

# Time Manager Solution Overview

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## Introduction

People and their skills are an expensive and scarce resource. In order to be effective, they have to be carefully matched to the demands of the job and the materials available.

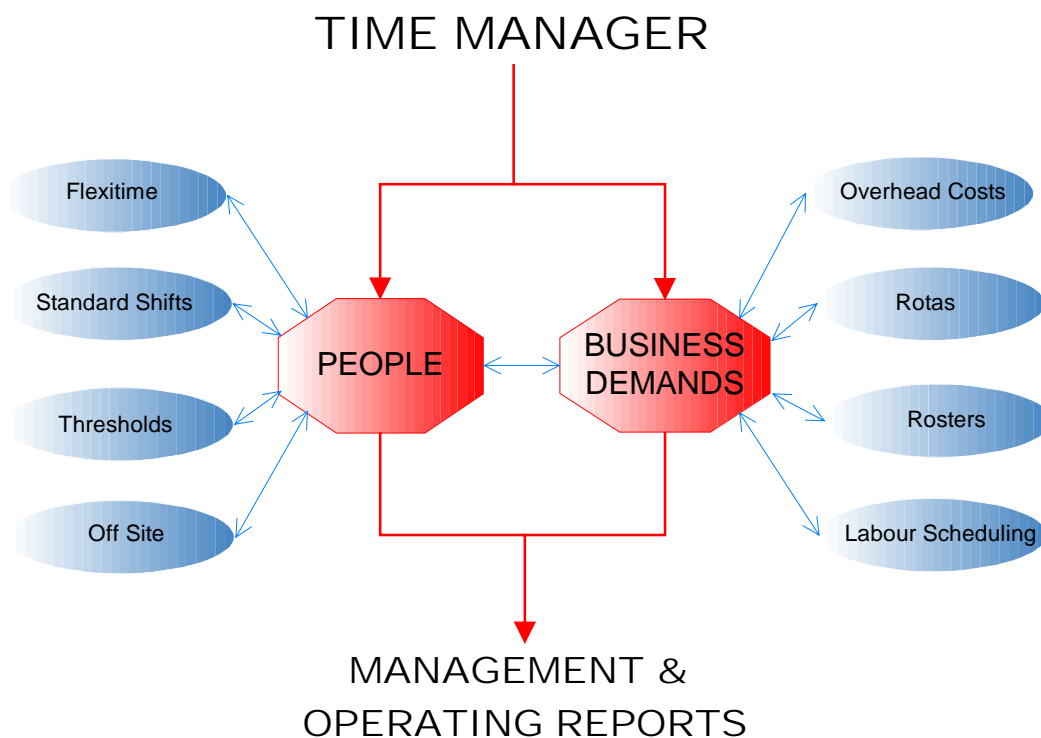
Time Manager is a Human Resource Management System and is one of a number of Datalinx modules that can be used free-standing or interfaced to other computer systems.

There are no practical constraints to the system, other than the speed and capacity of the hardware on which it is loaded. The software is available to run under a wide range of operating systems, including Windows operating systems, Unix and Linux

## Time Manager

Is a time recording and attendance system which outputs a wide range of management and operating reports, together with an output to payroll.

Facilities for Rotas, Rosters and Labour Scheduling are available as well as Flexitime, Standard Shifts, Thresholds etc.



## System Overview

Time Manager has a logical and straightforward structure utilising modern database techniques. The major files within the system are:

### Organisation

The company structure is defined within:

- Cost Centre
- Department

### Work Patterns

Define the following:

- Shift Rules and Definitions including Flexitime and Standard Shifts
- Off-site and Absence Codes
- Shift Rotas and Rosters

### Employees

Employee details include:

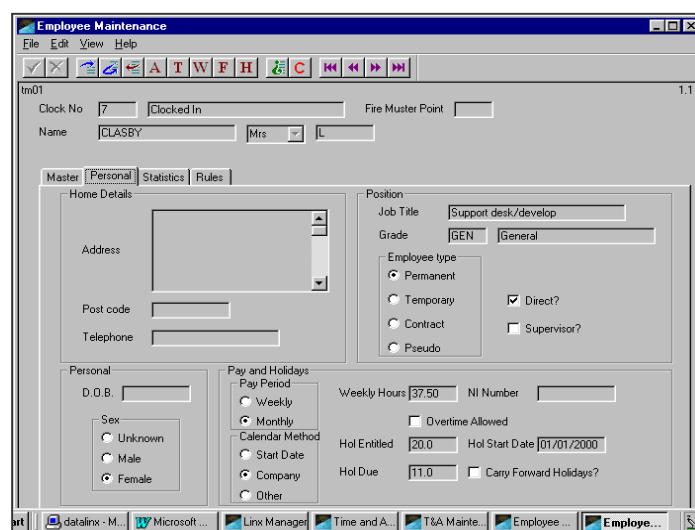
- Name and Address
- Date of Birth
- Clock Numbers/ID Card Numbers
- Start and Finish Dates
- Pointers to Shifts and Rotas
- Holiday Accrued and Taken

### Global Calendar

Company and Public Holidays.

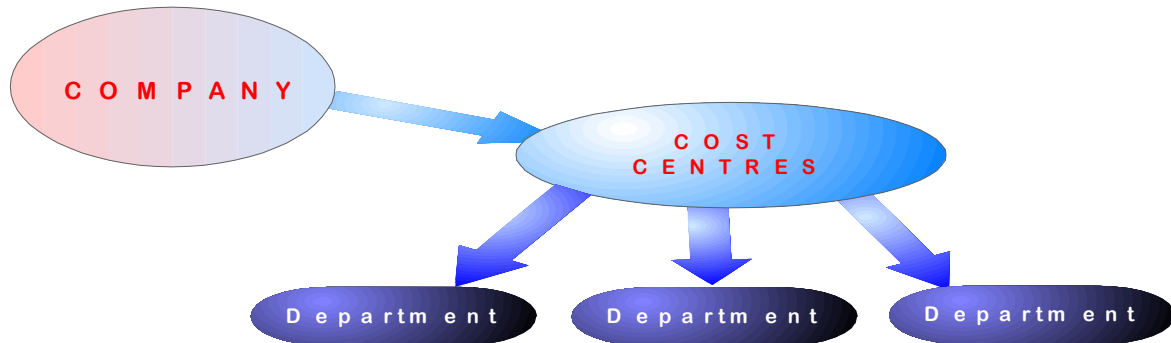
### Employee Calendars

Used for booking on to Shifts and Rotas and for individual planned absences.



## Company Structure and Organisation

Time Manager requires a minimum structure on which to sort information.



### Cost Centres

These represent the top level of the company structure - apart from the whole site. Cost Centres can either reflect real organisational structures such as Paint Shop, Packing, Assembly etc., or they can represent groupings that are created for analytical purposes, e.g. Staff, Production, Engineering Support.

### Departments

Departments are within Cost Centres and allow cost analysis both within and across Cost Centres.

If consistent Department codes are used within each Cost Centre, then analysis of those Departments across general Cost Centres is possible, e.g. calculating the total wages cost of providing secretarial support to all Cost Centres.

### Job Descriptions

Job Descriptions are usually specific to individuals, (such as Deputy Quality assurance Inspector).

## Work Patterns

### Shift Patterns

The system has facilities for an infinite number of shift patterns, which are logically grouped into shift frameworks.

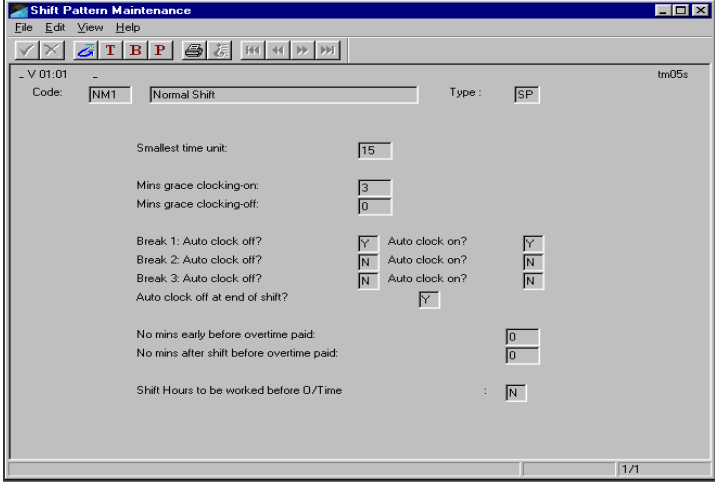
1. **Standard Shifts**  
Sometimes called Fixed Shifts, these are typically factory shifts with overtime bands, premiums, etc.
2. **Flexitime**  
Specified core hours of attendance. Permits staff to accrue hours, take flexi-days, plus carry credit hours over period ends.
3. **Thresholds**  
This provides hours to be worked within a predetermined time period, typically 37.5 hours per week. Once these hours have been worked, the overtime rules will apply to additional hours worked within that shift.
4. **Hours As Worked**  
This is used to record the number of hours a person is on site with the minimum of rules. Normally it is used to monitor contract and agency staff. It can also be used to record the movements of visitors. It does not output to payroll.

Using the above the factory could use Standard Shifts, whilst the offices were on Flexitime. There is no practical limit to the number or type of shifts a company can work.

The Shift is the key to focusing all the other parameters affecting work patterns. The Shift provides the framework and defines the rules by which these parameters are operated.

The following outlines the facilities within each of the Shift frameworks.

## Overview to Standard Shifts Framework



The shift patterns dictate how the attendance rules are applied to the clockings. For example an employee arriving late to work may be penalised. All those starting work earlier than the normal time may be paid at an overtime rate. Working after normal time may accrue overtime pay.

There are three breaks in the shift, i.e. tea, meal, tea. These may be set to auto clock on/off.

The following define the major fields in the Standard Shifts:-

### Smallest Time Unit

This sets the minimum payment period in minutes, (any value from 1-60 can be entered). If 15 minutes is entered, the employee will only be paid in 15-minute increments, and anything less (although recorded) will not generate payment.

### Minutes Grace Clocking On

This allows a period of time for the employee to clock in before he is deemed to be late. This grace period must be less than the smallest time unit. Grace time taken by an employee is reported as lost time.

### Minutes Grace Clocking Off

This is similar to "minutes grace clocking on" but allows a grace period before the end of shift to clock out without losing time.

### Breaks

Three breaks are available. The period of each is variable. If required, these can be set to auto clock. However, manual clockings will override auto clockings. A paid breaks facility is available to record employees leaving the company who, for Health and Safety reasons, need their movements tracked but are to be paid.

Overview to Standard Shifts Framework (continued)

Overtime Rules Flag

If set to no, there is no condition under which overtime is paid.

Number of Minutes Early Before Overtime Paid

This is the number of minutes before start of shift that an employee has to work before overtime is paid.

Number of Minutes After Shift End Before Overtime Paid

This is the number of minutes after the shift ends, that an employee has to work before overtime is paid.

Shift Times

This facility displays the start and finish times within the individual shift pattern.

Shift Premiums

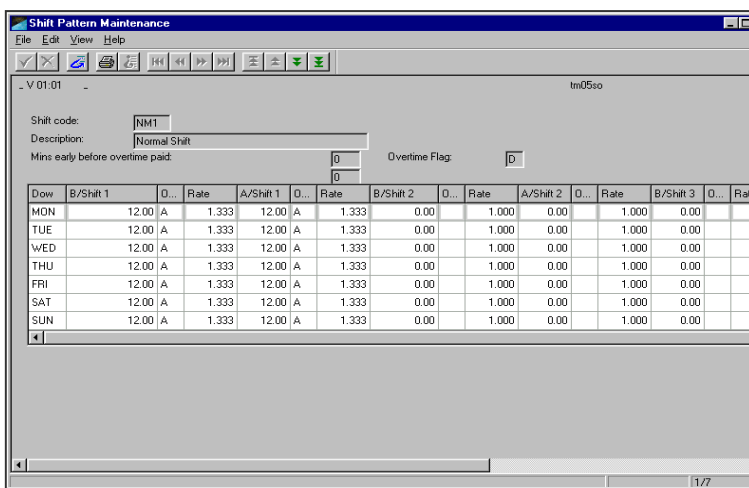
Shift premiums can be paid in three ways, either a lump sum added to the hourly rate, by a multiple of basic pay, or both.

Attendance Allowance

This can be a lump sum, or a multiple of the basic rate.

Overtime

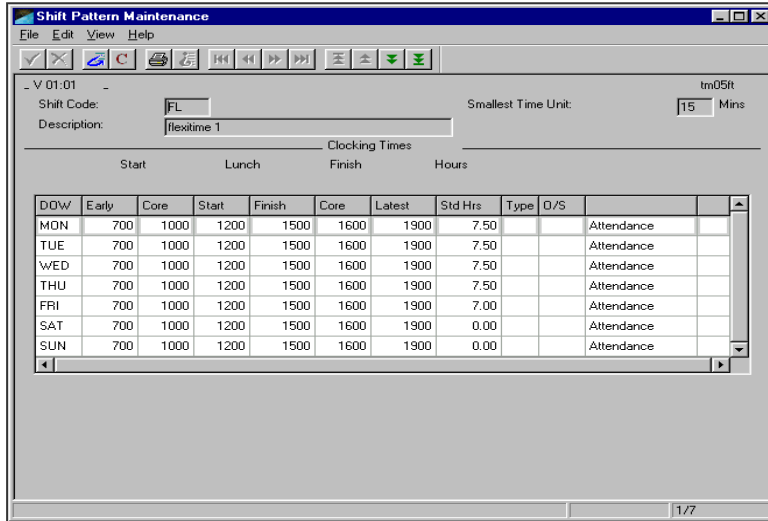
The system allows for eight different overtime rates and these can be any multiple greater than 1. These multiple rates can themselves be multiplied by any shift premium factors used when defining a shift.



The screenshot shows the 'Shift Pattern Maintenance' window. It includes a menu bar (File, Edit, View, Help), a toolbar with various icons, and a main area with the following fields: Shift code: NM1, Description: Normal Shift, Mins early before overtime paid: 0, and Overtime Flag: D. Below these fields is a table with columns for Day, B/Shift 1, O..., Rate, A/Shift 1, O..., Rate, B/Shift 2, O..., Rate, A/Shift 2, O..., Rate, B/Shift 3, O..., Rate. The table contains data for days MON through SUN.

Day	B/Shift 1	O...	Rate	A/Shift 1	O...	Rate	B/Shift 2	O...	Rate	A/Shift 2	O...	Rate	B/Shift 3	O...	Rate
MON	12.00	A	1.333	12.00	A	1.333	0.00	1.000	0.00	1.000	0.00	1.000	0.00		
TUE	12.00	A	1.333	12.00	A	1.333	0.00	1.000	0.00	1.000	0.00	1.000	0.00		
WED	12.00	A	1.333	12.00	A	1.333	0.00	1.000	0.00	1.000	0.00	1.000	0.00		
THU	12.00	A	1.333	12.00	A	1.333	0.00	1.000	0.00	1.000	0.00	1.000	0.00		
FRI	12.00	A	1.333	12.00	A	1.333	0.00	1.000	0.00	1.000	0.00	1.000	0.00		
SAT	12.00	A	1.333	12.00	A	1.333	0.00	1.000	0.00	1.000	0.00	1.000	0.00		
SUN	12.00	A	1.333	12.00	A	1.333	0.00	1.000	0.00	1.000	0.00	1.000	0.00		

## Overview to Flexitime Framework



DOW	Early	Core	Start	Finish	Core	Latest	Std Hrs	Type	O/S	Attendance
MON	700	1000	1200	1500	1600	1900	7.50			Attendance
TUE	700	1000	1200	1500	1600	1900	7.50			Attendance
WED	700	1000	1200	1500	1600	1900	7.50			Attendance
THU	700	1000	1200	1500	1600	1900	7.50			Attendance
FRI	700	1000	1200	1500	1600	1900	7.00			Attendance
SAT	700	1000	1200	1500	1600	1900	0.00			Attendance
SUN	700	1000	1200	1500	1600	1900	0.00			Attendance

There is only one break allowed per day, which may be set to clock on/off automatically by the system. The duration for the lunch break may be deducted automatically from the total hours if specified.

Facilities exist to credit or debit (expressed as negative hours) time into the following week, i.e. if an employee fails to meet the target of, say, 25 hours for a week by 4 hours, he may compensate these 4 hours in the following week. Conversely, if he works for 35 hours this week, he may carry the 10 hours forward into the next week. There is a limit set on the number of hours that can be debited/credited and this is user defined.

### Lunch Period

There are three methods of calculating the lunch period:

1. From actual In/Out clockings.
2. By automatically clocking employees in/out at specific times. These will be overridden by manual clockings.
3. By auto deducting a number of minutes per day.

### Shift Times

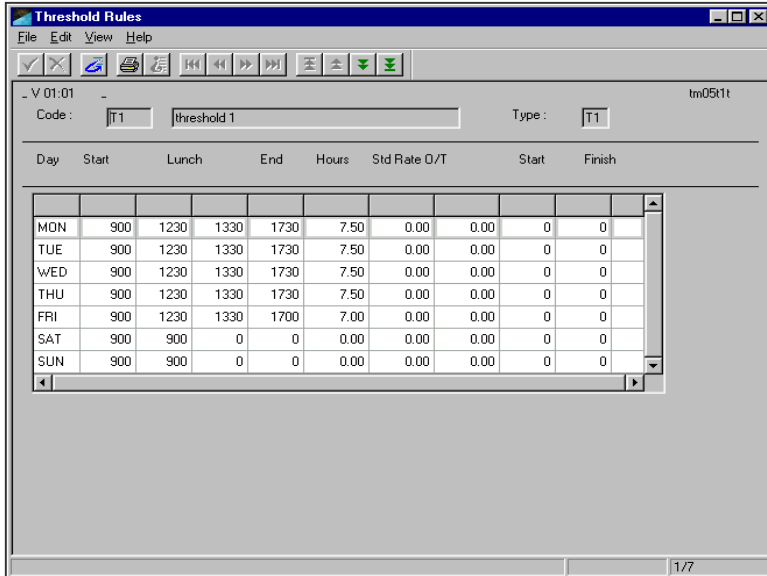
Early and Latest times are used to set the limits for daily start and finish. Core times are defined, together with the maximum number of hours that a person may accrue in a day.

### Contracted Hours

Contracted Hours, typically set to 0900 and 1700, are default times that the system refers to if no active clockings are available, i.e. an employee clocking 'off site' at 1500 would have hours credited to end of day at 1700.

## Overview to Threshold Shift Framework

Thresholds define the number of hours within a period, normally daily or weekly, that have to be worked before overtime rules apply.



The screenshot shows a window titled "Threshold Rules" with a menu bar (File, Edit, View, Help) and a toolbar. Below the toolbar, there are fields for "Code:" (T1), "threshold 1", and "Type:" (T1). A table below lists rules for each day of the week, including start, lunch, end, hours, and rates.

Day	Start	Lunch	End	Hours	Std Rate	O/T	Start	Finish
MON	900	1230	1330	1730	7.50	0.00	0	0
TUE	900	1230	1330	1730	7.50	0.00	0	0
WED	900	1230	1330	1730	7.50	0.00	0	0
THU	900	1230	1330	1730	7.50	0.00	0	0
FRI	900	1230	1330	1700	7.00	0.00	0	0
SAT	900	900	0	0	0.00	0.00	0	0
SUN	900	900	0	0	0.00	0.00	0	0

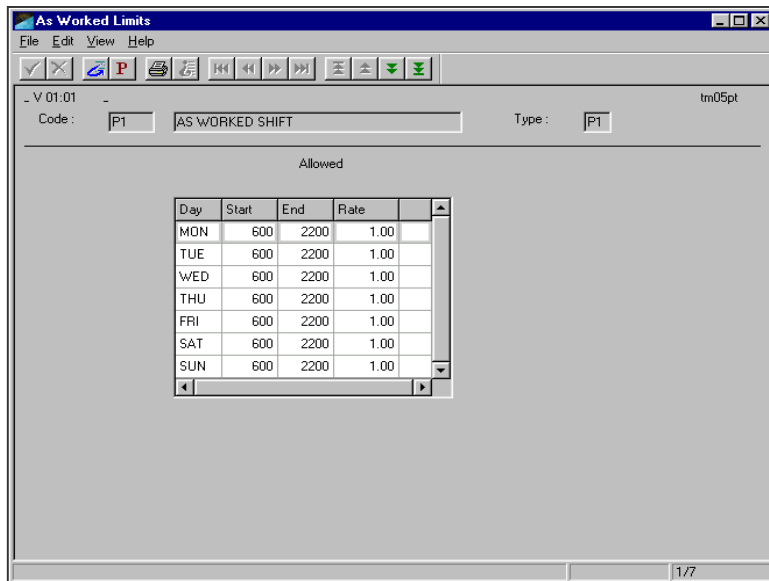
## Five-Day Rule

Within a five-day period a minimum number of hours have to be worked before overtime is paid. However, work on day 6 and day 7 is always at overtime rate.

## Seven-Day Rule

Irrespective of the actual days worked, the first xx hours are paid at basic rate and the next xx hours are paid at overtime rate 1. Up to a limit additional hours are paid at overtime rate 2.

## As Worked Framework



Employees categorised under this type of work pattern are governed by two rules only:

- A. Minimum time unit.
- B. The overtime flag.

Individuals are paid according to the number of hours worked within the start and finish times.

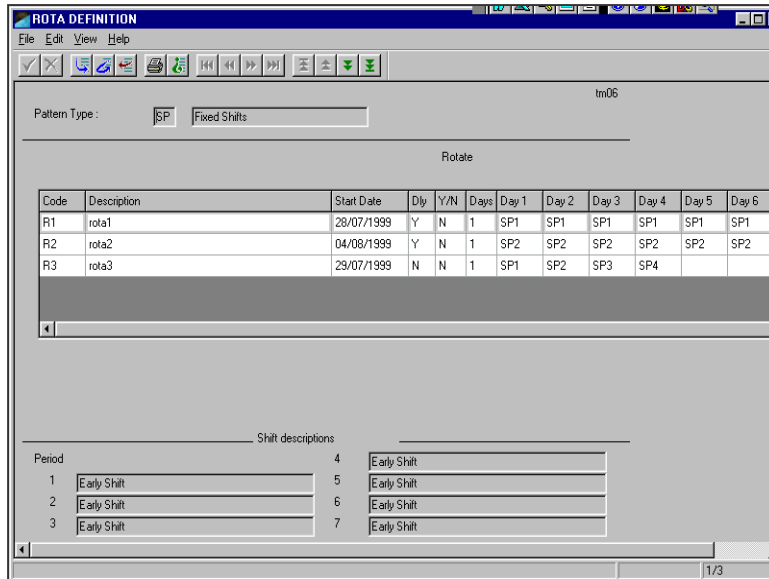
## Rotas and Rosters

The system has facilities to set-up Rotas and Rosters. A Rota is a perpetual cycle, whereas a Roster has a defined start and finish date.

Rotas may be set daily to rotate within a week, or weekly to rotate within a two to seven week cycle.

Facilities exist to create rotas within a master rota, used for continental shifts etc.

Rosters can be set for up to fifty-three periods, with each period being a day or a week.



The screenshot shows the 'ROTA DEFINITION' window with a menu bar (File, Edit, View, Help) and a toolbar. The 'Pattern Type' is set to 'Fixed Shifts'. The 'Rotate' section contains a table with the following data:

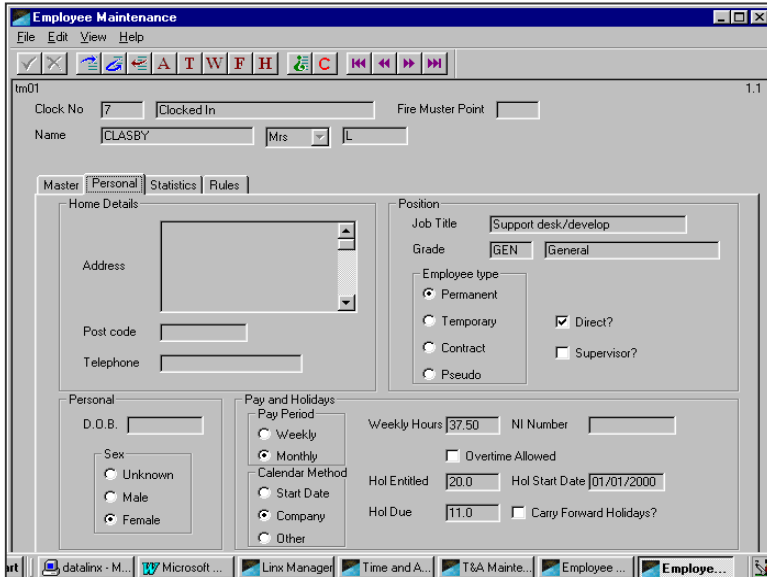
Code	Description	Start Date	Dly	Y/N	Days	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6
R1	rota1	28/07/1999	Y	N	1	SP1	SP1	SP1	SP1	SP1	SP1
R2	rota2	04/08/1999	Y	N	1	SP2	SP2	SP2	SP2	SP2	SP2
R3	rota3	29/07/1999	N	N	1	SP1	SP2	SP3	SP4		

Below the table, the 'Shift descriptions' section shows a list of periods with their corresponding shift names:

Period	Shift description
1	Early Shift
2	Early Shift
3	Early Shift
4	Early Shift
5	Early Shift
6	Early Shift
7	Early Shift

## Employees

The Employee File holds details for each person using the Time Manager system. The minimum data required is Clock Number and Name.



### Clock Number

This is the employee's clock number. This field accepts numbers only. If your system requires alpha numeric clock numbers of more than five figures, Time Manager can be adjusted. The clock number does not have to be the same as the badge number, allowing badge numbers to be changed if ID cards are lost.

### Title

The employee's title.

### Sex

M (male) or F (female).

### Type (PTCS)

The employee contract type. Four types exist:-

- P Permanent
- T Temporary
- C Contract
- S Pseudo or Visitor

### Supervisor

An authorisation level. To amend clockings, demand reports etc. (only available with certain manufacturers' data collection terminals).

### Address

The employee's normal home address.

### Telephone

The home or usual telephone number.

#### Date of Birth

Date format is numeric only with no alpha characters accepted. Illogical entries, such as a future DOB, are also rejected.

#### Starting Date

An employees start date: numeric only. A future date can be entered, but clockings prior to that date are invalid.

#### Leaving Date

The final day of employment. Any clockings after that date will not be valid. Future leaving dates can be entered.

#### Weekly/Monthly

Determines whether the employee is paid weekly or monthly and will affect the weekly and monthly update routines.

#### Direct/Indirect

Used to allocate an individual's time to production or overhead, it only has an effect when combined with the LINX Work-in-Progress and Job Costing modules.

#### Job Description

Job Descriptions are usually specific to individuals. This is a free format field.

#### Rota Code

Where individuals work a rota of shifts, then the appropriate code is entered. Where a Rota or Roster is activated by the calendar, the employee current Rota or Roster is displayed on this screen.

#### Current Shift

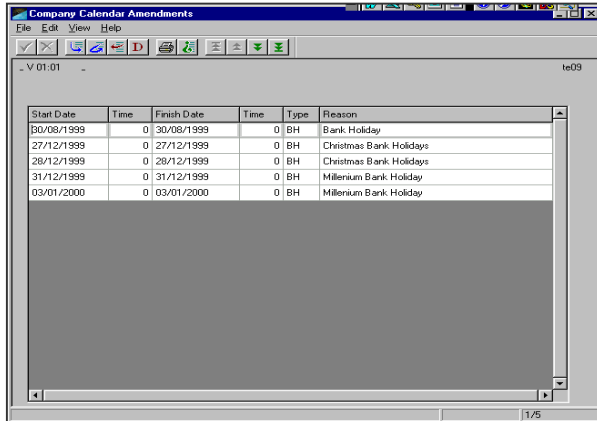
This is the current shift that the individual is booked to. It will be updated each day by the relevant Calendar, or current Rota, as appropriate.

## Calendars

Time Manager uses Calendars to bring to life the structure and work patterns created.

Two types of calendar exist:

### 1. Global Calendar



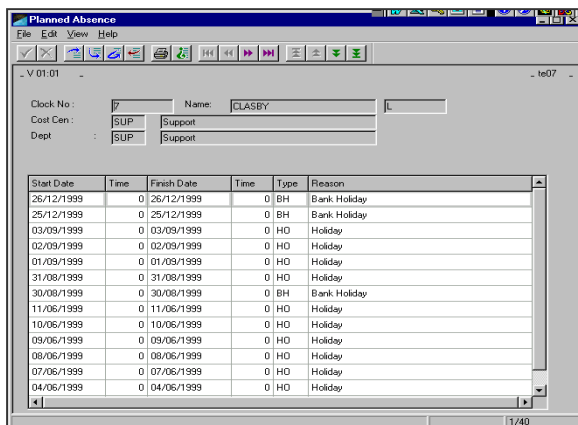
Start Date	Time	Finish Date	Time	Type	Reason
30/08/1999	0	30/08/1999	0	BH	Bank Holiday
27/12/1999	0	27/12/1999	0	BH	Christmas Bank Holidays
28/12/1999	0	28/12/1999	0	BH	Christmas Bank Holidays
31/12/1999	0	31/12/1999	0	BH	Millenium Bank Holiday
03/01/2000	0	03/01/2000	0	BH	Millenium Bank Holiday

This is the company's calendar and it describes events, which affect every employee - Bank Holidays, shutdown periods, etc. The Global Calendar provides the time framework within which all the work patterns and individual employees work.

Changes to the Global Calendar can be by company, cost centre or department, with individual exceptions.

### 2. Individual Calendar

This determines the calendar of the individual employee. Entries made override the Global Calendar. Daily shift changes can be entered here in advance.



Clock No: 17 Name: CLASBY  
 Cost Cen: SUP Support  
 Dept: SUP Support

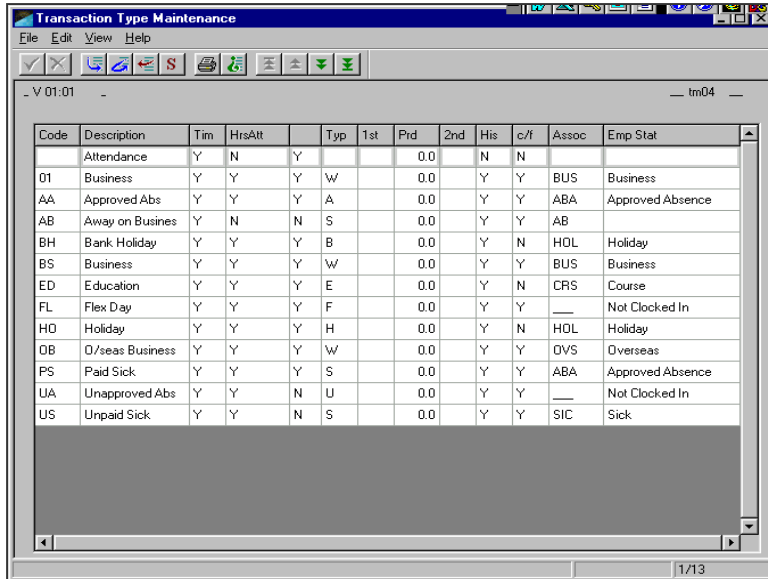
Start Date	Time	Finish Date	Time	Type	Reason
26/12/1999	0	26/12/1999	0	BH	Bank Holiday
25/12/1999	0	25/12/1999	0	BH	Bank Holiday
03/09/1999	0	03/09/1999	0	HO	Holiday
02/09/1999	0	02/09/1999	0	HO	Holiday
01/09/1999	0	01/09/1999	0	HO	Holiday
31/08/1999	0	31/08/1999	0	HO	Holiday
30/08/1999	0	30/08/1999	0	BH	Bank Holiday
11/06/1999	0	11/06/1999	0	HO	Holiday
10/06/1999	0	10/06/1999	0	HO	Holiday
09/06/1999	0	09/06/1999	0	HO	Holiday
08/06/1999	0	08/06/1999	0	HO	Holiday
07/06/1999	0	07/06/1999	0	HO	Holiday
04/06/1999	0	04/06/1999	0	HO	Holiday

### Manual Adjustments

All manual adjustments, bookings and updates are entered through two ENTRY and PROCESSING screens.

### Attendance Clocking

This allows amendments and updates to an individual's clockings for the CURRENT CLOCKING DAY only. Examples of such adjustments might be changing ABSENCE, (generated by a failure to clock in) to SICKNESS (following explanation of the absence).



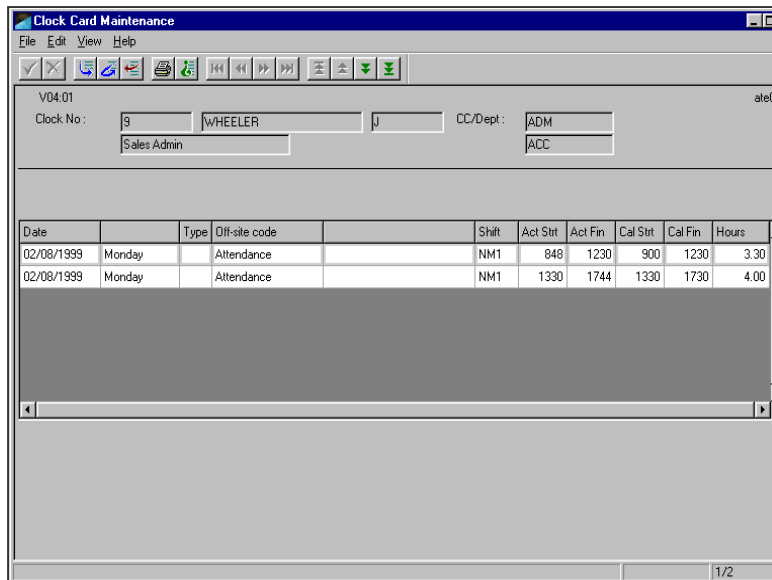
The screenshot shows a window titled "Transaction Type Maintenance" with a menu bar (File, Edit, View, Help) and a toolbar. The main area contains a table with the following data:

Code	Description	Tim	HrsAtt	Typ	1st	Prd	2nd	His	c/f	Assoc	Emp Stat
	Attendance	Y	N	Y		0.0		N	N		
01	Business	Y	Y	Y	W	0.0		Y	Y	BUS	Business
AA	Approved Abs	Y	Y	Y	A	0.0		Y	Y	ABA	Approved Absence
AB	Away on Business	Y	N	N	S	0.0		Y	Y	AB	
BH	Bank Holiday	Y	Y	Y	B	0.0		Y	N	HOL	Holiday
BS	Business	Y	Y	Y	W	0.0		Y	Y	BUS	Business
ED	Education	Y	Y	Y	E	0.0		Y	N	CRS	Course
FL	Flex Day	Y	Y	Y	F	0.0		Y	Y		Not Clocking In
HO	Holiday	Y	Y	Y	H	0.0		Y	N	HOL	Holiday
OB	O/seas Business	Y	Y	Y	W	0.0		Y	Y	OVS	Overseas
PS	Paid Sick	Y	Y	Y	S	0.0		Y	Y	ABA	Approved Absence
UA	Unapproved Abs	Y	Y	N	U	0.0		Y	Y		Not Clocking In
US	Unpaid Sick	Y	Y	N	S	0.0		Y	Y	SIC	Sick

## Clock Card Maintenance

This program shows:

- A. The exact clocking details of each employee
- B. The adjusted clocking, i.e. 0850 adjusted to 0900, and calculated total hours per day
- C. The distribution of total hours to basic and overtime
- D. Holiday and sickness hours



Date		Type	Off-site code	Shift	Act Stt	Act Fin	Cal Stt	Cal Fin	Hours
02/08/1999	Monday	Attendance		NM1	848	1230	900	1230	3.30
02/08/1999	Monday	Attendance		NM1	1330	1744	1330	1730	4.00

## Reports

LINX Time Manager can produce two groups of reports; those meeting the needs of Administration Staff (such as Payroll and Wages Officers) and those specifically for Line Managers.

On-line reports are produced on demand by users of the system. They can be sub-divided into Menu Generated and Command Generated.

### Menu Generated

These reports are produced by accessing the Reports menu. Many different reports are available, generally sorted by employee, cost centre and department.

### Command Generated (OUTPUT)

These reports are essentially hard copies of screens and are used to retain the results of an on-line search.

All reports (both on-line and system) can either be printed directly to the selected printer, displayed on screen or saved to a file. If written to a file, a report can then be accessed through the Stored Reports Screen - where they can be viewed on screen, printed or removed.

Users may produce their own reports by use of an optional ODBC interface enabling linking to third party report writers which include the Microsoft® suite of software.

## Hardware and Data Collection

A wide range of Data Collection Devices are available, from fixed terminals to hand-held devices.



Options are available to interface to repeater clocks, factory bells/alarms or security access locks if required.

# PINNACLE

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