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HR, Time and Attendance Software

ON PREMISE SOFTWARE

Training guide:

Dashboard and Report Viewer

Integration Point

ADP
Fire Alarm Roll Call
Assembly Point

Integration Point

Reports & Exports

Access Control

Integration Point

Integration Point

Payroll (licenced)

ESS GO (licenced)

Attendance

Cost Centre Analysis

Integration Point

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System

Leave Monitoring

Absence Management

Dashboards

Unauthorised

Personnel

To-do List

Integration Point

Statistics

Sickness

WTR
GDPR
Advanced

Integration Point

Integrated Management System

Citation ISO Certification

ISO 9001: 2015

ISO 27001: 2022

REGISTERED

Certificate No: 491342025

CYBER ESSENTIALS PLUS

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Contents

Course	Duration
An Introduction to the Dashboard and Report Viewer	Approximately 30 minutes

Description

Understanding the Dashboard and Report Viewer

New Application (External to timeware)

Understanding Company and Standard Dashboards and Reports

An Introduction to Dashboards	Approximately 30 minutes

Understanding Dashboards

Selecting a Dashboard Template

Configuring the properties of a Dashboard

Running a Dashboard

An Introduction to Reports	Approximately 30 minutes

Understanding Reports

Selecting a Report Template

Configuring the properties of a Report

Running a Report

Configuring a roll call report	Approximately 30 minutes

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

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Understanding the Dashboard and Report Viewer

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

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

▶ YouTube

Link to Understanding the Dashboard and Report Viewer

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

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New Application (External to timeware®)

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

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

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

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

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

Link to New Application (External to timeware®)
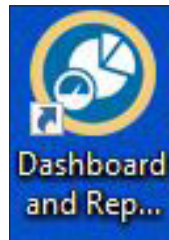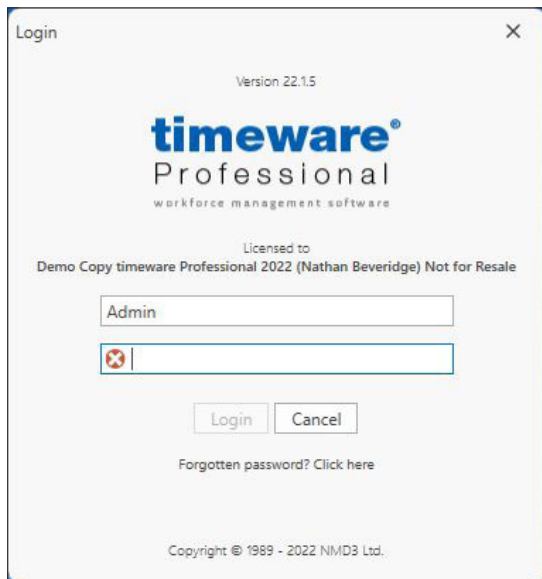
Understanding Company and Standard Dashboards and Reports

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

Company

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

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

Standard

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

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An Introduction to Dashboards

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

Examples of a few dashboards are:

Attendance Live View – This Dashboard is designed to provide managers with immediate and up to date information on their staff levels
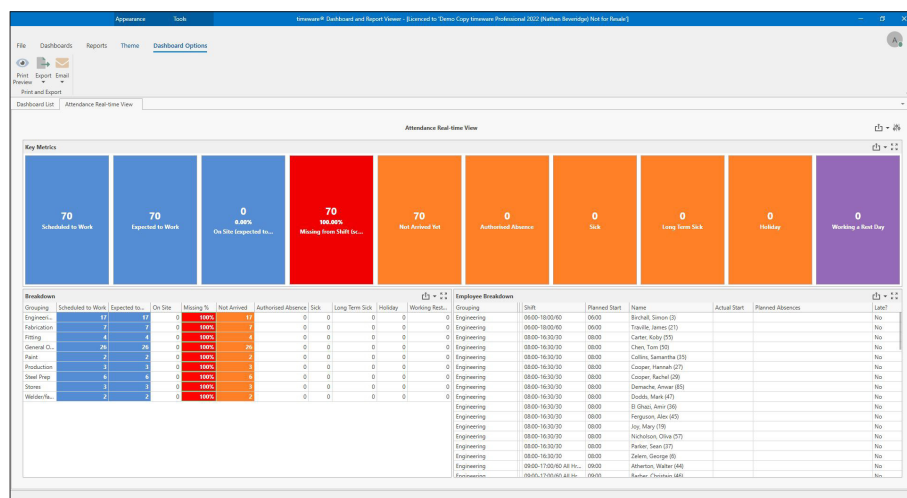
Personnel Headcount by Grouping – A quick and easy way to identify headcounts for various groupings within timeware® such as department, group or manager.
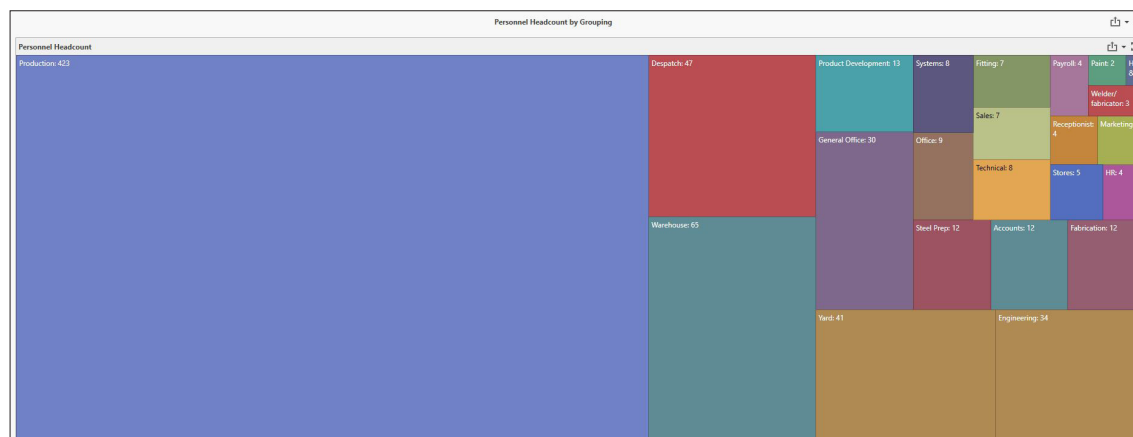
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Selecting a Dashboard Template

1. Log in to the timeware® Dashboard and Report Viewer
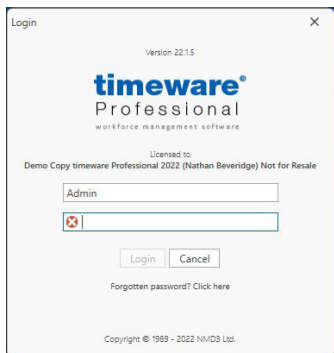
Link to Selecting a Dashboard Template

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

3. You will be presented with two 'columns' which are "Dashboard Templates" and "Chosen Dashboard Templates". The list on the left is all the available dashboards to you.
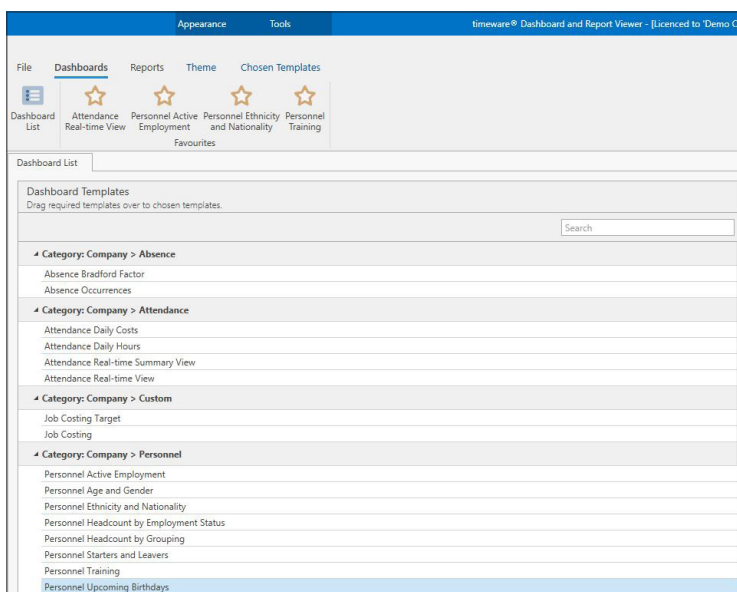
4. When you find a Dashboard you wish to run, left click on the template and drag it over to the right hand side ('Chosen Dashboard Templates'). You'll notice that the right-hand side of the screen will turn green while you are dragging the dashboard. If you see this, you are doing it correctly and just need to let go of the left click.

Dragging 1 record:
Attendance Daily Costs

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

Chosen Dashboard Templates

Search

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

▲ **Category: Company > Personnel**
Personnel Active Employment ★
Personnel Age and Gender
Personnel Ethnicity and Nationality ★
Personnel Headcount by Grouping
Personnel Training ★

▲ **Category: Standard > Attendance**
Attendance Daily Hours

▲ **Category: Standard > Custom**
Personnel Headcount by Employment Status
Personnel Headcount by Grouping
Personnel Starters and Leavers

▲ **Category: Standard > Personnel**
Personnel Ethnicity and Nationality

Configuring the properties of a Dashboard

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

▲ **Category: Company > Attendance**

Attendance Real-time View ⭐

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

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

Today
The present day, time 0:00-23:59.59

Yesterday
On the day preceding today, time 0:00-23:59.59

Rolling days
The rolling days inclusive of Today, a negative amount can be entered to go backwards exclusive of Today

Current pay period
Each persons current pay period, weekly, monthly...

Previous pay period
Each persons previous pay period, weekly, monthly...

Target pay period
Each persons pay period by a specified target date

Current month
The present month, from the 1st to the last day of the month

Rolling weeks
The rolling weeks inclusive of Today, a negative amount can be entered to go backwards exclusive of Today

Previous month
The previous month, from the 1st to the last day of the previous month

Rolling months
The rolling months inclusive of Today, a negative amount can be entered to go backwards exclusive of Today

Current year
The present year, from the 1st Jan to the 31st Dec 23:59.59

4. The next option on the left-hand side is "Employee Range". This is who you are going to be running the dashboard for. By default its going to show everyone your user can see if running a 'Standard' Dashboard or everyone at the company if running a 'company' Dashboard. You'll notice in the bottom right of the image it says "Count=755". So I know the dashboard is running for 755 employees.
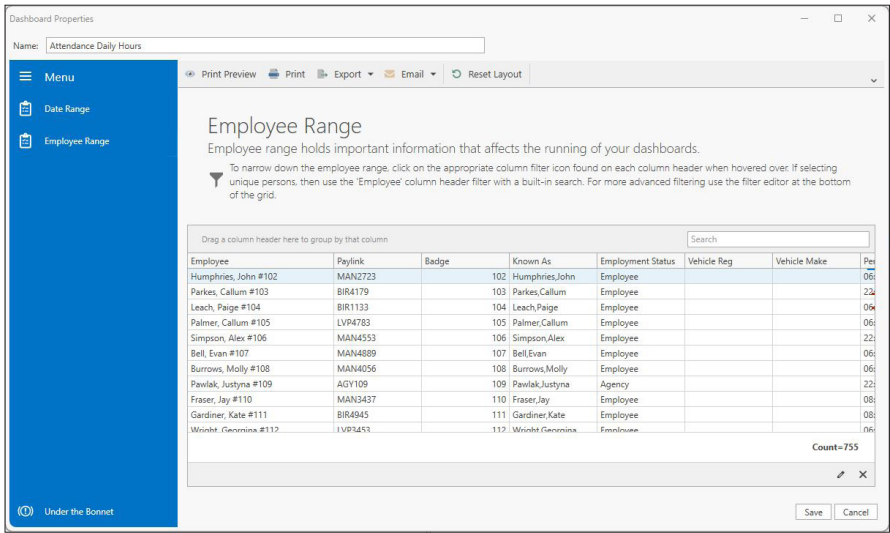
5. To narrow down the employees, firstly highlight the setting you wish to filter by. In my example I'm going to say I don't want to see leavers. I highlight over the "Employment Status" and it prompts me with a little Pin Icon.

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6. Click on the pin icon and it will present you with a way to select which options you want to show. In my example I only want to see employees
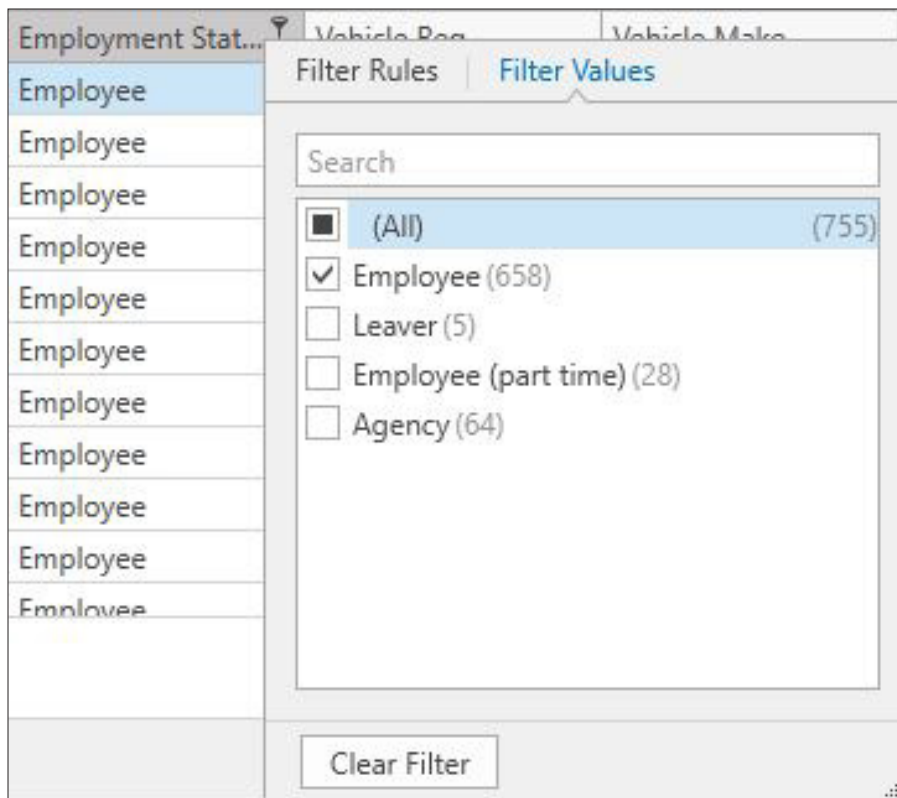
7. Once selected you'll notice that the count in the bottom right of the screen will have changed based off what you selected.

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

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Running a Dashboard

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

2. You've just ran a dashboard!

Link to Running a Dashboard

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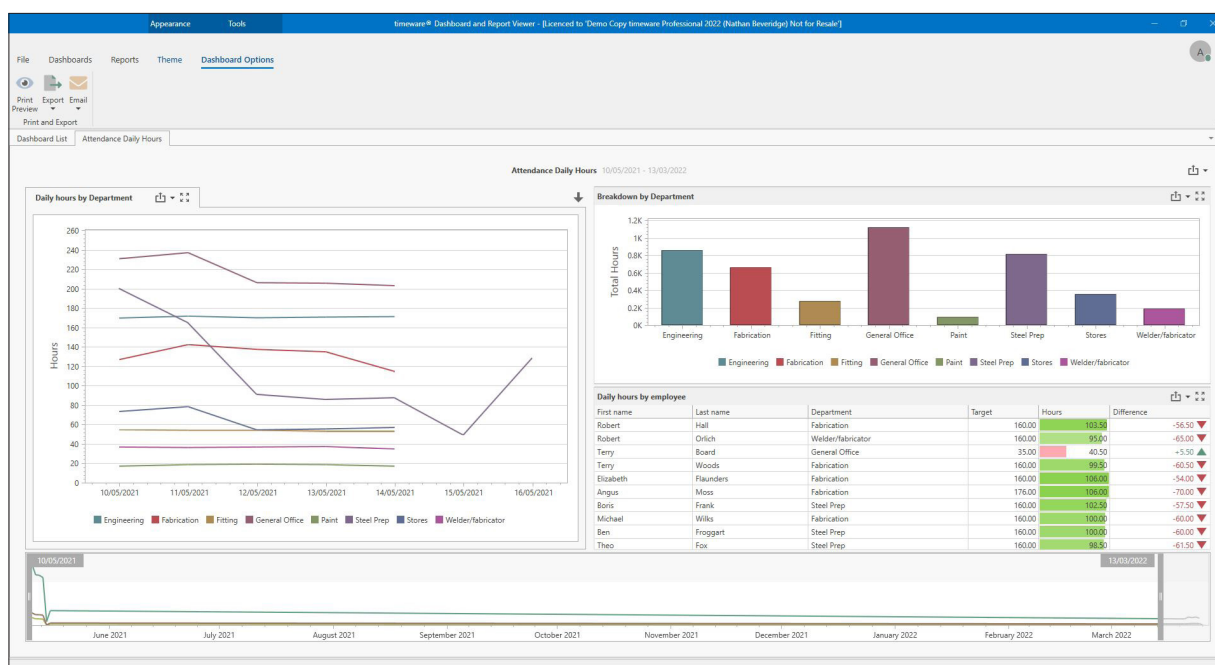support@timeware.co.uk
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An Introduction to Reports

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

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

Examples of a few of our reports are:

Attendance Daily Listing – Bread-and-butter attendance report to break down the hours for employees based on a daily level.
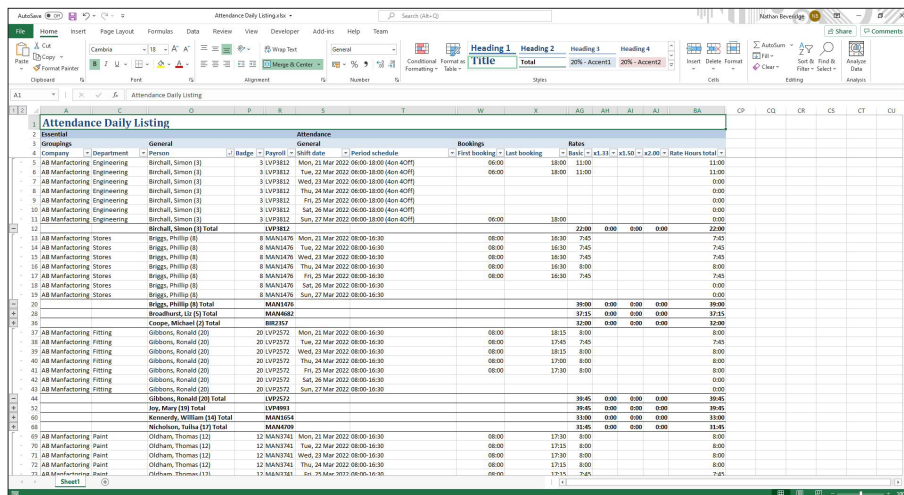
Absence Listing – Easily identify absences on the system i.e. holidays, sickness etc.

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Link to an Introduction to Reports

Selecting a Report Template

1. Log in to the timeware® Dashboard and Report Viewer
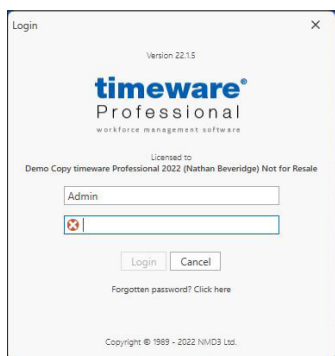
2. On the context menu at the top, select Reports and then click Report List
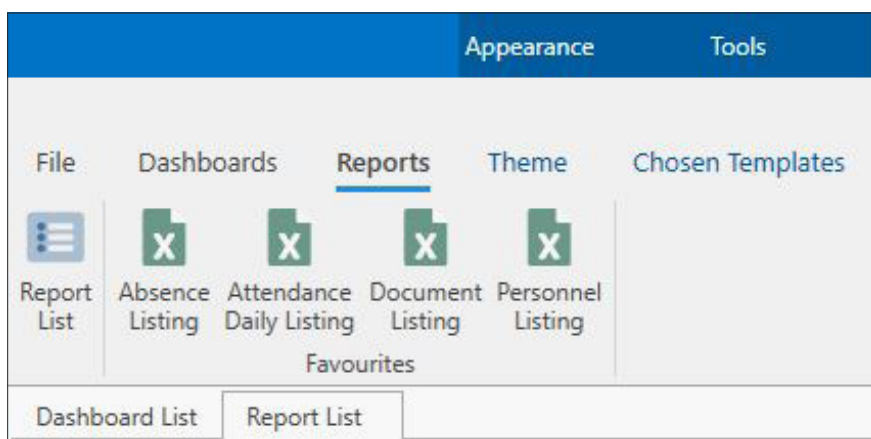
3. You will be presented with two 'columns' which are "Report Templates" and "Chosen Reports Templates". The list on the left is all the available reports to you.

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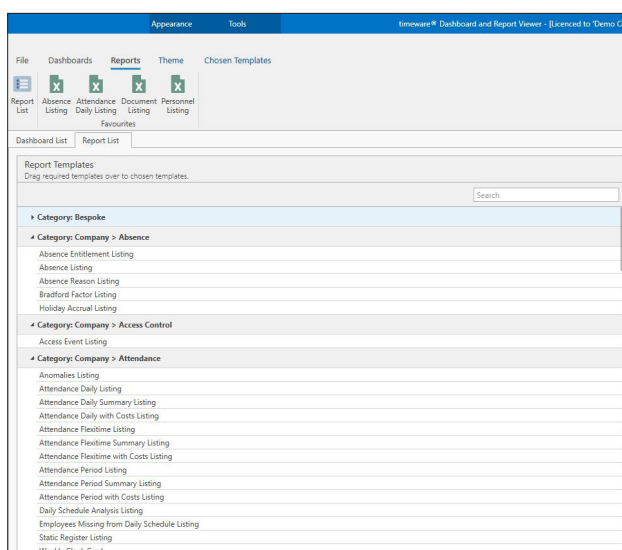
4. When you find a Report you wish to run, left click on the template and drag it over to the right hand side ('Chosen Reports Templates'). You'll notice that the right-hand side of the screen will turn green while you are dragging the Report. If you see this, you are doing it correctly and just need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

Dragging 1 record:
Attendance Daily Costs

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

Chosen Report Templates

Search

◢ **Category: Company > Absence**
Absence Listing ⭐
Bradford Factor Listing

◢ **Category: Company > Attendance**
Attendance Daily Listing ⭐

◢ **Category: Company > Dashboard Companion > Working Time Regulations**
WTR Overview

◢ **Category: Company > Personnel**
Disciplinary Listing
Document Listing ⭐
Employment Listing
Personnel Listing

◢ **Category: Standard > Personnel**
Personnel Listing ⭐

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Configuring the properties of a Report

1. Highlight the Report which you've previously selected in the last step of this tutorial. You'll notice a cog icon. This is the Report properties. Click on this to configure the Report.
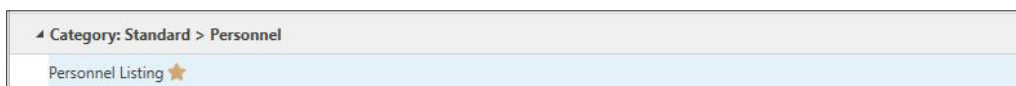
2. The First Screen you will be presented with is "Date Range". This is where you can configure the dates for the report. Please note that not all reports contain a date range as some don't require them. Ones that do not require them will have "None" in the range.

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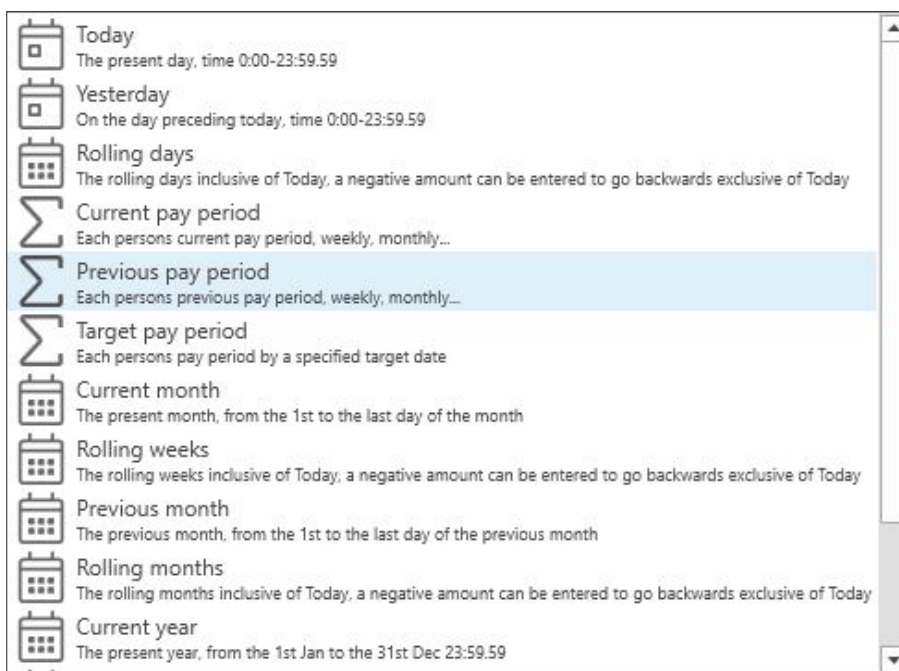
Link to Configuring the properties of a Report

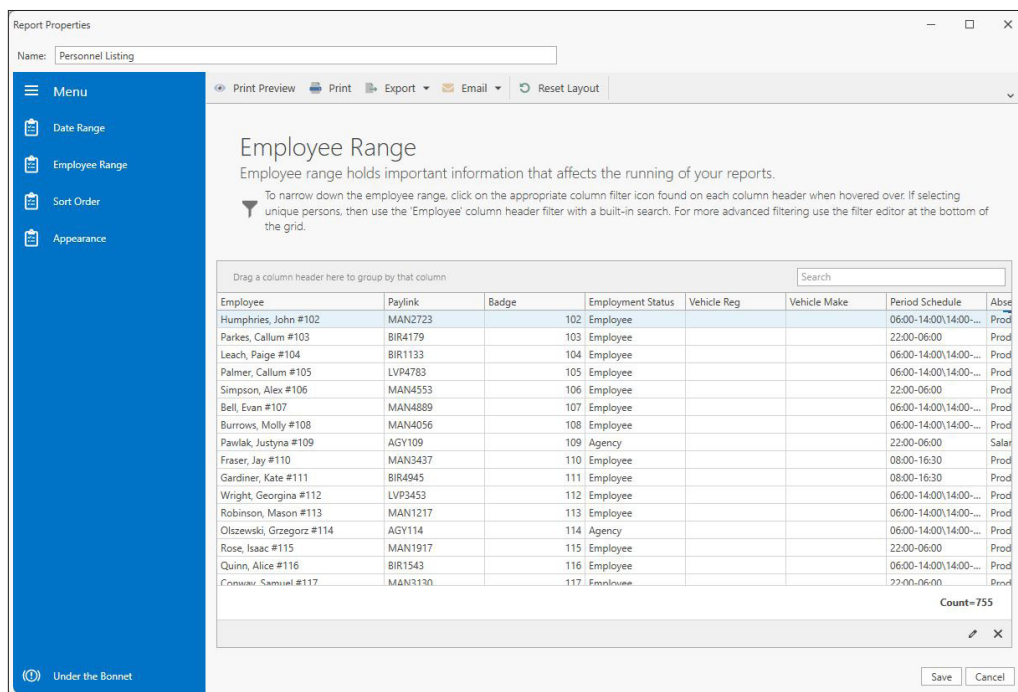**3.** The next option on the left-hand side is "Employee Range". This is who you are going to be running the report for. By default, it is going to show everyone your user can see if running a 'Standard' Report or everyone at the company if running a 'company' Report. You'll notice in the bottom right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

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

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5. Click on the pin icon and it will present you with a way to select which options you want to show. In my example I only want to see employees so I tick just employees. You can tick as many as you require !
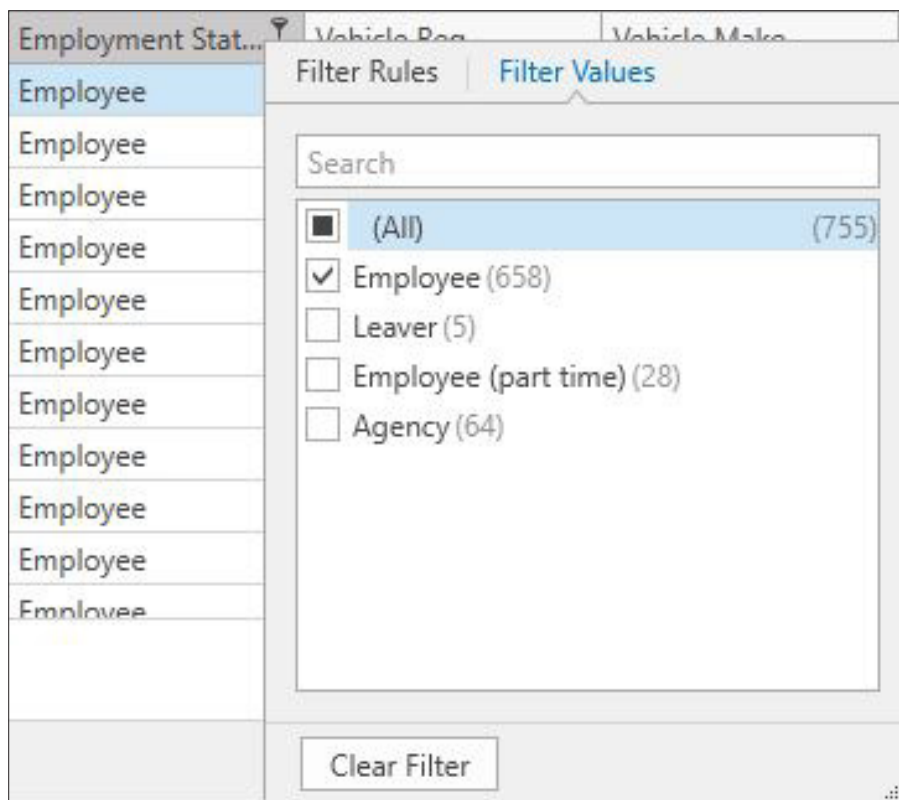
6. Once selected you'll notice that the count in the bottom right of the screen will have changed based off what you selected.

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

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

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

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

Ticking these options will add them as options to the show columns area as per the image below. If you want to remove any, untick them.
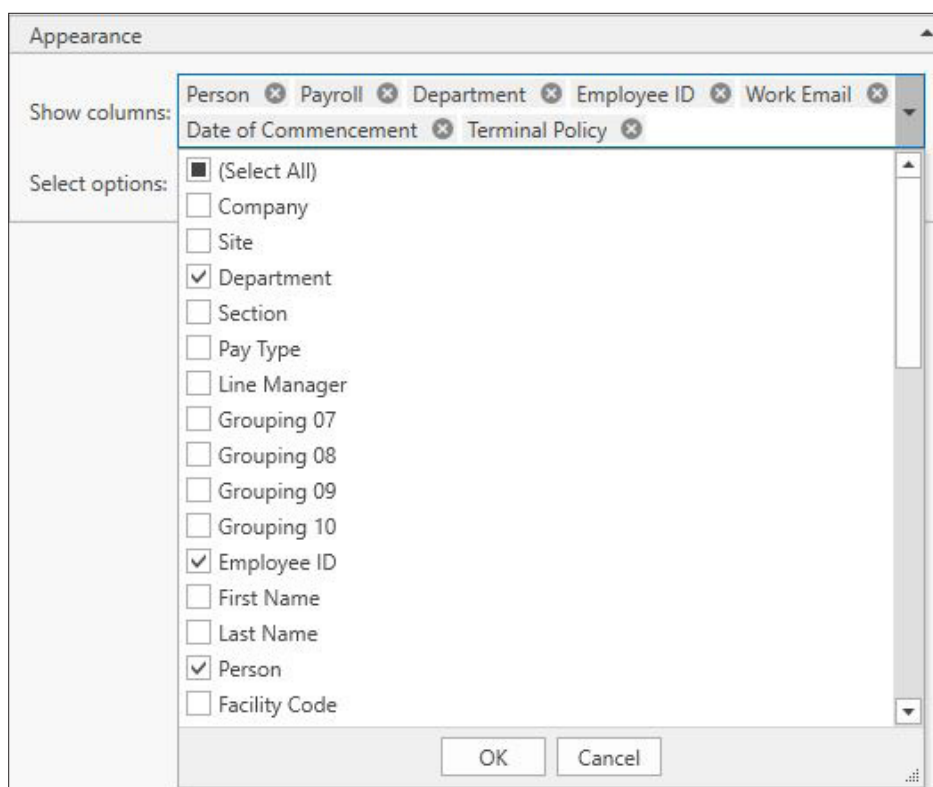
11. Once you are happy with the report properties, click Save in the bottom right.

Running a Report

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

◢ Category: Standard > Personnel

Personnel Listing ⭐

Link to Running a Report

2. You've just ran a report!

	C	L	O	R	V	X	AB
1	**Personnel Listing**						
2	Essential						
3	Groupings	General					
4	Department	Employee ID	Person	Payroll	Work Email	Date of Commencement	Terminal Policy
5	Production	370	Adamczyk, Agnieszka (370)	AGY370	Agnieszka.Adamczyk@notused.com	Tue, 4 Jun 2013	Factory Employees
6	Yard	675	Adamczyk, Artur (675)	AGY675	Artur.Adamczyk@notused.com	Wed, 5 May 2021	Factory Employees
7	Production	741	Adams, Ewan (741)	BIR3506	Ewan.Adams@notused.com	Fri, 22 Sep 1995	Factory Employees
8	Health & Safety	691	Adamska, Krystyna (691)	AGY691	Krystyna.Adamska@notused.com	Sat, 27 Mar 2004	Office Access Mon to Fri Only
9	Warehouse	253	Adamski, Olaf (253)	MAN2208	Olaf.Adamski@notused.com	Wed, 8 May 2013	Factory Employees
10	Warehouse	465	Ahmed, Mason (465)	MAN1838	Mason.Ahmed@notused.com	Sat, 28 Jul 2018	Factory Employees
11	Production	441	Akhtar, Owen (441)	MAN1361	Owen.Akhtar@notused.com	Fri, 22 Sep 2017	Factory Employees
12	Production	297	Alexander, Alfie (297)	MAN3498	Alfie.Alexander@notused.com	Thu, 17 May 2018	Factory Employees
13	Production	251	Ali, Sam (251)	MAN4666	Sam.Ali@notused.com	Fri, 9 Aug 2019	Factory Employees
14	Production	341	Allan, Danielle (341)	AGY341	Danielle.Allan@notused.com	Wed, 1 Jun 2011	Factory Employees
15	Warehouse	201	Allen, Dave (201)	LVP1680	Dave.Allen@notused.com	Thu, 11 Feb 2021	Office Access Mon to Fri Only
16	Production	225	Allen, Ellis (225)	BIR1104	Ellis.Allen@notused.com	Wed, 17 Jul 1991	Factory Employees
17	General Office	71	Allen, Lawrence (71)	BIR3791	Lawrence.Allen@notused.com	Mon, 22 Jan 2007	Factory Employees
18	Production	686	Anderson, Archie (686)	MAN3989	Archie.Anderson@notused.com	Tue, 27 Nov 2001	Factory Employees
19	Production	151	Anderson, Jack (151)	BIR1534	Jack.Anderson@notused.com	Fri, 26 Aug 1983	Factory Employees
20	Production	504	Andrews, Jamie (504)	MAN3472	Jamie.Andrews@notused.com	Fri, 8 Jan 1999	Factory Employees
21	Production	580	Archer, Elliot (580)	BIR1956	Elliot.Archer@notused.com	Sat, 26 Mar 1994	Factory Employees
22	Production	622	Armstrong, Louie (622)	BIR2840	Louie.Armstrong@notused.com	Sun, 12 Jun 2016	Factory Employees
23	Production	385	Arnold, Joe (385)	BIR4501	Joe.Arnold@notused.com	Sun, 10 Aug 2014	Factory Employees
24	Warehouse	205	Ashton, Emma (205)	LVP4251	Emma.Ashton@notused.com	Sat, 17 Jul 1999	Factory Employees
25	Engineering	44	Atherton, Walter (44)	MAN3957	Walter.Atherton@notused.com	Tue, 23 Jan 2007	Office Access Mon to Fri Only
26	Production	495	Atkins, Kian (495)	BIR2467	Kian.Atkins@notused.com	Sun, 13 Apr 1997	Factory Employees
27	Production	360	Atkinson, Zachary (360)	BIR2423	Zachary.Atkinson@notused.com	Fri, 25 Dec 2015	Factory Employees
28	Production	736	Austin, Bailey (736)	BIR3794	Bailey.Austin@notused.com	Wed, 5 May 1999	Factory Employees
29	Production	595	Bailey, Craig (595)	MAN1593	Craig.Bailey@notused.com	Thu, 30 Nov 2006	Factory Employees
30	Warehouse	374	Bailey, Harley (374)	BIR2300	Harley.Bailey@notused.com	Sat, 5 Mar 2011	Factory Employees
31	Production	129	Bailey, Molly (129)	BIR2288	Molly.Bailey@notused.com	Mon, 15 Aug 1988	Factory Employees
32	Production	283	Baker, Jodie (283)	BIR3460	Jodie.Baker@notused.com	Sat, 12 Apr 2014	Factory Employees
33	General Office	73	Baker, Tia (73)	MAN3115	Tia.Baker@notused.com	Wed, 24 Jan 2007	Factory Employees
34	General Office	74	Baker, Valentina (74)	MAN1254	Valentina.Baker@notused.com	Thu, 25 Jan 2007	Factory Employees
35	Production	740	Baldwin, Freddie (740)	BIR4952	Freddie.Baldwin@notused.com	Sun, 10 Feb 2013	Factory Employees
36	Production	150	Ball, Isaac (150)	BIR3446	Isaac.Ball@notused.com	Fri, 1 Aug 2003	Factory Employees
37	General Office	89	Ballson, Aaron (89)	MAN4012	Aaron.Ballson@notused.com	Fri, 26 Jan 2007	Factory Employees
38	General Office	82	Banks, Ronnie (82)	MAN1162	Ronnie.Banks@notused.com	Sat, 27 Jan 2007	Factory Employees

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Configuring a roll call report

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

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

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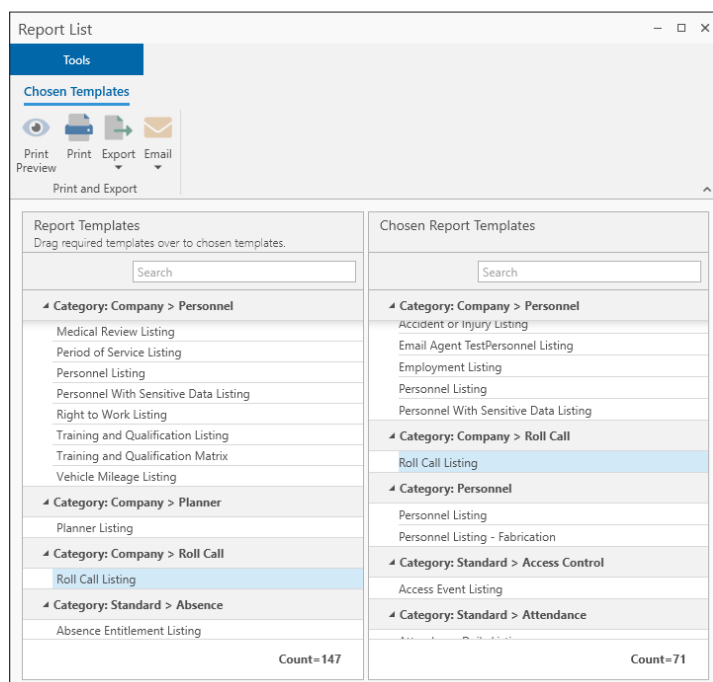
2. Report configuration for the Roll Call Listing is outlined in the Configuring the properties of a report section.

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

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

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