# TIMEPro

# TimePro Compact
## Time Control From

# MIM
## SYSTEMS

**MIM Systems Ltd**

# TimePro Compact from MIM Systems

# Using TimePro Compact

The first section of this manual deals with the day-to-day use of TimePro Compact. If you want to know about setting up and configuring TimePro Compact, see the section of this manual entitled 'Configuration of TimePro Compact ' on page 23.

## *What is TimePro Compact?*

TimePro Compact is developed from the TimePro Professional System and has been designed to provide a cost effective solution for the smaller workshop. To keep costs down, it does not have all of the features of the full TimePro system, but many of these features can be added by upgrading if required. See page 31

The TimePro Compact system consists of a Portable data collection terminal and software that processes and analyses employees' clockings made at the terminal. Employees use the terminal to clock in and out of work and can also clock on and off jobs. When used for clocking on and off jobs, the TimePro Compact system also records what type of work has been done. This is achieved by entering a two digit 'Sale Code' when the employee clocks onto a job. If an employee who clocks on jobs does not have a job, the system will record this non-productive time by using 'special' job numbers. The TimePro Compact system will also record if an employee does not clock onto a job or a non-productive activity.

The clocking data is stored in the terminal until it is downloaded into the computer that is running the TimePro Compact software. The data can then be checked for incorrect clockings and various reports produced. These reports include attendance, payroll information, holidays, absence, job efficiency, profitability and lost or non-productive time.

To allow a comparison between time worked on jobs and the time actually sold, you need to tell TimePro Compact the allowed or sold hours. The standard version allows this information to be entered on an employee per day basis. You can also upgrade the software to allow analysis on a job-by-job basis. (See 'Inputting Sold / Allowed Hours' on page 11)

Using TimePro Compact divides into these areas

1. Communicating with the Data terminal, see page 4
2. Booking Holidays and Absence, see page 5
3. Checking / editing the Time and Attendance Data, see page 7
4. Entering the Sold / Allowed time, see page 11
5. Printing the required reports, see page 13

This manual deals with the use of the TimePro Compact software; please see the **TimePro Compact Setup Guide** for details on using the Data Terminals.

## *Communicating with the Data Terminal(s)*

Ensure the TimePro terminal is switched on and in 'Data Mode', place the terminal in the cradle and, if applicable, ensure the switch box is set correctly.

Click the clock button on the top toolbar to open the clock screen. Click the 'Run Clock Operation' button on the toolbar, you will then see a screen which gives you the option to Download the data only or download the data and programme the terminal with the employee

names etc. Click OK, TimePro Compact will then start downloading the data from the terminal, wait until this operation has finished and the progress bar has closed.  If TimePro Compact does not communicate with the terminal, ensure that you have set the terminal to 'Data Mode', that it is in the cradle properly and that the switch box (if fitted) is set correctly.

## *Booking Holidays and Absence*

Holidays and absence can be booked into the programme at any time.

Click the 'Holiday / Absence' button on the top toolbar.

This screen has three 'tabs'

## Book

This is where you book any absences; use the dropdown boxes to filter the companies, groups and employees you wish to book absence for. To book individual employees, uncheck the '**All employees**' box and click the check box next to the employee(s) that you are dealing with.

Choose the type of absence form the '**Type of Absence**' dropdown box. The 'Paid' and 'Rate' values will default to the values that you have set up for this absence. You can override these if you wish. If the 'Paid' box is checked the employee will be paid at the rate shown in the 'Rate' field.

In the **Hours** section you have the following options:
* *Use Day Rules*, this will use the number of hours allocated in the Day Rule.

* *Use Overtime Rules*, this will use the number of hours allocated in the Day Rule but will use the overtime rules for payment. For example, if the Day Rules absence hours are eight with the first seven hours paid at rate 2 and the remaining hours paid at rate 2 and you check the 'Use Overtime Rules', seven hours will be paid at rate 1 and one hour at rate 2. You can use this facility to pay two different rates of pay for absence even if the employee normally is paid overtime on a weekly basis.

* *Specify,* use this option to pay a specified time in hours and minutes. The first time will be paid at the rate shown in the 'Rate' box at the top of the screen, the second time will be paid at the rate specified in the 'Rate' box to the right of the second time field.

Check the '**Reduce Holidays**' box if you want the absence to be deducted from the employees' holiday entitlement. Check the '**Half Day**' box to reduce the holidays by half a day.

Check the '**Do NOT include in Overtime calculations**' box if you do not want the paid absence to count towards any overtime, for example, an employee must work 40 hours before he moves to an overtime rate. If you wish the paid absence to be included in the 40 hours, leave the box UNCHECKED, however, if you wish the employee to work 40 hours in addition to the paid absence then CHECK this box. (The same principle applies to employees on Daily Overtime)

Choose the date range that you are booking the absence for by using the '**From**' and '**To**' date boxes (clicking the arrow at the side of the box will show a dropdown calendar)

Finally, if the date range includes weekends *and you wish to book those days* check the '**Include Weekends**' box.

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To confirm the absences, click the '**Book**' button on the lower toolbar.

If try to book more than one absence for the same employee on the same day, you will be given a warning with an option to book the additional absence or cancel. If more than one absence is booked, the 'Multi Absence' field will be set to 'Y' (see Edit Tab)

## Edit

Once absences have been booked, they can be viewed and edited here.
The default view is all absences after the current date, to see earlier dates, click on the dropdown calendar and choose the required date. Alternatively, check the '**Show All Absences**' box to see all records.
The records can be sorted in date or employee order by clicking on the date or employee column header, clicking the header again will sort in descending order.

You can change the time paid, the rate of pay, and whether holiday entitlement is reduced or not. Just type in the new values, to change the reason for the absence click on the row you wish to change in the '**Reason**' column. A dropdown box will appear from which you can choose a new reason.

To delete a booked absence, click in the row you wish to delete and click the '**Delete**' button on the lower toolbar. To delete multiple records, hold the Control (Ctrl) key down and click on each record on the box at the left hand end of the row, each row will be highlighted as you select it. Click the 'Delete' button.

The '**Multi Absence**' column indicates if you have booked more than one type of absence for an employee on the same day. (The last absence booked will be shown in the reason column)

## Absence Codes

To 'Add' a new type of absence, click the 'New' absence button on the lower toolbar and type in a description. If you wish to pay an employee for this absence, change the paid column to a 'Y', in the rate column, enter the rate at which it will be paid.

To 'Delete' an absence, click on the row you wish to delete and click the 'Delete' button on the lower toolbar. TimePro Compact will not allow you to delete an absence if it is already in use.

## Making Ad-hoc Payments

You can use the Holidays and Absence screen to make ad-hoc payments that are not catered for by normal clocking etc. For example, you wish to pay employees an extra payment equivalent to one hours work at rate 2 if they work at night.

- Create a new absence code called 'Night Shift Premium'
- Set the rate as 2
- When an employee works at night, simply book an 'absence' of Night Shift Premium and use the specify option, enter 1 hour as the time to pay.

## *Checking / Editing the Time and Attendance Data*

As the data is downloaded into TimePro Compact, the clockings are processed against employees shift patterns etc. if every employee clocks in and out correctly, no further action will be required. However, in the real world, people forget to clock in or out (or even both!) so it is necessary to check that no errors exist.

Click the 'Time and Attendance' button on the top toolbar.

The Time and Attendance' screen is empty when first shown, click the 'Refresh' button on the lower toolbar to bring the latest data onto the screen. If you wish to see data for previous weeks, click the 'Week Ending' dropdown box at the top of the screen and choose the desired week.

At the top of the screen are dropdown boxes that will allow you to filter the employees by company and groups. You can also see records for only current employees (the default) or all employees including those that are on hold (see 'Employee Tab' on page 15)

## Screen Layout

The top half of the screen shows the attendance clockings for the first employee.
There are four 'Tabs' that give different views:

1. Edit
   This is the only view where the clockings can be edited, deleted of added. Also on this screen is a column entitled 'Status', this shows if any errors such as uneven clockings have been found.

2. Rounded
   This shows how the actual clockings have been rounded in accordance with the Day Rules.

3. Actual
   These are the actual clockings as entered at the clock.

4. Combined
   This view shows both the edited and rounded values for each clocking.

The lower half of the screen shows the calculated hours to be paid at the various rates of overtime for each day. Also shown is the gross pay for each day as well as total hours and gross pay. There are two further columns on the lower grid:

1. Brought Forward (B/Fwd)

If weekly overtime is in use, any time that is carried over for work done after the week 'ends' time will be shown here.

2. Cash Adjust (£/Adj)
   If you wish to make a one off cash payment to an employee you can enter the amount here. To note the reason for the cash adjustment, click the appropriate button (for the day you are dealing with) to the right of the lower grid. This will display an input box.

## Editing Data

To **edit** a clocking, ensure that the 'Edit' tab is clicked, click on the clocking you wish to edit and type in the new value. Press enter to save the new value. If you press the escape key whilst editing the clocking, the original value will be restored.

To **add** a new clocking, click on an empty cell anywhere in the row and type in the new clocking value. Press enter to save the clocking. Do not worry if the clockings are not in order, TimePro Compact will sort them when it calculates.

To **delete** a clocking, click on the cell you wish to delete and press the Delete key on the keyboard, press enter.

You can add and delete clockings from any point in the rows, you do not have to shuffle clockings to put them in the correct order; TimePro Compact will do this for you when it calculates.

NOTE: Midnight Clockings. Midnight (00:00) is the first minute of the day. If an employee has forgotten to clock off on a shift that ends at midnight, the clocking should be inserted on the day *after* that shift was started.

On a daily basis, look at each employee's clockings (ignoring the current day) and make any adjustments as required. (Move from employee to employee by clicking the 'Next' button on the lower toolbar) You can book absences for individual employee by clicking on the 'Status' column for the day you are booking the absence for. Right Click and choose 'Book Absence' this will show the absence screen for the person and date you are dealing with. Select the reason and dates for the absence and click' Book' button on the lower toolbar of the absence screen. When you return to the attendance screen, you will see the absence is now shown in the Status column.

When you have finished editing, click the '**Calculate**' button on the lower toolbar.

The hours paid at rate 1,2, 3 etc are determined by the Day and/or overtime rules see page 24 this will cover most situations. The Standard software can be upgraded to allow manual override of the calculated rates. See page 31

## Other Toolbar Buttons

Use the **First, Previous, Next** and **Last** buttons on the lower toolbar to move from employee to employee.

Use the **Previous Week** and **Next Week** buttons to move from week to week. (Holding the Shift key down as you move from week to week will stay with the same employee)

The '**Refresh**' Button shows the latest values, including changes made by other users on a network system.

The '**Calculate**' button will calculate the data to reflect any changes that are required if you have edited any data. You can see if this is required by looking at the status bar of the main screen, which will show the words 'Calculate Required'. There is also a 'Calculate' button on the top toolbar that carries out the same function. TimePro Compact will automatically calculate if it is required when you move to another week or close the Time and Attendance screen.

Clicking the '**Next Discrepancy**' button will take you to the first record that TimePro Compact can find with an error. Click this button again to move to the next discrepancy and so on.

The '**Add New Records**' is used to create blank daily records. Normally TimePro Compact creates a record for each employee for the appropriate dates as data is received form the clocks. Should a clock be out of action it is possible to create new records so that you can enter clockings manually. Select the date range required form the dialog box and click 'OK'

'**Recalculate**' as TimePro Compact processes the clockings; the current values for rates of pay, Day Rules, job sale and cost values etc are applied. If you change any of these values and wish to apply them retrospectively, you will need to recalculate. Select the employees affected and the date ranges required and click 'OK'

'**Book Absence**' if you are in the Edit Tab, click on the row in the Status column for the record you are working with. Click the 'Book Absence' button, the Holiday and Leave screen will be shown with employee and date you are working with. Choose the required absence and click 'Book'. When you return to the Time and Attendance screen it will refresh to show the booked absence.

NOTE: Right clicking the mouse can access many of the above toolbar functions.

## *Checking / Editing the Job Costing Data*

*Before editing any of the job costing data you should ensure that you have checked and corrected the Time and Attendance clockings first as job clockings will not be processed until the relevant Time and Attendance data is correct.*

Click the 'Job Clockings' button on the top toolbar. 

### Screen Layout

At the top left of the screen are dropdown boxes that allow you to filter jobs to companies and employees. In most cases you would leave these set to 'All'.

The next two dropdown boxes allow you to filter the job clockings that you will work with. The default is a single Job Number, with the job status as 'All'. Other options are 'All Jobs' and 'By Date' when you choose the later, the date field boxes are enabled and you can select the 'From' and 'To' dates. (NOTE: the records are not filtered until the 'To' date is set).

Using the 'Productive Status' dropdown you can filter jobs further. This gives the following options:

1. All
   Shows all Job Clockings.

2. Productive
   Shows only Job clockings that are for actual Jobs.

3. Non-Productive

Shows Job clockings on Non-Productive jobs, these have the special numbers from 2000 to 2050.

4. Missed
Shows Job clockings that have been created by TimePro Compact because the employee did not clock onto a job within the specified period from his start time. These clockings have the special number of 1997. (See 'Default Job' in the 'Employees' Section on page 16) Any 'Missed' clockings should be changed to an appropriate Job or Non-Productive number.

Below this section is a record grid. Each row of the grid shows a Job Clocking. The full detail of the clocking is shown in the lower half of the screen, therefore as you move from row to row, the boxes in the lower half will show the detail for the current record.

## Editing Data

To see clockings for a single job, select 'Job Number' from the 'Job' dropdown and select 'All' from the 'Productive Status' dropdown. Type the Job Number in the Job Number box and press the enter key.
The grid will show all clockings for that Job Number. You can edit any of the values that are blue in the edit boxes, which are:

1. Job Number

   This can be changed to a valid Job Number or a Non-Productive number. Clicking the ![button] button next to the Job Number box will give you a list of non-productive codes.
   If you change from a Non-Productive code to a Job Number, the sale code will be changed to 5 and the sold / allowed time set to zero. If you change from a Non-Productive code to a Job Number you will be prompted to change the sale code and the time allowed will be changed to time taken.

2. Clock On Time
   It is only possible to adjust the ON time of a job, this is because TimePro Compact will automatically adjust the OFF time for you. If you alter the ON time of a job the previous job OFF time will be adjusted accordingly (when TimePro Compact calculates).

3. Sold or allowed time (Only applies where Sold Time is entered on a per job basis)
   You can change the sold time for an individual clocking but TimePro Compact will do this for you automatically when you enter 'Sold Hours'. (See the paragraph entitled 'Inputting Sold / Allowed Hours' later in this section)

4. Sale Code

   This can be set to a valid Sale Code, click the ![button] button to get a list of available codes.
   You cannot set a non-productive clocking to anything other than 5.

## Inserting a Job Clocking

If an employee forgets to clock onto a job or non-productive activity, this can be done via the TimePro Compact software. Click the 'Insert Clocking' button on the lower toolbar. Fill in the appropriate fields. You only need to know the start time; TimePro Compact will work out the finish time and adjust the other clockings accordingly.

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## Deleting a Job Clocking

It is not possible to delete a job clocking. The clocking should be corrected to the appropriate job number or sale type. Alternatively, you can set the clock ON time to the same as the OFF time.

## Inputting Sold / Allowed Hours

The standard version of TimePro Compact allows the inputting of sold hours on an employee per day basis. This provides sufficient analysis for most peoples needs but if you want more in depth analysis such as hours sold versus taken by Sale type, then the software can be upgraded see page 31

### Per Employee Per Day Basis (Standard)

To use this option you will need to collate the total hours sold by each employee on each working day. You will need to collate the hours invoiced, by technician, on a daily basis. It is not necessary to match the invoiced hours to the dates the jobs were worked on, you are just comparing the difference between hours worked on any given day to hours invoiced for jobs that technician has worked on. Use the Hours per Day input sheet to collate these figures.

To input the hours, click the ⏱ button on the top toolbar. This will open up the Hours Input screen. Productive employees are listed in date order. By default, the last 30 days are shown. If you want to see all dates, click the 'All Dates' option.
Enter the sold time against each employee. Click the 'Close' key when finished.

### Per Job Basis (Upgrade Option)

To use this option you will need to collate the hours sold per job by employee and sale type. Choose 'Job Number' form the 'Job' dropdown box. Choose 'All' from the 'Productive Status' dropdown box.
Enter the job number you are dealing with in the 'Job Number' box and press the enter key. All the clockings for the job will be shown in the grid.

Click the ⏱ button on the lower toolbar of the Job Clockings screen. This will show the 'Update Sold Hours' screen. (From build 3.0.203, holding the Shift key down & pressing the enter key will also show the Sold Hours screen)
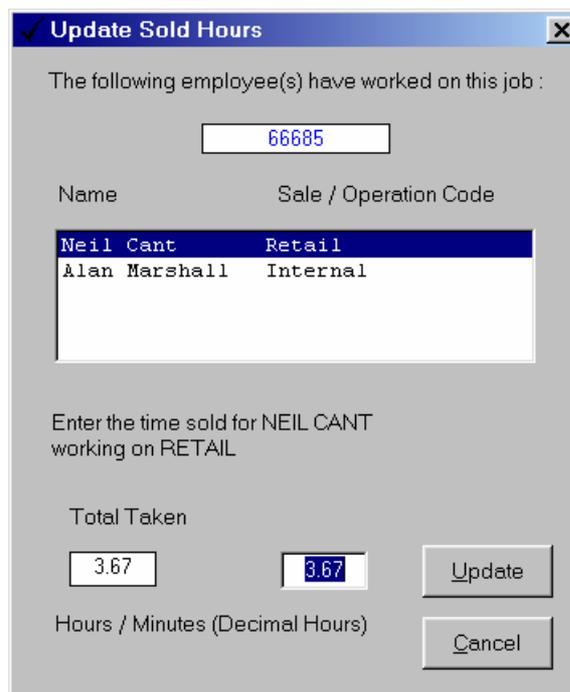
The employees, who have worked on the job, are listed by the type of work done. As you click on each employee, the total time taken by that employee is shown. Enter the time sold by that employee and press enter. This will jump to the next employee. When all employees have been done, press enter or click the 'Update' button. TimePro Compact will look through all the employees' clockings, by sale type, and make any adjustment on the final clocking. If you have the 'Prompt to Close' option set (see next section 'Closing Jobs') then you will be asked if you wish to close the job at this stage.

## Closing Jobs (Hours per Job Basis, Upgrade Option)

A job should be 'closed' in TimePro Compact when all work has been completed on the job. TimePro Compact uses the open/closed status to determine the **Work in Progress** figures. As mentioned in the section above, 'Per Job Basis', you can close a job after updating sold hours. You can also Close / Reopen a job at any time by clicking the  button on the toolbar.

To Close/Reopen several jobs at once, click the , you can select multiple jobs by holding the shift or control keys down and clicking on the job numbers you wish to close. To sort the jobs by date order, click the 'Order by Date' option. To see closed jobs, click the 'Show Open Jobs' check box (This option is not available on the Pre Time version of TimePro Compact.)

## Auto Close Jobs (Standard Version, Hours per Day)

If you are inputting sold hours on the Employee per Day basis, you can set TimePro Compact to automatically close jobs over a certain age. This is done during a clock download. If you use this method you should realise that the Work in Progress figure is not accurate, the facility is provided for those users who are not worried about an accurate figure and wish to reduce the amount of daily work involved with TimePro Compact. To switch on Auto Close, see Job Costing setup on page 30

## Inputting of sold hours after a job has been closed (Hours per Job Basis, Upgrade Option)

Normally, a job would only be closed once it has been invoiced. However, some users prefer to 'close' a job after updating sold hours on all jobs whether they have been invoiced or are still in use. You may wish to do this, for example where a job spans a several days but you wish to update the sold hours on a day-by-day basis.
TimePro Compact does not have a problem with this, any new clock records will be open and only these open clockings can be edited.

To make the updating of sold hours simpler you can choose to select whether the total time is shown in the updating sold hours dialog box, or only the time that is applicable to open clockings. To set this option, select the 'Options' tab in the Job Costing setup screen. (Accessed by this button on the top toolbar: .) Check the box 'Update only OPEN Clockings with sold hours'. (See page 30)

The following example will illustrate this.

***Show all hours.***
Joe Bloggs works on a job 123456 on Monday for two hours. The following day the sold time is entered as two and half-hours and the job is "closed" in TimePro Compact. On Wednesday Joe works a further hour on job 123456. When the new clocking is viewed in TimePro Compact the input hours dialog will show three and a half-hours (two-and-a-half hours previously entered as time sold on the Monday clockings plus the one-hour spent on Wednesday).

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***Show only open hours.***

Using the previous example, if you have elected to show only open clockings, when the Wednesday clocking is viewed in TimePro Compact the input hours dialog will show one hour being the time spent on the job 123456 on Wednesday. The times sold from the previous clockings, which have now been closed, are not included.

## Other Toolbar Buttons (Job Costing)

Use the **First, Previous, Next** and **Last** buttons on the lower toolbar to move from Job to Job.

The '**Refresh**' Button shows the latest values, including changes made by other users on a network system.

The '**Calculate**' button will calculate the data to reflect any changes that are required if you have edited any data. You can see if this is required by looking at the status bar of the main screen, which will show the words 'Calculate Required'. There is also a 'Calculate' button on the top toolbar that carries out the same function. TimePro Compact will automatically calculate if it is required when you close the Job Costing screen.

Clicking the '**Find Next Un Matched Sale Code**' button will take you to the first record that TimePro Compact can find with an unknown sale code. Correct the error and click this button again to move to the next discrepancy and so on. If no errors are found TimePro Compact will give a message to that effect.

The **'Multiple Job Number Change'** button allows you to change all records with a particular job number to another number (or non-productive code) and sale code. This may be required if you had issued a temporary job number for the employees to clock onto and now wanted to change the clockings to the correct number. Enter the job number you want to change from and the number to change to. If you wish to change the Sale Codes, uncheck the 'Use existing Sale Codes' and enter the sale code you wish to use. Click 'Change', you will be advised how many records will be affected and given the option to cancel. The changes will be recorded in the Job Audit.

The '**Reset Job Close Date'** , from build 3.0.269, the date on which a job is closed is recorded. This is to allow the production of bespoke reports for some customers so will not be relevant to the majority of users. Use this button if you wish to change the 'Close' date

NOTE: Right clicking the mouse can access many of the above toolbar functions.

## Printing Job Time Labels for Job Cards

Printed labels with details of the Job Clockings are available for use with Job Cards for costing and auditing purposes. The labels identify the Job number, employee, sale type, time On, time OFF and the total time of the clocking.
To print the labels, use Avery © L7160 labels or equivalent. Click the 'Print Portable Labels' button on the top toolbar.
Select the Job, Date and employee options as required, if you are printing to a part used sheet of labels, select the column and row number that you want to start printing at.
Remember, you will have to have download the data from the Terminal, and correct any missed clockings before you can print the labels. If you are printing labels for the current day, be aware that the times may not be totally accurate if there are not an equal number of attendance clockings.

## *Viewing / Printing Reports*

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Reports are accessed by clicking the 🖨 button on the top toolbar.

A number or reports are available in TimePro Compact. These are listed in the dropdown box entitled 'Available Reports' and broadly fall into the following categories:

1. Today's Clockings
   This report shows the clockings for the current day. It is only as up to date as the last clock download. It shows each employees clockings, both attendance and job. No processing in terms of rounding or error checking will have been carried out. This reports is useful if the label printer fails and you need the current days clockings.

2. Clockings / Attendance / Payroll
   There are several reports giving clock readings, payroll and absence information.

3. Performance Summary
   This is one of TimePro Compact key reports. It only includes productive employees and summarises the attendance and job performance as well as showing labour sales and cost by sale type.

4. Job Costing / Performance Reports

   There are several reports that give information on job based work and non-productive activities. There are also Gross Profit and Work in Progress reports.

5. Shift, Day & Overtime

   This report lists all the settings for the Time and Attendance setup.

6. Bespoke Reports

   Any reports that have been created by MIM Systems for an individual customer will appear at the end of the Available Reports list.


## Filtering the data for reports

There are a number of criteria that can be used to filter the data used in the reports. These are shown on the reports screen and are divided into two categories, General Options and Job Costing Options. If criteria are not applicable to a particular report, it will be disabled and 'greyed out' to prevent you using it.

On the **General Options** tab you set options for Companies, Groups, Date Range and Employees.

For companies and date options, select the desired criteria from the dropdown boxes. If you choose custom dates, you can then set the 'From' and' To' date using the dropdown calendars.
For the groups, the default is All groups, to select individual groups, uncheck 'All Groups' and tick the box(es) next to the desired groups.
To select individual employees, click the Select button and choose the desired employees from the list (a maximum of 20 employees can be selected).

On the **Job Costing Options** you can set options for Job Status, Sale Types and Job Number(s).
Job Status can be set to 'All', 'Open' only or 'Closed' only.
Sale Types default to 'All' or you can select individual types (see groups above).

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Job Numbers default to 'All'. To show just one job number, type the number on the Job Number box. To use a range of job numbers type the lowest and highest in the 'From' and 'To' boxes. The 'Select' box will give you a list of all job numbers for you to choose from.

Remember that non-productive codes can be used wherever you use Job Numbers.

## Toolbar Buttons (Reports)

The three buttons are:
1. Close, close the Reports Screen
2. Print, This prints direct to the printer, we suggest you preview the reports first as some reports can be several pages long.
3. Preview, Shows the report on screen, you can then print the report be clicking the printer button at the top of the preview screen.

## *Employees*

Click the [icon] button on the top toolbar to view the Employee screen.
The screen has two tabs:

## Employee Tab

The employee tab has the following fields:

1. Number
   This is a unique number given to the employee when he is set up in TimePro Compact, it cannot be changed.

2. Status
   An employee can be either 'Current' or on 'Hold'. Hold should be used where an employee has left and may return, maternity leave for example, or the employee has left and you wish to retain the data for him. TimePro Compact will not generate any new records for an employee that is on hold. If you delete an employee, you will loose all data for that employee.

3. Full Name
   This is the full name of the employee. It must include one space so avoid using just first name or last names.

4. Clock Name
   This is the name that will be used at the clock terminal(s) when the employee clocks in and out. The maximum length is 18 characters and must include one space. If you change the full name, TimePro Compact will automatically create the clock name and if the full name is greater than 18 characters, will abbreviate it. You can change the abbreviated name if you wish.

5. Shifts Group
   This is the Shift Group that the employee belongs to. (See page 28)

6. Overtime Rule
   The overtime rule that the employee works under. (See page 24)

7. Group
   The employee group that the employee belongs to. (See page 24)

8. Default Job
   If an employee does not clock onto a job within the time set for AutoClock (see page 30), TimePro Compact will 'Clock' an employee onto his default job. You can choose any of the non-productive activities so a supervisor can be clocked on to Supervising or an apprentice onto Apprentice. For a normal productive employee we suggest you use 'Idle (AutoClock)'. If the employee does not clock on and off jobs, set this to 'Non Productive'.

9. Non Productive Factor
   If an employee clocks on and off jobs but is considered to be only part productive, because he is a supervisor or an apprentice for example, TimePro Compact will factor his time worked on jobs to account for this. (This applies only to the 'Performance Summary' Report). Enter the Non Productive factor.

## Confidential Tab

The confidential tab has the following fields:

1. Basic Pay
   This is the basic hourly rate for the employee. If this rate is not entered, the job costing and payroll reports will not be accurate.

2. Holiday Entitlement
   At the beginning of the holiday year, enter the entitlement for the employee; TimePro Compact will reduce the figure as you book holidays.

3. Payroll Number
   This can be used for a payroll code; it defaults to the employee number.

4. Start and Finish Dates
   Set the start date to the employee start date. The finish date should be set to the same as the start date until the employee leaves when it should be set to his actual leave date.

5. Notes
   This is a free field for any information you may wish to record about the employee.

## Adding a New Employee

To add a new employee, click the ☐ button on the lower toolbar. Enter a unique number for the employee. You are recommended to use numbers between 1 and 995.

Enter the full name for the employee, when you move to the Clock Name field, TimePro Compact will automatically enter this for you. Select the appropriate options for the employee for Shift Group, Group, Overtime Rule and Default Job. Complete the appropriate details on the 'Confidential' tab.

You should then programme the Data Terminal(s) with the employee names. (See page 19)

**Note: the employee and clock names should not include an apostrophe.**

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## Deleting an Employee

An employee should only be deleted if you are happy to loose all the data for that employee. If you wish to retain the data it is recommended that the employees status be set to 'Hold' (See 'Status' on page 15)

To delete an employee, click the  button on the lower toolbar.

*After adding or deleting an employee, remember to programme the TimePro Portable with the details, see page 19*

## Other Toolbar Buttons (Employees)

Use the **First, Previous, Next** and **Last** buttons on the lower toolbar to move from Employee to Employee.

The **Search** or find button allows you to search for an employee by name. Double click on the desired name in the list or start typing in the name of the employee. TimePro Compact will move to the employee you are searching for.

The **Input Basic Pay and Holidays** screen allows you to input pay and holiday entitlement for all employees via a single screen.

# Advanced Operations

## *System Setup*

The System Setup screen is accessed form the 'File' menu.

The following settings can be made:

1. Database Location
   This is the location of the TimePro Compact databases. On a single computer system this will normally be C:\TimePro Compact NG\Database. If TimePro Compact is being used on a network, this will be the path to the computer of server that has the TimePro Compact database files. The database files are called TPro2000.mdb and TimePro Compact.mdb. Use the 'Browse' button to set the location.

2. Backup File Location
   TimePro Compact creates a backup file on shutdown; you can select a different location (for example on a server) for this file
   Use the 'Browse' button to set the location

3. Portable Files Location
   This is the location for files used with the Portable units. (Please see separate instructions on the Portable units)

4. Clock Files
   When data is downloaded from the clock(s), it is saved in a file (see page 19). These files are saved in the location set here.
   Use the 'Browse' button to set the location.

5. Archive Files
   This is the location for Archive files. (See 'Archiving Data' on page 20)
   Use the 'Browse' button to set the location.

6. Days to Archive
   TimePro Compact will use this setting when you create an Archive file. (see 'Archiving Data' on page 20) This is the age, in days, over which you will archive data. For example, if it is set to 120, all data that is OVER 120 days old will be saved in the Archive file. All data that is UNDER 120 days old will be left in TimePro Compact.

7. Use This Computer for Backup and Compact
   At least one of the computers running TimePro Compact must have this option checked. If possible, it should be the computer that the databases are located on.

   With this option checked and TimePro Compact is shut down, provided no other computers have TimePro Compact running, the database files will backed up to a file called TPro200.bak in the same location as the database files. (See 'Restoring a Backup' on page 21 for details on restoring the backup files)

8. Warn if Backup File cannot be created on shutdown
   This option should be selected if TimePro Compact is used on a network and the databases are also located on a TimePro Compact PC. If this option is selected and a backup cannot be created because another user is logged into TimePro Compact a warning will be given not to shut down the computer.

9. This computer is connected to the Clock(s)
   Check this box if the computer is connected to the clocks.

## Programming the TimePro Portable with User Names, Sale Codes and Non Productive Codes

The TimePro Portable must be configured with the employee names, Sale Codes and Non Productive Codes before it can be used.
Start TimePro on the PC that is to be used with the Portable

1 Open the 'Clock Operations Screen'

2 Click the button on the lower toolbar 'Create User List for Portable units'

3 Use the Create User List screen to select the Employees that you wish to programme to the Portable. If you have more than one TimePro Portable, you can create different lists for each unit by selecting the appropriate unit number.

4 To create the list, click the 'Create List' button on the toolbar.

Creating a User list will also create the Sale Code and Non Productive Codes list, so if you create or amend Sale Codes or Non Productive codes in the TimePro software, you will need to create a User list in order to create new Sale and Non Prod lists for the Portable. You should then carry out a data download with the Portable but check the box 'Programme TimePro Portable with User Names, Sale and Non Prod Codes' see page 4

## Clock Files

When data is downloaded from the Terminal, it is saved in a file with .dat extension. The files are located in the folder set under 'System Setup' (See page 18). The name of the file will be the date the collection was made together with a number indicating the order that the file was created. The first will on any date will be 0 the second 1 etc. For example, 'Dec 22 2000 0.dat'.

These files can be viewed / edited from the clock screen (see 'Other Toolbar Buttons (Clock Screen)' on page 19)

## Other Toolbar Buttons (Clock Actions)

The **Clock / Modem Setup** button will show the Clock Setup screen, the following settings can be made:

1. COM Port of the Portable Cradle
2. The Version of the Software being used in the TimePro Portable Terminal

The **Open Data File** button will show the open file dialog box. Use this option if you wish to load clocking data direct from a file. This would only normally be done where the data file has been edited or copied form another computer.

**View Collected Clocking Files.** The clock files can be viewed and edited via this screen. The screen lists the clock files in descending date order but in ascending collection order. The right hand column gives a description of the type of file. (See 'Clock Files' on page 19)

The files can be viewed and edited by clicking the 'View / Edit' button on the lower toolbar.

The files can be reloaded into TimePro Compact by clicking the 'Reload Clock File' button. Reloading the file will not cause any harm as any duplicates will be ignored, however, any clockings that you may have deleted in TimePro Compact will be reloaded.

You may see a file called ClockError.txt. TimePro Compact creates this file if it detects an error with the data as it is downloaded from the clock(s). This can happen if electrical interference occurs or, if using a modem, there is interference on the phone line.
TimePro Compact will advise you of this at the end of the download process and give you the opportunity to view the error. If you view the file it will look something like this:

```
     21/11/00 18:07:39
Correct Format
##345678 dd DDMMYY  HHMM
Actual
00000054 TU 21110  1613
-----------------------
```

The first line shows the date and time that the error occurred.
The line under 'Correct Format' shows what TimePro Compact was expecting to find, in this case this is an attendance clocking. The first 8 characters are the employee number, the next 2 are letters denoting the weekday followed by 6 characters for the date (ddmmyy) and finally the last 4 characters are the time.

The last line will show what TimePro Compact actually got. In this case, you can see that the last '0' is missing from the year. You can edit the file to correct the error and then save it. Make sure that the actual line is the same as the correct line in all respects including spaces in and at the end of the line. You should then reload the file using the procedure described on page 19 (View Collected Files)

A job clocking is similar to the attendance clocking but has extra characters for the job number and sale type.

## *Archiving Data*

### Creating an Archive
As time passes, the data held by TimePro Compact will increase. This will slow down the calculation times, as more and more data has to be processed. Old data can be archived to a file. In this way, the data is not lost and can be viewed when required. (See 'Opening an Archive File')

When you create an archive file, all data that is over the age set in System Setup (see page 18) is saved to the archive file. From the 'File' menu, choose 'Create Archive'. This will show a save file dialog box, enter a name for the file such as 'Data up to 1-3-00' and click 'Save'. This operation can only be completed if the only user is the one creating the archive file. If TimePro Compact is in use by other users on a network you will get a message to tell you that the operation could not be completed.

### Opening an Archive File
To open an archive file, choose 'Open Archive File' form the 'File' Menu. To return to the current data, choose 'Return to Current Data' form the 'File' menu.

If TimePro Compact detects that the archive database needs upgrading, it will do this automatically when you open the archive file.

## *Backup*

### Creating Backups

There are two forms of backup that should be considered with TimePro Compact:

1. TimePro Compact Backup
   When TimePro Compact shuts down, backup files are automatically created' where possible the backup file should be located on another computer or server (see 'System Setup' on page 18). *This operation is only run from the computer designated for that purpose and only if no other users are running TimePro Compact.*

2. User Backup
   If the TimePro Compact backup is on the same computer as the main database, should the hard drive fail, both the original and backup could be lost. It is strongly recommended therefore, that users keep a backup of the data to an external device such as a Zip or Tape drive. Use the backup software for the device to backup the files TPro2000.mdb and TimePro.mdb. These files are located in the database folder as set in 'System Setup' 9 (see page 18)

### Restoring a Backup

To restore the TimePro Compact backup, choose 'Restore Backup' from the 'File' menu. (See also 'Database Repair' on page 22)

To restore a User Backup, follow the instructions of the Zip or Tape software.

## *Security*

By default, security is switched off. To activate security protection, choose "Password" from the setup menu. This will show the change password screen. You will notice that the user is 'master' and that the 'Old password' box is greyed out. To activate security, a password must be assigned to user 'master' this is done by entering a password in the 'Password' box and re-entering the same password in the box below. NOTE: passwords are CASE sensitive.

*A senior person such as the department manager should carry out the setting of the password for user 'master'. The password should be carefully recorded, as it will only be used to log on to TimePro Compact to assign or delete other users, set permissions or to disable security.*

### Setting up users

Once a password has been assigned to user 'master', close TimePro Compact and restart. You will now see a log in dialog box. Enter 'master' (lowercase and without the quotes) in the User Name box and the password you created earlier.

From the 'File' menu, choose "User Admin". (This operation is only available if you log on as user 'master'). From here you can create new users and delete existing users.

### To create a user
1. Enter the password for 'master'
2. Enter a name for the new user
3. Enter a password for the new user
4. Re enter the password

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(Note: User names and passwords can be any combination of letters or numbers but must be at least four characters and no more than ten characters. User names and Passwords are CASE sensitive)

Click the 'Add' button. A message will advise that the user has been added to the user list. To maintain security, the new user should log on to TimePro Compact and change his password to a password known only to that user.

A list of users is available by clicking the browse button next to the User Name box.

### To Delete a user
1. Log on as User 'master' and go to User Admin.
2. Enter the password for 'master'
3. Enter the User Name or select it from the list
4. Click the 'Delete' button.

### Changing a Password

If you need to change a password, log on as the User you wish to change the password for, select 'Password' from the 'File' menu. Enter the old and new passwords as required.

### Forgotten Password

If a user has forgotten their password, log on as 'master', delete the user and recreate as a new user.

### Disable Security

Log on as User 'master', select 'Password' from the 'File' Menu.
Enter the old password for 'master'. DO NOT enter anything in the new password boxes. Click 'Set'

### User Permissions

Once a user has been created, you can set permissions for that user. In this way you can restrict what a user can do and see in TimePro Compact.

You must be logged on as 'master' to set permissions.
Choose 'User Permissions' from the 'File' menu.

At the top of the Permissions screen is a dropdown box with a list of all users. Choose the user you wish to set permissions for.
By default, a user has permission to do everything in TimePro Compact. Uncheck the items that you do not wish the user to have access to. When you have set permissions for all users, close the permissions screen.

The user permissions will take effect the next time a user logs on.

## *Database Repair*

Occasionally, the TimePro databases may become corrupted. A computer being shut down when TimePro is still running usually causes this. Always ensure that all programmes are shut down before a computer is powered down.

If a database is corrupted you will probably be unable to start TimePro and will get an error message. Go to the windows start button, go to Programs and then to the TimePro NG folder. Click the 'Repair Utility' icon and follow the instructions.

If a database cannot be repaired, you will need to restore the backup file. This must be done by running the Repair Utility on the computer that is used for TimePro backup.
Run the Repair Utility, click the button 'Restore Backup' you will be advised of the date and time of the available backup. If you restore the backup, the original database file will be backed up.

After you have restored a backup, you will have to reload any clock downloads carried out since the backup (see Viewing Clock Files on page 19) you will have lost any data such as Sold Hours, New Employees etc that had been created since the backup.

## *Updates to the TimePro Compact software*

Software updates will be issued to you when required. You can also check the TimePro web site at www.timepro.co.uk to download updates.
Any update must be run on **ALL COMPUTERS THAT HAVE TIMEPRO COMPACT INSTALLED.**
If the update is received by CD Rom or floppy disc.:

1. **ENSURE TimePro Compact IS NOT RUNNING ON ANY COMPUTER**
2. Insert the CD or floppy disc as applicable
3. Go to the TimePro Compact NG folder on the Program Menu. Click the 'Update Utility' icon This will start the TimePro Compact Update Programme
4. Choose the update source (CD or Floppy disc) from the dropdown box. If you are using a CD or Floppy on another computer on a network, check the 'Use Network PC / Server' box and use the 'Browse' button to locate the network source.
5. Click Update
6. Wait until the progress bar has completed and a message box advises that the update is complete
7. Repeat the above an all computers running TimePro Compact
8. If the update fails for any reason, contact MIM Systems for advice

# Configuration of TimePro Compact

Before dealing with the details of the shift setup, please consider the following and how it applies to your company. Please take some time to study these carefully. They will help you to understand the way TimePro Compact works.

## *Companies / Groups / Rates of Pay*

To access Companies and Groups setup, click the  button on the top toolbar.

Normally, there will only be one company but you can have multiple companies each with their own groups of employees. However, all companies must use the same pay multipliers (see Rates of Pay)

Each company can be divided into groups for reporting purposes. These may be logical groups such as Office Staff and Productive Staff or could be teams of people within the same department. An employee can only belong to one group.

Up to five rates of pay are available, rate one is basic i.e. a multiplier of one. Typically you would have Time and one third, Time and one half and Double time but you can use any multiplier for the other four rates.

The screen has two tabs:

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**Companies / Groups Tab**
The left hand grid shows the companies (there must be at least one) together with the ID of the company. In the right grid is list of groups and the company ID of the company each group belongs to.

## To add a new Company or Group
Click the 'New' button on the lower toolbar. Choose company or Group as applicable and type a name for the new Company / Group.
If you have created a new group, click on the Company ID column in the group grid and assign the group to the correct company.

## To delete a Company or Group
Click on the Company or Group that you wish to delete and click the 'Delete' button on the lower toolbar. TimePro Compact will not allow you to delete a Company or Group that is in use.

**Defaults Tab**
On this tab you can set the rates of pay and their multipliers. Rate 1 should always have a multiplier of 1; the other rates can be anything you choose. These rates are used in the Day and Overtime Rules.

The Last Day of Week should be set before you use TimePro Compact for the first time. This is the 'Last' day of your pay week.

## *Day Rules, Shifts, Overtime and Shift Groups*

The setup screen for the above is accessed by clicking the  button on the top toolbar.
The setup screen has the following tabs:

Default settings. You will notice that there is a 'Default' for all of the above. TimePro Compact uses these when setting up a new employee. You can modify them if you wish but it is recommended that you create your own rules etc.

## Overtime
Two types of overtime rules are available in TimePro Compact:

**Daily Overtime**
An employee is paid overtime on a day-by-day basis, for example, the working day is eight hours and the employee works ten hours. He is paid two hours overtime regardless of the total hours worked for the week.

If you only use Daily overtime then you do not need to create any overtime rules as this is dealt with under the Day rules. (See 'Day Rules' on page 25)

**Weekly Overtime**
If an employee has to reach a weekly target before he is paid overtime, for example, on a forty hour week overtime only starts to be paid after forty hours has been worked irrespective of the hours worked on a day by day basis.

It is possible to specify exception days (up to three) for example Saturdays and Sundays, when an employee will be paid at overtime rates even though the target has not been met.
You can have as many weekly rules as you wish, for example, a weekly rule with a target of twenty hours for part time staff and a weekly rule with a target of forty hours for full time staff.

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*Note:*
An employee can only have one type of overtime but you can have different employees on different rules, for example, office staff may be on a weekly rule whilst productive staff could be on a daily rule.

To **Create an Overtime Rule**, click the 'New' button on the lower toolbar and enter a meaningful description such as 'Weekly 40' (You can have two overtime rules, if you need more then the software can be upgraded, see page 31)

Enter the hours (in decimal) to pay at each rate. For example, 40 hours at rate 1, 20 hours at rate 2 etc.

If you wish to apply Daily Overtime on specific days. Choose the days from the dropdown boxes. If you want the weekly target to be reached first, check the 'Hit Target First' box. If you use this option, make sure that the Day Rules for these days are set up with the hours and pay rates that you wish to pay.

If you want to enforce Time Banding (see 'Day Rules' on page 25) from the Daily Rules, check the 'Force Time Band Rules' box.

The 'Week Ends' Time denotes the time, on the last payday of the week that the week ends. Any work after that time will be carried forward to the next pay week.

## Day Rules

A Day Rule is required for each type of 'Day' an employee could work.
The number of Day Rules you require will depend on the complexity of you working patterns. There follows two examples that will help to illustrate this:

**Example One, Simple 40 Hour week.**
Employees work Monday to Friday with the same start and finish times. On a Saturday, they work only the morning.

In this example only two 'Day Rules' would be required:

|  |  |
|---|---|
| Day Rule One: | Mon to Fri |
| Day Rule Two: | Saturday |

**Example Two, Early and Late Shift each day, shorter day on Friday.**
Employees can work Monday to Thursday on either an early or late shift. On Friday, the working day in one hour less. On a Saturday, they work only the morning.

This would require the following Day Rules:

|  |  |
|---|---|
| Day Rule One: | Mon to Thur, Early shift |
| Day Rule Two: | Mon to Thur, Late shift |
| Day Rule Three: | Friday, Early shift |
| Day Rule Four: | Friday, Late shift |
| Day Rule Five: | Saturday |

To **Create a Day Rule**, click the 'New' button on the lower toolbar and enter a meaningful description, for example, 'Productive Early'

The basic elements of a day rule are:

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1. **Start Time**: The start time for the day e.g. 08.00.

2. **Finish Time**: The finish time for the day e.g. 17.00.

3. **Overtime Start before shift**: When do you want to pay overtime to someone who clocks in before shift start? For example, on a shift start of 08.00, setting this to 07.30 will only pay overtime if an employee clocks in before 07.30, if he clocks in after 07.30 he will be paid from 08.00.
   If this field is left blank then the employee will not be paid until the start time regardless of when he clocks in.
   If it is set to the same time as the start time then the employee will be paid overtime from when he clocks in (subject to grace and rounding rules)

4. **Overtime Start after shift**: How much time do you want to allow after the shift finish time before overtime kicks in? This allows for cleaning up etc and is typically 15 minutes.

5. **Paid absence hours**: If an employee is absent and is to be paid (e.g. Holiday) the number of hours to pay. (TimePro Compact uses the first day rule that an employee could have worked for a given day, see 'Shift Groups' on page 28)

6. **Minimum Time to Work before overtime Starts**: Enter the minimum time in hours and minutes, that an employee must work before getting overtime. TimePro will compare the total time worked against this setting and the value set in the Hours to Pay at Rate 1 (or Rate 2 if Rate 1 is blank, Rate 3 if Rate 2 is blank and so on). If the total time worked is greater than the Rate time but less that the Minimum Time to Work, then the total time is reduced to the Rate Time. Leave this setting blank if you wish the employee to move onto overtime as soon as the Rate time is exceeded. This setting is not applicable to Day Rules that go over midnight.

   If using this setting on a Day Rule that applies to an employee on a Weekly Overtime Rules, you would normally set Rate 1 to 23:59 but for this facility to work you must setup Rates 1, 2 etc as for a normal Day Rule

   If you use this option with an productive employee you need to be aware on the effect it has when producing the Performance Summary Reports. On these reports, you will see a column 'Unpaid Hours'. This is the time deducted from the attendance time by enforcing this option. The value of the Unpaid Hours is also deducted from the Productive Time (Time clocked on Jobs) for the employee. This is to ensure the Utilisation, Productivity and Efficiency calculations are meaningful.

7. **Grace Times**: How many minutes grace on clock IN and OUT (they can be different for IN clockings and OUT clockings but all IN's will be the same as will all OUT's)

8. **Rounding Times**: If the grace period is exceeded, what rounding to apply? For example 15 minutes. (Again, they can be different for IN clockings and OUT clockings but all IN's will be the same as will all OUT's)

9. **Flag if Early Finish, Late Start or Absent**: the TimePro Compact reports can show if an employee has started late, finished early or was absent on the day. Click the check boxes as applicable.

10. **Hours to Pay at Rate 1,2,3,4 and 5**: This is applicable to Daily Overtime Rules AND exception days for Weekly overtime. Enter the hours to pay at each rate, for example, the first eight hours at rate one, the next two at rate two, the rest at rate three etc. if this is a

Weekly Overtime day it will be 23.59 hours at rate one. (Unless using the Minimum Time to Work option)

11. **Time Banding**: You can specify a different rate of pay if an employee works between certain times, for example, if he works between 05.00 and 08.00 in the morning, pay at rate two irrespective of overtime rules.

12. **Cash Adjustment** If a shift allowance or other payment is to be made if this shift is worked, enter the amount and reason.

13. **Deduct Break**: If you do not want an employee to clock OUT and IN for an unpaid break, enter the minutes to deduct. *Note:* This time will always be deducted irrespective of whether it was actually worked on not. Productive employees (employees who clock on and off jobs) must always clock breaks to ensure accurate job times, so you should NOT use this option on a day rule that is to be used by productive employees.(See also AutoClock Break)

14. **AutoClock Break** Normally, productive employees should clock OUT and IN for lunch breaks, however, if this is not possible you can set an OUT and an IN time for the break in the day rules. Clockings will be automatically entered the first time a day is calculated. If you subsequently delete the clockings, they will not be reapplied during calculation.

15. **Allow Flexi Breaks** By default, the Rounding settings are applied to all attendance clockings. This can cause problems if you wish to use roundings of, say, 15 minutes but wish to allow employees to clock lunch breaks on a flexible basis, for example 12:10 to 12:40. If 15 minute roundings are used here, the employees clockings will be rounded to 12:00 and 12:45. By selecting 'Allow Flexi Breaks' all attendance clockings EXCEPT the first and last clocking of the shift will be rounded to 5 minutes. If you use this option, the Grace on IN and Grace on OUT should be less than 4 minutes

## Shifts

A 'Shift' consists of a set of Day Rules, Monday to Sunday. In the examples given earlier:

**Example One (Simple)**

Only one shift is required:

| Shift One | Day | Day Rule |
|---|---|---|
| | Mon | One |
| | Tue | One |
| | Wed | One |
| | Thu | One |
| | Fri | One |
| | Sat | Two |
| | Sun | Default[1] |

**Example Two (Complex)**

Two Shifts would be required:

---

[1] A Default Rule is provided for days that are not normally worked

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| **Shift Early** | **Day** | **Day Rule** |
|---|---|---|
| | Mon | One |
| | Tue | One |
| | Wed | One |
| | Thu | One |
| | Fri | Three |
| | Sat | Five |
| | Sun | Default[1] |

| **Shift Late** | **Day** | **Day Rule** |
|---|---|---|
| | Mon | Two |
| | Tue | Two |
| | Wed | Two |
| | Thu | Two |
| | Fri | Four |
| | Sat | Five |
| | Sun | Default[1] |

To **Create a new Shift** click the 'New' button on the lower toolbar and enter a meaningful description such as 'Early Weekday' (You can have three shifts, if you need more then the software can be upgraded, )

In the grid at the right of the screen you will see a list of weekdays. Against each day, click on the dropdown box and choose the Day Rule that you wish to use for that day.

Repeat the above for all the Shifts that you require.

Night Shift (Upgrade Option)
If a shift goes over midnight, check the 'Shift goes over Midnight' box. You will also need to enter the overflow time. This is the time, in hours and minutes that TimePro Compact will look after the shift end time for the last OUT clocking. If an OUT clocking is not found in that time you will get an 'Uneven Clockings' message in the Status column on the Time and Attendance screen.

To **Delete** a Shift, click the 'Delete' button on the lower toolbar. TimePro Compact will not allow you to delete a Shift that is in use.

## Shift Groups

The last element is the 'Shift Groups'. This is where TimePro Compact can work out which shift and day rule to place an employee in based on the first IN clocking of the day, using the examples given before:

**Example One (Simple)**

The Shift Group would be:

Clock IN Time Until:          23.59
Use Shift:                    One

**Example Two (Complex)**

The Shift Group would be:

Clock IN Time Until:        11.00
Use Shift:                 Early

Clock IN Time Until:        23.59
Use Shift:                 Late

In this example we can see that an employee who clocks in at 08.00 on Monday will be placed in the Early shift and will use Day Rule One. If on Tuesday, he clocks in at 14.00 he will be placed on the Late shift and will use Day Rule Two.

To Create a Shift Group click the 'New' button on the lower toolbar and enter a meaningful description such as 'Early and Late'.

Use the 'Add Shift' button to add as many shifts as required (the new shift will be 'Default', click on the dropdown box and select the desired shift.)

The shifts should be in the order that an employee could use them, for example Early, Late, and Night etc. if a night shift is involved it should always be the last shift.

Against each shift, enter the 'Until' time. TimePro Compact will look at the first IN clocking and decide which shift the employee is using based on the 'Until' time. (see the example above)

To **Delete** a Shift Group, click the 'Delete' button on the lower toolbar. TimePro Compact will not allow you to delete a Shift Group that is in use.

## Shift Organiser

The combination of Day Rules, Shifts and Shift Groups can become quite complex. To see the combination in a graphical layout, click the  button on the top toolbar.
This screen is for information only and shows how the Shift Groups, Shifts and Day Rules fit together. Click the + signs to expand the views and the – sign to collapse the views.

## *Job Costing Setup*

The Job Costing Setup is accessed by clicking the  button on the top toolbar.

The screen has three tabs:

## Sale Codes

These are the codes that the employees use when they clock onto a job. Number 5 is always Non-Productive and should have a value of £00.00.

To **Add** a new code, click the 'New' button on the lower toolbar. Enter the number (between 10 and 60), a description and a value for the code. The value should be the average rate per hour that this work is sold for. (You can have up to four Sale Codes, if you need more then the software can be upgraded, see page 31)

The descriptions and values can be edited directly in the grid at any time.

If you create a new code, you will need to programme the Terminal(s) with the new codes, see page 19

To **Delete** a code, click in the grid on the code you wish to delete and click the 'Delete' button on the lower toolbar. TimePro Compact will not allow you to delete a code that is in use.

## Non-Productive Codes

These are the codes that are used on the downtime activities.. An employee at the Terminal uses these codes when he does not have a job to clock onto. (You can have up to six codes, if you need more then the software can be upgraded, see page 31)

There are two types of Non-Productive work:
1. Allowed
   These are activities where an employee could not physically work on a productive job. For example, driving, on-site training etc. you should use the number range 2000 to 2040 for these codes.

2. Disallowed
   These are activities where an employee would be available to work on a productive job. For example, waiting or idle time. You should use the number range 2041 to 2050 for these codes.

Whether a code is allowed or disallowed is used in the 'Performance Report'. On all other reports Non-Productive time is shown as zero time sold.

To **Add** a new Non-Productive code, click the 'New' button on the lower toolbar. Choose Allowed or Disallowed and enter a description.

To **Delete** a code, click in the grid on the code you wish to delete and click the 'Delete' button on the lower toolbar. TimePro Compact will not allow you to delete a code that is in use.

## Options

The following options can be set for Job Costing:

1. Sold / Allowed Hours Input
   The standard is per employee per day. (See 'Inputting Sold / Allowed Hours' on page 11)
   You can upgrade to Hours per Job see page 31

2. Update only OPEN clockings with sold hours (Applies to Hours Per Job Version)
   See 'Inputting of sold hours after a job has been closed' On page 12

3. Prompt to Close after Updating Sold / Allowed Hours (Applies to Hours Per Job Version)
   Check this box if you want to be prompted to close a job after sold hours has been updated.

4. Days to look back for last job.
   If you set an employees 'Default Job' to 'Last known clocking' this is the days that TimePro Compact will look back. If no job is found TimePro Compact will clock the employee onto 'Idle (AutoClock)'. (See 'Default Job' under 'Employee Tab' on page 15)

5. Minutes before AutoClock invoked
   (See 'Default Job' under 'Employee Tab' on page 15)

6. Job Number size

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Choose either six or eight  (NOTE this setting will not alter the ability of the TimePro Compact Terminals to accept either 6 or 8 digits

7. Auto Close, This option is only available when inputting sold hours on an Employee per Day basis. If checked, any jobs older than the number in the 'Days to keep WIP' will be closed when you do a clock download

## *Upgrading the features of the TimePro Compact Software*

TimePro Compact has been designed for users with smaller workforces who do not need the sophistication of the full TimePro hardware and software. However, certain features can be added or included at extra cost, please contact Motor Industry Management Systems Ltd on 01246 267715 for details of costs and upgrade instructions.

The following table shows the features of TimePro Compact that can be upgraded.

| Feature | Standard | Upgradeable |
|---|---|---|
| Employees | 10 | Yes |
| Productive Employees | 4 | Yes |
| Total Shifts | 3 | Yes |
| Total Overtime Rules | 2 | Yes |
| Night Shifts | No | Yes |
| Maximum Sale Codes | 4 | Yes |
| Maximum Non Productive Codes | 6 | Yes |
| Sold Time Per Job | No | Yes |
| Override Overtime Calculations | No | Yes |