

Manual

Safescan Workforce Planner



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1 Introduction

Safescan Workforce Planner is software for recording and planning time for collecting, processing and planning staff time.

Plan your staff and time efficiently and accurately according to the requirements. Using the integrated calendar tool, you can schedule shifts, absence and availability requirements. The operational plans which were previously drawn up on paper can be easily included, edited and of course printed, using the planning interface of your Safescan Workforce Planner system.

Thanks to the flexible system architecture, Safescan Workforce Planner can be used for small to medium sized operations in virtually any industry and meets the requirements for a powerful time evaluation tool. Safescan Workforce Planner supports all Safescan time attendance recording device. As all device types have their own specifications, the software functions described may possibly not be used with all Safescan time attendance device. Details about the features can be found in the information which comes with the Safescan time attendance device, but you can also contact your supplier. This manual describes the installation, functionality and application of the Safescan Workforce Planner software package. When using earlier software versions, there may be differences in the description of the functions. No specialized knowledge of computer technology is required to use the software. Familiarity with the graphic interface of Microsoft Windows is, however, a prerequisite. These instructions are no substitute for the necessary instruction and training on the system and merely serve as a reference. Safescan Workforce Planner was developed with great care and tested to comply with the latest advances in technology. If you have suggestions for improving the program or if you come across any errors in the software or the operating instructions, please let us know.

2 Summary of the manual

The user manual gives you an overview of the handling of Safescan Workforce Planner and contains steps for frequently used operations. The screenshots shown are examples rather than specifications.

2.1 Using the user manual

This user manual discusses mouse operation. "Click" always refers to pressing the left mouse button. If any rows are highlighted, this indicates that the left mouse button is being used to click on the entry. Other operating steps, such as working with the right mouse button, are described specifically.

2.2 System requirements

To use Safescan Workforce Planner, your PC should meet the following requirements:

- Pentium IV processor or higher
- Main memory of at least 1024 MB
- USB and TCP/IP ports
- Free hard disk capacity of at least 100 MB
- CD-ROM drive
- Resolution of at least 1024 x 768 (1280 x 1024 is recommended)
- Windows XP operating system or higher

2.3 Explanation of symbols



Clock times in a grid overview



Planning module for shift and vacation planning



Send current views or reports by email



Filter



Download the schedule data from a TA 655



Synchronisation of the user data



Print the configured overview



Export data



Send views or reports by email



Print the view



Add plan



Edit plan



Clear plan



Update data



Switch to list view



Switch to grid view



Import national holidays



Open and close the template list



Open and close the work code legend in planning



Print the weekly work schedules



Save



Undo



Search for new hardware



Time setting on the device



Retreiving USB stick



Connection interrupted



Connection made

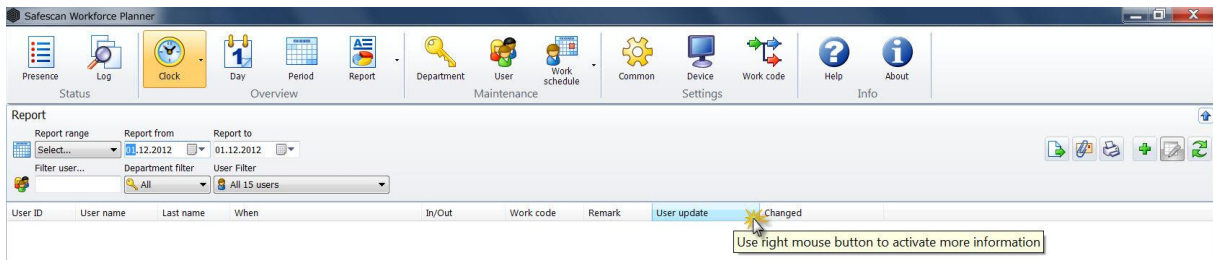



Close the application

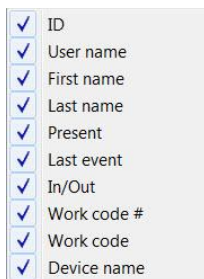


Work schedule on / off

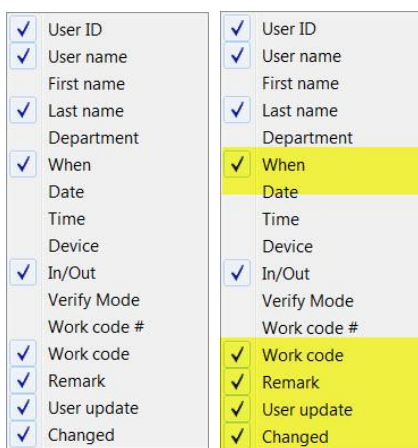
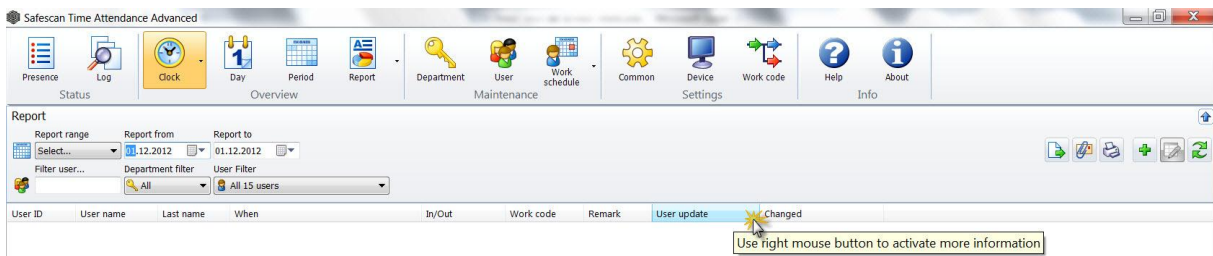
2.4 Set title bar

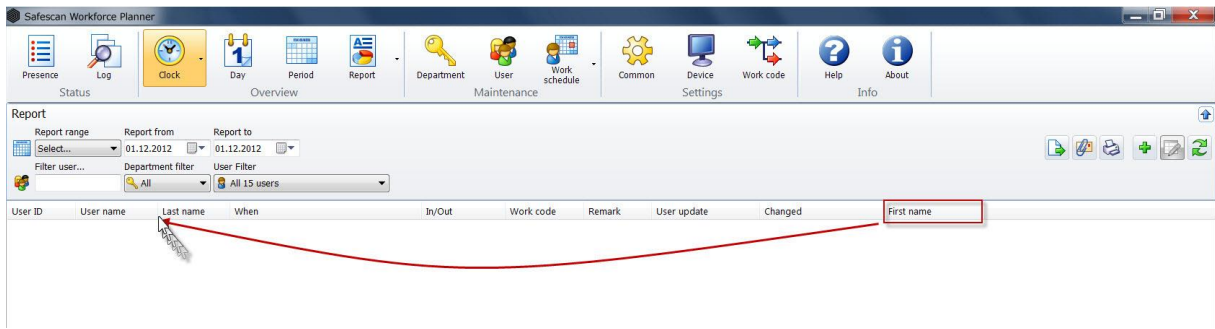


If you click on the title bar with the right mouse button, you get a list of all possible columns in the current view that can be clicked on or off. The activated columns are indicated with  .



Any added columns will be attached to the **end** of the title bar in the display. All columns can be dragged to the desired location with the mouse (drag & drop). The settings are accepted by the system and stored. This means you can set up your own personal workspace.



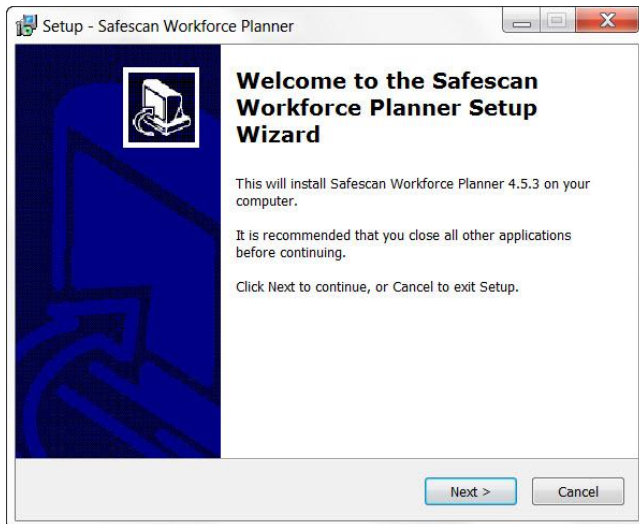


Note: The layout is individually customised to your workplace and will not be displayed to any other users.

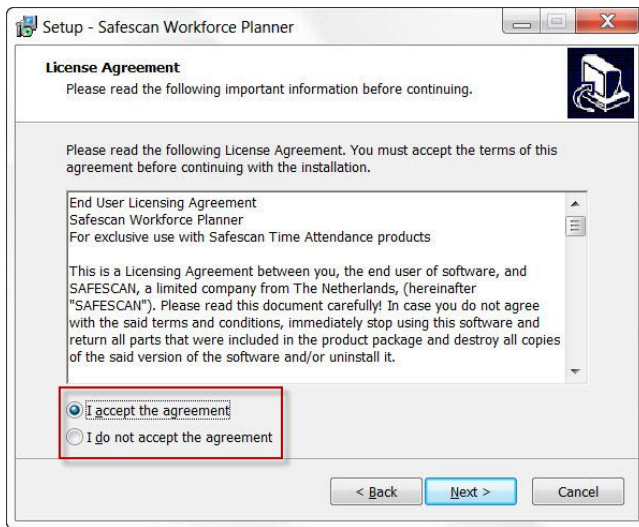
3 Installation

3.1 Program installation

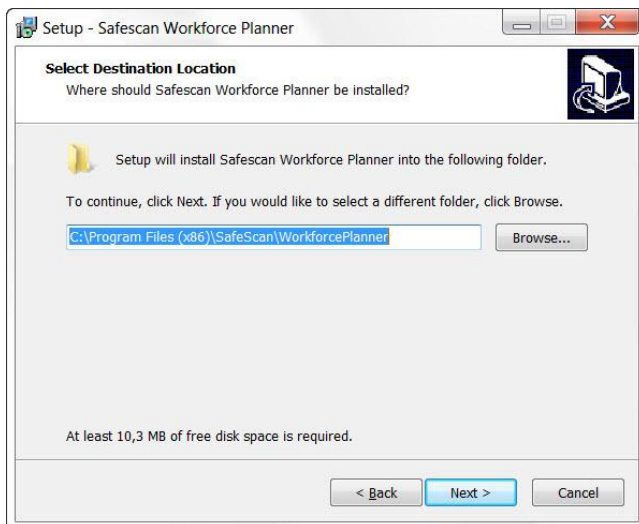
1. Insert the installation CD-ROM into the drive of your computer.
2. Open the [TimeAttendanceSetup] file and the installation program will start.



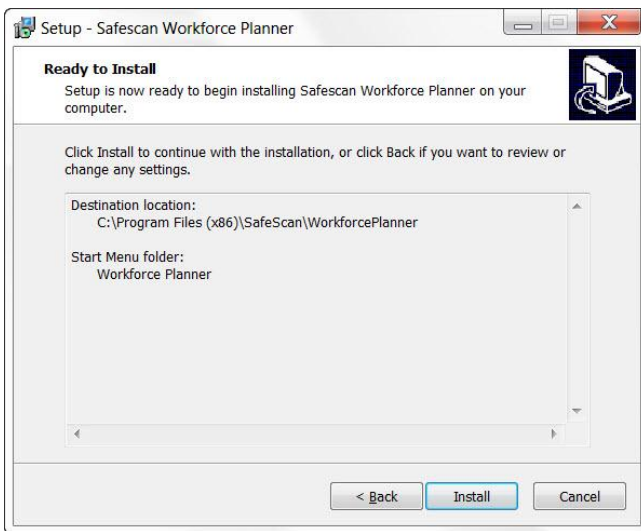
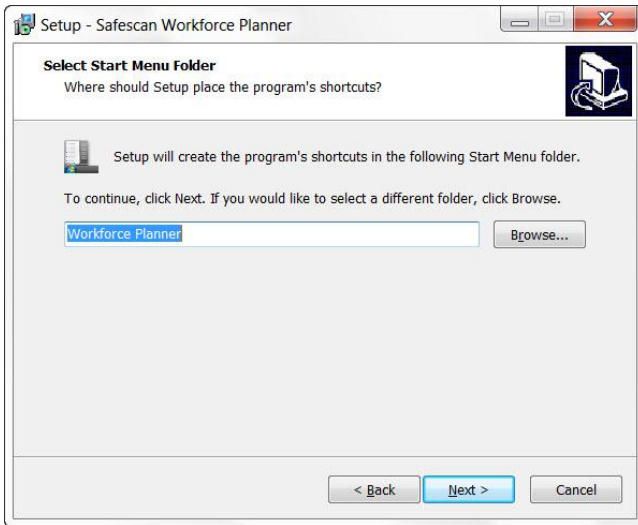
3. Accept the license terms.



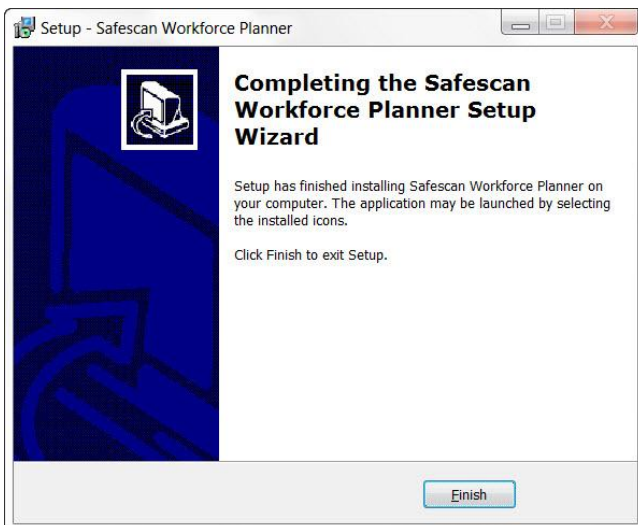
4. Specify the destination directory. c:/Program Files/Safescan/TA4 will be suggested to you as the default path for a different storage path, select [Browse] and search for the path you want. We recommend you use the default path.



5. Press [Next] to continue. The program will now be installed.

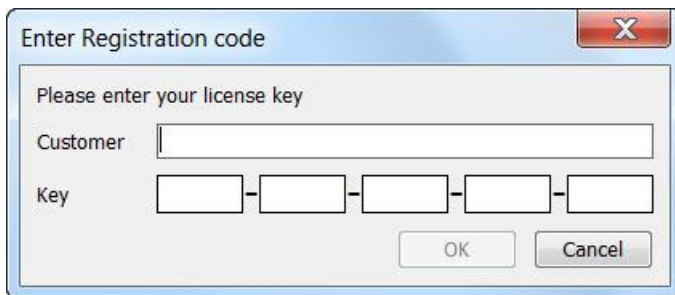


6. Use [Finish] to confirm that the installation is complete.



3.2 Setting up the software

- Use Start / Safescan Workforce Planner to open the software.
- Enter your email address and the license key which you have received by email.



Enter Registration code

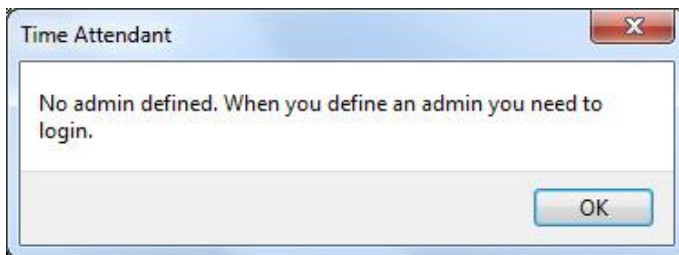
Please enter your license key

Customer

Key ----

OK Cancel

The first time you use the software or later if no supervisor/administrator is set (in the software and/or on the time attendance device), the following message will be displayed.



Time Attendant

No admin defined. When you define an admin you need to login.

OK

As soon as a supervisor or administrator has been defined, you can log in using the user name and password.



 **Safescan**

 User Name

Password

OK Cancel

Forgotten your password? When asked for your user name, enter your user ID and the license code as the password. (You will find the license code on the CD packaging). Use OK to confirm.

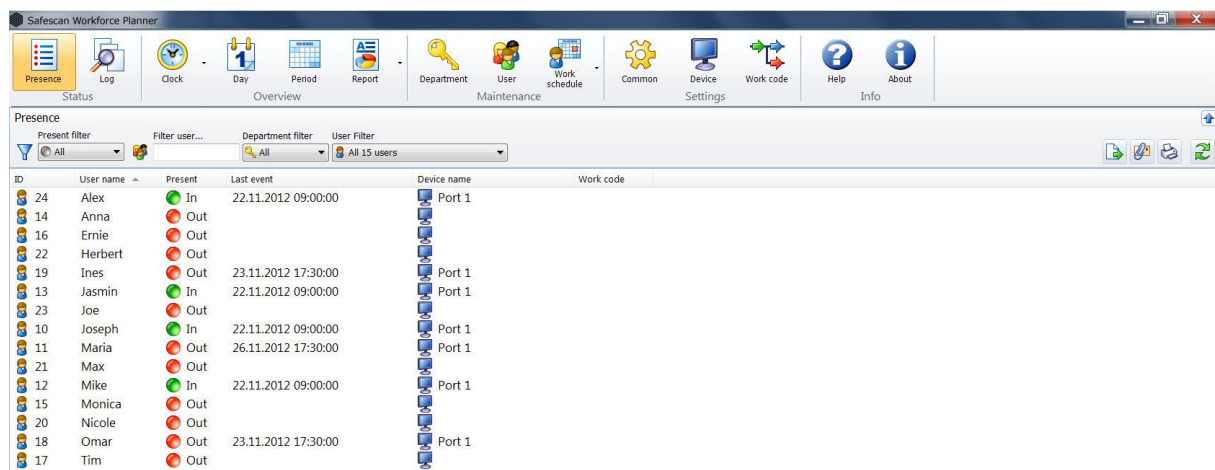
4 First Steps

1. Select the desired language, see **Chapter 11.1.1**
2. Create departments, see **Chapter 7.1.1**
3. Create work schedule Work Schedules, see **Chapter 7.3**
4. Create work codes, see **Chapter 11.2.1**
5. Add the user to the time attendance device or to the software, see **Chapter 7.2.1**
6. Connect your time attendance device to the software and synchronise the data with the time attendance device, see **Chapter 11.1.6**
7. Complete the employee master data, see **Chapter 7.2**
8. Plan your employees, see **Chapter 8**
9. Begin with the capture of clock times at the time attendance device.

5 Status

5.1 Presence/real-time summary

You can use the real-time summary to check the presence and absence of your employees. You can see at a glance who has signed in or out where and at what time, or who is taking a break. With the simple filtering method you can have the information you want up on the screen in no time, or you can print out the data on your printer.

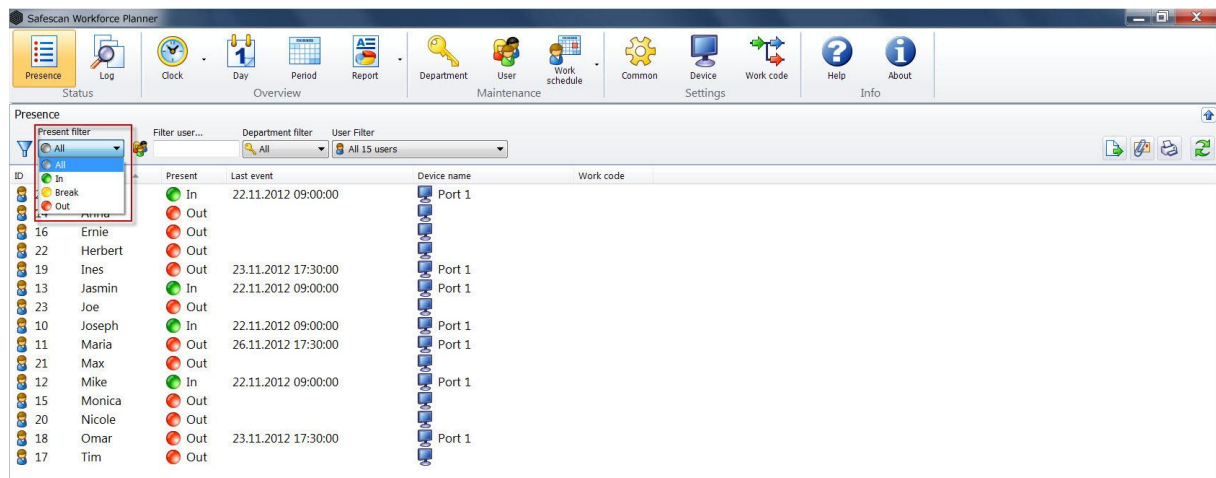


The screenshot shows the Safescan Workforce Planner interface. The main window displays a 'Presence' summary table with the following columns: ID, User name, Present status, Last event, Device name, and Work code. The table lists 15 users with their respective status and last event details.

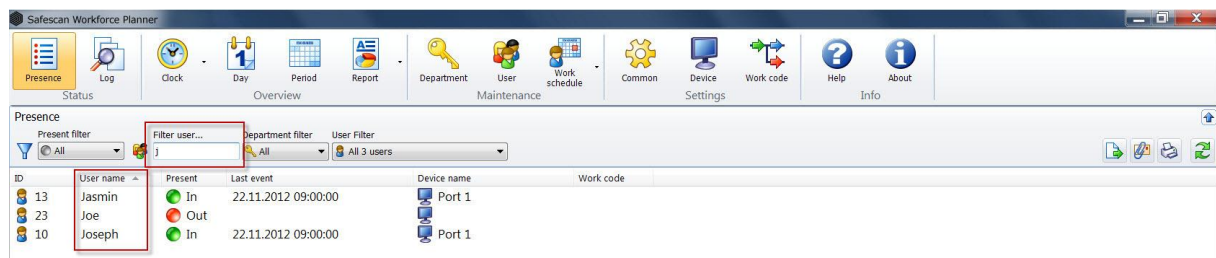
ID	User name	Present	Last event	Device name	Work code
24	Alex	In	22.11.2012 09:00:00	Port 1	
14	Anna	Out			
16	Ernie	Out			
22	Herbert	Out			
19	Ines	Out	23.11.2012 17:30:00	Port 1	
13	Jasmin	In	22.11.2012 09:00:00	Port 1	
23	Joe	Out			
10	Joseph	In	22.11.2012 09:00:00	Port 1	
11	Maria	Out	26.11.2012 17:30:00	Port 1	
21	Max	Out			
12	Mike	In	22.11.2012 09:00:00	Port 1	
15	Monica	Out			
20	Nicole	Out			
18	Omar	Out	23.11.2012 17:30:00	Port 1	
17	Tim	Out			

5.1.1 Filters (free filter, department filter or user drop-down)

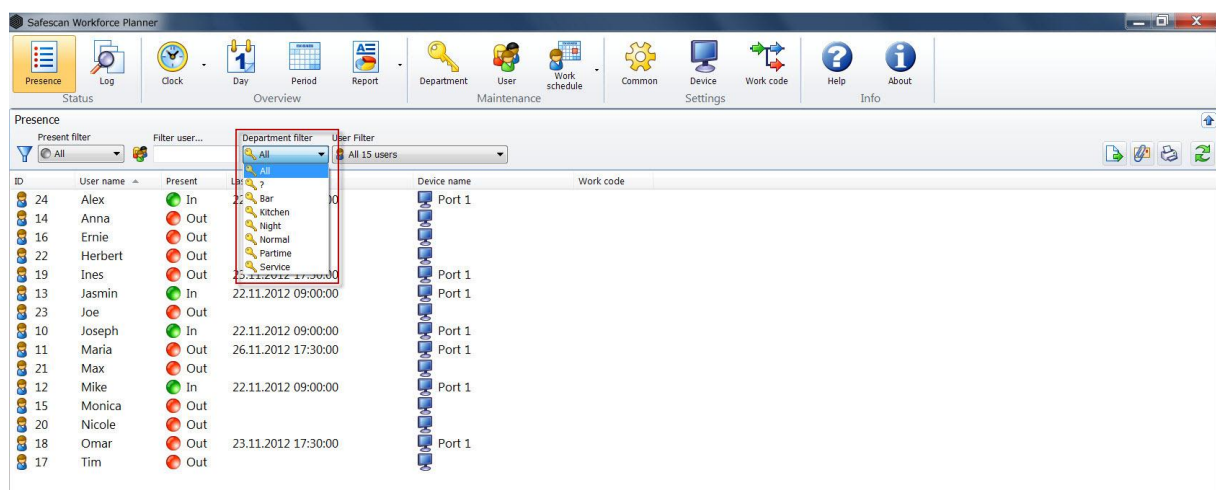
Present filter: Select the setting you want from the drop-down menu; present, absent, break or all.



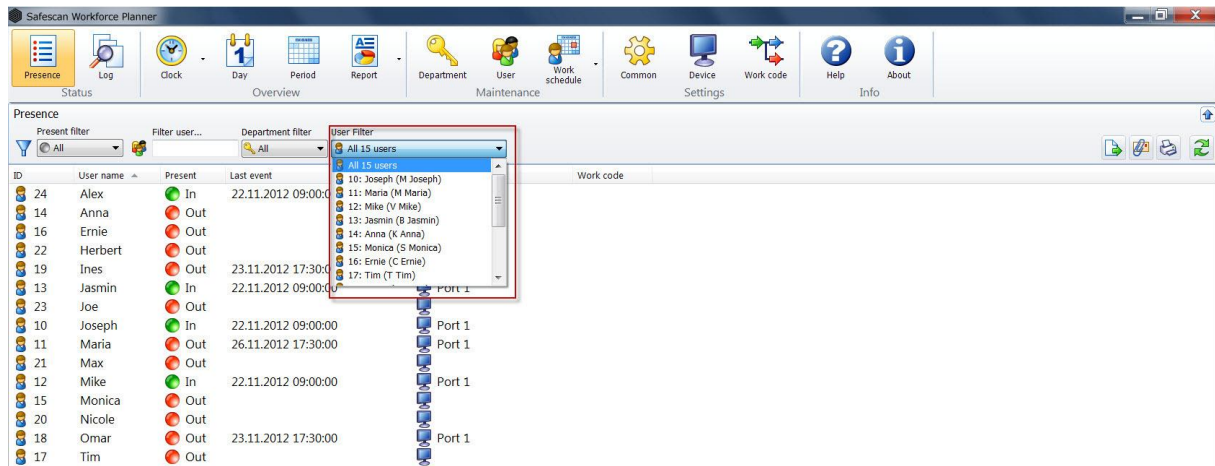
Free filter: Enter the first few letters for the user you want into the free filter. The summary will show you all users that have these same letters. The more detail of the name you enter, the more your filter result will be limited.



Department filter: Select the department you want from the drop-down menu. In the summary as well as in the user filter, all employees of that department are displayed. You can limit the results by using the user filter.

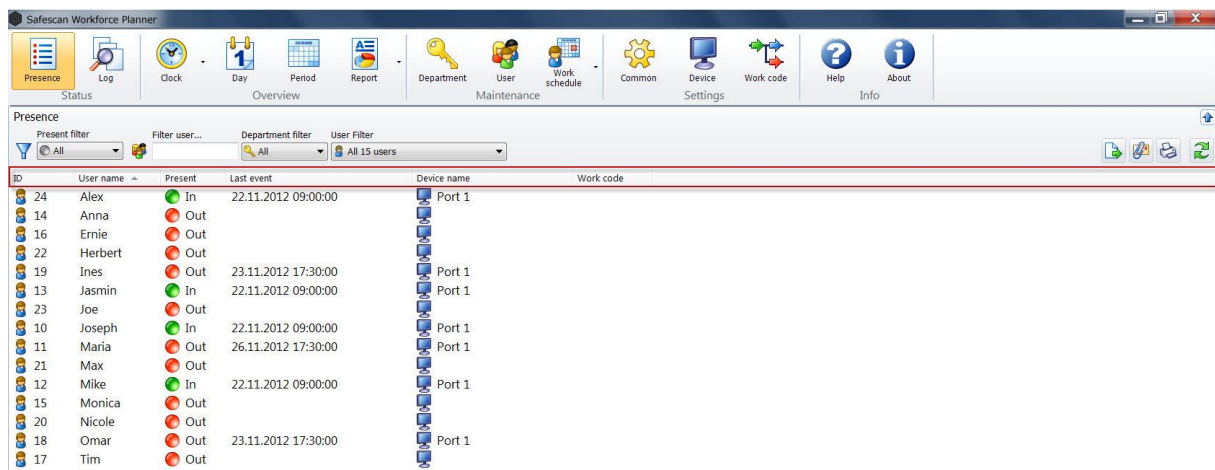


User filter: Select the user you want from the drop-down menu.




5.1.2 Sorting

Sorting via the menu bar: You can use the menu bar to sort data at any time by double clicking the field you want. Repeat this to reverse the order (A - Z or Z - A).




5.1.3 Printing

You can use  to print the real time summary at any time.

5.1.4 Send report by email

The overview you have created can be sent by email at any time.


When you click on , the current overview will be saved as a PDF, which can be attached to an email that you can subsequently edit and send.

5.1.5 Export overviews as a CSV file



You can export the current overview as a CSV file that can then be processed further in Excel or a similar program that can read CSV files.

The CSV file format describes the structure of a text file that can save or exchange data or lists with a simple structure.

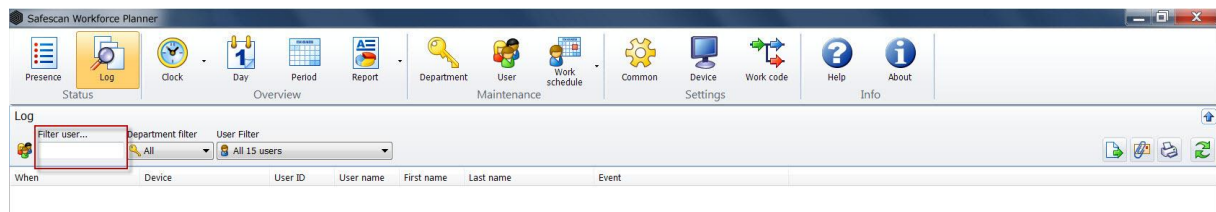
- Select the overview that you want to export.
- Click on the "Export CSV" icon .
- Name the export file and select the directory created for CSV export.
- Click on "Save".
- Click on "OK". The data is exported to the selected directory.

5.2 System log

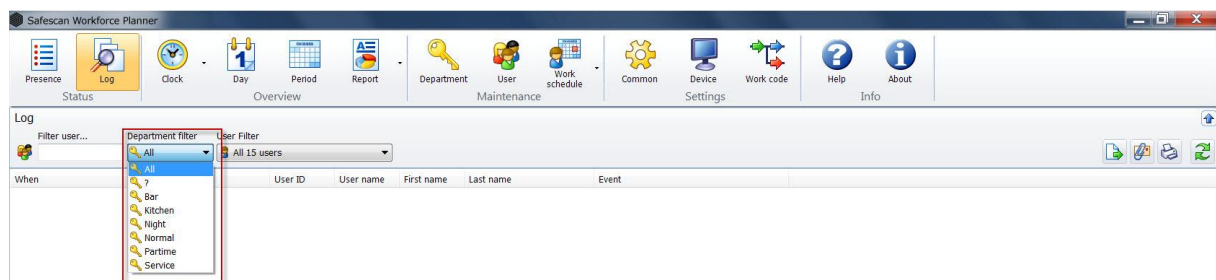
The system log summary displays all events, modifications or other manipulations on the time attendance device. The system log is used to log the communication sequence in and with the time attendance device in chronological order. When communication problems occur you can use the error description to eliminate the causes of these.

5.2.1 Filters (free filter, department filter or user drop-down)

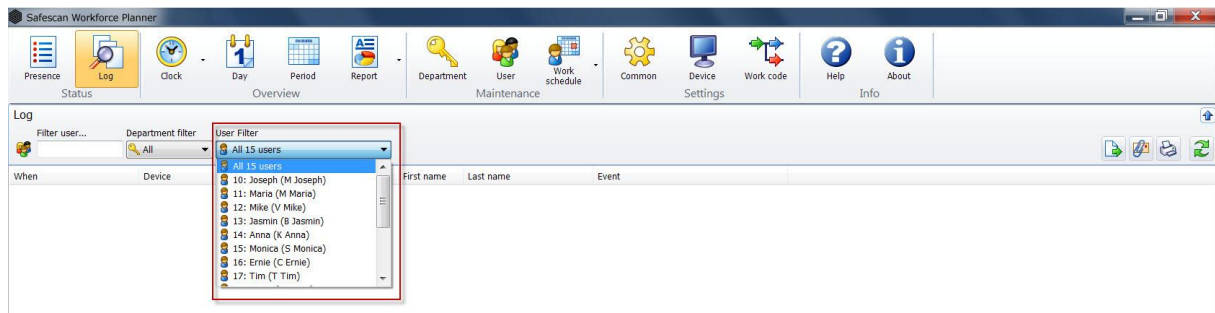
Free filter: Enter the first few letters for the user you want into the free filter. The summary will show you all users that have these same letters. The more detail of the name you enter, the more your filter result will be limited.



Department filter: Select the department you want from the drop-down menu. In the summary as well as in the user filter, all employees of that department are displayed. You can limit the results by using the user filter.

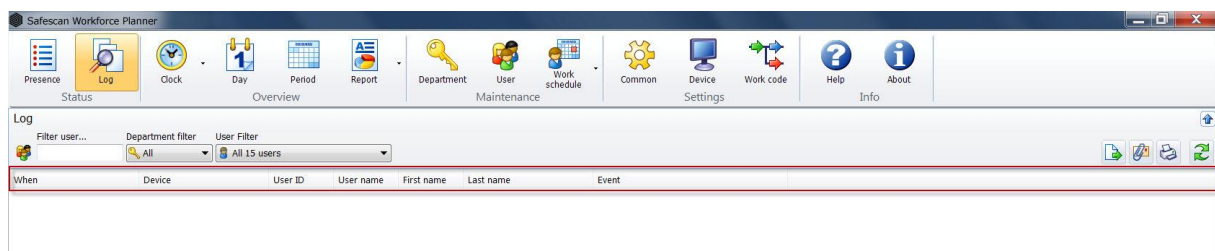


User filter: Select the user you want from the drop-down menu.




5.2.2 Sorting

Sorting via the menu bar: You can use the menu bar to sort data at any time by double clicking the field you want. Repeat this to reverse the order (A - Z or Z - A).




5.2.3 Printing


You can now print the system log summary .


5.2.4 Send report by email

The overview you have created can be sent by email at any time.

When you click on  this will print the current overview as a PDF attached to an email that you can subsequently edit and send.

5.2.5 Export views as a CSV file

You can export the current overview  as a CSV file that can then be processed further in Excel or a similar program that can read CSV files. The CSV file format describes the structure of a text file that can save or exchange data or lists with a simple structure.

- Select the overview that you want to export.
- Click on the "Export CSV" icon .
- Rename the export file and select the directory created for CSV export.
- Clicks "Save".
- Click on "OK". The data is exported to the selected directory.

6 Overview

Under "clock " you will find all the clock times that were recorded by the time attendance device and transferred directly via TCP/IP or USB stick into the software.

You can select the list view, which shows you a chronological list of all the clock times, or the grid view, which shows you the clock times relating to the individual settings and work planning of each employee.

6.1 Clock - list view



Incorrect bookings or missed clock times in this overview have an orange background (see image below). Please check whether the sequence matches (On/Off or On - Break - Return - Off etc.). Add a forgotten clock time as described in Chapter 6.2.1. Set the correct status (e.g. ignore) for duplicated clock times or incorrect bookings as described in Chapter 6.2.2

6.2 Adjust clocking times

Clocking times can be added or corrected under both clock and in the clock grid. Selecting the grid overview provides simple tools to correct clocking times or add forgotten clocking times with one click.


See **Chapter 6.7** Clock Grid.

6.2.1 Add clocking times

Missing clocking times can be subsequently added *as follows*:

The screenshot shows the Safescan Workforce Planner interface. The 'Report' tab is active, displaying a table of clocking times. A dropdown menu for 'User Filter' is open, showing a list of users. The table columns include User ID, User name, Last name, In/Out, Work code, Remark, User update, Changed, and First name.

User ID	User name	Last name	In/Out	Work code	Remark	User update	Changed	First name
10	Joseph	M	In				22.11.2012 14:08:00	Joseph
11	Maria	M	In					Maria
11	Maria	M	In				22.11.2012 14:08:10	Maria
11	Maria	M	Out					Maria
11	Maria	M	In					Maria
11	Maria	M	Out					Maria
12	Mike	V	In				22.11.2012 14:08:27	Mike
13	Jasmin	B	In				22.11.2012 14:08:18	Jasmin
18	Omar	K	In					Omar
18	Omar	K	Out					Omar
18	Omar	K	In					Omar
18	Omar	K	Out					Omar
19	Ines	G	In					Ines
19	Ines	G	Out					Ines
19	Ines	G	In					Ines
19	Ines	G	Out					Ines
24	Alex	D	In				22.11.2012 14:08:49	Alex

- Select the required user in the user filter.
- Click on either  "Add" or select Add clock time by clicking the right mouse button.

The screenshot shows the Safescan Workforce Planner interface. The 'Report' section is active, displaying a table of clock-in and clock-out events for user '11: Maria (M Maria)'. A context menu is open over the 'Add clock time' button in the table.

User ID	User name	Last name	When	In/Out	Work code	Remark	User update	Changed	First name
11	Maria	M	19.11.2012 09:00:00	In				21.11.2012 16:01:58	Maria
11	Maria	M	19.11.2012 12:30:00	Out					Maria
11	Maria	M	19.11.2012 12:30:00	In					Maria
11	Maria	M	19.11.2012 17:15:09	Ignore				20.11.2012 17:15:09	Maria
11	Maria	M	19.11.2012 17:15:09	Out					Maria
11	Maria	M	20.11.2012 16:01:49	In				21.11.2012 16:01:49	Maria
11	Maria	M	20.11.2012 16:01:49	Out					Maria
11	Maria	M	20.11.2012 16:02:02	In				21.11.2012 16:02:02	Maria
11	Maria	M	20.11.2012 16:02:02	Out				21.11.2012 16:02:02	Maria
11	Maria	M	21.11.2012 16:01:53	In				21.11.2012 16:01:53	Maria
11	Maria	M	21.11.2012 16:01:53	Out					Maria
11	Maria	M	21.11.2012 12:30:00	Out					Maria
11	Maria	M	21.11.2012 13:00:00	In					Maria
11	Maria	M	21.11.2012 17:30:00	Out					Maria

- Complete the fields marked in red. These are mandatory and must be filled in.

The 'Add clock time' dialog box is shown. It contains the following fields:

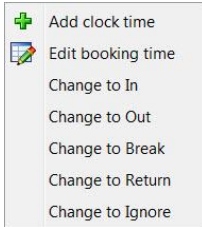
- Name: 11 Maria Maria M
- When: 22/11/2012
- Time: (Red box around the input field)
- In/Out: In
- Device: Port 1 (192.168.1.201)
- Work code: (Empty)
- Remark: (Empty text area)

Buttons: OK, Cancel

- Change, if required, the clock time date
- Enter in the input field the time of the clock time. The value must be entered in accordance with the country settings on your computer (e.g. 08:30 or 08.30, depending on the country setting). Full hours can be entered as a simple numeric code (e.g. 8 = 8:00, 13 = 13:00)
- Select the appropriate function for check in/check out.
- If multiple time recording devices are connected to your software, select this.
- If you have to add an absence such as vacation or doctor's appointment or allocate an employee to a project, contract, etc., add the required work code to the clock time clock time. (See additional description of work codes explained in **Chapter 11.20**). Please note, if you are using work codes, breaks and returns to work are not posted with in. For work code calculations, in means the end of the work code, and at this moment normal working time or another project commences.
- You have the opportunity with comments to include further information that will be displayed in the reports.
- Close the add an clock time clock time with OK if you want to save or press cancel to discard the clock time clock time.

6.2.2 Change an clock timeclock time

To edit a clock timeclock time created on a time attendance device or a manually created entry, click directly on the clock timeclock time you wish to change. If you only need to correct the status of the clock timeclock time, click with the right mouse button on the clock timeclock time to be modified to reveal the options. You can simply click on the correct status for clock time without having to open the editing window.



Correct the status IN/OUT. Add a work code or a comment to the clock timeclock time.

Note: It is not possible to modify the time. In a case of an incorrect booking, set the status to ignore and create a new clock timeclock time with the correct time.

6.2.3 Delete a clock timeclock time

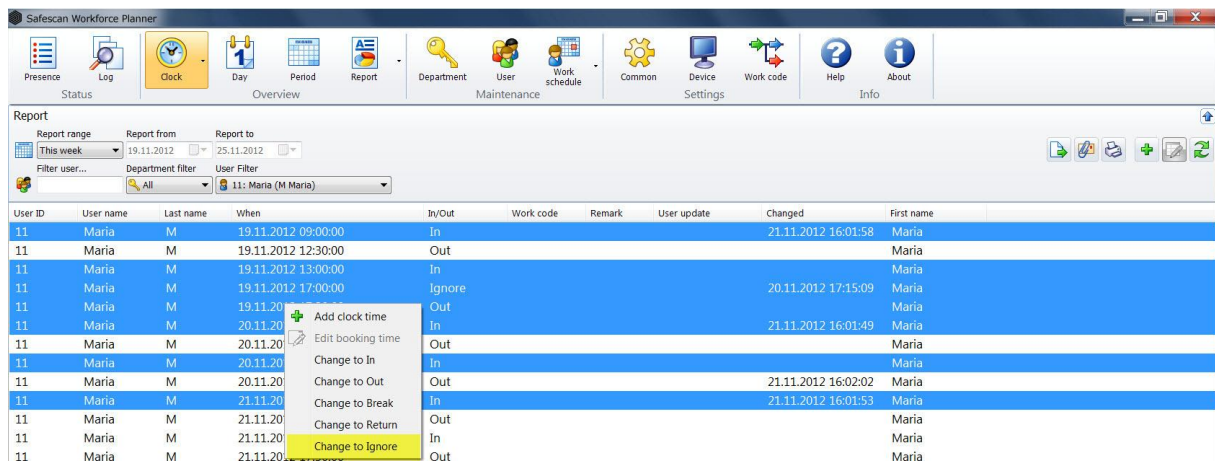
The deletion of a clock timeclock time created by the time attendance device or a manually created clock timeclock time is not possible. Incorrect bookings must be set to ignore so that they are not included in the calculations.

6.2.4 Delete an individual clock time

Select the clock time to "delete" and click with the right mouse button. You can now set the clock time to ignore without opening the edit window.

6.2.5 Delete more than one clock time

If there are several incorrect bookings, you can select them by the holding down the control key (Ctrl) and simply clicking on the desired clock time. If you have to set all the clock times to ignore, hold down the Ctrl key while clicking the right mouse button and select "Switch to ignore."



The screenshot shows the Safescan Workforce Planner interface. At the top, there is a navigation bar with icons for Status, Log, Clock, Day, Overview, Report, Department, User, Work schedule, Common, Device, Settings, Work code, Help, and Info. Below this is a 'Report' section with filters for Report range (This week), Report from (19.11.2012), Report to (25.11.2012), Filter user (All), Department filter, and User Filter (11: Maria (M Maria)). The main area is a table with columns: User ID, User name, Last name, When, In/Out, Work code, Remark, User update, Changed, and First name. A context menu is open over the row where 'When' is '20.11.20' and 'In/Out' is 'Out'. The menu options are: Add clock time, Edit booking time, Change to In, Change to Out, Change to Break, Change to Return, and Change to Ignore (highlighted in yellow).

User ID	User name	Last name	When	In/Out	Work code	Remark	User update	Changed	First name
11	Maria	M	19.11.2012 09:00:00	In				21.11.2012 16:01:58	Maria
11	Maria	M	19.11.2012 12:30:00	Out					Maria
11	Maria	M	19.11.2012 13:00:00	In					Maria
11	Maria	M	19.11.2012 17:00:00	Ignore				20.11.2012 17:15:09	Maria
11	Maria	M	19.11.20	Out					Maria
11	Maria	M	20.11.20	In				21.11.2012 16:01:49	Maria
11	Maria	M	20.11.20	Out					Maria
11	Maria	M	20.11.20	In					Maria
11	Maria	M	20.11.20	Out				21.11.2012 16:02:02	Maria
11	Maria	M	21.11.20	In				21.11.2012 16:01:53	Maria
11	Maria	M	21.11.20	Out					Maria
11	Maria	M	21.11.20	In					Maria
11	Maria	M	21.11.20	Out					Maria

User ID	User name	Last name	When	In/Out	Work code	Remark	User update	Changed	First name
11	Maria	M	19.11.2012 09:00:00	Ignore				22.11.2012 14:40:14	Maria
11	Maria	M	19.11.2012 12:30:00	Out					Maria
11	Maria	M	19.11.2012 13:00:00	Ignore				22.11.2012 14:40:14	Maria
11	Maria	M	19.11.2012 17:00:00	Ignore				20.11.2012 17:15:09	Maria
11	Maria	M	19.11.2012 17:30:00	Ignore				22.11.2012 14:40:14	Maria
11	Maria	M	20.11.2012 09:00:00	Ignore				22.11.2012 14:40:14	Maria
11	Maria	M	20.11.2012 12:30:00	Out					Maria
11	Maria	M	20.11.2012 13:00:00	Ignore				22.11.2012 14:40:14	Maria
11	Maria	M	20.11.2012 17:30:00	Out				21.11.2012 16:02:02	Maria
11	Maria	M	21.11.2012 09:00:00	Ignore				22.11.2012 14:40:14	Maria
11	Maria	M	21.11.2012 12:30:00	Out					Maria

Note: To protect employees, times posted on the time attendance device cannot be corrected or deleted. To change a time, add a new clock time and set the "incorrect booking" to ignore. This clock times created on the time attendance device will, however, no longer be calculated.

6.2.6 Filters (free filter, department filter or user drop-down)

Free filter: Enter the first few letters for the user you want into the free filter. The summary will show you all users that have these same letters. The more detail of the name you enter, the more your filter result will be limited.


User ID	User name	Last name	When	In/Out	Work code	Remark	User update	Changed	First name
10	Joseph	M	21.11.2012 09:00:00	Ignore				21.11.2012 13:20:35	Joseph
10	Joseph	M	22.11.2012 09:00:00	In				22.11.2012 14:08:00	Joseph
13	Jasmin	B	20.11.2012 11:00:00	In	Ziek				Jasmin
13	Jasmin	B	20.11.2012 15:00:00	Out					Jasmin
13	Jasmin	B	20.11.2012 17:00:00	In	Ziek				Jasmin
13	Jasmin	B	20.11.2012 21:00:00	Out					Jasmin
13	Jasmin	B	21.11.2012 09:00:00	In				21.11.2012 12:09:50	Jasmin
13	Jasmin	B	22.11.2012 09:00:00	In				22.11.2012 14:08:18	Jasmin


6.2.7 Sorting

Sorting via the menu bar: You can use the menu bar to sort data at any time by double clicking the field you want. Repeat this to reverse the order (A - Z or Z - A).

User ID	User name	Last name	When	In/Out	Work code	Remark	User update	Changed	First name
10	Joseph	M	21.11.2012 09:00:00	Ignore				21.11.2012 13:20:35	Joseph
10	Joseph	M	22.11.2012 09:00:00	In				22.11.2012 14:08:00	Joseph
13	Jasmin	B	20.11.2012 11:00:00	In	Sick				Jasmin
13	Jasmin	B	20.11.2012 15:00:00	Out					Jasmin
13	Jasmin	B	20.11.2012 17:00:00	In	Sick				Jasmin
13	Jasmin	B	20.11.2012 21:00:00	Out					Jasmin
13	Jasmin	B	21.11.2012 09:00:00	In				21.11.2012 12:09:50	Jasmin
13	Jasmin	B	22.11.2012 09:00:00	In				22.11.2012 14:08:18	Jasmin


6.2.8 Export view as a CSV file

You can export the current view  as a CSV file that can then be processed further in Excel or a similar program that can read CSV files. The CSV file format describes the structure of a text file that can save or exchange data or lists with a simple structure.


- Select the view that you want to export.
- Click on the "Export CSV" icon .
- Rename the export file and select the directory created for CSV export.
- Click on "Save".
- Click on "OK". The data is exported to the selected directory.

6.2.9 Send report by email

The overview you have created can be sent by email.

When you click on  the current overview will be saved as a PDF, which can be attached to an email that you can subsequently edit and send



6.2.10 Print

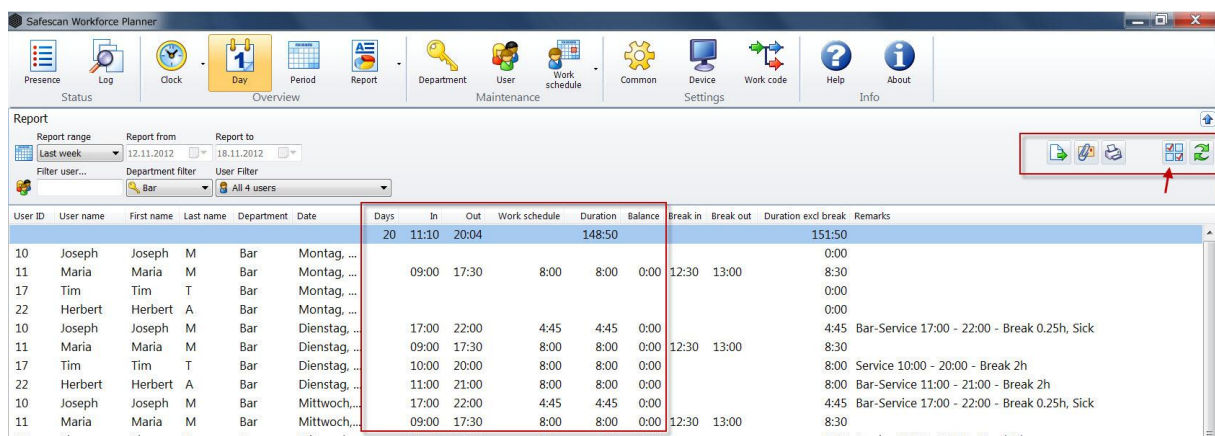
The current view can be printed out at any time with .

6.3 Day

All booking times from the current day that have been transferred to the software from your time attendance device directly via TCP/IP or USB stick are displayed. All important information about active users is also displayed.

The summary shows the first and last booking, the daily balance, break absences and the dedicated work

schedule which you can turn on or off by using the  / . You can adjust the date at any time. Dates are displayed chronologically and can be filtered and/or sorted to suit the user's needs.



User ID	User name	First name	Last name	Department	Date	Days	In	Out	Work schedule	Duration	Balance	Break in	Break out	Duration exci	break	Remarks
10	Joseph	Joseph	M	Bar	Montag...	20	11:10	20:04		148:50						151:50
11	Maria	Maria	M	Bar	Montag...		09:00	17:30	8:00	8:00	0:00	12:30	13:00			8:30
17	Tim	Tim	T	Bar	Montag...											0:00
22	Herbert	Herbert	A	Bar	Montag...											0:00
10	Joseph	Joseph	M	Bar	Dienstag...		17:00	22:00	4:45	4:45	0:00					4:45 Bar-Service 17:00 - 22:00 - Break 0.25h, Sick
11	Maria	Maria	M	Bar	Dienstag...		09:00	17:30	8:00	8:00	0:00	12:30	13:00			8:30
17	Tim	Tim	T	Bar	Dienstag...		10:00	20:00	8:00	8:00	0:00					8:00 Service 10:00 - 20:00 - Break 2h
22	Herbert	Herbert	A	Bar	Dienstag...		11:00	21:00	8:00	8:00	0:00					8:00 Bar-Service 11:00 - 21:00 - Break 2h
10	Joseph	Joseph	M	Bar	Mittwoch...		17:00	22:00	4:45	4:45	0:00					4:45 Bar-Service 17:00 - 22:00 - Break 0.25h, Sick
11	Maria	Maria	M	Bar	Mittwoch...		09:00	17:30	8:00	8:00	0:00	12:30	13:00			8:30

6.3.1 Creating a summary

In "Period", select the pre-defined periods or use the date picker to select your own date range.

The screenshot shows the 'Report' window in Safescan Workforce Planner. The 'Report range' is set to 'Last week' for the period 12.11.2012 to 18.11.2012. The 'Department filter' is set to 'Bar' and the 'User Filter' is set to 'All 4 users'. The report table displays the following data:

User ID	First name	Last name	Department	Date	Days	In	Out	Work schedule	Duration	Balance	Break in	Break out	Duration exci break	Remarks
10	Joseph	M	Bar	Montag, ...	20	11:10	20:04		148:50				151:50	
11	Maria	Maria	M	Bar	Montag, ...	09:00	17:30	8:00	8:00	0:00	12:30	13:00	8:30	
17	Tim	Tim	T	Bar	Montag, ...								0:00	
22	Herbert	Herbert	A	Bar	Montag, ...								0:00	
10	Joseph	Joseph	M	Bar	Dienstag, ...	17:00	22:00	4:45	4:45	0:00			4:45	Bar-Service 17:00 - 22:00 - Break 0.25h, Sick
11	Maria	Maria	M	Bar	Dienstag, ...	09:00	17:30	8:00	8:00	0:00	12:30	13:00	8:30	
17	Tim	Tim	T	Bar	Dienstag, ...	10:00	20:00	8:00	8:00	0:00			8:00	Service 10:00 - 20:00 - Break 2h
22	Herbert	Herbert	A	Bar	Dienstag, ...	11:00	21:00	8:00	8:00	0:00			8:00	Bar-Service 11:00 - 21:00 - Break 2h
10	Joseph	Joseph	M	Bar	Mittwoch, ...	17:00	22:00	4:45	4:45	0:00			4:45	Bar-Service 17:00 - 22:00 - Break 0.25h, Sick
11	Maria	Maria	M	Bar	Mittwoch, ...	09:00	17:30	8:00	8:00	0:00	12:30	13:00	8:30	
17	Tim	Tim	T	Bar	Mittwoch, ...	10:00	20:00	8:00	8:00	0:00			8:00	Service 10:00 - 20:00 - Break 2h
22	Herbert	Herbert	A	Bar	Mittwoch, ...	11:00	21:00	8:00	8:00	0:00			8:00	Bar-Service 11:00 - 21:00 - Break 2h
10	Joseph	Joseph	M	Bar	Donnerst, ...	17:00	22:00	4:45	4:45	0:00			4:45	Bar-Service 17:00 - 22:00 - Break 0.25h, Bar-Service 11:00 - 21:00 - Break 2h
11	Maria	Maria	M	Bar	Donnerst, ...	08:00	17:30	8:00	8:30	0:30	12:00	13:00	9:30	Workshop
17	Tim	Tim	T	Bar	Donnerst, ...	10:00	20:00	8:00	8:00	0:00			8:00	Service 10:00 - 20:00 - Break 2h
22	Herbert	Herbert	A	Bar	Donnerst, ...	12:00	22:00	7:30	7:30	0:00			7:30	Service 12:00 - 22:00 - Break 2.5h
10	Joseph	Joseph	M	Bar	Freitag, 1...	09:00	19:00	8:00	8:00	0:00			8:00	Kitchen 09:00 - 19:00 - Break 2h

6.3.2 Filters (free filter, department filter or user drop-down)

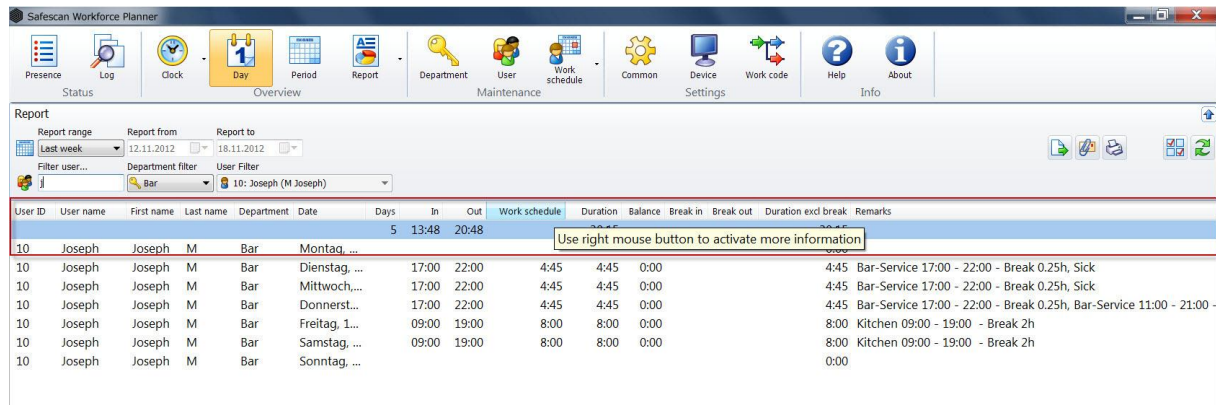
Free filter: Enter the first few letters for the user you want into the free filter. The summary will show you all users that have these same letters. The more detail of the name you enter, the more your filter result will be limited.

The screenshot shows the 'Report' window in Safescan Workforce Planner with filters applied. The 'Filter user...' field contains 'J' and the 'User Filter' dropdown shows '10: Joseph (M Joseph)'. The report table displays the following data:

User ID	User name	First name	Last name	Department	Date	Days	In	Out	Work schedule	Duration	Balance	Break in	Break out	Duration exci break	Remarks
10	Joseph	Joseph	M	Bar	Montag, ...	5	13:48	20:48		30:15				30:15	
10	Joseph	Joseph	M	Bar	Dienstag, ...		17:00	22:00	4:45	4:45	0:00			4:45	Bar-Service 17:00 - 22:00 - Break 0.25h, Sick
10	Joseph	Joseph	M	Bar	Mittwoch, ...		17:00	22:00	4:45	4:45	0:00			4:45	Bar-Service 17:00 - 22:00 - Break 0.25h, Sick
10	Joseph	Joseph	M	Bar	Donnerst, ...		17:00	22:00	4:45	4:45	0:00			4:45	Bar-Service 17:00 - 22:00 - Break 0.25h, Bar-Service 11:00 - 21:00 - Break 2h
10	Joseph	Joseph	M	Bar	Freitag, 1...		09:00	19:00	8:00	8:00	0:00			8:00	Kitchen 09:00 - 19:00 - Break 2h
10	Joseph	Joseph	M	Bar	Samstag, ...		09:00	19:00	8:00	8:00	0:00			8:00	Kitchen 09:00 - 19:00 - Break 2h
10	Joseph	Joseph	M	Bar	Sonntag, ...									0:00	


6.3.3 Sorting


Sorting via the menu bar: You can use the menu bar to sort data at any time by double clicking the field you want. Repeat this and the order is reversed (A - Z or Z - A).



User ID	User name	First name	Last name	Department	Date	Days	In	Out	Work schedule	Duration	Balance	Break in	Break out	Duration exci break	Remarks
10	Joseph	Joseph	M	Bar	Montag, ...	5	13:48	20:48							Use right mouse button to activate more information
10	Joseph	Joseph	M	Bar	Dienstag, ...		17:00	22:00		4:45	4:45	0:00			4:45 Bar-Service 17:00 - 22:00 - Break 0.25h, Sick
10	Joseph	Joseph	M	Bar	Mittwoch, ...		17:00	22:00		4:45	4:45	0:00			4:45 Bar-Service 17:00 - 22:00 - Break 0.25h, Sick
10	Joseph	Joseph	M	Bar	Donnerst...		17:00	22:00		4:45	4:45	0:00			4:45 Bar-Service 17:00 - 22:00 - Break 0.25h, Bar-Service 11:00 - 21:00
10	Joseph	Joseph	M	Bar	Freitag, 1...		09:00	19:00		8:00	8:00	0:00			8:00 Kitchen 09:00 - 19:00 - Break 2h
10	Joseph	Joseph	M	Bar	Samstag, ...		09:00	19:00		8:00	8:00	0:00			8:00 Kitchen 09:00 - 19:00 - Break 2h
10	Joseph	Joseph	M	Bar	Sonntag, ...										0:00


6.3.4 Export overviews as a CSV file

You can export the current overview  as a CSV file that can then be processed further in Excel or a similar program that can read CSV files. The CSV file format describes the structure of a text file that can save or exchange data or lists with a simple structure

- Select the view filter that you want to export.
- Click on the "Export CSV" icon .
- Rename the export file and select the directory created for CSV export.
- Click on "Save".
- Click on "OK". The data is exported to the selected directory.

6.3.5 Send report by email

The view you created can be sent by email at any time.

When you click on  the current overview will be saved as a PDF, which can be attached to an email that you can subsequently edit and send.

6.3.6 Print

The current view can be printed at any time with .

6.4 Period

All booking times of the active users are displayed in the period summary in compact form in the selected period. The summary gives you the total for the entire period, the hours according to the roster and the corresponding overtime balance as well as each daily balance. The data is displayed in user number order and can be filtered and/or sorted to suit the users' needs.

6.4.1 Creating a summary

In "Period", you can select the pre-defined periods or use the date picker to select your own date range.

User ID	User name	First name	Last name	Department	Work schedule	Duration	Balance	12.11.2012	13.11.2012	14.11.2012	15.11.2012	16.11.2012	17.11.2012	18.11.2012	Remarks
10	Joseph	Joseph	M	Bar	30:15	30:15	0:00	04:45	04:45	04:45	08:00	08:00			Bar-Service 17:00 - 22:00 - Break 0.25h, Sick, Bar-Service 17:00...
11	Maria	Maria	M	Bar	40:00	40:00	0:05	08:00	08:00	08:30	07:35				Workshop
12	Mike	Mike	V	Kitchen		40:00	40:00	08:00	08:00						
13	Jasmin	Jasmin	B	Service											
14	Anna	Anna	K	Service		12:00	12:00				04:00	08:00			
15	Monica	Monica	S	Service											
16	Ernie	Ernie	C	Kitchen											
17	Tim	Tim	T	Bar	40:00	40:00	0:00	08:00	08:00	08:00	08:00	08:00	08:00		Service 10:00 - 20:00 - Break 2h, Service 10:00 - 20:00 - Break...
18	Omar	Omar	K	Parttime	40:00	40:00	0:00	08:00	08:00	08:00	08:00	08:00			
19	Ines	Ines	G	Parttime	40:00	40:00	0:00	08:00	08:00	08:00	08:00	08:00			
20	Nicole	Nicole	P	Service											
21	Max	Max	M	Kitchen											
22	Herbert	Herbert	A	Bar	38:30	38:30	0:00	08:00	08:00	07:30	07:30	07:30			Bar-Service 11:00 - 21:00 - Break 2h, Bar-Service 11:00 - 21:00...
23	Joe	Joe	L	Kitchen											
24	Alex	Alex	D	Service											

6.4.2 Filters (free filter, department filter or user drop-down)

Free filter: Enter the first few letters for the user you want into the free filter. The summary will show you all users that have these same letters. The more detail of the name you enter, the more your filter result will be limited.


User ID	User name	First name	Last name	Department	Work schedule	Duration	Balance	12.11.2012	13.11.2012	14.11.2012	15.11.2012	16.11.2012	17.11.2012	18.11.2012	Remarks
10	Joseph	Joseph	M	Bar	30:15	30:15	0:00	04:45	04:45	04:45	08:00	08:00			Bar-Service 17:00 - 22:00 - Break 0.25h, Sick, Bar-Service 17:00...
13	Jasmin	Jasmin	B	Service											
23	Joe	Joe	L	Kitchen											


6.4.3 Sorting

Sorting via the menu bar: You can use the menu bar to sort data at any time by double clicking the field you want. Repeat this to reverse the order (A - Z or Z - A).

User ID	User name	First name	Last name	Department	Work schedule	Duration	Balance	12.11.2012	13.11.2012	14.11.2012	15.11.2012	16.11.2012	17.11.2012	18.11.2012	Remarks
10	Joseph	Joseph	M	Bar	30:15	30:15	0:00								Bar-Service 17:00 - 22:00 - Break 0.25h, Sick, Bar-Service 17:00...
13	Jasmin	Jasmin	B	Service											
23	Joe	Joe	L	Kitchen											


6.4.4 Export overviews as a CSV file

You can export the current overview  as a CSV file that can then be processed further in Excel or a similar program that can read CSV files. The CSV file format describes the structure of a text file that can save or exchange data or lists with a simple structure.

- Select the overview that you want to export.
- Click on the "Export CSV" icon .
- Rename the export file and select the directory created for CSV export.
- Click on "Save".
- Click on "OK". The data is exported to the selected directory.

6.4.5 Send report by email

The view you created can be sent by email at any time.

When you click on  the current overview will be saved as a PDF, which can be attached to an email that you can subsequently edit and send.

6.4.6 Print

The current rview can be printed out at any time with .

6.5 Bulletins / Reports

To ensure that end-of-moth analyses display the desired result, check the clock times recorded by users under "clock times" for forgotten or incorrect entries and complete or correct them (see **Chapter 6.2**). You have the option of attaching a work code to the clock times.

Safescan Workforce Planner is a system that computes instantly. All corrections made will be automatically allocated after entry to ensure the system is permanently up-to-date. Additional calculations are not required to create end-of-month statements.

All the information entered into Safescan Workforce Planner is taken into consideration in the reports. The reports show you the current state of overtime and the accrued balance as well as the holiday time for the current year, the holiday time taken and the holiday time remaining until the end of the year, all are specified in hours.

Once it has been installed, Safescan Workforce Planner offers various predefined reports that cater for most standard analyses.

The following predefined reports are available in Safescan Workforce Planner:

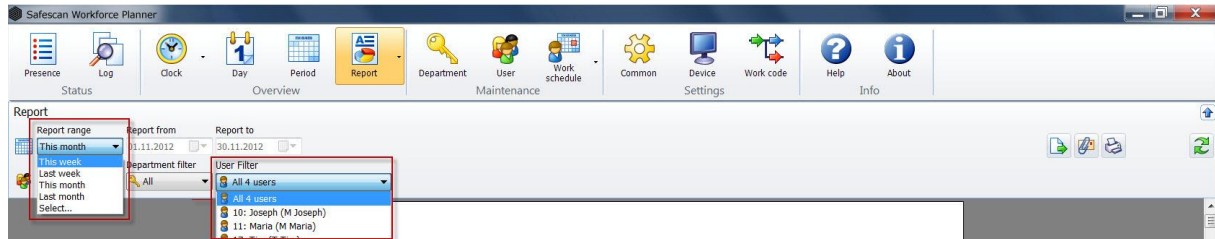
- Monthly Report
- Weekly Report
- Period Report
- Work code report


6.5.1 Monthly Bulletin / Report

The "Monthly Report" covers all schedules, balances and events for the selected time period. For schedules with a work code, this is indicated by notes/work code.

6.5.2 Create and print a monthly report

- Select the menu item reports.
- Select the desired time period (current month, last month, etc.) from the drop down menu; the default displays the current month.



In the overview, the monthly reports for all users are available, select  and all the reports can be printed.

- Select a department with the department filter and you will obtain the monthly reports for that department.
- Select the desired user with the user filter and you will obtain a monthly report for that user.

Date: 22-11-2012		Monthly report				01-11-2012 - 30-11-2012				
Time: 14:55		Name: Joseph M		ID: 10	Department: Bar		Work schedule:		Personnel no: 120921	
Vacation hours 208		Vacation taken 0		in this period 48		Remaining days of vacation		160		
Overtime balance forward 0,0		Overtime current month -53,3		Overtime previous month -53,3						
Date	Day	In	Out	Roster	Hours	Balance	Cumm.	Absent	Remarks / Work code	
01-11	Thu	11:00	15:00	8:00	8:00	-	-	-	Bar-Service 11:00 - 21:00 - Break 2h	
02-11	Fri	11:00	15:00	8:00	8:00	-	-	-	Bar-Service 11:00 - 21:00 - Break 2h	
03-11	Sat	11:00	15:00	8:00	8:00	-	-	-	Bar-Service 11:00 - 21:00 - Break 2h	
04-11	Sun	-	-	-	-	-	-	-	-	
Week 44				24:00	24:00	-				
05-11	Mon	-	-	-	-	-	-	8:00	Vacation for Shift-Planning	
06-11	Tue	-	-	-	-	-	-	8:00	Vacation for Shift-Planning	
07-11	Wed	-	-	-	-	-	-	8:00	Vacation for Shift-Planning	
08-11	Thu	-	-	-	-	-	-	8:00	Vacation for Shift-Planning	
09-11	Fri	-	-	-	-	-	-	8:00	Vacation for Shift-Planning	
10-11	Sat	-	-	-	-	-	-	8:00	Vacation for Shift-Planning	
11-11	Sun	-	-	-	-	-	-	-	-	
Week 45				48:00	48:00	-				

Note: All reports can be printed or exported as a CSV file.

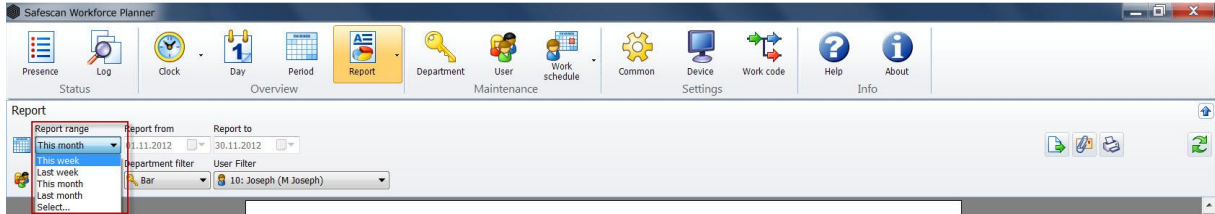
6.5.3 Weekly Bulletin / Report

The weekly report is analogous to the monthly report. Select "week" from the drop down menu and use the same method as for the monthly report to obtain and print the desired overview.

The weekly report displays all the essential information for the selected time period and users in a compact form. The report indicates the first and last bookings, the clock time, the target time and daily balance. Additionally, the accumulated balance is shown for the selected date and any reasons for absence. All the data for the selected users are summarised in the lower part of the list.

6.5.4 Prepare and Print the Weekly Report

- Select the menu item report.
- Select the desired time period (current week, last week, etc.) from the drop down menu; the default is to display the current week.



In the overview, the weekly reports for all users are available, select print and all the reports can be printed.

- Select a department with the department filter and you will obtain the weekly reports for that department.
- Select the desired user with the user filter and you will obtain the weekly report for that user.

Date: 22-11-2012		Weekly report		12-11-2012 - 18-11-2012					
Time: 14:56		Name: Joseph M		ID: 10	Work schedule:				
		Department: Bar		Personnel no: 120921					
Vacation hours 208		Vacation taken 48		in this period 0					
				Remaining days of vacation 160					
Overtime balance forward 0.0		Overtime current month 0.0		Overtime previous month 0.0					
Date	Day	In	Out	Roster	Hours	Balance	Cumm.	Absent	Remarks / Work code
12-11	Mon	-	-	-	-	-	-	-	-
13-11	Tue	17:00	18:00	4:45	4:45	-	-	-	Bar-Service 17:00 - 22:00 - Break 0.25h, Sick
14-11	Wed	17:00	18:00	4:45	4:45	-	-	-	Bar-Service 17:00 - 22:00 - Break 0.25h, Sick
15-11	Thu	17:00	18:00	4:45	4:45	-	-	-	Bar-Service 17:00 - 22:00 - Break 0.25h, Bar-Service 11:00 - 21:00 - Break 2h
16-11	Fri	9:00	15:00	8:00	8:00	-	-	-	Kitchen 09:00 - 19:00 - Break 2h
17-11	Sat	9:00	15:00	8:00	8:00	-	-	-	Kitchen 09:00 - 19:00 - Break 2h
18-11	Sun	-	-	-	-	-	-	-	-
Week	46			30:15	30:15	-			
Total				30:15	30:15	-			

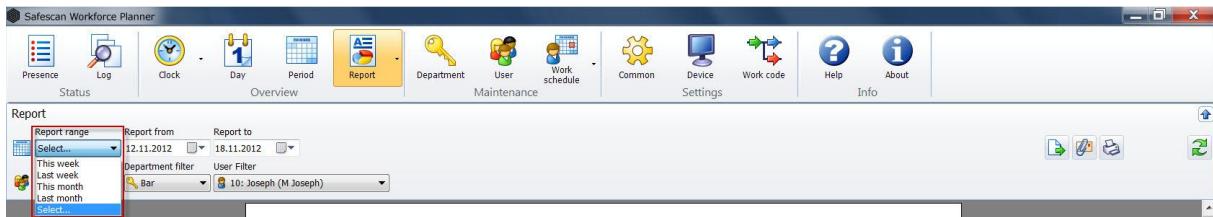
Note: All reports can be printed or exported as a CSV file.

6.5.5 Period Bulletin / Report

The "period report" is similar in configuration to the monthly and weekly report. However, the values for a selected time period are summarised. In the report, the totals for actual hours, target hours and the daily balances are displayed. In one column you can also see the cumulative total balance at the end of the selected time period. In the footer Chapter of the list, all the data for the selected employee are summarised.

6.5.6 Prepare and Print the Period Report

- Select the menu item report.
- Choose select from the drop-down menu and using the date picker, enter the desired dates from - until. The default is to display the current month.



In the overview, the period reports for all users are available, select print and all the reports can be printed.

- Select a department with the department filter and you will obtain the period reports for that department.
- Select the desired user with the user filter and you will obtain the period report for that user.

Date: 22-11-2012		Period report				05-11-2012 - 11-11-2012		Time: 14:57	
Name: Joseph M		ID: 10		Work schedule:				Personnel no: 120921	
Department: Bar		Vacation hours 208		Vacation taken 0		in this period 48		Remaining days of vacation 160	
Overtime balance forward 0.0		Overtime current month 0.0		Overtime previous month 0.0					
Date	Day	In	Out	Roster	Hours	Balance	Cumm.	Absent	Remarks / Work code
05-11	Mon	-	-	-	-	-	-	-	8:00 Vacation for Shift-Planning
06-11	Tue	-	-	-	-	-	-	-	8:00 Vacation for Shift-Planning
07-11	Wed	-	-	-	-	-	-	-	8:00 Vacation for Shift-Planning
08-11	Thu	-	-	-	-	-	-	-	8:00 Vacation for Shift-Planning
09-11	Fri	-	-	-	-	-	-	-	8:00 Vacation for Shift-Planning
10-11	Sat	-	-	-	-	-	-	-	8:00 Vacation for Shift-Planning
11-11	Sun	-	-	-	-	-	-	-	-
Week 45				48:00		48:00			
Total				48:00		48:00			

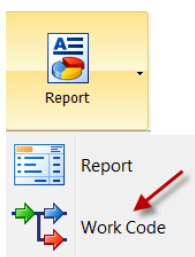
Note: All reports can be printed or exported as a CSV file.

6.6 Work or Project Code

The registered work or project codes at the device are calculated and evaluated in the software.

(This function is not possible with TA655).

For the calculation or evaluation of the work- or project code choose under the "Reports" menu the button "Work Code" and set the Report Area according to your needs.



Workcode Report

Report Range: Last month | Report From: 01.03.2012 | Report To: 31.03.2012

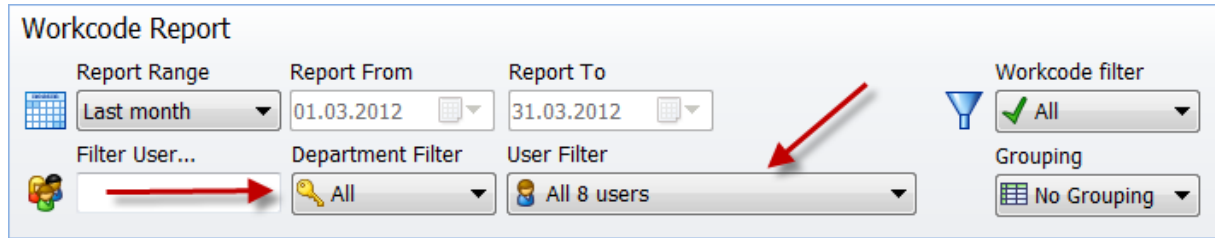
Filter User...: | Department Filter: All | User Filter: All 8 users

Workcode filter: All

Grouping: No Grouping

6.6.1 Evaluation per Department or User

If you want to see how much time is spend on the different projects per department or employee, use the "Department- and/or User-Filter". You will receive an overview of all activities which have been logged with a code.



User ID	User Name	First Name	Last Name	Department	Date	Workcode #	Work Code	Time
1	CarolaS	Carola	Carola	HR	29.03.2012	6	Arztbesuch	8:00
2	Michael	Michael	Michael	Rep.	27.03.2012	110	Projekt Paris	8:00
2	Michael	Michael	Michael	Rep.	29.03.2012	1	Urlaub	8:00
3	Hans M	Hans	Hans	M	27.03.2012	120	Projekt München	8:00
3	Hans M	Hans	Hans	M	28.03.2012	120	Projekt München	8:16
3	Hans M	Hans	Hans	M	29.03.2012	110	Projekt Paris	8:00
4	Monique	Monique	Monique	CS	27.03.2012	100	Projekt London	8:00
5	Cor	Cor	Cor	M	27.03.2012	100	Projekt London	8:00
5	Cor	Cor	Cor	M	28.03.2012	100	Projekt London	8:00
5	Cor	Cor	Cor	M	29.03.2012	100	Projekt London	7:53
434	Peter	Peter	Peter	CS	29.03.2012	100	Projekt London	5:44

6.6.2 Evaluation per Work / Project Code

If you need the evaluation per Work / Project Code select Work code-Filter, followed by the required code. You will get an overview of all users with the dates they have been working at this project.

User ID	First Name	Last Name	Department	Date	Workcode #	Work Code	Time
4	Monique	Niks	CS	27.03.2012	100	Projekt London	8:00
5	Cor	Meijer	M	27.03.2012	100	Projekt London	8:00
5	Cor	Meijer	M	28.03.2012	100	Projekt London	8:00
5	Cor	Meijer	M	29.03.2012	100	Projekt London	7:53
434	Peter		CS	29.03.2012	100	Projekt London	5:44

Overview of the selected project in the chosen period sorted by date and user

6.6.3 Condense search with the filter grouping (day / person / code).

When you select "Day", the sum of project hours per day is shown.

Date	Workcode #	Work Code	Time
27.03.2012	100	Projekt London	16:00
28.03.2012	100	Projekt London	8:00
29.03.2012	100	Projekt London	13:37

Sum of selected project per day, for all users and the chosen period of time

When you select „Person“ the project hours are shown by user.

Workcode Report

Report Range: Last month | Report From: 01.03.2012 | Report To: 31.03.2012

Filter User...: All | Department Filter: All 8 users | User Filter: All 8 users

Workcode filter: 100 Projekt L | Grouping: Person

User ID	User Name	First Name	Last Name	Department	Workcode #	Work Code	Time
4	Monique	Monique	Nihs	CS	100	Projekt London	8:00
5	Cor	Cor	Meijer	M	100	Projekt London	23:53
434	Peter	Peter		CS	100	Projekt London	5:44

Total hours per employee for the selected project and the set period of time

When you select "Work-code" the total amount of hours for the selected project is shown.

Workcode Report

Report Range: Last month | Report From: 01.03.2012 | Report To: 31.03.2012

Filter User...: All | Department Filter: All 8 users | User Filter: All 8 users

Workcode filter: 100 Projekt L | Grouping: Work code

Workcode #	Work Code	Time
100	Projekt London	37:37

Total hours for the selected project and period of time

To see an overview of total hours per project, select under the Work code filter "All" and under grouping "Work code".

Workcode Report

Report Range: Last month | Report From: 01.03.2012 | Report To: 31.03.2012


Filter User...: All | Department Filter: All 8 users | User Filter: All 8 users


Workcode filter: All | Grouping: Work code

Workcode #	Work Code	Time
1	Vacation	8:00
6	Doctors Visit	8:00
100	Projekt London	37:37
110	Projekt Paris	16:00
120	Projekt München	16:16

Sum of all worked hours per project for the selected period of time

6.6.4 Export overviews as a CSV file

You can export the current overview  as a CSV file that can then be processed further in Excel or a similar program that can read CSV files. The CSV file format describes the structure of a text file that can save or exchange data or lists with a simple structure

- Select the overview that you want to export.
- Click on the "Export CSV" icon .
- Rename the export file and select the directory created for CSV export.
- Click on "Save".
- Click on "OK". The data is exported to the selected directory.


6.6.5 Printing of selected summaries

The selected overview can be exported with the export icon in a CSV-format and edited in for example Excel or can be printed directly by using the printer icon.



6.6.6 Email

The overview you created can be sent by email at any time.

When you click on  the current overview will be saved as a PDF, which can be attached to an email that you can subsequently edit and send.

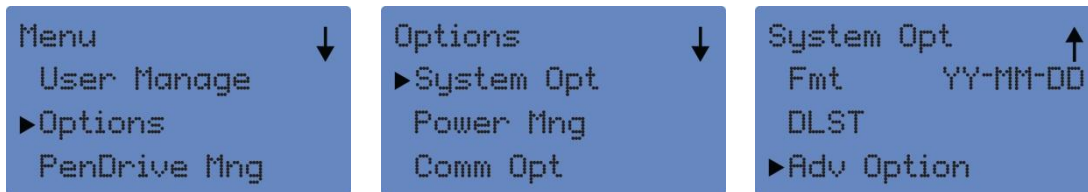
6.6.7 To capture the Work- / Project-Codes at the TA-800 Device

For the registration of the Work- / Project-Codes at the Device by the employees there are 2 options. They can enter the code prior to the verification or enter the code after the verification at the device. Activate the function "Work-code" at your Device.

At the TA-800 series proceed as followed:

Press the menu button and log in at the device as a supervisor.

Then select **Options / System opt. / Advanced opt**



Scrolling down with the F2 button to the option the Work-code (default NO) and confirm with OK.

The following selection is available:

- No = Work- / Project code is not enabled
- Mode 1 = enter the code after the verification at the device
- Mode 2 = enter the code before the verification at the device

With the TA-800 series only numeric codes can be entered. It's recommended to place an overview with the codes next to the device.

6.6.8 To capture the Work- / Project-Codes at the TA-900 Device

With the TA 900 series, you can define the Work- / Project-Code at the device.

- Menu
- User



Note: The Work- or Project-Codes must match with the codes defined in the software!

6.6.9 How to clock Work- / Project-Code at the device?

Depending on the set mode the user will be asked for a Work- / Project-Code before or after the verification at the device. The entry of the code may be ignored if the employee does not work on a specific project.

Work- / Project-Codes must be clocked only with arrival or departure, not during breaks.

In case a person is working on several projects during a day, he must select the "arrival" option when changing work codes. At the end of the working day or completion of the project and transition to normal working hours the booking has to be completed with clock-out.

For example:

8:00 -11:00 Project London (code 100)

10:00-10:15 Break

11:00-17:15 Project Paris (code 110)

The employee should clock as followed:

8:00 Clock-In/Code 100

10:00 Break

10:15 Break return

11:00 Clock-In/Code 110

17:15 Clock-Out/Code 110

User ID	User Name	Last Name	Department	When	Device	In/Out	Verify Mode	Work Code	Remark	User update	Changed
2	Michael	Kaiser	Rep.	02.04.2012 08:00...	Safescan East Port	In	Manual	London			02.04.2012 15:31:03
2	Michael	Kaiser	Rep.	02.04.2012 10:00...	Safescan East Port	Break	Manual				02.04.2012 15:31:15
2	Michael	Kaiser	Rep.	02.04.2012 10:15...	Safescan East Port	Return	Manual				02.04.2012 15:31:24
2	Michael	Kaiser	Rep.	02.04.2012 11:00...	Safescan East Port	In	Manual	Paris			02.04.2012 15:31:34
2	Michael	Kaiser	Rep.	02.04.2012 17:15...	Safescan East Port	Out	Manual	Paris			02.04.2012 15:31:48

Calculation of Project: Project London 2 h 45 min, break 15 min, Project Paris 5 h 15 min

(work schedule - 1 h lunch break) = 8 h

Workcode Report

Report Range: Select... | Report From: 02.04.2012 | Report To: 02.04.2012 | Workcode filter: All

Filter User...: All | Department Filter: All | User Filter: 2: Michael (Kaiser Michael) | Grouping: No Grouping

User ID	User Name	First Name	Last Name	Department	Date	Workcode #	Work Code	Time
2	Michael	Michael	Kaiser	Rep.	02.04.2012	100	Projekt London	2:45
2	Michael	Michael	Kaiser	Rep.	02.04.2012	110	Projekt Paris	5:15

Overview on monthly report:

Date: 05-04-2012		Monthly report						01-04-2012 - 30-04-2012		
Time: 13:36										
Name: Michael Kaiser				ID: 2		Timetable group: 40h				
				Department: Rep.		Personnel number: 2496				
Date	Day	TP	In	Out	Roster	Hours	Saldo	Cumm.	Absent	Remarks / Work code
01-04	Sun	1	-	-	-	-	-	-	-	
Week		13								
02-04	Mon	2	8:00	10:00	8:00	8:00	-0:00	-0:00		London, Paris
			10:15	17:15						

If a user forgets to clock-out at the end of a working day, the system will automatically register the normal end-time according to the employees work schedule. If no work schedule is set for the employee, the administrator will need to add this entry manually in the software.

For example:

An employee has to leave at 4: 00 pm for a doctor's appointment (code 6) and worked during the day on project London (code 100). After his doctor's visit he will not return to work.

The employee will clock as followed:

8:00 Clock-In /Code 100

16:00 Clock-In/Code 6

Calculation project:

Project London = 7h, doctors visit = 1h total working hour per day 8 h

User ID	User Name	First Name	Last Name	Department	Date	Work...	Work Code	Time
2	Michael	Michael	Kaiser	Rep.	03.04.2012	6	Doctors Visit	1:00
2	Michael	Michael	Kaiser	Rep.	03.04.2012	100	Projekt London	7:00

Date: 05-04-2012		Monthly report				01-04-2012 - 30-04-2012				
Time: 13:38										
Name: Michael Kaiser		ID: 2		Timetable group: 40h						
		Department: Rep.		Personnel number: 2496						
Date	Day	TP	In	Out	Roster	Hours	Saldo	Cumm.	Absent	Remarks / Work code
01-04	Sun	1	-	-	-	-	-	-	-	
Week		13								
02-04	Mon	2	8:00	10:00	8:00	8:00	-0:00	-0:00		London, Paris
			10:15	17:15						
03-04	Tue	2	8:00	17:00	8:00	8:00	-0:00	-0:00		London, DR, Signed off by system

Total working day 08:00-17:00 = 9 h minus the lunch break in the work schedule of 1 h = 8 h

6.7 Clock grid view

The clock grid view shows the clock times for all employees in the current month (default setting) as well as the assigned work schedule or shift schedule and all events. Filter the results through the incorrect bookings and correct them directly in the grid or see which employee has not fulfilled the work schedule on which days (holiday, early, arrive late) and which employees are on holiday or busy with which project.

Changes, corrections or the addition of forgotten bookings are a breeze in the clock grid view.

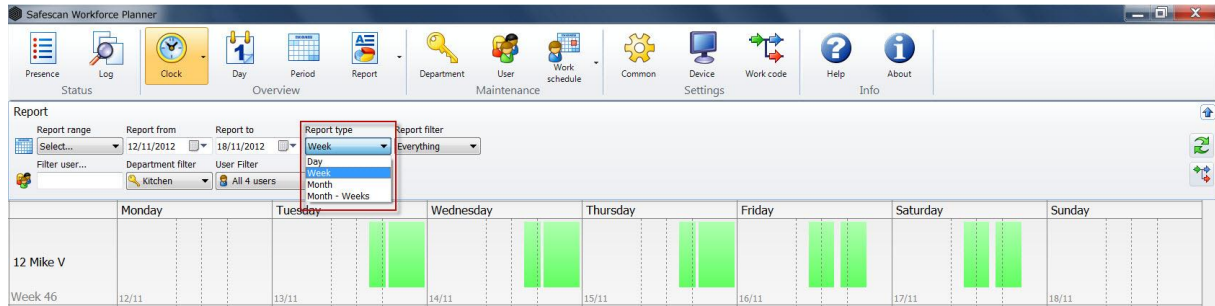
For example, an employee has forgotten to clock-in or out on the time attendance device or later you have to add a sick day or holiday; this can be done with one click.

6.7.1 Report Chapter

Select the desired time period for which the overview is to be displayed. e.g. month, week, etc. in the report filter Chapter.

The screenshot shows the Safescan Workforce Planner interface. The 'Report' section is active, and a dropdown menu is open for 'Report range'. The menu options are: Today, Yesterday, This week, This month, Last month, This year, Last year, Select..., and Take a break. The main grid shows a weekly overview from Monday to Sunday with green bars representing work periods.

6.7.2 Report form



Day = date e.g. 9.10.2012

	01.08.2011
12 Mike V	

Weeks = weekdays are visible in the title bar, calendar weeks in the user field as well as the date in the cell

	Monday
12 Mike V	
Week 46	12.11

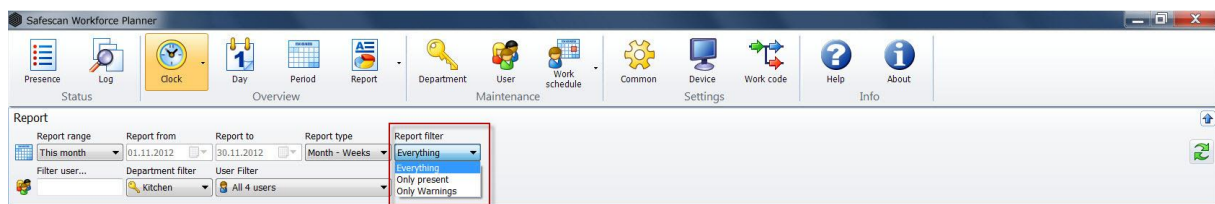
Months = displays all of the current month in which the specified time period is visible in the report Chapter. Days are visible in the title bar, months in the user field and the date in the cell

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
12 Mike V																		
November	01.11	02.11	03.11	04.11	05.11	06.11	07.11	08.11	09.11	10.11	11.11	12.11	13.11	14.11	15.11	16.11	17.11	18.11

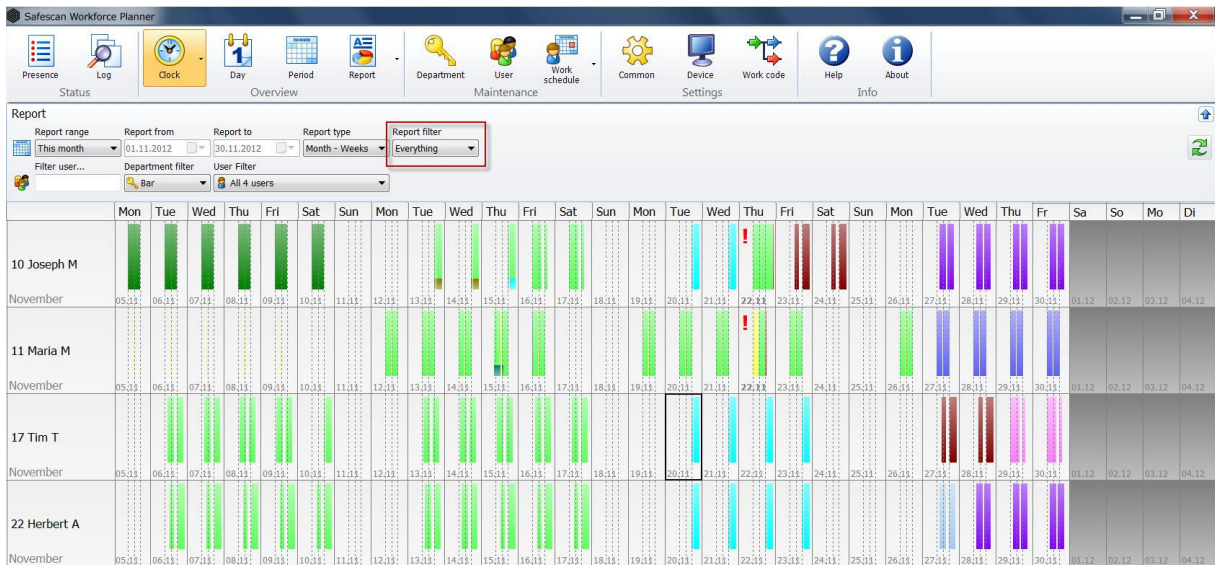
Month - Week = in this view, the current month is shown in the same way as under month and also includes weekdays in the title bar.

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon
12 Mike V								
November	29.10	30.10	31.10	01.11	02.11	03.11	04.11	05.11

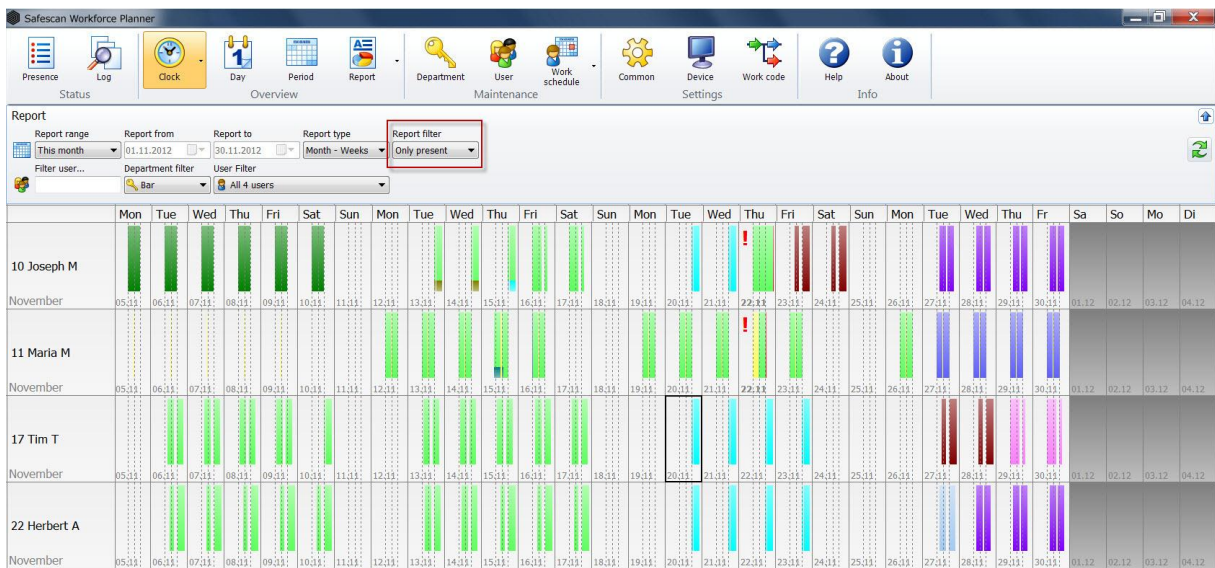
6.7.3 Report Filters



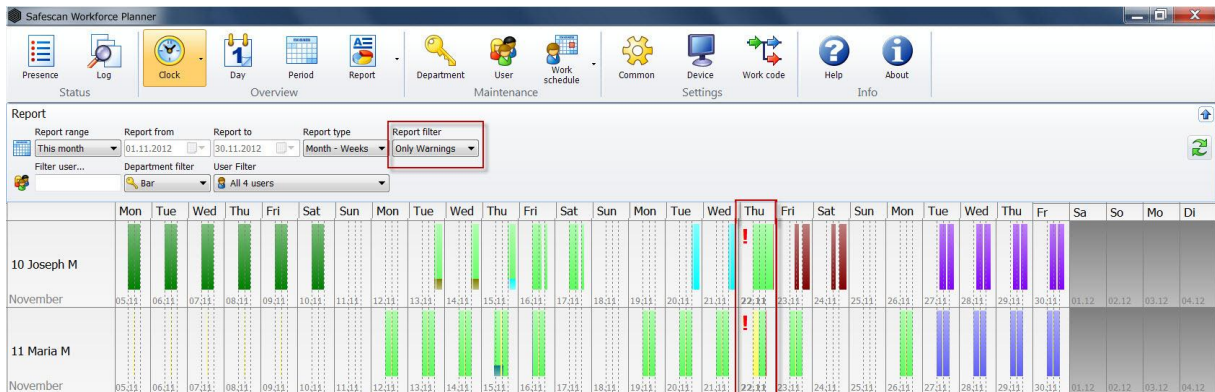
Everything = this view shows all employees that are registered in the system (even employees without any registered clock times).



Only present = this view only shows active employees with registered clock times for the selected time period.



Only Warnings = in this overview only employees with incorrect bookings for the selected time period are displayed.



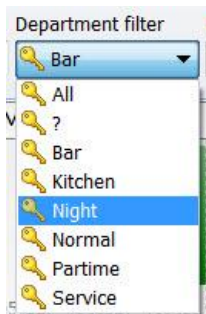
6.7.4 Freeform filter

Enter the first letter of the desired user in the freeform filter. All users starting with the same letter are displayed in the view. The more details you enter for the name, the more targeted your filter results will be.



6.7.5 Department filter

Select the desired department from the drop-down menu. All the employees in this department are displayed in the view and the User filter. You can also narrow the results by using the "User Filter".



6.7.6 User Filter

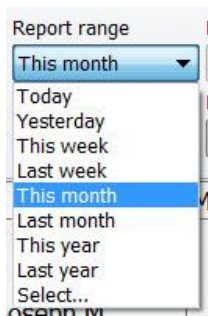
Select the desired user from the drop-down menu.



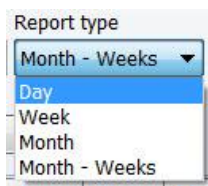
You can individually set this view by using the filter functions. The settings are saved the application is closed.

6.7.7 Setting the grid view

When selecting the view, select day, yesterday, this week, last week, this month, last month, this year, last year or select a desired time period



In combination with the report form: day week, month or month - week



and the report filter: all, only present or only errors



as well as the department filter or user filter,



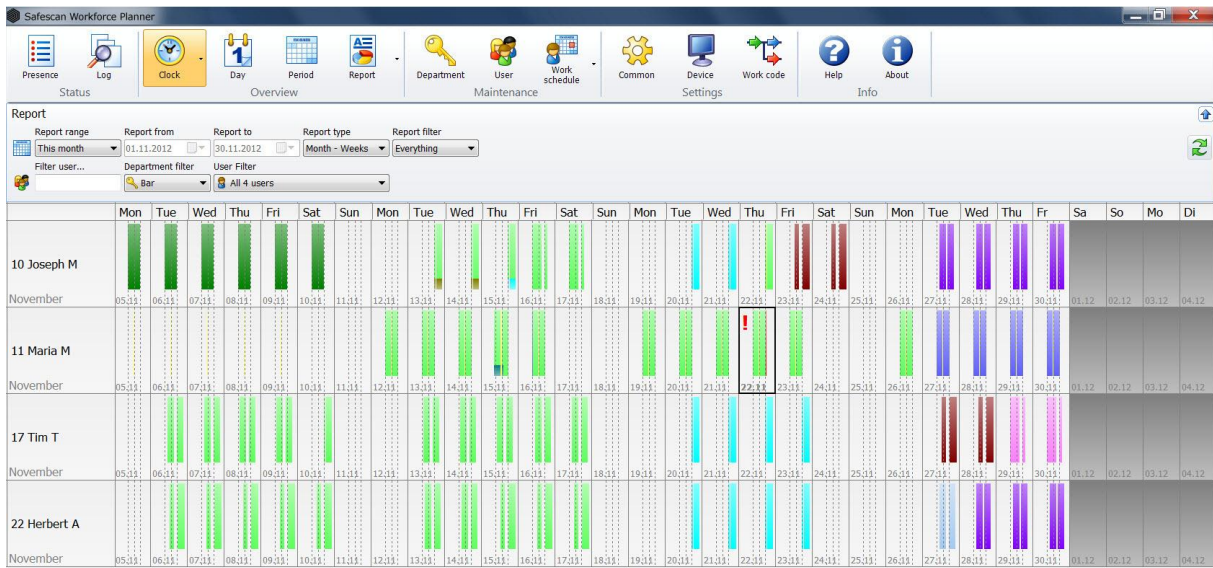
you can individually customise the grid view.

The default setting is the current *month* and the report type *Month* with *All events*, *All Departments* and *All Employees* selected. You can change this at any time

Note: The layout is individually customised and will only be displayed in your workplace.

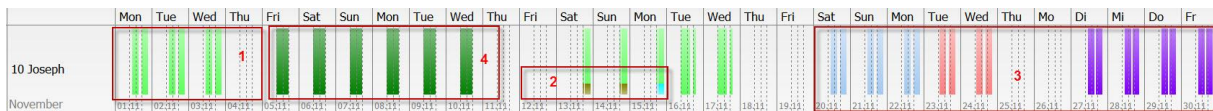
Example:

Report Chapter: this Month - report form: Month - Week - Report filter - All



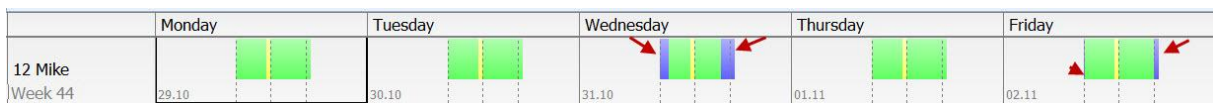
These settings show the current month for all employees. All users are listed by their User ID on the left of the grid as well as the name of the current month. In the title bar you can see each individual weekday Mon - Sun and the date in the cells.

In the grid you get an overview of the employee's worked hours. If you assign employees a work schedule or shift schedule this is displayed in blue when there are no more work hours for that day.



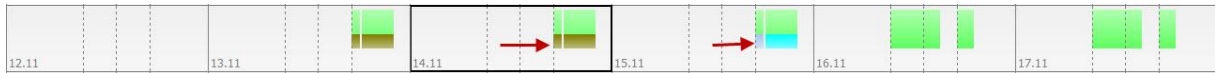
- 1 Fulfillment of a Work Schedule or Shift Schedule
- 2 Fulfillment of a Work Schedule or Shift Schedule with Work Code
- 3 Scheduled shift without fix Work Scheduler
- 4 Vacation

If the work schedule /shift schedule, however, is in accordance with the planned time, it is displayed in green. If the actual work time differs from the work schedule or shift schedule it is displayed with a blue background. (With shift planning, the colour for the plan is displayed).



<i>Planned</i>	14.11.2012 17:00 - 18:00 Geplant 14.11.2012 17:00 - 18:00 Inside 14.11.2012 17:00 - 18:00 Workcode 2 = Sick 14.11.2012 18:15 - 22:00 Geplant 14.11.2012 18:15 - 22:00 Inside 14.11.2012 18:15 - 22:00 Workcode 2 = Ziek	<i>Worked</i>	09:00 In 12:30 Out 13:00 In 17:30 Out Add new Copy schedule to attendant records
----------------	--	---------------	---

Project or work code: When, for example, a doctor's appointment, holiday or project work are booked with a work code, these are displayed on the grid with the corresponding colour of the work code. Additional information is available when you move the cursor over the clock time.



Tool Tip: All the information about a certain day is displayed in an information window when you move the cursor over the corresponding entry. When looking at a day in the future, such as in the work schedule /shift schedule, you will see which breaks are provided for. On a day with attendances, the work schedule /shift schedule as well as the actual attendance and, if required, work codes will be displayed. This means you have all the information for that day.

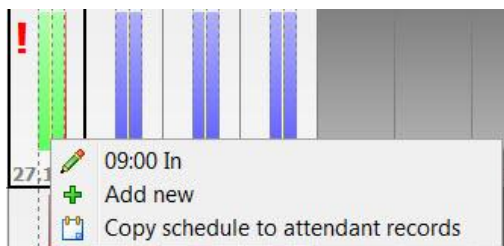
14.11.2012	17:00 - 18:00	Geplant
14.11.2012	17:00 - 18:00	Inside
14.11.2012	17:00 - 18:00	Workcode 2 = Sick
14.11.2012	18:15 - 22:00	Geplant
14.11.2012	18:15 - 22:00	Inside
14.11.2012	18:15 - 22:00	Workcode 2 = Ziek

Error messages are indicated in a cell with an exclamation mark denoting that an clock time is missing or there is an incorrect booking.



Click with the right mouse button on the day marked "error" and check whether it is due to an incorrect procedure or if an clock time has been forgotten. You can make immediate corrections by amending or adding an clock time. When adding, the date from the selected cell is adopted. The system is designed so that when a work schedule has been created, it is adopted in the work scheduled as a provisional addition to the clock time reservation, so that the calculation in the monthly report is complete. In the monthly report these forms of clock times are marked as corrected "by the system". In order to maintain a complete and error-free database, it is recommended that these error messages are corrected manually.

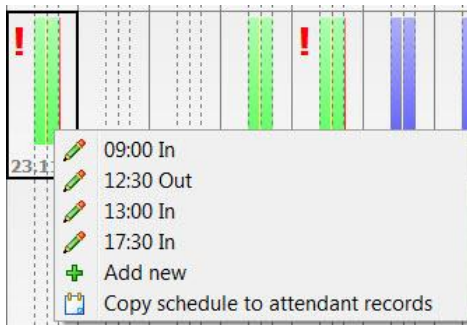
Example 1:



In this example, an employee forgot to log off on the time recording device. Since a work schedule exists for the employee, the system calculates the working hours until the finish time included in the work schedule and therefore indicates that the day was worked, but includes a warning note. The calculations in the monthly report will be correctly indicated and, on days when an an clock time is missing, there will be a note to state that this was logged by the system.

Please correct the bookings by adding an clock time, if you know the exact time of the addition or accept the work schedule with "copy schedule to attendant records".

Example 2:



In this example, the correct procedure was not properly complied with and a clock time was added twice in a row. Correct this directly in the cell by clicking the right mouse button on the entry to be corrected and change the status to out or ignore. Once the error is cleared, the clock time appears normally or, if you filter the report to show "Only Errors" it will disappear from view.

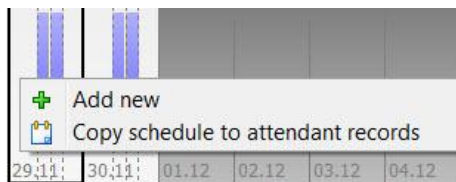
If you have set the report filter to "Only Errors", displayed in the overview are only employees that have errors in the attendance log for the selected time period. Once the errors are corrected, the bookings and employees are no longer displayed in the overview.

Note: If you have an empty screen, check the setting for the report filter. If this is set to "Only Errors", there are no bookings with errors in the selected time period. Change the filter settings to "All".

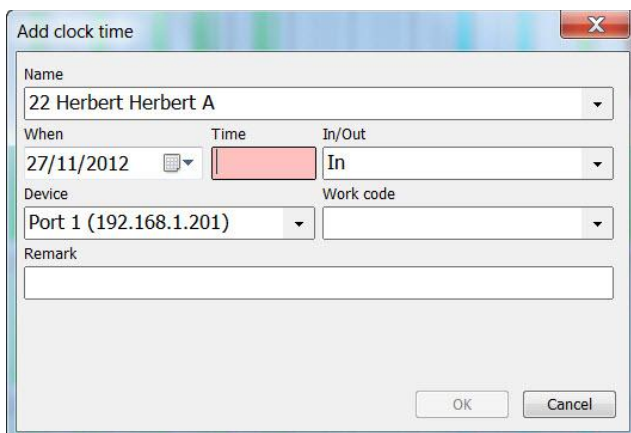
6.7.8 Add clock times in the grid view

To add entries in the grid overview, proceed as follows:

Click with the right mouse button in the field in which you want to add the entry and select "Add New".



The input screen is pre-set with all the data, so that you only have to input the time and the status IN/OUT and, optionally, add a work code. Of course you can adjust all the settings.

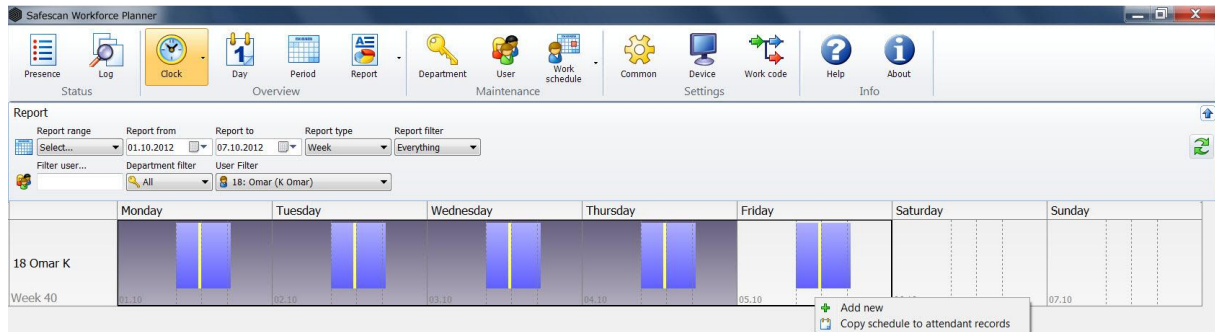


Finally confirm the clock time with OK to complete the process. The booking is accepted.

6.7.9 Add missing clock times

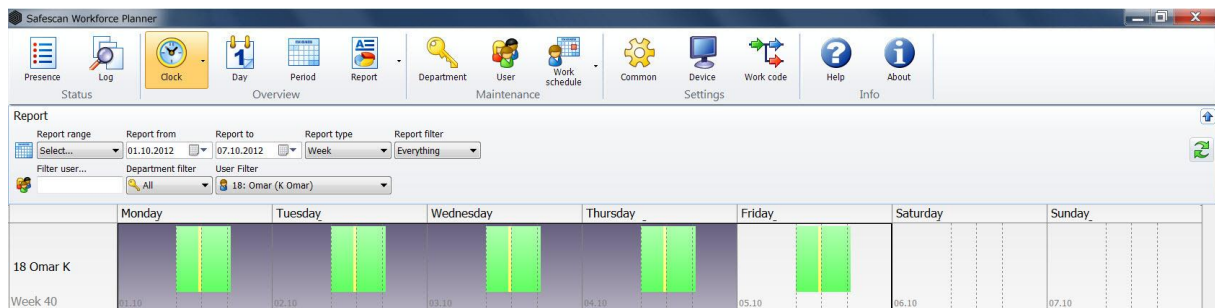
If you have to add a clock time retroactively for employees over several days or weeks, for example, due to illness or holiday or for lack of bookings at the time attendance device because of a lost ID card, you can do this with one click.

Select the time period for which you want to add clock times



and click with the right mouse button on the selected time period, select "copy schedule to attendant records", select the required work code, if needed, and confirm with OK.

The work schedule or shift schedule will now be copied and used to indicate attendance or illness, etc. This means you do not have to amend clock times individually.



6.7.10 Edit clock times in the grid view

To adjust or change an existing clock time, proceed as follows:

Select the cell in which you wish to adjust or change an clock time and click with the right mouse button. Select the clock time that you wish to change or adjust. Complete the modifications in the screen and complete the process with OK. The changes will now take effect.

6.7.11 Delete a clock time in the grid view

It is not possible to delete an entry. If there is a double entry or an incorrect booking that you cannot correct, set the status of this entry to ignore and create a new correct booking

Note: To protect employees, times recorded with a time attendance device cannot be corrected or cleared. To change a time, add a new clock time and set the "incorrect booking" to ignore. The clock time in the time attendance device will remain, but will no longer be calculated.

6.7.12 Export

It is not possible to export this view

6.7.13 Email

It is not possible to send this view by email

6.7.14 Print

It is not possible to print this view

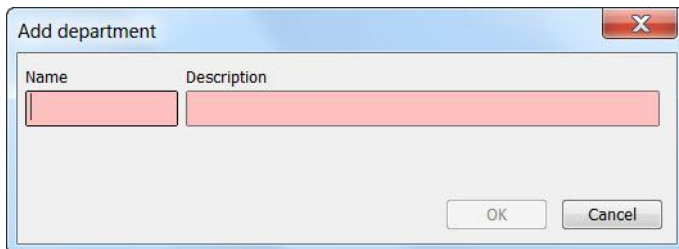
7 Administration

7.1 Department/Group


Departments and groups are used as selection and sorting criteria in Safescan Workforce Planner. They are used to administer users, as well as the departments/groups to which these users are assigned. These criteria can be used to select users and departments/groups in other parts of the program.

7.1.1 Creating a department/group


To create a new department or group, select and enter a name and description for your department or group. Red fields are mandatory and must be completed. Press OK to confirm your entry.



7.1.2 Changing a department/group

Highlight the department you want and select  to make the changes. Use OK to save the changes.

7.1.3 Deleting a department/group

Highlight the department you want to delete and click on  .

Note: The department can only be deleted if no users are connected to it.

7.2 User

Organising, amending or creating users has never been so easy. Create your users directly in the software and synchronise them with the time attendance device - all the information required from the time attendance device will be transferred. You do not need to go to the device for each newly created user to achieve this (except fingerprint).

ID	User name	Last name	Department	RFID No	Privilege	Status	Personnel no	Email	Phone	Work schedule	Vacation taken	Vacation planned	Remaining days of vacation	Work Time
24	Alex	D	Service		User	Active	200009	Alex@safescan.com	111		0	0	0	0
14	Anna	K	Service		User	Active	0910101	Anna@safescan.com	308		0	0	0	42
22	Herbert	A	Bar		User	Active	0606067	Herbert@safescan.c...	367		0	0	0	98
19	Ines	G	Parttime		User	Active	11116	No	No	40 impl	0	0	0	120
13	Jasmin	B	Service		User	Active	108746	Jasmine@safescan.c...	109		0	16	20	16
11	Maria	M	Bar		User	Active	124879	M@safescan.com	201	40 impl	0	0	36	264
15	Monica	S	Service		User	Active	0944803	No	No		0	0	0	0
20	Nicole	P	Service		User	Active	0812697	Nicole@safescan.com	169		0	0	0	0
18	Omar	K	Parttime		User	Active	11115	No	NO	40 impl	0	0	0	160
17	Tim	T	Bar		User	Active	091247	Tim@safescan.com	148		0	0	0	91
10	Joseph	M	Bar	1255696	User	Active	120921	J@safescan.com	190		48	0	160	54
12	Mike	V	Kitchen	12859646	User	Active	118059	Mike@safescan.com	140		0	16	-16	78
23	Joe	L	Kitchen	28965715	User	Active	799654	Joe@safescan.com	NO		0	0	0	0
21	Max	M	Kitchen	75894115	User	Active	0710109	Max@safescan.com	260		0	0	0	0
16	Ernie	C	Kitchen	98715692	User	Active	1023969	Ernie@safescan.com	123		0	0	0	0


The user data contains all the personal information that is necessary for time recording and processing as well as analysis. The name of the user, the user's personnel number and user number as well as the allocation of the working time model, the management of holiday and annual working hours are listed in this interactive screen. The interactive screen is divided into four Chapters that can be accessed by clicking on the appropriate tab:

- System data
- Personal Data
- Holiday
- Annual Working Hours

The data can be modified any time. Following the retirement of an employee, you can clear the data or set as inactive.

7.2.1 Creating users in the software

Note: Once a user ID's has been selected it cannot then be modified.

- Before you register a new user in the software, synchronise the software with the time attendance device to ensure that the data are identical in both.
- Click on  , the next available user ID and suggested department/group will be automatically displayed. Change the department, if desired, and accept the settings with OK. *Fields marked in red are mandatory.*

The 'Add user' dialog box contains the following fields and options:

- User ID:** A text input field containing the number '25'.
- Department:** A dropdown menu with a question mark '?' as the selected option. The dropdown list is open, showing the following options: '?', 'Bar', 'Kitchen', 'Night', 'Normal', 'Parttime', and 'Service'.
- Buttons:** 'OK' and 'Cancel' buttons are located at the bottom right of the dialog.

- You can complete the user information, set privileges (user, admin, etc.), set the status to active and, if your time attendance device is equipped with an RFID reader, add the RFID card number.

- Confirm the applied input with  or go to the next input screen.

Note: Please be aware that the following information will be synchronised with the time recording device:

- User ID
- User name
- Privileges
- Status
- RFID No.
- Password

Once you have input everything and the modifications have been completed, synchronise the software with your time attendance device. The new user may now log on and off on the time attendance device with the registered RFID card or user ID and password automatically assigned by the software (see **Chapter 7.2.3**).


7.2.2 Fingerprint

If you have a time attendance device that only supports fingerprints, the user can log in and out using the user ID and password, which are assigned automatically by the software (see below for further information in **Chapter 7.2.3** "Password"). Save the user's fingerprint at a later time by following your time attendance device instructions for registering new users.

7.2.3 Password

You can assign a password to a user or change an existing password at any time.

- Select the user for whom you wish to create or change a password
- Click on change password

- Enter a new password and accept by clicking OK
- Save your entries with  in the user mask.

7.2.4 Create users on the device


Note: Selected user IDs cannot be changed later.

- Before you register a user on the time attendance device, synchronise the software with the time attendance device to ensure that the data are identical in both.

- Follow your time attendance device instructions for registering new users.
- Synchronise the software with the time attendance device again.
- Complete the user information and synchronise the completed information with the time attendance device.


7.2.5 Edit users

User data can be modified at any time. Double click the user for whom you want to make changes.

The edit field will open. Make additions or change the user information and then save it with .

Synchronise the software with the time attendance device after you have made changes to one or more users so that the data are identical in both.

7.2.6 Deleting users

- To delete a user, highlight the user in the list and click on  or
- Double click on the user and put the user in "Inactive" or "Delete" in status. (In "Inactive" the user ID will not be deleted and the user's data will no longer be processed or appear in any summary. In "Delete" the user will also be deleted on the time attendance device at the next synchronization).

7.2.7 System data information

User name: Enter a user name.

User ID: Enter the number of the employee's ID card. This can consist of up to nine digits. The user ID must be identical to the user's ID on the time attendance device.

RFID no.: Enter the ID number of the transponder that has been assigned to the user.

It is not mandatory to enter this. There are ways of transferring the transponder ID to the employee master data.

- The RFID no. is entered into the "System data" field. After synchronization with the time attendance device, all user data for the function, including the transponder ID, is sent to the time attendance device.
- The RFID no. is entered when a user is set up on the time attendance device and is sent to the software during synchronization. The user data it is then transferred to the system.

User privileges: Use the user status to control the granting of rights on the time attendance device and in the software:

- **User:** a standard user, who can only use the commonly available functions on the time attendance device.
Users only see their own time entries in the software and cannot make changes.
- **Enroller:** Employee who has permission to log other users onto the time attendance device. Enrollers only see their own time entries in the software and cannot make changes.
- **Administrator:** Employee who has administrative rights and access to everything. Can make changes in the software.
- **Supervisor:** Employees with all rights on the device and in the software.

Int. phone: You can save the employee's internal telephone number if you wish.

Duty roster: Select a duty roster from the drop-down field from which the user is to be assigned.

Changing your password: Assign a password. When you create users via the software, the software automatically assigns a password that matches the user ID no. For example, user ID 22 = password = 22. The user can use this password/PIN to log into the time attendance device.

Add image: Add a photo of the user.

Delete image: Delete the photo of the user.

7.2.8 Personal Data

In the "Personal information" tab you can enter more information about individual employees of the company. With the exception of the personnel number, this information is of no significance to the actual time and attendance.

Name and address: Save the personal data of the employee, such as private address, telephone number, etc.

These fields are not mandatory and can be left blank.

Personnel no.: Enter the employee's personnel number. This can consist of up to nine digits. The personnel number is shown on the monthly report.

Note: Please enter the date of birth and starting/leaving date in the dd.mm.yyyy format in the entry field.

7.2.9 User – Vacation

To calculate holiday times in the reports, you require some basic information. This is entered in the input screen. When all the data are complete, the global overview displays the respective current accrued holiday for the employees and the planned holiday, if a holiday is planned.

Note: Holidays must be entered in hours!

Enter the data as follows:

Existing employees usually have accrued holiday. This can be entered in the field "accrued from last year". Convert days to hours (e.g. 4 days * 8h = 32 hours) using the number of working hours per day for your business.

The screenshot shows the 'Safescan Workforce Planner' application window. The 'User' tab is active, displaying a table with user details for 'Joseph M. Bar' (ID: 10, Personnel no: 120921, Status: Active). Below the table, the 'Vacation' section contains several input fields for configuring vacation settings.

Vacation			
From last year	Correction	Remaining vacation in hours	
8	0	8	
Number of vacation in hours per Special leave I	Special leave II	Total hours of vacation for the current year	
200	0	200	
Hours taken		Total this and last year Total t/m nu	
48	0	208	
Hours planned		Hours remaining	
		160	

In the field "Correction" you can retroactively include plus or minus days (**in hours**) to correct the accrued holiday from the last year.

Vacation	
From last year	Correction
8	0

For example, the employee took some holiday during the last year that was not entered in the system.

Now enter the current annual holiday balance of the employee (in hours).

If during the current year your employee is entitled to extra holiday, e.g. own wedding, maternity vacation, etc., you can enter this under Extra Vacation I and II.

Vacation in hours per year	Special leave I
200	0

The fields "holiday taken"," planned holiday" and "holiday remaining" are calculated by the system after you have entered or planned holiday times (**Chapter 9. Planning**).

7.2.10 User - Annual Working Hours


The annual working hours give scope for organising a flexible work schedule for employees. Enter the target annual working hours. All further calculations are performed by the system based on the work hours posted for the employee. The overview shows you the current status of the hours remaining for the current year at all times.


Note: The annual working hours must be entered as hours!

7.2.11 View settings

Set up the view of employees in the desired way and according to your needs by right-clicking on the title bar and clicking the options 'on' or 'off'. Any new columns are placed at the end and can be moved by dragging and dropping them in the desired location. The settings will be saved once the program is closed.


7.2.12 Export views as a CSV file

You can export the current view  as a CSV file that can then be processed further in Excel or a similar program that can read CSV files. The CSV file format describes the structure of a text file that can save or exchange data or lists with a simple structure.


- Select the view that you want to export.
- Click on the "Export CSV" icon .
- Rename the export file and select the directory created for CSV export.
- Click on "Save".
- Click on "OK". The data is exported to the selected directory.

7.2.13 Send report by email

The view you created can be sent by email at any time.

When you click on  the current overview will be saved as a PDF, which can be attached to an email that you can subsequently edit and send.


7.2.14 Print

The current view can be  at any time. The exact view you set will be printed.

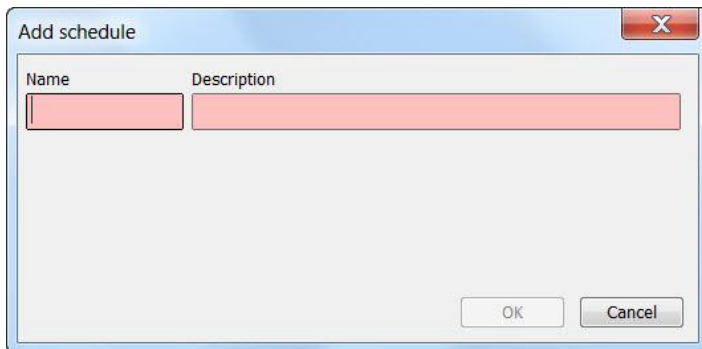
7.3 Work schedule/ Weekly work schedule

Create work schedule /weekly work schedules for the employees that have regular duties. The work schedule /weekly work schedules can be individually assigned to a user or to an entire group/department. The work schedule /weekly work schedules are processed with the monthly report and serve as the basis for calculating working hours and overtime as well as for monitoring early leave and late arrivals.

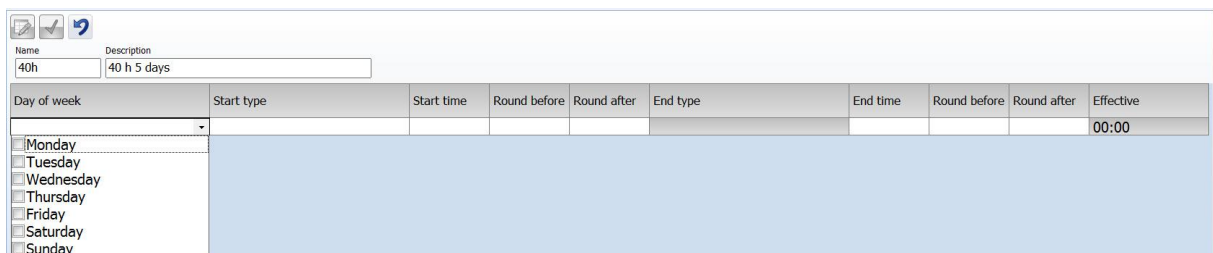
7.3.1 Create a work schedule with fixed working hours

Click on the  in the screen, type in the name and description for the work schedule and then confirm with OK.

Note: Fields marked in red are mandatory.






From the drop-down menu "weekdays", select the desired days (more than one day can be selected).






Day of week	Start type	Start time	Round before	Round after	End type	End time	Round before	Round after	Effective
Monday									00:00
Tuesday									
Wednesday									
Thursday									
Friday									
Saturday									
Sunday									

Then under start type, select "IN". Enter the time for the start time (input format settings follow those for your country, e.g. 09:00) and the end time. (See example).




Name: 40h Description: 40 h 5 days

Day of week	Start type	Start time	Round before	Round after	End type	End time	Round before	Round after	Effective
Mon;Tue;Wed;Thu;Fri	In				Out				00:00
	Break incl Excl break Break impl								


Name: 40h Description: 40 h 5 days

Day of week	Start type	Start time	Round before	Round after	End type	End time	Round before	Round after	Effective
Mon;Tue;Wed;Thu;Fri	In	09:00			Out	17:30			00:00


Name: 40h Description: 40 h 5 days

Day of week	Start type	Start time	Round before	Round after	End type	End time	Round before	Round after	Effective
Mon;Tue;Wed;Thu;Fri	In	09:00			Out	17:30			08:30 * 5
Monday;Tuesday;Wednesday	Break impl	12:30			Break return	13:00			00:30 * 5
Monday									40:00
Tuesday									
Wednesday									
Thursday									
Friday									
Saturday									
Sunday									




Confirm the entries by clicking on .

7.3.2 Create a work schedule with flexible hours (only break allowance).

If your employees have no fixed working hours, but you still want to schedule an automatic break for the workday, you can also set this up as a work schedule.

Click on  to create a new work schedule.

Select the desired days as well as the implied breaks and enter the start and end times.

Name: Break impl Description: Break impl

Day of week	Start type	Start time	Round before	Round after	End type	End time	Round before	Round after	Effective
Mon;Tue;Wed;Thu;Fri	Break impl	12:30			Break return	13:00			00:30 * 5 -02:30

An employee with this work schedule has flexible working hours with an automatic break allowance.

7.3.3 Rounding

With the rounding of clock-in and clock-out hours, you can set working hours to commence at a fixed time. This means that overtime caused by arriving early (e.g. 5 minutes every day before the start of working hours) will be avoided.

From the drop-down menu, select the desired time period (from 0 - 60) for "round before" and "round after" for both the start time and end time.

Round before	Round after
0	0
1	1
5	5
10	10
15	15
30	30
60	60

Day of week	Start type	Start time	Round before	Round after	End type	End time	Round before	Round after	Effective
Mon;Tue;Wed;Thu;Fri	In	09:00	15	5	Out	17:30	5	15	08:30 * 5
Mon;Tue;Wed;Thu;Fri	Break impl	12:30			Break return	13:00			00:30 * 5 40:00

If, for example, you select 10 before the set start of the working time, all clock times entered 10 minutes prior to this time will be assigned a calculated "clock-in" at the set time. This means the employee does not receive 10 minutes extra work time. The same goes for "round after".

However, all clock in entered 15 minutes before the start of work time set with round before 10 will count the time until 09:00 as overtime (15 minutes).

Note: Rounding is not included in work code calculations. There, the actual worked time is taken into account.

7.3.4 Automatic break allowance

With Safecan Workforce Planner you have the possibility to directly deduct fixed breaks that your employees must take.

For example, there is no need to clock-in or out for a lunch break as it will be automatically logged by the system.

- Create a weekly work schedule as described above *in Chapter 7.3.1*.

Day of week	Start type	Start time	Round before	Round after	End type	End time	Round before	Round after	Effective
Mon;Tue;Wed;Thu;Fri	In	09:00			Out	17:30			00:00

- In the second row, enter the days when the break will be automatically logged.
- Then select break implied and enter a start and end time; rounding is not necessary here. If the breaks do not occur at the same time every day, you can set this as required.

Day of week	Start type	Start time	Round before	Round after	End type	End time	Round before	Round after	Effective
Mon;Tue;Wed;Thu;Fri	In	09:00			Out	17:30			08:30 * 5
Monday;Tuesday;Wednesd	Break impl	12:30			Break return	13:00			00:30 * 5 40:00

- Confirm the entries by clicking on .

When all the information has been entered, you will receive an overview of the current work schedule.



Break implied = includes breaks that are automatically logged. The break time is automatically logged and there is no need to clock-in or out on the time recording device.

Break incl. = If you select "Break included" the total working time you have entered includes breaks (in a 40 hour week with a one hour lunch break, an additional 5 hours are added to the 40 hours as breaks. The total weekly working hours in this case amount to 45 hours). If a break time is checked-in at the time attendance device, it will be included in the calculation and the employee, in this case, will have a minus.

Break excl = in the specified time period breaks must be clock-in and out as normal at the time attendance device.


7.3.5 Editing/changing a duty roster

The weekly work schedule can be adapted/changed at any time.

- Highlight the weekly work schedule that you want to change and click on  or double click directly on the weekly work schedule that you want to change.
- The editing field opens. Complete or change, as described in **Chapter 7.3.1/7.3.2 or 7.3.3**, then with .


Your changes are immediately taken into account in the calculations.


7.3.6 Deleting the duty roster

- To delete a weekly work schedule, select it in the list and click on .

Note: You can only delete a weekly work schedule if it has no link to a user.


7.3.7 Export overviews as a CSV file

You can export the current view  as a CSV file that can then be processed further in Excel or a similar program that can read CSV files. The CSV file format describes the structure of a text file that can save or exchange data or lists with a simple structure

- Select the view that you want to export.
- Click on the "Export CSV" icon .
- Rename the export file and select the directory created for CSV export.
- Click on "Save".
- Click on "OK". The data is exported to the selected directory..

7.3.8 Send report by email

The view you created can be sent by email at any time.

When you click on  the current overview will be saved as a PDF, which can be attached to an email that you can subsequently edit and send.

7.3.9 Print



The current view can be printed out at any time with

8 Planning

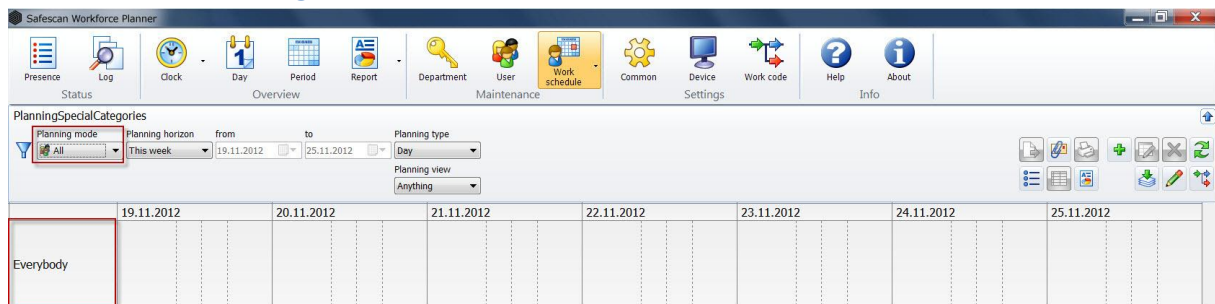
8.1 Planning Grid

You can schedule your weekly/monthly or holiday planning quickly and easily in the planning grid with the help of templates. You can print an operational schedule that you can give or send to your employees by email.

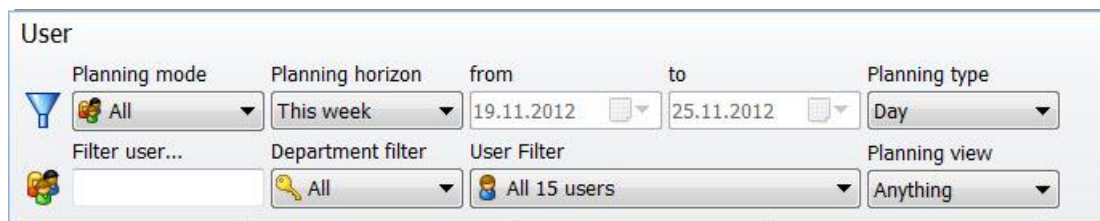
The planning grid provides you with a clear overview of all the employees (showing the work schedule or shift schedule) and their work plan or holiday plan. You can make adjustments quickly and easily as and when necessary.

All schedules are transferred and displayed in the clock grid.

8.1.1 Creation of the grid view

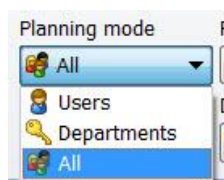


Filter:



8.1.2 Planning Group

In the planning group, you have a choice between: User, Department or All



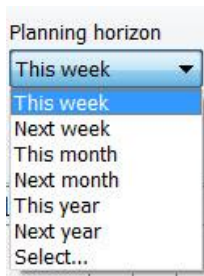
Under **User**, a planning entry is listed for the selected user (e.g. shift)

Under **Department**, a planning entry is listed for all employees in the selected department (e.g. team meeting, etc.)

Under **All**, a planning entry is listed for all employees (e.g. public holiday, holiday or business trip, etc.)

8.1.3 Planning Period

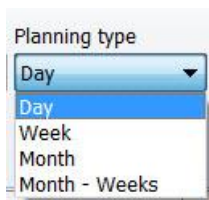
You can view and edit all the ranges of dates within the planning period in the planning grid.



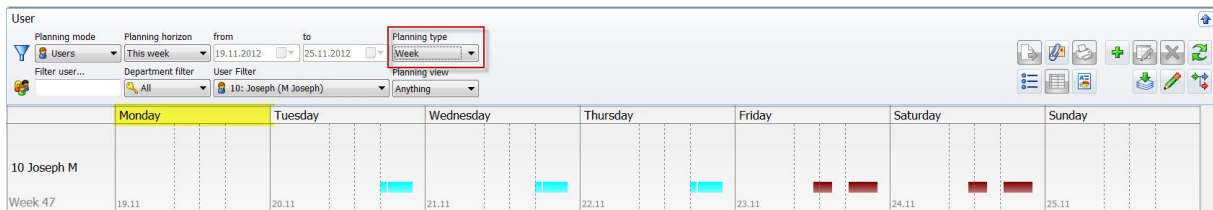
Note: Planning in the past must be entered through “Select” and the desired period must be specified

8.1.4 Planning Type

Under planning type, you set up the desired grid view.



Day = Date e.g. 9.10.2012



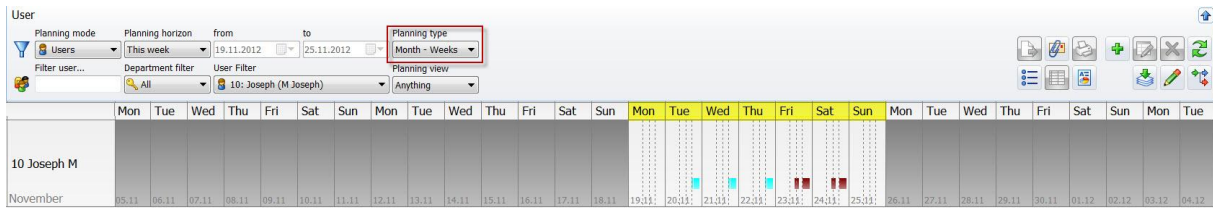
Weeks = weekdays are visible in the title bar, calendar weeks in the user field, as well as the date in the cell



Months = displays the whole of the current month in which the specified time period is visible in the report Chapter. Days are visible in the title bar, months in the user field and the date in the cell



Month - Week = in this view, in the same way as for month view, the current month as well as weekdays are shown in the title bar.



8.1.5 User filter

This filter is only active when you have selected the planning group "Users". You can use the user filter to enter a name to restrict the number of users displayed.

8.1.6 Department filter

This filter is only active when you have selected the planning group "Users". If you select a department, in the grid view, you see all the employees allocated to this department.

8.1.7 User ID Filter

This filter is only active when you have selected the planning group "Users". The User ID filter lists all employees by user ID (also inactive users, but they cannot be included in the planning).

8.1.8 Icons:

Icons for list view



Icons for grid view



Note: If the icons are grey, these options are inactive in the current view



Export data - only in list view (not possible in the grid overview)



View or send reports by email



Print the view - only in list view (not possible in the grid overview)



Add plan



Edit plan



Clear plan



Refresh



Switch to list view



Switch to grid view



Import public holidays



Open and close the list templates for work time plans and vacation time plans



Open and close the work code legend

8.1.9 Structure of the planning grid

The planning view consists of an **information bar** on the left, where the settings for the planning group filter are displayed, and a title bar at the top, where the date for the planning period is displayed.

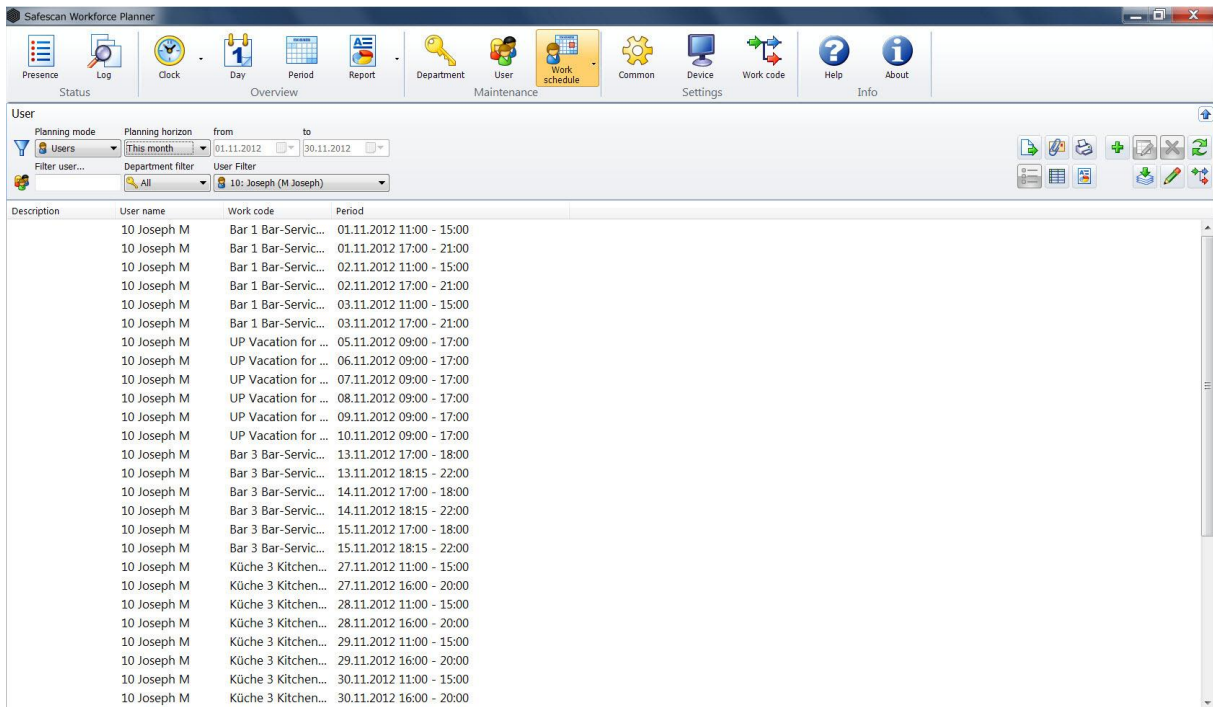


The cells 19:11 contain fine lines that act as support for the daily routine view (9:00/13:00/17:00)

The screenshot shows the Safescan Workforce Planner interface. At the top, there is a menu bar with icons for Presence, Log, Clock, Day, Period, Report, Department, User, Work schedule, Common, Device, Settings, Work code, Help, and Info. Below the menu bar is a 'User' section with filters for Planning mode (Users), Planning horizon (Next month), from (01.12.2012) to (31.12.2012), Planning type (Month - Weeks), Filter user..., Department filter (All), User Filter (10: Joseph (M.Joseph)), and Planning view (Anything). The main area is a planning grid with columns for days of the week (Mon, Tue, Wed, Thu, Fri, Sat, Sun) and rows for users. The first row is for '10 Joseph M' and the second row is for 'December'. The grid cells contain vertical lines representing work schedules. The time slots are labeled from 03:00 to 31:00 in 1-hour increments.

8.1.10 Planning - List View

In the planning list view, all entries are listed per employee and they can also be edited.



8.1.11 Planning with time plans

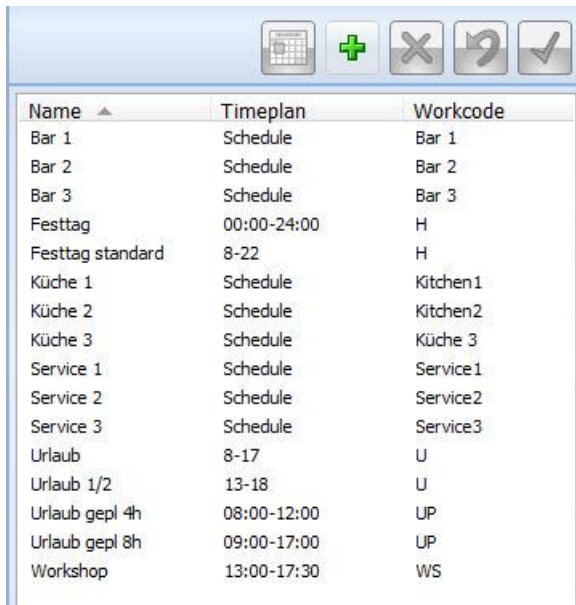
You can create time plans for the future planning of employees

The time plans are templates that will simplify the scheduling of employees and they are flexible, in contrast to the work schedules, in which an employee is permanently assigned. You can add a shift you require or plan a day off at any time.

When you have created the necessary time plans, you can move employees to the desired time point by using the 'drag and drop' method.

8.1.12 Create time plans


Open the time plan window with  here you can create templates for planning.



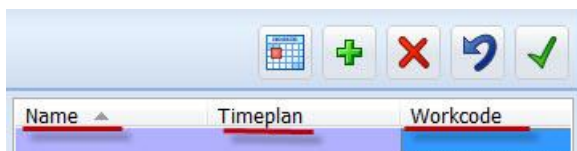
Name	Timeplan	Workcode
Bar 1	Schedule	Bar 1
Bar 2	Schedule	Bar 2
Bar 3	Schedule	Bar 3
Festtag	00:00-24:00	H
Festtag standard	8-22	H
Küche 1	Schedule	Kitchen1
Küche 2	Schedule	Kitchen2
Küche 3	Schedule	Küche 3
Service 1	Schedule	Service1
Service 2	Schedule	Service2
Service 3	Schedule	Service3
Urlaub	8-17	U
Urlaub 1/2	13-18	U
Urlaub gepl 4h	08:00-12:00	UP
Urlaub gepl 8h	09:00-17:00	UP
Workshop	13:00-17:30	WS

8.1.13 Add a time plan

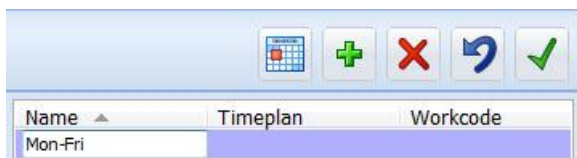


Select  to add a work schedule.

Give the time plan a name, time plan and work code.



- You can type the name directly into the cell.



- To add to a time plan, enter the time directly into the cell. With this version you may not include any breaks.



Note: With a time plan you must either post a time for example 09:00-17:30 or use a time plan template.

- or open  a time plan template, in which you can also add breaks.

Day of week	Start type	Start time	Round ...	Round ...	End type	End time	Round ...	Round ...	Effective
									00:00

Select the desired day (multiple selections possible)

Select the start type; the end type is adjusted automatically.

Enter the start time and end time.

For rounding before or rounding after specify the time in minutes before or after the start/end time that the clocked work time is not to be counted as overtime (minus work time).

Specify the desired break requirements. For the start type, select the desired break type (including break incl./No break/break impl.)

Day of week	Start type	Start time	Round before	Round after	End type	End time	Round before	Round after	Effective
Tue;Wed;Thu;Fri;Sat	In	12:00			Out	22:00			10:00 * 5
Tue;Wed;Thu;Fri;Sat	Break impl	15:00			Break return	17:30			02:30 * 5
									37:30

For break incl. the weekly working hours will be calculated including the breaks. An employee with this work schedule does not need to clock-in or out for breaks on the time recording device. The time is calculated on an ongoing basis.

Day of week	Start type	Start time	Round before	Round after	End type	End time	Round before	Round after	Effective
Tue;Wed;Thu;Fri;Sat	In	12:00			Out	22:00			10:00 * 5
Tue;Wed;Thu;Fri;Sat	Excl break	15:00			Break return	17:30			02:30 * 5
									37:30

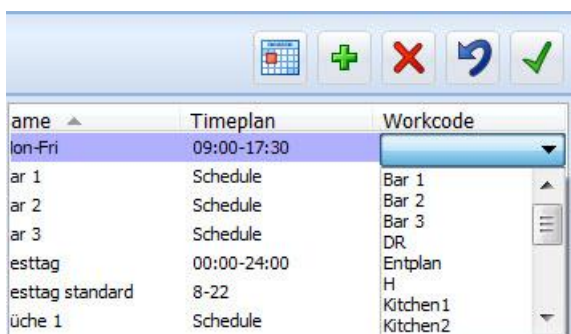
With no break, break time must be clock-in and out on the time attendance device during the specified time period. In this case, it is recommended that you use round before and round after.

Day of week	Start type	Start time	Round before	Round after	End type	End time	Round before	Round after	Effective
Tue;Wed;Thu;Fri;Sat	In	12:00			Out	22:00			10:00 * 5
Tue;Wed;Thu;Fri;Sat	Break incl	15:00			Break return	17:30			-
									50:00


With break impl., break time is automatically included. An employee does not need to clock-in or out for breaks on the time recording device.

8.1.14 Add work codes

For a good visual overview and proper mapping of selected schedules, connect them with a work code (previously created under "work codes") to the selected time plans.




Name ▲	Timeplan	Workcode
Bar 1	Schedule	Bar 1
Bar 2	Schedule	Bar 2
Bar 3	Schedule	Bar 3
Holiday	00:00-24:00	H
Holiday stand	8-22	H
Kitchen 1	Schedule	Kitchen1
Kitchen 2	Schedule	Kitchen2
Kitchen 3	Schedule	Küche 3
Service 1	Schedule	Service1
Service 2	Schedule	Service2
Service 3	Schedule	Service3
V planned	09:00-17:00	UP
v planned 1/2	08:00-12:00	UP
Vacation	8-17	U
Vacation 1/2	13-18	U
Workshop	13:00-17:30	WS

Confirm these inputs by clicking  .


When you have created all the required time plans, you can now assign the employees by using the 'drag and drop' method. See **Chapter 8.1.17**.

Delete a time plan

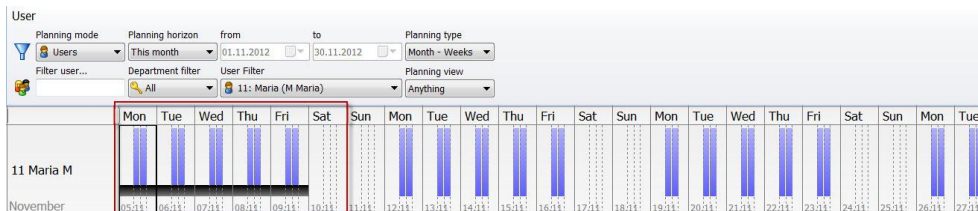
To clear a time plan, select it and click on  . The time plan will be cleared.

Note: The plans created on a deleted time plan are retained by the employees and, if no longer required, must be deleted directly with the user.

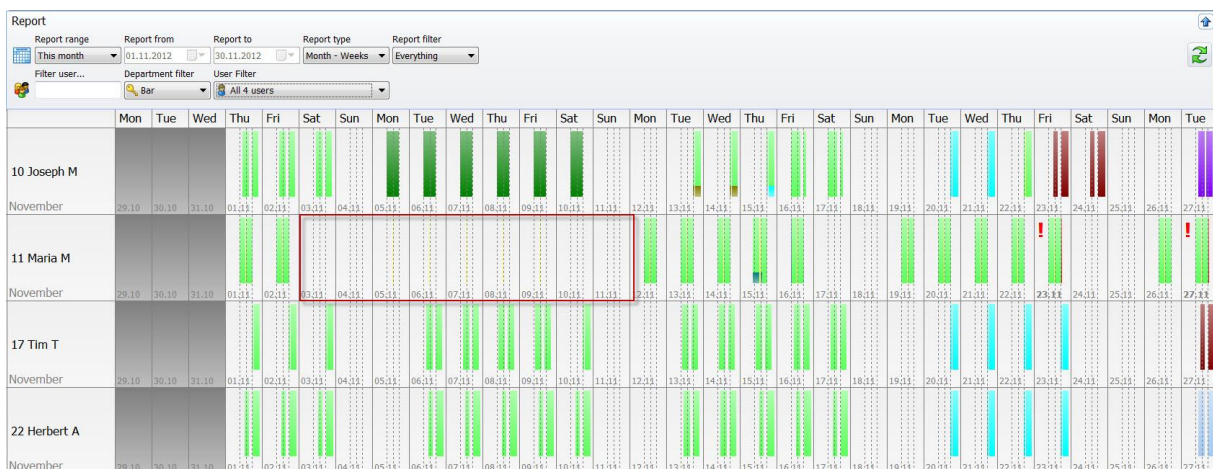
8.1.15 Employees with a work schedule to, temporarily replan

- If you want to or need to provide employees with a permanent work schedule for a certain time period, whether as a holiday replacement or sprinter, etc., there is no need to change the entire work schedule for the employee. You can use the work code * "Replan" to create a time plan and replace the work schedule for the required time and plan a new work time.
- Select the employee and the required time period and 'replan' these by clicking  and adding a new schedule with the work code "REPLAN" (To create this work code see **Chapter 11.2**)


You will see the colour code chosen for this work code in the time period selected. There is no work schedule for this employee anymore and the employee is no longer visible in the clock grid.



Clock grid



Now reschedule this employee!

Note: Replanning of work schedules must be carried out by clicking  (add). This function cannot be defined as a time plan template.

8.1.16 Inserting and planning with time plans

When you have created the necessary schedules, you can move employees to the desired time point using the 'drag and drop' method.

Select the time period or the member of staff and drag the time plan onto the selected area.

Individual Employees

The screenshot shows the Safescan Workforce Planner interface. The main window displays a weekly planning grid for four employees: Joseph M (ID 10), Maria M (ID 11), Tim T (ID 17), and Herbert A (ID 22). The grid covers the period from 03.12 to 09.12. A red arrow points from the 'Bar 3' entry in the right-hand list to a specific time slot in the grid for Joseph M.

Name	Timeplan	Workcode
Bar 1	Schedule	Bar 1
Bar 2	Schedule	Bar 2
Bar 3	Schedule	Bar 3
Holiday	00:00-24:00	H
Holiday stand	8-22	H
Kitchen 1	Schedule	Kitchen1
Kitchen 2	Schedule	Kitchen2
Kitchen 3	Schedule	Küche 3
Service 1	Schedule	Service1
Service 2	Schedule	Service2
Service 3	Schedule	Service3
v planned	09:00-17:00	LP
v planned 1/2	08:00-12:00	LP
Vacation	8-17	U
Vacation 1/2	13-18	U
Workshop	13:00-17:30	WS

Select an overview of the planning data you want to add.

The 'Add Planning' dialog box is shown. It has a 'Description' field, a 'Work code' dropdown menu set to 'Bar 3', and a list of planning data. The list contains the following entries:

- 04.12.2012 17:00 - 18:00: 10 Joseph M
- 04.12.2012 18:15 - 22:00: 10 Joseph M
- 05.12.2012 17:00 - 18:00: 10 Joseph M
- 05.12.2012 18:15 - 22:00: 10 Joseph M
- 06.12.2012 17:00 - 18:00: 10 Joseph M
- 06.12.2012 18:15 - 22:00: 10 Joseph M
- 07.12.2012 17:00 - 18:00: 10 Joseph M
- 07.12.2012 18:15 - 22:00: 10 Joseph M

Buttons for 'OK' and 'Cancel' are visible at the bottom right.

Confirm this with OK if you want to overwrite the plan.

Several employees simultaneously

The screenshot shows the Safescan Workforce Planner interface. The main grid displays planning data for four users: Joseph M, Maria M, Tim T, and Herbert A. The grid is organized by day (Monday to Sunday) and week (Week 49). A red arrow points from the 'Bar 2' entry in the right-hand pane to a specific time slot in the grid.

User	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
10 Joseph M							
Week 49	03.12	04.12	05.12	06.12	07.12	08.12	09.12
11 Maria M							
Week 49	03.12	04.12	05.12	06.12	07.12	08.12	09.12
17 Tim T							
Week 49	03.12	04.12	05.12	06.12	07.12	08.12	09.12
22 Herbert A							
Week 49	03.12	04.12	05.12	06.12	07.12	08.12	09.12

Select an overview of the planning data you want to add.

The 'Add Planning' dialog box is shown. The 'Description' field is empty. The 'Work code' is set to 'Bar 2'. The list of planning data items is as follows:

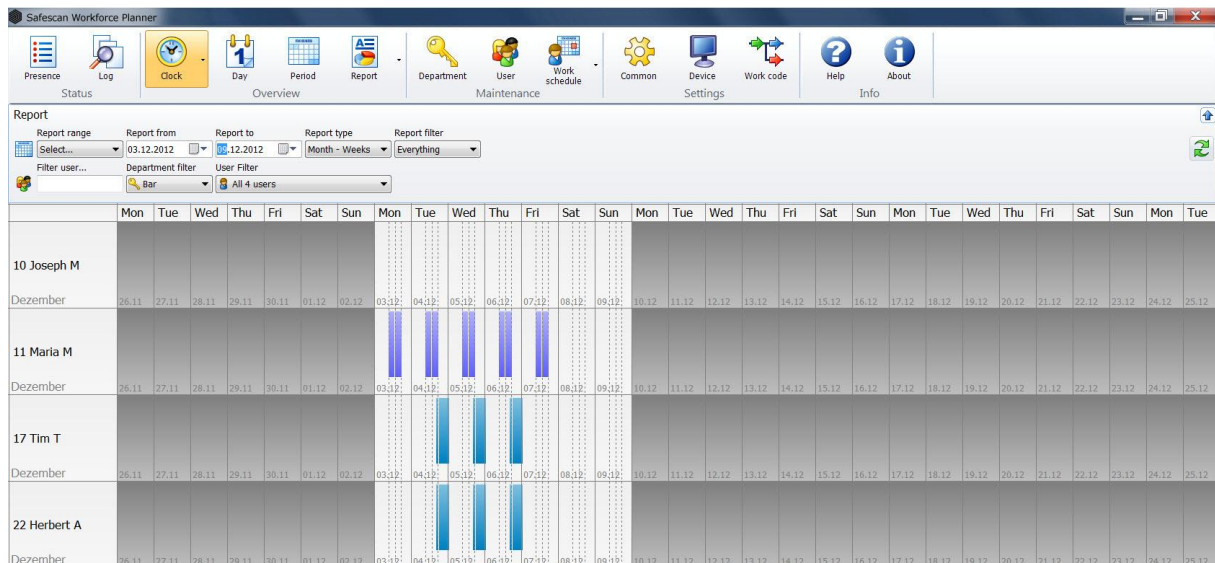
- 05.12.2012 16:00 - 17:30: 17 Tim T
- 05.12.2012 18:00 - 06.12.2012 00:30: 17 Tim T
- 06.12.2012 16:00 - 17:30: 17 Tim T
- 06.12.2012 18:00 - 07.12.2012 00:30: 17 Tim T
- 04.12.2012 16:00 - 17:30: 22 Herbert A
- 04.12.2012 18:00 - 05.12.2012 00:30: 22 Herbert A
- 05.12.2012 16:00 - 17:30: 22 Herbert A
- 05.12.2012 18:00 - 06.12.2012 00:30: 22 Herbert A

Confirm this with OK if you want to overwrite the plan.

The screenshot shows the Safescan Workforce Planner interface after the 'Add Planning' dialog box has been confirmed. The main grid displays the updated planning data for the four users. The 'Bar 2' entry is now visible in the grid, indicating that the plan has been overwritten.

User	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
10 Joseph M							
Week 49	03.12	04.12	05.12	06.12	07.12	08.12	09.12
11 Maria M							
Week 49	03.12	04.12	05.12	06.12	07.12	08.12	09.12
17 Tim T							
Week 49	03.12	04.12	05.12	06.12	07.12	08.12	09.12
22 Herbert A							
Week 49	03.12	04.12	05.12	06.12	07.12	08.12	09.12

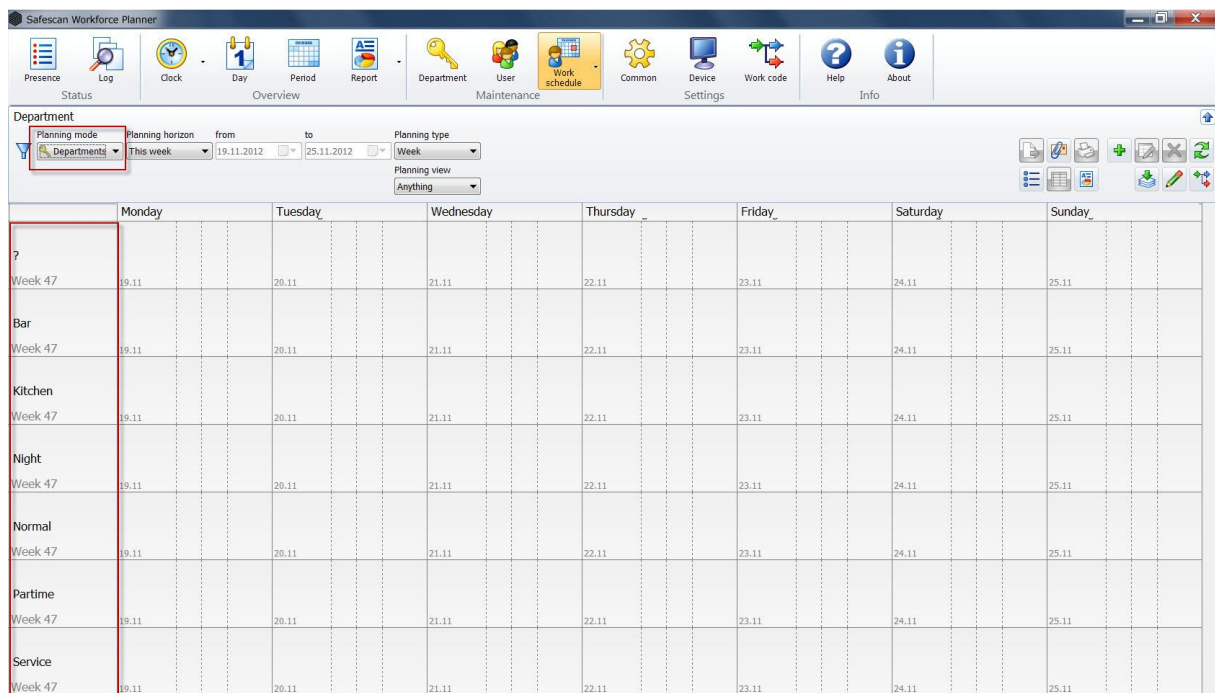
After planning, this assignment will be in the clock grid and added as the "work schedule".



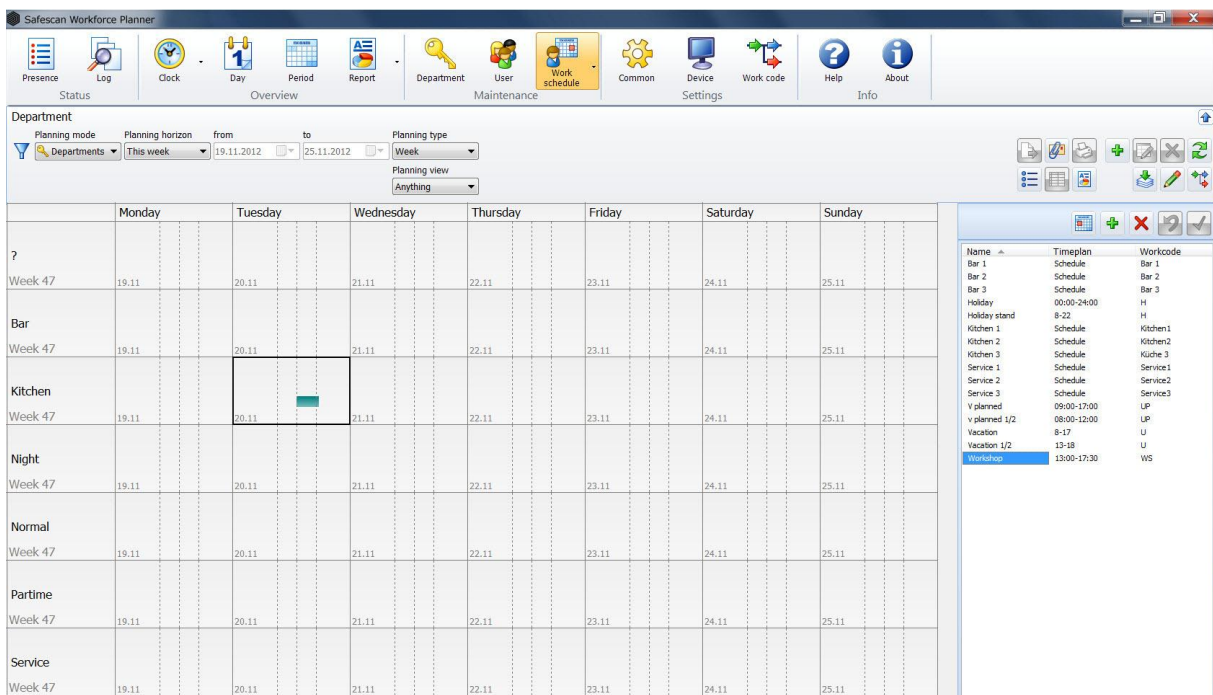
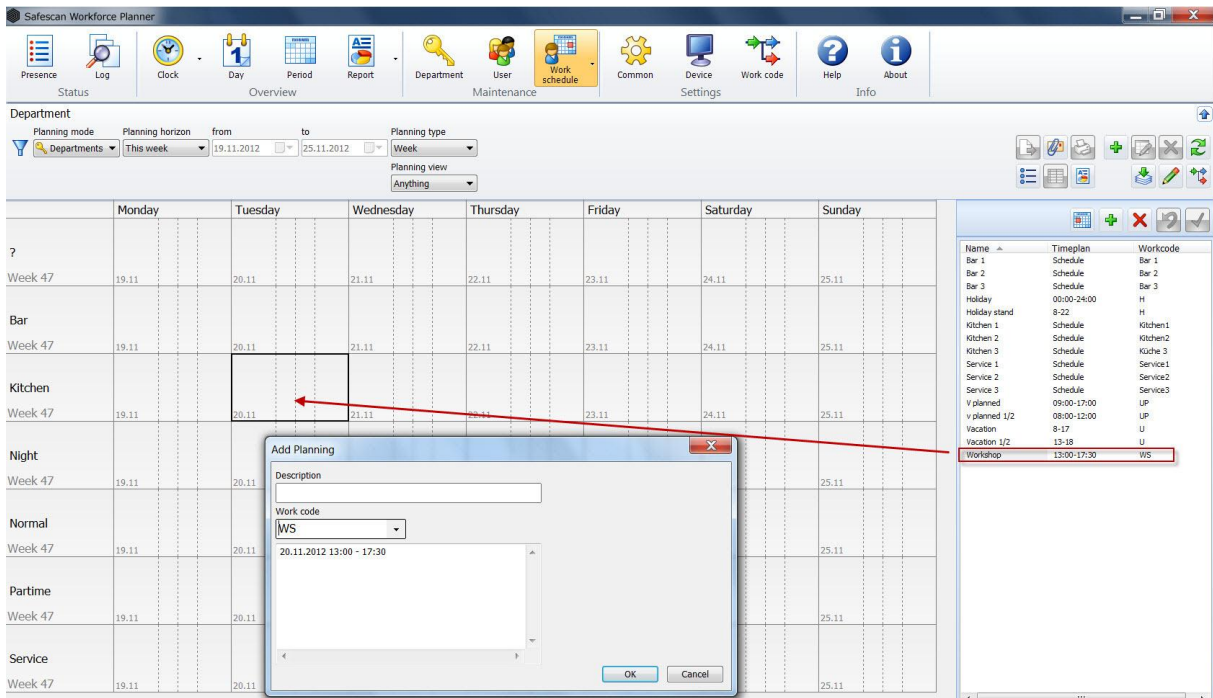
8.1.17 Planning with a time plan template for departments

To schedule a time period as, for example, a work shop, etc. for an entire department.

Select "department" in the planning group., All the departments are listed in the grid view.

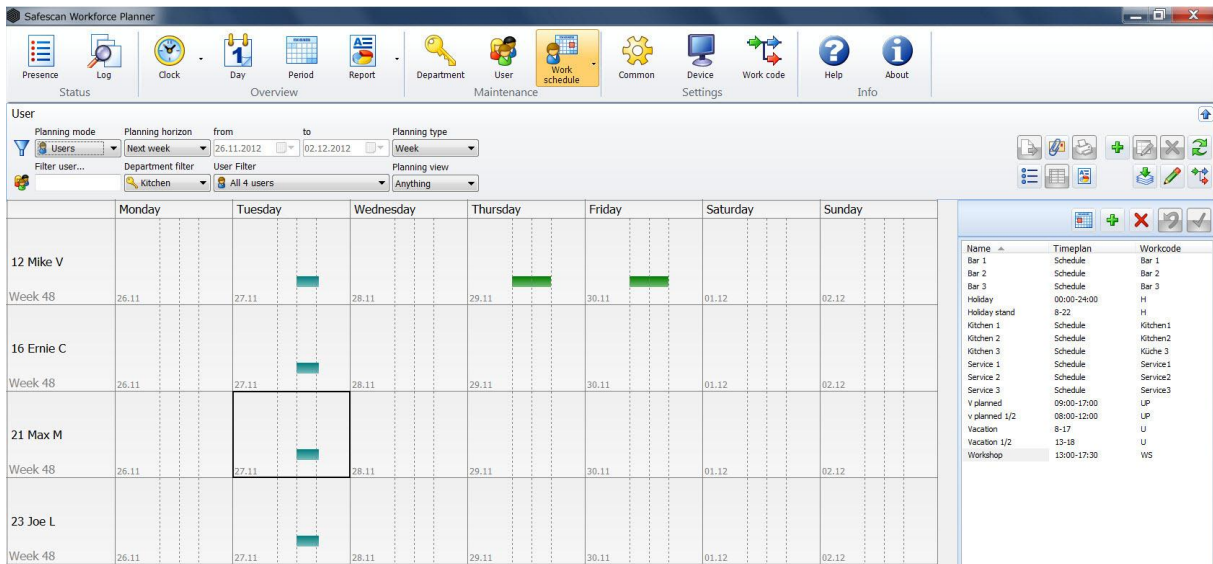


For the user, select the desired time period and drag and drop the schedule onto the selected area.



Confirm this with OK if you want to overwrite the plan.

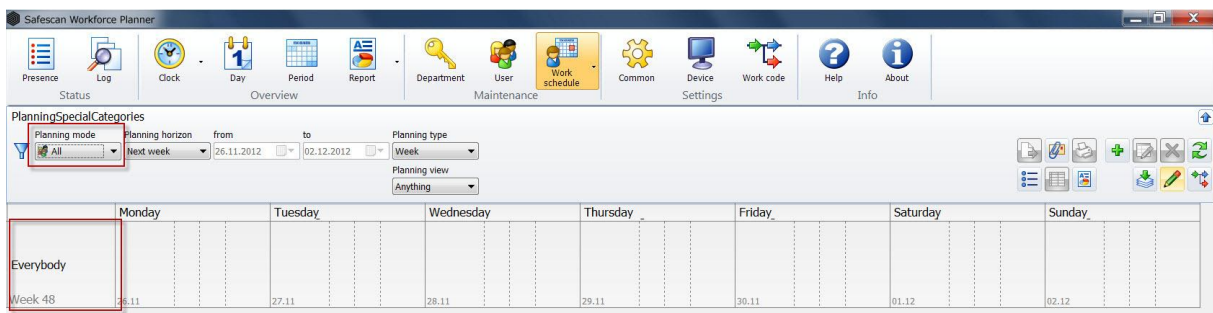
All the employees allocated to this department are now scheduled for this workshop.



8.1.18 Planning with a time plan templates for 'All'

If you want to schedule a time period for the entire operation as, for example, with company holidays, long weekends, holidays, etc.

Select "All" under planning group. In the grid view "All" is still the only option available.




For the user, select the desired time period and drag and drop the schedule onto the selected area. The plan will apply to ALL employees.

8.1.19 Add planning or time plan

If you want to set up a plan without a time plan template, select an employee, or if you want to set up a plan for a department select "Department" under planning group, or "All" if you want to set up a plan for the entire operation.



Select the time period that you wish to add the plan to and click on  or with the right mouse button directly into the selected area and select add.

Add Planning ✕

Description

Scheduled date	Time	Scheduled end	Time
5/ 2/2013	<input type="text"/>	5/ 2/2013	<input type="text"/>

User

Work code

- Rename the plan
- Adjust the start and end dates
- Enter the start time and the end time e.g. 08:00-17:00
- If the fields are left blank 24 hours will be allocated
- Make sure you enter the correct times
- If necessary change the user
- Assign a work code to the plan






Note: Breaks cannot be entered in this way. These must be entered using one further step.



Note: Fields marked in red are mandatory

8.1.20 Edit, change or delete the planning

Plans can be modified or adjusted by clicking with the right mouse button on the day cell.

This gives an overview of the plan for this day with information about the time plan used.

	Edit 22.11.2012 15:00 - 17:30 (Kitchen 15:00 - 23:30 - Break 0.5h)
	Delete 22.11.2012 15:00 - 17:30 (Kitchen 15:00 - 23:30 - Break 0.5h)
	Edit 22.11.2012 18:00 - 23:30 (Kitchen 15:00 - 23:30 - Break 0.5h)
	Delete 22.11.2012 18:00 - 23:30 (Kitchen 15:00 - 23:30 - Break 0.5h)
	Add new

- Delete the plan by clicking on 
- Edit the plan by clicking on 


Edit planning

Description


Scheduled: 21/11/2012 Time: 15:00 Scheduled end: 21/11/2012 Time: 17:30

User: 12 Mike Mike V Work code: Kitchen2

OK Cancel

- Add on a plan by clicking on  and add the screen.
- Make sure you enter the correct times.
- If the fields are left blank 24 hours will be allocated.

8.1.21 Print planning grid

In the planning grid you have the option to print weekly work schedules overview. Select the desired time period (this week, this month, etc.) as well as department and/or user. Click on . You get a preview of the weekly work schedule. Confirm with OK to print this.

Safescan Workforce Planner

User

Planning mode: Users Planning horizon: This week from 19.11.2012 to 25.11.2012

Filter user... Department filter: All User Filter: All 15 users

211 (Service1)

Days	19.11.2012	20.11.2012	21.11.2012	22.11.2012	23.11.2012	24.11.2012	25.11.2012
10:00-14:00	-	13 Jasmin B 14 Anna K	13 Jasmin B 14 Anna K	13 Jasmin B 15 Monica S	13 Jasmin B 15 Monica S	13 Jasmin B 20 Nicole P	-
16:00-20:00	-	13 Jasmin B 14 Anna K	13 Jasmin B 14 Anna K	13 Jasmin B 15 Monica S	13 Jasmin B 15 Monica S	13 Jasmin B 20 Nicole P	-

212 (Service2)

Days	19.11.2012	20.11.2012	21.11.2012	22.11.2012	23.11.2012	24.11.2012	25.11.2012
12:00-15:00	-	-	-	14 Anna K 20 Nicole P	10 Joseph M 14 Anna K 20 Nicole P	10 Joseph M	-
17:30-22:00	-	-	-	14 Anna K 20 Nicole P	10 Joseph M 14 Anna K 20 Nicole P	10 Joseph M	-

213 (Service3)

Days	19.11.2012	20.11.2012	21.11.2012	22.11.2012	23.11.2012	24.11.2012	25.11.2012
16:00-18:00	-	20 Nicole P	15 Monica S 20 Nicole P	-	-	14 Anna K 15 Monica S	-

Note: Only weekly views can be printed - monthly views are split into weeks so that the data are legible.

9 Holiday planning

The planning of days off and holidays for your employees is a breeze in the planning grid. The grid gives you a clear overview. Days off are added simply by using drag and drop to assign them to an employee.

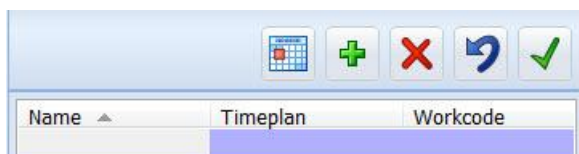
Create "Holiday templates for the Rapid Selection List" such as full-day holiday, half-day holiday; public holiday, etc.

9.1 Create Holiday Templates

9.1.1 Holiday Time Plans - Work schedules

Draw up a time plan for holidays with a work schedule, then assign the appropriate work code (see **Chapter 11.2**). This time plan is required if your employees work on a fixed work schedule .

- Add a new work schedule to the list of templates .




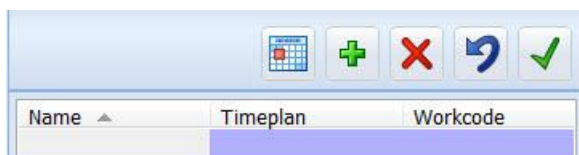
Name	Timeplan	Workcode
------	----------	----------

- Enter a name directly into the field.
- In the "Time Plan" field enter a time of day that will cover all work schedules, (for example 01:00-23:30). The vacation calculation will be adjusted in accordance with the work schedule. (For example, work schedule-1: Mon-Fri 08:00 to 12:00, 13:00 to 17:00 8hrs, this time is planned holiday).
- Include the holiday work code (that you prepared in advance) in the work code (See **Chapter 11.2.1**)

9.1.2 Holiday time plan for flexible time planning

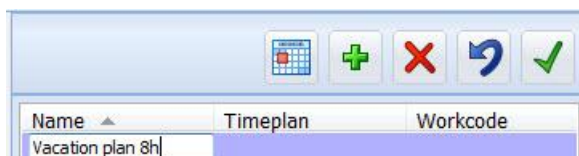
This type of time plan is required if you are working in shifts or if employees are not assigned to a fixed work schedule.

- Add a new time plan to the list of templates .



Name	Timeplan	Workcode
------	----------	----------

- You can type the name directly into the cell.





Name	Timeplan	Workcode
Vacation plan 8h		



Name	Timeplan	Workcode
Vacation plan 8h	09:00-17:00	UP

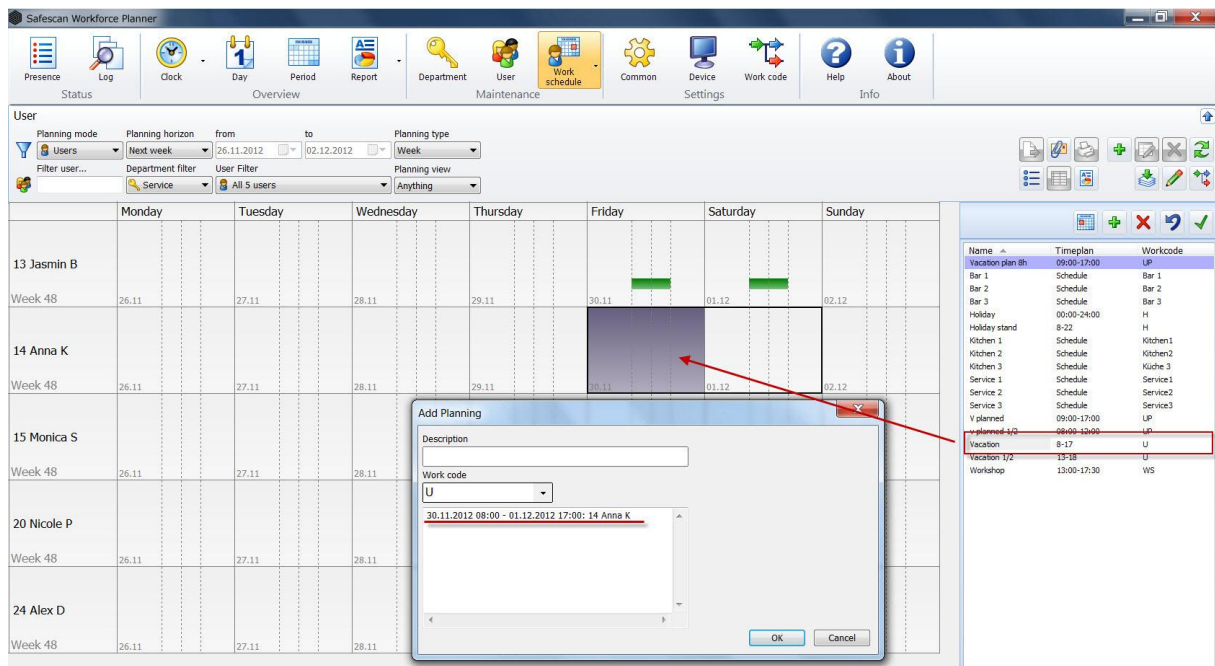
Note: For a time plan you must either post a time between 09:00 and 17:00 or use a time plan template,

- or open  a schedule template, and create a time scheme. See **Chapter 8.1.13**
- Include the holiday code (Planned Holiday) that you had prepared in advance, in the work code (See **Chapter 11.2.1**)

Confirm these inputs by clicking .

9.1.3 Holiday Planning with Time Plans

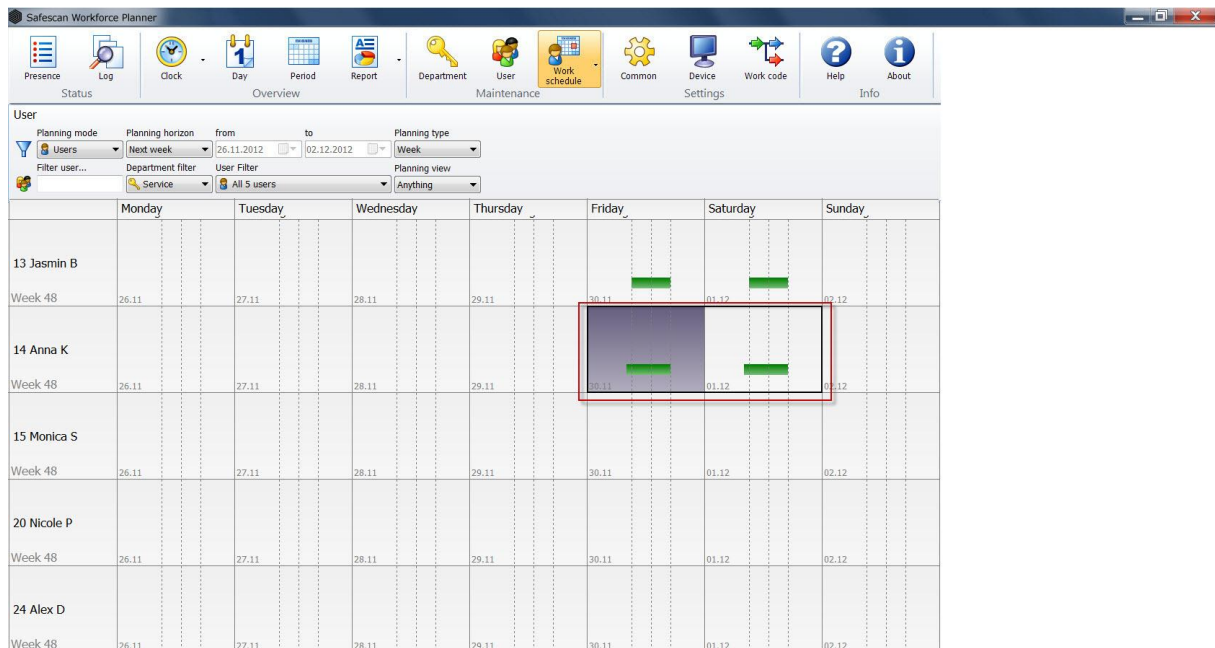
Select the period requested by the employee for the holiday and drag the appropriate time plan (work schedule or flexible) directly onto the selected area. The holiday is posted and will be included in all the reports.



The screenshot shows the Safescan Workforce Planner interface. The main window displays a calendar grid for users 13 Jasmin B, 14 Anna K, 15 Monica S, 20 Nicole P, and 24 Alex D. The 'Add Planning' dialog box is open, showing the following fields:

- Description: (empty)
- Work code: U
- Selected period: 30.11.2012 08:00 - 01.12.2012 17:00: 14 Anna K

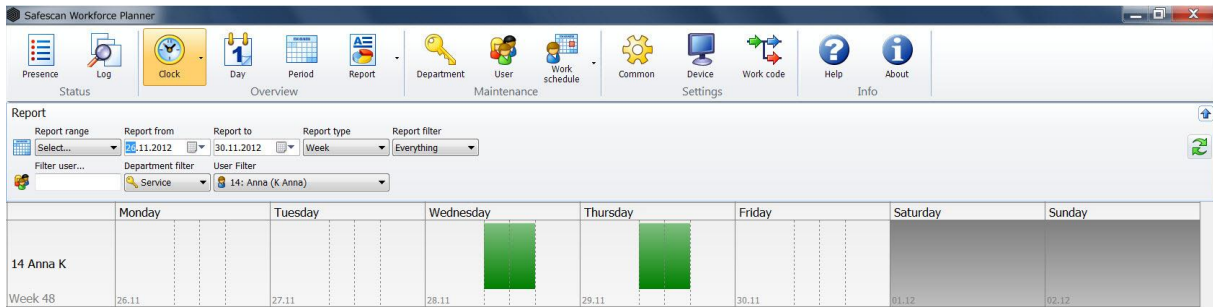
The dialog box has 'OK' and 'Cancel' buttons. A red arrow points from the dialog box to a selected area in the calendar grid for user 14 Anna K on Friday, 30.11.2012.



The screenshot shows the Safescan Workforce Planner interface. The main window displays a calendar grid for users 13 Jasmin B, 14 Anna K, 15 Monica S, 20 Nicole P, and 24 Alex D. A red box highlights the selected area in the calendar grid for user 14 Anna K on Friday, 30.11.2012.

Holiday planning is reflected in all the reports as well as in the clock grid view. Holiday hours are also calculated in the master data.

Clock grid



Employee master data

The screenshot shows the 'User' view in Safescan Workforce Planner. The user filter is set to '14: Anna (K Anna)'. The table below shows the employee master data for user 14 Anna K.

User name	Last name	Department	RFID No	Privilege	Status	Personnel no	Email	Phone	Work schedule	Vacation taken	Vacation planned	Remaining days of vacation	Work Time
14	Anna	K	Service	User	Active	0910101	Anna@safescan.com	308		0	16	34	42

Below the table, the 'Vacation' section shows the following values:

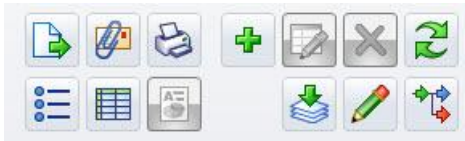
- From last year: 0
- Correction: 0
- Remaining vacation in hours: 0
- Number of vacation in hours per special leave I: 50
- Special leave II: 0
- Total hours of vacation for the current year: 50
- Total this and last year Total t/m nu: 50
- Hours taken: 0
- Hours planned: 16
- Hours remaining: 34


Report review

Date: 22-11-2012		Period report				26-11-2012 - 30-11-2012			
Time: 17:24		Name: Anna K		ID: 14		Work schedule:			
		Department: Service		Personnel no: 0910101					
Vacation hours 50		Vacation taken 0		in this period 16		Remaining days of vacation 34			
Overtime balance forward -43.0		Overtime current month 0.0		Overtime previous month -43.0					
Date	Day	In	Out	Roster	Hours	Balance	Cumm.	Absent	Remarks / Work code
26-11	Mon	-	-	-	-	-	-	-	
27-11	Tue	-	-	-	-	-	-	-	
28-11	Wed	-	-	-	-	-	-	-	8:00 Vacation for Shift-Planning
29-11	Thu	-	-	-	-	-	-	-	8:00 Vacation for Shift-Planning
30-11	Fri	-	-	-	-	-	-	-	
Week	48			16:00	16:00	-			
Total				16:00	16:00	-			

10 Holidays

Safescan Workforce Planner includes a large number of official European holidays that you can add with one click on the database.



Select  and you get an overview of all the available lists of public holidays sorted by country.

Open the desired country and select your region (regions are not available for all countries).

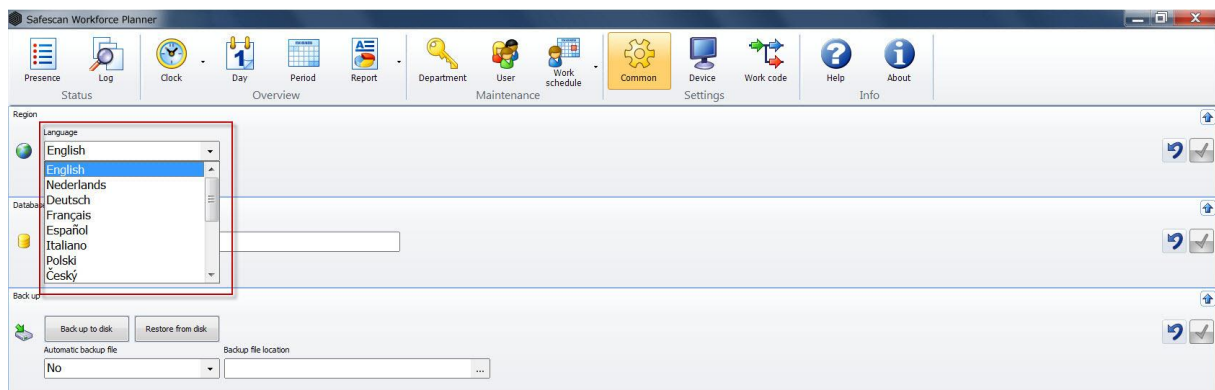
Confirm with OK. The data is imported directly into the software database.

11 Settings

11.1 General

11.1.1 Set language

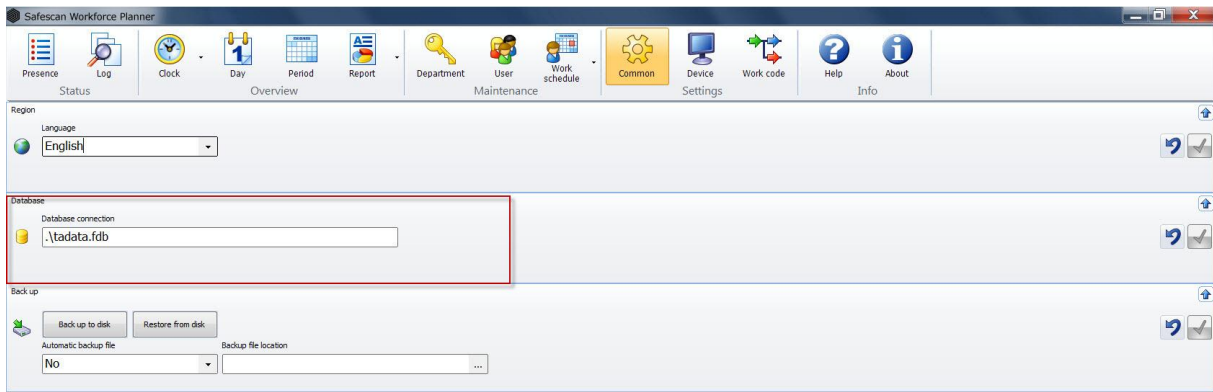
Select the language you want. Use to save this change. For the changes to take effect, close the software, then restart it.



Note: After the language has been changed, the software must be restarted!

11.1.2 Database connection

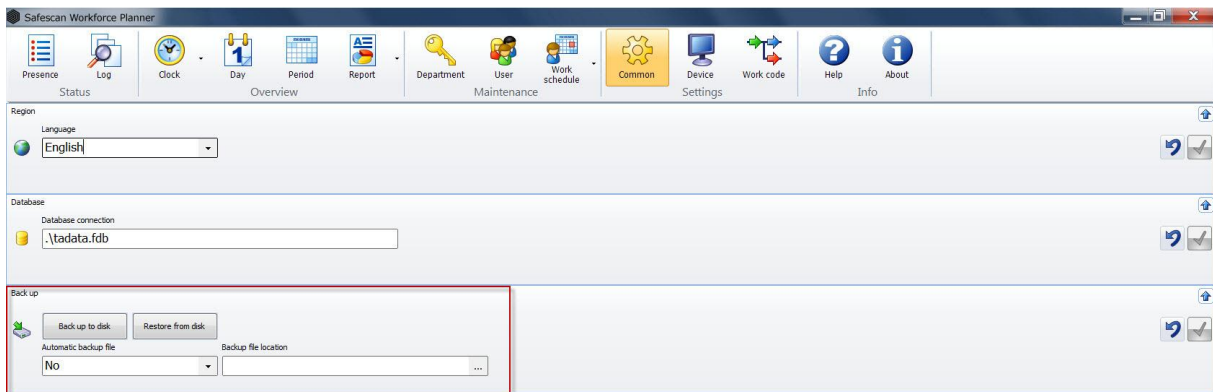
The software automatically uses the memory location that was selected during the software installation, in which the database is stored. The database connection field is empty, and should only be filled in manually in exceptional cases.



If the software and the database have been stored in different locations, this counts an exceptional case. In any such exceptional cases, please contact your IT department.

11.1.3 Backup

If the database is stored locally on your computer, the software will perform an automatic backup at regular intervals. Set the interval you want from the drop-down menu.

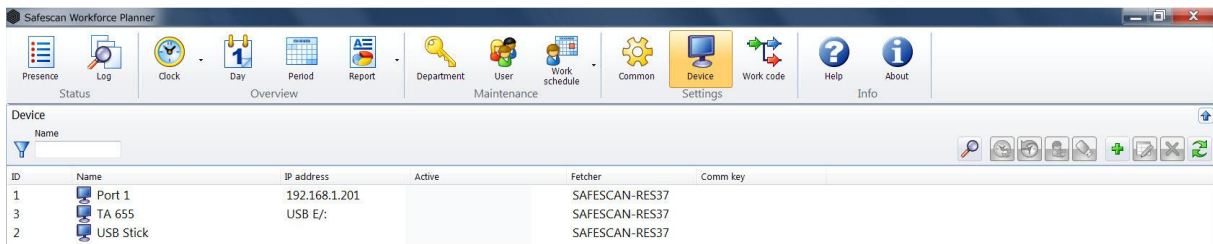


11.1.4 Device/time attendance device

Before time bookings can be processed in Safescan Workforce Planner, they must be entered using the time attendance device. Safescan Workforce Planner reads out the bookings on the time attendance device, transfers them to the PC and classifies them on the workforce planner database. Two options are available for the data transmission procedure:

- Data line (TCP/IP, RS232, 485)
- USB memory (cable)

You can connect an unlimited number of time attendance devices to the software to calculate times. If you have not connected your time attendance device via your local network and are working with a USB stick, select the USB stick settings (a combination of TCP/IP and USB stick is possible).

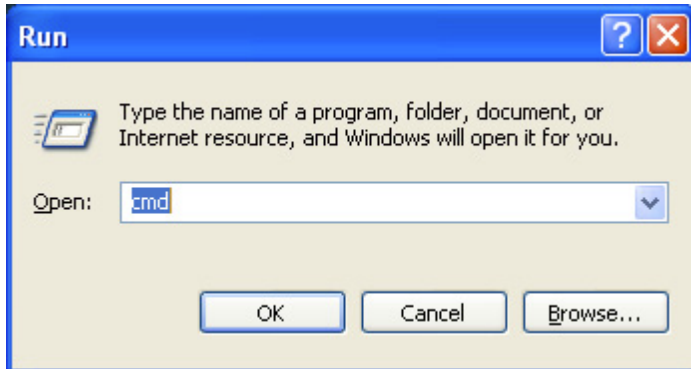


- Note:**
- Time bookings are only transferred from the time attendance device to the software!
 - User data must always be updated and synchronised manually.

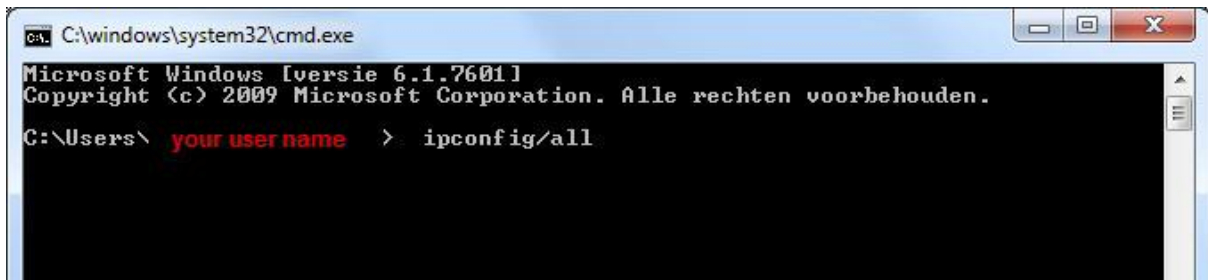
11.1.5 Data connection with TCP/IP

If you want to connect your time attendance device to your network via TCP/IP, you must assign a free IP address that falls within your IP address range to the device. The IP address 192.168.1.201 is stored on the time attendance device as standard.

Find your IP address range:



If the IP address prompt appears, type "ipconfig /all".



- Look at your IP address.
- This is your IP address; it usually begins with "192".

In the example: 192.168.1.149

```
Command Prompt
C:\Documents and Settings\Daniel>ipconfig /all

Windows IP Configuration

    Host Name . . . . . : monarch
    Primary Dns Suffix . . . . . :
    Node Type . . . . . : Unknown
    IP Routing Enabled. . . . . : No
    WINS Proxy Enabled. . . . . : No

Ethernet adapter Local Area Connection 6:

    Connection-specific DNS Suffix . :
    Description . . . . . : Realtek RTL8139 Family PCI Fast Ethernet NIC
    Physical Address. . . . . : 00-0D-88-2D-2B-34
    Dhcp Enabled. . . . . : Yes
    Autoconfiguration Enabled . . . . : Yes
    IP Address. . . . . : 192.168.1.149
    Subnet Mask . . . . . : 255.255.255.0
    Default Gateway . . . . . : 192.168.1.1
    DHCP Server . . . . . : 192.168.1.1
    DNS Servers . . . . . : 66.51.206.100
    Lease Obtained. . . . . : Saturday, March 03, 2007 10:30:01 AM
    Lease Expires . . . . . : Saturday, March 03, 2007 10:30:01 PM

C:\Documents and Settings\Daniel>
```

Find an unused IP address.

- Type "ping", then enter your IP address. Change the last two digits and press "Enter".

In this example: ping 192.168.1.1

Once the IP address is active it receives all data packets.

```
C:\WINDOWS\system32\cmd.exe
Microsoft Windows XP [Version 5.1.2600]
(C) Copyright 1985-2001 Microsoft Corp.

C:\Documents and Settings\Matt>ping 192.168.1.1

Pinging 192.168.1.1 with 32 bytes of data:

Reply from 192.168.1.1: bytes=32 time=1ms TTL=64
Reply from 192.168.1.1: bytes=32 time<1ms TTL=64
Reply from 192.168.1.1: bytes=32 time<1ms TTL=64
Reply from 192.168.1.1: bytes=32 time<1ms TTL=64

Ping statistics for 192.168.1.1:
    Packets: Sent = 4, Received = 4, Lost = 0 (0% loss),
    Approximate round trip times in milli-seconds:
        Minimum = 0ms, Maximum = 1ms, Average = 0ms

C:\Documents and Settings\Matt>
```

The software requires a free IP address. In this example: ping 192.168.1.10

```
C:\WINDOWS\system32\cmd.exe
Microsoft Windows XP [Version 5.1.2600]
(C) Copyright 1985-2001 Microsoft Corp.

C:\Documents and Settings\admin>ping 192.168.1.10

Pinging 192.168.1.10 with 32 bytes of data:


Destination host unreachable.
Destination host unreachable.
Destination host unreachable.
Destination host unreachable.

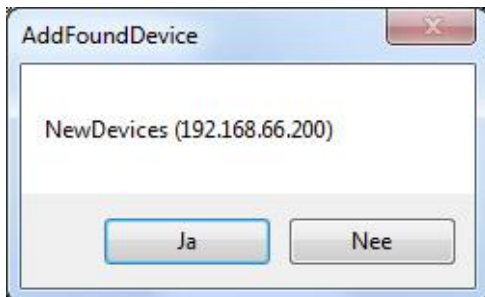
Ping statistics for 192.168.1.10:
    Packets: Sent = 4, Received = 0, Lost = 4 (100% loss),


C:\Documents and Settings\admin>
```

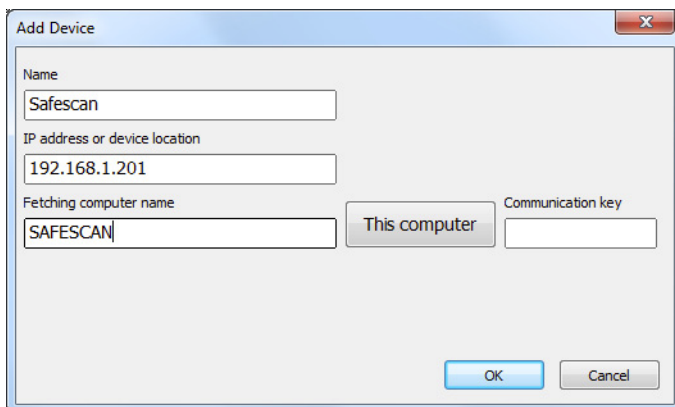

Once you have found a free IP address, save it on the device by following the instructions of your time attendance device.

When you have stored the IP address on the time attendance device and the device is connected to your network.

Use  in "Device" to search for new devices and confirm with "Yes".

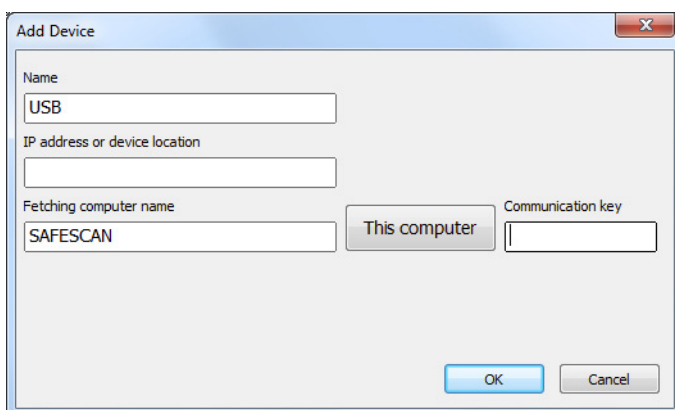


Or click on  and enter a name and the IP address manually, click on "This computer" and enter the communication keys if you have saved them on the time attendance device (fields highlighted in red are required fields).




If the device is connected, the status in "Active" will change to "Connection made".

You can connect several time attendance devices with the software via your network. If a device cannot be connected to the network, you can add it manually as a USB drive.

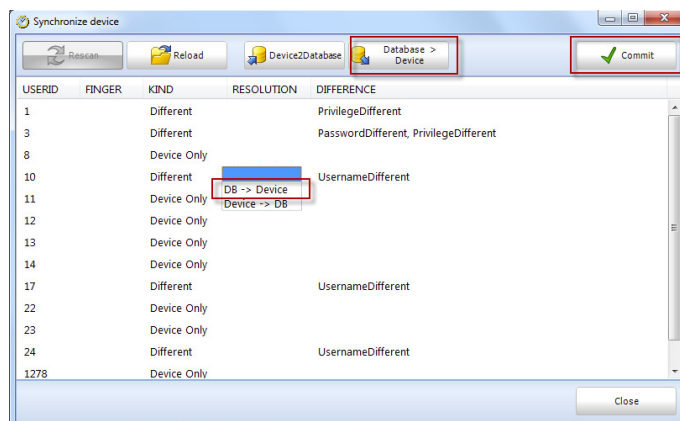


Once your time attendance device is connected with the software, booking times that have already been stamped are automatically transferred to the software. The user data must be synchronized manually, see **Chapter 11.1.6**.

11.1.6 Synchronizing the user data

If your time attendance device is connected to the software you must synchronize the user data from the time attendance device with the software. To do this, select ; all users that have been stored on the time attendance device are displayed in the summary. In this case you should synchronize "Device" to database and use "Run" to confirm. Then edit the user data in "User" as described in **Chapter 7.2.5**.

If the users have been entered into the software, please synchronize: Database to device.



If users have been entered into both the time attendance device and the software you should check, during synchronization, the location in which the data is more up-to-date and synchronize in the direction you want, see also **Chapter 11.1.6**.

If you do not want to synchronize all the data or if the data does not all have the same direction, you can select any user ID individually and define the direction, or ignore it so that it will not be synchronized.

To do this, click on the field next to "Resolution" to get drop-down list (empty = none Synchronization; DB /Device = database – device; Device/DB = device – database).

11.1.7 Data transfer using a USB stick

To transfer the booking from the time attendance device to the PC, please follow the instructions below.

Transferring bookings to a USB memory.

a) Time attendance device with an LCD display

- Connect the USB memory to the time attendance device USB port.
 - Log into the time attendance device.
 - Then press the [Menu] key.
 - Use the arrow keys to select "USBDrive Mng" (USB drive manager) and press [OK].
 - Use the arrow keys to select "Download logs" (USB drive manager) and press [OK].
- An indication that the data has been copied will then be displayed. If "Copy Data OK" appears, the data transfer to the USB memory is complete. The file saved with the bookings is called: 1_attlog.dat


- Repeat the process if you also want to load the data onto the USB stick by selecting "User dat" (download user data) and press OK. An indication that the data has been copied will then be displayed. If "Copy Data OK" appears, the data transfer to the USB stick is complete. The file saved with the user data is called:
1_User.dat or User.dat.
- Remove the USB stick.

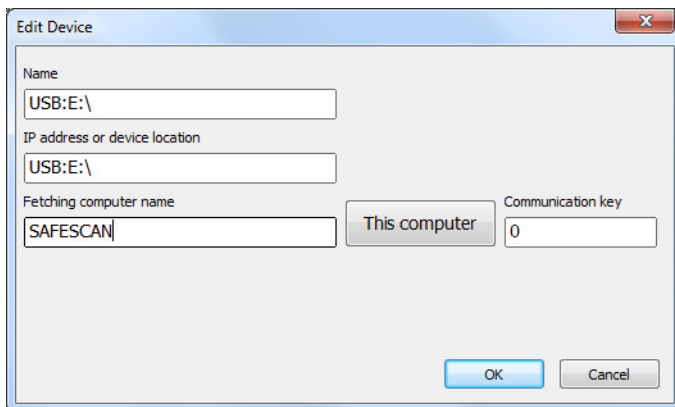
Note: If there are variations in the time attendance device user interface, please read this Chapter in the user manual that was delivered with your time attendance device.

11.1.7.1 Time attendance device with TFT display

- Connect the USB stick to the time attendance device USB port.
- Log into the time attendance device.
- Then press the [Menu] key.
- Use the arrow keys to select "USBDrive" and press [OK].
- Use the arrow keys to select "Download" and press [OK].
- Use the arrow keys to select "Dload bookings" and press [OK]. An indication that the data has been copied will then be displayed. If the words "Download ended" appear, press [OK]. The data transfer to the USB stick is complete.
- The file saved with the bookings is called: 1_attlog.dat
- Press the [ESC] key until you have exited the menu.
- Remove the USB stick.

11.1.7.2 Time attendance devices with a USB cable


- Connect the time attendance device to your computer via the USB cable.
- Use  in "Device" to search for new devices, then confirm with "OK" that the time attendance device has connected to the software automatically, or enter the device manually as described above.




- Synchronize the user data as explained in **Chapter 11.1.6**.
- The booking data is transferred to the software automatically.
On model TA 655, data is read at a lower frequency, which means that there is a longer time interval than for the TA-800 or TA-900 series (on the TA-800 and TA-900 series, the data transfer takes a maximum of 1 second).

11.1.8 Reading bookings on a PC

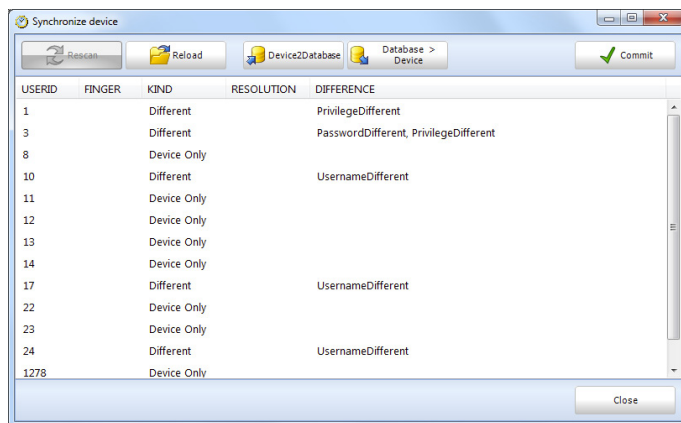
If you want to synchronize the data with the software for the first time, you must first create a USB stick "Connection".

Select , then assign a name (e.g. USB). The field with the IP address must be empty, fields highlighted in red are required fields. Press "This computer". If you have saved a communication key on the time attendance device, please enter it in "Communication key". Confirm with OK (see **Chapter 11.1.6**).

- Connect the USB memory to the PC USB port.
- The booking times will be read from the USB stick automatically and processed in the software.
- To update the user data, highlight the row with the USB device.
- Click on  and select the file 1_user.dat from the USB memory and click on "Open".

Naam	Gewijzigd op	Type	Grootte
 user	14.07.2011 10:41	TMT3 File	1 kB

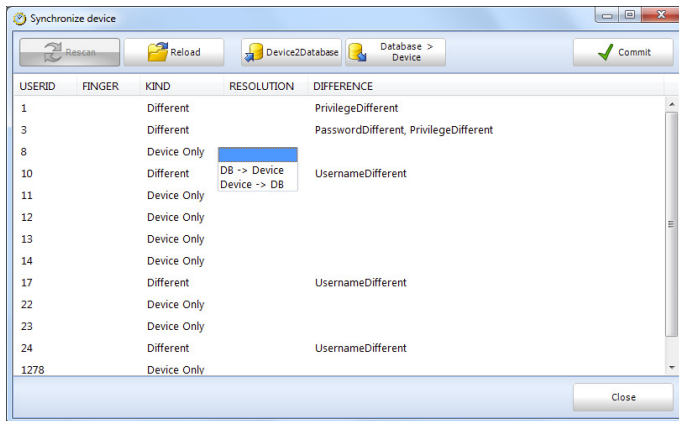
In the synchronisation window, please select the direction in which you want to perform the synchronisation.



If you have data that is more up-to-date in the time attendance device than in the software, please select "Device/database". If the data in the software is more up-to-date, select - "Database/device".

You can see in the summary of each user ID whether the user exists in the device only or in software only, or whether there is a difference between the software and the device. You can see which information is different in the difference description. Now select the synchronization direction.

If you do not want to synchronize all the data or if the data does not all have the same direction, you can select any user ID individually and define the direction, or ignore it so that it will not be synchronized. To do this, click in the field next to "Resolution". You will then see a drop-down list (empty = no synchronization; DB/Device = database - device; Device/DB = Device - database).



Example of differences:

A user with an ID has been created without a name on the device. If you synchronise data, you will see the following message: "Device only". Synchronise this data – device/DB and edit the user ID in "User". Add a new user name and synchronise it once again with the time attendance device.

During the synchronisation you will now see the following message: "Different!" And, in the description: User name different. Now synchronise "DB/Device" so that the user names on the time attendance device are overwritten and the user is recognised at the next login.

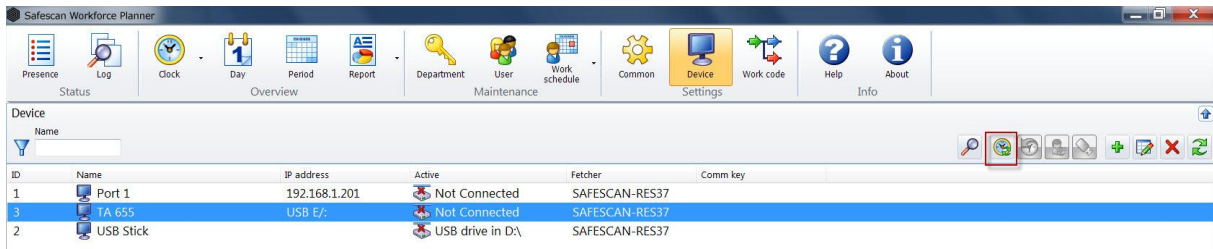
11.1.9 Synchronising user data

First synchronise the user data as described in **Chapter 11.1.6**.

Make sure you confirm the direction for the synchronisation. Check the clock time for the data in the software and the time recording device.

11.1.10 Import entries from a TA 655 onto the computer

Select the row in the device (see Figure) and click on



The attendance log will be copied from the device and transferred to the software. After completing the data transfer, you will be asked whether the attendance log is to be deleted in the time recording device.


Please only confirm this with **Yes** if you are absolutely sure to delete the data in the device. Only the attendance log will be cleared, not the user data.

11.2 Work codes

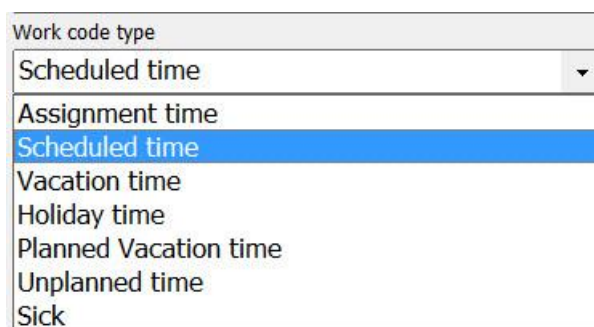
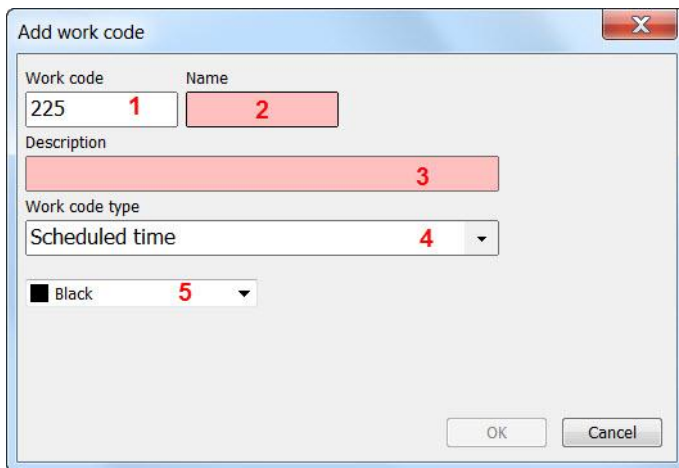
With work codes, specific names are added to a user's clock times within the program. Work codes provide an overview and explanation of absences (added manually). Work codes can be added to the clock times in the software by a supervisor or administrator.

Note: In the TA 800 series, the work codes must be entered directly (see user manual for TA 800 series). Use the work codes in your employees' clock times to specify, for example, business trips, holiday, doctor's appointments, etc. This information will appear in the monthly report.

11.2.1 Add/Create a work code

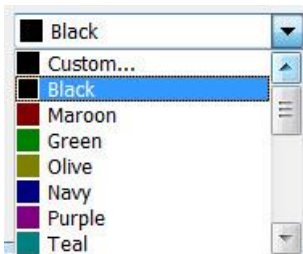
Select  and edit the work code screen where you want to do one of the following:

- 1 Select a work code no.
- 2 Assign a short name
- 3 Assign a description
- 4 Under work code type, select the calculation method for the work code.
- 5 Select the colour code.



- Assigned time
 - For assignment to projects
- Scheduled time
 - This work code will be calculated as normal working hours
- Vacation
 - The work time entered in the work schedule is converted into holiday days and will be recognised in reports as paid holiday.
- Holiday time
 - Legally mandated holidays are reported as paid days.
- Planned vacation time
 - Holiday time without work schedule
 - Required if you use shift schedules rather than a fixed work schedule. For this purpose, in the planning, a time plan will be created (see **Chapter 9.1**)
- Unplanned time
 - For unpaid working hours/vacation
 - This function removes an existing work schedule for the selected time period and during this time period you can enter a different schedule without replacing the whole work schedule.
- Sick
 - Work codes for illnesses or accidents: reported as paid work time

You will have an improved view later to plan your work, we recommend assigning colour codes to work codes.




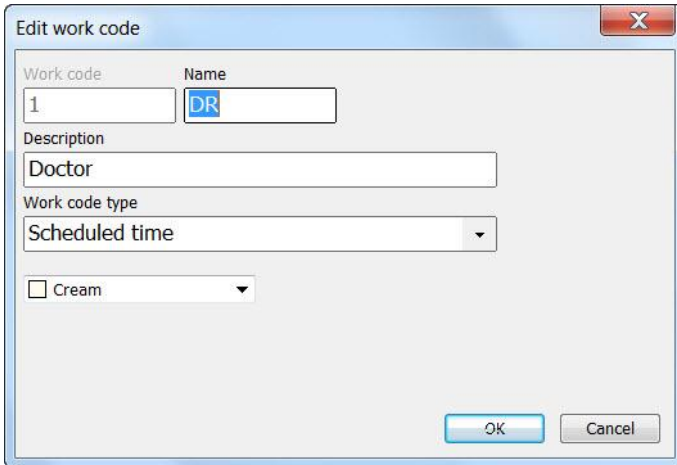
You can select a colour from the list or using Custom... create a suitable work code colour.

Example:

Work codes			
Name		Description	
ID	Name	Description	Color
201	Bar 1	Bar-Service 11:00 - 21:00 - Break 2h	
202	Bar 2	Bar-Service 16:00 - 00:30 - Break 0.5h	
203	Bar 3	Bar-Service 17:00 - 22:00 - Break 0.25h	
1	DR	Doctor	
111	Entplan	Unplanned time	
15	H	Holiday	
221	Kitchen1	Kitchen 09:00 - 19:00 - Break 2h	
222	Kitchen2	Kitchen 15:00 - 23:30 - Break 0.5h	
223	Küche 3	Kitchen 11:00 - 20:00 - Break 1h	
100	Projekt5	Project 5	
110	Projekt6	Project 6	
211	Service1	Service 10:00 - 20:00 - Break 2h	
212	Service2	Service 12:00 - 22:00 - Break 2.5h	
213	Service3	Service 16:00 - 00:30 - Break 0.5h	
2	Sick	Sick	
10	U	Vacation	
11	UP	Vacation for Shift-Planning	
224	WS	Workshop	

11.2.2 Edit a work code


To change or edit a work code, select and double-click or click on . Make the desired changes and confirm with OK.



The screenshot shows a dialog box titled "Edit work code". It contains the following fields and controls:

- Work code:** A text input field containing the number "1".
- Name:** A text input field containing the text "DR".
- Description:** A text input field containing the text "Doctor".
- Work code type:** A dropdown menu currently displaying "Scheduled time".
- Cream:** A checkbox with the label "Cream", which is currently unchecked.
- Buttons:** "OK" and "Cancel" buttons are located at the bottom right of the dialog.

11.2.3 Delete a work code

Select the work code you want to delete, click on . Confirm with OK.

12 Info

12.1 Help

12.1.1 Technical Support

a) **Support on the Safescan website**

Our service page on our website is available 24 hours a day in is updated regularly.

Please go to: www.safescan.com/manuals. You will find the answers to your questions and suggested solutions in the FAQ.

b) **Support hotline**

Our support team is available to answer any technical questions you may have by telephone from Monday to Friday, between 09:00 and 17:00. Please contact: www.safescan.com

12.2 Impressum

12.2.1 Updates and upgrades

We will make updates and/or upgrades available to you at www.safescan.com/manuals. Please check regularly to ensure that you have the latest software version.

13 Server installation

For more information about server installation, please visit our website www.safescan.com/updates_ta or contact our help desk.

14 Uninstalling Safescan Workforce Planner

To uninstall Safescan Workforce Planner, please proceed as follows:

- Start/configuration/software.
- Select Safescan Workforce Planner, then select [Uninstall software].