



timeware®

HR, Time and Attendance Software

Pre Installation Report

Customer Name

Meeting date

Author

Version

Important Information

This report records the requirements, rules, and information gathered during the meeting and will be used as the basis for configuring the system. While every effort will be made to implement the system exactly as outlined, minor adjustments may be required during installation to accommodate technical constraints or best-practice configuration. Any changes will be discussed and agreed prior to implementation.

Data Imports

If import spreadsheets have been provided, these must be fully completed and ready for use by the installation date. Due to GDPR requirements, personnel import spreadsheets must not be sent back to us in advance and should instead be kept securely on-site and provided directly to the timeware® technician during installation.

If all required information is not available on the scheduled installation dates, we may need to rearrange the installation.

Workspace & Access Requirements

The customer must provide a suitable workspace for the technician for the duration of the project. The timeware® technician will require access to the server, either via their own laptop with customer-provided internet access and remote desktop details, or via a customer-provided workstation with server access fully enabled.

User Training

Training will take place during the final 1–2 days of the installation period and will be arranged directly with the timeware® technician during the installation.



Certificate No:
491342025

Company Name: timeware (UK) Ltd.

Registered Office: 3 Fieldhouse Road, Rochdale,
Greater Manchester, OL12 0AD.

Company Reg. No: 05886806.

Registered in: England.

Pre Installation Report	1
Infrastructure: Software	3
Infrastructure: Hardware	6
Biometric Enrolment	8
Project Build: Integrations	9
Project Build: Personnel	10
Project Build: Absence Management	14
Project Build: ESS Go	17
Project Build: Attendance Adjustments	19
Project Build: Access Control	23
Project Build: Fire Roll Call	25
Project Build: Reports & Exports	26
Payroll Integration	27
Project Commissioning	28
User Training	29

Infrastructure: Software

General

1. Expected/estimated go live date
2. Will the system be rolled out in stages? Yes No

Additional Information

Server

1. Server name
2. Server IP address (static)
3. Confirm server meets the system requirements Yes No
4. Recommended specification
5. What drive should timeware® be installed on?

Additional Information

Microsoft SQL

- 1. Will SQL be installed/hosted from a different server? Yes No
- 2. Server name
- 3. Server IP address (static)
- 4. Confirm server meets the system requirements Yes No
- 5. What drive should SQL be installed on?
- 6. SQL Edition
- 7. SQL Version
- Additional Information

Backup

- 1. Will database backups be handled by timeware®? Yes No
- 2. What time will the backup be run?
- 3. How many days' worth of backups should be kept?
- 4. Where should we store backups?
- Additional Information



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Clients/Users

- 1. How many client installs of timeware® are required?
- 2. Can IT assist with the installs? Yes No

Additional Information

Accounts

- 1. Can a timeware® account be created for the server with the below? Yes No
 - a. Administrator privileges
 - b. Run tasks as admin within task scheduler
 - c. Password set to never expire

Additional Information

Remote Support

- 1. Will timeware® be able to access the server? Yes No
 - a. Unattended Yes No
 - b. Scheduled slots with IT Yes No
- 2. What software will be used?

Additional Information

Infrastructure: Hardware

General

1. Will timeware[®] be managing devices?
2. Type of devices
3. Naming of devices (location & area)

4. Confirm network points are ready
5. Confirm fuse spur points are ready
6. Will 3rd party cards/fobs be used?

Additional Information



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Network

1. Device IP address(s) (static)

2. Device gateway

3. Device subnet mask

Additional Information



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Biometric Enrolment

General

1. Will timeware® be handling employee enrolment? Yes No

2. How many employees require enrolment?

3. What languages are employees working in?

Additional Information

Schedule

1. What shift patterns are worked?

2. Can an enrolment schedule be provided? Yes No

Additional Information



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Project Build: Integrations

General

- 1. Will timeware® be integrating with other systems? Yes No
- 2. Specify integrations
- 3. Will timeware® be the lead system?
- 4. How often will the integrations run?

Additional Information

API

- 1. Do we require system user account? Yes No
- 2. Do we require an API key? Yes No
- 3. Do we require an API secret? Yes No

Additional Information

Project Build: Personnel

General

1. Will personnel data be imported from another system or spreadsheet?
2. How many employees will be imported?
3. Are payroll numbers required and must they be unique?
4. Are period schedules required? Yes No
5. Are terminal policies required? Yes No
6. Are email policies required? Yes No
7. Are remuneration policies required? Yes No
8. Are any user defined fields (UDF's) required? Yes No

Additional Information

Groupings

1. What groupings are required?
 - a. Grouping 01:
 - b. Grouping 02:
 - c. Grouping 03:
 - d. Grouping 04:
 - e. Grouping 05:
 - f. Grouping 06:
 - g. Grouping 07:
 - h. Grouping 08:
 - i. Grouping 09:
 - j. Grouping 10:

Additional Information

Sub Sections

1. What sub sections are required?

a. Personal	Yes	No
b. Employment (required for GDPR)	Yes	No
c. Contact Details	Yes	No
d. Training and Qualifications	Yes	No
e. Achievements	Yes	No
f. Education	Yes	No
g. Disciplinary	Yes	No
h. Interview	Yes	No
i. Accident or Injury	Yes	No
j. Bank Details	Yes	No
k. Union Details	Yes	No
l. Vehicle	Yes	No
m. Health	Yes	No
n. Appraisal	Yes	No

Additional Information



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Features

- 1. Will GDPR be enabled? Yes No
 - a. How many years to keep leaver data?
- 2. Will working time regulations be enabled? Yes No

Additional Information

Project Build: Absence Management

General

1. Will absence management be used? Yes No

Additional Information

Entitlement Policies

1. What entitlement policy formats are required?

a. Days Yes No

b. Hours and minutes Yes No

2. What entitlement policy date renewal types are required?

a. Fixed date Yes No

b. Person start date Yes No

3. Is accrued hours required? Yes No

4. Are years' service rules required? Yes No

5. Are carry over rules required? Yes No

Additional Information

Entitlement Information

- | | | |
|---|-----|----|
| 1. Display entitlement information? | Yes | No |
| 2. Sufficient entitlement check? | Yes | No |
| 3. Display entitlement forecast? | Yes | No |
| a. First check (months) | | |
| b. First trigger (percentage) | | |
| c. Second check (months) | | |
| d. Second trigger (percentage) | | |

Additional Information

Features

- 1. Display tactical absences? Yes No
- 2. Display rolling absences? Yes No
- 3. Display minimum staffing levels? Yes No
 - a. What grouping will this be based on?
 - b. What limits will be set? (percentage or fixed amount)
- 4. Enable return to work interview triggers? Yes No
 - a. Email out a standard pre-populated form? Yes No
 - b. What absence reasons will this trigger for?

Additional Information

Project Build: ESS Go

General

1. Will ESS Go be used? Yes No

2. How many employees?

Additional Information

Absences

1. Is 'Leave' required? Yes No

a. What absence reasons can be requested?

b. How many days' notice must be given?

c. How many months ahead can be requested?

d. Maximum number of days that can be requested?

e. Is a comment required? Yes No

Additional Information

Attendance

- 1. Is 'Attendance Point Booking' required? Yes No
- 2. Is 'Offsite Booking' required? Yes No
 - a. Is authorisation required? Yes No
 - b. Is a comment required? Yes No
- 3. Is 'Attendance Timesheet' required? Yes No
 - a. Which rates should be shown?
 - b. Should we display absences? Yes No
- 4. Is 'Shift Rota' (rolling 31 days) required? Yes No

Additional Information

Project Build: Attendance Adjustments

General

1. Will attendance adjustments be used? Yes No

Additional Information

Pay Rates

1. What pay rates are required?

2. Do we need to output absence hours to separate rates? Yes No

Additional Information

Schedule Rules

1. 1. Do schedules need an identifier?

2. Is overtime required? Yes No
a. Does it require authorisation? Yes No
b. Is pre/post shift required? Yes No
c. Is overtime only awarded once weekly contracted hours have been met? Yes No
d. Rules for rest days?

i. Contribute? Yes No
e. Rules for Saturdays?

i. Contribute? Yes No
f. Rules for Sundays?

i. Contribute? Yes No

3. Are rounding's required?

a. Do we need to round up or down?

4. Are core time infringements required?

a. Do we need to monitor brakes? Yes No

5. Are grace times required?

6. Are shift allowances required? Yes No

a. Does this apply to specific schedules? Yes No

Additional Information



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Features

1. Is period target shortfall required? Yes No

Additional Information

Project Build: Access Control

General

1. Will access control be used? Yes No

2. Which integration will be used?

Additional Information

Devices

1. Names of devices

Additional Information

Policies

1. Are policies required to restrict employee access? Yes No

2. Names and rules of policies

Additional Information

Project Build: Fire Roll Call

General

1. Will fire roll call be used? Yes No

Additional Information

Fire Alarm

1. Will timeware® be linking to the buildings fire alarm system? Yes No

2. What company supplies the fire alarm system?

Additional Information

Report

1. Will we be automatically generating a report? Yes No

a. Will this be sent via email? Yes No

b. Will this be printed? Yes No

Additional Information

Project Build: Reports & Exports

Reports

- 1. Does the customer have existing reports that we need to replicate? Yes No
 - a. Have examples been provided? Yes No
 - b. Does it need to match the existing report exactly? Yes No

Additional Information

Exports

- 1. Does the customer have existing reports that we need to replicate? Yes No
 - a. Have examples been provided? Yes No
 - b. Does it need to match the existing report exactly? Yes No

Additional Information

Payroll Integration

General

1. Will timeware® be integrating with a payroll system? Yes No

2. Payroll software name

Additional Information

Process

1. How often is payroll run?

Additional Information

Project Commissioning

Contacts

1. Project lead (for clarification purposes)
2. HR (for company procedure queries)
3. IT (for infrastructure queries, server access & admin rights)
4. Payroll (for general setup queries)

Additional Information

User Training

General

1. Will training be held onsite or remote via teams?

a. If onsite, where will the training be held?

b. Confirm tv/projector & server access will be provided Yes No

2. Type of training to be provided

a. Administrator Yes No

b. Manager Yes No

c. Other

Additional Information

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