Allday Time Manager Professional Edition User Guide

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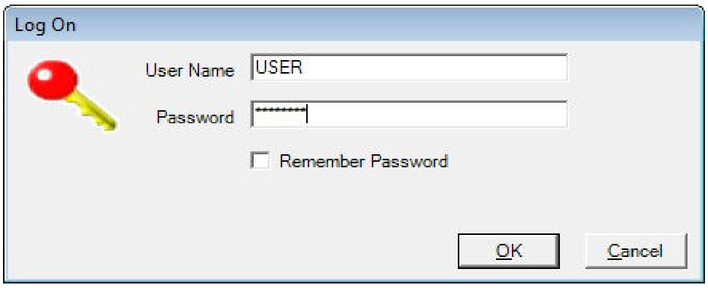
Starting Allday Time Manager

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.



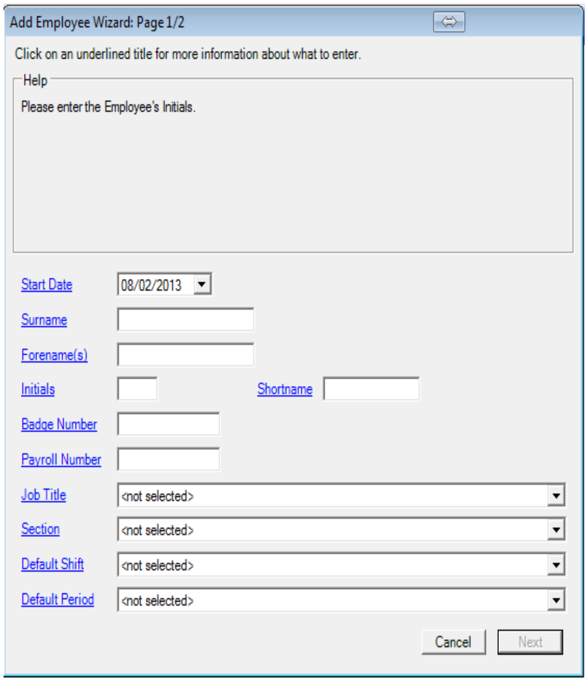
Step 2 : Select the "User Name" field and enter 'USER' as your user name. Note that The user name field is always displayed in uppercase regardless of caps lock or shift keys.

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.

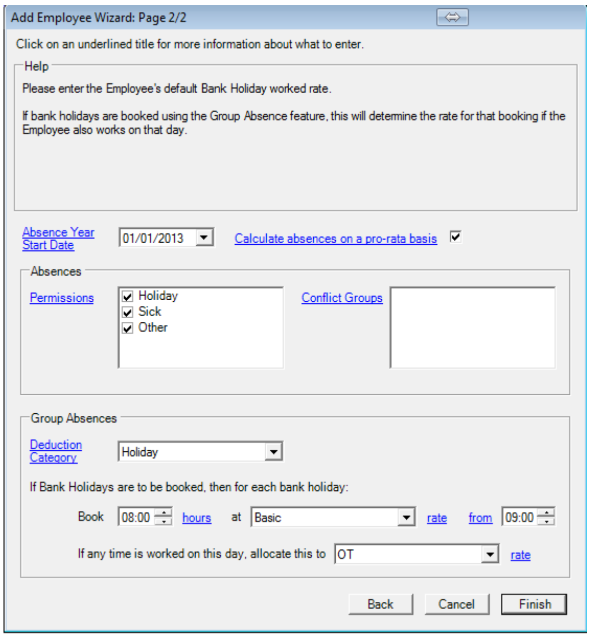


Step 1 : Click "Add Personnel" from the "Personnel" side menu bar

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. Firstly, select when your Absence Year Starts (when your Holiday entitlement "resets"). Then untick any Absence types that you would not like the employee to be booked off for. Finally, set what hours you would like to book off when booking a bank holiday.

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

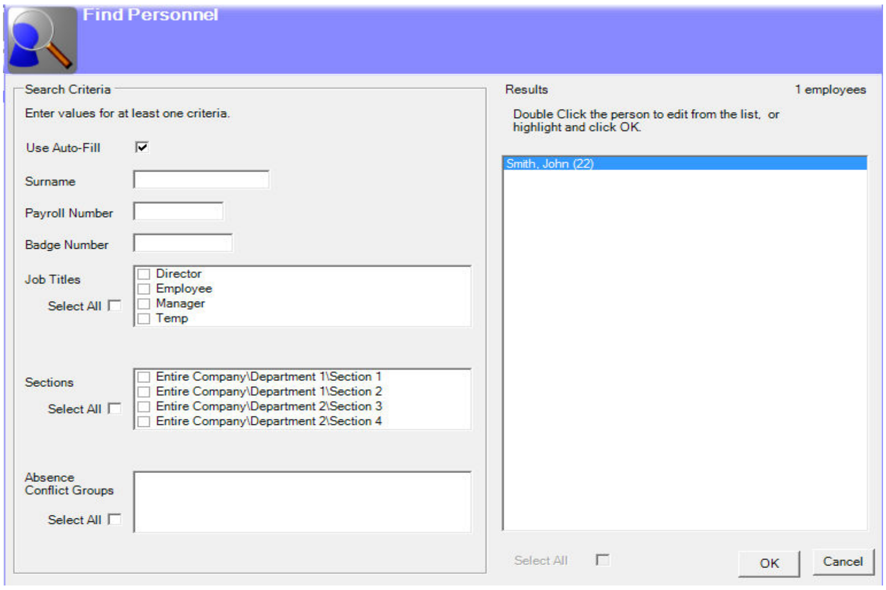
All the employees' information such as their personal details, shift pattern, absences and clocking times are stored within their personnel record. This is accessed from the "Edit Personnel" button located on the "Personnel" sidebar menu.

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.



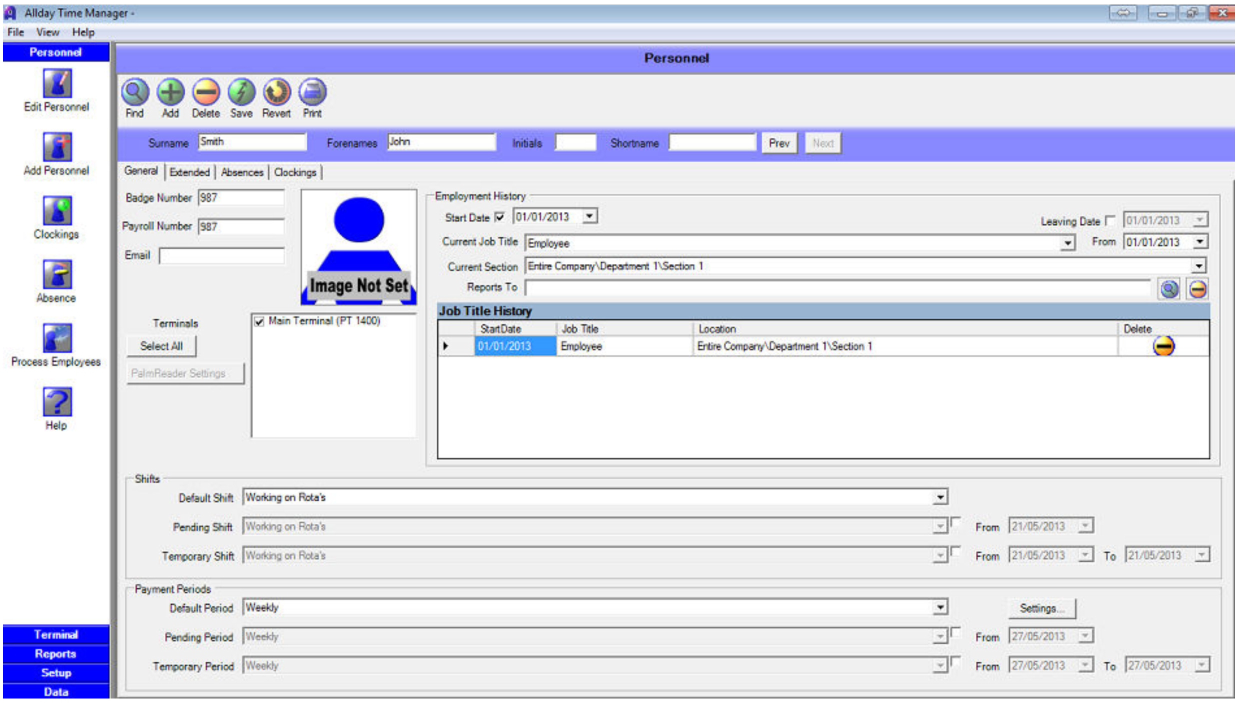
At this point you can either select the employee from the results list or start typing into the Surname, Badge or Payroll number fields to filter the results. You can also use the selection box boxes provided to filter the results further.

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.



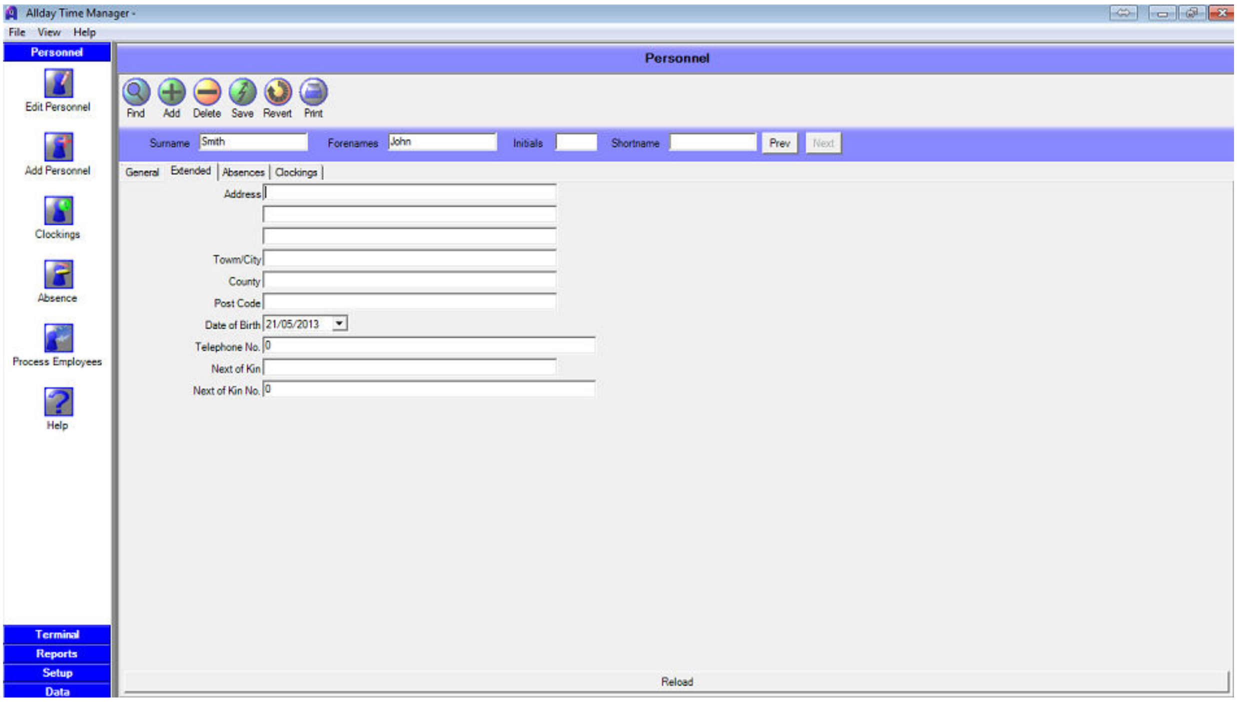
You will find that most of the information on the personnel record was completed during the "Add Employee Wizard". If you need to edit these for any reason, select the applicable field edit the information and click the "Save" button to update the record.

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.

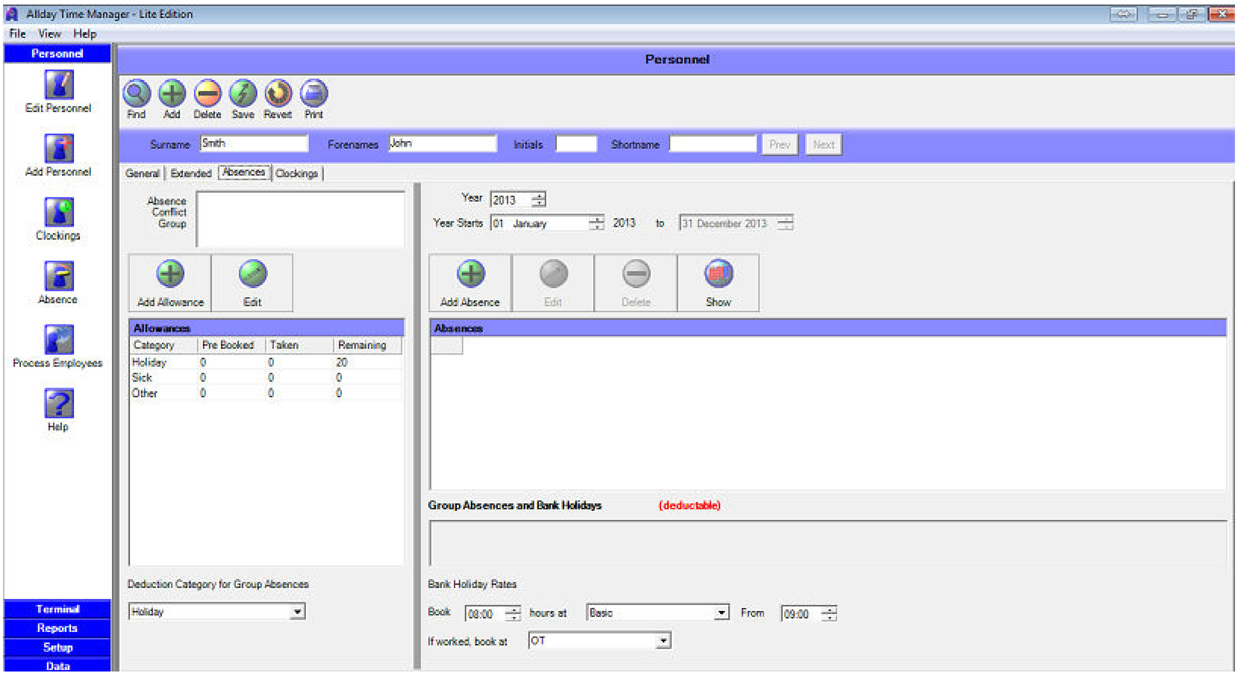
Extended Information Tab

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.



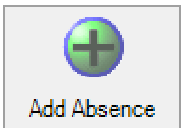
Absences Tab

The absences tab allows you to book an absence, view and edit absences that are already booked and view remaining absence entitlements for the current employee.
You can also book an absence for the whole site, department or section from within the "Add Absence" wizard.



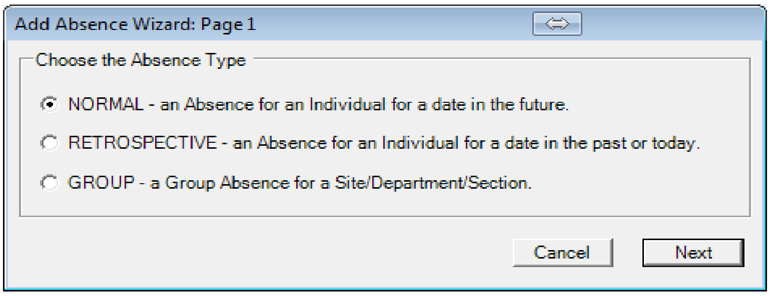
Adding Absences

Step 1 : To add a new absence, click the "Add Absence" button on right hand section of the absence screen.

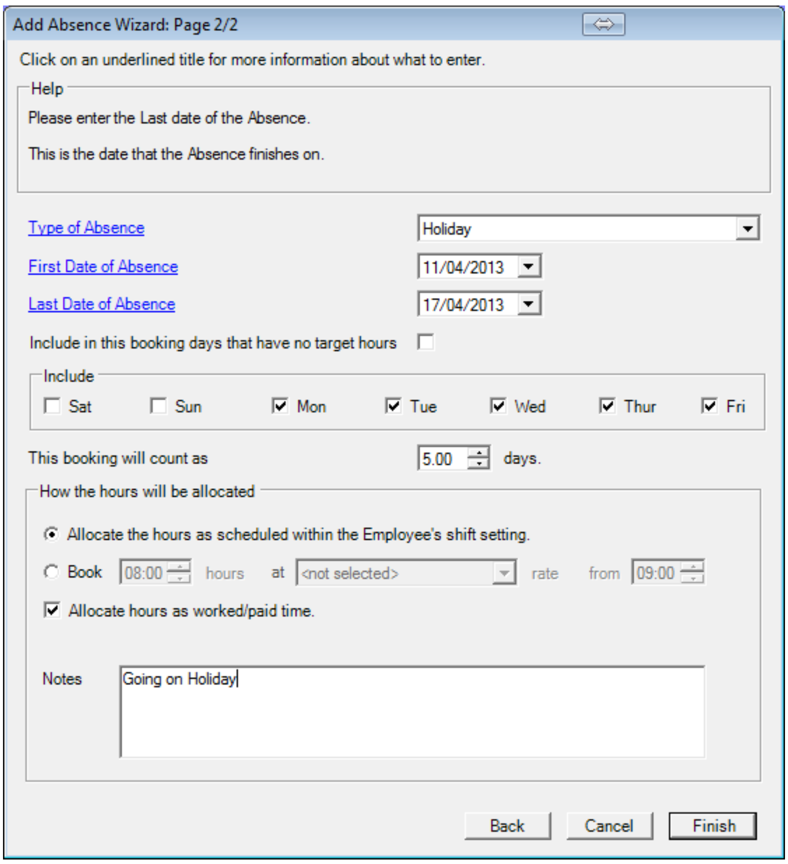


The "Add Absence Wizard" will now appear.

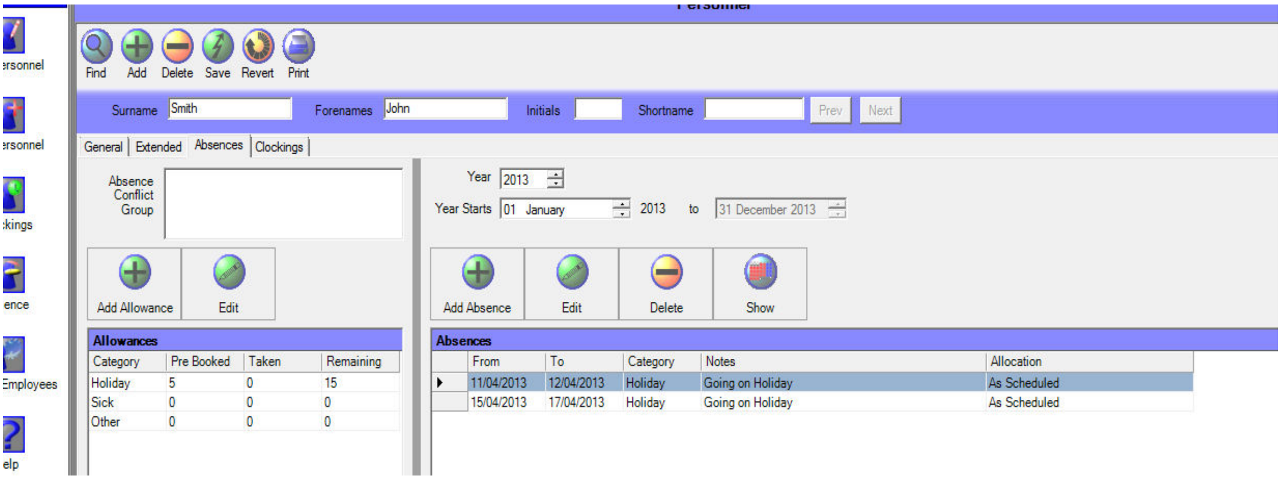
Step 2 : Select whether or not the absence is a “Normal Absence” – in the future; a “Retrospective Absence” - in the past or a “Group Absence”. Then click “Next”.



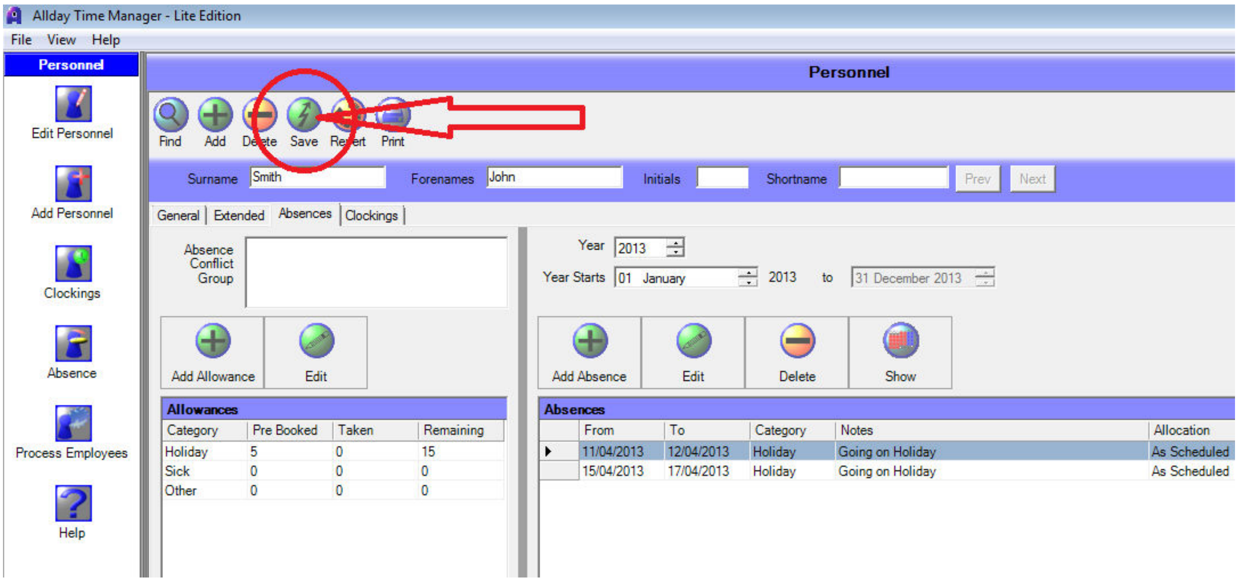
Step 3 : Page 2 of 2 of the Wizard will then be displayed. Select which type of absence you would like to book, select the date range and specify how many days you require. You can then allocate the employees standard working hours for the holiday calculation or specify a different amount of hours to be booked at a certain rate from a certain time. Lastly you can chose whether this absence is paid or not by ticking/unticking the “Allocate hours as Worked/paid time”. Below is an example of how you could book a holiday.



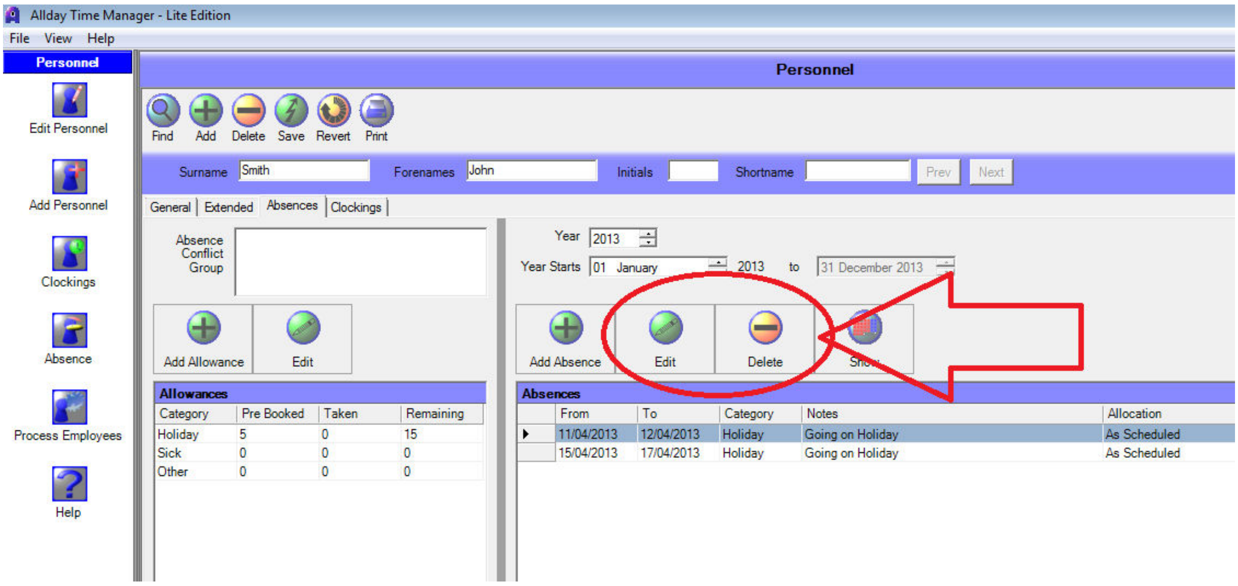
Step 4 : You should then be able to see the absence on the main "Absences" tab (in this example the absence spans over two weeks so shows as two separate absences, to allow you to edit or delete either part of the absence).



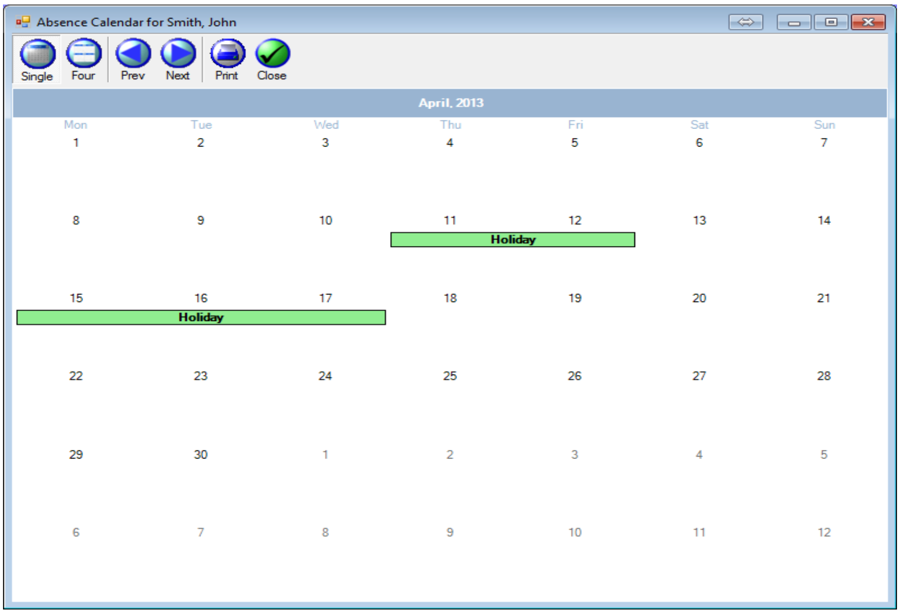
Step 5 : Now click the "Save" button to update the employees record.



Step 6 : Should you wish to edit or delete an absence, simply highlight the absence required and click either the "Edit" or "Delete" button.



Step 7 : The "Show" button will enable you to see the current employees' holidays / absences on in a Calendar view.

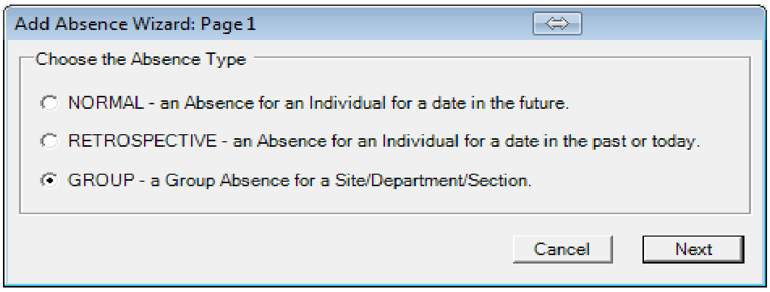


Adding Group Absences

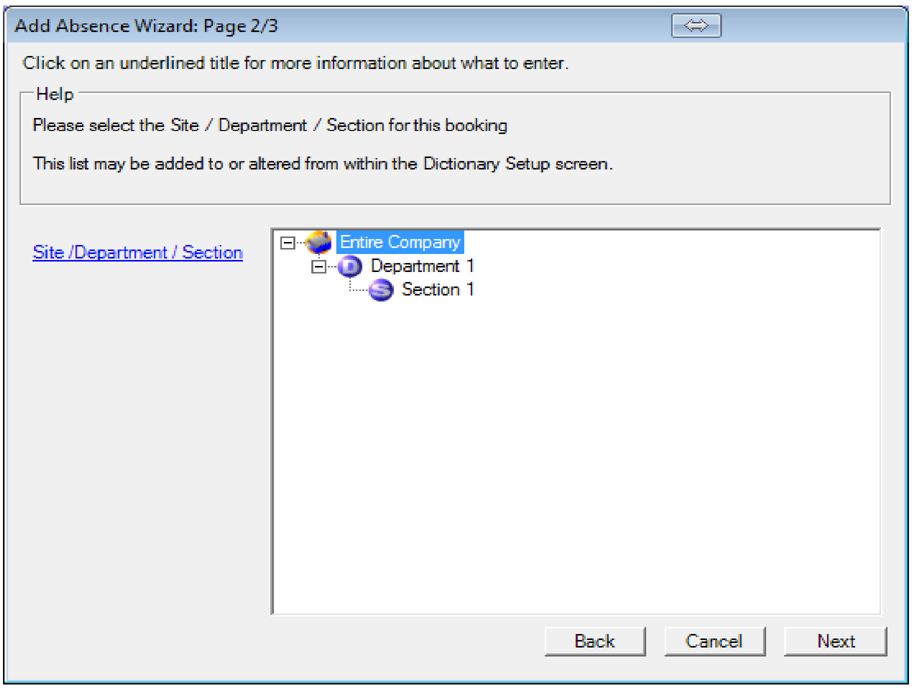
As mentioned previously you can also book an absence for the whole site, department or section from within the "Add Absence" wizard. The same principle applies however the screens you will be presented during the wizard are slightly different.

Step 1 : As before click the "Add Absence" button on the right hand section of the absence screen.

Step 2 : Select "Group Absence" and click "Next".



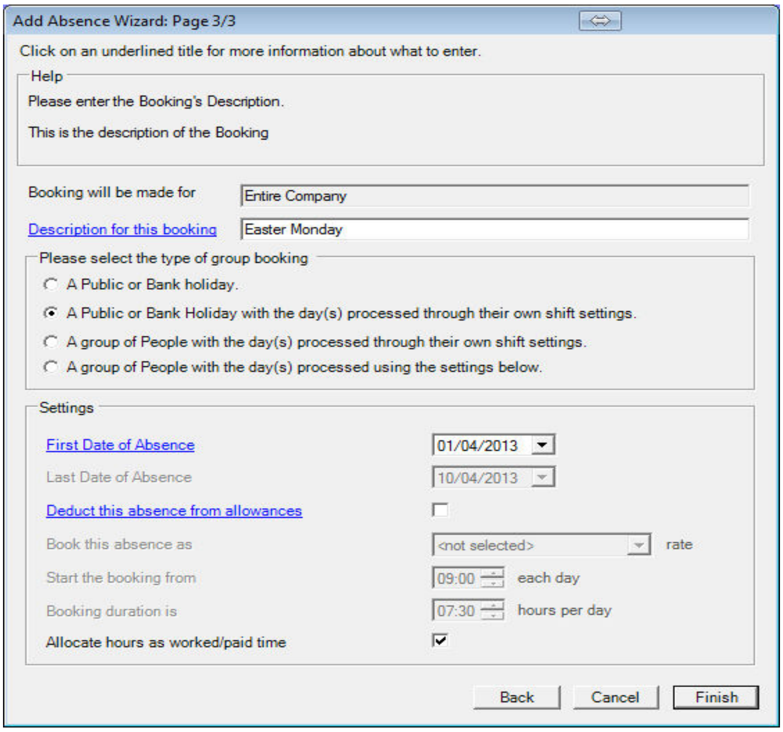
You will now be presented with the "Site/Department/Section" tree.



Step 3 : Select the required Site, Department or Section you wish to book an absence for and click "Next". Absences booked at Site or Department level will automatically be booked for the sub levels within them.

Note: You will only be able to book "Group Absences" for sites, departments and sections that your user login has permissions for, should the "Next" button remain greyed out when you select a section or the required site / department does not appear please contact your Allday Time Manager administrator or the helpdesk for further assistance.

Step 4 : On Page 2 of the wizard enter a description for the "Group Absence" you are booking and select the type of group booking required.



A Public or Bank Holiday –This option uses the Bank Holiday details specified on each employee record under "Group Absences" to determine what to apply to the employees clocking record.

All you need to specify for this type of absence is:-

The date of the bank holiday.

If the absence is deducted from the employees holiday entitlement.

If the absence is paid or not.

A group of people processed though their shift settings– Typically used during company shut-down periods. This option uses the employees shift details to determine what to apply to the employees clocking record.

All you need to specify for this type of absence is:-

The date range of the absence.

If the absence is deducted from the employees holiday entitlement.

If the absence is paid or not.

A group of people processed using specified settings – This is used when booking an ad hoc absence that does not adhere to any of the standard settings. This option uses the details specified at the time of booking to determine what to apply to the employees clocking record.

For this type of absence you will need to specify:-

The date range of the absence.

If the absence is deducted from the employees holiday entitlement.

What rate to apply this absence to?

What time each day to apply this absence from?

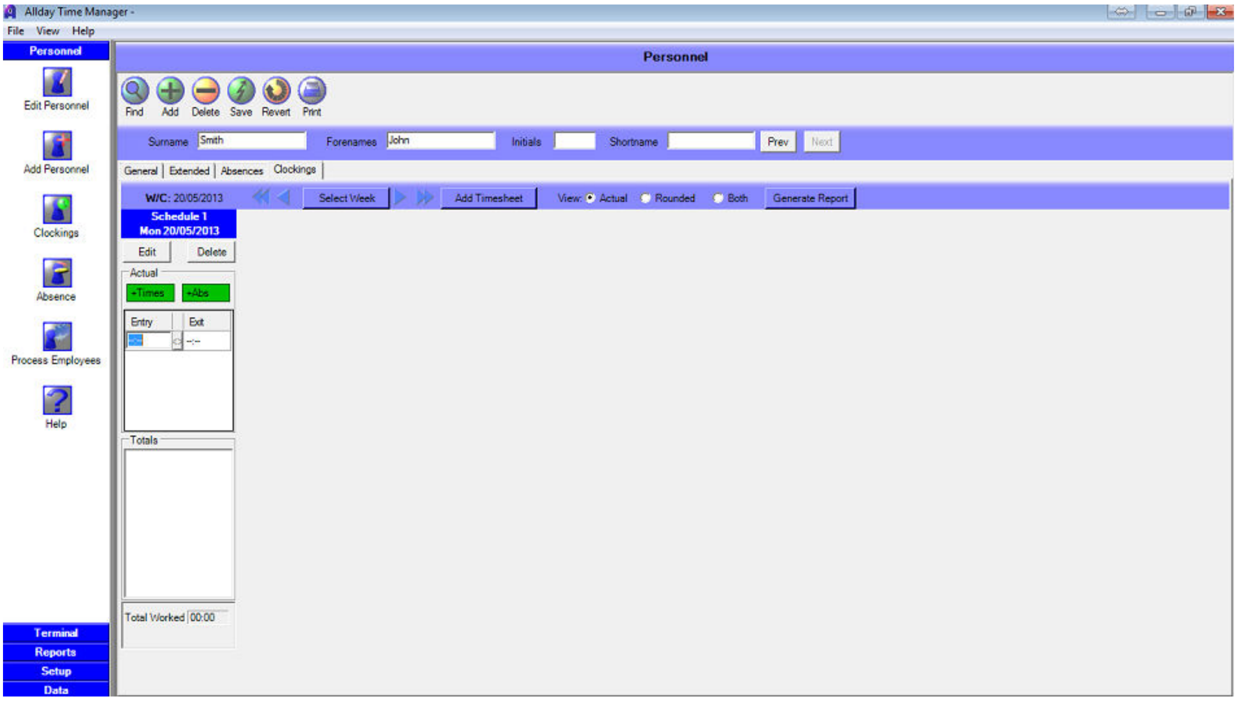
How many hours each day to apply.

If the absence is paid or not.

Step 5 : Click "Finish", all group absences applicable to an employee are displayed on the bottom section of the employees "Absence" tab. These are highlighted in red if they affect the employees' holiday entitlement.

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.

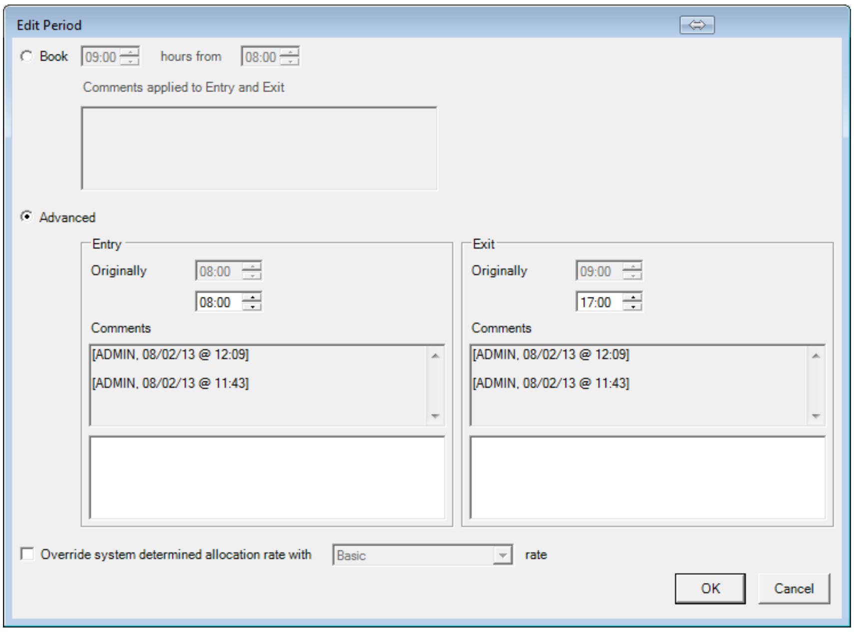
Note: You can also use the TAB key to move between the Entry and Exit clockings on the timesheet, as well as confirm any changes made.

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.*

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

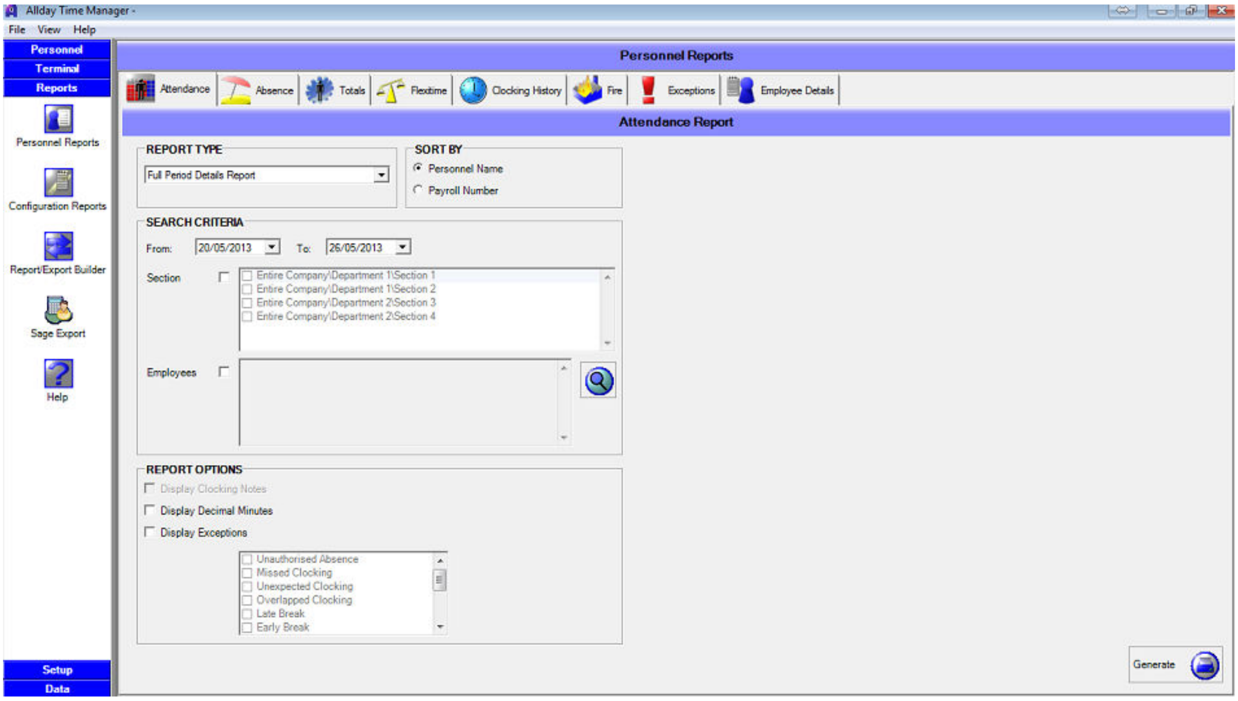
Attendance reports deal with the day to day coming and going of your employees, along with how many hours they have worked. These reports are the most commonly run reports and will provide you with all the information typically required for payroll.

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.

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:-

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

Category	*Total*	*Pay Total*
Basic	039:45	039:45

Additions:-

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	x

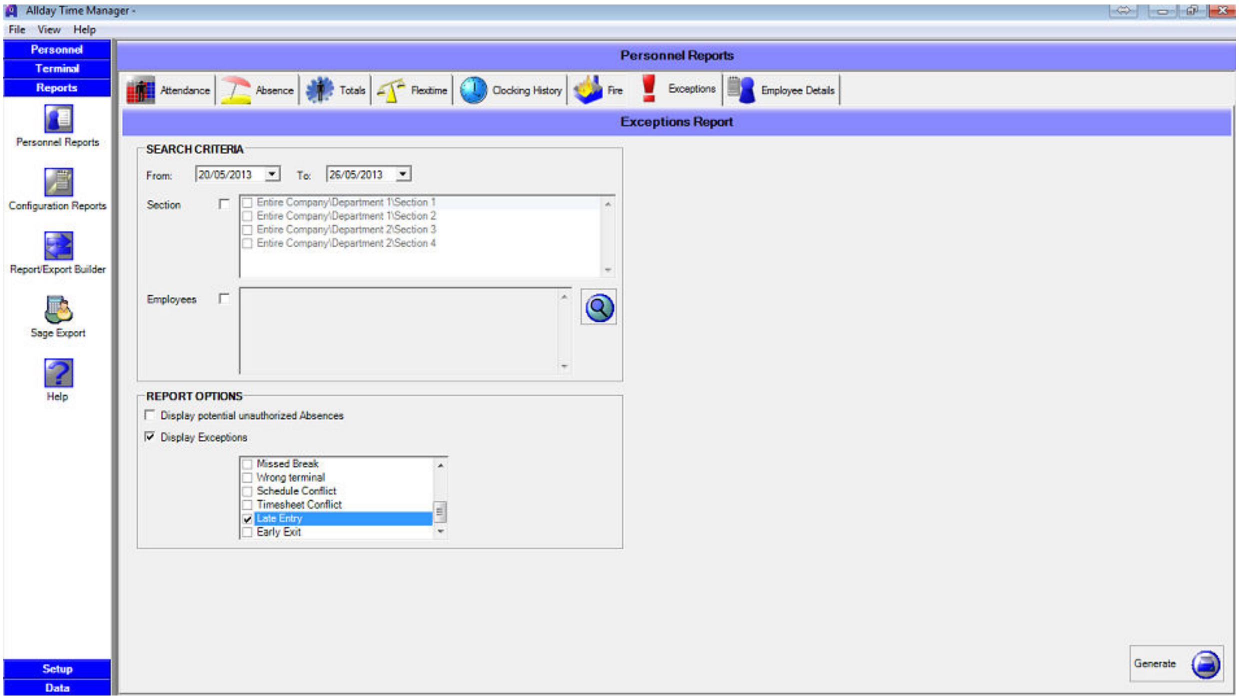
Step 7 : Again if required you can choose to display any exceptions that have occurred during this period, these include instances when the employee has forgotten to clock or has had an unscheduled / unreported absence. Simply select “Display Exceptions” to display all recorded exceptions or use the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

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 identifying 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

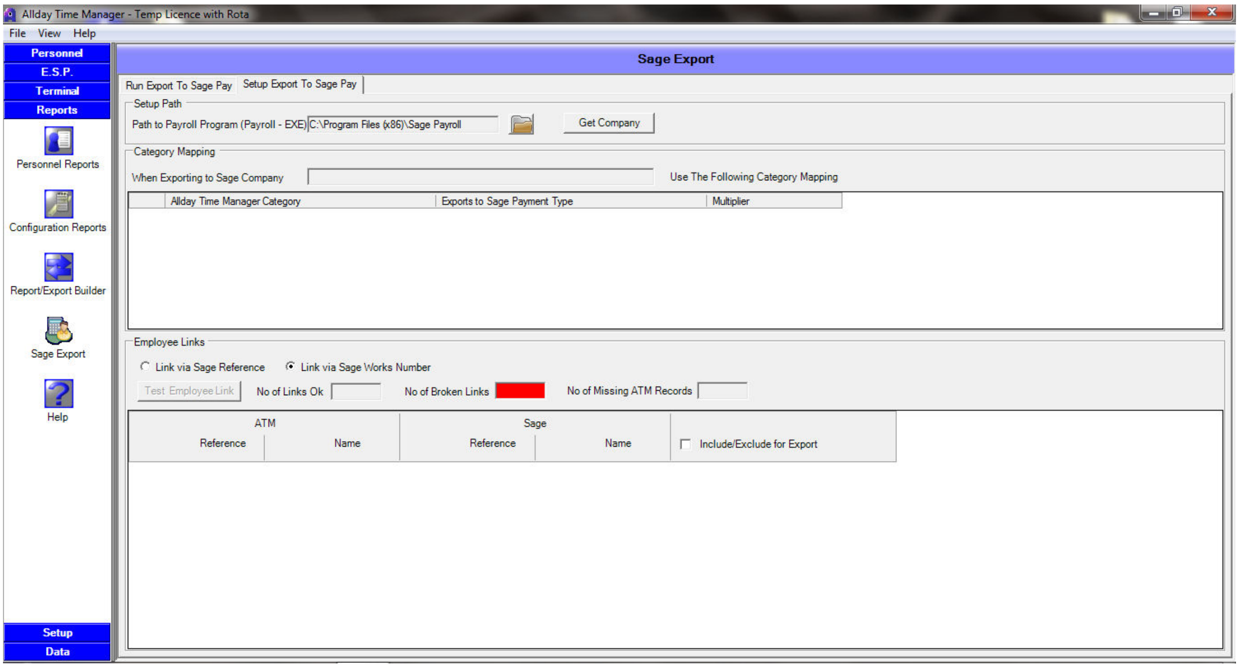
Sage Export

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.

Rota's

Using the Rota's feature within Allday Time Manager, you can set employee's to work Rota's for different duties. To set an employee to Work from the Rota's by default, go to the employee's record in the Personnel section and set them onto the "Working on Rota's".

Setting up a new Duty

Step 1 : Go the 'Setup' on the left-hand side of the screen and select "Rota's".

Step 2 : On the "View for Dutys" screen, click the "New Duty" button at the bottom of the screen.

Step 3 : In the White box on the left, type the name of the Duty (e.g. Bar Shift).

Step 4 : Select the  button and select a start date for the Duty Cycle, as well as the number of days in the cycle. For example, if you were starting a Cycle from today for a 7-day cycle, you would set today's date and put the number of days in Cycle to 7. You can also use the drop-down box at the top of the screen to Copy a cycle from another Duty.

Step 5 : Next to each "Date of Duty" you can set how many employee's are needed for each day by setting the "No of Duty's" field.

Step 6 : Then, set whether you would like to repeat the Cycle by selecting the "Pattern repeats when complete?" If you do then choose to repeat the cycle, you can always add an additional employee space for an individual day by selecting the "Additional one off Duty" button.

Step 7 : When you are happy with the Cycle, click the 'Ok' button.

Step 8 : Click the  button to choose a Schedule you would like to assign to the Duty (for setting up a Schedule, please see page 18).

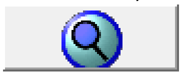
Step 9 : The duty you have now created will display boxes to represent each employee position that needs to be filled for each day. To add an employee to that spot, simply click the box and choose an employee from the "Find Personnel" wizard that appears, and click "OK". You can also remove an employee from a day by right-clicking and selecting "Delete".

Step 10 : You can also change the view from "Week" to "Month" using the option at the bottom of the screen, as well as move back and forth along the timeline using the arrows near the bottom of the screen.

Step 11 : If you would like to copy employees already assigned, select  then choose the date you would like to copy those employee's from and choose the number of days from this date to copy to. Then, select what date you would like to copy the staff into and click "Copy Staff" to confirm.

Step 12 : If you select the  button, you can also create a report as a PDF document, of the Duty or even multiple duties.

Viewing for Personnel

You can also view by Personnel. To do this, select the "View for Personnel" option at the top of the screen. You can then click the  button and select the employee's you would like to view. You can select multiple employee's by holding down the "Ctrl" key and even tick the "Select All" tick-box (next to the "OK" button) to select all the employee's.

When you have selected the employee's you would like to view, click "OK" and you should then see each employee's schedule of which Duties they have been assigned to for which dates. You can also amend which Duty an employee is assigned to by selecting the relevant window and choosing a different duty from the option box that pops up.

You can also remove an employee from a duty on a day by right-clicking on that day and selecting "Delete" (the same as from within the "View from Dutys" window.

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.