TimeVision Plus User Guide Version 2.2.7

Main Menu

When you first launch TimeVision Plus, you'll be greeted by the following screen.

Along the top, you'll see a series of icons.

These icons each have different functions, listed below (from left to right):

1. **Logon/Logoff** – This allows you to log on or log off.

2. **Setup** – This allows you to configure TimeVision's setup, and also gives you the ability to backup and restore data.

3. **Schedules** – This allows you to configure shifts for your employees, and specify their start time, finish time and breaks, etc.

4. **Groups** – This allows you to assign any schedules you have created to your employees.

5. **Employees** – This allows you to create, edit and/or delete any employees on your database.

6. **Edit** – This allows you to view when employees clock in/out, the day and date, what rate they are being paid for their hours worked, and any error codes or anomalies.

7. **Reports** – This allows you to view a number of reports based on the data gathered (e.g. “Absence Report”).

8. **Export** – This allows you to export the clocking data into a CSV file or directly to your Sage payroll system.

9. **Exit** – This will exit the application.

Along the bottom of the screen, you’ll see a bar. This has three main sections.

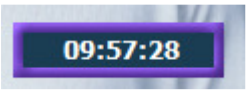
On the left hand side, you’ll see the “**User**” field.

This tells you which user is currently logged in to the system.

In the middle, you’ll see a “**Download**” button.

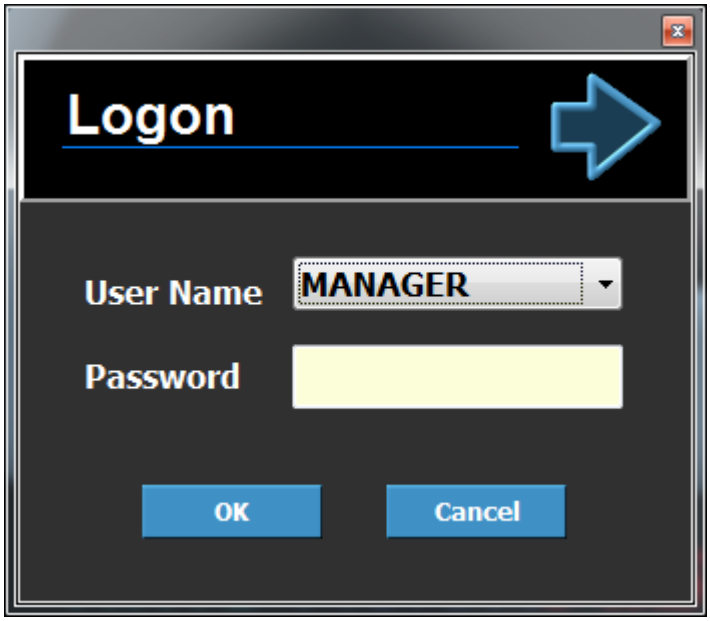
This allows the program to connect to the clocking terminal in order to collect the clocking data stored on it. ***We recommend you do this at least once a day because terminal failure may result in data loss. Additionally, the more data that needs to be downloaded, the longer time it will take.***

On the right, the current time is displayed.



To log in to TimeVision Plus, click the “**Logon**” button.

This will take you to the following screen, where you will need to select your username in the “**User Name**” list, and then type your password in the “**Password**” field.

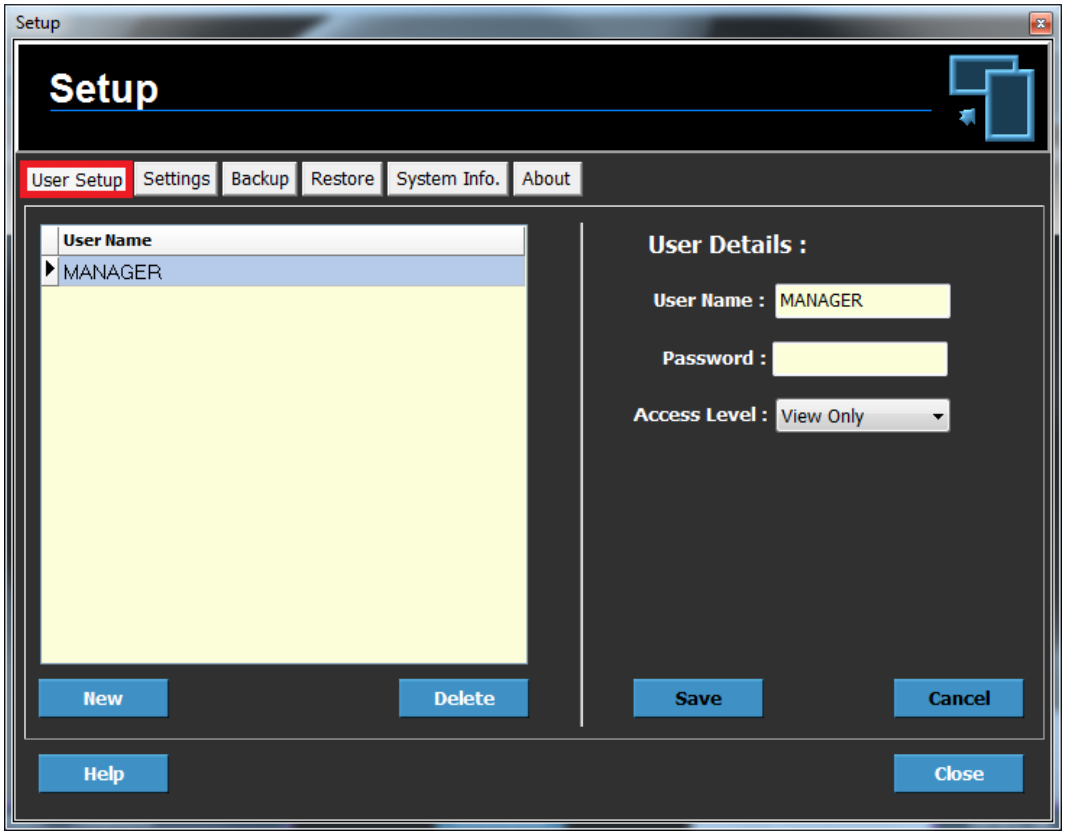


By default, the username is “Manager” and there is no password. ***We recommend you change this ASAP for security purposes and to avoid unwanted changes to your data.***

Setup

This is where you can make changes to the TimeVision Plus software.

The first section is “**User Setup**”.



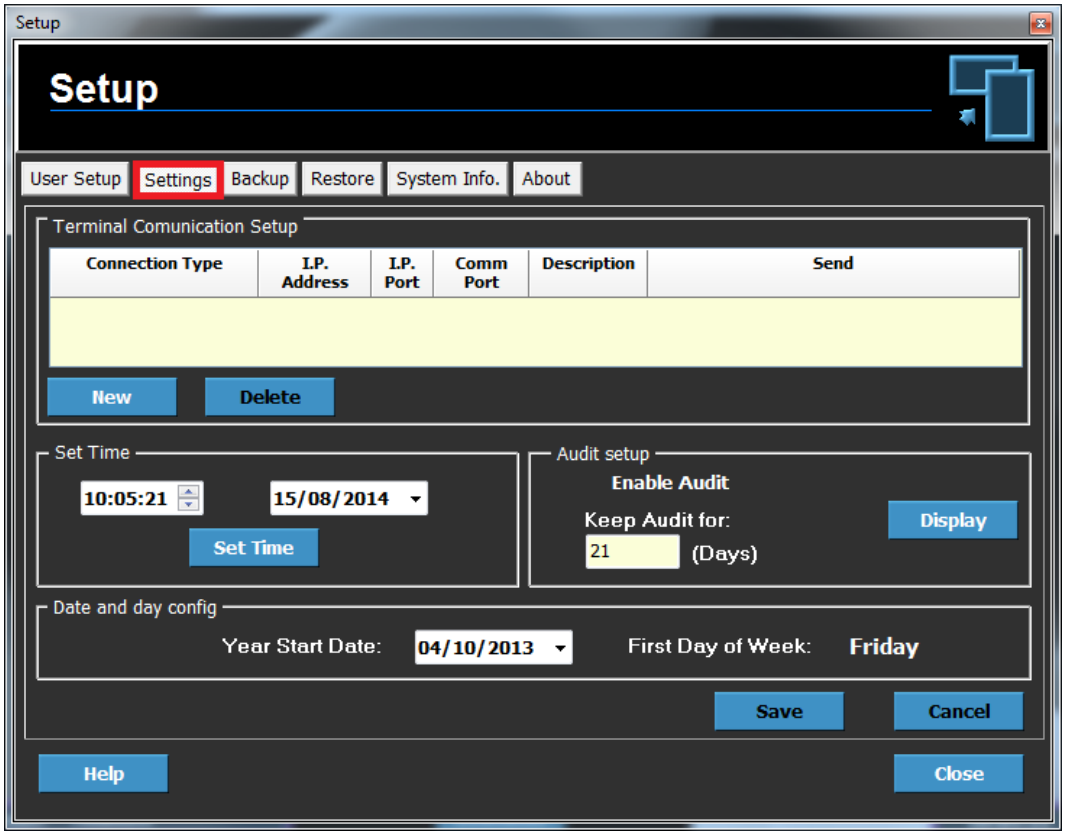
This is where you can add and remove users from the system. You need to assign a user name, password and access level to each user. There are two access levels that can be assigned to new users:

- **Edit** – This gives the user full control of the system.
- **View** – This allows the user to view data and run reports, but they will not be able to change anything.

If no users are defined, everyone can use the system and change the data, so it's highly recommended that at least one user is defined for security reasons.

When assigning a password to a user, the password length is limited to 20 characters, but can include a mixture of numbers and letters. ***Please note that passwords <u>are</u> case sensitive.***

The next section is "**Settings**".



"**Terminal Communication Setup**" will allow you to add a clock to the system (though this should already have been done for you). There are two ways of doing this – through TCP/IP or Serial.

- **TCP/IP** – This allows the clock to be accessed over a network. The default IP address is 192.168.0.200, and the default port is 56666. *You*

may change the IP address for your convenience, but you will need to change the IP address at the terminal as well.

- **Serial** – This allows the clock to be connected directly to the PC via a RS-232 cable. If this is the method used, you will need to select that the COMM Port is being used.

For Fingerprint and Proximity terminals, once you register an employee, you need to update the information using the '**Send**' button. For Magnetic Swipe, you just need to enter the card number shown on the card itself, and the system will pick up the rest of the details automatically.

You can also "**Set Time**". This will change the time and date of the clocking terminal.

"**Audit Setup**" will allow you to create audit files – these will give details of any changes to the system, e.g. editing data, entering the setup screen. The audit will enable you to keep track and monitor which buttons and options have been enabled. If you have defined System Users, the audit will also show who was logged in at the time. If you do not wish to record this data, uncheck "**Enable Audit**".

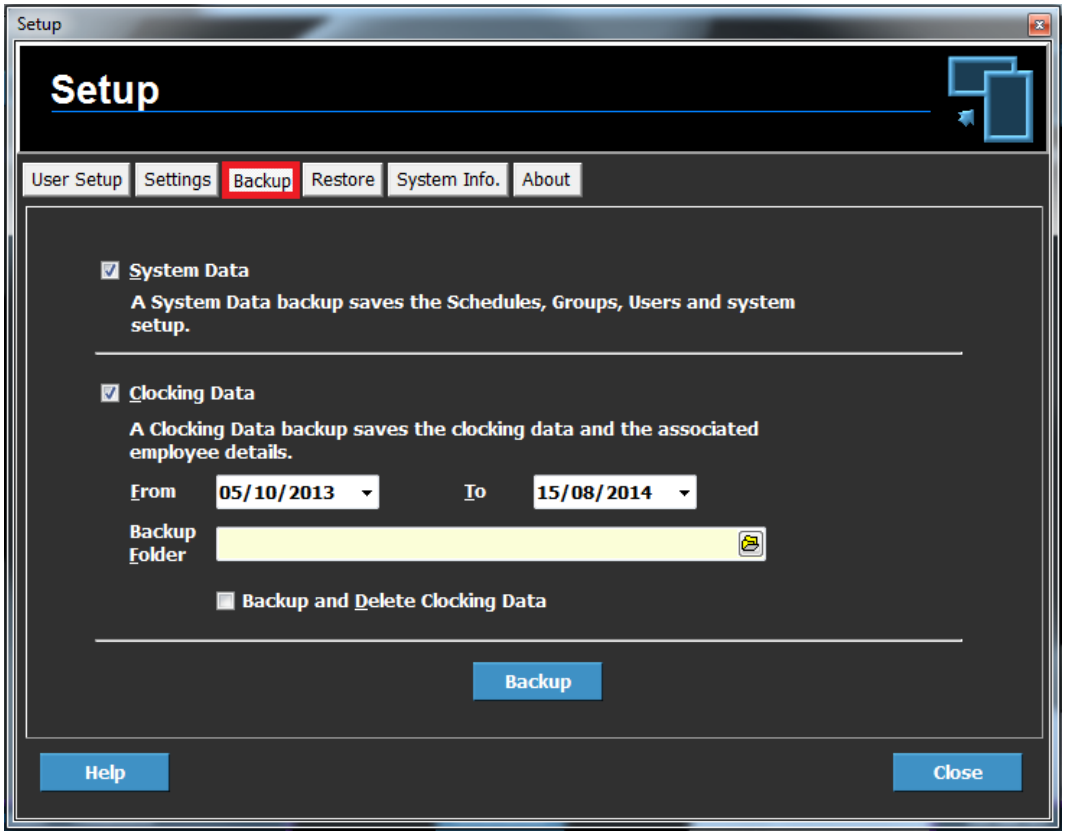
Clicking "**Display**" will bring up the audit report if "**Enable Audit**" is checked. The information in the audit includes:

- The time the action took place.
- The computer used when the action took place.
- Which user performed the action.
- The action, e.g. "clicked on Logon button"

If you wish to keep an audit, from here you can specify how long the recorded data should be kept for. You can also display an audit, or delete any currently stored audit data.

You are also able to configure the "**Date and Day**". This will default as the day the system was installed, but can be changed. It will also affect which day the system considers to be the first day of the week. ***We recommend you change this to reflect the first day of your working week.***

The next section is "**Backup**".



This allows you to save a copy of your data that can be used later to recover any lost or corrupted data.

<u>Important:</u> You should backup your data on a regular basis in case of any problems that could corrupt or destroy your data. This backed up data can easily be restored using the 'Restore' function within TimeVision.

There are two different types of backup that are supported by TimeVision; '**System Data**' and '**Clocking Data**'.

- "**System Data**" will create a backup of your schedules, groups, registered users and your general system setup which will be saved to the specified folder.

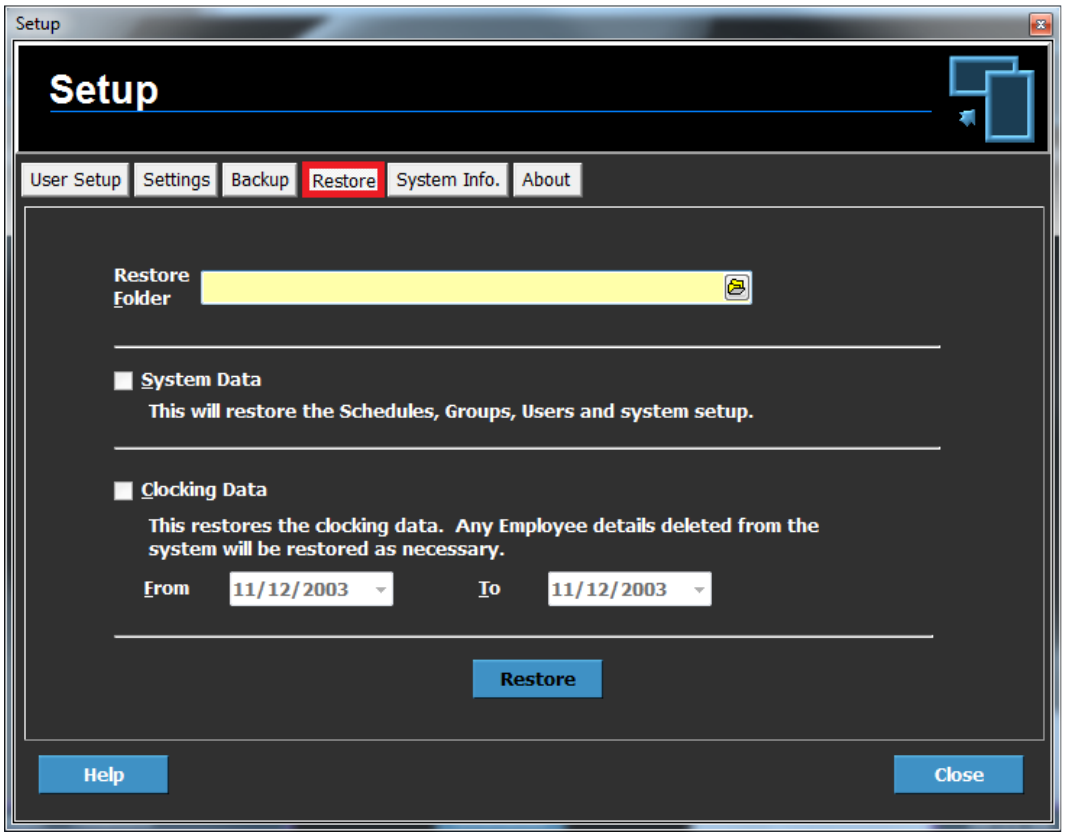
- "**Clocking Data**" will create a copy of all of your clocking data (between two specified dates) and any associated employee data which will be saved to the specified folder.

<u>Important:</u> We recommend storing any backup data on a removable media such as CD, USB stick or a network drive. It is also advisable that a copy of your backup should be taken offsite regularly in case of fire or theft.

The "**Backup and Delete Clocking Data**" option will allow you to back up the clocking data and then delete it from the current data. (This data can then be recovered at any time using the "Restore" option).

To backup your data, all you need to do is click the “**Backup**” button.

The next section is “**Restore**”.



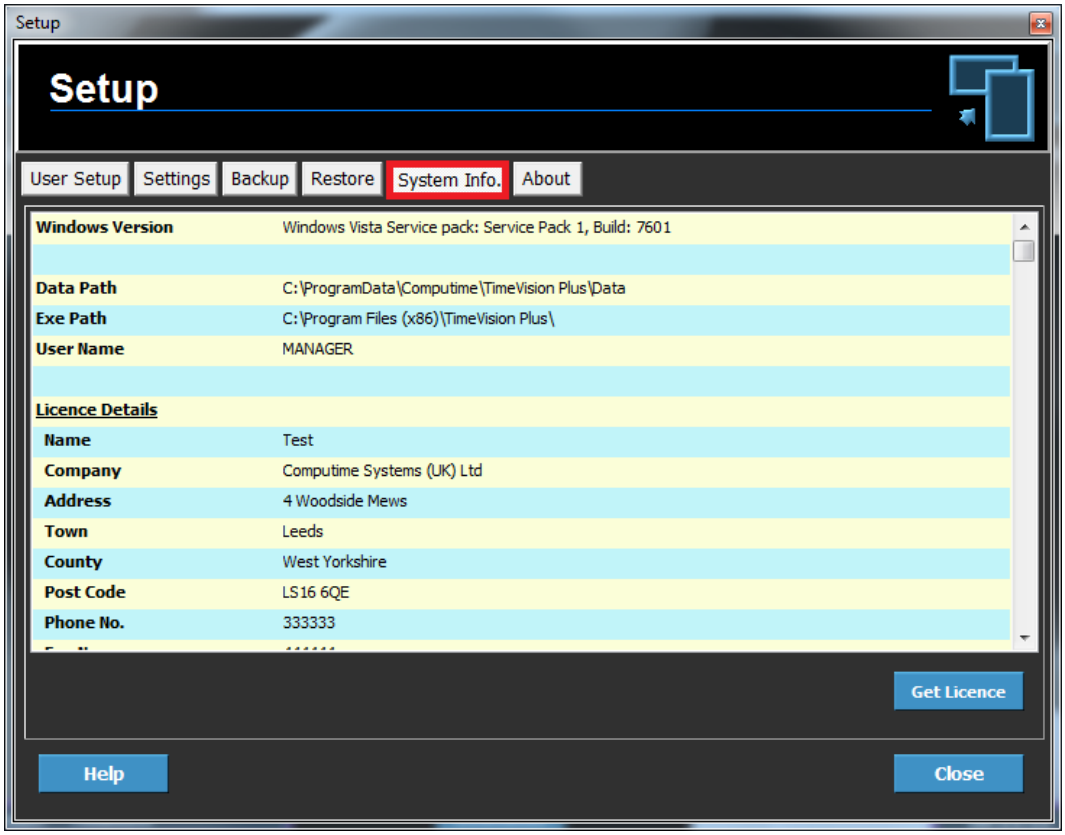
This allows you to retrieve any previously backed up data. This is mostly used in case of data corruption, or if any data is lost.

“**Restore Folder**” allows you to tell the system where the backup you saved is kept, so you can restore the data saved in the backup.

This allows you to select which data should be restored. If you have configured your Restore Folder correctly, the dates should have already been put in for you, though they can be edited as required.

To restore your data, all you need to do is click the “**Restore**” button.

The next section is “**System Info.**”



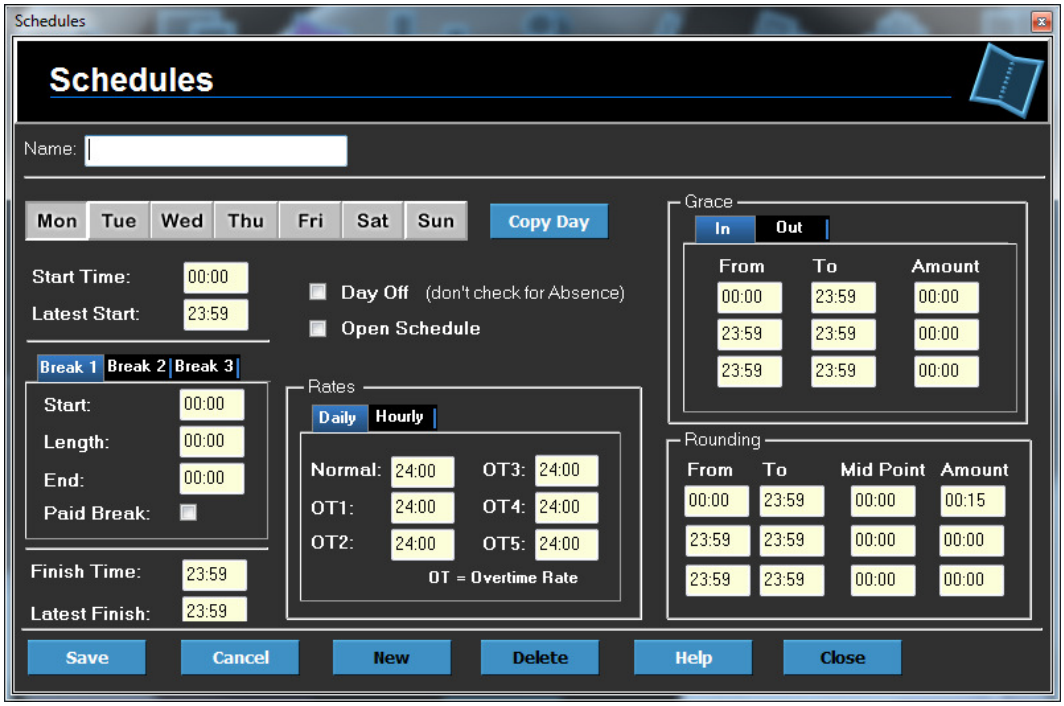
This provides you with information about your system setup, e.g. your database, data paths and networking settings. If you contact the Support department, you may be asked for this information.

The next section is “**About**”.

This tells you which version of TimeVision Plus you're currently using. If you contact the Support department, you will be asked for this information.

Schedules

To begin setting up shifts for your employees, click "**Schedules**" from the main menu.



The "**Start Time**" and "**Finish Time**" allow you to specify when you would like the employee's shift to start and finish. If they clock in after the time specified, they will be marked as 'Late' on the report.

The "**Latest Start/Finish**" field means that if the employee clocks in/out after the specified time, they will be moved to the next available shift. This is why, if the employee only works one shift a day, it's recommended that the Latest Start/Finish value remains at 23:59.

The "**Lunch Start**" and "**Lunch End**" fields allow you to specify when the employee's lunch break should start and end.

The "**Lunch Length**" field allows you to specify how long the employee's lunch break should be. This means that if the employee does not clock in/out for lunch, the lunch length you have specified will be automatically deducted from their hours worked.

If an employee clocks in/out but takes longer than the allocated lunch length, the actual time they were clocked out for will be deducted.

"**Grace Bands**" allow you to specify times when an employee is allowed some leeway when clocking in.

*<u>For example</u>: An employee may have a start time of 08:00, but if they clock in up to 08:03 you still want to pay them from 08:00. This would be a grace band running **from** 08:00 **to** 08:03, of **amount** 00:03.*

"**Rounding**" allows you to specify how you want your rounding to occur. When an employee clocks in, it will automatically round up – and when they clock out, it will automatically round down.

You can define three different bands throughout the days with differing rounding bands, as shown above. If you wanted to only pay your employees in 15 minute intervals, an example of how rounding works would be that if they clocked in at 08:05, it would round up to 08:15.

"**Daily Rates**" are used in defining how the hours worked in a day are split.

For example: If you wanted to pay the first 7 hours at Normal rate, the next hour at Overtime 1 and the next two hours at Overtime 2 – you would set ***Normal*** *to 07:00,* ***Overtime 1*** *to 01:00 and* ***Overtime 2*** *to 02:00.*

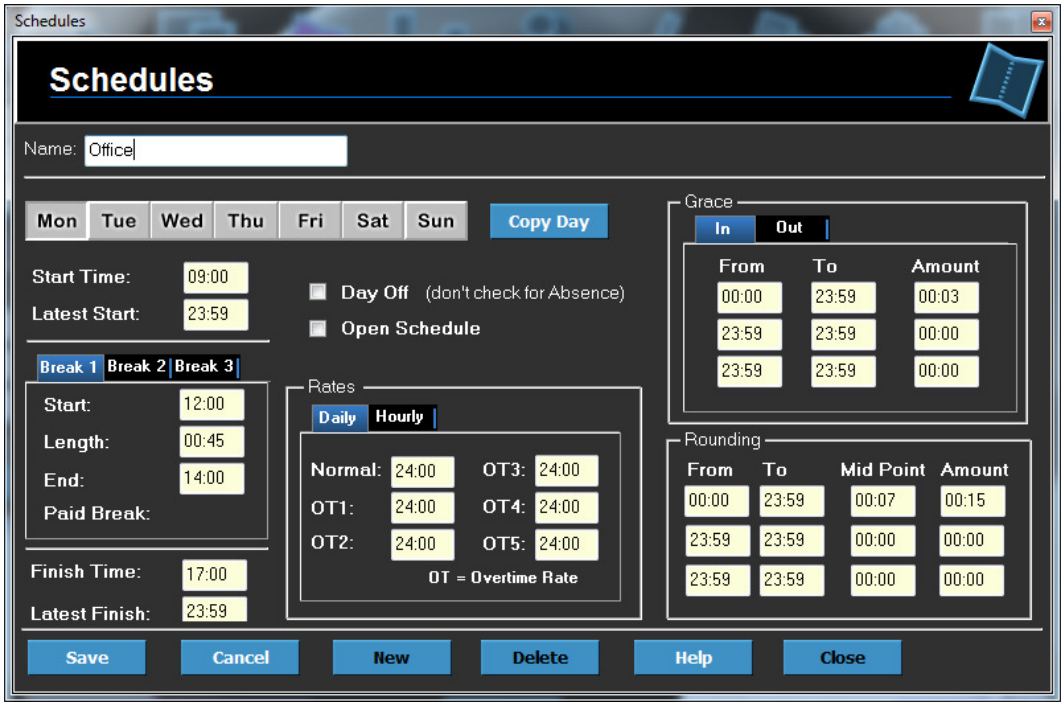
"**Day Off**" and "**Open Schedule**" are the final sections of 'Schedule'.

"**Day Off**" allows you to record when an employee is not expected to work.

This should not be checked if an employee is absent – this function is specifically for when the employee has a day that they are not scheduled to work.

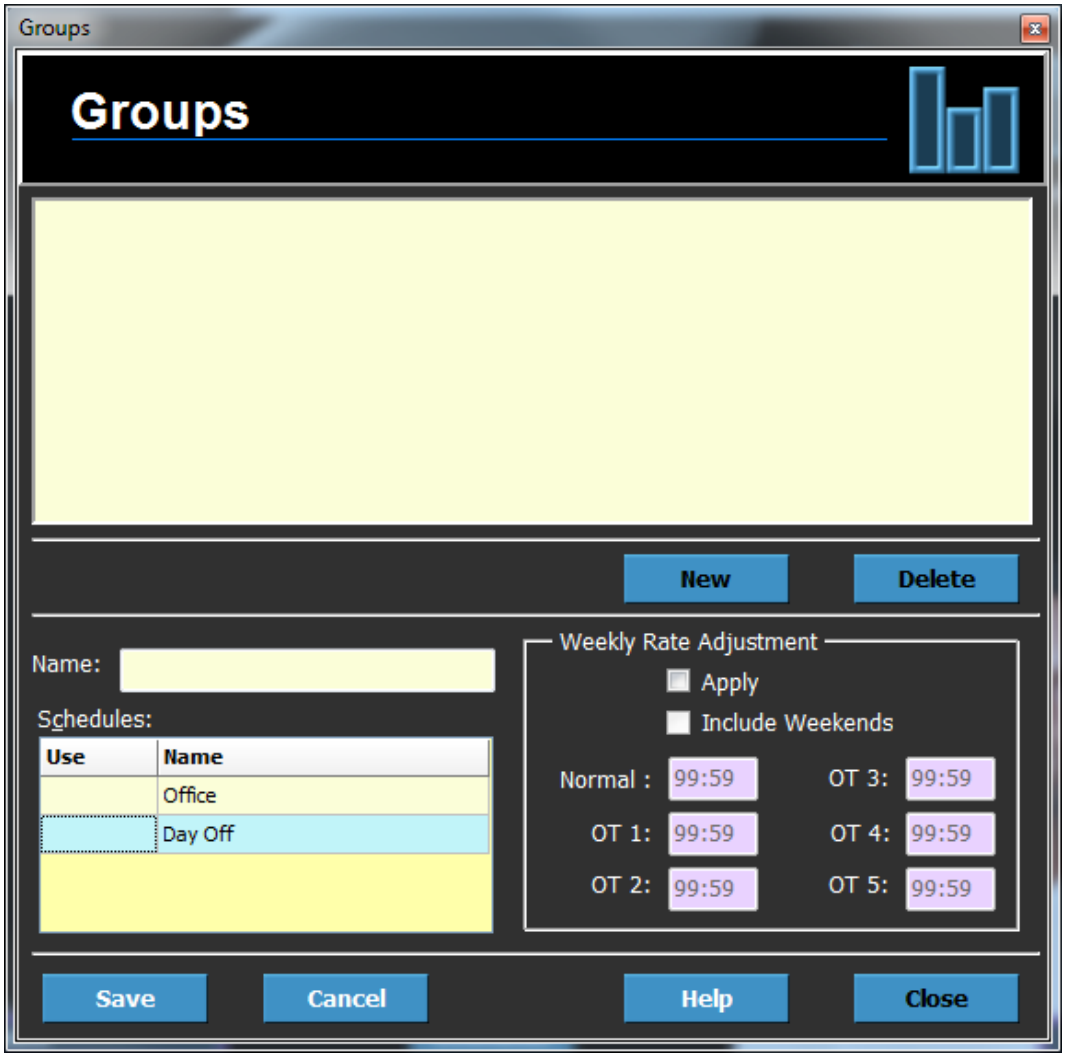
"**Open Schedule**" allows you to create a schedule with no fixed start time. This means that an employee can never be flagged as late, because clicking 'Open Schedule' means that the "Start Time" and "Latest Finish" boxes will be disabled.

Below is an example of a standard 09:00-17:00 shift (with a 45 minute lunch break):



Groups

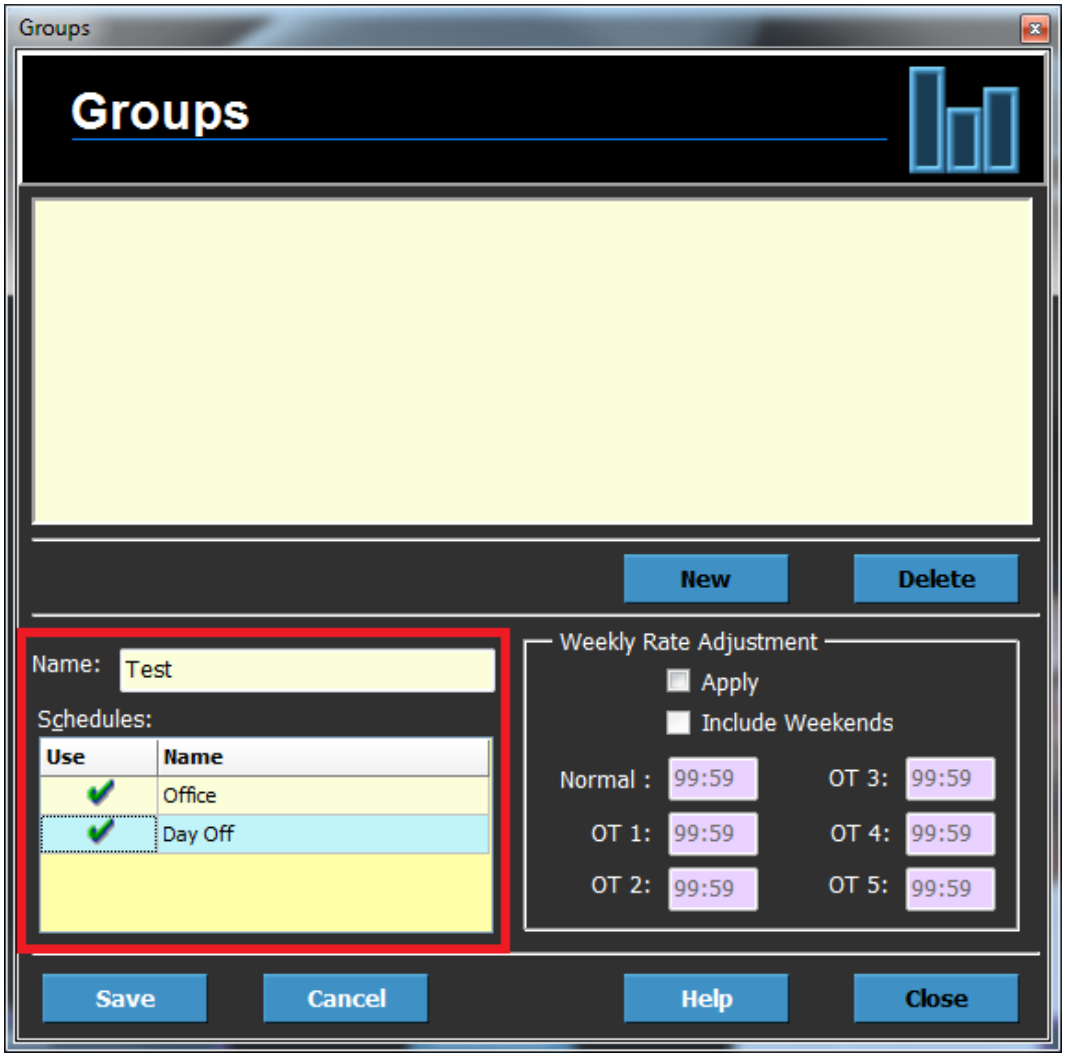
To begin setting up groups for your employees, click “**Schedules**” from the main menu.



Groups allow you to group schedules together. These schedules can then be assigned to your employees. It's also possible to specify weekly overtime rules for individual groups.

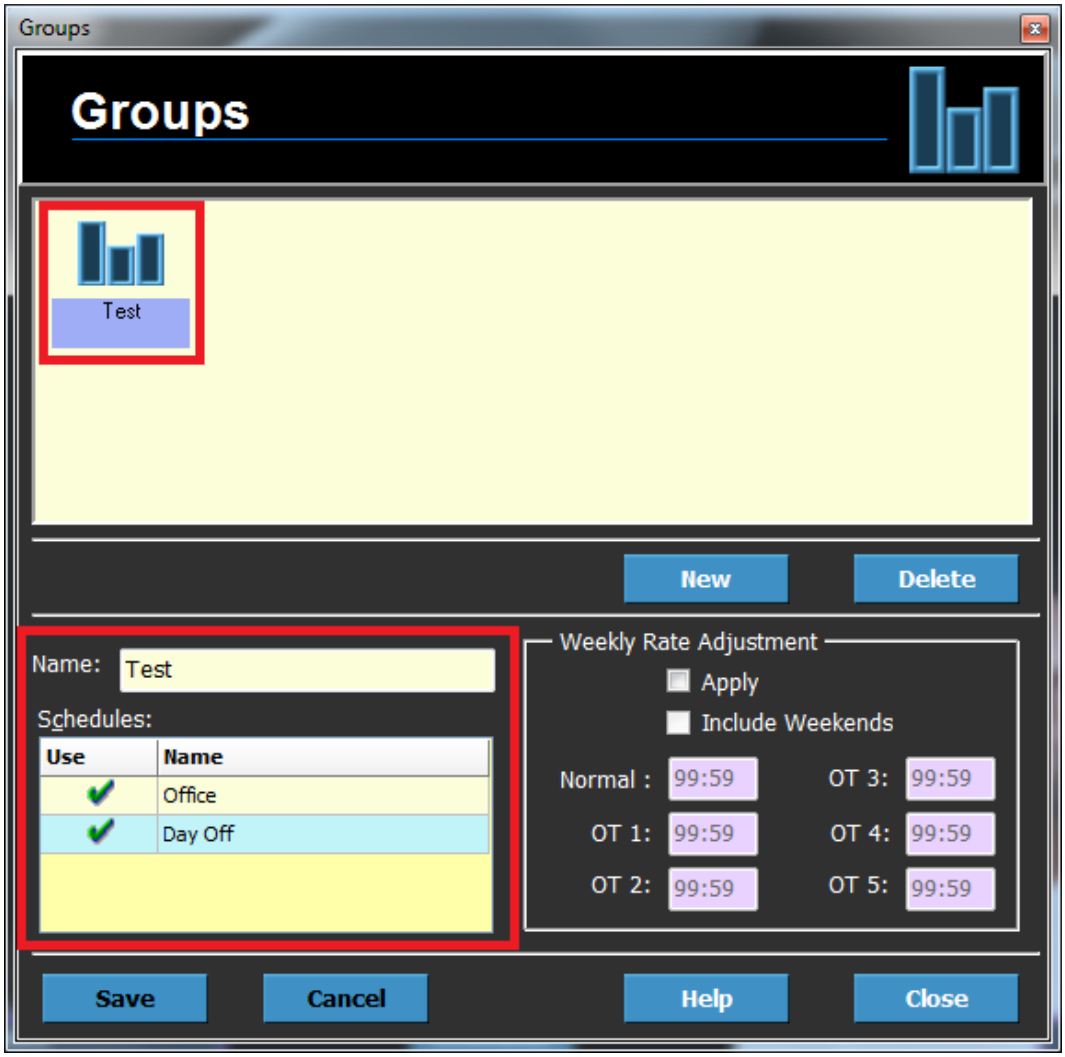
For example: If an employee has to work 40 hours in a week before they can earn overtime, this can be arranged through the weekly overtime rules. It is also possible to specify whether any hours worked at the weekend can be used to make up for any shortfalls in weekday hours.

To set up a new group, click "**New**". Here, you'll be able to name your group and select which shifts you want to be a part of it. You'll be greeted with a list of shifts you created before, as seen below:



To select a shift to be assigned to the group, click the "**Use**" box next to it. You can also change the "**Weekly Rate Adjustment**". If you want to set specific rules for this group (e.g. if you want them to have to work for 40 hours in a week before they can earn 6 hours of overtime), you'd set "**Normal**" to 40:00, then "**OT 1**" to 06:00. You can also specify whether you'd like to include weekends or not.

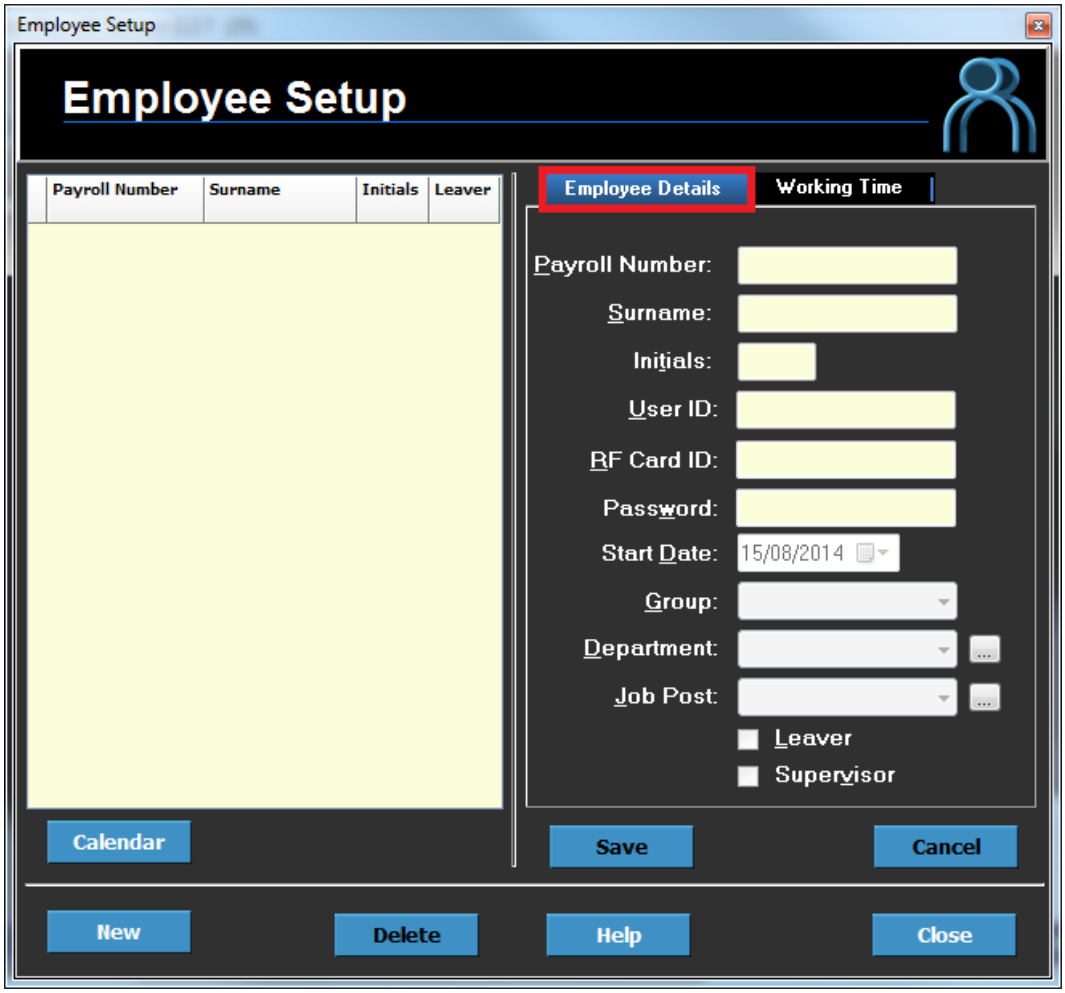
When you're done making changes, click "**Save**". The new group you have assigned will now be shown – clicking on it will show you which schedules are currently assigned to that group.



Employees

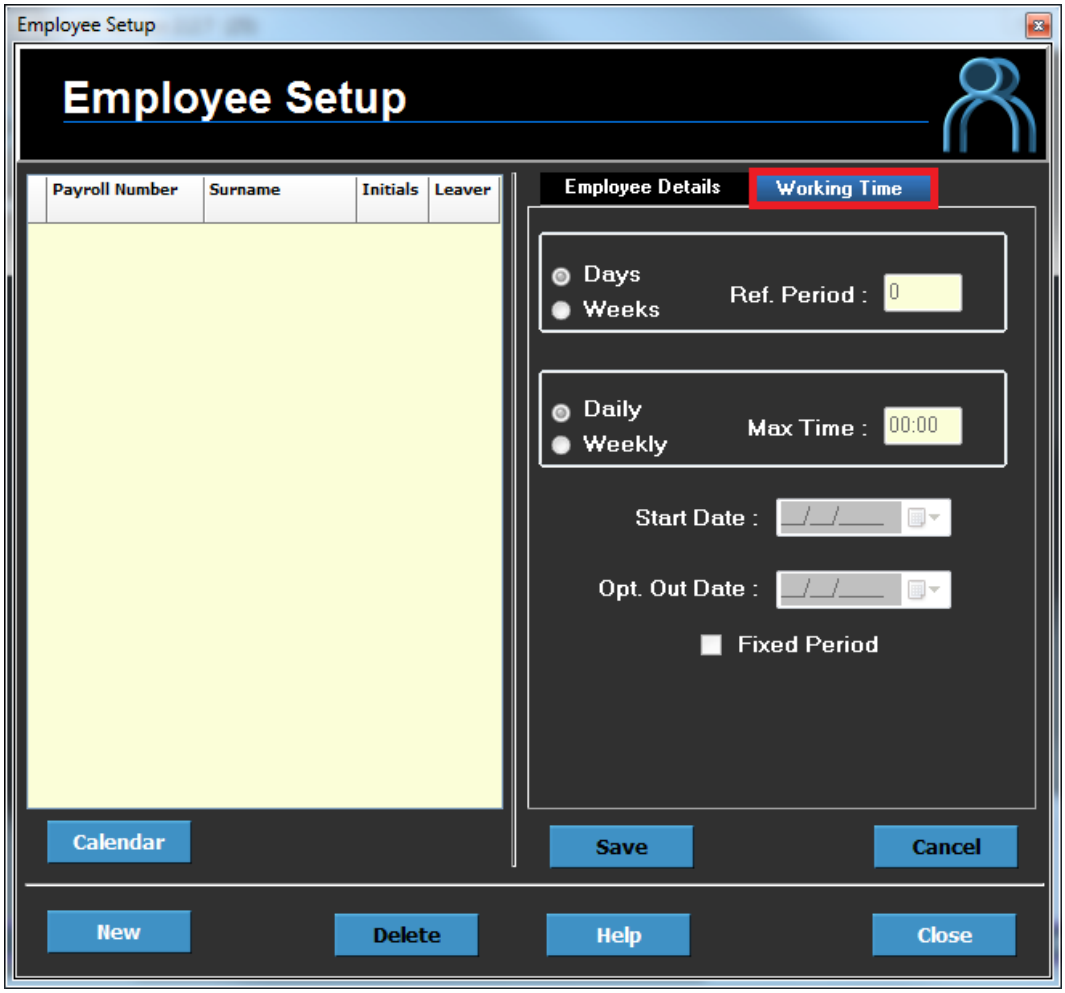
Now that you've configured the shifts and groups for your company, it's time to assign these groups to employees. Start by clicking "**Employees**" from the main menu.

If you need to add a new employee to your database, click "**New**".



Now, you'll need to enter the details of your new employee. You'll notice that this will also enable you to state whether they are a Leaver or a Supervisor. You can also assign the new employee to a group. Clicking the dropdown will present a list of groups you have created.

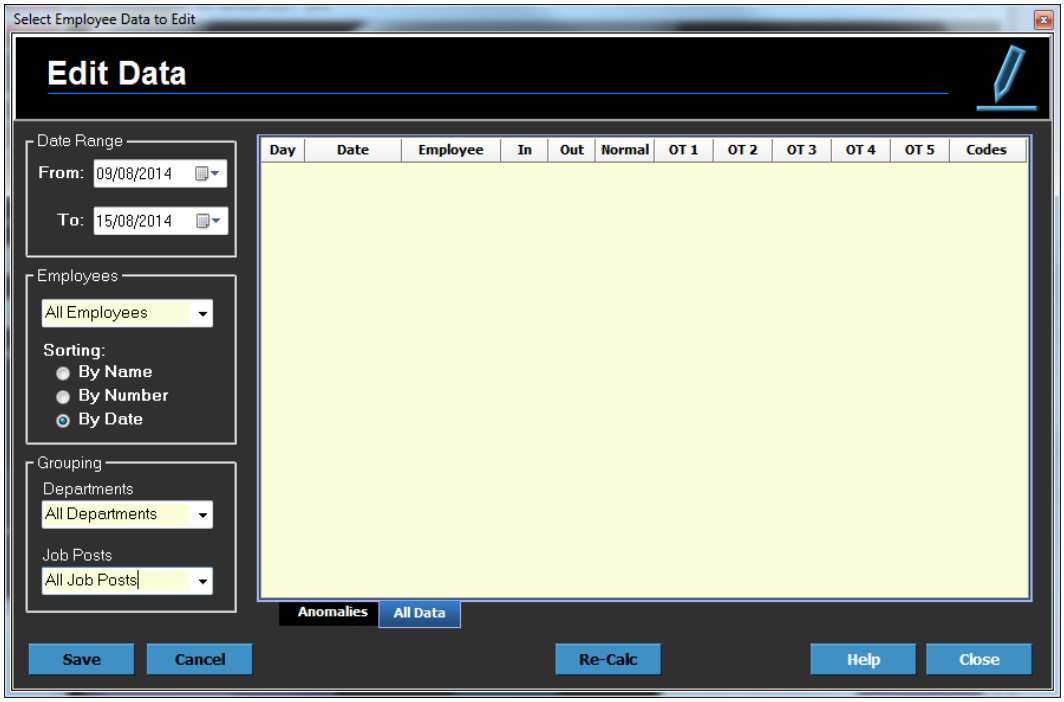
You can also add the employee's "**Working Time**."



This allows you to set the employee's Working Time Directive.

Edit Data

To review the clocking data downloaded from your clocking terminal (and make any necessary changes), click "**Edit**" from the main menu.



This section allows you to view and edit data downloaded from the clocking terminal. You can amend the clocking times and hours worked for a day, and/or change codes used, e.g. **ABS** to **SIC**, or remove a **LAT** code.

By default, this screen will show the last seven days' worth of clocking data, but you can change which dates are shown by using the "**Date Range**" on the left. You can also filter the data further to view a single employee, or group employees shown by Department and/or Job Post.

There are two main pages on this screen: **Anomalies** and **All Data**.

The '**All Data**' page shows all clocking data for the dates/employees selected.

The '**Anomalies**' page will only show days with anomalous clockings (e.g. employees flagged as late, absent, those who haven't clocked out).

If you highlight an anomaly on the 'Anomalies' screen and click "**Accept**", this anomaly will be removed from the Anomalies page. It will, however, still be viewable from the 'All Data' page.

After amending any clocking data, press "**Re-Calc**" and the system will recalculate that selected employee's Normal/Overtime hours for the highlighted day.

Reports

There are six types of reports offered by TimeVision:

- **Absence Report** – This allows you to print a list of absences between two dates for a range of employees. (This will cover four different types of absence – Holiday, Bank Holiday, Sickness and Absence). You are able to specify which type of absence you wish to be printed on the report.

- **Employee List** – This will allow you to print a list of the employees defined in the system. You can print an individual group or all employees.

- **Man Hour Report** – This will allow you to print a list of employees and the total hours worked by each employee.

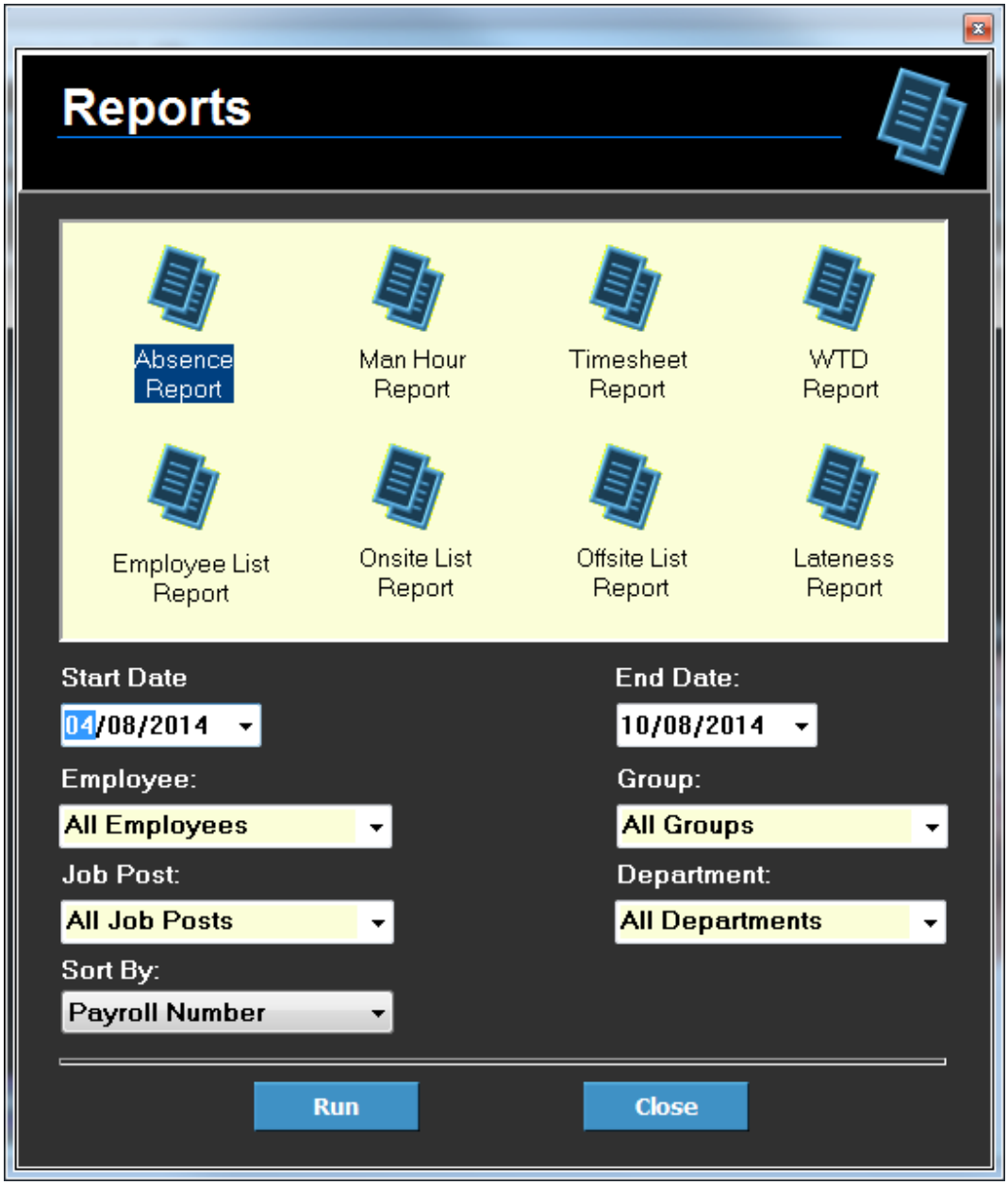
- **Onsite** / **Offsite List** – This will allow you to print a list of all employees who are showing as being onsite or offsite. (***Important: Please note that TimeVision Plus is not a real time system and will only show the status at the time the clocks were downloaded***).

- **Timesheet Report** – This will allow you to print a timesheet for the selected employees. The timesheet will provide a list of the clocking times and hours for each day.

- **Lateness Report** – This will allow you to print a list of lateness's within a specified period.

- **WTD Report** – This will allow you to print a report of the average number of hours an employee has worked as set up on the Working Time Screen.

You can access these reports by clicking the "**Reports**" button from the main menu.



To print a report, you need to select the one you require (by clicking on it) and, if necessary, specify the dates of the report. You can also specify which employees or groups should be included in the report, and can choose how to sort the employees in the report.

When you're ready to print the report, click "**Run**". This will enable you to configure where and how the report should be sent.

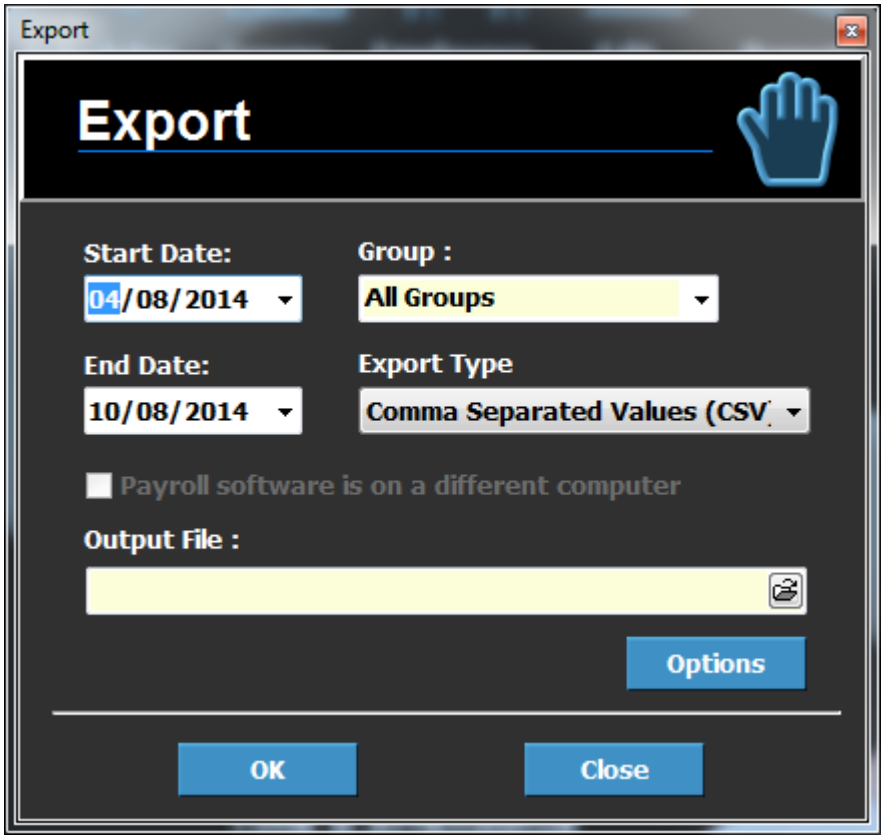
If you want a physical copy of the report, select "**Printer**". This will send it to the selected printer (in this case, the HL-2250DN).

If you want to see what the report will look like before you print or save it, click "**Preview**".

If you want to save the report as a file rather than print a hard copy of it, click "**File**" and choose where you would like the report to be saved, and which format you prefer.

Export

The "**Export**" feature allows you to generate a CSV or Sage payroll file (if you have the Sage payroll software installed). In order to generate one of these files, you need to click "**Export**" from the main menu.



Here, you can specify the dates you wish to include. You can also specify which groups should be involved in the file, and the file type.

If you have successfully installed a **Sage Link**, you will be able to transfer the working hours directly into Sage. (For more information on the optional Sage Link, please contact us.)

You can select where the report should be saved by finding the correct location in "**Output File**".

You will need to give the file a name. When you're done, simply click "**OK**" and the report will be saved to the location you specified with the name you have chosen.

If you have any further questions relating to the use of TimeVision Plus, please don't hesitate to email techsupport@computimeuk.com or call us on 0113 230 2002.