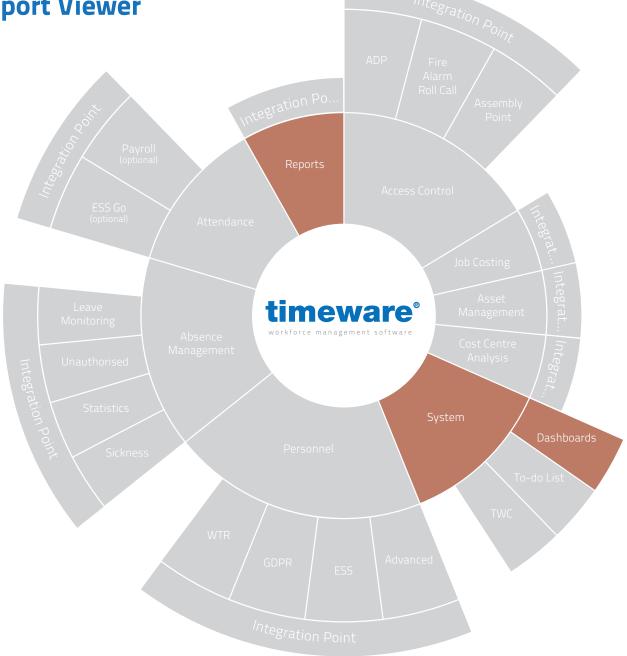


Training guide: Dashboard and Report Viewer



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www.timeware.co.uk support@timeware.co.uk +44 (0) 1706 658222



Contents

Duration Course An Introduction to the Dashboard and Report Viewer Approximately 30 minutes Description Understanding the Dashboard and Report Viewer New Application (External to timeware) Understanding Company and Standard Dashboards and Reports An Introduction to Dashboards Approximately 30 minutes **Understanding Dashboards** Selecting a Dashboard Template Configuring the properties of a Dashboard Running a Dashboard An Introduction to Reports Approximately 30 minutes **Understanding Reports** Selecting a Report Template Configuring the properties of a Report **Running a Report**

All information pertaining to any personnel record within this document is obtained from a demonstration database and are not details of any individual.

Approximately 30 minutes

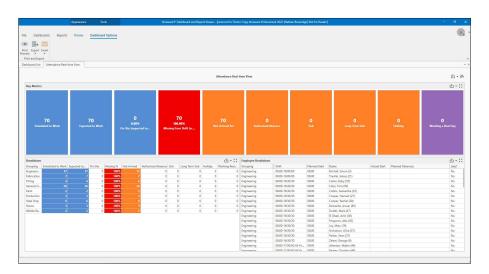
Configuring a roll call report



Understanding the Dashboard and Report Viewer

The Dashboard and Report Viewer is an exciting new module which we've released with the aim of providing the user with as much flexible reporting and information presentation as possible, all the while keeping it easy to use and functional.

With features such as excel reports by default, flexibility to adjust reports to your needs and ease of configuration, the Dashboard and Report Viewer is an excellent addition to timeware® Professional!



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	35 AB Manfactoring Er		Coope, Michael [2]	2 8182357	Sun. 27 Mar 2022 06:00-14:00/14:00-22:00/22:00-06							0.00						
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	37 AB Manfactoring Fi	ttioz	Gibbons, Ronald (20)	20 LVP2572	Mon. 21 Mar 2022 08:00-16:30	08:00	18:15					8.00						
			Gibbons, Ronald (20)		Tue 23 Mar 2022 05:00-16:30	08:00						7:05						

Please note that it is possible for the NMD3® team to develop customised or bespoke dashboards/ reports for your company. Please contact us on +44 (0)1706 659368 to discuss your exact requirements.





New Application (External to timeware®)

The Dashboard and Report Viewer is an entirely different application to timeware. It has been written in the latest .NET code which is where we aim the entire timeware® software to be soon.

There are currently two ways to install the Dashboard and Report Viewer:

 On upgrading to timeware[®] 2022 or greater, the Dashboard and Report Viewer will automatically install alongside timeware[®] and can be accessed via Dashboard and Report Viewer application





Link to New Application (External to timeware®)

 If you have a PC or an interface that does not require the full timeware[®] software but wants to be able access dashboards/reports then there is a separate installation file solely for the Dashboard and Report Viewer. Example of this would be running a dashboard that refreshes every minute on a TV in your reception for First Aiders on site.

The Dashboard and Report Viewer still uses the same user and a password used within the main timeware® application.

ogin	×	
	Version 22.1.5	
	timeware [®]	
	Professional	
	workforce management software	
Domo C	Licensed to Copy timeware Professional 2022 (Nathan Beveridge) Not for Resale	<u>ا</u>
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	Admin	
	Cancel	
	Login Cancel Forgotten password? Click here	





Understanding Company and Standard Dashboards and Reports

timeware® Dashboards and Reports are currently split in to two categories. They are 'Company' and 'Standard'

Company

These Dashboard and Reports are designed with the intent that they do not respect the user permissions set against a user. While this might seem counter to what may be required, its purpose is to allow a user to run for instance a roll call report for everybody at the company, or someone to run a headcount of all staff when their user isn't configured to see everyone in timeware.

For the most part company dashboards and reports will be permissioned out, with only a few select dashboards/reports enabled depending on your requirements.

Category: Company > Absence	
Absence Bradford Factor	
Absence Occurrences	
Category: Company > Attendance	
Attendance Daily Costs	
Attendance Daily Hours	
Attendance Real-time Summary View	
Attendance Real-time View	
Category: Company > Custom	
Job Costing Target	
Job Costing	
Category: Company > Personnel	
Personnel Active Employment	
Personnel Age and Gender	
Personnel Ethnicity and Nationality	
Personnel Headcount by Employment Status	
Personnel Headcount by Grouping	
Personnel Starters and Leavers	
Personnel Training	
Personnel Upcoming Birthdays	

Standard

These are your bread-and-butter dashboards and reports. They are ones that respect your user permissions i.e. you can only see Department A + B in timeware, these dashboards/reports will only ever run for Department A + B

Category: Standard > Absence	
Absence Bradford Factor	
Absence Occurrences	
Category: Standard > Attendance	
Attendance Daily Costs	
Attendance Daily Hours - Copy	
Attendance Daily Hours	
Attendance Real-time Summary View	
Attendance Real-time View	
Job Costing Target	
Job Costing	
Category: Standard > Job Costing	
Job Costing Target	
Job Costing	
Category: Standard > Personnel	
Personnel Active Employment	
Personnel Age and Gender	
Personnel Ethnicity and Nationality	
Personnel Headcount by Employment Status	
Personnel Headcount by Grouping	
Personnel Starters and Leavers	
Personnel Training	
Personnel Upcoming Birthdays	

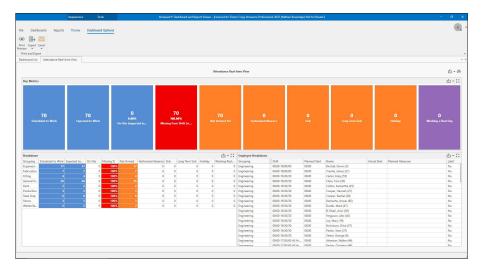


An Introduction to Dashboards

Dashboards are a way to easily display data in a graphical or chart format. They are are set by default to refresh every minute and are perfect for use either on a second monitor or on a TV in the reception.

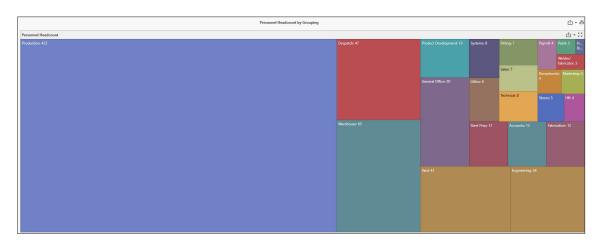
Examples of a few dashboards are:

Attendance Live View – This Dashboard is designed to provide managers with immediate and up to date information on their staff levels





Personnel Headcount by Grouping – A quick and easy way to identify headcounts for various groupings within timeware® such as department, group or manager.





Selecting a Dashboard Template

1. Log in to the timeware® Dashboard and Report Viewer

Login	×
	Version 22.1.5
	timeware
	Professional
	workforce management software
Demo (Licensed to Copy timeware Professional 2022 (Nathan Beveridge) Not for Resale
	Admin
	8
	Login Cancel
	Login Cancel Forgotten password? Click here



2. On the context menu at the top, select Dashboards and then click Dashboard List

		Арр	earance	
File	Dashboards	Reports Th	eme	
E	\$			☆
Dashboard List	Attendance Real-time View	Personnel Active Employment	Personnel Ethnicity and Nationality	Personnel Training
		Favor	rites	

3. You will be presented with two 'columns' which are "Dashboard Templates" and "Chosen Dashboard Templates". The list on the left is all the available dashboards to you.

Appearance Tools	timeware [®] Dashboard and Report Viewer - [Licenced to 'Demo Co
File Dashboards Reports Theme Chosen Templates	
Dashboard List	
Dashboard Templates Drag required templates over to chosen templates.	Search
4 Category: Company > Absence	
Absence Bradford Factor Absence Occurrences	
A Category: Company > Attendance	
Attendance Daily Costs	
Attendance Daily Hours	
Attendance Real-time Summary View	
Attendance Real-time View	
A Category: Company > Custom	
Job Costing Target	
Job Costing	
4 Category: Company > Personnel	
Personnel Active Employment	
Personnel Age and Gender	
Personnel Ethnicity and Nationality	
Personnel Headcount by Employment Status	
Personnel Headcount by Grouping	
Personnel Starters and Leavers	
Personnel Training	
Personnel Upcoming Birthdays	



4. When you find a Dashboard you wish to run, left click on the template and drag it over to the right hand side ('Chosen Dashboard Templates'). You'll notice that the right-hand side of the screen will turn green while you are dragging the dashboard. If you see this, you are doing it correctly and just need to let go of the left click.



5. You now have a dashboard that can be ran and configured

Chosen Dashboard Templates	
	Search
4 Category: Company > Attendance	
Attendance Real-time View 🚖	
4 Category: Company > Personnel	
Personnel Active Employment 🚖	
Personnel Age and Gender	
Personnel Ethnicity and Nationality 🚖	
Personnel Headcount by Grouping	
Personnel Training 🚖	
4 Category: Standard > Attendance	
Attendance Daily Hours	
4 Category: Standard > Custom	
Personnel Headcount by Employment Status	
Personnel Headcount by Grouping	
Personnel Starters and Leavers	
4 Category: Standard > Personnel	
Personnel Ethnicity and Nationality	



Configuring the properties of a Dashboard

1. Highlight the dashboard which you've previously selected in the last step of this tutorial. You'll notice a cog icon. This is the dashboard properties. Click on this to configure the dashboard.

▲ Category: Company > Attendance
Attendance Real-time View ★



- **2.** The First Screen you will be presented with is "Date Range". This is where you can configure the dates for the dashboard. Please note that not all dashboards contain a date range as some don't require them. Ones that do not require them will have "None" in the range.
- **3.** Change the range type dropdown menu to access a variety of date range options and configure to your preference.

白	Today	*
	The present day, time 0:00-23:59.59	
ē	Yesterday On the day preceding today, time 0:00-23:59.59	
	Rolling days The rolling days inclusive of Today, a negative amount can be entered to go backwards exclusive of Today	
Σ	Current pay period Each persons current pay period, weekly, monthly	
Σ	Previous pay period Each persons previous pay period, weekly, monthly	
Σ	Target pay period Each persons pay period by a specified target date	
	Current month The present month, from the 1st to the last day of the month	
	Rolling weeks The rolling weeks inclusive of Today, a negative amount can be entered to go backwards exclusive of Today	
	Previous month The previous month, from the 1st to the last day of the previous month	
	Rolling months The rolling months inclusive of Today, a negative amount can be entered to go backwards exclusive of Today	
	Current year The present year, from the 1st Jan to the 31st Dec 23:59.59	Ŧ



4. The next option on the left-hand side is "Employee Range". This is who you are going to be running the dashboard for. By default its going to show everyone your user can see if running a 'Standard' Dashboard or everyone at the company if running a 'company' Dashboard. You'll notice in the bottom right of the image it says "Count=755". So I know the dashboard is running for 755 employees.

E Menu	🐵 Print Preview 🚔 Print	🗈 Export \star 👅	Email 🔹 🕤 Reset Lay	out				
Date Range								
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	of the grid. Drsg a column header here to					Search		
	Employee	Paylink	Badge	Known As	Employment Status	Vehicle Reg	Vehicle Make	
	Humphries, John #102	MAN2723		HumphriesJohn	Employee			1
	Parkes, Callum #103	BIR4179	103	Parkes.Callum	Employee			12
	Leach, Paige #104	BIR1133	104	Leach, Paige	Employee			1
	Palmer, Callum #105	LVP4783	105	Palmer,Callum	Employee			1
	Simpson, Alex #106	MAN4553	106	Simpson,Alex	Employee			2
	Bell, Evan #107	MAN4889	107	Bell,Evan	Employee			1
		MAN4056	108	Burrows, Molly	Employee			1
	Burrows, Molly #108							1
		AGY109	109	Pawlak, Justyna	Agency			
	Burrows, Molly #108			Pawlak,Justyna Fraser,Jay	Agency Employee			
	Burrows, Molly #108 Pawlak, Justyna #109	AGY109	110					
	Burrows, Molly #108 Pawlak, Justyna #109 Fraser, Jay #110	AGY109 MAN3437	110	Fraser, Jay	Employee			(
	Burrows, Molly #108 Pawlak, Justyna #109 Fraser, Jay #110 Gardiner, Kate #111	AGY109 MAN3437 BIR4945	110	Fraser, Jay Gardiner, Kate	Employee Employee		Count=	0

5. To narrow down the employees, firstly highlight the setting you wish to filter by. In my example I'm going to say I don't want to see leavers. I highlight over the "Employment Status" and it prompts me with a little Pin Icon.

Drag a column header here to	group by that column				Sea
Employee	Paylink	Badge	Known As	Employment Stat	Vehi
Humphries, John #102	MAN2723	102	Humphries, John	Employee	Narro
Parkes Callum #103	BIR4179	103	Parkes Callum	Employee	



6. Click on the pin icon and it will present you with a way to select which options you want to show. In my example I only want to see employees

Employment Stat		Maka
Employee	Filter Rules Filter Values	
Employee	Search	
Employee		
Employee	(AII)	(755)
Employee	Employee (658)	
Employee	Leaver (5)	
Employee	Employee (part time) (28)	
Employee	Agency (04)	
Employee		
Employee		
Employee		
	Clear Filter	

7. Once selected you'll notice that the count in the bottom right of the screen will have changed based off what you selected.

Count=658

8. You can change as many properties as you require to narrow down your employee range and tailor it to how you require. Once you are happy with your selection, click on Save



Running a Dashboard

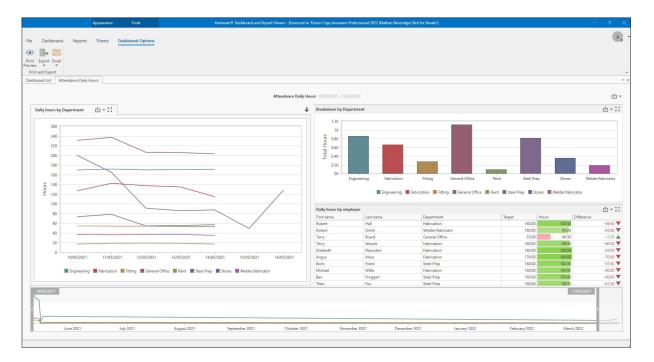
1. Once the properties have been configured as per the previous section of this tutorial, you can either double click on the row of the dashboard or you can press the play button when highlighting it

A Category: Standard > Attendance
Attendance Daily Hours



Link to Running a Dashboard

2. You've just ran a dashboard!





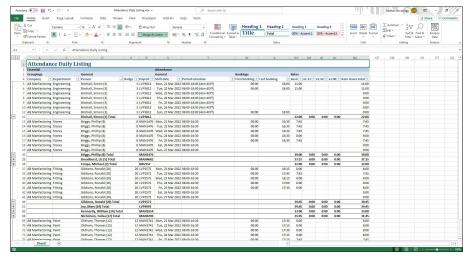
An Introduction to Reports

Our reports have been designed with three things in mind: Flexibility, Ease of Use and Excel by Default. With these core design principles in mind, we've developed a module that should help to make the user experience leaps and bounds better than our previous reporting module.

The vast majority of our customers from our experience prefer excel reports by default so we designed this module around that. It still also retains an option for exporting to PDF if the user requires.

Examples of a few of our reports are:

Attendance Daily Listing – Bread-and-butter attendance report to break down the hours for employees based on a daily level.



Absence Listing – Easily identify absences on the system i.e. holidays, sickness etc.

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Essential		,	Attendance Adjustment	its														
General			Absence															
Employee I	D 🗉 First Name	* Last Name *	Policy -	Absence from *	bsence to 💌 Ent	tlement deduction	Absence categor	y - Absence type	· Authorisation	status 💌 Authorised by	Authorisation final	ised -						
	1 Dave	Webb	Production Employee	08/02/2021	12/02/2021		5 Holiday		ay Approved	user	Yes							
	1 Dave	Webb	Production Employee	14/02/2022	18/02/2022		5 Holiday	Holiday Full 6	ay Approved	Admin	Yes							
	1 Dave	Webb	Production Employee	24/05/2022	24/05/2022		Holiday		ay Approved	Admin	Yes							
	1 Dave	Webb	Production Employee	25/05/2021	25/05/2021		L Holiday	Holiday Full 0	ay Approved	Admin	Yes							
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	2 Michael	Coope	Production Employee	26/04/2021	26/04/2021		L Holiday		ay Approved	user	Yes							
	2 Michael	Coope	Production Employee	28/12/2021	28/12/2021		Holiday		ay Approved	Admin	Yes							
	4 Matt	Wilkinson	Production Employee	28/12/2021	28/12/2021		L Holiday		ay Approved	Admin	Yes							
	4 Matt	Wikinson	Production Employee	19/04/2021	23/04/2021		5 Holiday		ay Approved	user	Yes							
	5 Liz	Broadhurst	Salaried Paid Employee		28/12/2021		L Holiday		ay Approved	Admin	Yes							
	5 Liz	Broadhurst	Salaried Paid Employee		21/12/2021		Holiday	Holiday Full 0		Admin	Yes							
	6 George	Zelem	Salaried Paid Employee		05/08/2021		5 Holiday		ay Approved	Admin	Yes							
	6 George	Zelem	Salaried Paid Employee		13/06/2021		5 Holiday		ay Approved	Admin	Yes							
	6 George	Zelem	Salaried Paid Employee		28/12/2021		Holiday		ay Approved	Admin	Yes							
	7 Lesley	Wilkinson	Salaried Paid Employee		11/06/2021		5 Holiday		ay Approved	user Admin	Yes							
	7 Lesley 7 Lesley	Wilkinson	Salaried Paid Employee Salaried Paid Employee		28/12/2021 08/10/2021		Holiday Holiday	Holiday Full C	ay Approved	admin	Yes							
	8 Phillip									Admin	Yes							
	8 Phillip	Briggs	Production Employee Production Employee	28/12/2021 21/06/2021	28/12/2021 25/06/2021		t Holiday 5 Holiday		ay Approved ay Approved	Admin	Yes							
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	8 Phillip	Briggs	Production Employee	20/08/2021	20/08/2021		Holiday		ay Approved	Admin	Yes							
	8 Phillip	Briggs	Production Employee Production Employee	24/08/2021	27/08/2021		Holiday		ay Approved av Approved	Admin	Yes							
	12 Thomas	Oldham	Production Employee	05/07/2021	09/07/2021		5 Holiday		ay Approved	Admin	Yes							
	12 Thomas	Oldham	Production Employee	12/07/2021	16/07/2021		5 Holiday		ay Approved	Admin	Yes							
	12 Thomas	Oldham	Production Employee	05/09/2021	10/09/2021		Holiday	Holiday Full C		Admin	Yes							
	12 Thomas	Oldham	Production Employee	28/12/2021	28/12/2021		L Holiday		ay Approved	Admin	Yes							
	13 Gerose	Price	Salaried Paid Employee		14/05/2021		Holiday	Holiday Full 0		Admin	Yes							
	13 Gerope	Price	Salaried Paid Employee		13/08/2021		Holiday	Holiday Full (Admin	Yes							
	13 Gerose	Dvine	Salaried Paid Employee		27/12/2021		Holiday	Holiday Full (Admin	Yes							





Selecting a Report Template

1. Log in to the timeware® Dashboard and Report Viewer

Login	×
	Version 22.1.5
	timeware [•]
	Professional
	workforce management software
Demo	Licensed to Copy timeware Professional 2022 (Nathan Beveridge) Not for Resale
	Admin
	Admin
	Admin



2. On the context menu at the top, select Reports and then click Report List

			Appearance	Tools
File	Dashboards	Reports	Theme	Chosen Templates
Report			nent Personnel	
List	Listing Daily	Listing Listi Favourites	ng Listing	
Dashb	oard List Re	port List		

3. You will be presented with two 'columns' which are "Report Templates" and "Chosen Reports Templates". The list on the left is all the available reports to you.

	Appearance	fools	timeware [®] Dashboard and Report Viewer - [Licenced to 'Demo
File Dashboards Reports	Theme Chose	Templates	
Report Listing Daily Listing Listi Favourites	ment Personnel ing Listing		
Dashboard List Report List			
Report Templates Drag required templates over to cho	osen templates.		
			Search
+ Category: Bespoke			
4 Category: Company > Absen	ice		
Absence Entitlement Listing			
Absence Listing			
Absence Reason Listing			
Bradford Factor Listing			
Holiday Accrual Listing			
4 Category: Company > Access	s Control		
Access Event Listing			
A Category: Company > Attend	dance		
Anomalies Listing			
Attendance Daily Listing			
Attendance Daily Summary Lis	sting		
Attendance Daily with Costs L	isting		
Attendance Flexitime Listing			
Attendance Flexitime Summar	ry Listing		
Attendance Flexitime with Cos	sts Listing		
Attendance Period Listing			
Attendance Period Summary I	Listing		
Attendance Period with Costs	Listing		
Daily Schedule Analysis Listing	9		
Employees Missing from Daily	Schedule Listing		
Static Register Listing			
Weekly Clock Card			



4. When you find a Report you wish to run, left click on the template and drag it over to the right hand side ('Chosen Reports Templates'). You'll notice that the right-hand side of the screen will turn green while you are dragging the Report. If you see this, you are doing it correctly and just need to let go of the left click.



5. You now have a Report that can be ran and configured

Chosen Report Templates	
	Search
4 Category: Company > Absence	
Absence Listing 🚖	
Bradford Factor Listing	
A Category: Company > Attendance	
Attendance Daily Listing 🚖	
Category: Company > Dashboard Companion > Working Time Regulations	
WTR Overview	
Category: Company > Personnel	
Disciplinary Listing	
Document Listing 🚖	
Employment Listing	
Personnel Listing	
Category: Standard > Personnel	
Personnel Listing 🚖	



Configuring the properties of a Report

1. Highlight the Report which you've previously selected in the last step of this tutorial. You'll notice a cog icon. This is the Report properties. Click on this to configure the Report.

4 Category: Standard > Personnel	
Personnel Listing 🚖	

2. The First Screen you will be presented with is "Date Range". This is where you can configure the dates for the report. Please note that not all reports contain a date range as some don't require them. Ones that do not require them will have "None" in the range.

Change the range type dropdown menu to access a variety of date range options and configure to your preference.

白	Today	*
	The present day, time 0:00-23:59.59	1
ē	Yesterday On the day preceding today, time 0:00-23:59.59	
	Rolling days The rolling days inclusive of Today, a negative amount can be entered to go backwards exclusive of Today	
Σ	Current pay period Each persons current pay period, weekly, monthly	
Σ	Previous pay period Each persons previous pay period, weekly, monthly	
Σ	Target pay period Each persons pay period by a specified target date	
	Current month The present month, from the 1st to the last day of the month	
	Rolling weeks The rolling weeks inclusive of Today, a negative amount can be entered to go backwards exclusive of Today	
	Previous month The previous month, from the 1st to the last day of the previous month	
	Rolling months The rolling months inclusive of Today, a negative amount can be entered to go backwards exclusive of Today	
	Current year The present year, from the 1st Jan to the 31st Dec 23:59.59	-





3. The next option on the left-hand side is "Employee Range". This is who you are going to be running the report for. By default, it is going to show everyone your user can see if running a 'Standard' Report or everyone at the company if running a 'company' Report. You'll notice in the bottom right of the image it says "Count=755". With that value in mind, I know the report is running for 755 employees.

vanie.	Personnel Listing								
	Menu	💿 Print Preview 🖶 Print	🕞 Export 👻 🔤	Email 🔹 🌖 Reset Lay	out				,
Ê	Date Range		`						
È	Employee Range	Employee F Employee range ho	0	formation that affe	cts the running o	of your report	ts.		
Ê	Sort Order			ick on the appropriate co ' column header filter wit					of
٦	Appearance	the grid.							
		Drag a column header here to	group by that column				Search		
		Employee	Paylink	Badge	Employment Status	Vehicle Reg	Vehicle Make	Period Schedule	Abs
		Humphries, John #102	MAN2723		Employee			06:00-14:00\14:00	Pro
		Parkes, Callum #103	BIR4179		Employee			22:00-06:00	Pro
		Leach, Paige #104	BIR1133	104	Employee			06:00-14:00\14:00	Pro
		Palmer, Callum #105	LVP4783	105	Employee			06:00-14:00\14:00	Pro
		Simpson, Alex #106	MAN4553	106	Employee			22:00-06:00	Pro
		Bell, Evan #107	MAN4889	107	Employee			06:00-14:00\14:00	Pro
		Burrows, Molly #108	MAN4056	108	Employee			06:00-14:00\14:00	Pro
		Pawlak, Justyna #109	AGY109	109	Agency			22:00-06:00	Sa
		Fraser, Jay #110	MAN3437	110	Employee			08:00-16:30	Pn
		Gardiner, Kate #111	BIR4945	111	Employee			08:00-16:30	Pn
		Wright, Georgina #112	LVP3453		Employee			06:00-14:00\14:00	Pn
		Robinson, Mason #113	MAN1217	113	Employee			06:00-14:00\14:00	Pn
		Olszewski, Grzegorz #114	AGY114	114	Agency			06:00-14:00\14:00	Pro
		Rose, Isaac #115	MAN1917	115	Employee			22:00-06:00	Pro
		Quinn, Alice #116	BIR1543	116	Employee			06:00-14:00\14:00	Pro
		Conway Samuel #117	MAN3130	117	Employee			22:00-06:00	Pre
								Count=7	55
									×

4. To narrow down the employees, firstly highlight the setting you wish to filter by. In my example I'm going to say I don't want to see leavers. I highlight over the "Employment Status" and it prompts me with a little Pin Icon.

Drag a column header here to	group by that column				Sea
Employee	Paylink	Badge	Known As	Employment Stat 9	Vehi
Humphries, John #102	MAN2723	102	Humphries, John	Employee	Narro
Parkes Callum #103	BIR4179	103	Parkes Callum	Employee	



5. Click on the pin icon and it will present you with a way to select which options you want to show. In my example I only want to see employees so I tick just employees. You can tick as many as you require !

Employment Stat	Less and the second	iclo Mako			
Employee	Filter Rules Filter Values				
Employee	Search				
Employee					
Employee	(AII)	(755)			
Employee	Employee (658)				
Employee	Leaver (5)				
Employee	Employee (part time) (28)				
Employee	Agency (64)				
Employee					
Employee					
Employee					
	Clear Filter				

6. Once selected you'll notice that the count in the bottom right of the screen will have changed based off what you selected.

Count=658



7. You can change as many properties as you require to narrow down your employee range and tailor it to how you require. All the 'Headers' on the employee range page contain a Pin icon where you can narrow the range down.

Employee	Paylink	Badge	Employment Status	Vehicle Reg	Vehicle Make	Period Schedule	Abca
Humphries, John #102	MAN2723	102	Employee			06:00-14:00\14:0	Filter Rules Filter Values
Parkes, Callum #103	BIR4179	103	Employee			22:00-06:00	Search
Leach, Paige #104	BIR1133	104	Employee			06:00-1 <mark>4:0</mark> 0\14:0	
Palmer, Callum #105	LVP4783	105	Employee			06:00-14:00\14:0	(All) (755
Simpson, Alex #106	MAN4553	106	Employee			22:00-06:00	08:00-16:30 (234)
Bell, Evan #107	MAN4889	107	Employee			06:00-14:00\14:0	06:00-14:00\14:00-22:00\22:00-0 (264 22:00-06:00 (227)
Burrows, Molly #108	MAN4056	108	Employee			06:00-14:00\14:0	06:00-18:00 (4on 4Off) (15)
Pawlak, Justyna #109	AGY109	109	Agency			22:00-06:00	09:00-17:00 (No Overtime) (15)
Fraser, Jay #110	MAN3437	110	Employee			08:00-16:30	
Gardiner, Kate #111	BIR4945	111	Employee			08:00-16:30	
Wright, Georgina #112	LVP3453	112	Employee			06:00-14:00\14:0	
Robinson, Mason #113	MAN1217	113	Employee			06:00-14:00\14:0	
Olszewski, Grzegorz #114	AGY114	114	Agency			06:00-14:00\14:0	
Rose, Isaac #115	MAN1917	115	Employee			22:00-06:00	Clear Filter
Duting Alter #110	PID1542	110	Executioners			05.00 14.00 14.00	D. D. C. H.

8. The next option on the left hand side is "Sort Order". This can be used to group employees on your reports, for example by department. The order that it will group employees is from the top option downwards, so my example will group by departments, then by the person.

me: Personnel Listing				
E Menu				
Date Range	Sort Order Sort order holds imp	ortant informat	ion that affe	cts the running of your repo
Employee Range				
	Sort Order			•
	Sort Order Select order by: Department	⊗ -	Ascending	-
Sort Order		© •		•
Sort Order	Select order by: Department		Ascending	-
Sort Order	Select order by: Department Select then by: Person	⊗ -	Ascending ·	-



9. The next option to adjust is the "Appearance". This is where the reports come in to their own. By default we've taken the approach that reports should be minimal on what they display, with the option for the user to select or deselect what features they do not want to appear on the reports. You'll notice that by default the Personnel Listing report only comes with "Person" and "Payroll", and when the report is ran that is the only data that shows.

Report P	roperties		
Name:	Personnel Listing		
=	Menu		
Ê	Date Range	Appearance Appearance holds important information that affect	ts the running of your reports.
â	Employee Range		
È	Sort Order	Appearance	•
	Solt Order	Show columns: Person 🕲 Payroll 🕲	•
Ê	Appearance	Select options: Display the report title 🔇 Display column categories 🔇	•

	0	R
1	Personnel Listing	
2	Essential	
3	General	
4	Person 🔎	Payroll 💌
5	Adamczyk, Agnieszka (370)	AGY370
6	Adamczyk, Artur (675)	AGY675
7	Adams, Ewan (741)	BIR3506
8	Adamska, Krystyna (691)	AGY691
9	Adamski, Olaf (253)	MAN2208
10	Ahmed, Mason (465)	MAN1838



10. You can click on the dropdown and you'll be presented with various options you can tick. Ticking an option will make that appear on the report. In my example I want to select department, employee ID, work email, date of commencement and Terminal Policy

Ticking these options will add them as options to the show columns area as per the image below. If you want to remove any, untick them.

Show columns:	Person & Payroll & Department & Employee ID & Work Email & Date of Commencement & Terminal Policy &	+
Select options:	 Sector Pay Type Line Manager Grouping 07 Grouping 08 Grouping 10 ✓ Employee ID First Name Last Name ✓ Person 	
	Facility Code OK Cancel	Ŧ

11. Once you are happy with the report properties, click Save in the bottom right.

2	
Save	Cancel



Running a Report

1. Once the properties have been configured as per the previous section of this tutorial, you can either double click on the row of the report for it to run in excel format or you can press the green excel button when highlighted. Alternatively, you can press the PDF icon to run the report as a PDF.

Category: Standard > Personnel
Personnel Listing



2. You've just ran a report!

Z C	L	0	R	V	X	AB
Personne	lListing					
Essential						
Groupings	General					
4 Department	Employee ID	Person	-1 Payroll *	Work Email	Date of Commenceme	ent - Terminal Policy
5 Production	Annual Contract of the Contrac	Adamczyk, Agnieszka (370)	AGY370	Agnieszka.Adamczyk@notused.com	Research Control of Co	2013 Factory Employees
5 Yard		5 Adamczyk, Artur (675)	AGY675	Artur.Adamczyk@notused.com		2021 Factory Employees
7 Production		L Adams, Ewan (741)	BIR3506	Ewan.Adams@notused.com		1995 Factory Employees
B Health & Safety		L Adamska, Krystyna (691)	AGY691	Krystyna.Adamska@notused.com		2004 Office Access Mon to Fri O
9 Warehouse		Adamski, Olaf (253)	MAN2208	Olaf.Adamski@notused.com	Wed, 8 May	2013 Factory Employees
0 Warehouse	465	Ahmed, Mason (465)	MAN1838	Mason.Ahmed@notused.com	Sat, 28 Jul	2018 Factory Employees
1 Production	44:	Akhtar, Owen (441)	MAN1361	Owen.Akhtar@notused.com	Fri, 22 Sep	2017 Factory Employees
2 Production	29	7 Alexander, Alfie (297)	MAN3498	Alfie.Alexander@notused.com	Thu, 17 May	2018 Factory Employees
3 Production	25:	L Ali, Sam (251)	MAN4666	Sam.Ali@notused.com	Fri, 9 Aug	2019 Factory Employees
4 Production	34:	Allan, Danielle (341)	AGY341	Danielle.Allan@notused.com	Wed, 1 Jun	2011 Factory Employees
5 Warehouse	20:	L Allen, Dave (201)	LVP1680	Dave.Allen@notused.com	Thu, 11 Feb	2021 Office Access Mon to Fri O
6 Production	225	5 Allen, Ellis (225)	BIR1104	Ellis.Allen@notused.com	Wed, 17 Jul	1991 Factory Employees
7 General Office	7:	Allen, Lawrence (71)	BIR3791	Lawrence.Allen@notused.com	Mon, 22 Jan	2007 Factory Employees
8 Production	680	5 Anderson, Archie (686)	MAN3989	Archie.Anderson@notused.com	Tue, 27 Nov	2001 Factory Employees
9 Production	15:	Anderson, Jack (151)	BIR1534	Jack.Anderson@notused.com	Fri, 26 Aug	1988 Factory Employees
0 Production	504	Andrews, Jamie (504)	MAN3472	Jamie.Andrews@notused.com	Fri, 8 Jan	1999 Factory Employees
Production	580	Archer, Elliot (580)	BIR1956	Elliot.Archer@notused.com	Sat, 26 Mar	1994 Factory Employees
2 Production	623	Armstrong, Louie (622)	BIR2840	Louie.Armstrong@notused.com	Sun, 12 Jun	2016 Factory Employees
23 Production	385	5 Arnold, Joe (385)	BIR4501	Joe.Arnold@notused.com	Sun, 10 Aug	2014 Factory Employees
4 Warehouse	205	5 Ashton, Emma (205)	LVP4251	Emma.Ashton@notused.com	Sat, 17 Jul	1999 Factory Employees
5 Engineering	44	Atherton, Walter (44)	MAN3957	Walter.Atherton@notused.com	Tue, 23 Jan	2007 Office Access Mon to Fri O
6 Production	495	5 Atkins, Kian (495)	BIR2467	Kian.Atkins@notused.com	Sun, 13 Apr	1997 Factory Employees
7 Production	360	Atkinson, Zachary (360)	BIR2423	Zachary.Atkinson@notused.com	Fri, 25 Dec	2015 Factory Employees
8 Production	730	5 Austin, Bailey (736)	BIR3794	Bailey.Austin@notused.com	Wed, 5 May	1999 Factory Employees
9 Production	595	5 Bailey, Craig (595)	MAN1593	Craig.Bailey@notused.com	Thu, 30 Nov	2006 Factory Employees
0 Warehouse	374	Bailey, Harley (374)	BIR2300	Harley.Bailey@notused.com	Sat, 5 Mar	2011 Factory Employees
1 Production	129	Bailey, Molly (129)	BIR2288	Molly.Bailey@notused.com	Mon, 15 Aug	1988 Factory Employees
2 Production	283	Baker, Jodie (283)	BIR3460	Jodie.Baker@notused.com	Sat, 12 Apr	2014 Factory Employees
3 General Office	73	Baker, Tia (73)	MAN3115	Tia.Baker@notused.com	Wed, 24 Jan	2007 Factory Employees
4 General Office	74	4 Baker, Valentina (74)	MAN1254	Valentina.Baker@notused.com	Thu, 25 Jan	2007 Factory Employees
5 Production	740	Baldwin, Freddie (740)	BIR4952	Freddie.Baldwin@notused.com	Sun, 10 Feb	2013 Factory Employees
6 Production	150) Ball, Isaac (150)	BIR3446	Isaac.Ball@notused.com	Fri, 1 Aug	2003 Factory Employees
7 General Office	85	Ballson, Aaron (89)	MAN4012	Aaron.Ballson@notused.com	Fri, 26 Jan	2007 Factory Employees
8 General Office	8	Banks Ronnie (82)	MAN1162	Ronnie Banks@notused.com	Sat 27 Ian	2007 Factory Employees



Configuring a roll call report

The roll call report can provide your company with an up to date and accurate view of employees currently clocked "On-Site" at your company. This can be of great benefit to many a customer and can be emailed automatically in the event of a fire in conjunction with a timeware Fire Alarm Monitor.

1. We will be selecting, configuring, and running the report using all the methods outlined in previous sections of this module. The report to use is called Roll Call Listing found in the Roll Call template section.

Tools	
hosen Templates	
int Print Export Email	
Report Templates Drag required templates over to chosen templates.	Chosen Report Templates
Search	Search
A Category: Company > Personnel	4 Category: Company > Personnel
Medical Review Listing	Accident or Injury Listing
Period of Service Listing	Email Agent TestPersonnel Listing
Personnel Listing	Employment Listing
Personnel With Sensitive Data Listing	Personnel Listing
Right to Work Listing	Personnel With Sensitive Data Listing
Training and Qualification Listing	A Category: Company > Roll Call
Training and Qualification Matrix	Roll Call Listing
Vehicle Mileage Listing	
A Category: Company > Planner	✓ Category: Personnel
Planner Listing	Personnel Listing
	Personnel Listing - Fabrication
A Category: Company > Roll Call	A Category: Standard > Access Control
Roll Call Listing	Access Event Listing
A Category: Standard > Absence	4 Category: Standard > Attendance



2. Report configuration for the Roll Call Listing is outlined in the Configuring the properties of a report section.



3. Once you are happy with the properties, you can run the report. When the report runs, a menu will appear. This is where you can select which devices you want to take the roll call from. Select the devices you require and then press Next.

Roll Call Listing - Report Range	
Terminals Select terminals you wish to include within your report. Include terminals that no longer exist GPS Employee Self Service 12 N2 N2	Select all Deselect all
	Next > Cancel

4. You will be presented with a list of Zones which may differ based on company. Most roll call reports are to alert customers to who is On-Site/in the building, in which case the IN zone can be used. If you want all employees regardless of where they are to appear, select them all. Press Apply.