



Preface

The OverTime Equalization Module (OTE) was developed in order to answer a demand coming from the Car Industry Union of Ontario, Canada and was created according to its specifications.

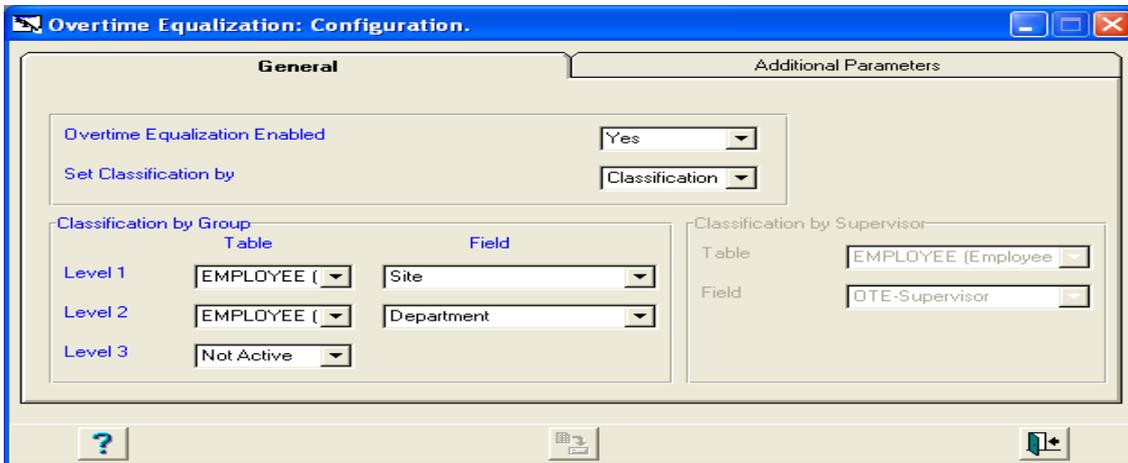
Environment

TK-SQL only. Database should be upgraded with the latest stored procedure from SQLDATASET. For that purpose it is necessary to import all stored procedures from SQLDATASET into the database in question prior to installing OTE.

Required Programs

RDOTESQL.DLL	June	21 2004 or later
DOTEDAYSQL.DLL	February	24 2005 or later
DOTEWEEKSQL.DLL	August	9 2004 or later
DOTECNF.DLL	November	15 2004 or later
DOTESUPERSQL.DLL	August	9 2004 or later
DOTECLASSSQL.DLL	August	9 2004 or later

Step 1: OTE Configurations



OTE – Configuration File Parameters (General Tab):

- Overtime Equalization Enabled: Yes/No.
- Set Classification by: Supervisor/Classification, this will set the work mode.
- Classification by Group: unlike the "BY Supervisor" classification, that enables a single grouping (i.e. by a single selected field from the employee master file), the "classification by group" has been specifically designed to group employees by multiple factors:

In the following example the classification group is set to site and Department: each subset of site and department is classified as a group (Group A, Group B, etc.):

Select Site from the 'Site' Selection Button

Select Site from the 'Department' Selection Button



and each group is assign to the OTE supervisor:

Select 'Classification Group' from the Selection Button.

- Classification by Supervisor: enables a single grouping by a single selected field from the employee master file.

In the following example the classification by Supervisor is set as File: Employee, Field: Int1 (OTE-Supervisor):

In this field we assign this employee to Supervisor In this example: Employee 1006 is assign to Supervisor 1101.



OTE – Configuration File Parameters (Additional Tab):

- Overtime Difference between highest to lowest within group (hours): Maximum difference between employee within the group with highest overtime accumulation and employee within group with lowest overtime accumulation.
- Minimal notice time for weekdays: Informative Field in OTE – Daily screen.
- Minimal notice time for weekend: Informative Field in OTE – Daily screen.
- New group member will be assign: When new member is assigned to a group/supervisor, should s/he be assigned with the group average or with the highest number + 1 (meaning assigned to the end of the list).
- Selecting out of class. Employee by: Categories for selection of employee out of classification.
- Overtime value: Should it calculate overtime value as nominal or real (according to category evaluation in TableA).
- Beginning of year initialization: General value for initialization of year: New accumulation starting at Zero hours, Initializing based on previous year average, Moving difference from the lowest employee.
- Sequential absence hours towards OT priority: Number of sequential Absence hours which credits the employee to be entitled to get not less than group average.
- Day Types for weekend: Selection of Day type for weekend from TableB.
- Enable OT separation weekdays/weekends: Yes/NO. Yes- will make all calculations and accumulations run separately for weekdays and for weekends.
- Employee field for excluding OTE calculation: any field from the employee screen that will exclude employees from participating in OTE calculations even when all other categories fit.
- Sort by "YTD in": Sort the OTE – Daily screen by "YTD in" field.
- Select non – group members by: Active only if working according to supervisor and will allow to select none-group members according to different order.



Step 2: OTE Daily screen

OT Equalization - Daily Screen

Total OT hours planned: 21/06/2005 Tuesday
 Group: 3 Group C
 Offered OT: 10.00 Unlimited
 Minimal Notice: 4.00
 Sort According to a Sort Profile: [Dropdown]

YTD In
 Total Hours: 6:00
 Average Hours: 0:23

Employee	Adjustment	Offered	Offered & Accepted	Offered & Refused	Actual	No Show	Reason	YTD In	Notice Given
1023 JORDAN ANDREW	Site 1	2.00	2.00	0.00	0.00	0.00	Electrical	2.00	Yes
1043 PARRA LUISA		2.00	0.00	2.00	0.00	0.00		2.00	Yes
1133 SMITH JOSEPH		0.00	0.00	0.00	0.00	0.00		0.00	Yes
1141 HILLMAN JAKE		0.00	0.00	0.00	0.00	0.00		0.00	Yes
1144 SAMPAT ORLANDO		0.00	0.00	0.00	0.00	0.00		0.00	Yes
1599 ZHAO RUJIN		0.00	0.00	0.00	0.00	0.00		0.00	Yes
1006 Burns Dave	Site 1	2.00	0.00	2.00	0.00	0.00	Painting	2.00	Yes
1016 MONRDE JANICE		0.00	0.00	0.00	0.00	0.00		0.00	Yes
1021 WATSON BRENDAN		0.00	0.00	0.00	0.00	0.00		0.00	Yes
1036 SEINFELD TED		0.00	0.00	0.00	0.00	0.00		0.00	Yes
1078 CLARK ARTHUR		0.00	0.00	0.00	0.00	0.00		0.00	Yes
1129 CARTIER SHIRLEY 1146		0.00	0.00	0.00	0.00	0.00		0.00	Yes
1051 SMITH CHRIS	Site 1	0.00	0.00	0.00	0.00	0.00	Quality	0.00	Yes
1110 MASTERS STEVE		0.00	0.00	0.00	0.00	0.00		0.00	Yes
1131 ROCCA LUISA		0.00	0.00	0.00	0.00	0.00		0.00	Yes
1136 FAZIO MERCEDES		0.00	0.00	0.00	0.00	0.00		0.00	Yes
Total Hours			2.00	4.00				6.00	
Average Hours								0:23	

Screen Buttons:



- Refresh screen.



- Select Group Number & Date.



- Add an Employee Out of Classification Group.



- Calculate (by date range).



- Initialize accumulated OT (from date).



- Consecutive Hours.



- Save Record.



- Exit.

Records Color Index:



- white Record: Lock Employee that was offered OT



- Blue Record: next Employee to offer.



- Red Record: Employee that is not from classification group.

Screen Header Fields:

- Total OT hours planned: Display the date we are editing.
- Group: Display the Group we are editing.
- Offered OT: Total Offered OT.
- Minimal Notice: Informative Field from OTE – Configuration file.
- Sort According to a Sort Profile: Sorting Profiles.
- YTD in: Total Hours - Total Hours (Offered & Accepted + Offered & Refused).
Average Hours - Total "YTD in" Hours divided total Employees in Group.



Screen Body Fields:

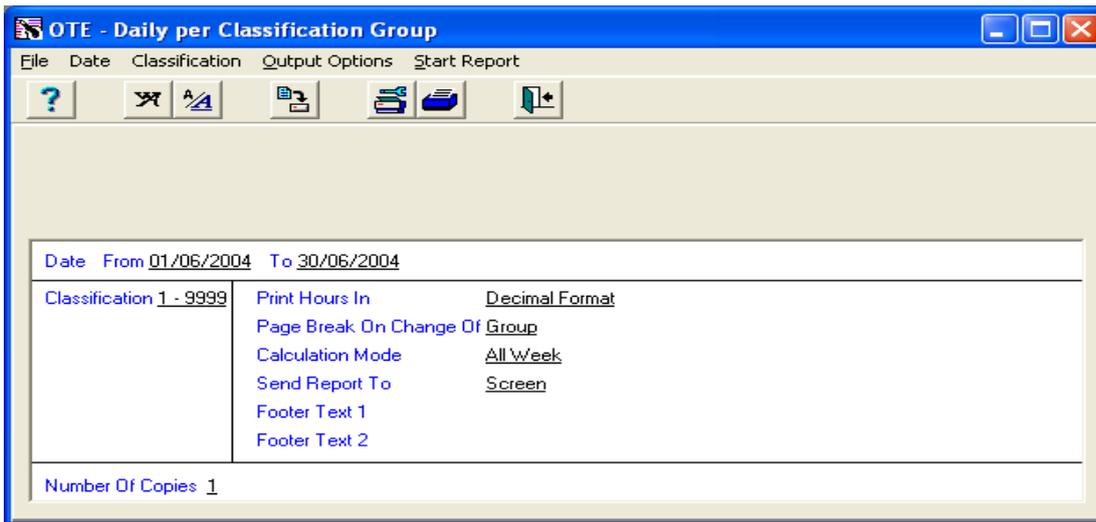
- Employee: Number of employee and Name
- Adjustment: Free data entry, which will affect YTD_IN
- Offered: Free data entry of overtime which will enable to update employees with lowest YTD_IN up to the maximum difference as defined in OTECNF.
- Offered & Accepted: Data entry for OT hours that **Accepted** by the employee.
- Offered & Refused: Data entry for OT hours that **Refused** by the employee.
- Actual: Actual overtime performed by employee (summation of categories specified in Parameter file – 'CALCOTE').
- No Show: Difference between offered overtime and actual overtime.
- Reason: Lookup on TableH.
- YTD IN: Accumulated overtime from beginning of year for employees within classification Group ('Offered' + 'Refused' + 'Adjustment' + 'Init Val' + 'No Show').
- Notice Given: Yes/No.



Step 4: OTE Reports:

1. Description: OTE – Daily Report By Employee.
Report Name: RDOTEQ1.
2. Description: OTE – Daily per Classification Group.
Report Name: RDOTEQ2.
3. Description: OTE – Weekly Report By Employee.
Report Name: ROTWEEK1.
4. Description: OTE – Weekly per Classification Group.
Report Name: ROTWEEK2.

Daily per Classification Group Report:



Employee	Prev Worked	Hours Worked	Hours Refused	No Show	Accum Hours	Notice Given	Reason
70010	0	0.00	1.00	0.00	1.00		
70014	0	0.00	1.00	0.00	1.00		
70022	0	0.00	2.00	0.00	1.00		
70027	0	0.00	0.00	2.00	2.00		
70028	0	0.00	2.00	0.00	2.00		
70037	0	0.00	1.00	0.00	1.00		
70042	0	0.00	1.00	0.00	1.00		
70069	0	0.00	1.00	0.00	1.00		
70124	0	0.00	2.00	0.00	2.00		
70143	0	0.00	2.00	0.00	1.00		
70160	0	0.00	1.00	0.00	1.00		
70172	0	0.00	2.00	0.00	2.00		
70185	0	0.00	4.00	0.00	2.00		
70190	0	0.00	2.00	0.00	1.00		
70195	0	0.00	4.00	0.00	2.00		
70202	0	0.00	8.00	0.00	4.00		
70203	0	0.00	0.00	2.00	2.00		
70206	0	0.00	0.00	0.00	0.00		
70212	0	0.00	0.00	0.00	0.00		
70229	0	0.00	0.00	0.00	0.00		
70251	0	0.00	0.00	0.00	0.00		
70255	0	0.00	0.00	0.00	0.00		
70259	0	0.00	0.00	0.00	0.00		
70240	0	0.00	0.00	0.00	0.00		
70248	0	0.00	0.00	0.00	0.00		
70250	0	0.00	0.00	0.00	0.00		
70255	0	0.00	0.00	0.00	0.00		
70262	0	0.00	0.00	0.00	0.00		
70263	0	0.00	0.00	0.00	0.00		
70265	0	0.00	0.00	0.00	0.00		
70267	0	0.00	0.00	0.00	0.00		
70268	0	0.00	0.00	0.00	0.00		
70293	0	0.00	0.00	0.00	0.00		
70294	0	0.00	0.00	0.00	0.00		
70296	0	0.00	0.00	0.00	0.00		
70298	0	0.00	0.00	0.00	0.00		
74305	0	0.00	0.00	0.00	0.00		
74307	0	0.00	0.00	0.00	0.00		



Weekly per Classification Group Report:

OTE - Weekly per Classification Group

File Date Classification Output Options Start Report

Classification 1 - 9999

Date From 21/06/2005 To 21/06/2005

Print Hours In Decimal Format

Page Break On Change Of Group

Classification In Group

Calculation Mode All Week

Send Report To Screen

Footer Text 1

Footer Text 2

Number Of Copies 1

OTE - Weekly per Classification Group

File Search Report

MikMik

1.8.4 Weekly Attendance/Overtime Report For 21/6/2005 - 27/6/2005

Page No. 21/06

Classification: In Group

Production Date...

Production Time...

Classification Group: 1 Specialty Fitter We Supervisor: PAYROLL TEST + PAYROLL TEST +

Classification 1 Specialty Fitter WI

Employee	Previous Balance-Y.T.I	Adjustmen	Tuesday		Wednesday		Thursday		Friday		Saturday		Sunday		Monday		Weekly Totals	Running Totals
			Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No				
70014 0 Raponi 0	120.87																	120.87
70018 0 Augello 0	165.87																	165.87
70019 0 Facchini 0	137.87																	137.87
70034 0 Gouveia 0	124.87																	124.87
70075 0 Saunders 0	125.87																	125.87
70110 0 Garden 0	126.87																	126.87
70120 1000 Corrigan 1000	96.87		10.00														10.00	96.87
70139 0 Matthews 0	107.87																	107.87
Total	996.93		10.00														10.00	1006.93
Average	124.62		1.25														1.25	125.87

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Page 1 of 1

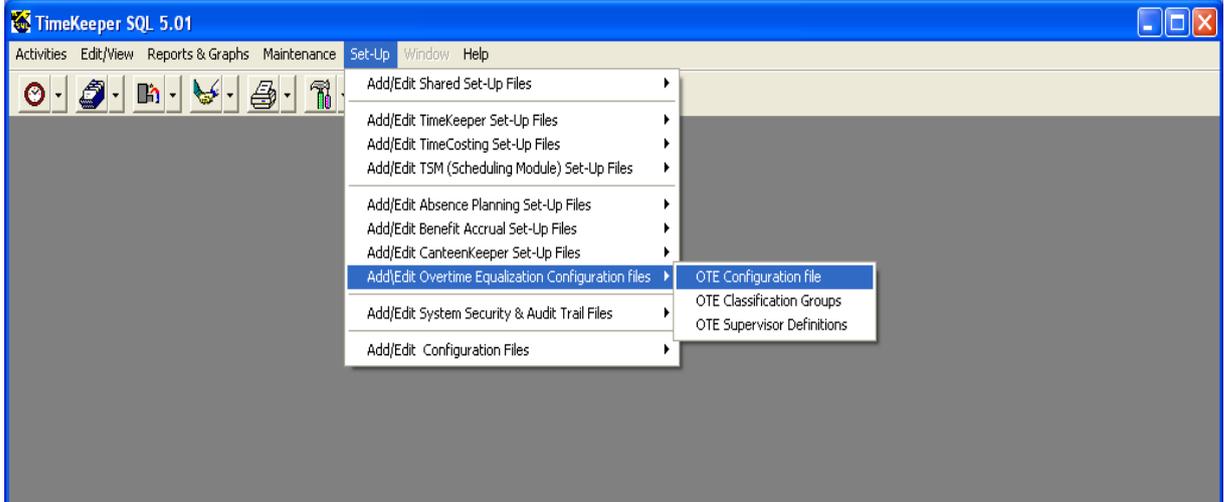


Detailed Example:

Overtime Equalization Module – by Classification:

Step 1:

- Add programs to Menu:

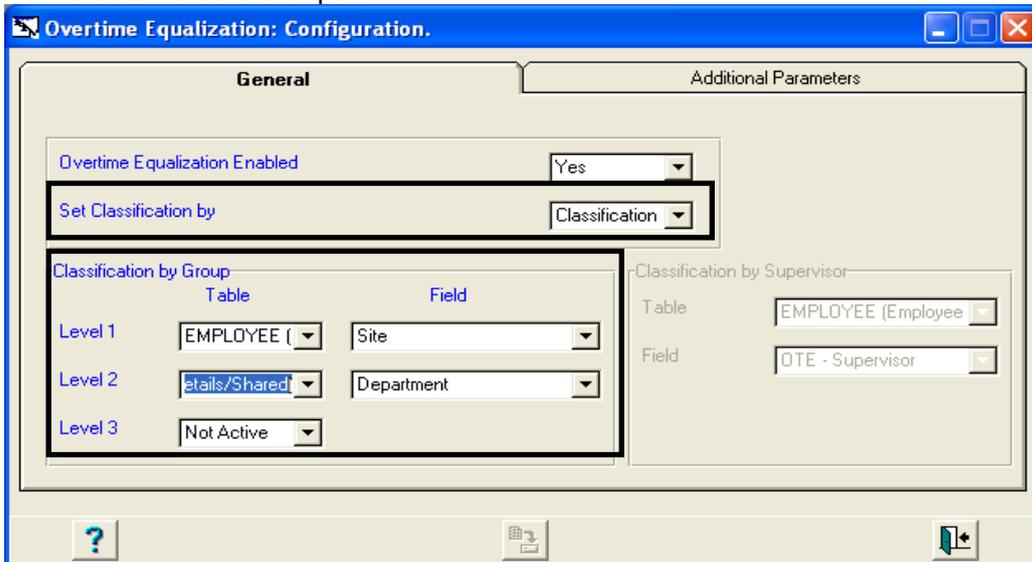


1. **OTE – Configuration File:** Program name: **DOTECNF**, Parameter: **0**.
2. **OTE – Classification Groups:** Program name: **DOTECLAS**, Parameter: **0**.
3. **OTE – Supervisor Definitions:** Program name: **DOTESUPE**, Parameter: **0**.

Step 2:

Overtime Equalization Configuration:

Define Classifications Groups.



Please note: that we are working in two levels in this example (Site, Department).



Define the Additional Parameters:

Overtime Equalization: Configuration.

General

Overtime Difference between highest to lowest within group (hours): 20:00

Minimal notice time for weekdays: 04:00

Minimal notice time for weekend: 08:00

New group member will be assigned: Group average

Selecting out of class. employees by: All Employees

Overtime value: Nominal

Beginning of year initialization: Zero Hour Value

Sequential absence hours towards OT priority: 00:00

Day Types for weekend: Select

Additional Parameters

Enable OT separation weekdays/weekends: No

Employee field for excluding OTE calculation: [Dropdown]

Sort by "YTD in":

Select non-group members by: Select

Step 3:

Build Classification Groups:

Build Groups and relate to each group site and department.

Classification Groups

Number: 1 | Name: Group A

Site: Selection

Department: Selection

Site

NUMBER	NAME
1	TimeTech

Department

NUMBER	NAME
1	Management
2	Customer Service
3	Electrical
4	Mechanic Engineering
5	Painting
6	Assembly
10	Quality Assurance
13	Operations



Step 4:

Build Supervisor for OTE System:

Please Note:

- 1. OTE supervisor must be Timekeeper user.
- 2. Timekeeper user must have active employee details relate to the user profile.

The 'Users' window shows configuration for user '1141'. The 'General Parameters' tab is active. The 'System Administrator' checkbox is checked. The 'Employee Number' is 1006, 'Employee Last Name' is BURNS, and 'Employee First Name' is DAVE.

OTE supervisor:

The 'Supervisors for OTE system' window shows the 'OTE Supervisor' set to '1141'. The employee details are '1006', 'Burns', and 'Dave'. A 'Selection' button is circled, with an arrow pointing to the 'Classification Group' window.

Number	Name
1	Group A
2	Group B
3	Group C

Buttons: Clear All, Select All, OK, Cancel



Step 5:

Login with user: **1141**.

Overtime Equalization Daily Screen:

Select update range

Classification

No. Name

Update from date

Ok Cancel

OT Equalization - Daily Screen

Total OT hours planned: 26/06/2005 Sunday YTD In

Group: 1 Group A Total Hours: 0:00

Offered OT: 0.00 Unlimited Average Hours: 0:00

Minimal Notice: 4.00

Sort According to a Sort Profile

Employee	Adjustment	Offered	Offered & Accepted	Offered & Refused	Actual	No Show	Reason	YTD In	Notice Given
1119 SHEPPERD MATT	0.00	0.00	0.00	0.00	0.00	0.00	Manager	0.00	Yes
1023 JORDAN ANDREW	0.00	0.00	0.00	0.00	0.00	0.00	Electrical	0.00	Yes
1043 PARRA LUISA	0.00	0.00	0.00	0.00	0.00	0.00		0.00	Yes
1133 SMITH JOSEPH	0.00	0.00	0.00	0.00	0.00	0.00		0.00	Yes
1141 HILLMAN JAKE	0.00	0.00	0.00	0.00	0.00	0.00		0.00	Yes
1144 SAMPAT ORLANDO	0.00	0.00	0.00	0.00	0.00	0.00		0.00	Yes
1599 ZHAO RUJIN	0.00	0.00	0.00	0.00	0.00	0.00		0.00	Yes
1006 Burns Dave	0.00	0.00	0.00	0.00	0.00	0.00	Painting	0.00	Yes
1016 MONROE JANICE	0.00	0.00	0.00	0.00	0.00	0.00		0.00	Yes
1021 WATSON BRENDAN	0.00	0.00	0.00	0.00	0.00	0.00		0.00	Yes
1036 SEINFELD TED	0.00	0.00	0.00	0.00	0.00	0.00		0.00	Yes
1078 CLARK ARTHUR	0.00	0.00	0.00	0.00	0.00	0.00		0.00	Yes
1129 CARTIER SHIRLEY 1146	0.00	0.00	0.00	0.00	0.00	0.00		0.00	Yes
Total Hours			0.00	0.00				0.00	
Average Hours								0.00	