

# 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.

Log On			
•	User Name Password	USER	
	rassword	Remember Password	
		<u>o</u> k	<u>C</u> ancel

- **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

Add Employee Wiz	tard: Page 1/2								
Click on an underlined title for more information about what to enter.									
Help									
Please enter the E	mployee's initials.								
Start Date	08/02/2013 💌								
Surname									
Forename(s)									
<u>Initials</u>	Shortname								
Badge Number									
Payroll Number									
Job Title	<not selected=""></not>								
Section	<not selected=""></not>								
Default Shift	Init selected>       Init selected>       Init selected>								
Default Period	<not selected=""></not>								
	Cancel Next								

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

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.

Add Employee Wizard: Page 2/2	$\Leftrightarrow$							
Click on an underlined title for more information ab	out what to enter.							
Help								
Please enter the Employee's default Bank Holiday w	vorked rate.							
If bank holidays are booked using the Group Absen Employee also works on that day.	ce feature, this will determine the rate for that booking if the							
<u>Start Date</u> ,	te absences on a pro-rata basis 🔽							
Absences								
Permissions Holiday	Conflict Groups							
Cother								
Group Absences Deduction Category If Bank Holidays are to be booked, then for each Book 08:00 $\xrightarrow{-}$ hours at Basis If any time is worked on this day, alloc	bank holiday:							
	Back Cancel Finish							



# 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.

Search Criteria -		Results	1 employees
Enter values for a	at least one criteria.	Double Click the person to edit from the list, or highlight and click OK.	
Use Auto-Fill			
Surname		Smith, John (22)	
Payroll Number			
Badge Number			
Job Titles	Director Employee		
Select All			
Sections	Entire Company\Department 1\Section 1     Entire Company\Department 1\Section 2		
Select All			
Absence Conflict Groups			
Select All			

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.

🗿 Allday Time Mana	iger •						-	- 6 <b>-</b>
File View Help								
Personnel				P	ersonnel			
Edit Personnel	Rind Add Delete Save Revert Prin	) t						
3	Surname Smith	Forenames John	Initials	Shortname	Prev Next			
Add Personnel	General Extended Absences Clockings	1						
	Badge Number 987		Employment History					
	Payroll Number 987		Start Date 🔽 01/01/	2013 💌			Leaving Date	01/01/2013 💌
Clockings			Current Job Title Emp	loyee			✓ From	01/01/2013 •
	Email			re Company\Department 1	NSection 1		and a second	-
5	di la constante di	mage Not Set	Reports To					- O
Absence			Job Title History					
	Terminals Main Term	inal (PT 1400)	StartDate	Job Title	Location			Delete
5	Select All		• 01/01/2013	Employee	Entire Company/Department 1/Section 1			
Process Employees	PalmReader Settings							
Help	- end reads Jeanys							
	Shifts		19. <b>.</b>					
	Default Shift Working on Rota	is .				•		
							From 21/05/2013 *	
	Pending Shift Working on Rota					Ť	and the second se	
	Temporary Shift Working on Rota	's				Ψ	From 21/05/2013 To	21/05/2013 -
	Payment Periods							
	Default Period Weekly					*	Settings	
Terminal	Pending Period Weekly					-1-	From 27/05/2013 -	
Reports								In the second se
Setup	Temporary Period Weekly					¥	From 27/05/2013 * To	27/05/2013 💌
Data	1							

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.

🛕 Allday Time Manag	ger +							- 6
File View Help								
Personnel					Personnel			
Edit Personnel	Rind Add Delete Save Rever	Pint						
	Surname Smth	Forenames	John Init	als 🗌	Shortname	Prev Next		
Add Personnel	General Extended Absences Clo	:kings						
Clockings	Address			=				
2	Towm/City							
Absence	County Post Code							
	Date of Birth 21/05	/2013 👻						
8	Telephone No. 0	_						
Process Employees	Next of Kin							
Help -	Next of Kin No.  0				-			
Reports								
Setup					Reload			1
Data	·						 	



## **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.

Allday Time Mana	ger - Lite Edition		
File View Help			
Personnel		Personnel	
Edit Personnel	Rind Add Delete Save Revet Print		
	Surname Smth Forenames John	Initials Shortname Prev Next	
Add Personnel	General   Extended   Absences   Clockings		
Clockings	Absence Conflict Group	Year         2013         H           Year Starts         01         January         H         2013         to         [31] December 2013         H	
Absence	Add Allowance	Add Absence Edit Defets Show	
	Allowances	Absences	
Process Employees	Category Pre Booked Taken Remaining Holiday 0 0 20		
riccus cripicyeus	Sick 0 0 0		
Help	Other 0 0 0		
		Group Absences and Bank Holidays (deductable)	
	Deduction Category for Group Absences	Bank Holiday Rates	
Terminal	Holiday	Book 00:00 + hours at Basic r From 09:00 +	
Reports		If worked, book at OT	
Setup		I worker boards 14.	

## **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".

Add Absence Wizard: Page 1									
Choose the Absence Type									
<ul> <li>NORMAL - an Absence for an Individual for a date in the future.</li> </ul>									
C RETROSPECTIVE - an Absence for an Individual for a date in the past or today.									
C GROUP - a Group Absence for a Site/Department/Section.									
Cancel 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.

Add Absence Wizard: Page 2/2									
Click on an underlined title for more information about what to enter.									
-Help									
Please enter the Last date of the Absence.									
This is the date that the Absence finishes on.									
Type of Absence	Holiday								
First Date of Absence	11/04/2013 💌								
Last Date of Absence	17/04/2013 💌								
Include in this booking days that have no target hours									
Include									
🗆 Sat 🗖 Sun 🔽 Mon 🔽	Tue 🔽 Wed 🔽 Thur 🖾 Fri								
This booking will count as	5.00 + days.								
How the hours will be allocated									
<ul> <li>Allocate the hours as scheduled within the Employ</li> </ul>	ovee's shift setting.								
C Book 08:00 hours at <not selected=""></not>									
✓ Allocate hours as worked/paid time.									
Allocate nours as worked/paid time.									
Notes Going on Holiday									
Hotes Cong of Honday									
	Back Cancel Finish								



**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).

_									Some				
sonnel	Rind Add	Delete Save	Revert P	rint									
ł	Surnam	e Smith		Forenames John	<u>X</u>	Ini	tials	Shortname		Prev	Next		
sonnel	General Ext	ended Absence	S Clocking	js									
tings	Absence Conflict Group				Year	Year 2013 Starts 01 Jan		÷ 2013 tr	31 December 2013	* 			
7	Ð	0				•	0	$\overline{}$					
nce	Add Allowa	ince Edi	t i		Ad	Absence	Edit	Delete	Show				
	Allowance	s			Abs	ences							
2	Category	Pre Booked	Taken	Remaining		From	To	Category	Notes			Allocation	
nployees	Holiday	5	0	15		11/04/2013	12/04/2013	Holiday	Going on Holiday			As Scheduled	
	Sick	0	0	0		15/04/2013	17/04/2013	Holiday	Going on Holiday			As Scheduled	
	Other	0	0	0									
?													
lp													

**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.

Allday Time Mana	and the faith										
	ger - Lite Editio	in									
File View Help	1										
Personnel	Personnel										
Edit Personnel	Rind Add	Delete Sav	e Revert Pri	nt							
2	Surnam	e Smith		Forenames Joh	n	In	itials	Shortname	Prev	Next	
Add Personnel	General Ext	ended Absen	ices Clocking	5							
Clockings	Absence Conflict Group Year Starts 01 January - 2013 to 31 December 2013										
Absence	Add Allowa	ance E	idit		Ade	d Absence	<i>e</i> dit	Delete			
	Allowance	s			Abs	ences	-				
5	Category	Pre Booke	d Taken	Remaining		From	To	Category	Notes		Allocation
Process Employees	Holiday	5	0	15	•	11/04/2013	12/04/2013	Holiday	Going on Holiday		As Scheduled
	Sick	0	0	0		15/04/2013	17/04/2013	Holiday	Going on Holiday		As Scheduled
Help	Other	0	0	U							

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

🖳 Absence Calenda	r for Smith, John					
Single Four Pre	V Next Print C	ose				
Mon	Tue	Wed	Thu	Fri	Sat	Sun
1	2	3	4	5	6	7
8	9	10	11	12	13	14
			Ho	liday		
15	16 Holiday	17	18	19	20	21
	Holiday					
22	23	24	25	26	27	28
29	30	1	2	3	4	5
6	7	8	9	10	11	12



# **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".

Add Absence Wizard: Page 1	$\Leftrightarrow$
Choose the Absence Type	
C NORMAL - an Absence for an Individual for a date in the	future.
C RETROSPECTIVE - an Absence for an Individual for a da	te in the past or today.
GROUP - a Group Absence for a Site/Department/Section	1.
	Cancel Next

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

Add Absence Wizard: Page 2/3		$\Leftrightarrow$
Help Please select the Site / Departm	nore information about what to en nent / Section for this booking red from within the Dictionary Setu	
Site /Department / Section	Entire Company	
		Back Cancel Next



**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.

Click on an underlined title for	more information at	oout what to enter.
Help		
Please enter the Booking's De	scription.	
This is the description of the B	ooking	
Booking will be made for	Entire Company	
Description for this booking	Easter Monday	
Please select the type of gr	oup booking	1
C A Public or Bank holida	y.	
A Public or Bank Holida	ay with the day(s) pr	ocessed through their own shift settings.
C A group of People with t	the day(s) processe	d through their own shift settings.
C A group of People with t	the day(s) processe	d using the settings below.
Settings		
First Date of Absence		01/04/2013 💌
Last Date of Absence		10/04/2013 💌
Deduct this absence from	allowances	
Book this absence as		<not selected=""> rate</not>
Start the booking from		09:00 each day
Booking duration is		07:30 hours per day
	paid time	
Allocate hours as worked/		

**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 shutdown 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".

Schedule 1							
			Actu	ual			
Original		Edi				Add	•
Entry 08:00	Exit		Entry	Exit		Delete	
08:00	09:00	<u>+</u>	08:00	10:00		Edit	ڪ ه ک
						Reset	
		•			1.	Process	3
Absence	\$						
Add 6	Delete 🍙 🛛 E	dit 🍘	Group Absen	ce: None			
		dit 🥥	Group Absen	ce: None			
Rounded			Group Absen	ce: None			
Rounded From	То	dit 🍘 🛛	Group Absen	ce: None			
Rounded	To		Group Absen	ce: None			
Rounded From	To	Desc	Group Absend	ce: None			
Rounded From	To	Desc	Group Absend	ce: None			
Rounded From	To	Desc	Group Absen	ce: None			_
Rounded From	To	Desc	Group Absen	ce: None		_	
Rounded From	To	Desc	Group Absend	ce: None			_
Rounded From 08:00	To	Desc	Group Absend	ce: None			
Rounded From 08:00 Totals Desc	To 10:00	Desc	Group Absend	ce: None			
Rounded From 08:00 Totals Desc	To 10:00	Desc	Group Absen	ce: None			
Rounded From 08:00	To 10:00	Desc	Group Absend	ce: None			
Rounded From 08:00 Totals Desc	To 10:00	Desc	Group Absen	ce: None			
Rounded From 08:00 Totals Desc	To 10:00	Desc	Group Absen	ce: None			



Edit Period	$\Leftrightarrow$
C Book 09:00 - hours from 08:00 -	
Comments applied to Entry and Exit	
Advanced	
Entry	Exit
Originally 08:00	Originally 09:00
08:00	17:00 -
Comments	Comments
[ADMIN, 08/02/13 @ 12:09]	[ADMIN, 08/02/13 @ 12:09]
[ADMIN, 08/02/13 @ 11:43]	[ADMIN, 08/02/13 @ 11:43]
	-
1	
Override system determined allocation rate with     Basic	rate
	OK Cancel

**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.

	Persor	nnel Reports
Attendance 7 Absence	🁬 Totals 🏹 Rextime 🔕 Clocking History 🥩 Fire 🚦	Exceptions Employee Details
		Jance Report
REPORT TYPE	SORT BY	unce report.
Sense Verward (* 1846)	G December 19	
Full Period Details Report	Personnel Name     Payroll Number	
SEARCH CRITERIA		
consistered proceedings	26/05/2013 💌	
	any/Department 1/Section 1	
Entire Com	any/Department 1/Section 2	
	any/Department 2/Section 3 any/Department 2/Section 4	
	-	
Employees		
REPORT OPTIONS	*	
Display Clocking Notes	*	
Display Clocking Notes     Display Decimal Minutes		
Display Clocking Notes     Display Decimal Minutes     Display Exceptions		
Display Clocking Notes     Display Decimal Minutes	Absence	
Display Clocking Notes     Display Decimal Minutes     Display Exceptions     Unauthorise     Missed Clo	king Clocking	
Display Clocking Notes     Display Decimal Minutes     Display Exceptions     Missed Clo	sking Clocking Clocking	

**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.

Ł		Allday Time Manager Full Attendance Report								<b>21</b> 170			
Name Blogg	s, Joe		Sect. Alida Staff	y Time S	Systems\Sys	tems Wo	orkshop\All	Shift Weel	dy Main Shi	ſt			Payroll No 1001
Perio	od:- 28/06	6/2010 to 04	1/07/2010	Sigr	ned by <b>EM</b>	PLOYEE	-			MANAG	GER:-		
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 Thu	30/06 01/07	(M)00:00	17:00(M)							08:00 08:00	08:00 08:00	00:00 00:00	Holiday
Fri	02/07	09:00(M)	17:00(M)							08:00	08:00	00:00	
			· · ·					We	ekly Total	<u>040:00</u>	<u>039:45</u>	<u>-000:15</u>	
Note	3. <sup>*</sup> *					В	Balance fr Ac alance can	om previo cumulativ	e Balance	040:00	039:45	-000:15 000:00 000:00 <u>000:00</u>	
	gory Pay gory	<u>Totals</u>		Total 039:45	Pay Total 039:45	<u>Additi</u>	ons:-						
Daan	2			000.40	000.40								
<u>Abse</u>	nces for	this period											
Cates Holida			From 30/06/20	010		To 30/06/2	010		Days 1.00			Irs this pe 108:00	eriod
<u>Grou</u>	D Absend	ces for this	period										
<u>Exce</u>	ntions fo	r this perio	d (if select	ed)									
Date Mon	28/06/1	0	Time 09:15		escription ate Entry				Resolved <mark>X</mark>				

**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.

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Personnel Reports	
🐙 Mundana 🤭 Manara 🆓 Talah 🥂 Barbara 🧑 Gadina Maran 🦂 Em 📕 Ercentines 🕅 Embara Dalah	
Exceptions Report	
SEARCH CRITERIA	
From: 20/05/2013 To: 26/05/2013 T	
Section Entire Company/Department 1/Section 1 Entire Company/Department 1/Section 2 Entire Company/Department 2/Section 3 Entire Company/Department 2/Section 4	
*	
Employees	
•	
REPORT OPTIONS	
Display potential unauthorized Absences	
🔽 Display Exceptions	
Missed Break Whong terminal Schedule Conflict Transheet Conflict Early Exit	
	Generate 🧿
	Attendance       Absence       Image: Code of the company (Department 1) Section 1         From:       20/05/2013       To:       26/05/2013         Section       Enrifie Company (Department 1) Section 1       Enrifie Company (Department 1) Section 2         Enrifie Company (Department 1) Section 1       Enrifie Company (Department 1) Section 3         Enrifie Company (Department 1) Section 3       Enrifie Company (Department 1) Section 3         Enrifie Company (Department 1) Section 3       Enrifie Company (Department 2) Section 3         Enrifie Company (Department 1) Section 3       Enrifie Company (Department 2) Section 3         Enrifie Company (Department 2) Section 3       Enrifie Company (Department 2) Section 4         Employees       Image: Company (Department 2) Section 3         Enrifie Company (Department 2) Section 4       Image: Company (Department 2) Section 4         Employees       Image: Company (Department 2) Section 4       Image: Company (Department 2) Section 4         Employees       Image: Company (Department 2) Section 4       Image: Company (Department 2) Section 4         Image: Company (Department 2) Section 4       Image: Company (Department 2) Section 4       Image: Company (Department 2) Section 4         Image: Company (Department 2) Section 4       Image: Company (Department 2) Section 4       Image: Company (Department 2) Section 4         Image: Company (Department 2) Section 4



**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.

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.

Allday Time Manag	jer - Temp Licence with Rota								
File View Help									
Personnel	Sage Export								
E.S.P.									
Terminal	Run Export To Sage Pay Setup Export To Sage Pay								
Reports	Setup Path	7							
	Path to Payroll Program (Payroll - EXE) C-NProgram Files (x86)\Sage Payroll 📔 Get Company								
	Category Mapping								
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1000		4							
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		Ц							
		Ц							
Report/Export Builder		Ц							
Report Export Builder		Ц							
		Ш							
	Employee Links	-							
Sage Export	C Link via Sage Reference 🕜 Link via Sage Works Number								
?	Test Employee Links No of Links Ok No of Broken Links No of Missing ATM Records								
Help	ATM Sage	1							
	Reference Name Reference Name Include/Exclude for Export	Ц							
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- **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 source 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.