Allday Time Manager Primetime User Guide

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Starting Allday Time Manager

The Allday Time Manager Software is protected by a user login system; each user should have their own user name and password in order for you to assign different levels of access to each user. If you have forgotten your password please contact the Allday Time Manager Support Team.

Logging In

Step 1 : Double click on the Allday ATM icon, which is located on the desktop of your computer. The Allday ATM logon screen (see below) will then appear.

Step 2 : Select the "User Name" field and enter 'USER' as your user name. Note that The user name field is always displayed in uppercase regardless of caps lock or shift keys.

Step 3 : Then select the "Password" field and enter 'password' (in lowercase). If this is the first time you have logged in or have recently reset your password, you will be prompted for a new password. Please note that the password field is case sensitive.

Step 4 : Then select "OK". The Software will now appear.

Adding a New Employee

Before your employees can begin to clock, their details need to be entered into the software as the system will require an employee record to store the clocking data against.

Step 1 : Click "Add Personnel" from the "Personnel" side menu bar

Step 2 : The "Add Employee Wizard" will now appear.

Step 3 : You will need to fill in all these details before proceeding to the next screen with the exception of the "Initials" & "Shortname" fields, which are both optional. As you select each field the "Help" area at the top of the screen will update to aid you.

Note: The employees "Start Date" will be used by the system to pro-rata the employee's absence entitlements (if selected on the next screen), so although the employee record has only just been created you may want to alter the "Start Date" to represent an earlier date. Also The software does not require the "Badge Number" to have leading zeros and therefore does not allow you to enter them.

Step 4 : Once you have entered the requested details click "Next" to proceed. Page 2 of the wizard will now be displayed

Step 5 : The second part of the wizard is related to Absence's. To use Absence's within Allday Time Manager, please call us on 01252 544457 to discuss upgrading your software to the Lite or Professional Edition.

Step 6 : Simply click the "Finish" button. The new employees' record will be displayed. Now you can enter any extra employee information, or select "Add" to add more employees.

Viewing / Editing an Employees Record

All the employees' information such as their personal details, shift pattern, absences and clocking times are stored within their personnel record. This is accessed from the "Edit Personnel" button located on the "Personnel" sidebar menu.

Note: The "Clockings" and "Absence" buttons are shortcuts to the employees "Clockings" and "Absence" tabs described later in this section.

Step 1 :   Select "Personnel" from the Menu screen on the left.

Step 2 :   Click "Edit Personnel"

Step 3 :   The "Find Personnel" screen will then appear.

At this point you can either select the employee from the results list or start typing into the Surname, Badge or Payroll number fields to filter the results. You can also use the selection box boxes provided to filter the results further.

Step 4 :   Once you have selected the required employee click "OK", or double click the employees' name.

All the information stored about that employee will now be displayed as a series of tabs: General, Extended, and Clockings.

General Tab

Here you will find all the main details about the current employee and can add the employee's picture, view the employees' job history within the company and select a temporary shift they may be working.
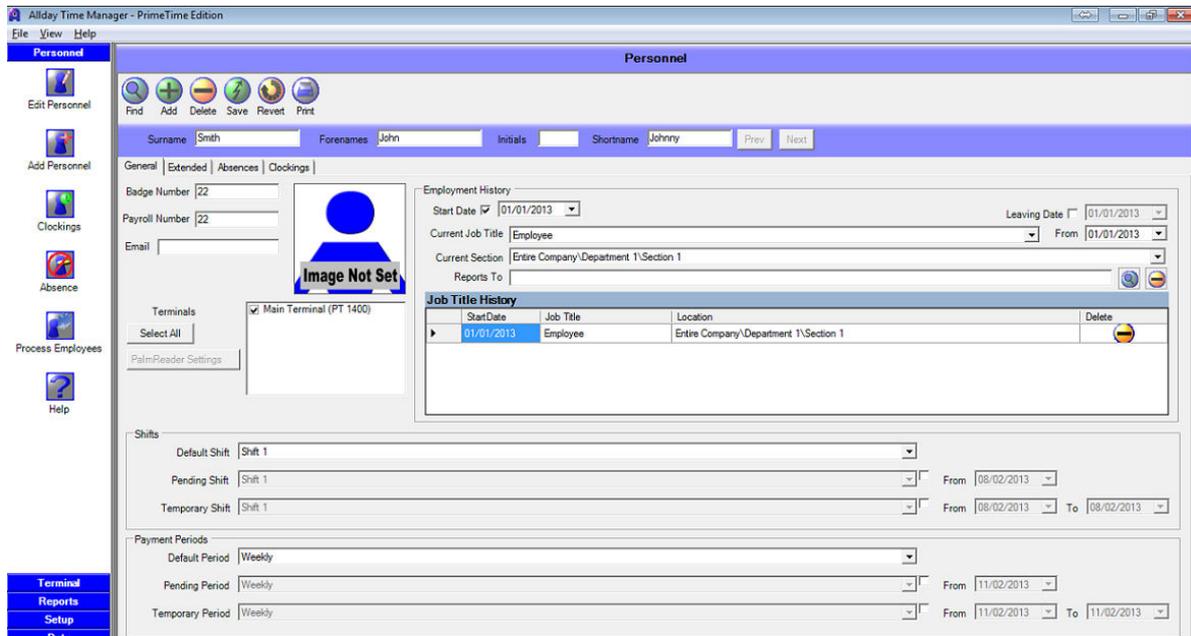
You will find that most of the information on the personnel record was completed during the "Add Employee Wizard". If you need to edit these for any reason, select the applicable field edit the information and click the "Save" button to update the record.

Note: When selecting a new "Job Title" for an employee, you must change the "From" date first in order for the "Job Title History" to be updated. However if you are simply correcting the "Job Title" this does not apply.

Important Notice: Employees must have a badge & payroll number, removing this number and leaving the field blank may prevent you from adding further employees, in the unlikely event that you should need to re-use a badge or payroll number simply alter the existing employees number to a different but unique number first.

Extended Information Tab

The extended tab contains any extra information, above that contained in the General tab, which you may wish to store about your employees. To change any of the items in this tab, simply click and edit the appropriate item.
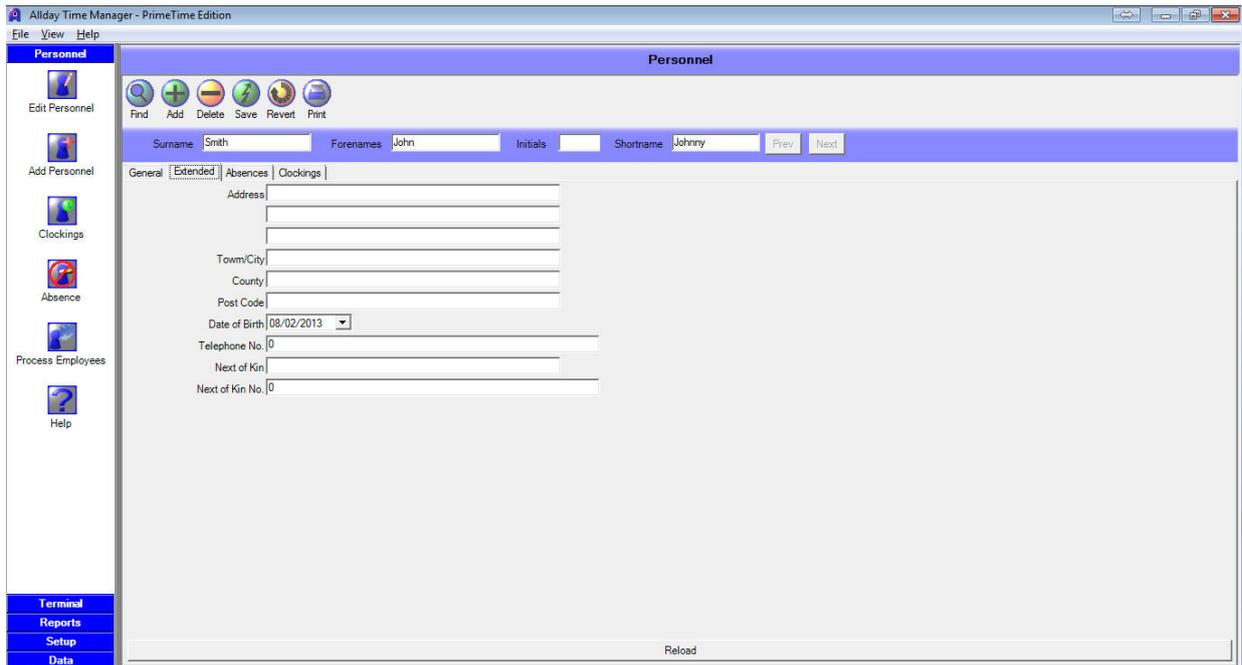
Clockings Tab

This tab will display the current employees' clockings and allow you to make any necessary changes. By default you will be shown all the timesheets (days) and clockings for the current week.

You can navigate this screen by using the arrow buttons, "<<" and ">>" will scroll in 4 week intervals, "<" and ">" scroll 1 week at a time. Alternatively by using the "Select Week" button you can select a specific week.
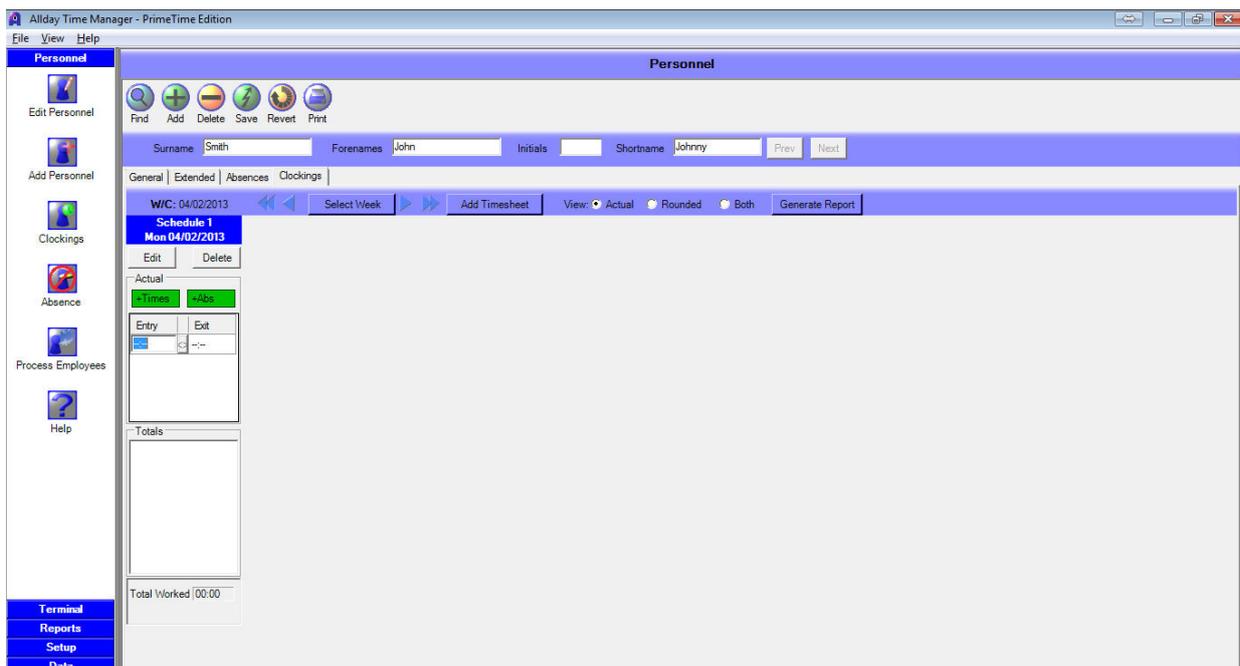
From within this tab clockings can be edited, deleted and if required added manually, should an employee be working off site for example.

Editing / Adding Clockings (Basic)

Step 1 : To add new clockings, simply click the "+Times" button on the timesheet. Then type the clockings into the '--:--' Entry and Exit fields, then click the 'Save' button at the top of the screen to confirm changes.

Step 2 : To Edit a clocking, click on the clocking you require to change, and type the new clocking time. Then, click the 'Save' button at the top of the screen to confirm changes.

Note: You can also use the TAB key to move between the Entry and Exit clockings on the timesheet, as well as confirm any changes made.

Editing / Adding Clockings (Advanced)

Step 1 :   To add or edit clockings, click "Edit" on the timesheet (day) you wish to modify.

Step 2 :   The "Edit Clockings" screen will now be displayed. To add a clocking, click the "Add" button on the right, alternatively to edit existing clockings select the clockings and click "Edit".

Step 3 :   The "Edit Period" window will now be displayed. Select "Advanced" and then enter or edit the employee's entry and exit times along with any required comments. Click "OK".
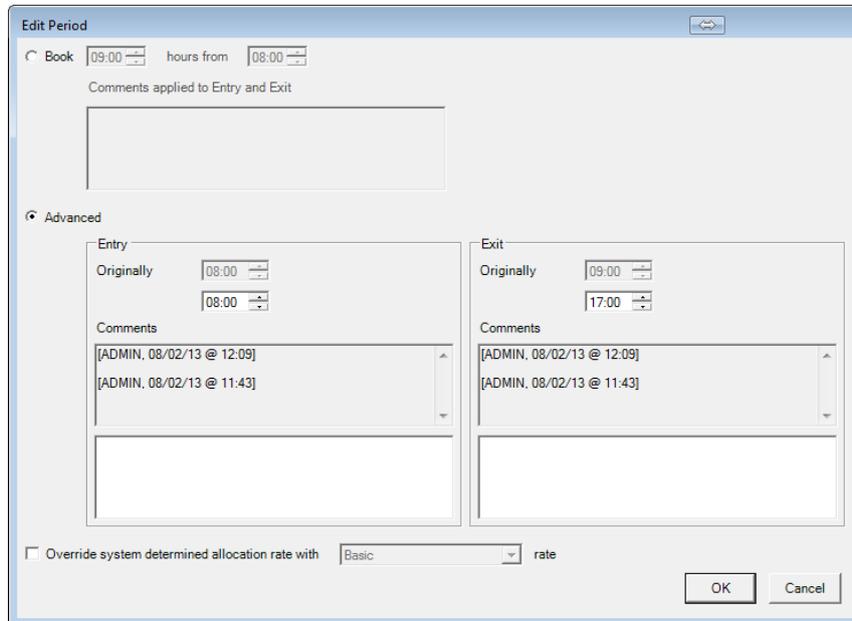
Step 4 :   The "Edit Clockings" window will be displayed once more. If everything is correct, click "OK". To make any further amendments to the times select the required clockings and click "Edit"

Step 5 :   The new clockings will be displayed on the timesheet (day) onto which they were entered as well as the Allday Time Manager reports.

Note: You will notice all clocking times are followed by a bracketed letter i.e. (C) or (M) these letters represent the nature of the clocking record and are explained on the last page of most reports by way of the key featured below.

A   -   *Auto-clockout time generated by software.*
M   -   *Manually entered time.*
E   -   *Normal clocking time that has been edited by user.*
C   -   *Normal clocking time. (possibly adjusted by shift settings for grace and rounding)*
H   -   *Start or end of a Holliday or Absence.*
S   -   *System created time, automatic break clocking or where payment rate changes during shift.*

Terminals

Terminal Setup

Step 1 :   Select the "Terminal" option from the side menu bar.

Step 2 :   Click the "Terminal Setup" button.
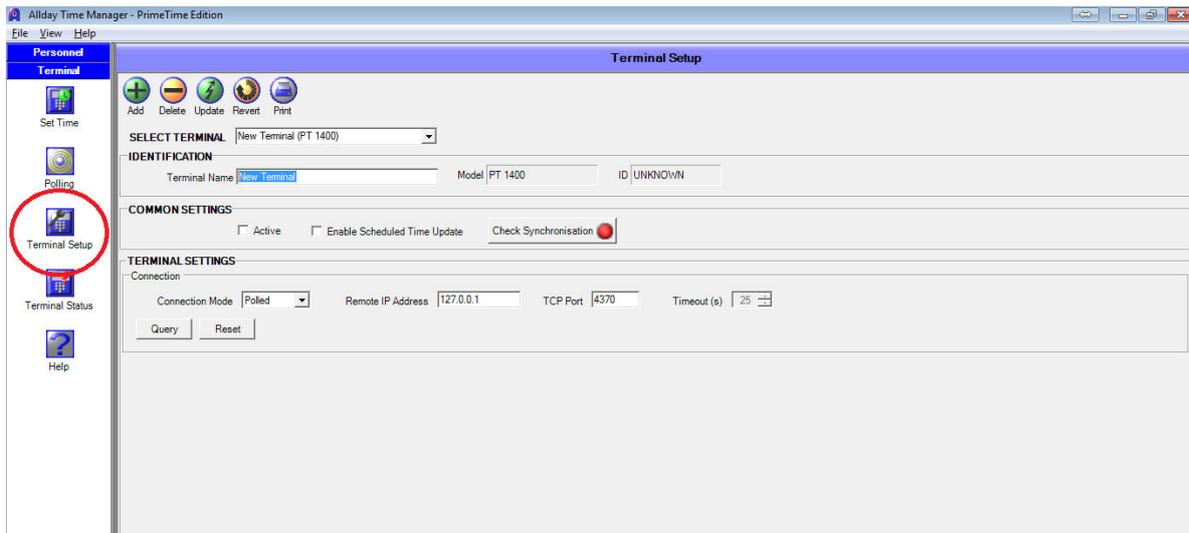
Step 3 :   Select the "PT 1400" terminal from the "Select Terminal" drop-down box.

Step 4 :   Add the IP address in the "Remote IP address" that you have set into your PT1400 clocking terminal. Then (making sure the "Active" box is ticked") click the Update button. Once this has been done, select the "Query" button to check communications. If you receive a message advising that the system was unable to communicate with the terminal, check the IP address you have put into your PT1400 Clocking terminal.

Step 5 :   Once you have successfully performed a "Query" on the terminal, you should see the ID field on the screen display a number. To finish, click the "Update" button again.

Terminal Polling

Step 1 : Select the "Terminal" option from the side menu bar.

Step 2 : Click the "Polling" button.
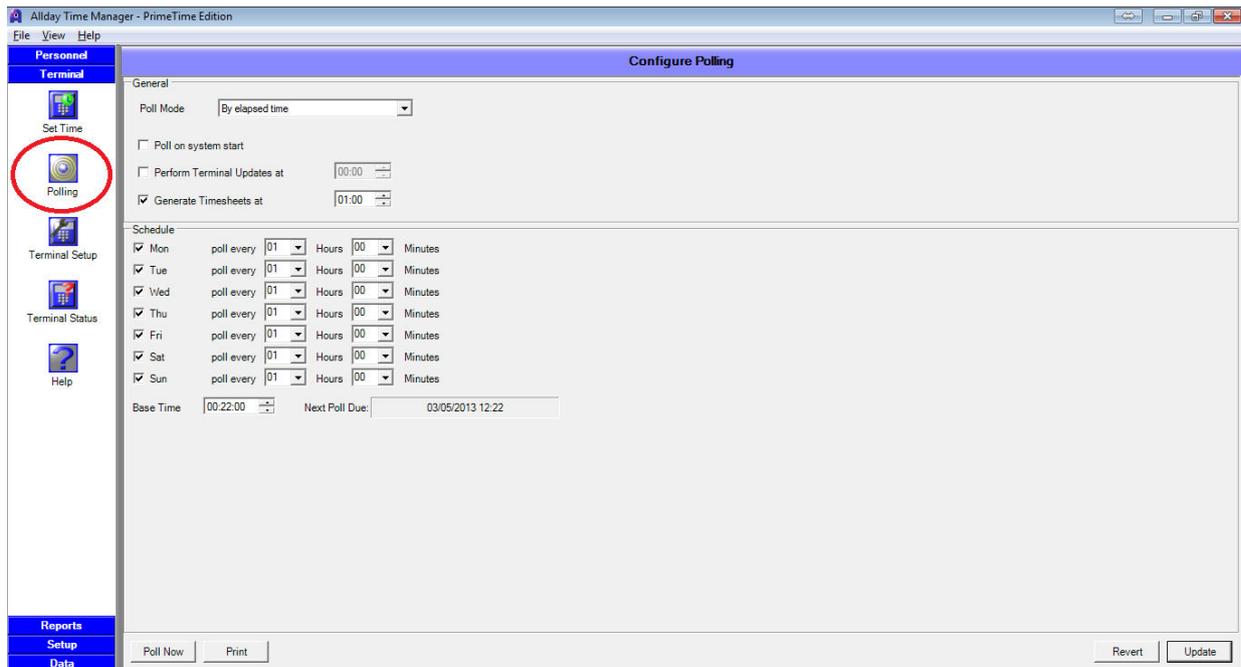
Step 3 : Select the Poll Mode you want to use (depending on whether you would like the system to Poll clocking from the clock in intervals, or at specific times). The most common option is "By elapsed time".

Step 4 : Tick the days you would like the terminal to be polled (usually this would be all seven days) and set how often or when you would like the system to bring clockings in from the Clocking Terminal.

Step 5 : Click on the "Update" button (in the bottom-right corner of the screen). This has now set how often the system will communicate with the PT1400 clocking terminal and bring any clocking performed on the terminal into the system.

Setting the time

Step 1 :   Select the "Terminal" option from the side menu bar.

Step 2 :   Click the "Set Time" button.
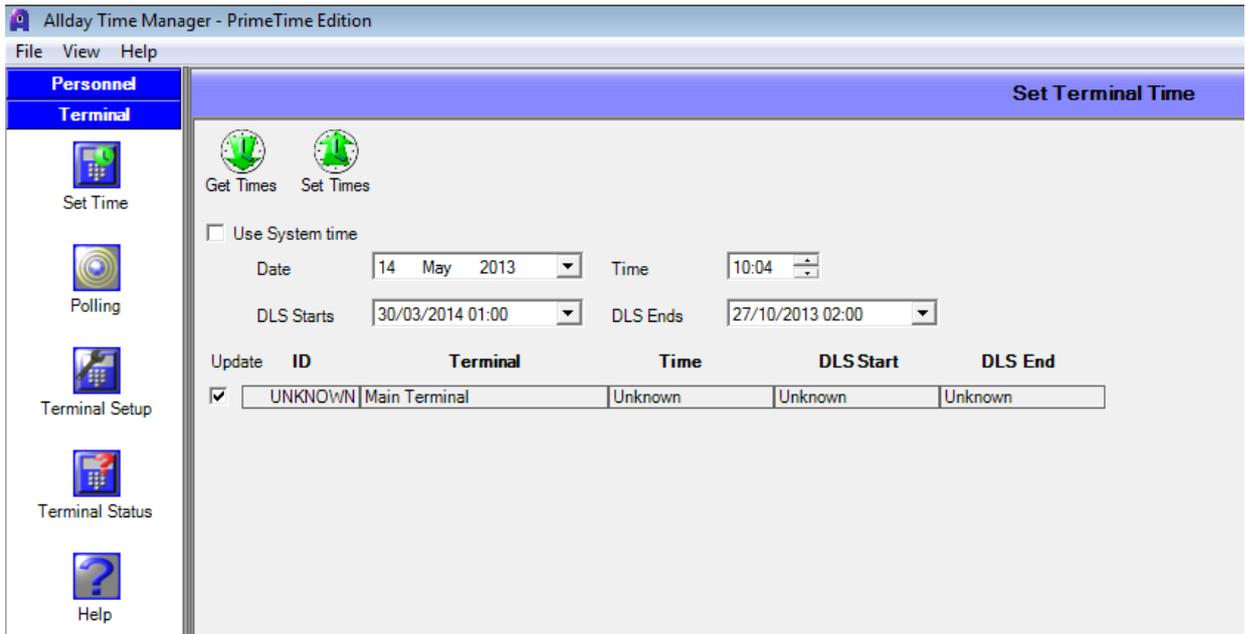
Step 3 :   Either set a time you would like to send the terminal, or if you would like to use your computers time, tick the "Use System time" box.

Step 4 :   Click the "Set Times" button. This will then update the time for the PT1400 Clocking terminal. You can also use the "Get Times" button to find out what time the Clocking terminal currently has.

Reports & Reporting

The Allday Time Manager Software has several reports to aid you in the management of your staff and their working habits, these reports range from displaying a list of your employees' daily totals to full attendance reports that detail the employees' attendance history including clocking times, weekly or monthly totals, and lateness etc.

Once again the report screen is split into separate tabs and the process of running each report is very similar, therefore this guide will concentrate on the key reports which you will use.

Attendance Report Tab

Attendance reports deal with the day to day coming and going of your employees, along with how many hours they have worked. These reports are the most commonly run reports and will provide you with all the information typically required for payroll.

Running the Full Period Details Report

Step 1 :   Select the "Reports" option from the side menu bar.

Step 2 :   Click "Personnel Reports" button.

Step 3 :   Select the "Attendance" tab from the top of the screen.
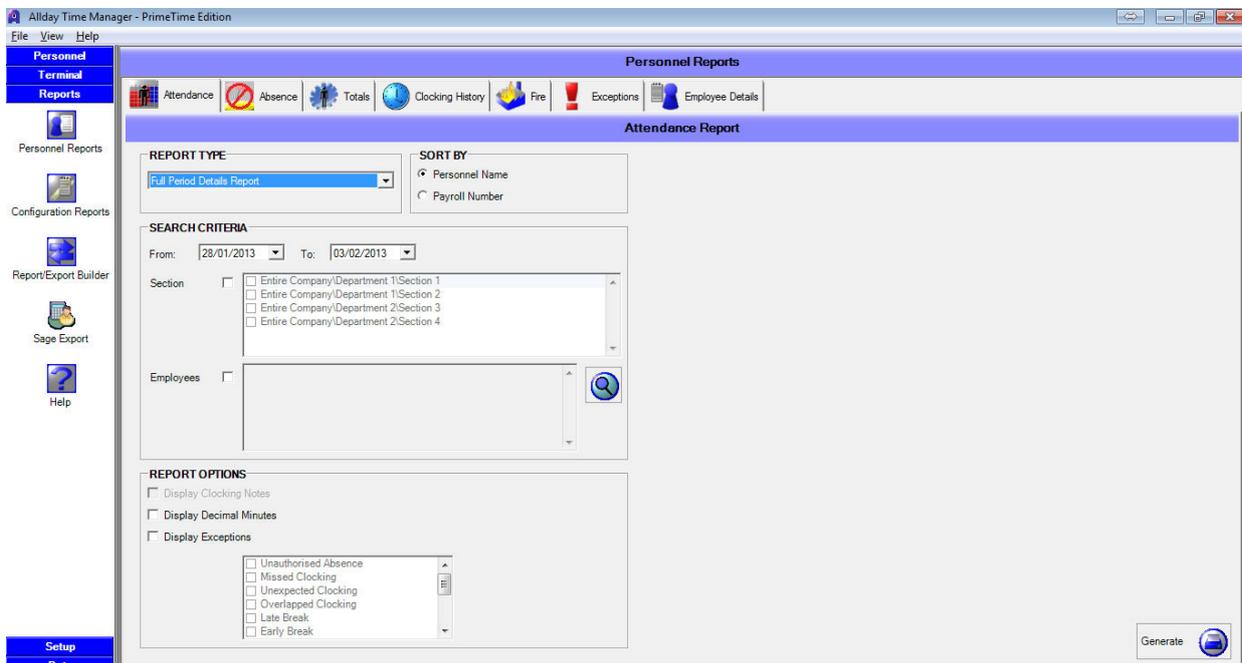
From here you will be required to select the report type and the date range; all of the other selections are optional.

Step 4 : Select the "Full Period Details Report" from the drop down list. This report will show you the clocking times, totals and absences for each day in the payment period and for each selected employee.

Step 5 : Set the period date range required, multiple periods can be displayed simply by increasing the date range. The last page of this report will display a report total, allowing you to see at a glance the combined totals for overtime, absences etc for the entire report.

Note: If you are running a periodical report such as the "Full Period Details Report" the "From" and "To" dates will need to cover the whole payment period. Therefore if your working week starts on a Monday and finishes on Friday, a weekly period report would need to run from Monday to Sunday.

Step 6 : If required the report can be filtered in order to be more specific and display only the information for certain sections or employees. This is achieved by using the appropriate option under the "Search Criteria" heading, if no selection is made all employees you have permissions to see will be displayed on the report.

Step 7 : Again if required you can choose to display any exceptions that have occurred during this period, these include instances when the employee has forgotten to clock or has had an unscheduled / unreported absence. Simply select "Display Exceptions" to display all recorded exceptions or use the additional tick boxes to select only the exceptions you are concerned with.

Allday Time Manager
Full Attendance Report

Name	Section	Shift	Payroll No
Bloggs, Joe	Allday Time Systems\Systems Workshop\All Staff	Weekly Main Shift	1001

Period:- 28/06/2010 to 04/07/2010 | Signed by | EMPLOYEE:- | MANAGER:-

Date		In	Out	In	Out	In	Out	In	Out	Target	Actual	Bal.	Absence
Mon	28/06	09:04(M)	17:00(M)							08:00	07:45	-00:15	
Tue	29/06	09:00(M)	17:00(M)							08:00	08:00	00:00	
Wed	30/06									08:00	08:00	00:00	Holiday
Thu	01/07	09:00(M)	17:00(M)							08:00	08:00	00:00	
Fri	02/07	09:00(M)	17:00(M)							08:00	08:00	00:00	

Weekly Total | 040:00 | 039:45 | -000:15

Notes:-

	Target	Actual	Bal.
Period Totals	040:00	039:45	-000:15
Balance from previous Period			000:00
Accumulative Balance			000:00
Balance carried to next Period			000:00

Category Pay Totals			Additions:-
Category	Total	Pay Total	
Basic	039:45	039:45	

Absences for this period

Category	From	To	Days	Hrs this period
Holiday	30/06/2010	30/06/2010	1.00	008:00

Group Absences for this period

Exceptions for this period (if selected)

Date		Time	Description	Resolved
Mon	28/06/10	09.15	Late Entry	✗

Exception Report

The exceptions report helps you to determine if there are any adjustments you need to make such as manually adding any missed clocking times, booking sickness etc. It will also aid you in indentifying the need to discipline employees in regard to lateness, should your setup allow for this.
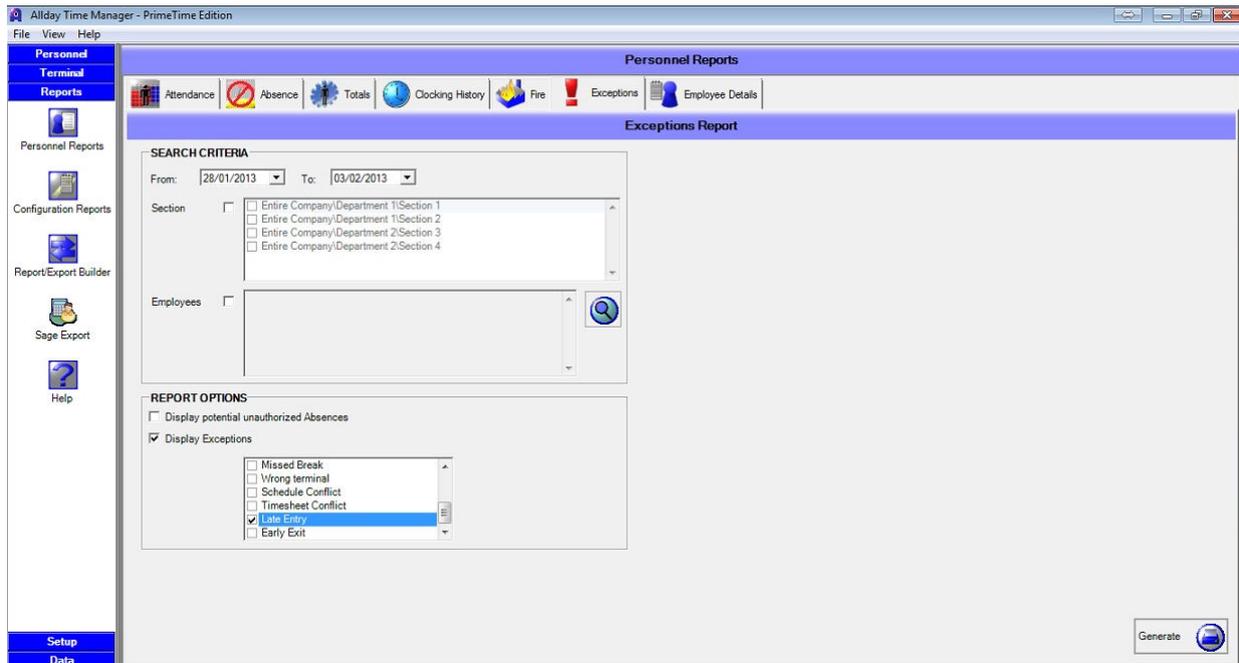
Running the Exception Report

Step 1 :   Select the "Exceptions" tab from the menu at the top of the screen.

Step 2 :   Select the date range that the report is to cover.

Step 3 :   To create a more focussed report it is possible to create it for either a certain section/s or for individual employees.

Step 4 :   Select the exceptions that you wish the report to display e.g. Late In, Missed clocking.

Allday Time Manager
Exception Report

Employee	Date	Processed Time	Exception	Resolved
Bloggs, Joe	Mon 28/06/2010	09:15	Late Entry	✗

Note: The exceptions available depend on your working patterns and therefore you may find that not all exceptions are available. Also certain exceptions can be customised to suit your needs. Please contact the helpdesk should further information be required.

Report/Export Builder

You can also create your own bespoke reports using the Report/Export builder, as well as export information into an Excel spreadsheet or CSV file. To do this, go to the "Report/Export Builder" feature (within the 'Reports' section). One the left-hand side of the screen you can create your own Export Files, by clicking the "Add Export" button, then clicking "Edit" to then tick what information you would like to export. There are two different lots of information to choose from, depending on which type "Data Type" you select. "Daily" data will provide you with daily clockings, daily totals etc. The "Period" data type will cover totals for the week as well as other related information.

To create your own bespoke reports, simply select the "Report Builder" option on the right-side of the screen and follow the above instructions. Please remember that you will need to set the From & To dates for the beginning until the end of the week(s), if you are trying to export or open your own report, for "Period" data.Shifts & Schedules

Shifts

In your Allday Time Manager Primetime, you will have a shift pattern (entitled "Shift 1"), and seven preset schedule's which you can amend. Below will give you some guidance in how to change the settings within the schedule's, as well as how to apply schedule's to the shift pattern. For more Shift patterns & schedule's, please call us on 01252 544457 to discuss upgrading your system to the Lite or Professional Edition.

Schedule's

To amend the settings within a Schedule, follow the below steps:

Step 1: Go to the 'Setup' section and select the 'Schedules' button on the left-hand side of the screen.

Step 2: From the drop-down box next to "Description", select the schedule you would like to edit.

Step 3: Set the "Earliest Start", "Standard Start", "Standard Finish", and "Latest Finish" time you would like to set for the schedule. Employee's can clock, but will not be paid before/after the Earliest Start/Latest Finish time's set. The "Standard Start" & "Standard Finish" times are the usual times the employee's are due to start & finish the shift.

Once done, you can also set the "Schedule End" time to tell the system when the end of the working day for the schedule is.
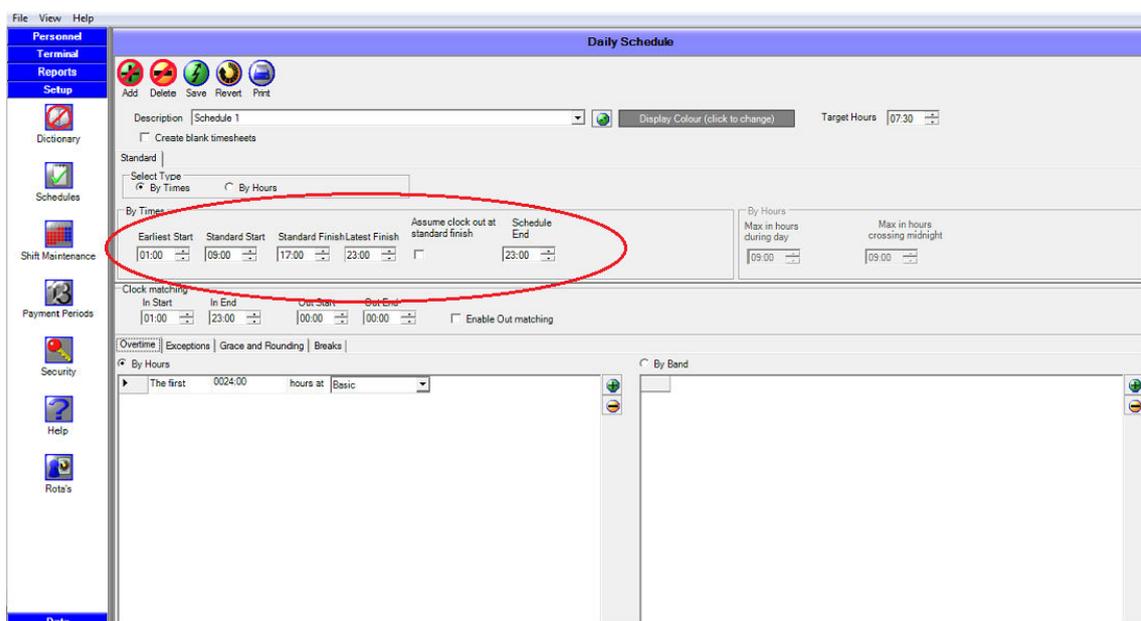
**Step 4:** If you are setting more than one schedule per day, and would like the system to attempt to determine which schedule the employee is working by the employee's clockings for that day, you can set the "Clock matching" In Start & In End time's, to encapsulate the approximate time the employee will be clocking for this shift. If this is the only schedule for the day, you can simply set these times to "In Start: 01:00", "In End: 23:00".

Step 5: Towards the bottom of the screen, you will see four different tabs. These are "Overtime", "Exceptions", "Grace and Rounding", and "Breaks" (the screen will default to the "Overtime" tab). Amend the settings to suit how you would like to schedule to work.

Overtime Tab

This tab can be used to set what pay rates to pay the employee for the day for this schedule. Within this tab you have two different ways for the system to determine what hours an employee is working for the schedule, namely "By Hours" or "By Band". If setting "By Hours", allocate how you would like the first 'X' amount of hours to show in the reports. Then, if you want to add how the hours show after the first amount of hours, simply click the + button to the right of the screen (see screenshot below). You can now add "The next" 'X' amount of hours at a different rate (e.g. OT).
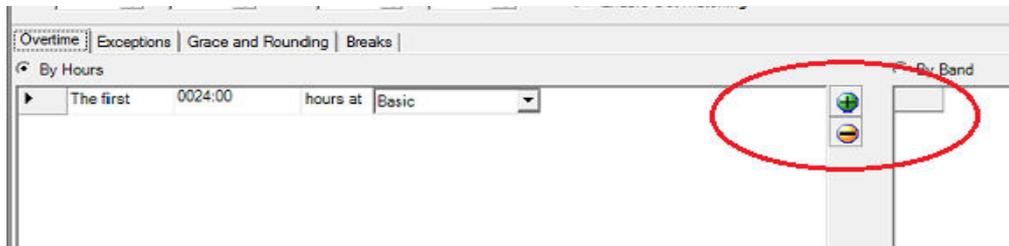
There is also a more advanced method you can use, known as Time Banding. You can select this by clicking on "By Band". Here you can set times of the day to show a specific rate. For example, you can set 01:00 – 07:00 at OT, then 07:00 – 17:00 at Basic, then 17:00 – 23:00 at OT. Simply click on the + button on the right-hand side (similar to the above) and add the Time Bands you require.

Exceptions Tab

Here you can tick and Exceptions that you would like the system to flag, for this schedule. These include Missed Clocking, Late Entry, and Early Exit. For Late Entry & Early Exit, simply set the time's you would like the Exceptions to come into effect.

Grace and Rounding Tab

If you would like the system to round any clocking's for the current schedule (e.g. to 15-minute intervals), simply tick the 'Use Roundings' box. You can then set what times you would like these roundings to take effect (usually, this would be from your 'Earliest Start' to your 'Latest Finish' time).

You can also include a Grace Period for either In, Out, or both clockings. So if you had 15-minute roundings in place, with a 3-minute grace period (for Both In & Out clockings), the employee would be able to clock up-to 3 minutes past each 15-minute interval, before his clocking is rounded forwards to the next 15 minutes. If set to 'Both', the employee can also clock up-to 3 minutes early from the 15-minute interval before their clocking is brought back to the previous 15-minute interval. Grace Period's are set in the same way as the Roundings.

Breaks Tab

To set a Break onto the schedule, select the Breaks Tab and tick the 'Use Breaks' tick-box. You can then choose the type of break you would like to set, a description of that break, and what time period you would like that break to be in effect for. You can also then set the length of the break, as well as any rules for if the employee did not clock for that break (e.g. if your employee's do not clock for breaks, you can set the system to automatically deduct the break by setting "If Missed" to Deduct the length of the break. You can also mark whether the break is a paid break or not (you should only need to enter a Paid break into the schedule if the employee's are required to clock for that break).

Step 6: Once you are happy with the settings within the schedule, simply click the 'Save' button at the top of the screen. You can now proceed to add this Schedule into your shift, using the "Shift Maintenance" button.

Shift pattern

Once you have amended a Schedule, you can now enter this onto a shift pattern. From the "Shift Maintenance" screen, you will see the days of the week, with a Schedule under each day. To add a schedule to the pattern, simply left-click on that schedule, and drag-and-drop the schedule into any days you would like that schedule to apply within the Shift Pattern.

To remove a schedule from the shift pattern, simply do the reverse of the above. Select the schedule from the day you would like to remove that schedule from, and drag-and-drop the schedule into the picture of a bin in the top-right corner of the screen. Please note that this is only to remove that schedule from a day, and will not delete any schedules.

> You can also change how many days your Shift Pattern includes. For example, you can set a 14-day Shift Pattern, with different schedules for the first week, from the second week (creating a two-week rotation shift) by amending the "Pattern Length" option in the bottom-right corner of the screen to 14 (days). You can also change what day of the week your Shift Pattern starts from, by changing the day of the week from the "First day" drop-down box.

Sage Export

Setup

To set up the Sage Payroll Export feature, follow the below steps:

Step 1 : Go to the 'Reports' section and select the 'Sage Export' button on the left-hand side of the screen.

Step 2 : Select the "Setup Export To Sage Pay" tab.
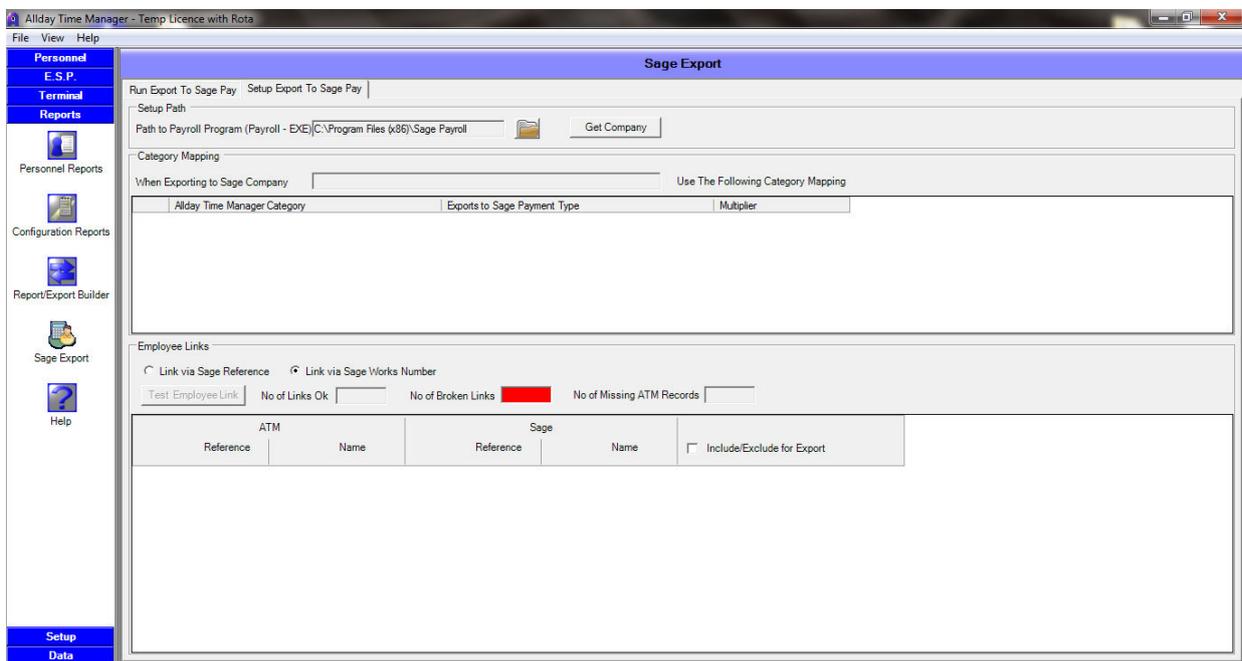
Step 3 : Select the Folder Icon and point to Payroll.exe in your local Sage Payroll Export folder (e.g. C:\Program Files\Sage Payroll). Then click on "Get Company" and select the company you would like to export the data to and click 'OK'.

Step 4 : In the "Category Mapping" field, set the Pay Categories from within Allday Time Manager and pair those with what field you would like these to match up with in Sage Payroll. You can also apply a Multiplier to those values, or you can do this from within Sage Payroll.

Step 5 : In the "Employee Links" field, choose whether you would like to link the employee's between Allday Time Manager and Sage Payroll via their Sage Reference/Payroll number, or via the employee's Sage Works Number. Once done, you can click the "Test Employee Link" button to check that the employee's are linking correctly. If they are not, you will need to go to the employee's records to edit their Payroll Number to match the Reference or Works number you are linking to in Sage.

Exporting

Once you have successfully set up your Sage Payroll Export, you can then perform an Export into Sage by following the below steps:

Step 1 : Go to the 'Reports' section and select the 'Sage Export' button on the left-hand side of the screen.

Step 2 : Select the "Run Export to Sage Pay" tab.

Step 3 : From the "Export to Sage Company" dropdown box, select the company you would like to Export into.

Step 4 : Select the Date Range you would like to run the export for, then select whether you would like to export Period Totals, or Daily Totals.

Step 5 : To preview and edit the data you are trying to export, select the "Preview Export" button. This will then generate a preview below of what is to be exported. You can then edit the totals to what you would like, then select the "Run Export" button.

Routine Maintenance

The following check list is simply to give you an idea of the typical routines you may wish to adopt, but obviously you are free to run the system in any way that best suits your needs or habits.

Daily

- ✓ Run exceptions report to check for missing clocking times etc for the previous day.

- ✓ Run potential unauthorized absences report for previous day.

Weekly

- ✓ Run exceptions report to check for missing clocking times etc for the past week.

- ✓ Run potential unauthorized absences report for previous week.

End of Pay Period

- ✓ Run exceptions report to check for missing clocking times etc for the previous period.

- ✓ Run potential unauthorized absences report for previous period.

- ✓ Perform backup of entire database for the period ending.

Bi Annually

- ✓ Check that shift times are still appropriate.

- ✓ Check ATM user access list- delete users as necessary.

Annually

- ✓ Delete surplus employees.