TimeKeeper Analytics

Quick Reference Guide

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Introduction

About this Guide

This guide is intended to provide a quick guide and tutorial to the principal features of **TimeKeeper Analytics**, enabling you to get the product "up and running". For more detailed procedures and explanations, please refer to the *TimeKeeper Analytics User Guide*.

Lavie TimeTECH

Welcome to the Lavie TimeTECH family of software for Time and Attendance Management Systems.

Lavie TimeTECH is one of the world's leading suppliers of Time and Attendance Management. Our package of advanced T&A solutions, installed at multiple sites around the world, gives employers a key advantage. It helps them to standardize all manpower operations while significantly increasing efficiency and responsiveness.

About TimeKeeper Analytics

TimeKeeper Analytics is a comprehensive business intelligence module that helps you improve workforce performance. This Executive Information System (EIS) analyzes data from Lavie's TimeKeeper's time and attendance and TimeCosting's labor/task allocation modules and displays them in graphic form. You can filter, shape, drill down, and re-display the data according to your organizational needs and receive answers to your questions regarding your organization's performance. TimeKeeper Analytics helps you make decisions that reduce costs, increase effectiveness, and improve employee satisfaction.

Intended Audience

This manual covers the functionality and use of the TimeKeeper Analytics module from the TimeKeeper suite of products.

This guide is intended for managers, supervisors, and other authorized personnel who wish to perform the actions listed above. Basic computer skills are assumed but no significant technical knowledge is needed. Previous knowledge and experience with additional and related Lavie modules is advantageous but not vital.

Installation

For installation and activation procedures, see the *TimeKeeper Analytics User Guide*.

Getting Started

- To read a brief overview of TimeKeeper Analytics, its functionality, usage, and benefits, go to How TimeKeeper Analytics Works.
- To learn about TimeKeeper Analytics' main interface, go to Main Screen.
- To view and filter graphic representations of the daily attendance data accumulated by the TimeKeeper module, go to Daily and Pay-Period Attendance.
- To view and filter graphic representations of the period attendance data accumulated by the TimeKeeper module, go to Daily and Pay-Period Attendance.
- To view and filter graphic representations of the daily job allocation and labor distribution data accumulated by the TimeCosting module, go to Daily and Pay-Period Attendance and Daily and Pay-Period Jobs.
- To view and filter graphic representations of the periodic job allocation and labor distribution data accumulated by the TimeCosting module, go to Daily and Pay-Period Attendance and Daily and Pay-Period Jobs.
- To create custom reports for daily periods and pay period cycles for the attendance and job allocation/labor distribution level, go to Creating User-Defined Analysis Screens.

How TimeKeeper Analytics Works

TimeKeeper Analytics is simple, easy, and intuitive to operate.

The main screen has two main investigative modules: *Timekeeper* (relating to time and attendance, such as absences, overtime hours, daily attendance, pay categories, etc.) and *TimeCosting* (relating to labor costs, task durations, rates, quantities, and active and non-active tasks, etc). Each of these modules has two levels of sub-modules, *daily* and *periodic*.

- The *daily* level refers to date ranges of single days to multiples thereof and includes calculations relating to daily entry and exit data analyses.
- The *periodic* level refers to an entire pay period or to several periods, but not to a range of dates representing only part of the month. In addition, this level also takes into consideration the end-of-period related calculations such as periodical overtime thresholds.

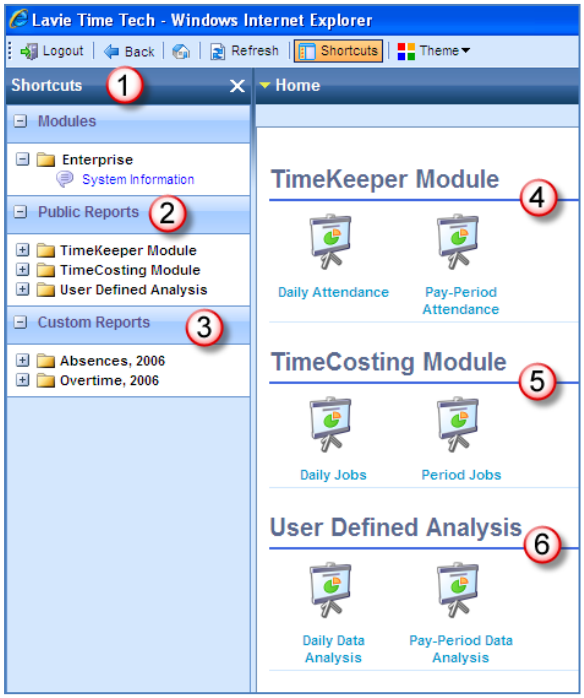
Each of these levels offers a variety of sub-screens, each with a different focus of your organization, such as *Period Comparison*, and *My Top/Worst Performers*.

Most screens require selecting *dimensions*, which are the organizational unit/s you are analyzing (plant, site, department, employee), the period of time you are analyzing (the selections differ depending on daily or period), and the task and then the metrics/criteria for analysis, whose results you want to display. These criteria are referred to in the system as *measures* or *Key Performance Indicators*, and can be attendance, absence, overtime, total number of tasks towards a specific work goal, etc. Since these are displayed in hierarchical form, all selections are carried out with drill down functionality, meaning you can search all selections from the more general until you arrive at a more detailed and less-specific selection; in other words, from a "parent" to a "child".

All dimensions and measures selections – in addition to selecting organizational units and time period of investigation – are performed via intuitive, feature-abundant and industry-standard *dimension selection* screens. All output graphs and charts are called *reports*. These reports are generated instantaneously and (in the TimeKeeping module) can be saved for further viewing and modification. All screens in TimeKeeper Analytics contain at least one additional informative graph. In most screens, the selections made in the top part of the screen affect the data in all graphs displayed on the same screen.

All results are available for filtering; you can re-generate the results by selecting different dimensions, or add additional dimensions to your selections. In certain screens, filtering is possible by directly clicking the bars and columns found in the graphs. If you want, you can change the graph and chart types, for example, from a bar graph to a line graph or from a pie chart to a pyramid chart.

Main Screen



	Name	Description
1	**Shortcuts**	The **Shortcut** pane enables you to quickly view system information and navigate between modules. To close the **Shortcut** pane, click .
2	**Public Reports**	Provides quick access and navigation between the different modules. Alternatively, for quick navigation purposes, use the **Home** pane.
3	**Custom Reports**	Enables you to save, organize, and view reports (screens with generated graphs/charts). **NOTE**: The Custom Reports shown here is for illustrative purposes only – in order for the heading to be shown, you must firs define reports in the system.
4	**TimeKeeper Module**	Analyzes and displays time and attendance data accumulated via TimeKeeper. Analyze by daily records (**Daily Attendance**) or pay period (**Pay-Period Attendance**, i.e. based on the pay-periods that are set in TimeKeeper. This can be either *weekly*, *bi-weekly*, *semi-monthly* or *monthly*).
5	**TimeCosting Module**	Analyzes and displays job allocation and labor distribution data accumulated via TimeCosting. Analyze by daily records (**Daily Jobs**) or pay period (**Period Jobs**, i.e. based on the pay-periods that are set in TimeKeeper. This can be either *weekly*, *bi-weekly*, *semi-monthly* or *monthly*).
6	**User-Defined Analysis**	Enables you to create custom reports for daily data and pay period cycles for the attendance and job allocation/labor distribution level by selecting the desired data and charts and inserting them into the report, according to your desired structure/layout. Analyze by daily records (**Daily Data Analysis**) or pay period (**Pay-Period Analysis**, i.e. based on the pay-periods that are set in TimeKeeper. This can be either *weekly*, *bi-weekly*, *semi-monthly* or *monthly*).

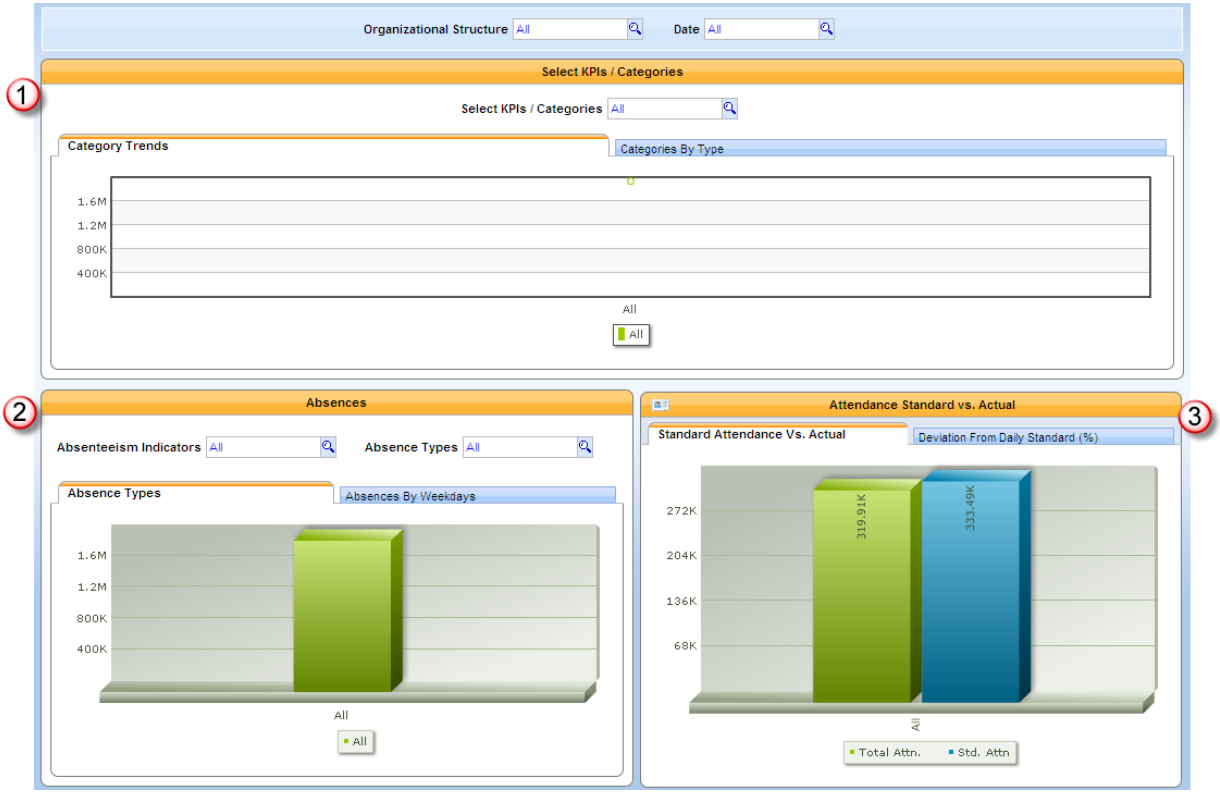
Toolbar Options

Button	Name	Description
	**Save**	If screen/settings have already been saved as a report, this saves any additional changes
	**Save As**	Save any settings or generated graphs as a report (later accessible through the **Shortcut** pane)
	**Export**	Opens the **Print** dialog box, and enables printing the current screen. Additionally, enables you to export to an .HTML page
	**Undo**	Erases the last change done to the screen , thus reverting it to an older state
	**Redo**	Reverses the undo or advances the buffer to a more current state
	**Get Link**	Displays the URL of the current screen
	**Theme**	Changes the background color scheme for the screen
	**Refresh**	Update the screen with any newly entered data

Daily and Pay-Period Attendance

NOTE: The **TimeKeeper** and **TimeCosting Daily Attendance** and **Pay-Period Attendance** screens are similar in function, layout, and terminology. This document uses **Daily Attendance** as the primary example.

From the main screen, click the module you want to work with. The relevant screen appears. **NOTE: Daily Attendance**, **Pay-Period Attendance**, **Daily Jobs**, and **Period Jobs** all open by default to the **View of** sub-screen (differs per customer).



View of Screen (TimeKeeper)

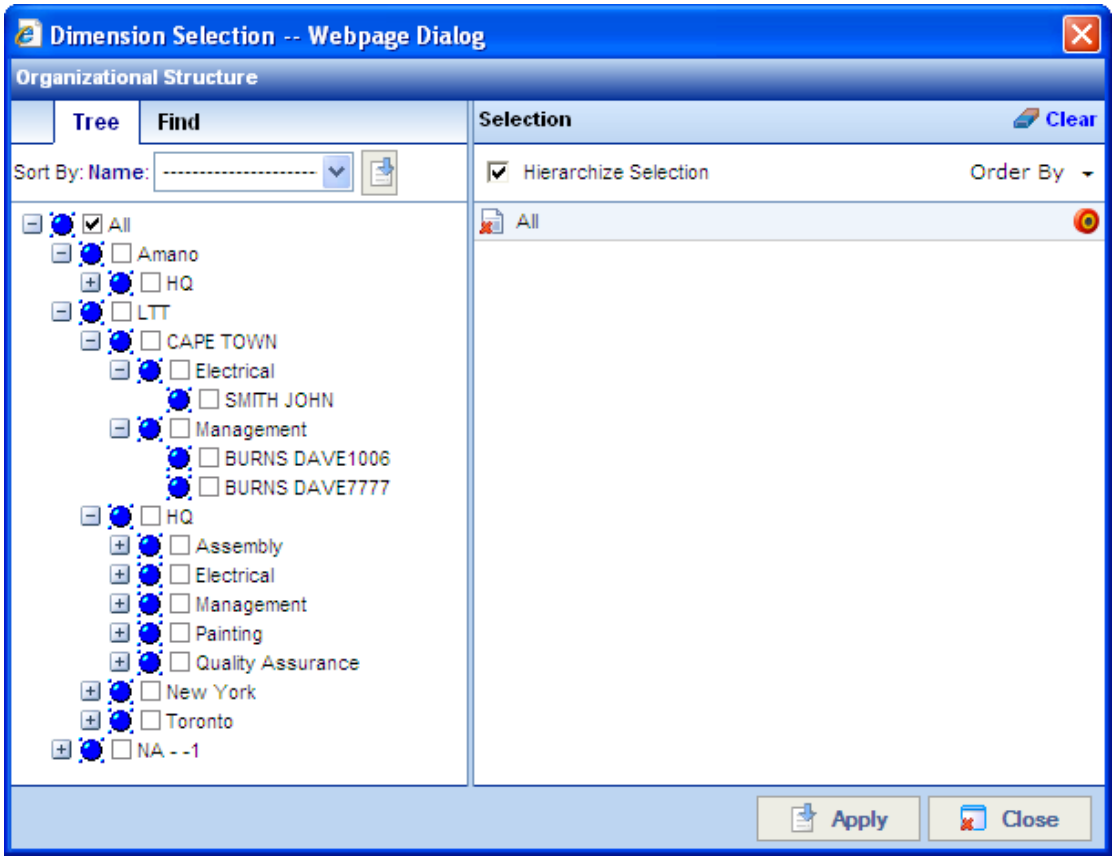
The **View of** screen (default) provides a general, "quick-glance" overview of your selected performance criteria (Key Performance Indicators, or KPIs) via clear, colorful graphs. These include:

	Description
1	Your selected corporate hierarchy's performance per selected KPIs, such as absence, attendance, expenses, etc. They can be filtered by date. You can view your entire organization's records or only a sub-entry component, such as department or employee. This data is shown concurrently as a line graph and as a bar graph.
2	Your selected corporate hierarchy's absence records, filtered by absenteeism indicators (paid absences, unpaid, etc) and absence type (sickness, etc). Absence data is also displayed by weekdays.

3	The actual attendance versus the standard (company-required) attendance, and the deviation from that standard.

To generate your desired **View of** graphs, do as follows:

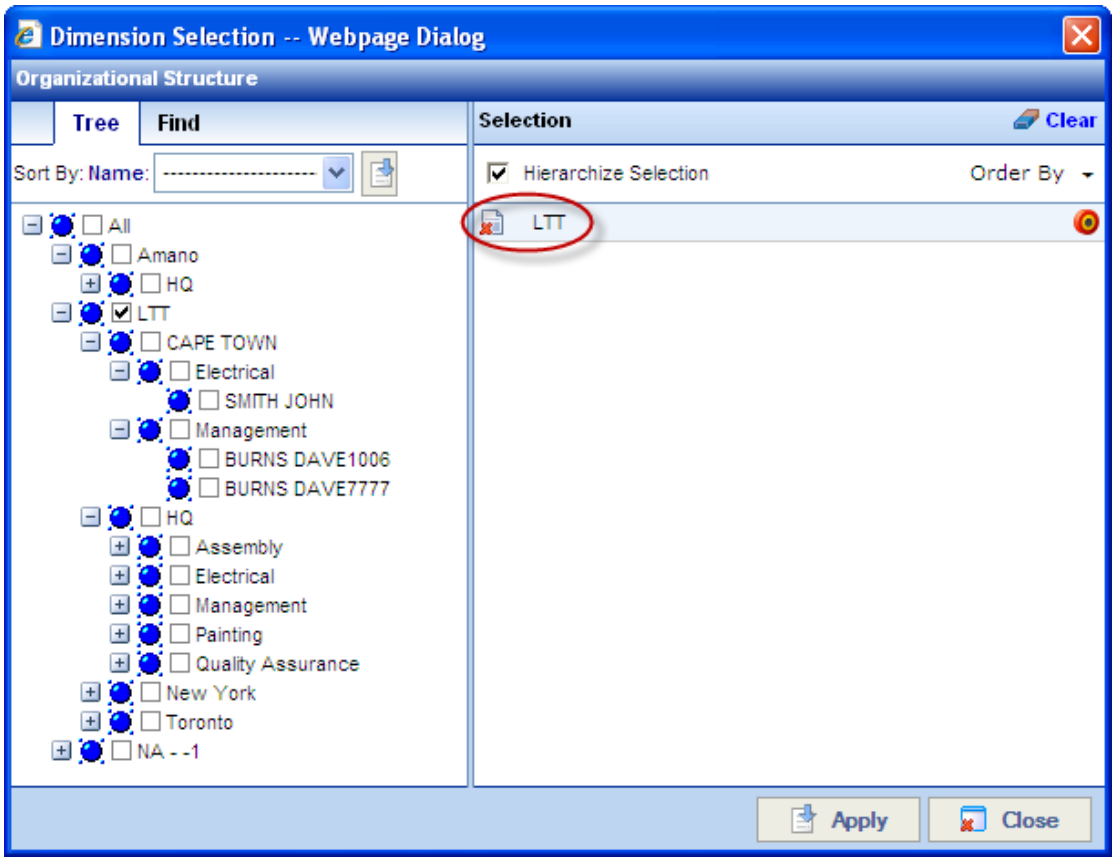
1. Click the **View o**f tab. The **View of** screen appears.
2. Select an organizational unit by doing as follows:
   a. In **Organizational Hierarchy**, click the **Find** button. The **Dimensions Selection** screen appears.
   b. In the left pane, click **ALL**, or drill down further (to site, department, or employee) by clicking the plus sign to expand the hierarchy.



   c. Select the organizational unit whose performance you want to measure.

   NOTE: The **All** selection refers to all defined organizational units. If you are not selecting this option, ***ensure that you clear its check box***.

   After selection, the organizational unit's name will appear in the **Selection** pane on the right.

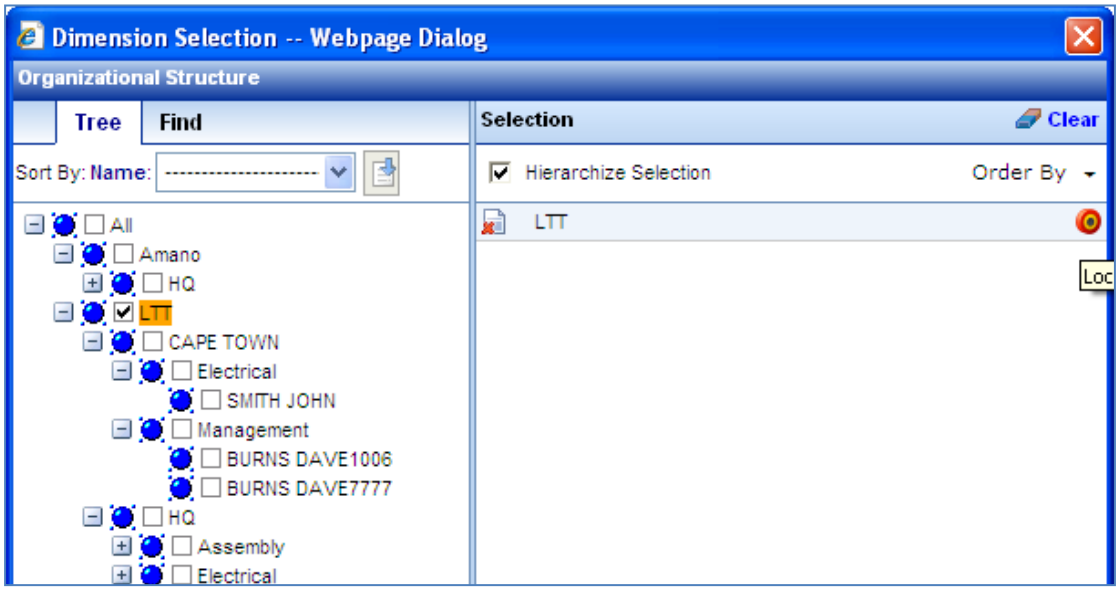


d. To clear any unnecessary selections from the **Selection** pane, click the **Clear** button on that selection's row.

e. For a hard-to-find name, click **Find** at the top, use the advanced search functions, and then click the button.

f. To clear all selections from the **Selection** pane, click the **Clear** button.

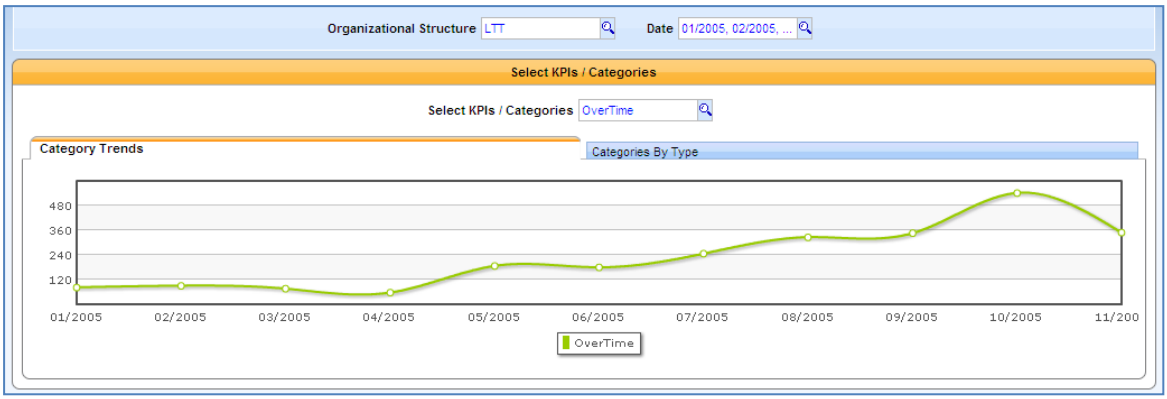
g. To locate a selected unit's original placement in the hierarchy, in the **Selection** pane, click the **Locate** button, and the placement in the hierarchy is highlighted.



h. Click **Apply** when done. To exit without saving, click **Close**.

NOTE: Do not make any "double selections" by selecting an entry in the hierarchy and a sub-entry of that unit. ***This will distort the results***.

3. Click **Date**. The **Dimensions Selection** screen for the **Dates Hierarchy** appears.
   a. Select the period. The main selections are arranged per year. Drill down for quarterly, monthly, and daily entries if needed.
   b. Click **Apply** when done.
4. Click **Pay Categories** and find the desired KPI.
   a. Drill down for specific KPI sub-entries if needed.
   b. Click **Apply** when done.
   c. In the following example, the top graph displays how many hours of overtime the employees in the LTT organization worked per month in 2005.

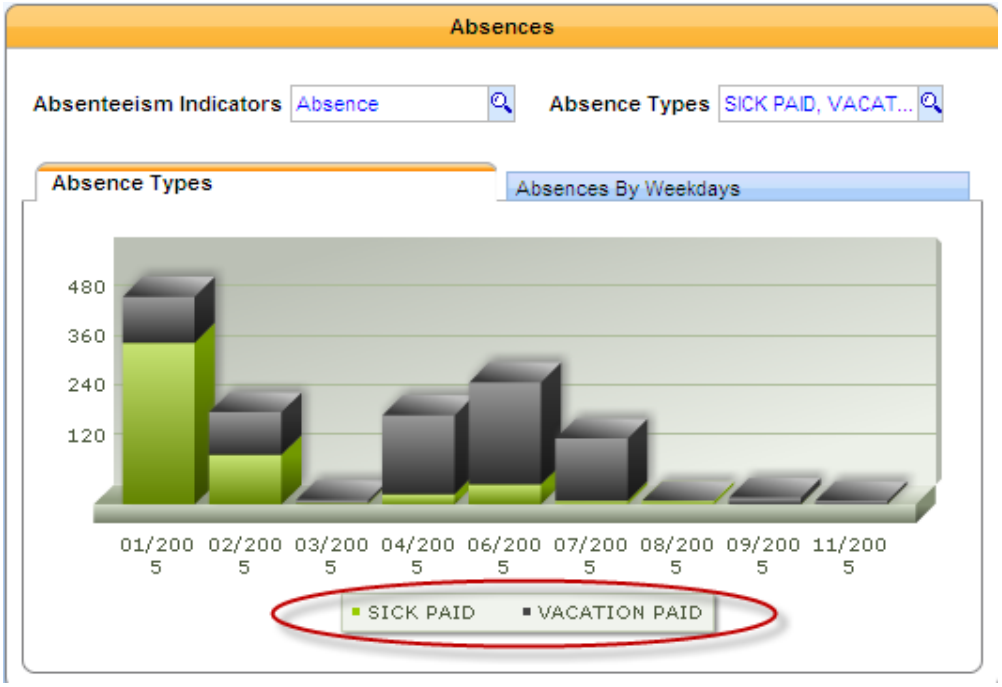


   d. Optionally, do the following:
      - Place your cursor over any of the yearly points on the line for an informative tooltip.

- Click the adjacent **Categories by Type** tab to view the same results in column form (place your cursor directly on the column for the tooltip).

5. In the bottom left, in the **Absence** graph, click **Absenteeism Indicators**. The **Dimension Selection** screen appears.
6. Select an **Absenteeism Indicator** and click **Apply**.
7. In the adjacent tab, click **Absence Types**. The **Dimension Selection** screen appears.
8. Select an **Absence Type** and click **Apply**.

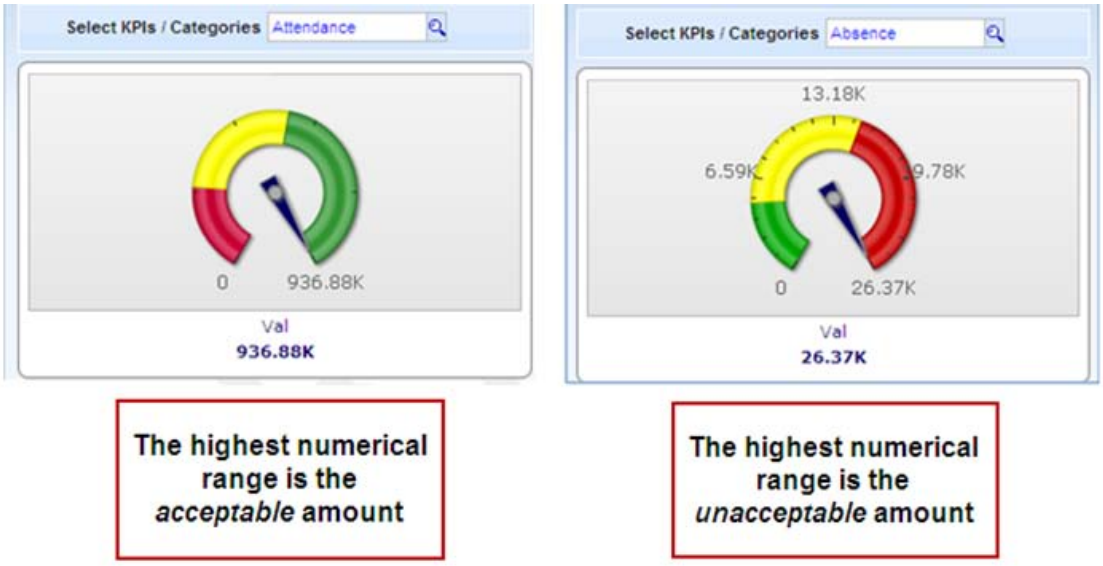
NOTE: The **Absences by Weekdays** tab appears only in **Daily Attendance**.



9. In the **Attendance Standard vs. Actual graph** on the bottom right, the default selected tab, **Deviation from Daily Standard (%),** displays the deviation from the daily standard (the required attendance, in percentage) per period selected.
10. Click the adjacent **Standard Attendance vs. Actual** tab to view a graph displaying standard attendance per year to actual (total) attendance per year.
11. Click any of the other tabs to continue your analysis.
12. To return to the main screen, from the main toolbar, click **Home** .

Monitor KPIs

Key Performance Indicators (KPIs) are the metrics that you use to evaluate how successful your organization is and determine the progress made towards your organizational goals. The **Monitor KPIs** screen enables you to view at a glance up to three selected KPIs per period and organizational hierarchy in standard "dashboard" format. Each KPI is analyzed by three numeric ranges of acceptability – colorfully displayed by default as red (unacceptable), yellow (borderline), and green (acceptable), although you can define different colors per range. Within each numeric range, you define the maximum threshold. You can re-arrange the color codes to suit your analysis; that is, on some dashboards a very low number can be acceptable (such as overtime or absences), resulting in a green (acceptable) yellow (borderline) red (unacceptable) configuration. On other dashboards, a high number can be the acceptable, such as attendance, resulting in a red (unacceptable) yellow (borderline) green (acceptable) configuration:

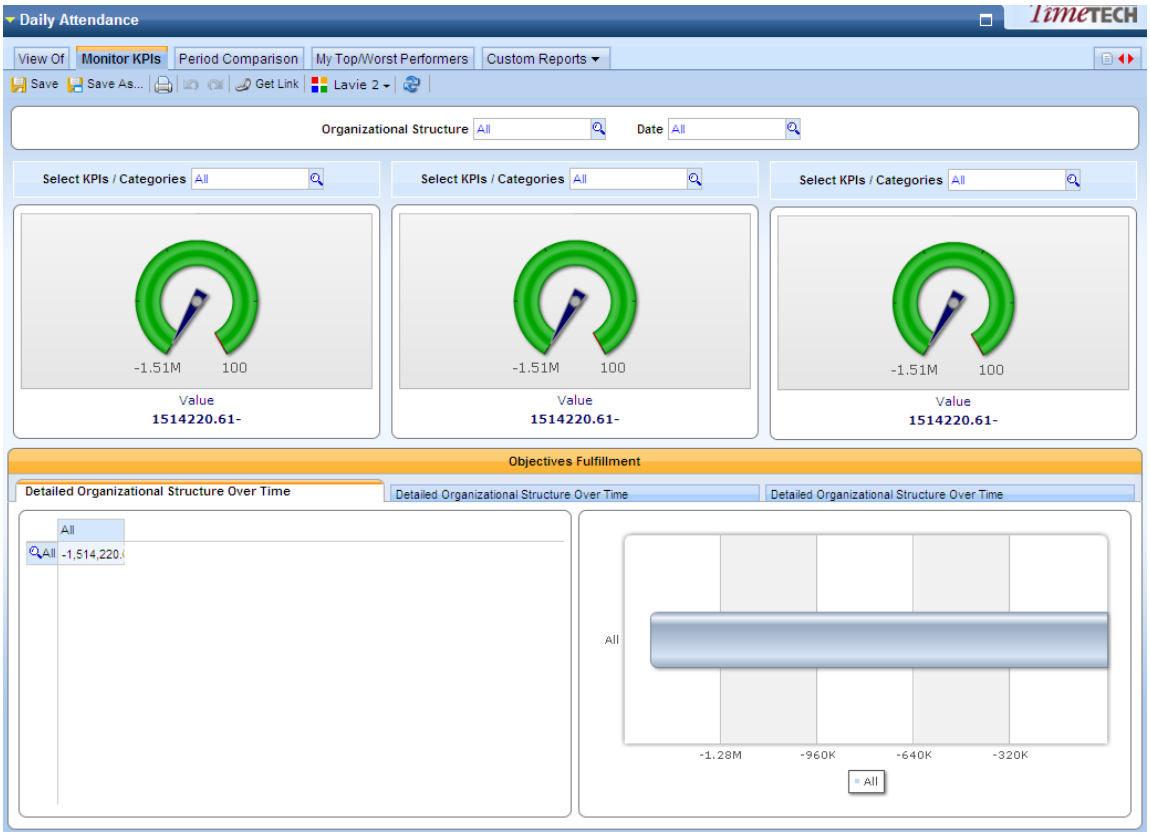


Each individual dashboard is accompanied for further analysis by two additional charts, both containing complete drill down functionality:

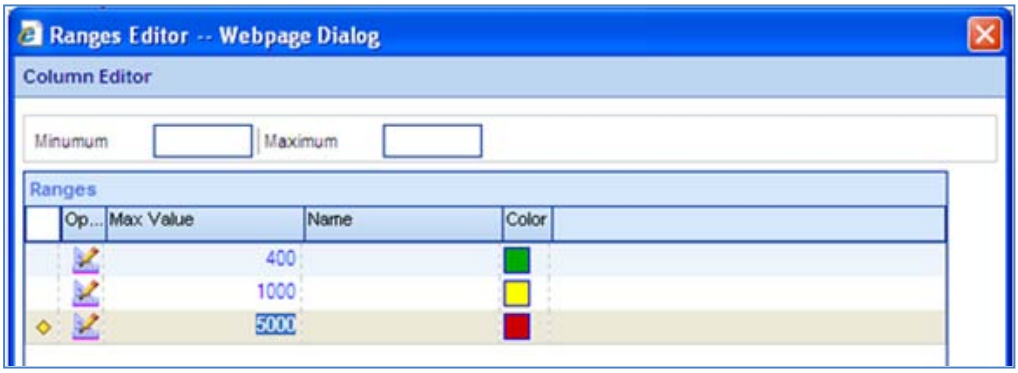
- A numeric chart displaying an analysis of the KPI per organizational unit and period
- A graphic column representation of that numeric chart

To work with the **Monitor KPIs**, do as follows:

1. Click the **Monitor KPIs** tab. The **Monitor KPIs** screen appears, configured to the default settings:



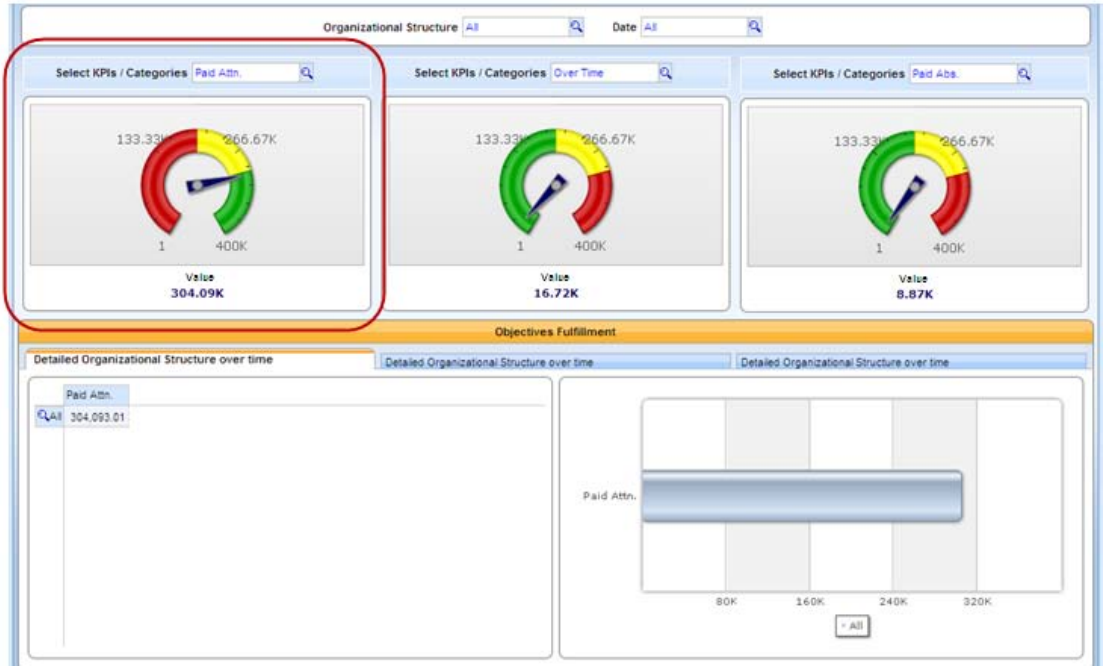
2. In **Organizational Hierarchy**, select the organizational unit that you want to analyze.
   NOTE: Initial selections may already impact the remaining KPI dashboard settings.
3. In **Date**, select the period you want to analyze.
4. In the dashboard on the far left, in **Select KPIs/Categories**, click the **Find** button. The **Dimension Selection** screen appears.
   a. Select the criteria you want to display. If necessary, drill down by expanding the hierarchy.
   b. Click **Apply**. The dashboard should be populated with values although no ranges have yet been set. The value at the bottom displays the total amount of that KPI according to the period and organizational unit you selected.
5. Click once on the dashboard. The **Ranges Editor** screen appears.



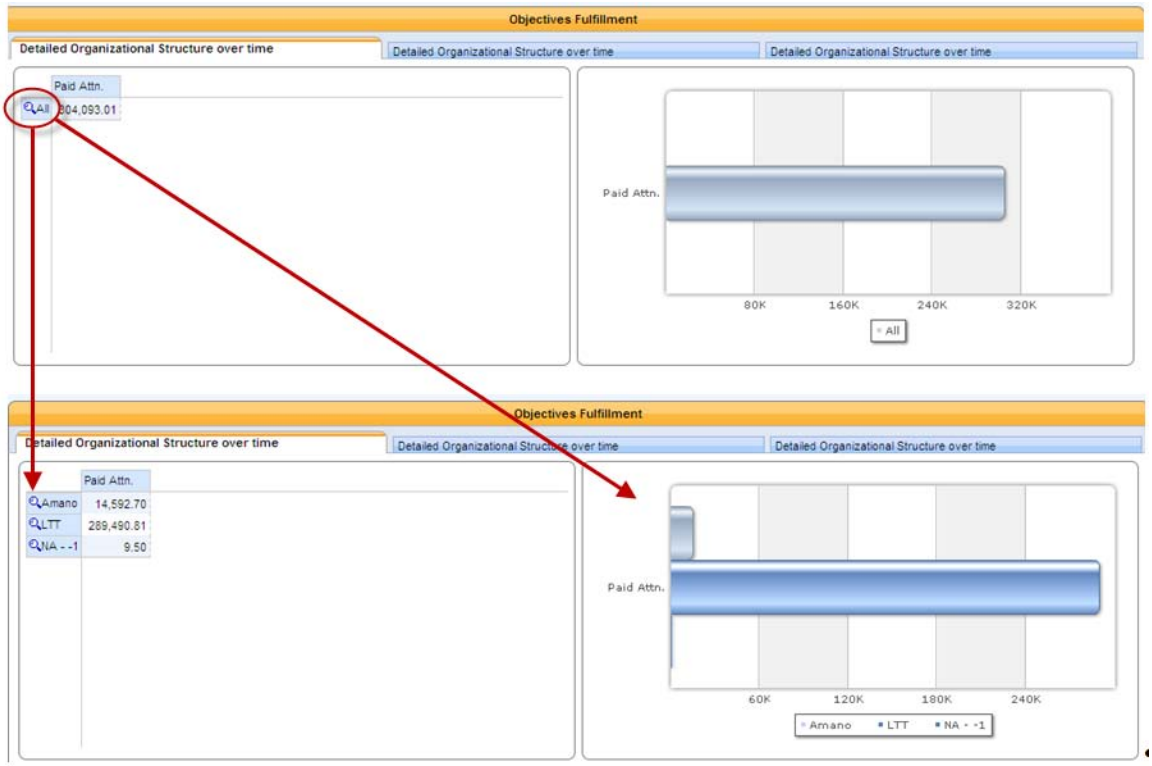
6. In the **Minimum** and **Maximum** entry boxes at the top, set the overall range of values.

   NOTE: It is recommended to enter a maximum value slightly larger than the actual value that you are analyzing.

   a. In the green row, in **Max Value**, place your cursor, and enter the value.
   b. Optionally, in **Name**, enter a brief description or name of this range.
   c. To change from green to a different color, click the green square, and select the desired color.
   d. Repeat for the yellow and red ranges, if needed.
   e. Click **Options**  in any row to re-structure the color ranges if needed. The diamond icon  displays the row currently selected for modification. The options are **Move Up**, **Move Down**, **Move First**, and **Move Last**.
   f. Click **Save** when done. The following example displays total attendance (note the reversal of colors):



7. In the **Objectives Fulfillment** area at the bottom of the screen, ensure that the **Detailed Organizational Structure over time** tab directly under the KPI dashboard is selected.
8. To drill down per organizational unit, click the **All** column on the bottom far left. Note that this impacts both the chart and the graph on the right (alternatively, place your cursor on the column in the bar graph and click once).



The graph will display the KPI per organizational structure over the selected time period.

9. Click the columns in the bar graph or the columns on the far left to drill down further if needed.
10. Optionally, repeat for the remaining KPI dashboards.
11. Click any of the other tabs to continue your analysis.
12. To return to the main screen, from the main toolbar, click **Home** .

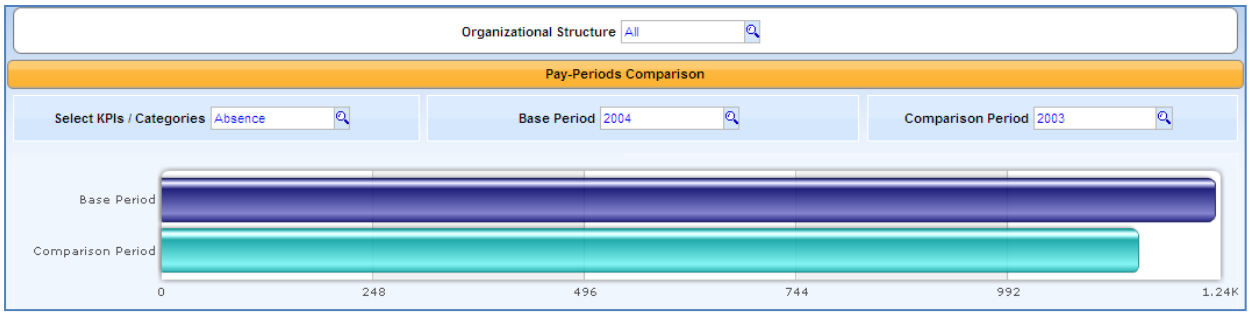
Period Comparison

This screen enables you to compare selected criteria of two separate periods of an organizational hierarchy. Use **Period Comparison** to compare total attendance in two separate years for the entire organization, lateness in two consecutive quarters for a specific department, absences in two months for a specific employee, etc.

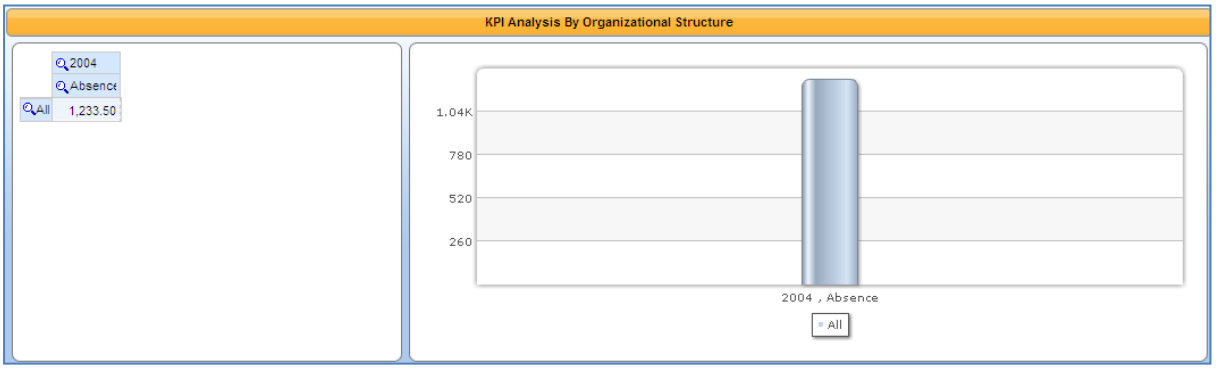
To use the **Period Comparison** screen, do as follows:

1. Click the **Period Comparison** tab. The **Period Comparison** screen appears.
2. In **Organizational Structure**, click the **Find** button. The **Dimension Selection** screen appears.
    a. Select the organizational unit/s you want to display. Expand the hierarchy to drill down, if necessary.
    b. Click **Apply** when done.
3. In the **Pay Periods Comparison** area, in **Select KPIs/Categories**, click the **Find** button. The **Dimension Selection** screen appears.
    a. Select the criteria for display. Expand the hierarchy to drill down, if necessary.
    b. Click **Apply** when done.
4. In **Base Period** and **Comparison Period**, click the **Find** button. The **Dimension Selection** screen appears.
    a. In **Base Period**, select the *main period* - the period you are analyzing and want to drill down from later - and in **Comparison Period**, select a comparison period to display. Expand the hierarchy to drill down, if necessary.
    b. Click **Apply** when done.

    Defining the dates generates the comparison graph, accompanied by a value representing the difference between the two selected periods:



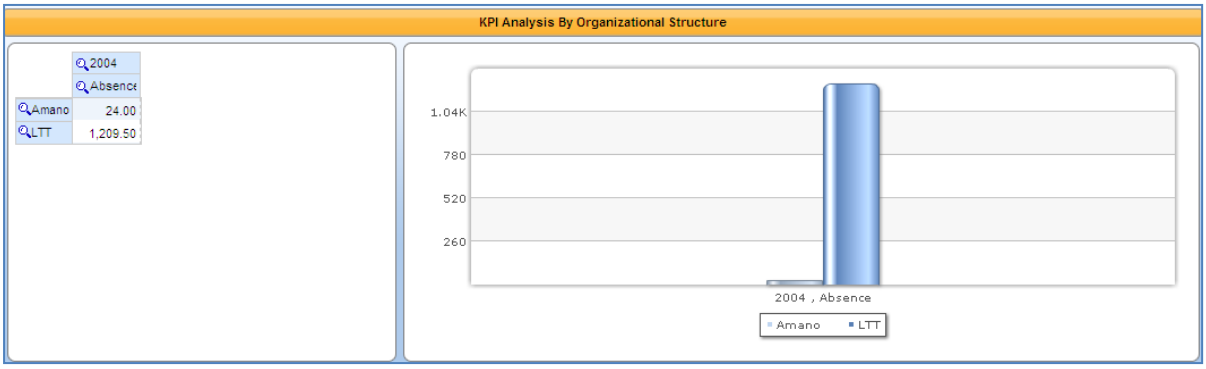
The **KPI Analysis by Organizational Structure** area at the bottom of the screen displays the following:



- On the **left** side, the graph displays the KPI/s of the main period in numeric form
- On the **right** side, the graph displays KPI/s of the main period in graphic form

Continue to the following procedures:

5. To drill down, click any of the icons on the bottom left to select a KPI (alternatively, click the columns on the far right). For example, click **ALL** on the far left to display an analysis by organizational unit. Note that this process also impacts the bar graph:



My Top/Worst Performers

This screen enables you to display the employees with the highest or lowest performance in selected criteria, via actual placement order or percentile from the highest or the lowest (for example, the bottom ten or top five).

To use the **My Top/Worst Performers** screen, do as follows:

1. Click the **My Top/Worst Performers** tab. The **My Top/Worst Performers** screen appears
2. In the entry box in the top middle, select the mode by which to analyze the organizational units:
   - **Top Count** – displays the number of employees with the highest performance in a selected criteria
   - **Bottom Count** – displays the number of employees with the lowest performance in a selected criteria
   - **Top Percent** – displays the employees in the highest percentile in a selected criteria
   - **Bottom Percent** - displays the number of employees in the lowest percentile in a selected criteria
3. Enter the number of the top or bottom count or the percentile group. For example, entering "**10**" together with "**Top Percent**" results in all the units in the top ten percent.
4. In **Select KPIs/Categories,** click the  icon. The **Dimensions Selection** screen appears.
5. In the **Tree** pane on the left, select the criteria by which you want to analyze the organizational unit. Expand any of the options to drill down if necessary.
6. In **Absence Types**, click the **Find**  icon *only* if you have selected attendance in **Select KPIs/Categories**. From the **Dimensions Selection** screen, select an absence reason. (If you have not selected attendance in **Select KPIs/Categories**, leave the selection at **ALL**.)
7. In **Base Period**, click the **Find**  icon. The **Dimensions Selection** screen appears.
8. In the **Tree** pane on the left, expand **All** to select the year. If necessary, drill down for quarterly, monthly, or daily analysis.
9. Click **Apply** to generate the report. To change any values in the entry boxes, modify as needed, and click the **Go** button 

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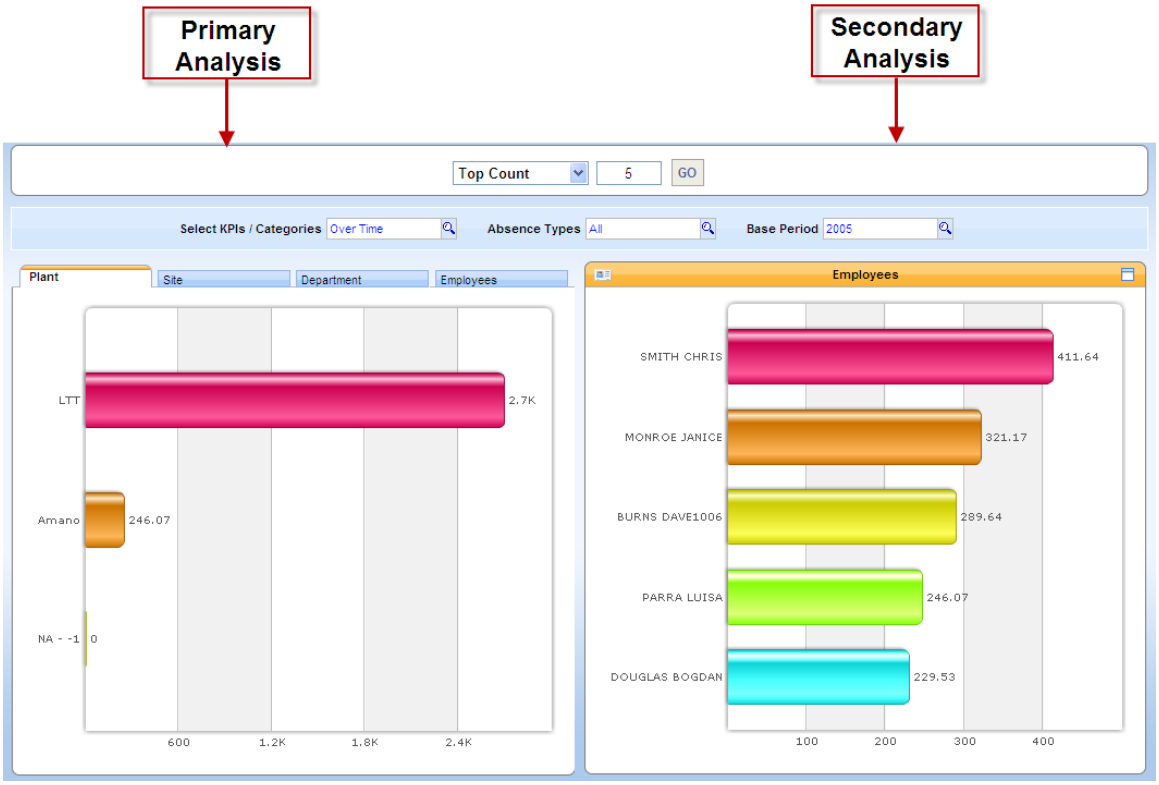
   This example displays the top five overtime performers for 2005. The generated report displays two analyses:

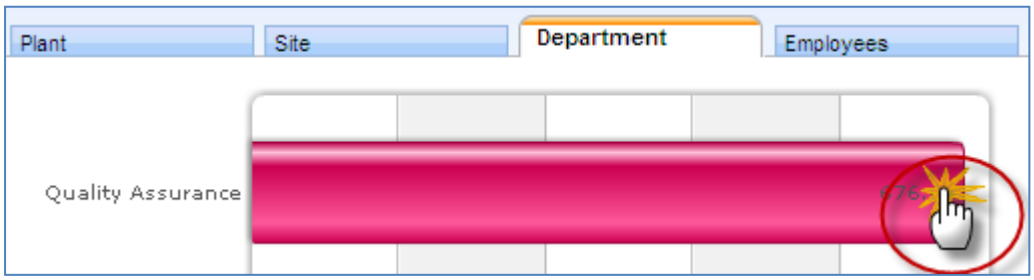
   - The *primary* analysis, on the left, displays the top five overtime performers by corporate hierarchy (i.e. *Plant*, *Site* or *Department*) for 2005

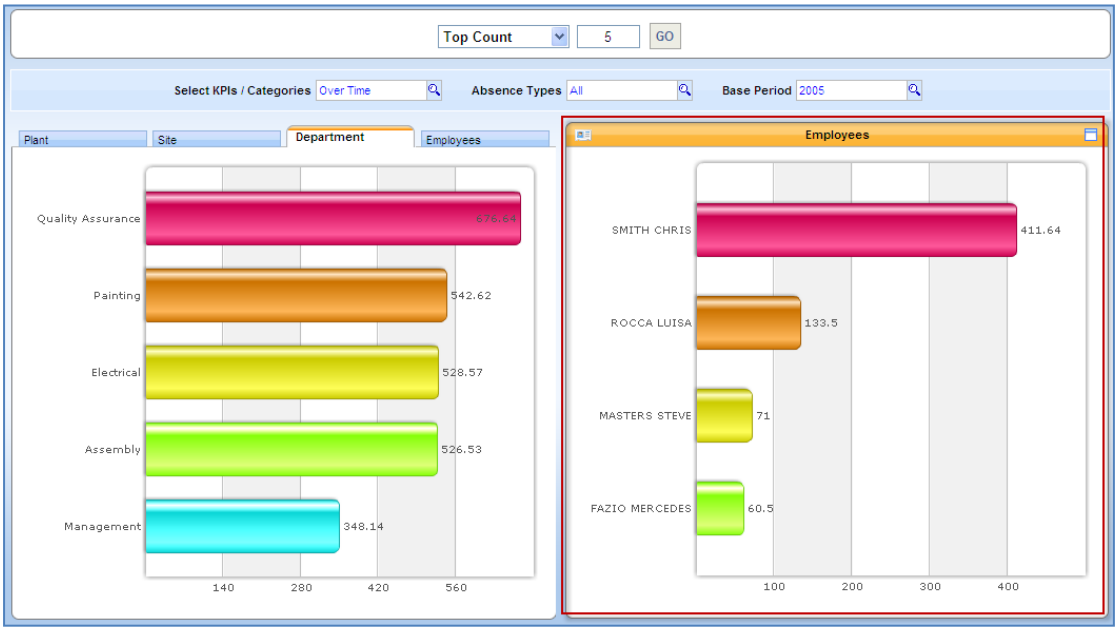
- The *secondary* analysis, on the right, relates to the single top organizational performer from the primary analysis display. It displays the top five employees with the most overtime in that organization.



Optionally, do any of the following:

- Click the tabs in the bottom left graph to view the results by **site**, **department**, and **employee**.
- **Note that after selecting the additional tabs, the *Employees* graph does not change**. This is because the **Employees** graph is updated only by drilling down from one of the columns in the primary analysis. For example, in the **Department** tab, to view a list of the top five employees with the overtime hours in a certain department, click any department (in this example, **Quality Assurance**). Note the update in the secondary analysis:





- For additional options, click the icon, and do any of the following:
  - To refresh the contents of the screen, click **Refresh**.
  - To change the chart's structure and appearance (but not the information) click **Chart Type**.
  - To select additional chart options, click **Chart Options**.
  - To shift the axes and aggregate the data, click **Pivot**.
  - To transfer to a pivot table format, click **Zoom to Report**.
  - To print or export to an .HTML page, click **Print**.
- To expand the graph to full-screen size, click .
- From the **View of** screen tabs, click any of the other tabs to continue your analysis.
- To return to the main screen, from the main toolbar, click **Home** .

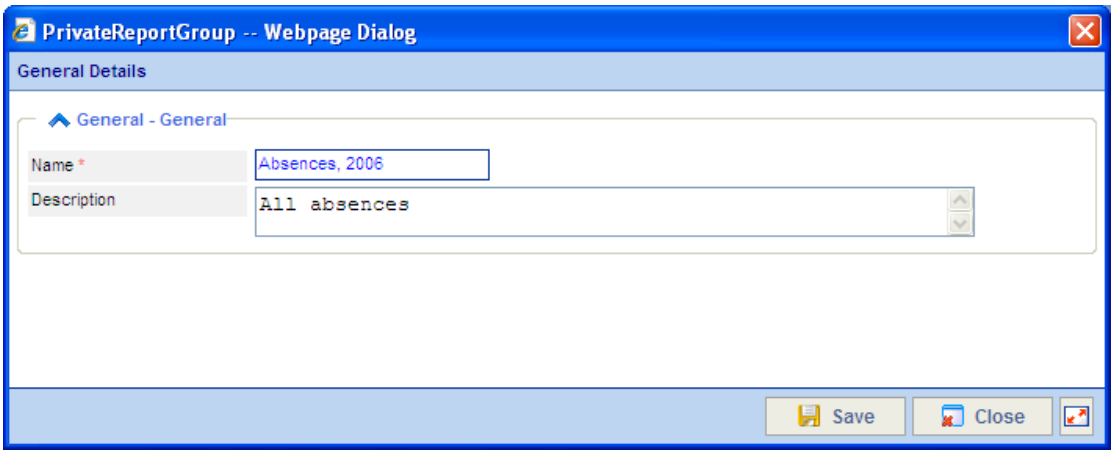
Custom Reports

All generated data and graphs can be saved per screen as a *Custom Report* for later viewing and additional modification. You can create a collection of related reports - a *Report Group* - and later assign each report to a group.

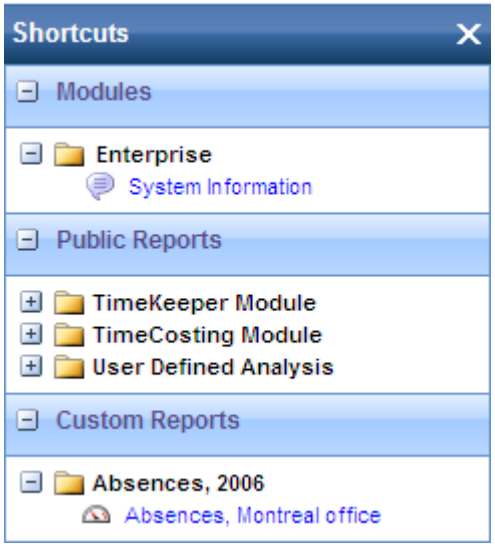
Saving Reports

This example demonstrates how to save a report of top attendance employees.

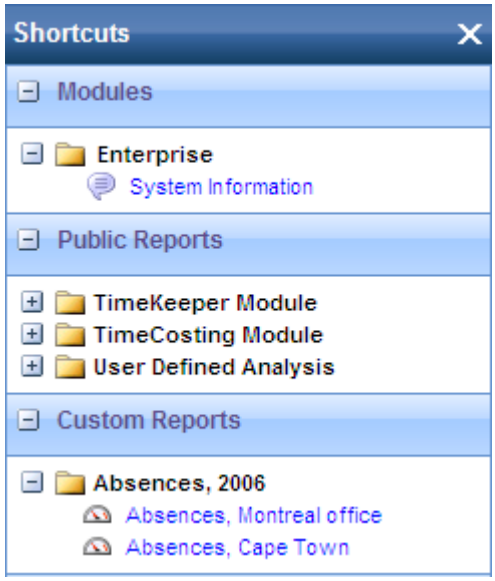
1. From the toolbar, click **Save As**  . The **Save Report** screen appears.
2. Click **New Folder**. The **Private Report Group** screen appears.
3. Enter a name and a brief description of your report group.



4. Click **Save**.
5. A confirmation message appears. Click **OK**. The Report Group is displayed in the **Save Report** screen.
6. In **Save Report** screen, in the **Report Name** field, enter a name for the specific report/settings/screen results you want to save.
7. Click **Save**. The new Report Group folder (**Best Performers**) and individual report appear in the **Custom Report** area in the **Shortcut** pane. Individual reports are designated by the  symbol.



1. To add another report to this group, do as follows:
   - If there is only **one defined report group**, click **Save As**, enter the report's name, and click **Save**. By default, the report is saved in that group, and will appear as a sub-entry in the Shortcut pane.



   - If there are **multiple defined report group**s, click **Save As**, highlight the desired report group, enter the report's name, and click **Save**. The report is saved in that group, and will appear as a sub-entry in the **Shortcut** pane.

Viewing Saved Reports

1. From the **Shortcut** pane, in **Custom Reports**, expand the plus sign in the folder where your report is found, and click the desired report. The report will open in the **Home** pane.
2. To **modify the report**, simply make any necessary changes, re-generate the reports, and click **Save**.

3. To **delete a report group**:
    a. Find the desired report in that report group.
    b. Click **Save As**. The **Save Report** screen appears.
    c. Highlight the desired report group and click **Delete**.
    d. Click **OK** to confirm, and then in the **Save Report** screen, click **Save**.
4. To **delete a report from a report group**:
    a. Find the desired report in that report group.
    b. Click **Save As**. The **Save Report** screen appears.
    c. Highlight the desired report group and click **Delete**.
    d. Click **OK** to confirm, and then in the **Save Report** screen, click **Save**.

Daily and Pay-Period Jobs

Overview

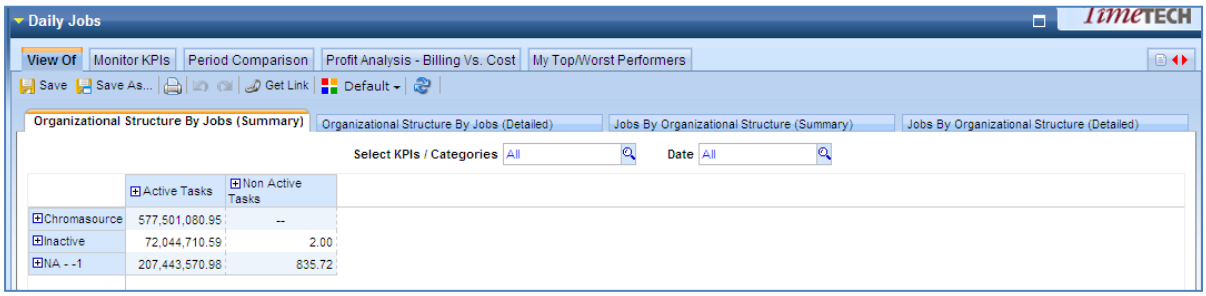
The TimeCosting Module screens – **Daily Jobs** and **Pay-Period Jobs** - are similar to the TimeKeeper module screens in layout, functionality, and interface terminology, with the main difference being the emphasis on labor distribution and task allocation instead of attendance-related issues. This section focuses on screens that contain significant differences as compared to the TimeKeeper modules.

View of

The **View of** screen (default) in the TimeCosting module is comprised of four subscreens and displays a general, initial, "quick-glance" numeric overview of your active and non-active tasks, in a stripped-down chart form for easy visual chunking. You can filter by date and organizational unit. Key Performance Indicators (KPIs) are:

- Cost
- Duration
- Rates
- Quantities
- Pay Categories

Each of these KPIs contains further drill down options.



See the following page for an explanation.

Organizational Structure by Jobs (Summary)	This screen displays all tasks per organizational unit in order to provide the manager/supervisor a quick-overview, at a glance, of all the jobs/tasks performed by his/her team. You can filter by KPI or date.
Organizational Structure by Jobs (Detailed)	This screen expands on the previous screen by providing a reverse approach in a greater detail. It displays all tasks per organizational unit so you can see how many hours are contributed by each corporate unit to a specific job or group of jobs. You only need to filter by date.
Jobs by Organizational Structure (Summary)	Both this screen and the following screen are actually the reverse of the first two screens. It displays all organizational units per active and non-active tasks. You can filter by KPI or date.
Jobs by Organizational Structure (Detailed)	This screen expands on the previous screen by providing a more detail-based approach. It displays all organizational units per active and non-active tasks - together with all KPIs and drill down options - therefore eliminating the need to open the **Dimensions selection** screen for KPI selection. You only need to filter by date.

Monitor KPIs

NOTE: This feature is enabled only for customers who utilize the planned hours and planned quantities feature.

The **Monitor KPIs** screen in the TimeCosting module enables you to view at a glance up to two KPIs per date and organizational hierarchy in dashboard format. These KPIs are:

- Actual vs. Planned Hours
- Actual vs. Planned Units

See Monitor KPIs for a detailed explanation. Note that unlike attendance KPIs, these KPIs are the default and cannot be changed.

Creating User-Defined Analysis Screens

Overview

The User-Defined Analysis screens enable you to create custom reports for daily periods and pay period report tables for the attendance and job allocation/labor distribution levels. These screens function as data summarization and analysis tools where you select not only the fields for screen display, but also the fields' location by simply dragging and dropping KPIs into the screen, and alternatively, removing them. Re-arrange the fields and headings to either shift the focus or create a different report entirely; the results are custom reports displayed "on the fly."

Using the User-Defined Analysis screens, you can do the following:

- Create "pivot table"-style reports utilizing easy drag-and-drop functionality
- View numeric-based charts or colorful graphs – you choose the display
- Save any reports for further reference
- Mark all exceptional values in a range of colors by utilizing Boolean logic techniques
- Export all reports to an .HTML page or an Excel spreadsheet

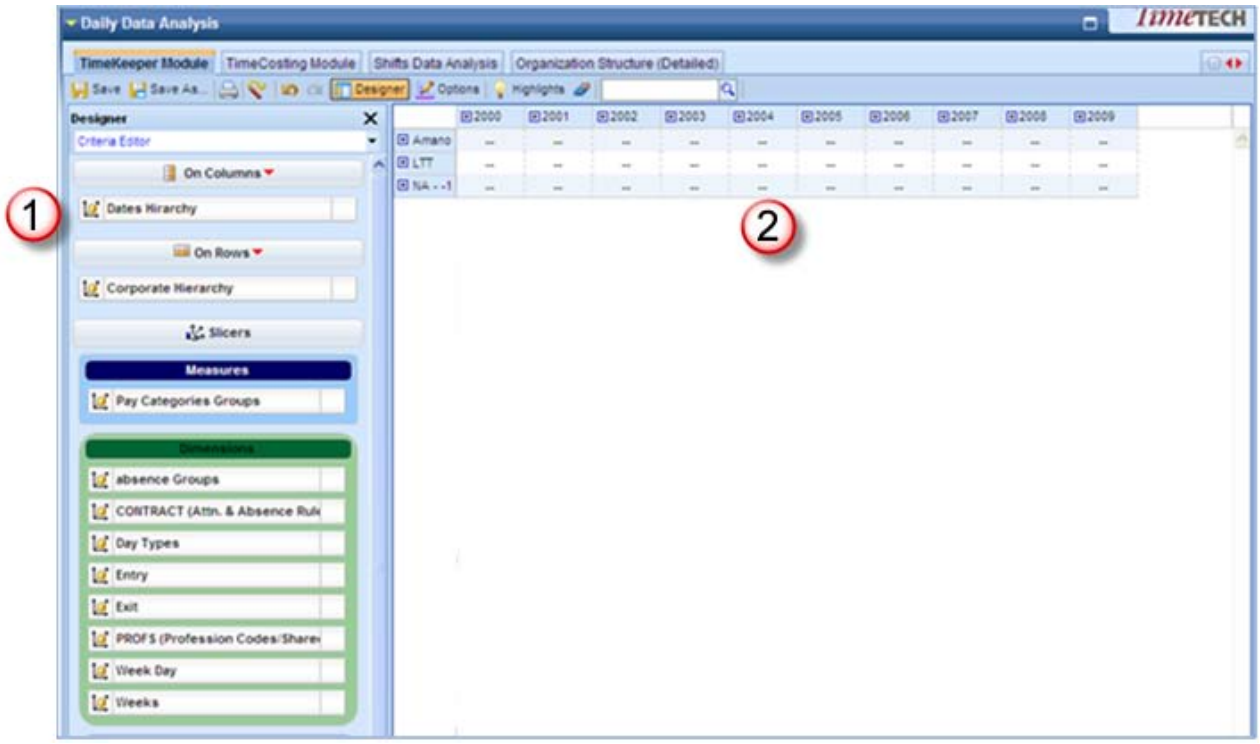
Main Interface

REMINDER: The default screens shown in this chapter are for illustrative purposes only and can differ per customer.

To work with the **Daily Data Analysis** or **Pay-Period Data Analysis** screens, do as follows:

1. Access the **Home** pane.
2. From the **User-Defined Analysis** area, click **Daily Data Analysis** or **Pay-Period Data Analysis**. The appropriate screen appears, set by default to the **TimeKeeper** Module.

The main grid displays only years and the organizational units.



1	**Designer Pane**
2	**Main Grid**

Main Toolbar

Button	Name	Description
	Save	If screen/settings have already been saved as a report, this saves any additional changes
	Save As	Enables you to save the current report and access it at a later time via a shortcut
	Export	Exports the current screen data to an .HTML file or an Excel spreadsheet
	Criteria Selection	Opens another (movable) instance of the **Designer** pane
	Undo	Erases the last change done to the screen , thus reverting it to an older state
	Redo	Reverses the undo or advances the buffer to a more current state
	Designer	Opens and closes the **Designer** pane. Alternatively, to close the **Designer** pane, click ☒ at the top right.

	**Options**	Enables you to re-arrange the axes of the current settings
	**Highlights**	Enables you to highlight any exceptional values via selected colors
	**Clear Highlights**	Removes any highlights you have defined
	**Find**	Enables you quickly to find a word or number in the grid

Designer Pane

Name	Description	
Criteria Editor		Enables you to view which filtering criteria from the **Designer** pane are currently used on the columns and rows in the grid
	On Columns	Enables you to view which filtering criteria from the **Designer** pane are currently used on the columns in the grid
	On Rows	Enables you to view which filtering criteria from the **Designer** pane are currently used on rows in the grid
Dates Hierarchy		Enables period selection for filtering purposes
Slicers		Displays all dimensions selected for the current report
Measures	**Select KPIs/Pay Categories**	The categories available for your analysis, such as overtime and attendance
Dimensions		Criteria used for filtering purposes
	Absence Groups	All the absence codes defined in your system, arranged by groups- sickness, reserve duty, vacation, etc.
	Contracts	All the agreements defined in the system
	Day Types	All defined days in the company's year – holidays, weekends, work days, etc.
	Entry	Entry times according to defined shifts
	Exit	Exit times according to defined shifts
	Profs	All defined professions in the system, according to tenure
	Week Day	All days of the week
	Weeks	All weeks of the year
Organizational Structure		How your corporate hierarchy is structured according to its levels
	Corporate Hierarchy	All currently active corporate hierarchies
	Corporate Hierarchy	All past (and non-active) corporate hierarchies

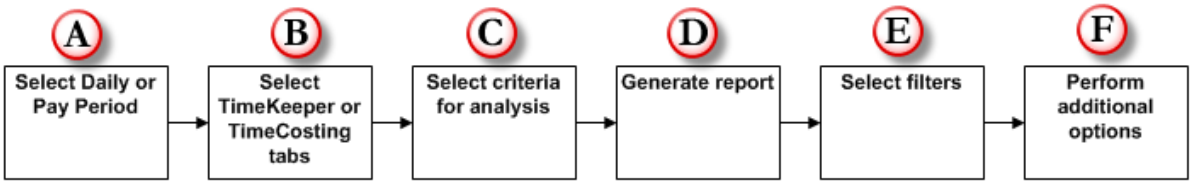
	(History)	
	Sites	All the sites defined in your system
	Plants	All the plants defined in your system
	Department	All the departments defined in your system
	Employees	All employees currently active in your system
	Employee History	All past (and non-active) employees
Sorts		**Sorts** is an extension to the Organizational Structure (see above). **Sorts** are customer defined and differ per company; these are additional fields that enable categorizing employees. Common sorts are *team*, *province*, *area* and other factors that enable you to aggregate data.

Daily and Pay-Period Data Analysis

The **Daily Data Analysis** screen enables you to create custom reports for daily periods for the attendance and job allocation/labor distribution levels.

NOTE: The **Daily Data Analysis** and **Pay-Period Data Analysis** screens are similar in function, layout, and terminology. This section uses **Daily Data Analysis** as the primary example. If you follow the instructions and become familiar with the standard usage, you should not have a problem in the remaining modules. Any differences between the modules will be emphasized.

The basic functionality is as follows:



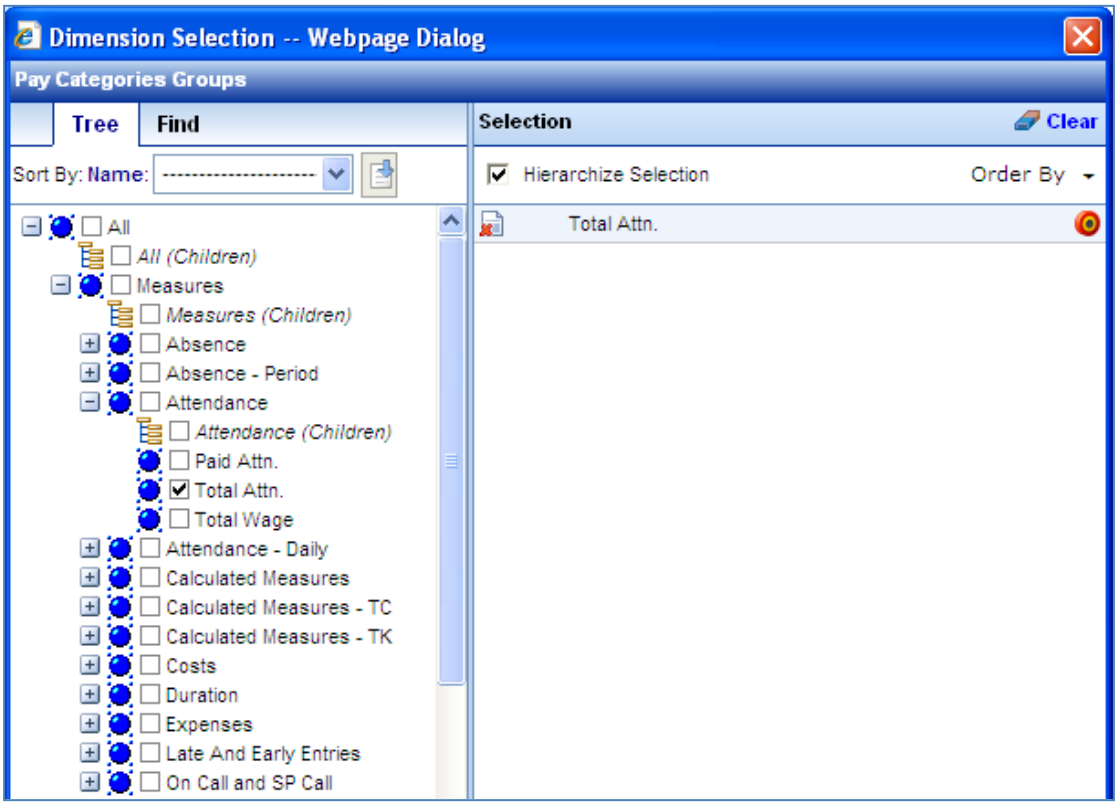
To work with the **Daily Data Analysis** screen do as follows:

1. Follow the instructions in Main Interface to access the **Daily Data Analysis** screen, , set by default to the **TimeKeeper Module**.

   The main grid displays years (columns) and the organizational units (rows).

   NOTE: The **Pay-Period Data Analysis** screens display period as *weekly*, *bi-weekly*, *monthly*, and *semi-monthly*.

2. From the **Measures** section in the **Designer** pane, click **Pay Categories Groups**. The **Dimension Selection** screen appears.
3. In the **Tree** pane, expand the **Measures** hierarchy, select how you want to analyze your corporate hierarchy:
   - *Measures* are standard for every corporate hierarchy
   - *Pay Categories* are flexible and differ per corporate hierarchy. The content in Pay Categories is customer-specific.
4. Click **Apply**.



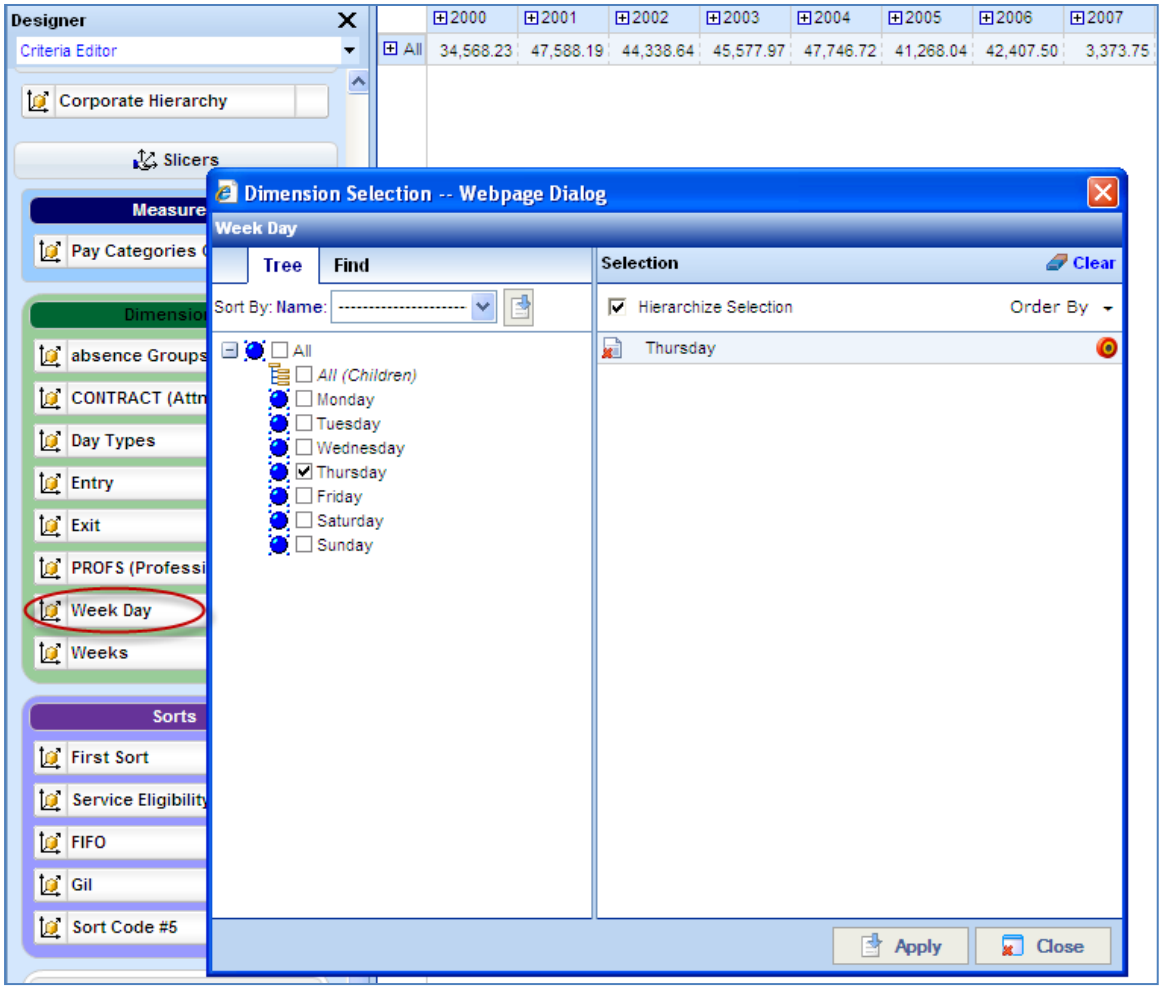
This example displays total attendance per year. The following should appear in the grid:

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Amano	2,163.49	2,116.00	1,955.00	2,058.48	1,921.16	1,715.36	1,896.25	146.25	0.00	620.71
LTT	32,404.74	45,472.19	42,383.64	43,519.49	45,825.56	39,552.68	40,511.25	3,217.50	1,415.71	10,979.45
NA - -1	--	--	--	--	--	--	--	10.00	0.00	--

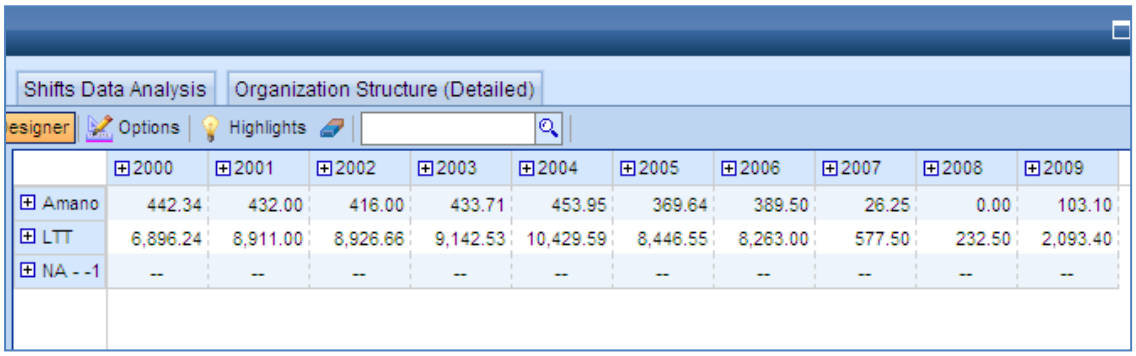
5. From the **Designer** pane, in the **Dimensions** section, use the filtering criteria to filter by these filters:
   - Contract (attendance and absence rules)
   - Week days
   - Day types
   - Absence groups
   - Weeks
   - Professions

- Exit and entry times

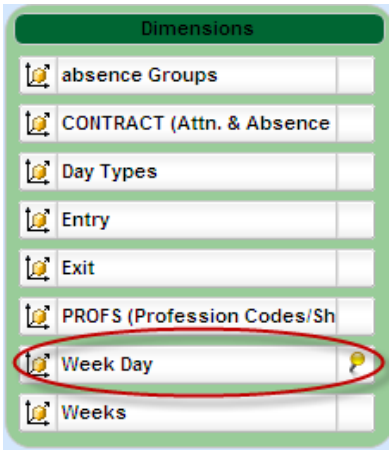
The following example filters the previous example - total attendance per year – by showing attendance on Thursdays only.



Note the change in the grid:



NOTE: After a dimension or any other criterion is selected from the **Designer** pane, a "thumbtack" icon  appears adjacent to that selection.

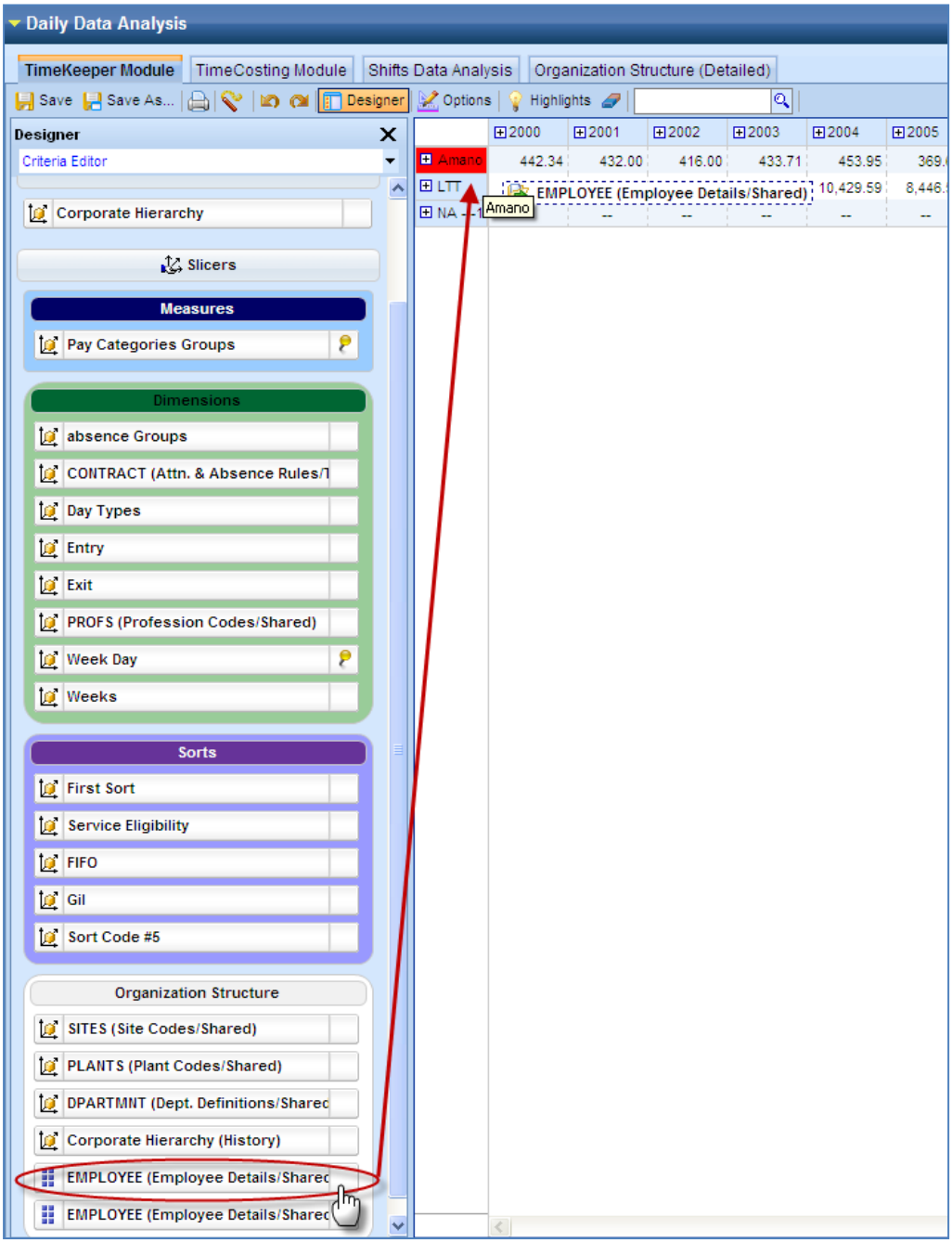


6. Drill down by expanding any of the plus signs in the grid, such as those representing the organizational units, or the dates.

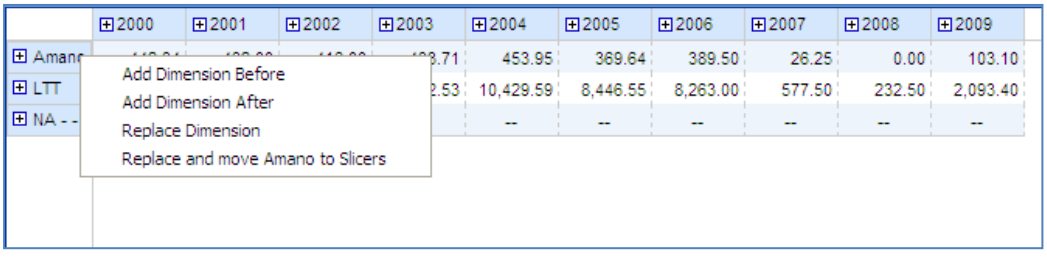
			2000	2001	2002	2003	2004	2005	2006	2007	2008
Amano	HQ	Electrical	442.34	432.00	416.00	433.71	453.95	369.64	389.50	26.25	0.00
LTT	CAPE TOWN		632.75	788.82	833.85	843.92	950.57	775.24	783.00	52.50	89.50
	HQ	Assembly	911.50	1,985.50	2,016.00	2,035.25	2,382.50	1,876.00	1,947.50	131.25	0.00
		Electrical	946.00	1,594.09	1,598.66	1,618.00	1,886.61	1,515.44	1,558.00	105.00	11.00
		Management	412.50	405.58	392.00	395.08	491.25	366.00	389.50	26.25	0.00
		Painting	1,650.45	1,577.07	1,669.25	1,637.97	1,908.74	1,577.54	1,405.00	105.00	54.00
		Quality Assurance	1,412.14	1,719.58	1,608.00	1,675.44	1,862.92	1,555.56	1,558.00	105.00	0.00
	New York		462.75	387.91	407.50	479.75	498.83	393.98	385.50	26.25	48.00
	Toronto		468.15	452.45	401.40	457.12	448.17	386.79	236.50	26.25	30.00
NA - -1			--	--	--	--	--	--	--	--	--

NOTE: To revert the report to the form displayed previously, you can collapse the minus signs in the grid, or use the **Undo** button to go back a step.

7. Whereas filtering streamlines and reduces the data displayed in the grid, you can *add* to the data by dragging additional filter criteria from the **Designer** pane. For example, to display attendance per individual employee, drag **Employee** from the bottom of the **Designer** pane to the desired location in the grid.



8. Release your finger and select an option from the pop-up menu.



Option	Explanation
Replace Dimension	Replaces the most recent dimension with the new.
Add Dimension Before	Places the new dimension before the currently-existing selection in the grid
Add Dimension After	Places the new dimension after the currently-existing selection in the grid
Replace and Move to Slicers	*(Same as Replace Dimension)*

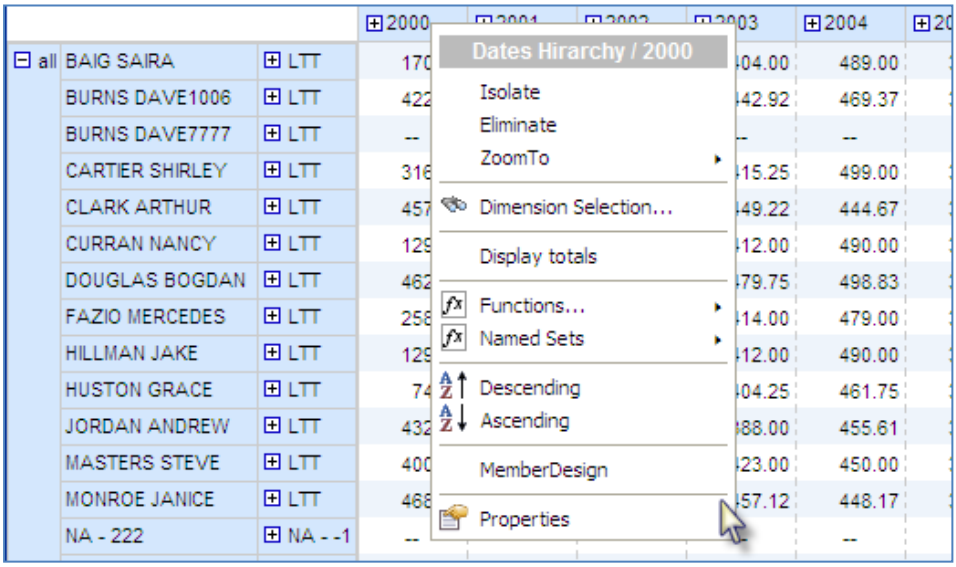
This example displays the results of selecting **Add Dimension Before**.

		2000	2001	2002	2003	2004	2005	2006	2007	2008
all	Amano	442.34	432.00	416.00	433.71	453.95	369.64	389.50	26.25	0.00
	LTT	6,896.24	8,911.00	8,926.66	9,142.53	10,429.59	8,446.55	8,263.00	577.50	232.50
	NA - -1	--	--	--	--	--	--	--	--	--

9. Click **All** on the far left to see the employees names:

			2000	2001	2002	2003	2004	2005	2006	2007	2008
all	BAIG SAIRA	LTT	170.75	403.50	408.00	404.00	489.00	380.00	389.50	26.25	0
	BURNS DAVE1006	LTT	422.25	383.24	425.85	442.92	469.37	393.24	393.50	26.25	89
	BURNS DAVE7777	LTT	--	--	--	--	--	--	--	--	--
	CARTIER SHIRLEY	LTT	316.50	403.50	410.75	415.25	499.00	364.00	389.50	26.25	0
	CLARK ARTHUR	LTT	457.45	396.22	408.00	449.22	444.67	391.80	389.50	26.25	0
	CURRAN NANCY	LTT	129.50	403.50	392.00	412.00	490.00	372.00	389.50	26.25	0
	DOUGLAS BOGDAN	LTT	462.75	387.91	407.50	479.75	498.83	393.98	385.50	26.25	48
	FAZIO MERCEDES	LTT	258.50	403.50	400.00	414.00	479.00	364.00	389.50	26.25	0
	HILLMAN JAKE	LTT	129.50	394.00	416.00	412.00	490.00	372.00	389.50	26.25	0
	HUSTON GRACE	LTT	74.00	390.50	408.00	404.25	461.75	380.00	389.50	26.25	0
	JORDAN ANDREW	LTT	432.00	393.09	382.66	388.00	455.61	395.44	389.50	26.25	11
	MASTERS STEVE	LTT	400.00	490.50	400.00	423.00	450.00	374.00	389.50	26.25	--
	MONROE JANICE	LTT	468.15	452.45	401.40	457.12	448.17	386.79	236.50	26.25	30
	NA - 222	NA - -1	--	--	--	--	--	--	--	--	--
	PARRA LUISA	Amano	442.34	432.00	416.00	433.71	453.95	369.64	389.50	26.25	0
	PERRICELLI JOANNE	LTT	399.75	384.50	400.00	403.00	480.75	372.00	389.50	26.25	0
	PUGLIESE NICHOLAS	LTT	137.50	403.50	408.00	412.00	461.00	372.00	389.50	26.25	--

10. Right-click any dimension in the grid for more menu options.

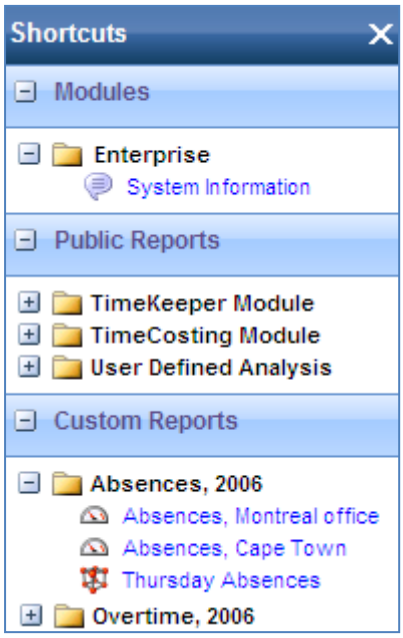


Isolate	Displays only this entity
Eliminate	Removes the selected value from the grid
Zoom to	Enables you to adjust the display to reflect a different hierarchical component
Dimension Selection	Enables you to select another dimension to add to your analysis
Remove Dimension	Removes the selected dimension from the grid
Display Totals	Displays the aggregated data of all entities
Functions	Enables you to add aggregate columns, display averages, etc as a result of a mathematical or statistical calculation.
Descending	Restructures all the values in a column in descending order
Ascending	Restructures all the values in a column in ascending order
Named Sets	*(currently not available)*
Member Design	Set header, background, and text colors for each dimension
Properties	View details for each employee

Saving as a Report

You can save any screen as a report, and access it later at any time to view or modify. For an overview and detailed procedures of all report functionality, see Private Reports.

NOTE: Shortcut icons used to represent custom screens are different from those used to represent regular system reports.



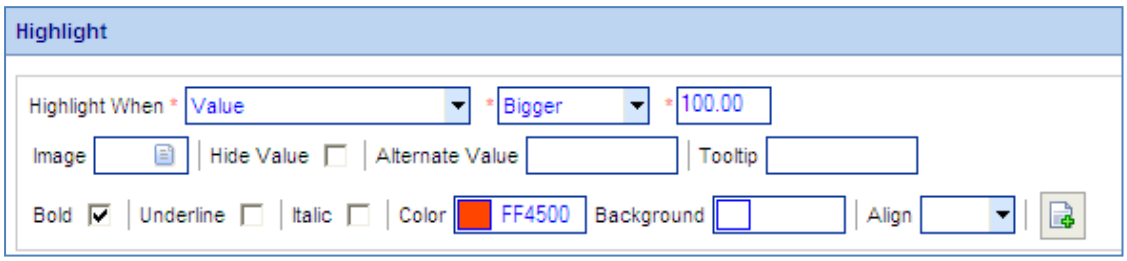
Defining Highlights

To highlight any exceptional values, do as follows:

1. From the toolbar, click . The **Highlights** screen appears.
2. In the **Highlight when** row, enter the criteria that meets the highlight conditions, as follows:

   Highlight when (quantity/value) *(equal/bigger/lesser/between) * {*enter value*}

   For example:



3. In **Bold**, **Underline**, **Italic**, **Color**, **Background**, and **Align**, optionally format the displayed value.

4. When done, click the  icon. The information is cleared from the entry boxes and is displayed in the lower pane of the **Highlights** screen.
5. Click **Save** when exiting the screen. The highlights appear immediately.

			2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
all	BAIG SAIRA	LTT	170.75	403.50	408.00	404.00	489.00	380.00	389.50	26.25	0.00	102.50
	BURNS DAVE1006	LTT	422.25	383.24	425.85	442.92	469.37	393.24	393.50	26.25	89.50	107.10
	BURNS DAVE7777	LTT	--	--	--	--	--	--	--	--	--	103.10
	CARTIER SHIRLEY	LTT	316.50	403.50	410.75	415.25	499.00	364.00	389.50	26.25	0.00	102.50
	CLARK ARTHUR	LTT	457.45	396.22	408.00	449.22	444.67	391.80	389.50	26.25	0.00	103.10
	CURRAN NANCY	LTT	129.50	403.50	392.00	412.00	490.00	372.00	389.50	26.25	0.00	102.50
	DOUGLAS BOGDAN	LTT	462.75	387.91	407.50	479.75	498.83	393.98	385.50	26.25	48.00	109.50
	FAZIO MERCEDES	LTT	258.50	403.50	400.00	414.00	479.00	364.00	389.50	26.25	0.00	102.50
	HILLMAN JAKE	LTT	129.50	394.00	416.00	412.00	490.00	372.00	389.50	26.25	0.00	102.50
	HUSTON GRACE	LTT	74.00	390.50	408.00	404.25	461.75	380.00	389.50	26.25	0.00	--
	JORDAN ANDREW	LTT	432.00	393.09	382.66	388.00	455.61	395.44	389.50	26.25	11.00	103.10
	MASTERS STEVE	LTT	400.00	490.50	400.00	423.00	450.00	374.00	389.50	26.25	--	--
	MONROE JANICE	LTT	468.15	452.45	401.40	457.12	448.17	386.79	236.50	26.25	30.00	126.10
	NA - 222	NA - -1	--	--	--	--	--	--	--	--	--	--
	PARRA LUISA	Amano	442.34	432.00	416.00	433.71	453.95	369.64	389.50	26.25	0.00	103.10

6. To clear the highlights, from the toolbar, click the **Clear** icon.  .

Exporting to an HTML File or an Excel Spreadsheet

To export the current report to an HTML page or an Excel spreadsheet, do as follows:

1. From the toolbar, click the **Export**  icon.
2. Select either HTML or Excel.

Re-arranging the Screen View

Use this option to move the dimensions' axes.

1. Click the **Options**  button.
2. Select **Switch Axes**. The dimensions on the **X** axis move to the **Y** axis:

Before:

		2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
all	Amano	442.34	432.00	416.00	433.71	453.95	369.64	389.50	26.25	0.00	103.10
	LTT	6,896.24	8,911.00	8,926.66	9,142.53	10,429.59	8,446.55	8,263.00	577.50	232.50	2,093.40
	NA - -1	--	--	--	--	--	--	--	--	--	--

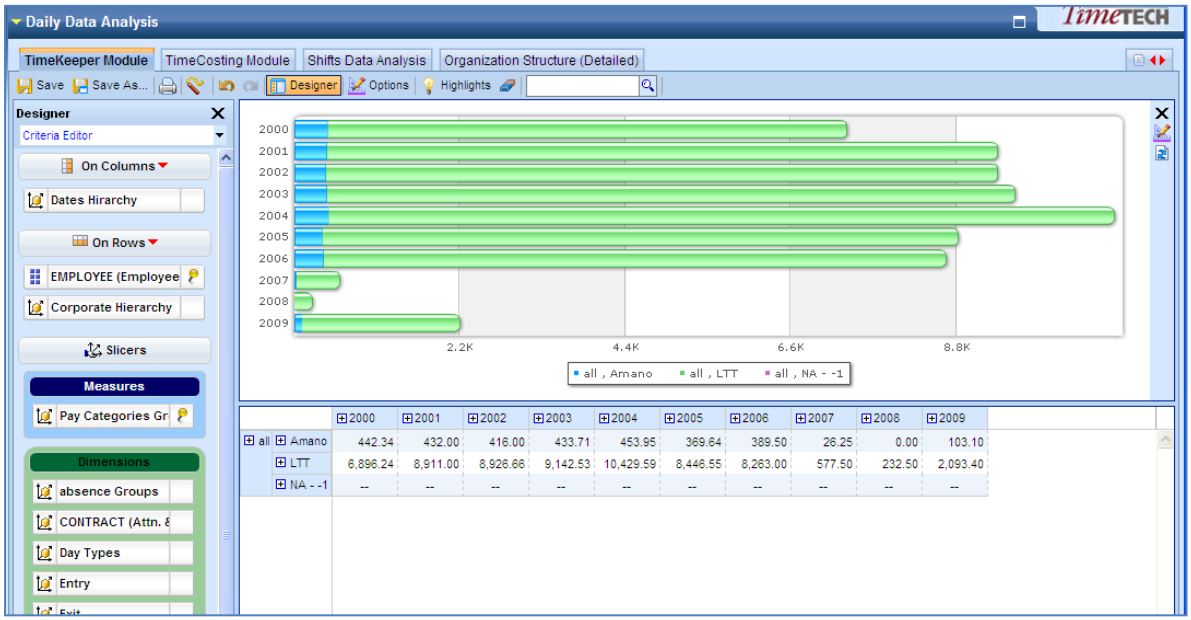
After:

	all		
	Amano	LTT	NA - -1
2000	442.34	6,896.24	--
2001	432.00	8,911.00	--
2002	416.00	8,926.66	--
2003	433.71	9,142.53	--
2004	453.95	10,429.59	--
2005	369.64	8,446.55	--
2006	389.50	8,263.00	--
2007	26.25	577.50	--
2008	0.00	232.50	--
2009	103.10	2,093.40	--

Displaying Graphs

Use this option to display graphic representations of the displayed data.

1. Click the **Options** button.
2. Select **Display Chart on Top**. A graph appears on the top of the grid.



3. Alternatively, click **Display Chart on Bottom**, if you want.
4. To remove the chart, click **Hide Chart**.

Isolating a Dimension

To isolate a dimension in the grid and therefore temporarily remove all other dimensions from the grid display, do as follows:

1. From the grid, right-click the dimension you want to isolate (this example uses **2001**).
2. From the menu, select **Isolate**. All other dimensions are temporarily removed.

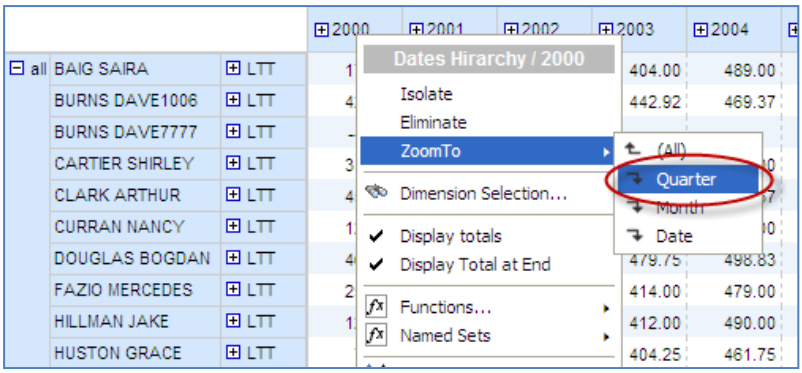
			2001	Total
all	BAIG SAIRA	LTT	403.50	403.50
	BURNS DAVE1006	LTT	383.24	383.24
	BURNS DAVE7777	LTT	--	--
	CARTIER SHIRLEY	LTT	403.50	403.50
	CLARK ARTHUR	LTT	396.22	396.22
	CURRAN NANCY	LTT	403.50	403.50
	DOUGLAS BOGDAN	LTT	387.91	387.91
	FAZIO MERCEDES	LTT	403.50	403.50
	HILLMAN JAKE	LTT	394.00	394.00

Zoom to

Zoom to adjusts the grid display and enables you to view a different hierarchical component – a sub-entry - of that dimension or criteria.

To use **Zoom to**, do as follows:

1. Right-click any dimension or criteria on the grid that represents a hierarchy.
2. Select **Zoom to** from the menu, and select the sub entry. See the example for the year **2000**:



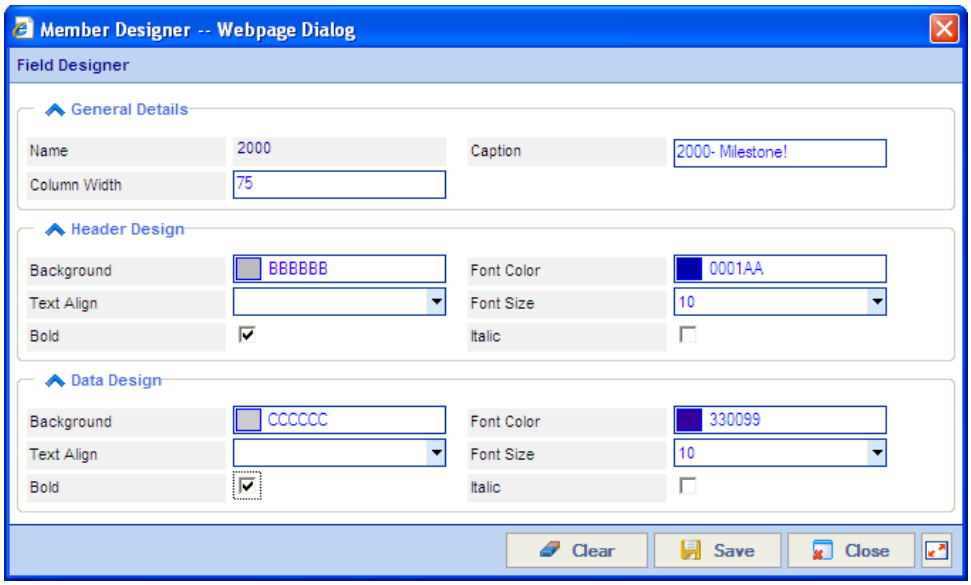
			2000/Q1	2000/Q2	2000/Q3	2000/Q4	Total
all	BAIG SAIRA	LTT	--	--	64.00	106.75	170.75
	BURNS DAVE1006	LTT	109.50	115.00	98.50	99.25	422.25
	BURNS DAVE7777	LTT	--	--	--	--	--
	CARTIER SHIRLEY	LTT	16.00	96.00	97.00	107.50	316.50
	CLARK ARTHUR	LTT	115.30	117.00	108.00	117.15	457.45
	CURRAN NANCY	LTT	--	--	24.00	105.50	129.50
	DOUGLAS BOGDAN	LTT	112.00	117.00	117.00	116.75	462.75
	FAZIO MERCEDES	LTT	--	64.00	105.00	89.50	258.50
	HILLMAN JAKE	LTT	--	--	24.00	105.50	129.50
	HUSTON GRACE	LTT	--	--	--	74.00	74.00

Using Member Design

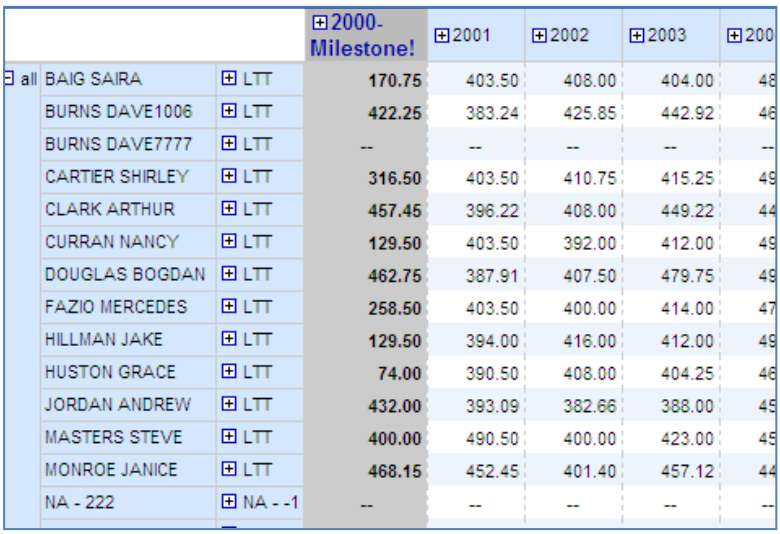
The **Member Design** screen enables you to change the screen display for a dimension by defining headers, background, font colors and font size.

1. To use the **Member Design** screen, do as follows:

2. Right-click the dimension whose screen display you want to change. The **Member Designer** screen appears.
   - In **General Details**, in **Column Width**, enter your desired column size, and in **Caption**, enter a new caption to replace the current one.
   - In **Header Design**, enter any changes to the header cell in **Background**, **Text Align**, **Font Color**, and **Font Size**. Select **Bold** and **Italic** if you want.
   - In **Data Design**, enter any changes to the text in **Background**, **Text Align**, **Font Color**, and **Font Size**. Select **Bold** and **Italic** if you want.
3. Click **Clear** if you want to clear the settings. See the example for the **2000** column:



4. Click **Save** and then **Close**. The changes to the grid appear immediately.



			2000- Milestone!	2001	2002	2003	200
all	BAIG SAIRA	LTT	170.75	403.50	408.00	404.00	48
	BURNS DAVE1006	LTT	422.25	383.24	425.85	442.92	46
	BURNS DAVE7777	LTT	--	--	--	--	--
	CARTIER SHIRLEY	LTT	316.50	403.50	410.75	415.25	49
	CLARK ARTHUR	LTT	457.45	396.22	408.00	449.22	44
	CURRAN NANCY	LTT	129.50	403.50	392.00	412.00	49
	DOUGLAS BOGDAN	LTT	462.75	387.91	407.50	479.75	49
	FAZIO MERCEDES	LTT	258.50	403.50	400.00	414.00	47
	HILLMAN JAKE	LTT	129.50	394.00	416.00	412.00	49
	HUSTON GRACE	LTT	74.00	390.50	408.00	404.25	46
	JORDAN ANDREW	LTT	432.00	393.09	382.66	388.00	45
	MASTERS STEVE	LTT	400.00	490.50	400.00	423.00	45
	MONROE JANICE	LTT	468.15	452.45	401.40	457.12	44
	NA - 222	NA - -1	--	--	--	--	--

5. Repeat for other dimensions if needed.