

The Year To Date tracking system is used to visually display patterns of time and attendance habits over a period of time (up to a full year). Year To Date data may be viewed graphically to enable pattern tracking of a given employee's work habits (for example - visually displaying the times a given employee arrived late or was out early etc.).

The system is easily defined through two main configuration screens:

- 1. The Y-T-D definitions tab located in the TKSQL configuration screen (SYSCNF).
- 2. The "Select Values to Display" dialog box located in the Y-T-D visual pattern tracking screen.

The system's output is the visual pattern tracking system and two reports (Attendance Totals Chart and the Annual Activity Chart).

#### Year To Date definitions tab:

The Year To Date definition tab is used to specify the fields you wish to track over the course of years, a total of eight fields may be specified for the Y-T-D system (meaning that eight different types of patterns can be displayed simultaneously). Through the definition tab the user composes all of the tracking patterns general parameters, these consists of the following -

- 1. Value Type these select the data type to be used in the Year To Date definition, these may consist from:

  - A field from the Daily File any field that appears in the daily file.
     An absence vector value early entry, late entry, early exit, late exit, break, lunch etc.
  - > An expression a mathematical expression.
- 2. Value According to the Value Type selected, the specific value that derives from it must now be selected according to the following details:

If the Value Type is set to the Daily File, any value from the daily file can be selected.

If the Value Type is set to an absence vector value, you can select one of the following values:

- > Actual -Returns the actual value of the selected absence vector.
- Actual Round -Returns the rounded value of the selected absence  $\triangleright$
- vector. Value To Pay -Returns the value to be paid of the selected absence  $\triangleright$
- vector. > Absence Value - Returns the value of the Absence for the selected
- absence vector. Absence Code - Returns the Absence code for the selected absence vector

If the Value Type is set to expression, use the Expression Builder to set a value.

- 3. Decimal Type Select the data format for the specified value:
  - Number Type Used for numeric values.
  - HH.MM Used for time values.  $\geq$
  - Number Type/HH.MM without summaries this type is the same as  $\geq$ the previous two except it would not be summarized in the Annual Activity Chart.
- 4. Description for every definition a description must be entered, this description appears later in the visual pattern tracking (V.P.T) module and the Y-T-D reports.

Please note - In case the user needs to track absence codes it is recommended that two value be assigned for the task - one for the actual code as a number without summaries and another for the absence hours as a HH.MM decimal type (for an example look at figure 1).



For further assistance look at **figure 1**.

System Configuration					
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<ul> <li>System Configuration</li> <li></li></ul>	Number	Value Type	Y-T-D Definitions Value	Decimal Type	Description
<ul> <li>Date &amp; Time</li> <li>Printer &amp; Printing</li> <li>Daily File Structure</li> <li>Employee File</li> <li>External Programs</li> <li>Key Fields Format</li> <li>BackUp</li> <li>Ibrowse</li> <li>Time Clock (Polling)</li> <li>Payroll Interface</li> <li>Y-T-D Definitions</li> </ul>	1 2 3 4 5 6 7 8	Field From Daily Expression Field From Daily Expression Abs.Vec Value On Abs.Vec Value On	REG_HRS DAYCATHH(2,8) Absence Code DAILY->Abs_wag Actual Actual	HH.MM HH.MM Number without Number Type HH.MM HH.MM	Regular OT Abs Code Abs Hours Late Entry Left Early
<ul> <li>Program Extensions</li> <li>Absences</li> <li>Time Scheduling (TSM)</li> <li>E-Mail</li> </ul>					

Figure 1.



# Table H:

- 1. Through table H select for all the absence codes you wish to keep track of in the Y-T-D, the parameter "Included in Y-T-D absence Tracking" located in SubSystems tab.
- 2. Select a color for each absence code through the "Absence Code Color" parameter located in Absence Properties tab.

For example:	
Table H - Absence Type Definitions	
Group No Group Name Absence	Type Description Short Description     VACATION PAID     VAP
Tracking Period Parameters Rounding Options	Additional
Basic Parameters Absence Properties	SubSystems Tracking Control Parameters
Pay Absence for TC/DA Absences are Linked to Default Job	TAKSHIR Counts as a Work Day for Accrual Purposes Counted as Working Day for Sick Disrupts Vacation Continuity
STAT Holiday Mode Disabled	
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🚻 Table H - Absence Type	Definitions			
Group No Gr 1 Standard	oup Name Absence Corporate Abse	e Type Description VACATION PAID	Short Description	
Tracking Period Parameters	Rounding Options	Additional		
Basic Parameters	Absence Properties	SubSystems	Tracking Control Parameters	
Absence Properties      Counts as a Standard Work Day      Counts as an Actual Work Day      Triggers ERROR on Attendance      Adjust calculations according to Partial Job %      Base Allowance On Partial Job Percent      Pays Breaks / Meals      Not Paid      Absence Continuity Mode Set by      Week Days      Veek Days		Disqualifies Attendance Premium Disqualifies Punctuality Premium Disqualifies Early Exit Premium Attachment Required Valid Date Range From / To / Absence Code Color		
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The user can now use the Year To Date graphically and display this information through the visual pattern tracking (V.P.T) module.

🚾 Year To Date			
Employee Number	Employee Last Name 👘	Employee First Name 👘	Year
1 ± t	ob 🛃	r 1!	998 🗲
Month Dav Mc Tu We Th Pr Sa Jaconary	Su Mc Tu We Th Pr Ss Su Mc Tu We Th Pr	35 Su Mc Tu We Th Pr Ss Su Mc Tu We Th 17 18 19 20 20 20 23 24 25 26 27 28 29	Pr Sa Su Mc Tu 30 31
February	<b>1</b> 2 3 4 5 6 7 <b>8</b> 9 10 11 12 13	14 <b>15</b> 16 17 18 19 20 21 <b>22</b> 23 24 25 26	27 28
March		14 15 16 17 18 19 20 21 22 23 24 25 26 18 10 20 21 22 23 24 25 26 27 28 20 30	27 28 29 30 31
May 12	<b>3 4 5 6 7 8 9 10 11 12 13 14 15</b>	16 17 18 19 20 21 22 23 <b>24</b> 25 26 27 28	29 30 31
June 123456	<b>7</b> 8 9 10 11 12 13 <b>14</b> 15 16 17 18 19	20 21 22 23 24 25 26 27 28 29 30	24
	<b>2</b> 3 <b>4</b> 5 <b>6</b> 7 8 <b>9</b> 10 11 12 13 14 15 16 17	15 16 17 18 19 20 21 22 23 24 25 26 27 26 29 30	28 29 30 31
September 12345	<b>6</b> 7 8 9 10 11 12 <b>13</b> 14 15 16 17 18	19 20 21 22 23 24 25 26 27 28 29 30	
November	<b>a</b> 5 6 7 8 9 10 <b>11</b> 12 13 14 15 16 <b>1</b> 2 3 4 5 6 7 8 9 10 11 12 13	17 18 19 20 21 22 23 24 25 26 27 28 29 14 15 16 17 18 19 20 21 22 23 24 25 26	27 28 29 30
December 12345	6 7 8 9 10 11 12 13 14 15 16 17 18	19 20 21 22 23 24 25 26 27 28 29 30 31	
Date	Name	Value	Selected Color
01/01/1998	o.t	3:00	E
01/02/1998	o.t	3:00	
01/04/1998	o.t	3:00	
01/05/1998	0.(	3:00	
2			

## Visual pattern tracking (V.P.T) module:



The V.P.T module enables the user to assign each value defined in the configuration screen a particular color and expression function – the end result of that is the appearance of the assigned color on the calendar whenever the expression is true. The modules main screen consists of two halves –

- The upper half is the module's calendar every time one of the values designed in the system's configuration is "true", it's day of occurrence is colored.
- The lower half specifies every occurrence's date, name, value and designated color.

In order to activate a defined value, set the following parameters –

Through the "select values to display" button at the bottom of the V.P.T screen the values selection screen is opened, each of the values built in the configuration screen would appear in the screen (designated by it's description) with a check box assigned to it.

Checking a certain value's check box would activate it in the V.P.T system – this means that the V.P.T would now display it's given color whenever that value would occur.

(Example – if the chosen value was configured as the overtime hours category in the daily file, the V.P.T would display it's given color on any day that overtime hours were calculated).

Note that all of the designed values can be displayed simultaneously on the calendar, in case of a conflict between two or more values the "higher" value would be displayed (however all of the values would be specified in the lower half of the screen).

The rest of the configuration is optional –

- Color in order to distinguish between the different displayed values a different color can be assigned to each value through the "color" button (note that the default color for any value is blue)
- Expression a limiting expression can be assigned to any value through the expression button, thus enabling the user to define a display condition for any designed value.





Example – in the case of the overtime hours a limiting expression can be set to display it's occurrence only if the overtime hours exceed a value of 1 hour in the following manner: YTD->VAL\_1\_2>1.00

For further assistance look at picture below:

Sel	ect Values To Display		×
E		Color YTD->VAL_1_1<-2.00	<u>Expression</u>
E	<b>C</b> O.T	<u>Color</u> YTD->VAL_1_2>1.00	
F	Abs. Code		<u>Expression</u>
F	C Abs. Hours	<u>C</u> olor	<u>Expression</u>
F	CLate Entry	<u>C</u> olor	<u>Expression</u>
F	CEarly Exit	<u>C</u> olor	<u>Expression</u>
		<u>O</u> k <u>C</u> ancel	

Figure 3.

**TimeKeeper** 



### Y-T-D Reports:

In addition to the V.P.T module the system's output consists of two reports -

1. Annual Activity Chart -

The annual activity chart is a calendar report similar in it's appearance and output to the V.P.T module, it differs from it by two major factors –

- Instead of coloring each day according to the value definitions it prints the actual value registered for every colored day Example – in the overtime example presented before, every day when overtime was achieved the report would print the actual amount of overtime hours done in that day.
- The left part of the report consists of a short table totaling 10 absence types that were found in selected year.
   Each of the 10 absence codes would be displayed by its designated short description (in Table H), the table would summarize the number of occurrences of each absence code (per month).
   The absence codes that would be displayed in the report are the first 10 codes that were defined in the report's select screen (for example if in the report's select screen absence codes 0-100 were selected, the absence codes that would be displayed in the report would be the first 10 codes found within that range).

Annual activity report parameter file (RYTD1) – the RYTD1 parameter file enables the user to control the annual activity report's actions in case of a conflict between two or more defined values (a similar problem occurs in the V.P.T however in the V.P.T the system simply displays the "higher" value and specifies all the values in the lower part of the screen).

The parameter file displays the order of "importance" for all the eight possible values (the default is simply 1,2,3...) that order can be changed if needed.

In the parameter file you can control which values are to be displayed in the report (from all the definition lines you defined in the SYSCNF) and what value should be displayed in case of a conflict between two YTD values that occurred on the same day.

Each line in the parameter file represents a priority level for one of your definitions, so that whatever definition you've assigned to line number 2 would be displayed ONLY if the definition that you've assigned to line number 1 has a value of 0.

For example – in the figures bellow a particular day's absence code would be displayed in the report, if an absence code was not assigned for that particular day then the report would display the amount of that day's O.T and if no O.T was accumulated that day then the amount of LATE ENTRY minutes would be displayed.

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System Configuration     General Configuration			VID D.C.S.		
<ul> <li>General Configuration</li> <li>Dealer</li> <li>Becurity &amp; Authorization</li> </ul>	Number	Value Type	Value	Decimal Type	Description
💟 Language 🔊 Date & Time	1	Field From Daily	REG HRS	НН.ММ	Regular
Printer & Printing	2	Expression	DAYCATHH(2,8)	HH.MM	OT
📑 Dailu File Structure	3	Field From Daily	Absence Code	Number without	Abs Code
Employee File	4	Expression	DAILY->Abs_wag	Number Type	Abs Hours
External Programs	5	Abs.Vec Value On	Actual	HH.MM	Late Entry
Key Fields Format	6	Abs.Vec Value On	Actual	HH.MM	Left Early
Backlin	7				
T I Browse	8				
<ul> <li> <ul> <li>iBrowse</li> <li>ime Clock (Poling)</li> <li>Payroll Interface</li> <li>Y-T-D Definitions</li> <li>Program Extensions</li> <li>Absences</li> <li>Time Scheduling (TSM)</li> <li>E-Mail</li> </ul> </li> </ul>					



👕 Parameters' File	es Table
File Name	
RYTD1	prm for Absence &Occurance R RABSYTD
Add Group	Group Lines' Content In The Current Group  I Values for output  Remove Group
Line	Line Contents
1	3,
2	2,
4	
5	×
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	Figure 5.

In order to define which values are NOT to be shown in the report simply don't assign them a priority level in RYTD1 parameter file (just blank out their line number in the parameter file), for example – in the above setup the values that would not appear in the report are:

Regular hours (line number 1 in the SYSCNF), the day's Abs hours (line number 4 in the SYSCNF), the left early hours (line number 6 in the SYSCNF).

All these definitions would not appear in the report because the parameter file does not hold a priority level for lines number 1,4 and 6.

However it is recommended that only experienced users use this option since inexperienced use of the parameter files can cause intensive damage.

## 2. Attendance Totals Chart –

The attendance totals chart is a yearly report that summarizes each of the values defined in the main configuration screen on a monthly, quarterly and annual basis. Note that this report does not take into account any expressions defined in the V.P.T module.

Attendance Totals Chart parameter file (RATTYEAR) - the RATTYEAR parameter file enables the user to control the Attendance Totals Chart's displayed values (in a similar manner to the RYTD1 parameter file), this is required because the report can display only 6 of the eight available Y-T-D fields.

The parameter file specifies in line No.1 which six values would appear in the repot (please note that these are entered in just one line).

#### Things to remember –

The Y-T-D system is based on the periodic calculations, in order for a certain change to take effect the pay period must be summarized.