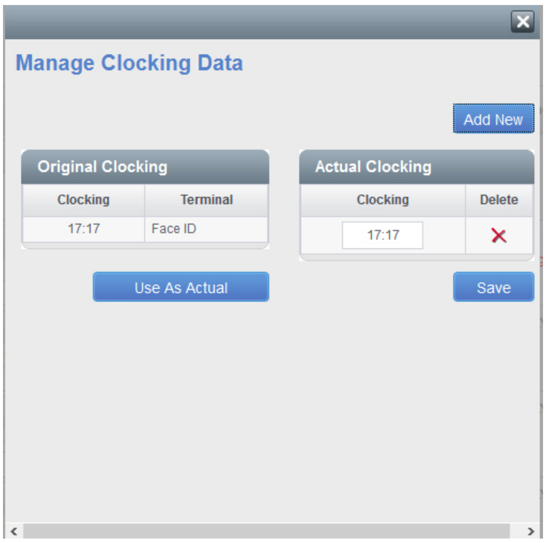


Fig 10

Under the Actual Clockings section locate the clocking to be deleted and then click the x next to it. The clocking will then be removed from the Actual Clockings section (it will still show in the Original Clocking). Click the Save button, the system will recalculate the employee's hours for that day and then revert to showing the employees timesheet.

Timesheet Summary

To access the Timesheet Summary select Timesheet – Timesheet Summary (Fig 11)

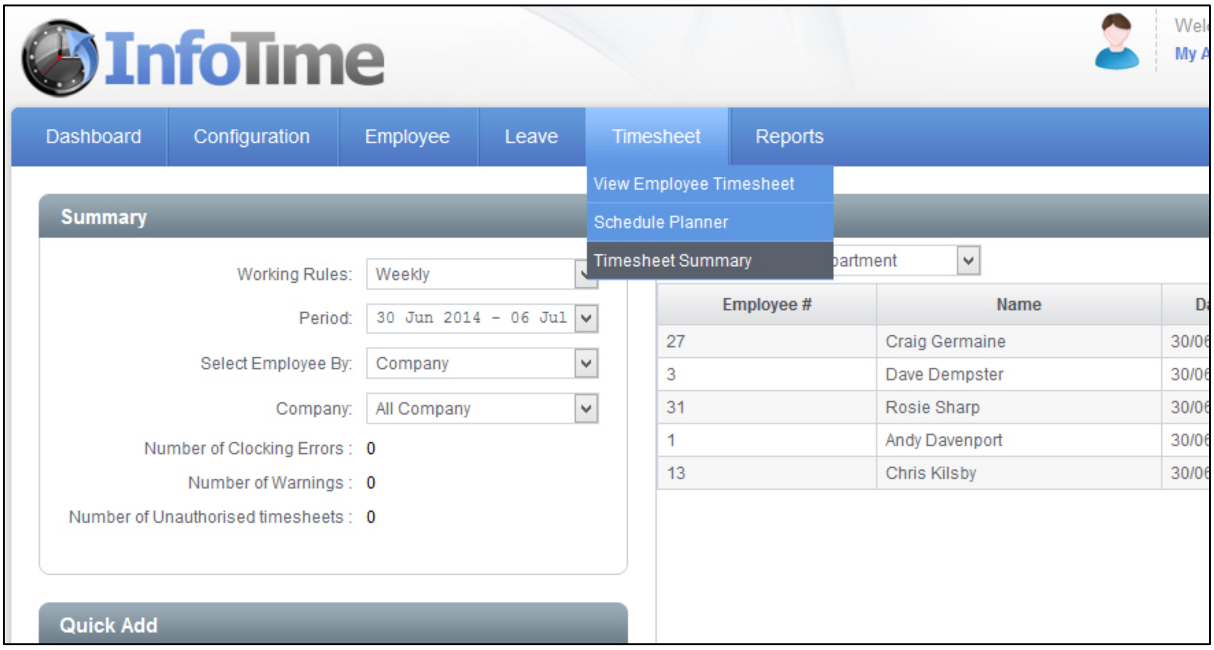


Fig 11

The Timesheet Summary screen will load (Fig 12)

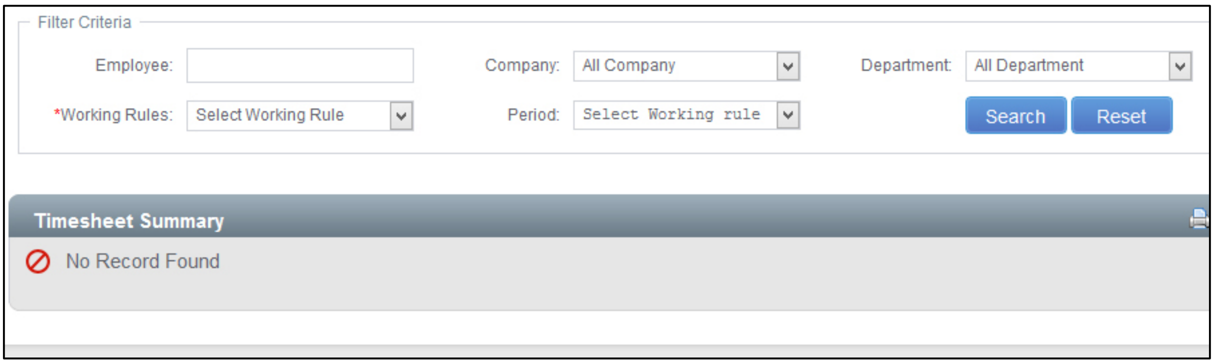


Fig 12

You can use these settings to determine which employees and which pay period you wish to with to look at. Set the Working Rule and the Period and then click Search.

The screen will then refresh to show the timesheet summaries for all the selected employees (Fig 13)

Timesheet Summary

Card Number	Employee Code	Employee Name	Normal	Overtime	Total Hours	Edit	Status
24	24	Andrew McMillan	25:21		25:21		
1	1	Andy Davenport	27:13		27:13		
13	13	Chris Kilsby	29:39		29:39		
3	3	Dave Dempster	08:34		08:34		
22	22	Matt Bleasby	04:15		04:15		
31	31	Rosie Sharp	33:47		33:47		

Displaying items 1 to 6 of 6 Page Size 10

Fig 13

The Timesheet Summary shows a one line entry per employee showing the total hours worked for the selected pay period. It shows a total for each time category as well as the total hours worked.

Clicking the Edit button on an employee's summary will load the employee's Timesheet for that period.

The Status section at the right hand side allows department supervisors to authorise employee timesheets once they have reviewed them. This is not mandatory and will not stop the employee appearing on reports if not used. To authorise the timesheet for an employee the user would click the Tick under that employee's Status.

InfoTime

Leave Planner

The Leave Planner allows you to view the instances of holiday and sickness for your employees over a date range. You can also add and remove instances of leave from the screen.

To access the Leave Planner Select Leave – Leave Planner (Fig 1).

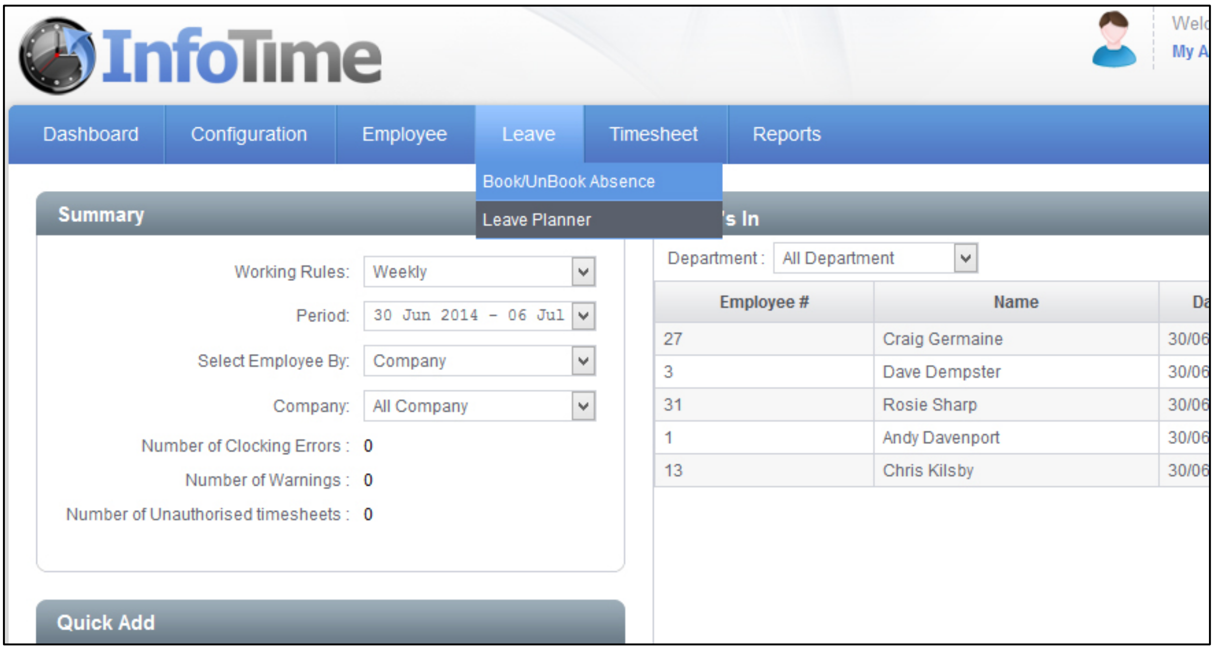


Fig 1

The Leave Planner screen will load (Fig 2)

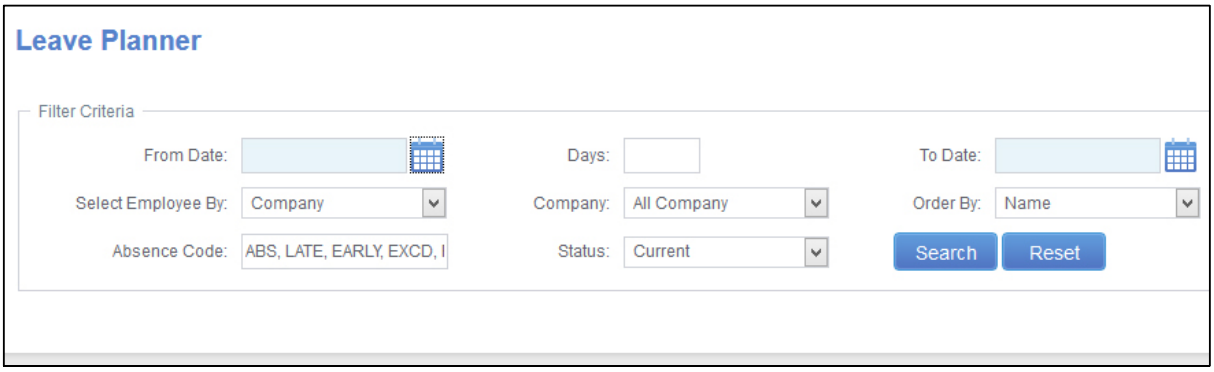


Fig 2

Using the calendar icons set the From Date and To Date to the date range you wish to see leave over. You can filter the screen to only show a specific Department or Company using the Select Employee By section.

Once you these are set click Search.

The screen will refresh to show the Leave Planner for the selected period (Fig 3)

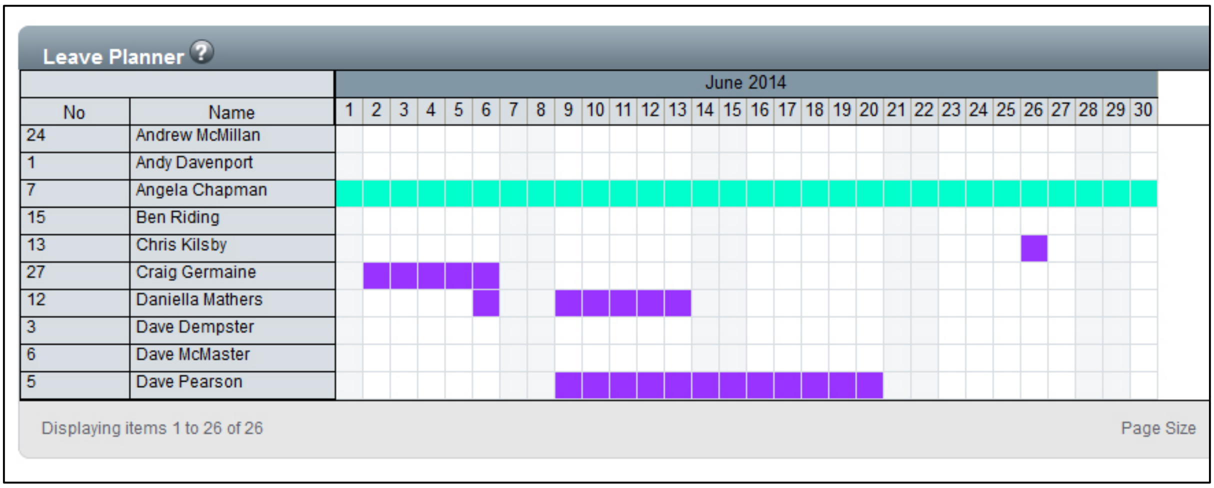


Fig 3

Days where leave has been booked will show in the colour assigned for that leave type. Saturdays and Sundays will show in a light grey colour.

Adding Leave

On the Scheduled Planner screen locate the employee who is taking leave. Once you have located the employee, locate the day (or first day if a range of days to be taken). Right click on the day and a menu will load (Fig 4).

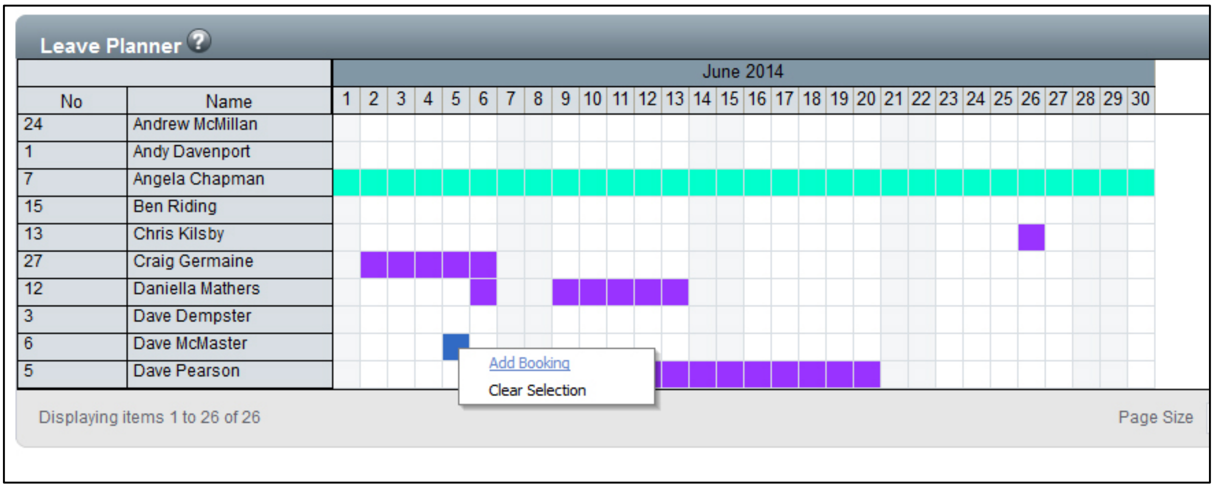


Fig 4

From the menu select Add Booking.

The Manage Absence screen will load (Fig 5)

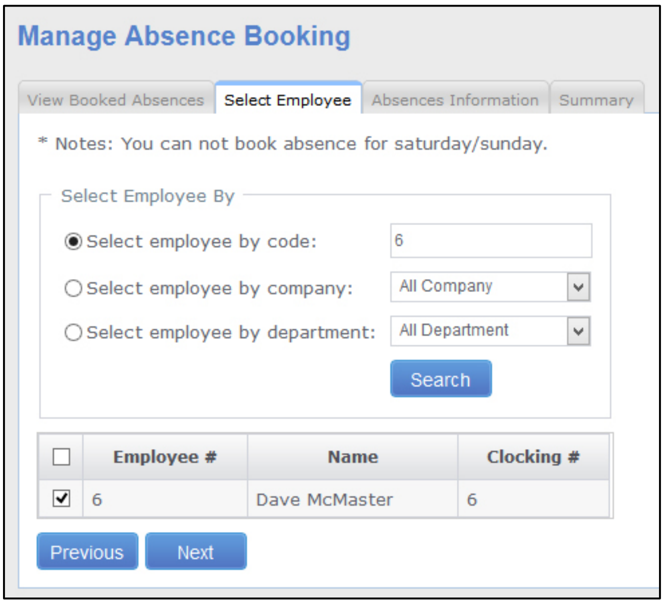


Fig 5

This will show the employee you have selected. If this is correct click Next, otherwise click Previous and reselect.

A new screen will load where you can select the type of absence to be taken and the date range (Fig 6)

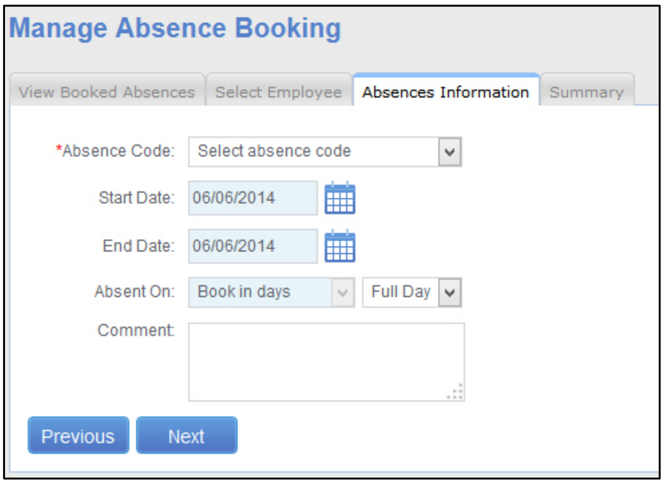


Fig 6

Click the drop down menu for Absence Code and select the correct code for this instance of leave.

User the calendar icon next to Start Date and End Date to select the start and end date of this instance (if one day the start and end dates should be the same).

Select whether this is a full or a half day instance of leave.

You can enter a comment about why this leave instance is been taken (i.e. the illness when the employee books sick)

Once you have entered these details click Next.

The Summary page will load (Fig 7).

Fig 7

If the leave booked effects the employee's leave entitlement then the summary will show the employees allocated leave, the total number of days taken so far and their remaining leave entitlement. A suggested number of booking days will also be shown, this can be amended should the number of days you wish to deduct from their remaining entitlement be different.

If you are happy with the settings for this booking click Book Absence. Otherwise click Previous to go back and amend the booking.

Amending a Leave Booking

On the Scheduled Planner screen locate the employee who is taking leave. Once you have located the employee, locate the booking to be amended. Right click on the booking and a menu will load (Fig 8).

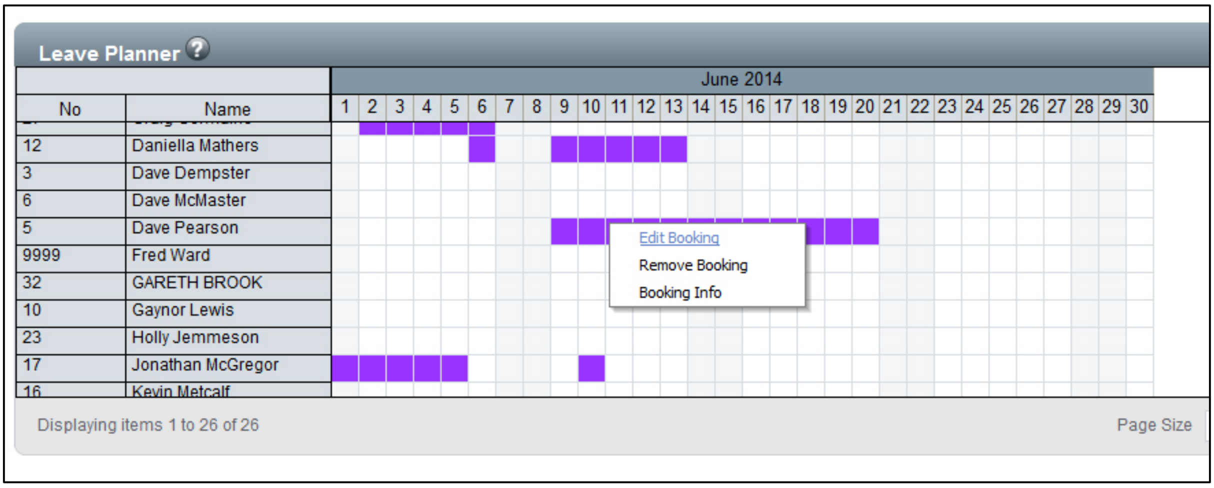


Fig 8

From the menu select Edit Booking.

The Manage Absence screen will load (Fig 9).

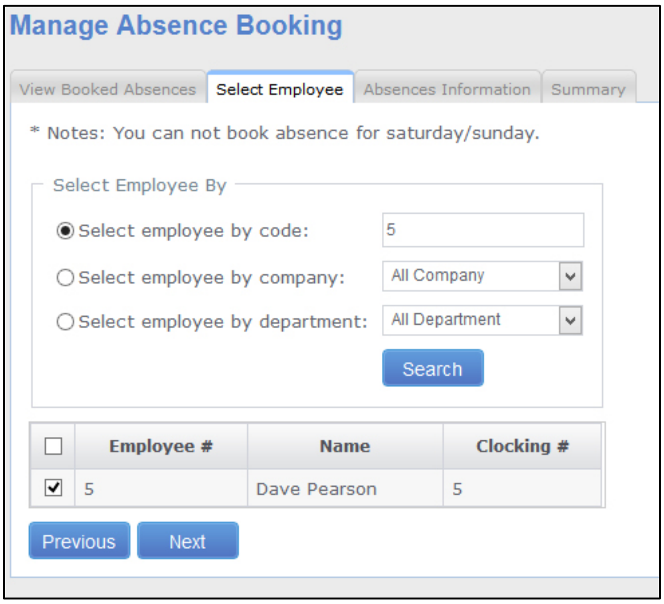


Fig 9

The first screen will show the employee the leave was booked for. Click Next.

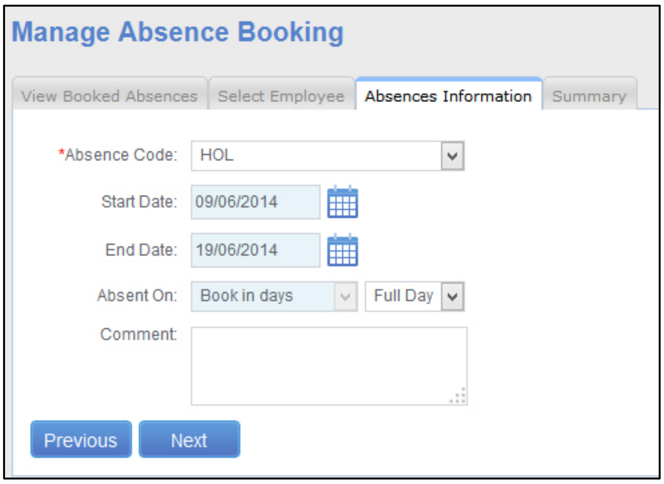


Fig 10

The settings for this absence will then be shown. Amend these as needed. Then click Next.

A Summary screen will then load (Fig 11)

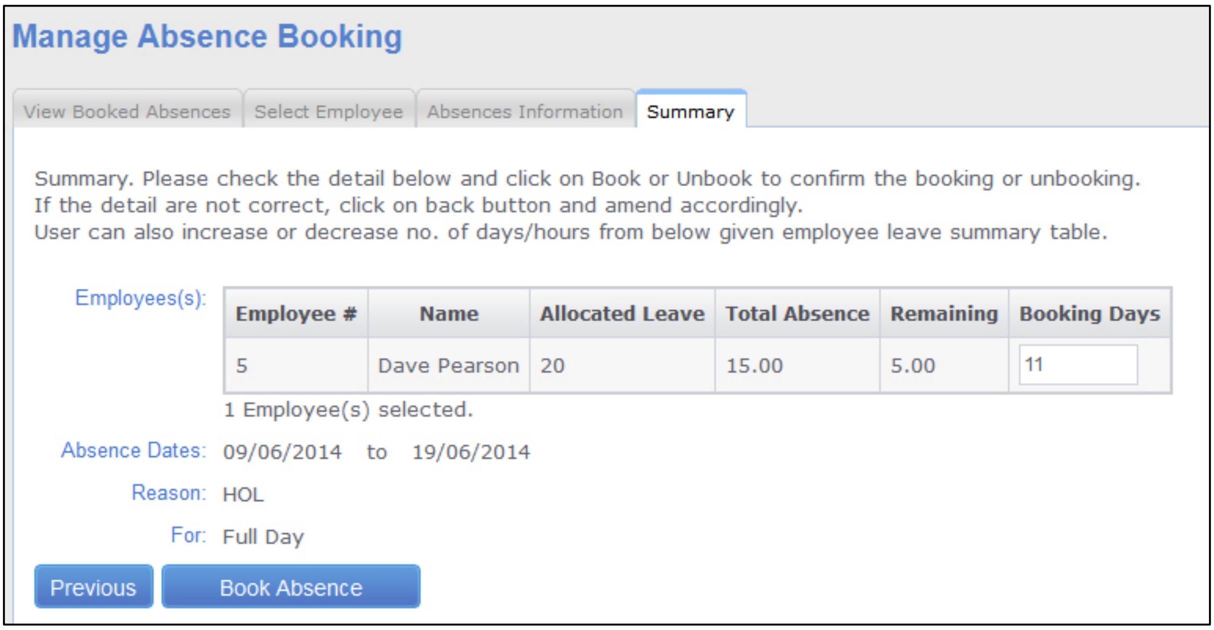


Fig 11

Make any changes you need on this screen and the Book Absence save the changes.

Removing Leave

On the Scheduled Planner screen locate the employee who has cancelled some leave. Once you have located the employee, locate the booking to be removed. Right click on the booking and a menu will load (Fig 12).

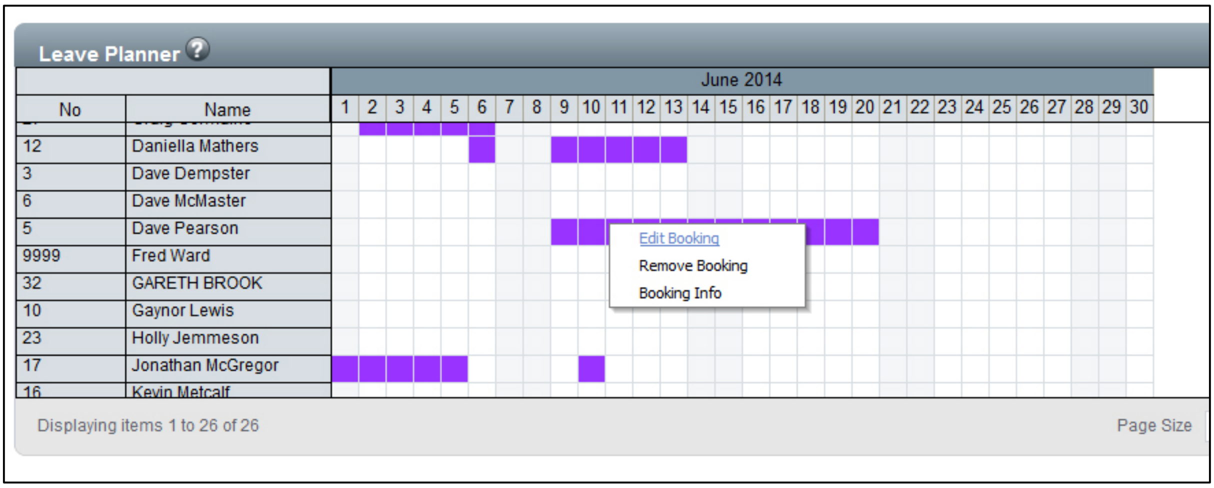


Fig 12

From the menu that loads select Remove Booking.

A confirmation message will show on screen asking 'Do you really want to remove the booking?' (Fig 13)

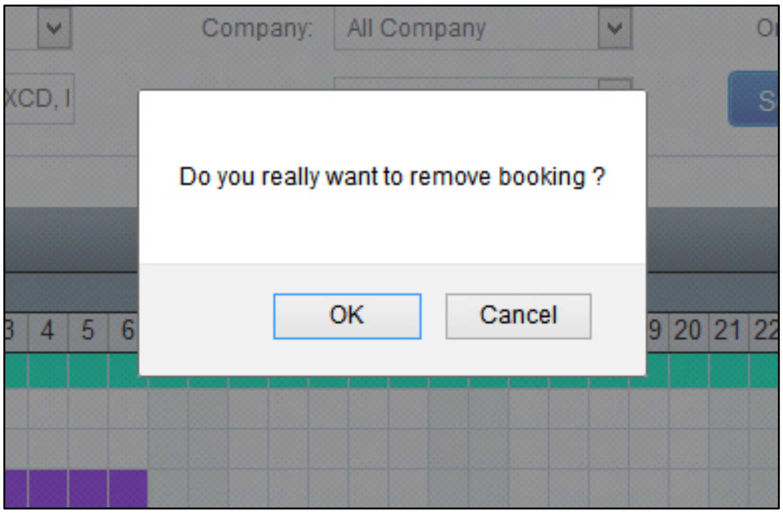


Fig 13

Click Ok to remove the booking from the software.

Running Reports

The reports section of InfoTime allows you to run various reports off for your employees. To access the reports hover over the Reports button on the top menu bar (Fig 1)

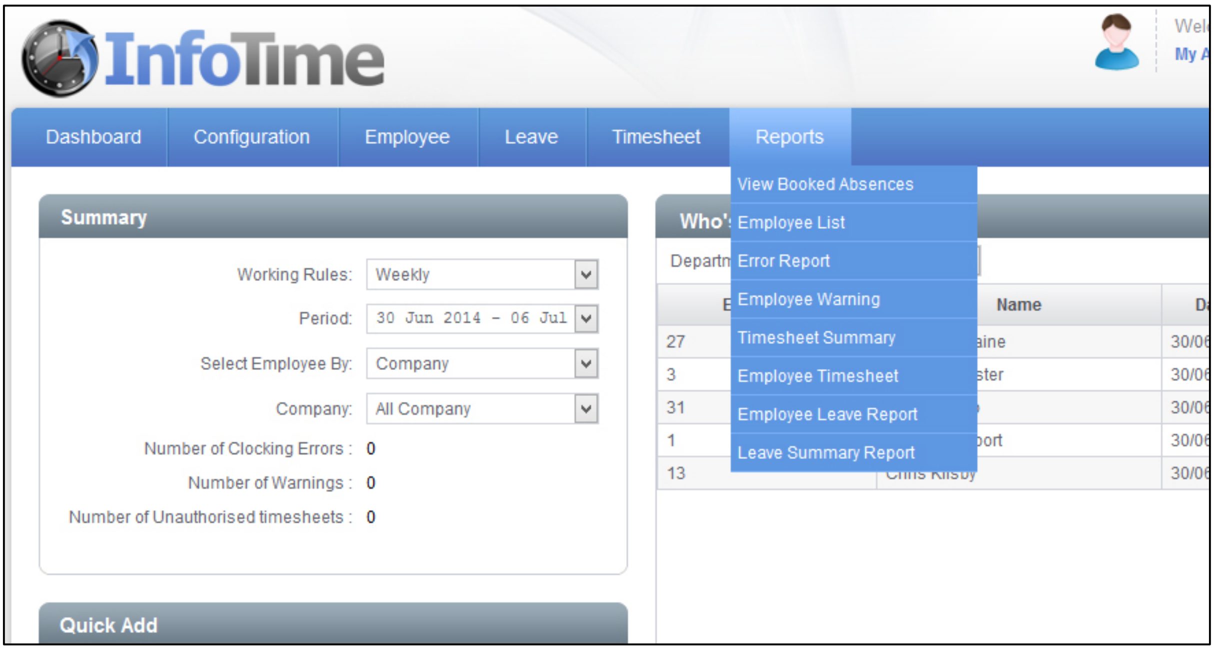


Fig 1

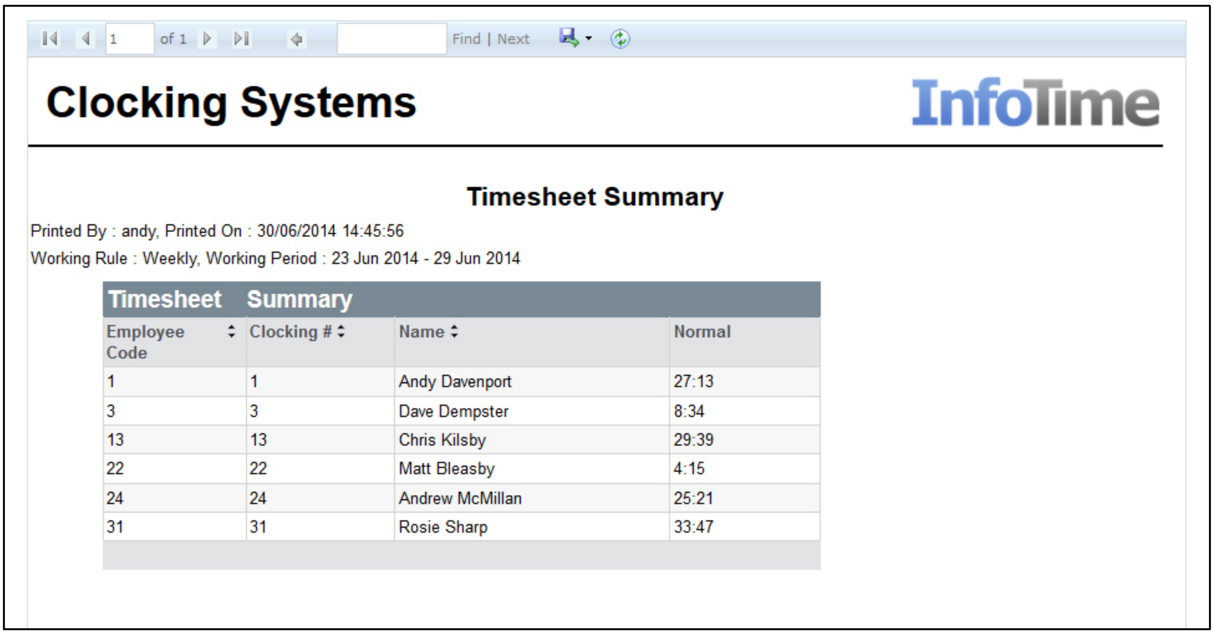
From the list of reports select the report you want to run (i.e. Timesheet Summary).

The screen will change to show the report Filter Criteria (Fig 2). A similar screen will load regardless of which report you chose.

Fig 2

Set the Working Rule and the Period you would like report on and click Search.

The report will then load (Fig 3)



Clocking Systems

InfoTime

Timesheet Summary

Printed By : andy, Printed On : 30/06/2014 14:45:56

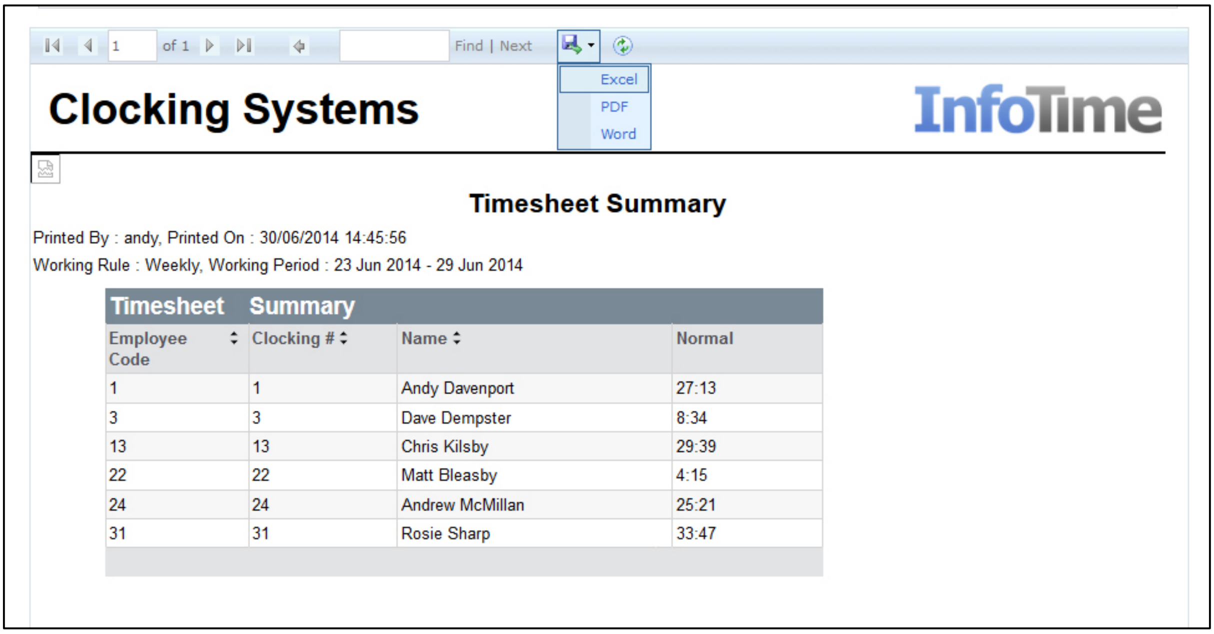
Working Rule : Weekly, Working Period : 23 Jun 2014 - 29 Jun 2014

Timesheet Summary

Employee Code	Clocking #	Name	Normal
1	1	Andy Davenport	27:13
3	3	Dave Dempster	8:34
13	13	Chris Kilsby	29:39
22	22	Matt Bleasby	4:15
24	24	Andrew McMillan	25:21
31	31	Rosie Sharp	33:47

Fig 3

Once the report has run the information will be displayed on the screen. You can then click the icon that looks like a floppy disk to save to a file (Fig 4)



Clocking Systems

InfoTime

Timesheet Summary

Printed By : andy, Printed On : 30/06/2014 14:45:56

Working Rule : Weekly, Working Period : 23 Jun 2014 - 29 Jun 2014

Timesheet Summary

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22	22	Matt Bleasby	4:15
24	24	Andrew McMillan	25:21
31	31	Rosie Sharp	33:47

Fig 4

Sage Payroll Output

The Sage Payroll Output creates a csv file containing the hours worked by the employees over a date range that can then be imported into Sage Payroll.

To access the Sage Payroll Output click on Reports – Sage Payroll Output (Fig 1)

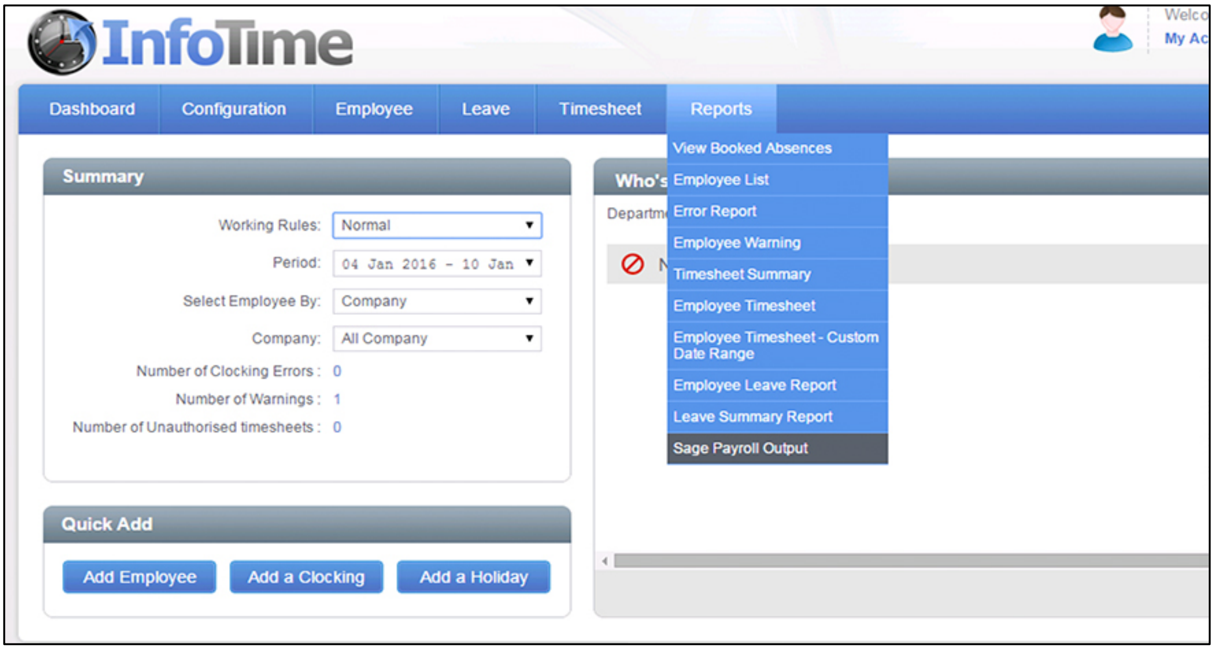


Fig 1

The screen will change to show the report Filter Criteria (Fig 2).

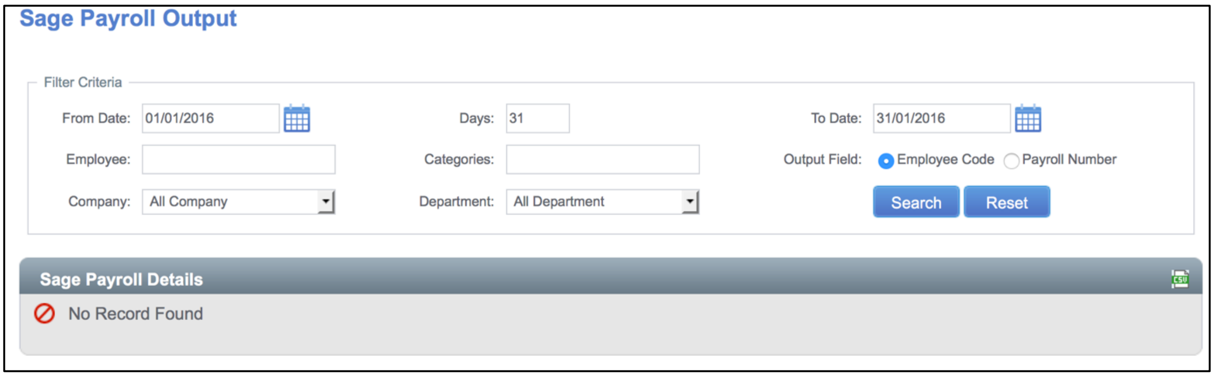


Fig 2

Use the criteria to set the correct date range and select the correct group of employees. Set the Output Field to either use Employee Code or Payroll Number (if on Employee Code then the employee's Employee Code in InfoTime will be used as the reference in the output, if on Payroll Number then the Payroll Number field will be used).

Once the criteria is set, clicking the Search button will return the hours worked by each employee at the various pay categories (Fig 3).

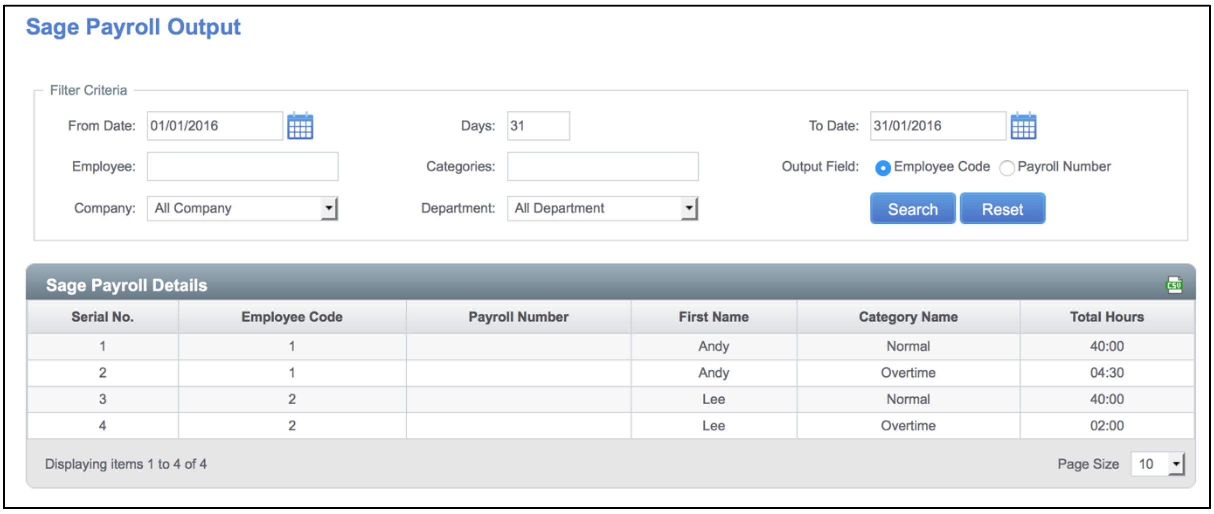


Fig 3

Click the CSV icon at the top right of the list to start the export file download. A new screen will load showing each Pay Category setup in the software and asking for the corresponding Pay Element Number (Fig 4), the pay element for that pay category in your Sage Payroll should be entered.

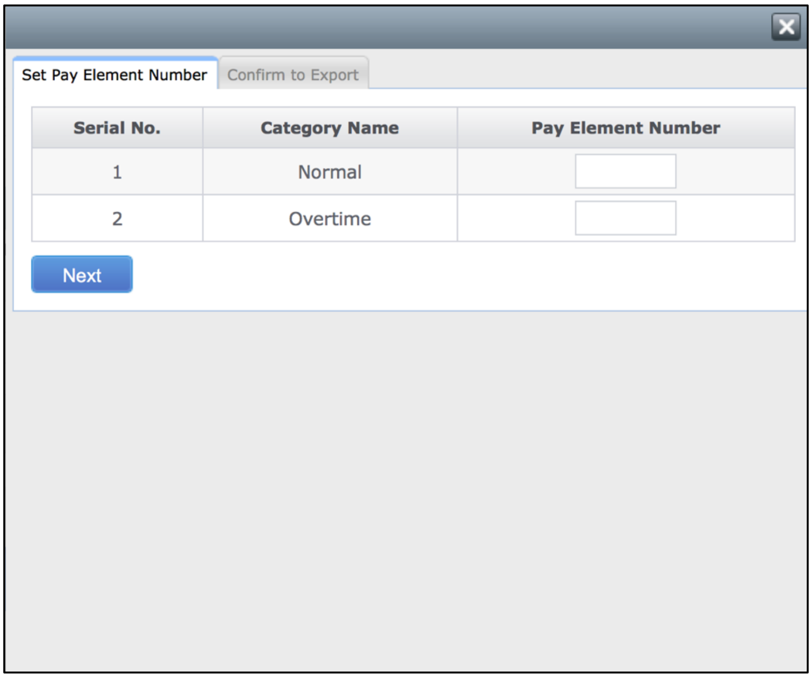


Fig 4

Once the Pay Element Numbers are entered click Next.

A final screen will load as shown in Fig 5, this will confirm the contents of the Export File. Click the Download button and a prompt will load asking to save the file to the PC.

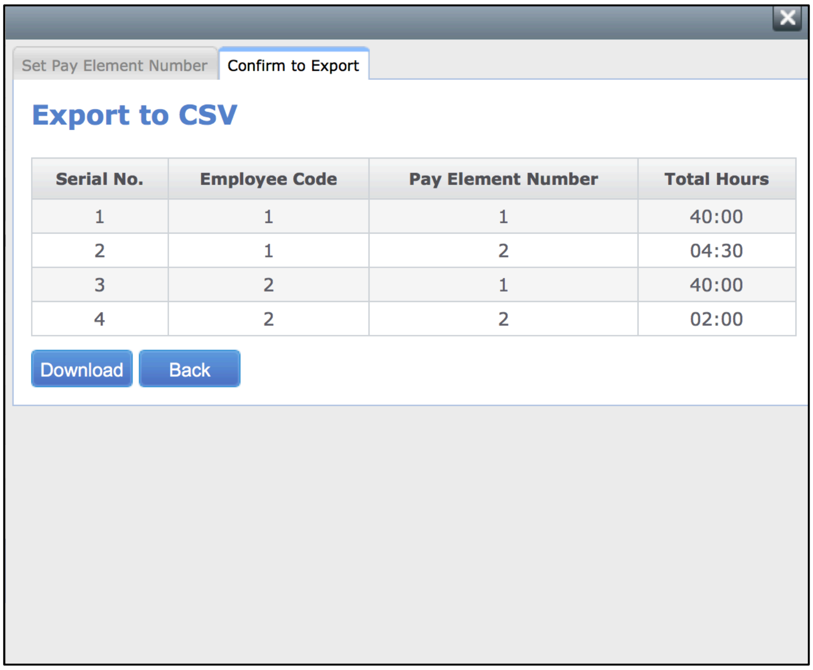


Fig 5

Once saved your PC the file can then be imported into Sage Payroll using the Advance Data Import Wizard. Please refer to the Sage Payroll instruction manual for more information regarding this.

Mobile Clocking

If purchased the Mobile Clocking module allows for employees to clock in and out on a web page via a smartphone. When clocking via a smartphone the employee's location will be captured along with the time and date of the clocking. The location of the clocking can be viewed from the software, allowing managers to monitor mobile workers more effectively.

To effectively use the Mobile Clocking module InfoTime needs to be installed on a web server that is accessible via the internet, you should consult with your IT department to make sure this is possible on your server.

When enabled a link will appear on the InfoTime linking to the Mobile Clocking page (Fig 1)

Fig 1

Clicking this link will take the employee to the Mobile Clocking login page, this can also be accessed at http://InfoTimeSoftwareAddress/EmployeeLogin.aspx where InfoTimeSoftwareAddress is replaced by the address you normally access the InfoTime software.

Once at this location the Employee Clocking in screen will load (Fig 2)

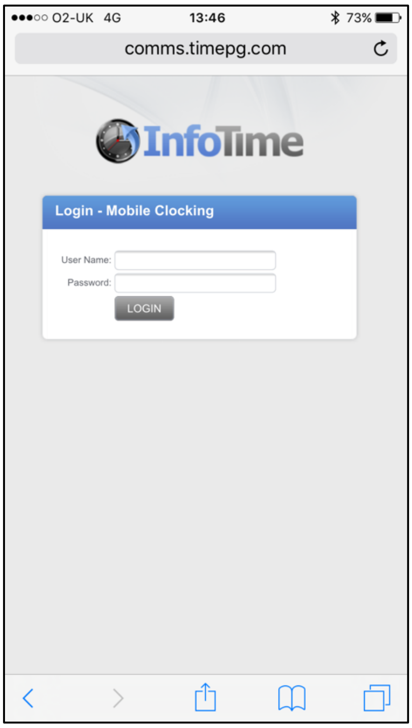


Fig 2

At this screen the employee can login using their login and password. Once they've logged in the Clocking screen will load (Fig 3).

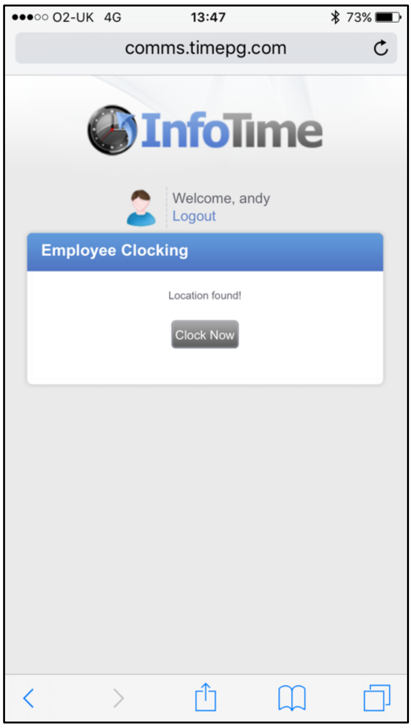


Fig 3

To clock the employee needs to click the Clock Now button.

Once a clocking is successfully made the background of the clocking screen will change to green to show the clocking registered and Clocking Successful will be displayed below the Clock Now button.

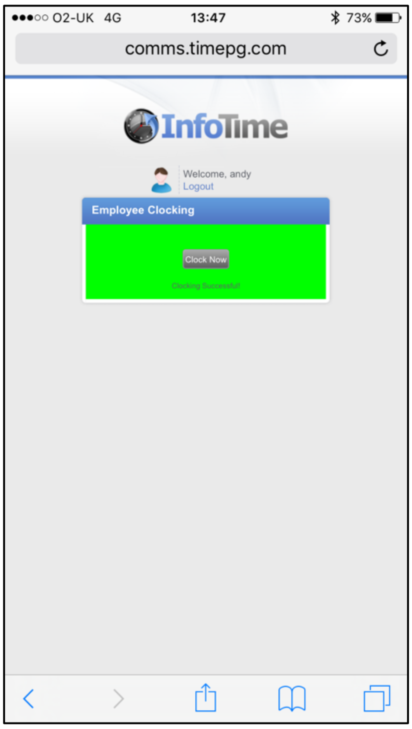


Fig 4

View Employee Location

It's possible to view employee locations either globally or individually. In the Global view you will be able to see the last clocking location for an employee who is currently clocked in. In the individual view you will be able to view the location of any clocking.

Viewing the location of all Employees

Open the Dashboard screen of the InfoTime software, in the Who's In section on the right hand side a list of all the employees who are currently clocked in will be shown. At the top of this list is an option for Show on Map (Fig 5).

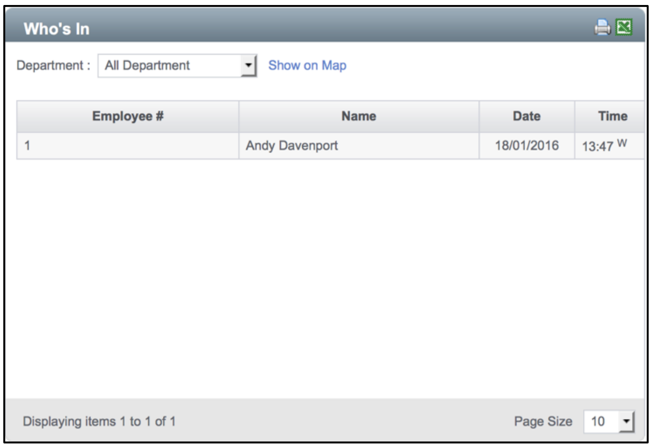


Fig 5

When Show on Map is clicked a new screen will load showing a Google map of the UK and on the left hand side a list of the employee (Fig 6). Clicking on an employee's name from the list will centre the map on that employee's location and display a box showing the time and date of the clocking.

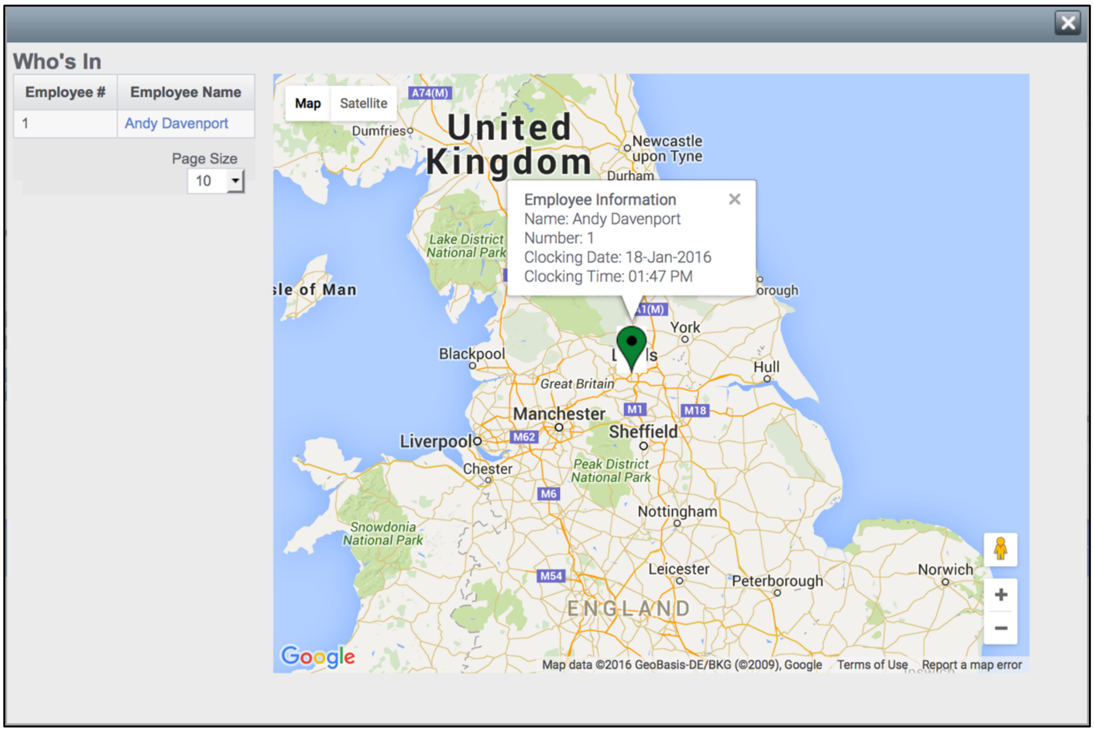


Fig 6

You can use the plus and minus buttons at the bottom right to zoom in the clocking location, or use the orange person icon to load Google Streetview.

Viewing Individual Employee locations

Go to the Employee Timesheet by clicking on Timesheet – View Employee Timesheet (Fig 7).

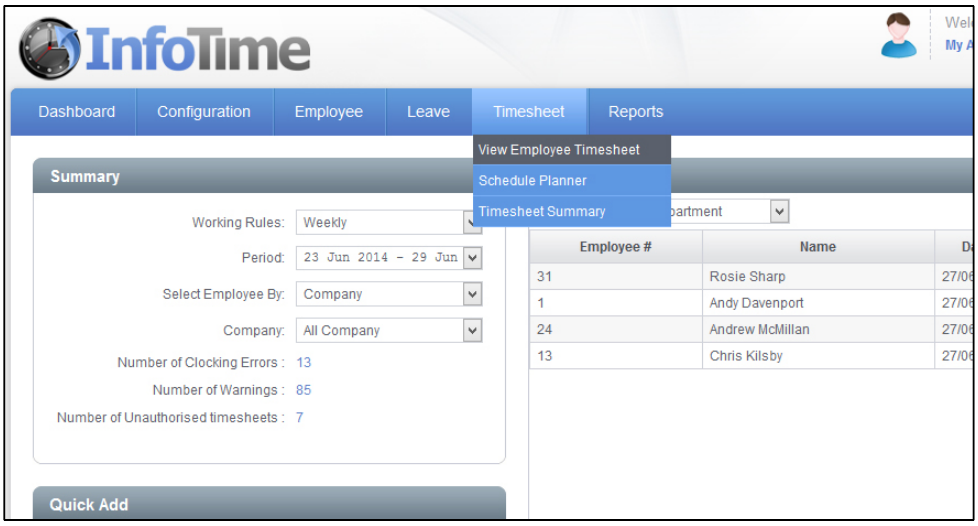


Fig 7

In the Employee Timesheet select the relevant Working Rule and Pay Period (you can also filter for the relevant employee) and then click Search.

The Employee Timesheet will load and any clockings with a location will be highlighted in blue (Fig 8)

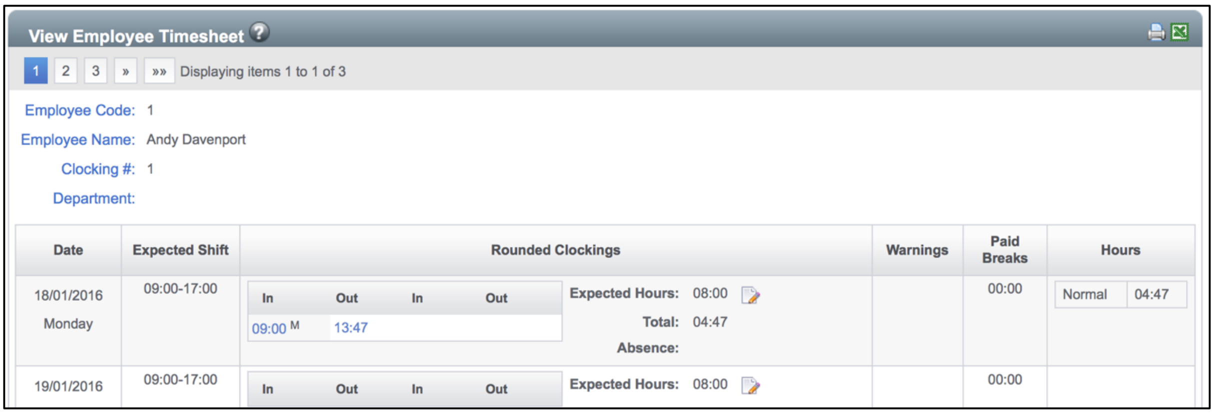


Fig 8

Clicking on a blue clocking will load a Google Map showing the clocking location recorded when that clocking was made (Fig 9).

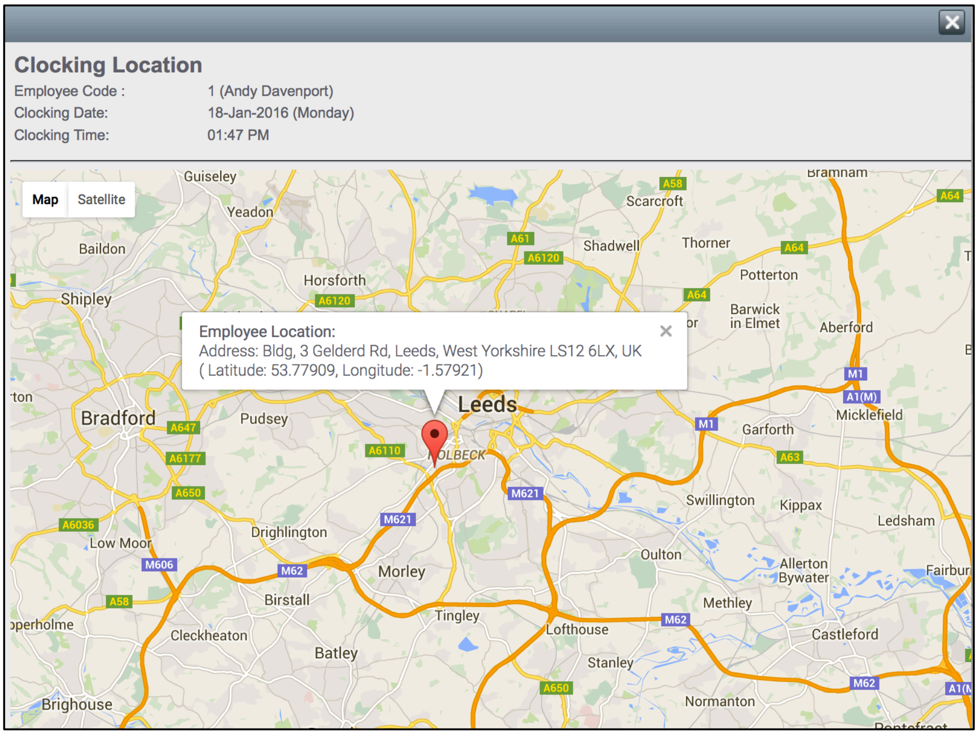


Fig 9

Note: manually adjusted clockings will still show the employee's location when the original clocking was made.

Setting up Employee Logins for Mobile Clocking

Any employee's who will be clocking in and out via a mobile phone will need a username and password creating for them. Logins are stored in the employee's Employee File. Click on Employee – Employee (Fig 10).

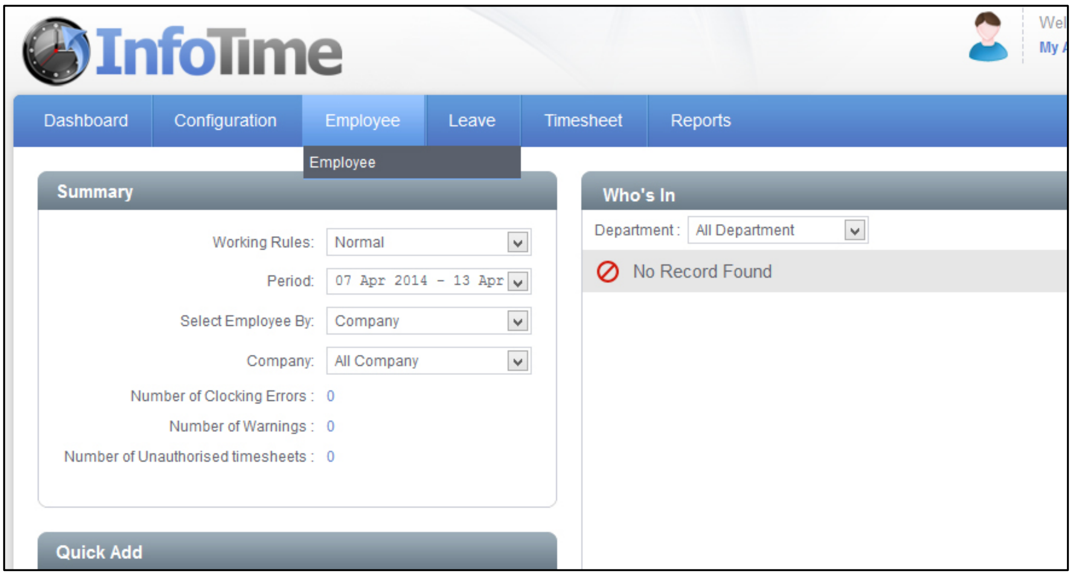


Fig 10

A list of all employees will be loaded (Fig 11). Find the employee and click the Edit button.

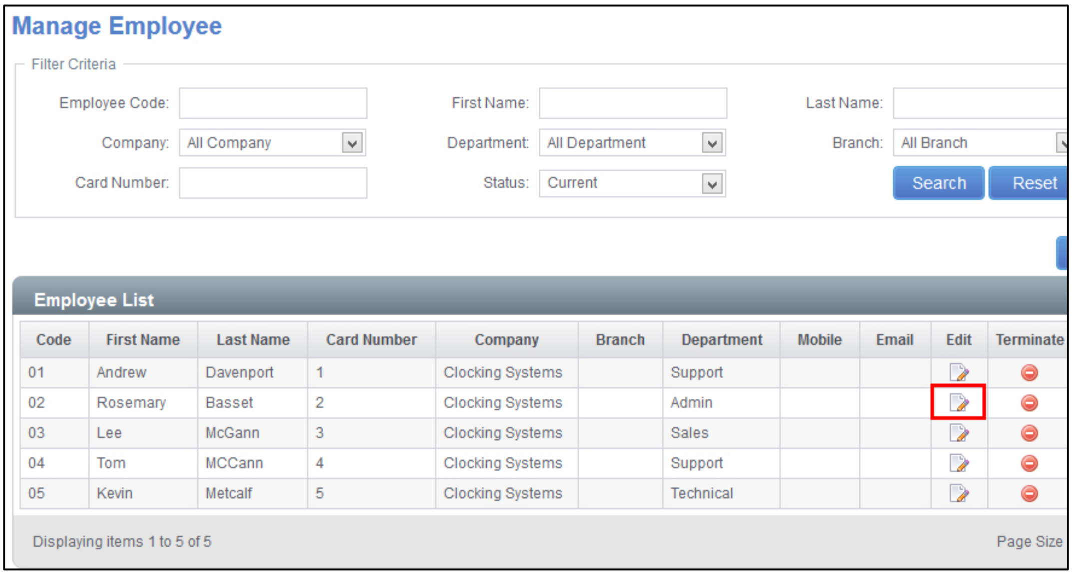


Fig 11

The employee's information will be loaded, on the Employee Details tab locate the section marked Login Details (Fig12).

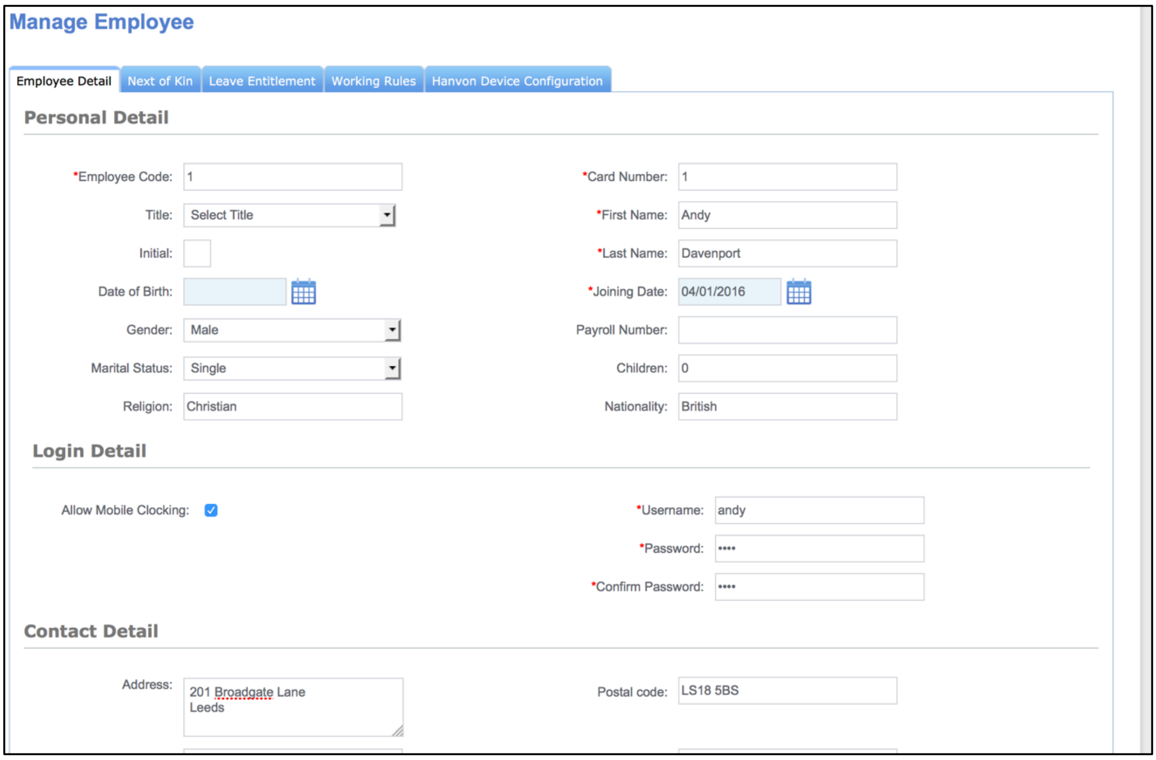


Fig 12

Tick the box marked Allow Mobile Clocking.

In the field marked Username enter the employee's username for the Mobile Clocking module.

Enter the password in the Password field and then enter it again the Confirm Password box.

Then click the Save button.

Roster to Role

If purchased the Roster to Role module allows the user to assign a job role to an employee when they set a scheduled start and finish time. It's then possible to monitor the hours worked against each role by that employee and by all employees over a date range.

Setting up Roles

Before employees can be rostered to a role the roles needed to be defined. When the Roster to Role module is enabled an additional Classification is made available called Role. Unlike the other Classifications employees are not assign to a role when they are added to the system.

From the top menu select Configuration – Classifications (fig 1).

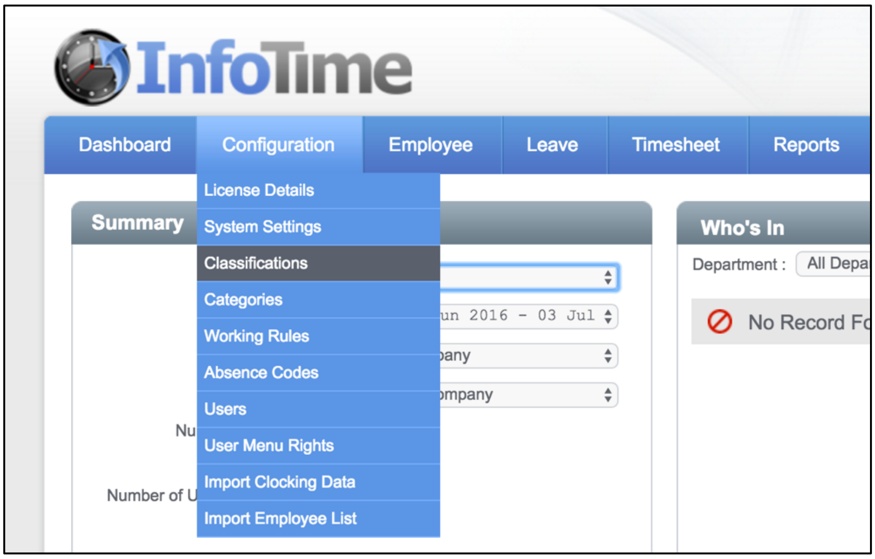


Fig 1

The Classifications section of the system will then load (Fig 2).

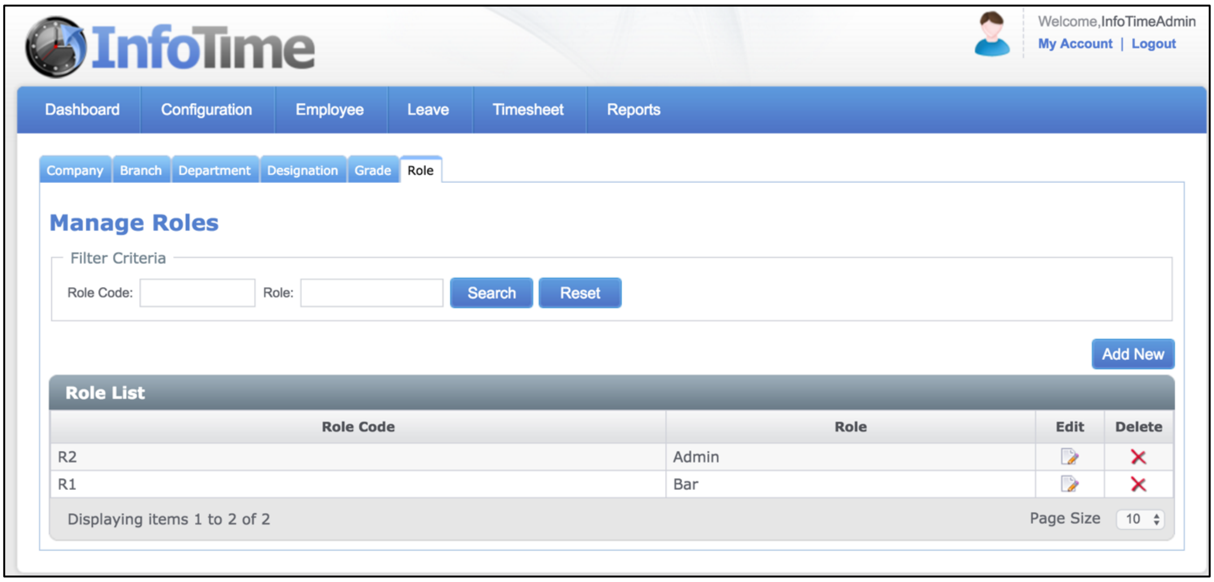


Fig 2

From this screen select the Add New button. An additional entry will be created in the Role List which the fields open for you to define the role (Fig 3).

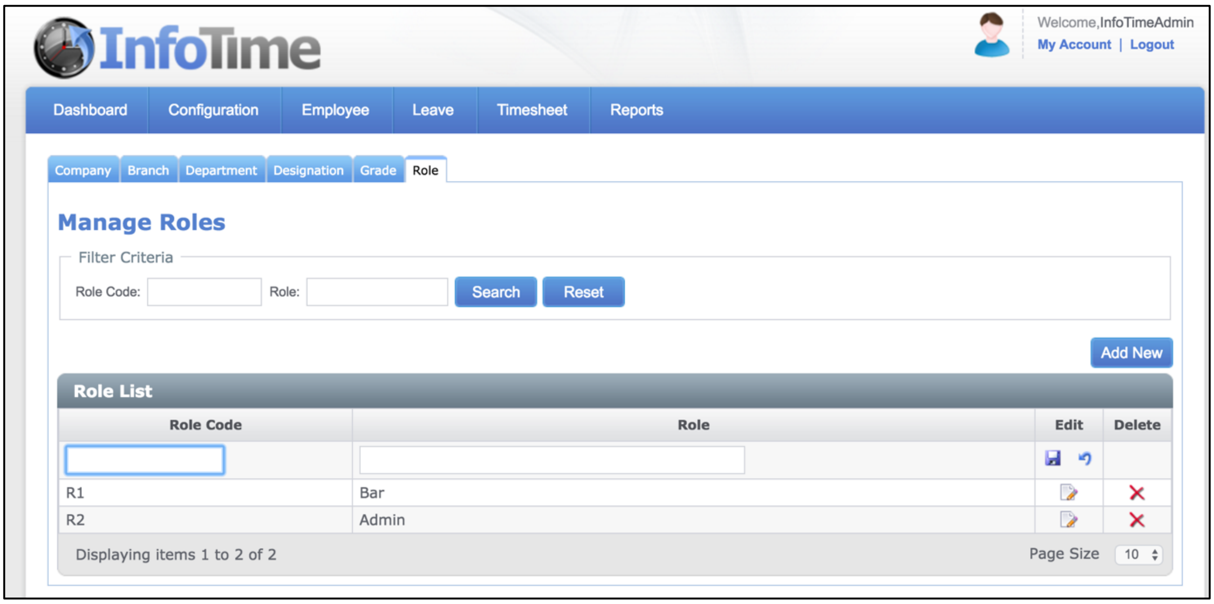


Fig 3

The Role Code is any short code you want to assign for this role. The Role is the actual name of the role, this is the information that will be shown when assigning a role to an employee. Once you have entered this information click floppy disk icon to save the role. It as is possible to define as many roles as needed.

Assigning a Role to an Employee

Roles can only be assigned to employees based on their scheduled start and finish times (i.e. the employee will work 09:00-17:00 as Admin). If an employee is to work more than one role on a given day then a Split Shift can be applied which will allow for the hours to be split between two roles. To access the Schedule Planner click on Timesheet – Schedule Planner (Fig 4).

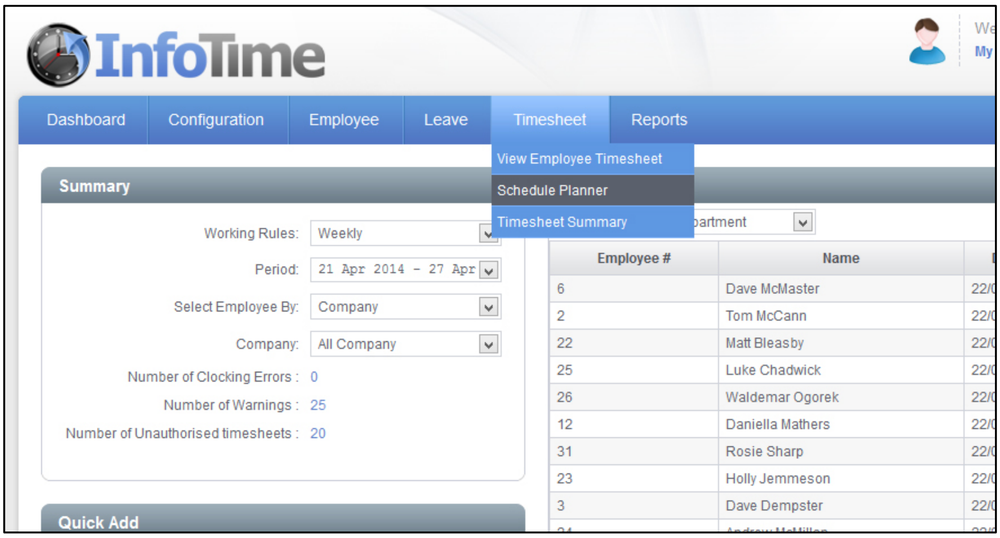


Fig 4

The Schedule Planner screen will load. Initially it will only show the Filter Criteria (Fig 4)

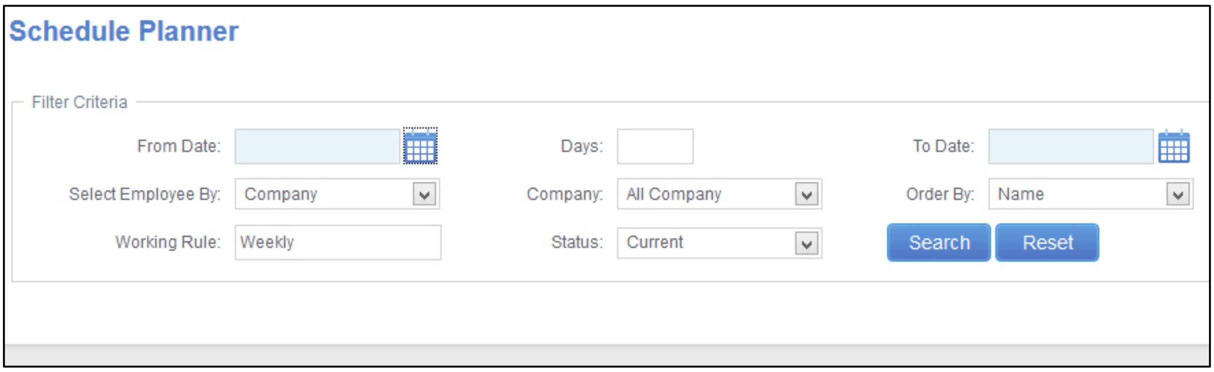


Fig 4

The first thing you need to do is set the date range you wish to see. You can set the date range to be as long as you require i.e. if you are entering a roster for this week just select this week, if you are entering a pattern that repeats every three weeks set the date range to show the three weeks. It is advisable to set the From Date as the first day of the pattern and then the To Date to the last day of the pattern.

You can also set the filter to only show employees in a particular Department, Company, etc. Once you have set the criteria click the Search button.

The screen will refresh to look like Fig 5.

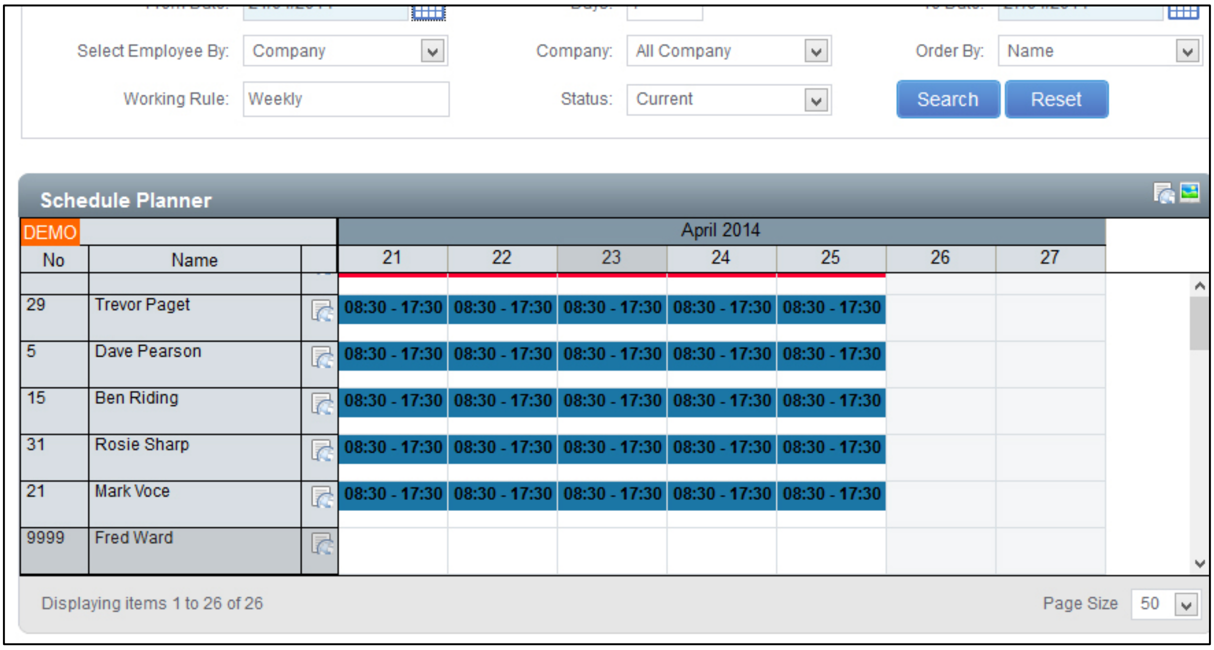


Fig 5

To enter a schedule and assign a role on a particular day, locate the employee and right click on the day you wish to set a start and finish time for, a menu will load (Fig 6).

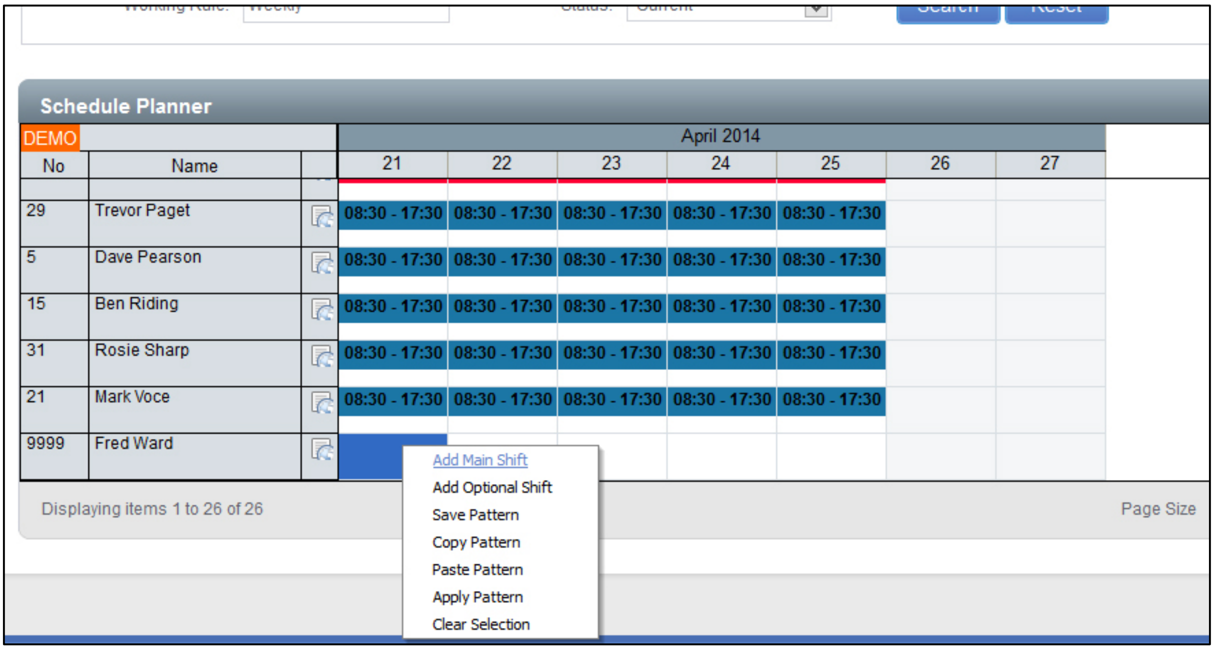


Fig 6

From the menu select Add Main Shift.

The Manage Shift Schedule Wizard will load (Fig 7).

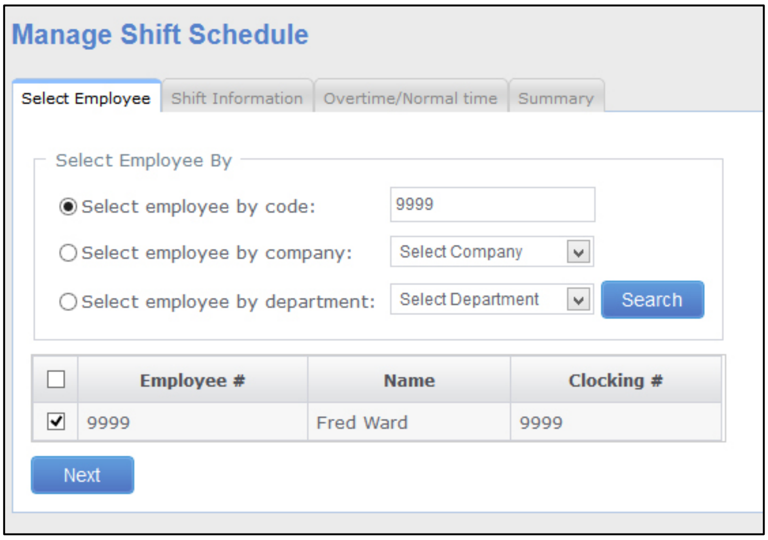


Fig 7

The screen confirms which employee you have selected. Click Next.

The next screen details the Shift Information such as Start Time and End Time (Fig 8).

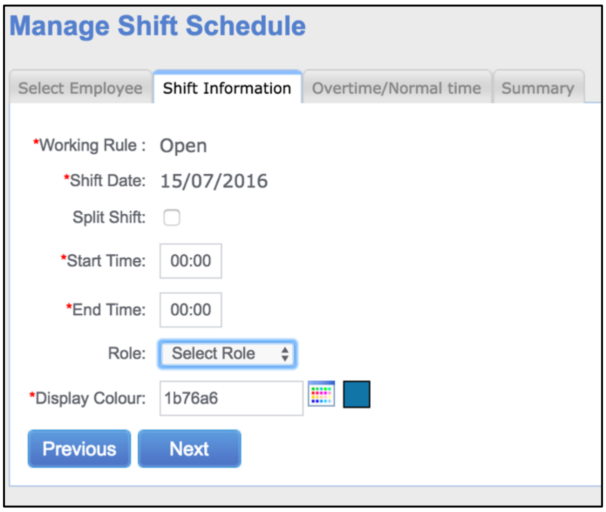


Fig 8

Enter the Start Time and End Time in 24 hour format. Use the drop down menu next to Role to select the Job Role assigned to the employee for this schedule. For the Display Colour click the colour selection tool to the right of the box containing the colour code, you can then pick the colour displayed on the schedule planner from the list of available options.

Click Next, a summary will then be displayed giving details of the schedule you have entered (Fig 9). If you are happy with the settings click Save to add the schedule. Otherwise click Previous to go back and amend the shift.

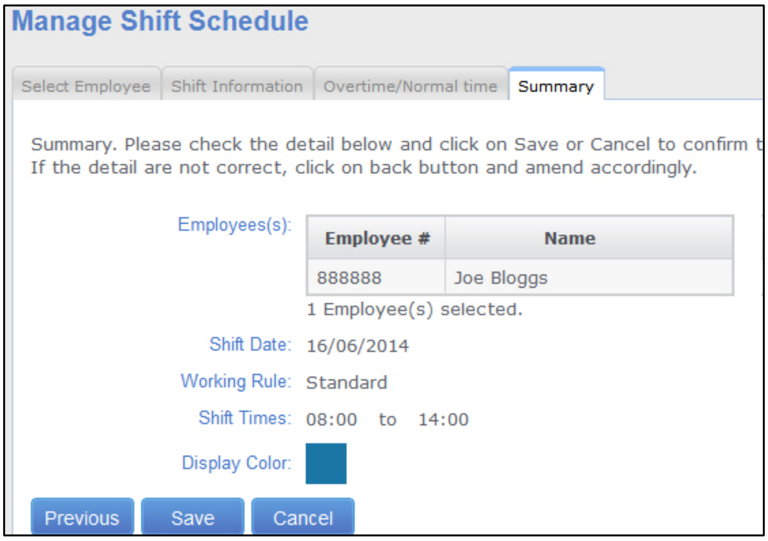


Fig 9

Viewing Hours Worked at Each Role by one Employee

Once an employee is scheduled to a Job Role it is possible the view the hours worked at each Job Role on the Employee Timesheet. The hours will be shown on each day of the period and then at the end of the period a summary will be produced shown the hours worked against each role for the whole of that period.

To access the Employee Timesheet screen select Timesheet – View Employee Timesheet (Fig 10)

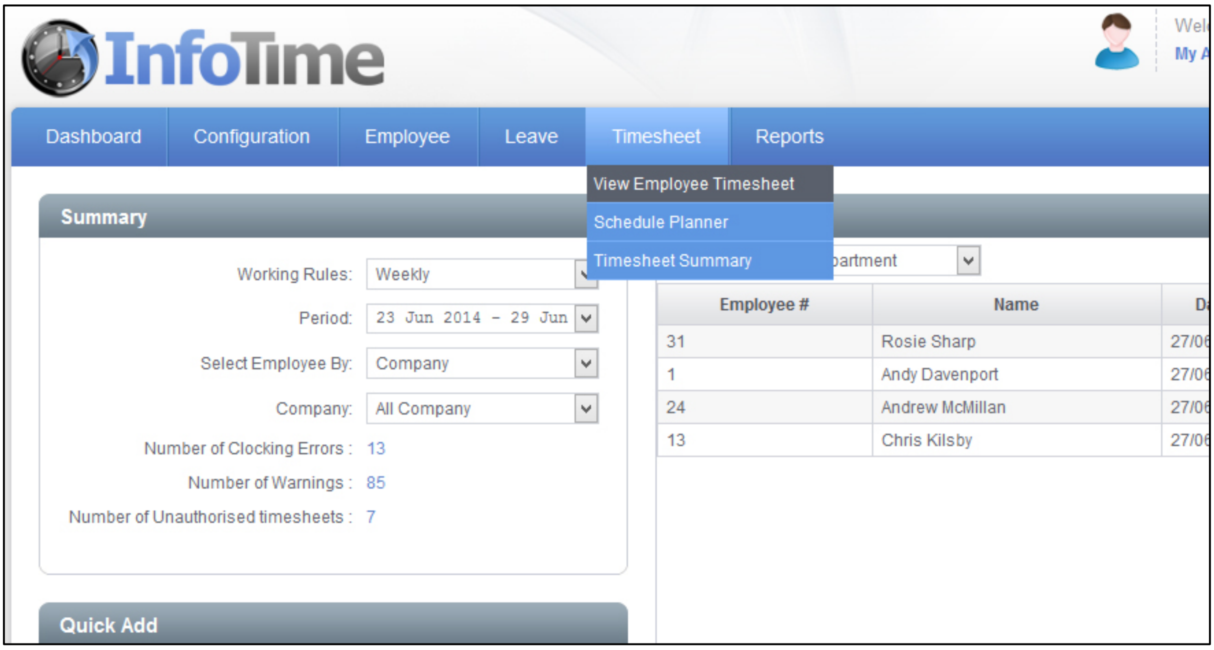


Fig 10

The Employee Timesheet screen will load (Fig 11)

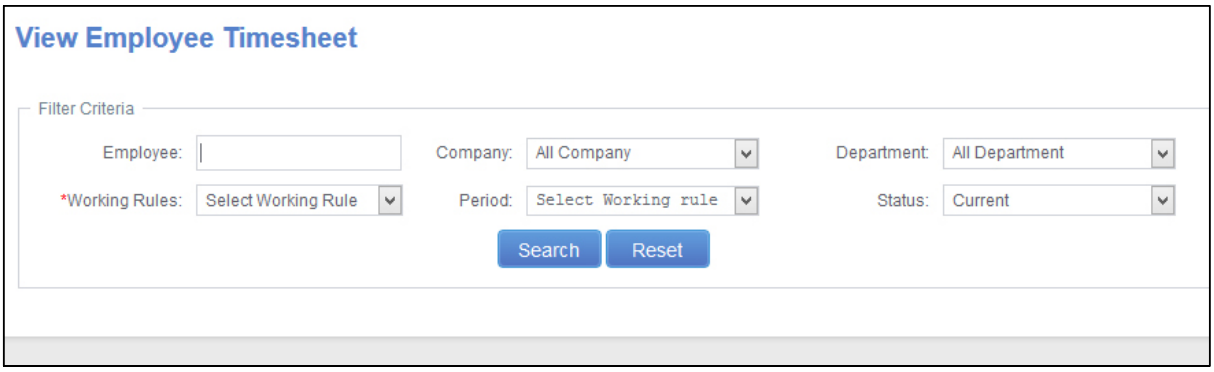
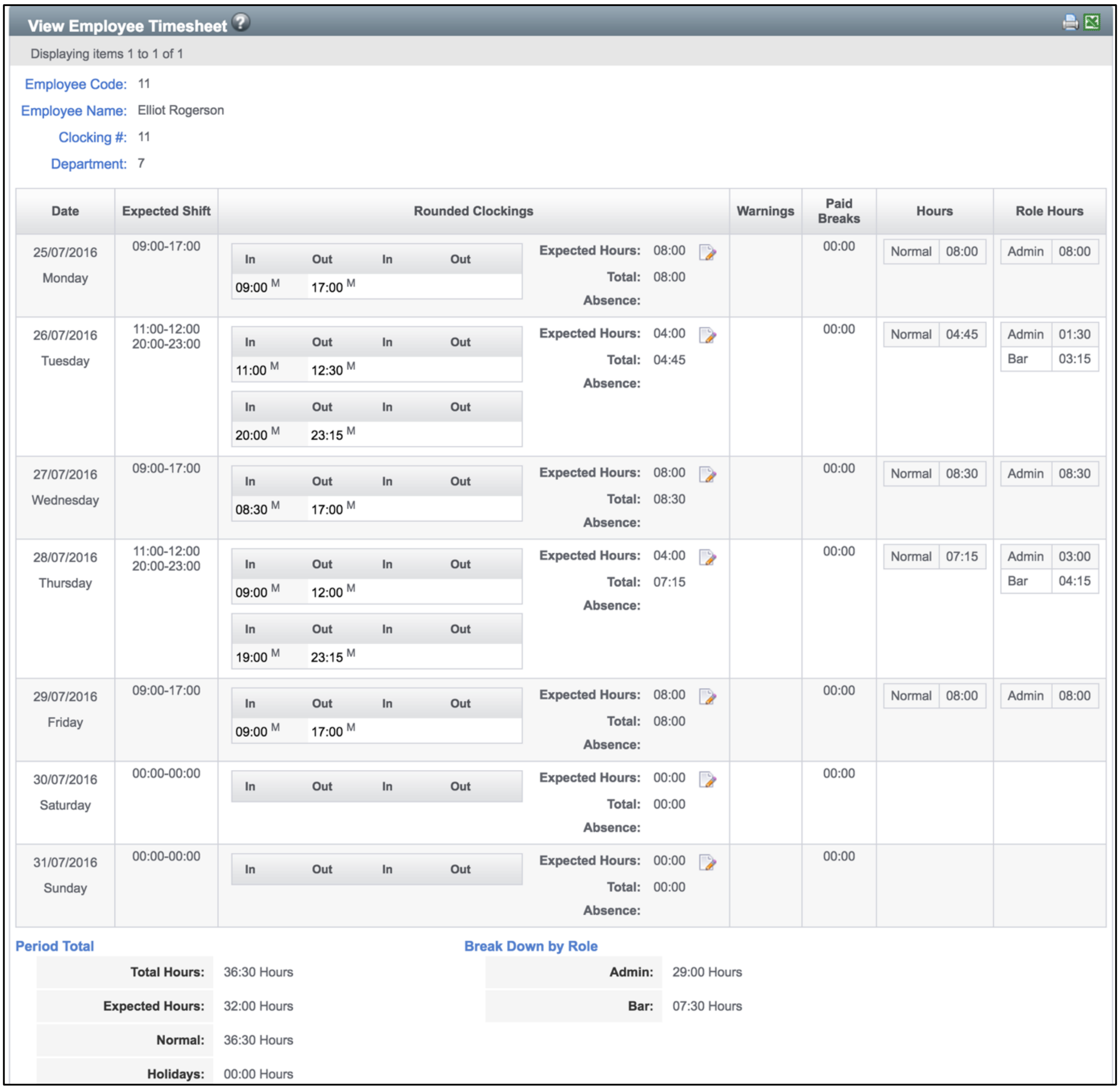


Fig 11

You can use these settings to determine which employees and which pay period you wish to with to look at. Set the Working Rule and the Period and then click Search.

The screen will refresh and the Timesheet for one employee will load (Fig 12).


View Employee Timesheet

Displaying items 1 to 1 of 1

Employee Code: 11
Employee Name: Elliot Rogerson
Clocking #: 11
Department: 7

Date	Expected Shift	Rounded Clockings	Warnings	Paid Breaks	Hours	Role Hours
25/07/2016 Monday	09:00-17:00	In 09:00 M, Out 17:00 M; Expected Hours: 08:00 Total: 08:00 Absence:		00:00	Normal 08:00	Admin 08:00
26/07/2016 Tuesday	11:00-12:00 20:00-23:00	In 11:00 M, Out 12:30 M; In 20:00 M, Out 23:15 M; Expected Hours: 04:00 Total: 04:45 Absence:		00:00	Normal 04:45	Admin 01:30, Bar 03:15
27/07/2016 Wednesday	09:00-17:00	In 08:30 M, Out 17:00 M; Expected Hours: 08:00 Total: 08:30 Absence:		00:00	Normal 08:30	Admin 08:30
28/07/2016 Thursday	11:00-12:00 20:00-23:00	In 09:00 M, Out 12:00 M; In 19:00 M, Out 23:15 M; Expected Hours: 04:00 Total: 07:15 Absence:		00:00	Normal 07:15	Admin 03:00, Bar 04:15
29/07/2016 Friday	09:00-17:00	In 09:00 M, Out 17:00 M; Expected Hours: 08:00 Total: 08:00 Absence:		00:00	Normal 08:00	Admin 08:00
30/07/2016 Saturday	00:00-00:00	Expected Hours: 00:00 Total: 00:00 Absence:		00:00		
31/07/2016 Sunday	00:00-00:00	Expected Hours: 00:00 Total: 00:00 Absence:		00:00		

Period Total

Total Hours:	36:30 Hours
Expected Hours:	32:00 Hours
Normal:	36:30 Hours
Holidays:	00:00 Hours

Break Down by Role

Admin:	29:00 Hours
Bar:	07:30 Hours

Fig 12

On the timesheet an entry will be made for each day of the Pay Period. In this entry you will see the Expected Shift, the Clockings, any warnings, any paid breaks and then the total hours worked split into the different time categories.

At the bottom of the screen you can cycle through the employees using the arrow keys.

Viewing Hours Worked at Each Role by All Employees

Using Role Tracking Analysis it is possible to review the hours worked at each role over a given date range. To access Role Tracking Analysis, from the menu bar select Reports – Role Tracking Analysis (Fig 13).

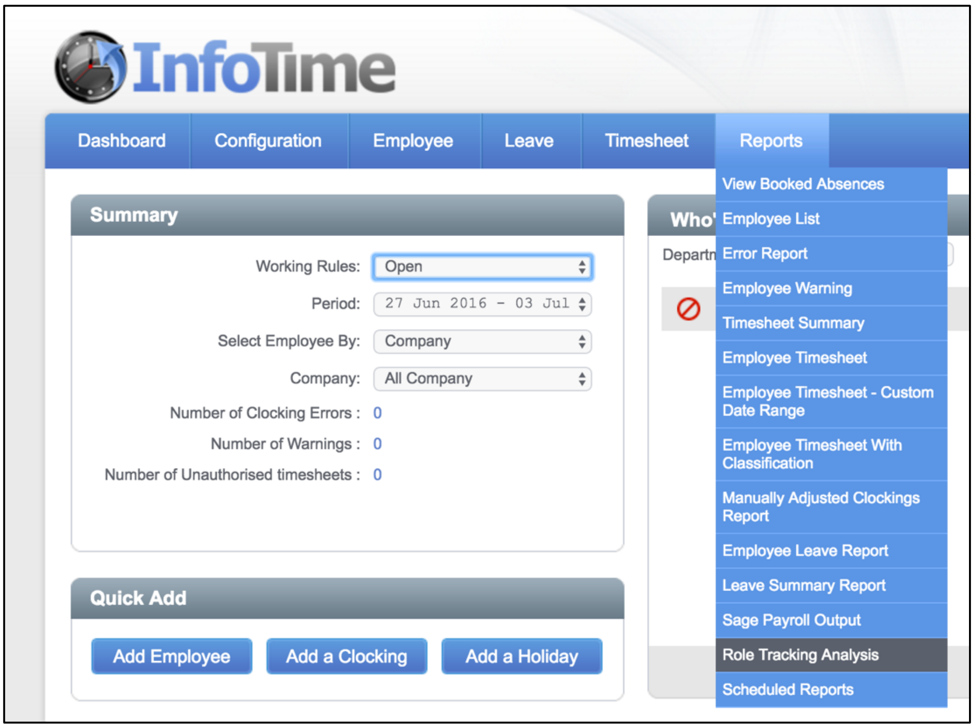


Fig 13

The screen will change to show the report Filter Criteria (Fig 14). A similar screen will load regardless of which report you chose.

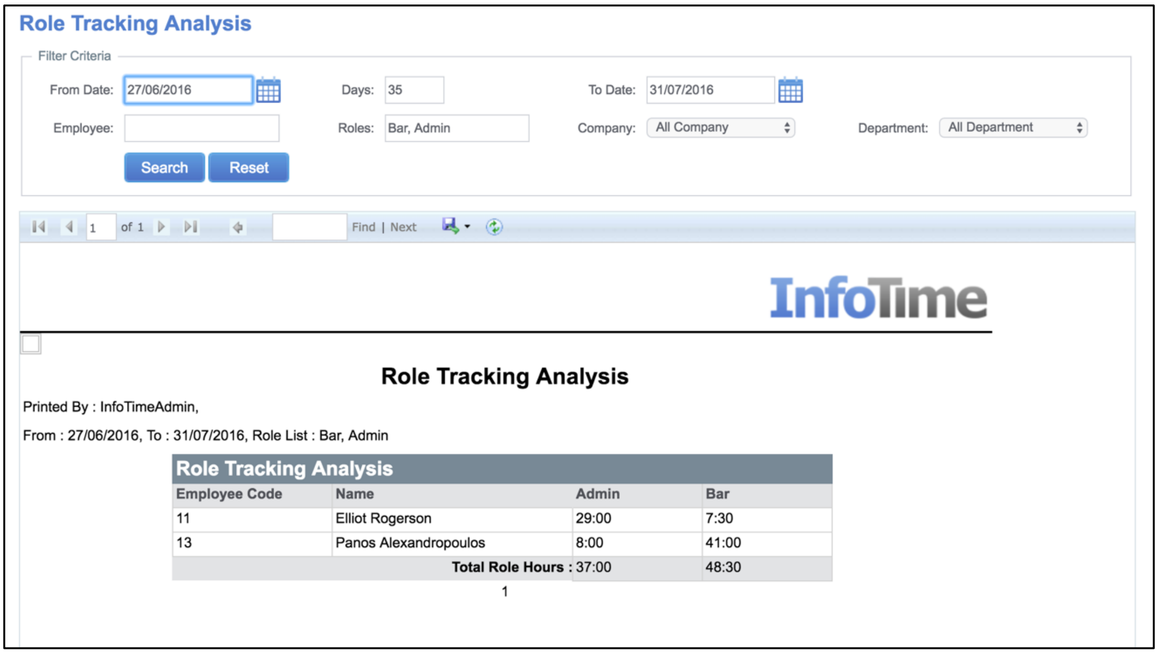


Fig 14

Trouble Shooting

After installation when I open the default web page to access the software I receive a blank page or error 404.

- Check that you have entered the correct address in the address bar of your web browser. Make sure the address takes the form http://localhost/InfoTime where InfoTime is the name of the Virtual Directory you entered during the installation.

- If you have Skype installed make sure that it is set to not use port 80 for communications. To check this open Skype and go to Tools – Options. From the list of options down the left hand side select Advanced – Connection. You will see a tick box marked *'use port 80 and 443 as alternatives for incoming connections'* untick this and reboot your computer then try accessing InfoTime again.

After installation when I open the default web page to access the software I receive and error saying HTTP Error 404.2 – Not Found. The page you are requesting cannot be served because of the ISAPI and CGI Registration list settings on the Web server (Fig 1).

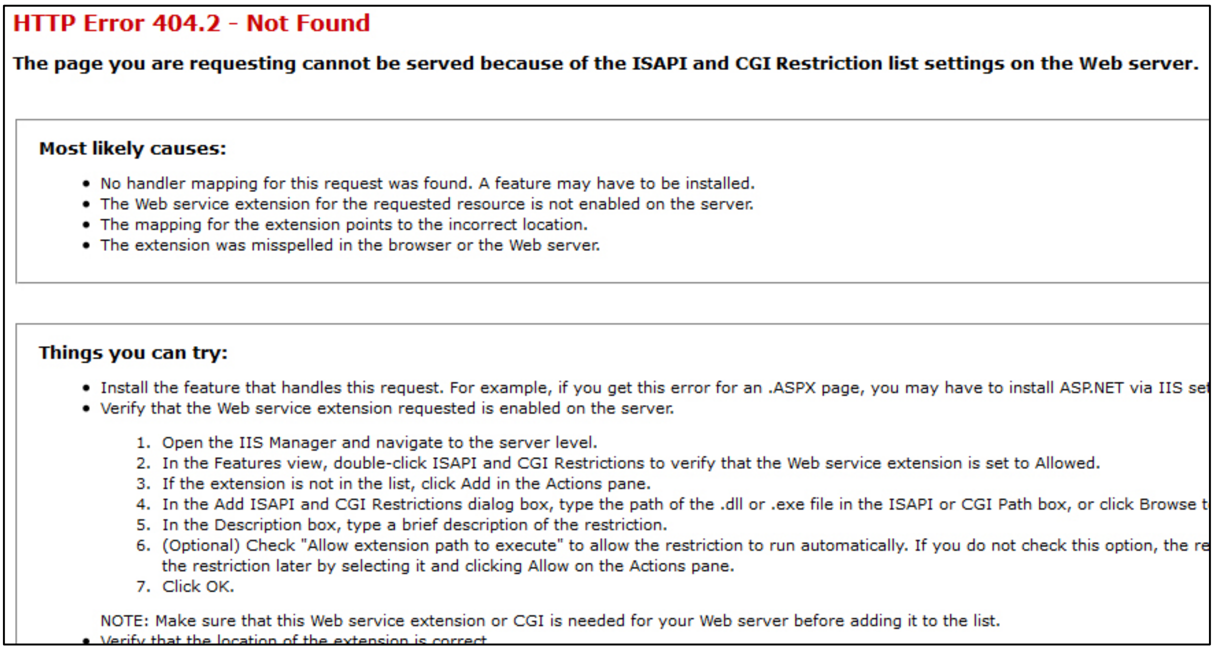


Fig 1

- ISAPI and CGI scripts are currently restricted on your web server for the .net framework. To enable these, go to Windows Start Menu – Control Panel – Administrative Tools – Internet Information Services (IIS) Manager. This will load the IIS Manager. Locate the section marked ISAPI and CGI Restrictions (Fig 2) and double click it.

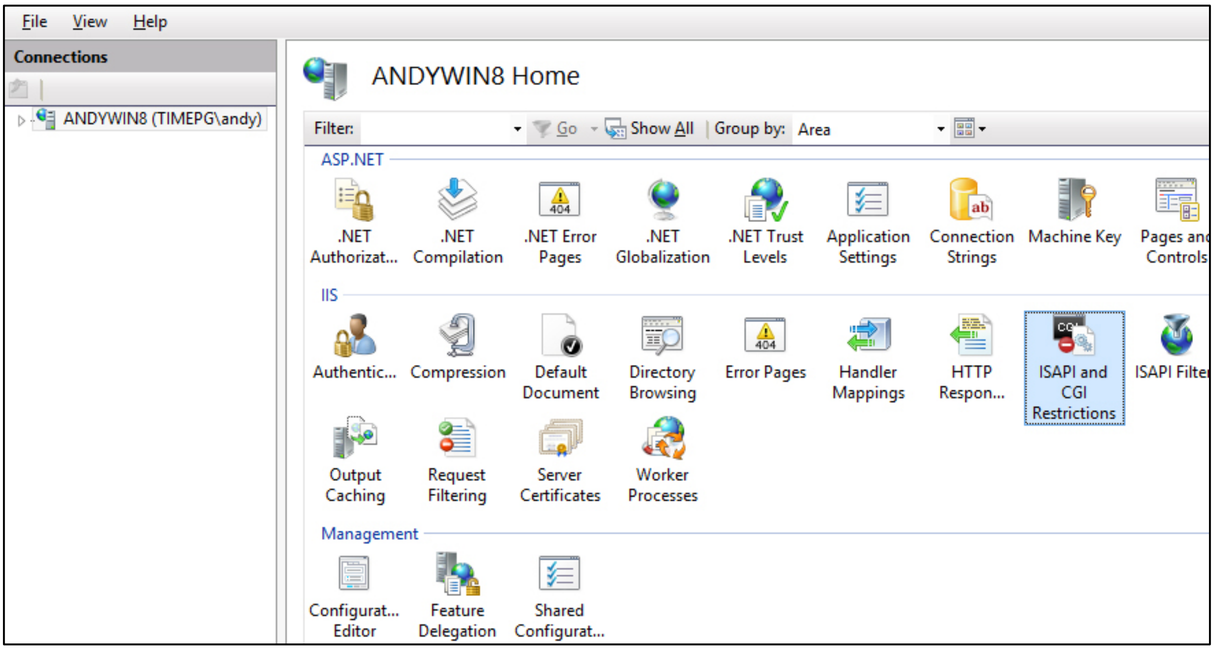


Fig 2

You will be presented with a list of the various CGI and ISAPI controls on your server along with details of whether they are currently allowed or not (Fig 3).

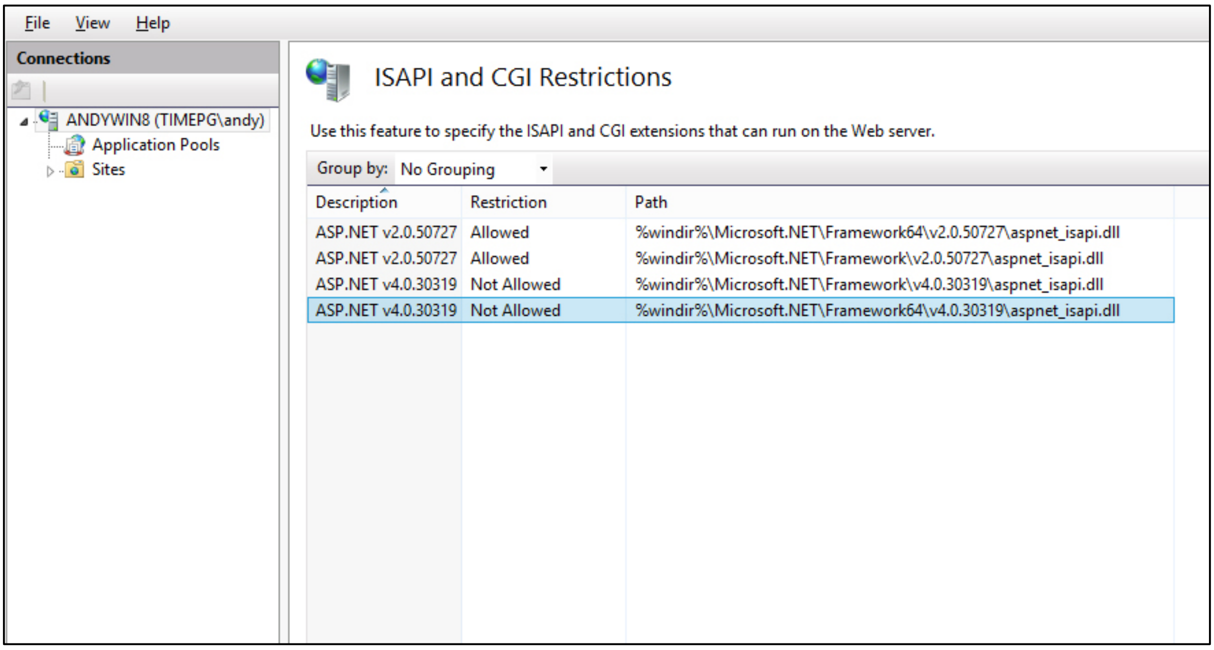


Fig 3

Local any entry that relates to ASP.NET version 4 and ensure that the Restriction is set to Allowed. If any are set to Not Allowed, right click and select Allow. Once you have changed the setting for all instances of version 4 try accessing the web page again.

After installation when I open the default web page to access the software I receive an error saying "Server Error in '/InfoTime' Application. Configuration Error….." (Fig 4)

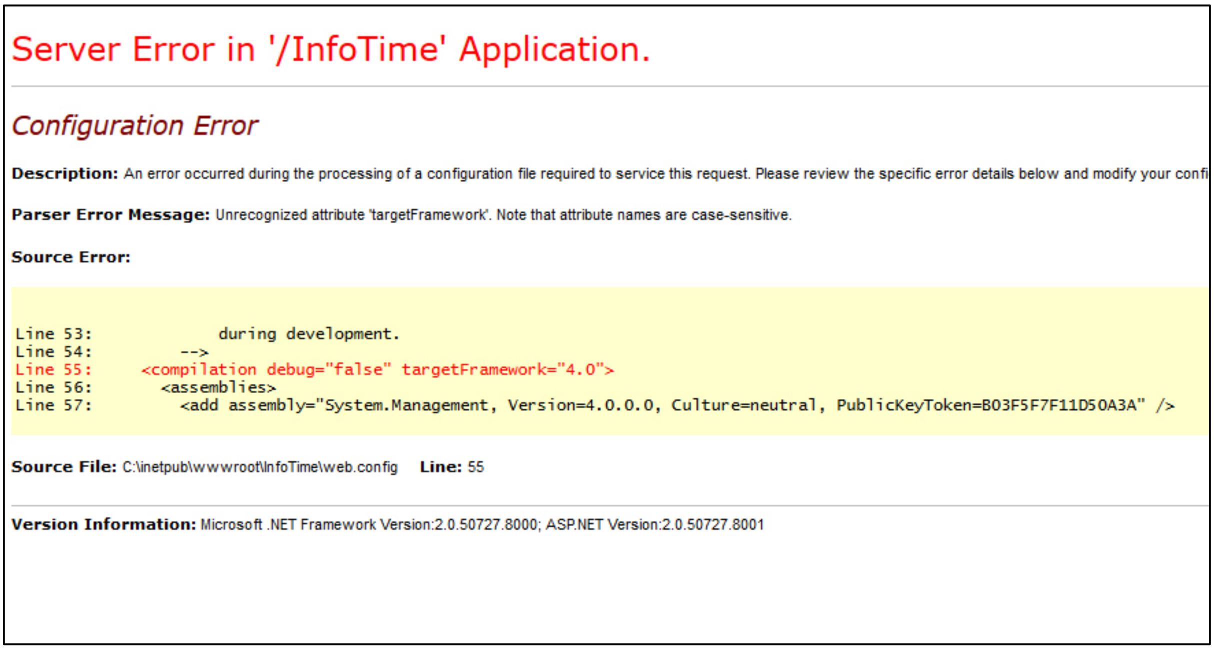


Fig 4

This usually means that InfoTime has been installed into a server Application Pool running the wrong version of the .Net Framework. To enable these, go to Windows Start Menu – Control Panel – Administrative Tools – Internet Information Services (IIS) Manager. This will load the IIS Manager. On the left hand side you will see and entry for your PC, double click this to expand it. Double click the option for Sites, then double click Default Web Site. You should then see and entry for InfoTime (Fig 5).

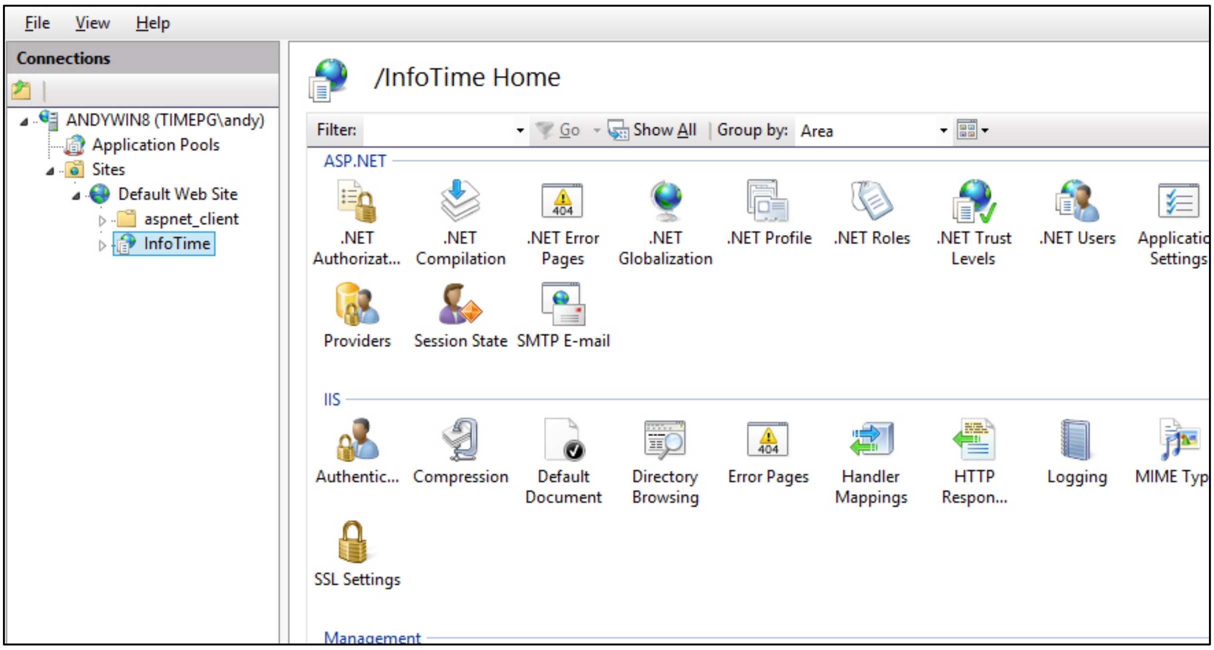


Fig 5

The first option under the General section will be Application Pool (Fig 6), change this setting to either .Net V4.5 Classic or ASP.NET v4.0 Classic (this will depend on the version of .Net you have installed)

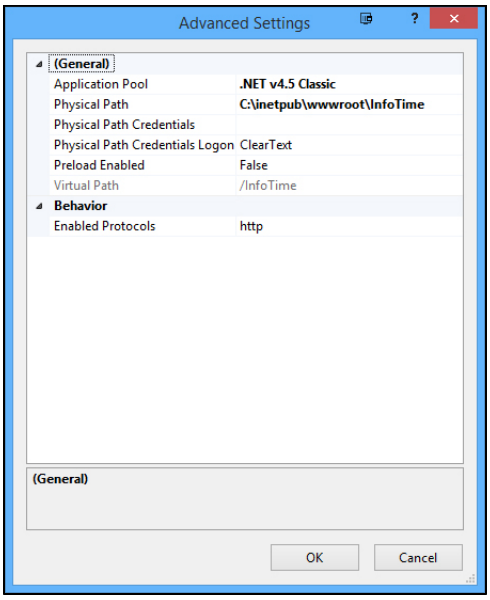


Fig 6

Once this is set click OK. Then try accessing InfoTime again.

After installation when I open the default web page to access the software I receive an error saying "Server Error in '/InfoTime' Application. Configuration Error….." (Fig 7)

Server Error in '/InfoTime' Application.

Configuration Error

Description: An error occurred during the processing of a configuration file required to service this request. Please review the specific error details below and modify your configuration file appropriately.

Parser Error Message: Could not load file or assembly 'Microsoft.ReportViewer.WebForms, Version=10.0.0.0, Culture=neutral, PublicKeyToken=b03f5f7f11d50a3a' or one of its dependencies. The system cannot find the fil

Source Error:

```
Line 75:         <add assembly="System.Windows.Forms, Version=2.0.0.0, Culture=neutral, PublicKeyToken=B77A5C561934E089" />
Line 76:         <add assembly="System.Web.RegularExpressions, Version=2.0.0.0, Culture=neutral, PublicKeyToken=B03F5F7F11D50A3A" />
Line 77:         <add assembly="Microsoft.ReportViewer.WebForms, Version=10.0.0.0, Culture=neutral, PublicKeyToken=B03F5F7F11D50A3A" />
Line 78:       </assemblies>
Line 79:       <buildProviders>
```

Source File: C:\inetpub\wwwroot\InfoTime\web.config **Line:** 77

Assembly Load Trace: The following information can be helpful to determine why the assembly 'Microsoft.ReportViewer.WebForms, Version=10.0.0.0, Culture=neutral, PublicKeyToken=b03f5f7f11d50a3a' could not be load

```
WRN: Assembly binding logging is turned OFF.
To enable assembly bind failure logging, set the registry value [HKLM\Software\Microsoft\Fusion!EnableLog] (DWORD) to 1.
Note: There is some performance penalty associated with assembly bind failure logging.
To turn this feature off, remove the registry value [HKLM\Software\Microsoft\Fusion!EnableLog].
```

Fig 7

While this looks to be the same as the previous error message, the highlighted red line relates to a different part of the application. The reports in InfoTime require Microsoft Report Viewer Version 10 to be able work correctly, if you receive the above error then the server PC does not have Microsoft Report Viewer installed. You can download the installation routine for this from http://www.microsoft.com/en-gb/download/details.aspx?id=6442 (or search on the web for Microsoft Report Viewer 10). Once you have downloaded this, run the installation. After the installation completes reload the InfoTime web page and you should now be presented with a login screen.