

# TimeKeeper Analytics

## User Guide



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**Date:** October 26, 2010

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**Document Version 1.10 (Internal)**

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## Getting Started with TimeKeeper Analytics

- To read about Lavie TimeTECH and its family of workforce management products, go to [About Lavie TimeTech](#) and [Lavie Software Solutions](#).
- To install TimeKeeper Analytics, go to [Installation](#).
- To read a brief overview of TimeKeeper Analytics, its functionality, usage, and benefits, go to [About TimeKeeper Analytics](#).
- To learn about TimeKeeper Analytics' main interface, go to [Understanding the Main Interface](#).
- To view and filter graphic representations of the daily attendance data accumulated by the TimeKeeper module, go to [Analyzing Data from the TimeKeeper Module](#).
- To view and filter graphic representations of the period attendance data accumulated by the TimeKeeper module, go to [Analyzing Data from the TimeKeeper Module](#).
- To view and filter graphic representations of the daily job allocation and labor distribution data accumulated by the TimeCosting module, go to [Analyzing Data from the TimeCosting Module](#).
- To view and filter graphic representations of the periodic job allocation and labor distribution data accumulated by the TimeCosting module, go to [Analyzing Data from the TimeCosting Module](#).
- 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](#).

## **Introduction**

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

### **About Lavie TimeTech**

Lavie TimeTECH is one of the world's leading suppliers of Time and Attendance Management. Our package of advanced Time and Attendance 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.

Lavie TimeTECH specializes in the development and implementation of cutting-edge software solutions for human capital management. The company's innovative human resources life-cycle management solutions enable organizations to support employees throughout their service with the company, from recruitment and integration within the organization, through time and attendance data collection and analysis, and its export to the payroll system.

Lavie software solutions and their unique interface are integrated with the organization's systems such as payroll and ERP for over 5,500 clients worldwide, and are used by more than 4,000,000 employees. Our solutions serve as management tools for organizations of 50-20,000 employees in a range of business segments, including government offices and institutions, local authorities, hospitals and long-term care facilities, hotels, the manufacturing and automotive industry, retail, financial institutions, high-tech and electronics, outsourcing and recruitment agencies, and more.

### **Lavie Software Solutions**

Lavie TimeTech's product suite provides a complete workforce solution that is equipped to respond effectively to any HR challenge. Additional modules enhance labor monitoring, carefully tracking time and cost elements:

#### **TimeKeeper**

TimeKeeper is a Time and attendance (T&A) software solution that continually collects employee in/out time, analyzes it based on employment agreements, and automatically exports it to the payroll system, ERP, or any other HR system. TimeKeeper provides error and irregularity reports, as well as other T&A reports. The system has retroactive updating capabilities of attendance/absence.

Based on a flexible rule-based architecture, TimeKeeper is easily customized to meet all payroll and financial tracking tasks. With Lavie TimeTECH's customized time and attendance solutions companies can save 1-3% of their annual payroll expenses, by reducing payroll errors and processing time, decreasing unauthorized leave time, improving labour reporting and more.

### **TimeCosting**

TimeCosting is an activity based costing module that collects, analyzes and monitors labor distribution and job allocation information. It actively tracks both time and cost elements associated with each aspect of activity. All relevant database information is commonly shared by both TimeCosting and TimeKeeper. Time and Attendance pay-rules defined in TimeKeeper can be automatically applied to labor costs analysis.

### **iBrowse**

Web enabled solution, operates in Internet/intranet configurations, providing both employees and supervisors with remote access to the T&A application, to view/report/approve attendance/absence/activities information.

### **TimeScheduling**

Time Scheduler makes it easy to plan employees scheduling and tasks for an employee, department or customized group. Using simply mastered tools, you can quickly build multiple schedules, rotate shifts and use templates to forecast overtime allocation.

### **Absence Planner**

APM (Absence Planning Module) is a powerful planning tool that gives supervisors and department heads a complete picture of employee absences. It helps them to evaluate how personal entitlement to time off can be balanced against future operational needs.

### **Absence Request**

This feature allows you to request absences, such as Vacation time, by means of our internet / intranet based module - the iBrowse. Supervisors automatically get notified with an email that enables them to approve or decline the absences.

### **Overtime Equalization**

Overtime Equalization (OTE) displays overtime offered, accepted, refused and hours actually worked. OTE highlights the 'next eligible' employee in line for overtime allocation. It gives department heads and supervisors a precise and objective way to allocate overtime hours.

### **Benefit Accruals**

Benefit Accrual Module is an add-on to the TimeKeeper core system that provides an automated "tool" for managing the accrual of absences such as vacation, sick leave *etc.* and usage of employees benefit hours in accordance with your company's benefit policies.

### **TimeBank**

TimeBank manages stores and carries forward pay-period values "banked hours" from one pay-period to the next. TimeBank can be regarded as a "savings account", i.e. a stored amount of hours that can be added to and/or deducted from, on a pay-period basis (similar to a salary which is added to a bank account each pay-period) or as a one-time occurrence (similar to a cash withdrawal/deposit).

### **Access Control**

Access Control is the Impro or Rosslare system that serves as an integral part of the organization's security systems. Manages entrance/exit authorizations to the organization and to specified locations to prevent the entry of unauthorized individuals. Fully integrated with the T&A solution.

## About TimeKeeper Analytics

**TimeKeeper Analytics** is a comprehensive business intelligence module that helps you improve workforce performance. It is an executive information system (EIS) that leverages untapped data in the TimeKeeper and TimeCosting suite to help managers make decisions that reduce costs, increase effectiveness, and improve employee satisfaction.

**TimeKeeper Analytics** allows organizations to:

- Analyze data from multiple systems; including time and attendance and activity-based costing to give managers previously unavailable analysis capability.
- Manage with key performance indicators at a glance, allowing managers to respond to lags with immediate corrective action.
- Monitor results over time. See what works, view trends, compare workforce effectiveness between locations, pinpoint problematic areas, and promote accountability throughout the organization.

## Key Features of TimeKeeper Analytics

- **Dashboards:** Choose which performance metrics need to be accessible at a glance with customizable views of key data, such as overtime, lateness etc.
- **Ad hoc queries:** Modify views on the go using the slicer to capture the information you need.
- **Export reports** to multiple formats, including Microsoft<sup>®</sup> Excel and HTML.
- **Business rules:** Integrate data from Lavie TimeTECH's suite components, such as TimeKeeper and TimeCosting to apply business rules and calculate metrics through extract, transform, and load routines.
- Provide enterprise-ready Time and Attendance business intelligence solutions on top of Lavie TimeTECH's products platform.
- **Business intelligence technologies:** Utilize the rich reporting and analytic environment including relational- and multi-dimensional cubes (OLAP).
- **TimeKeeper Analytics** takes advantage of the superior performance and scalability of Microsoft<sup>®</sup> SQL Server<sup>®</sup> and Microsoft<sup>®</sup> Office System to provide integrated enterprise solutions for performance measurement, analysis and reporting.
- Choose data, charts and image objects and insert them into the report using drag and drop placement.
- Easy to use and intuitive user interface.

## Advantages of TimeKeeper Analytics

- **Pay period comparison** – Allows comparing two user-defined pay periods, in order to identify irregularities.
- **Flexible and robust tools** that allows any user to retrieve and easily display the "Top 10" or the "Bottom 10" performers in any of the critical measured time

and attendance factors and share them inside and outside the corporate firewall.

- A view of the Overtime Analysis by department.

### Benefits of TimeKeeper Analytics

- Accesses and displays data from multiple modules.
- Allows users to view data and workforce management information in a way that is useful for them.
- Facilitates communication and collaboration using public folders for implementing a single version of the truth.
- Moves seamlessly from performance monitoring to analysis and reporting with a single-click.
- Helps to spot performance trends by using analysis of KPIs.
- Increases efficiency – Spend less time searching through vast amount of data to find the "right" workforce management information you need to address a specific business issue.
- Automatically uncovers hidden yet critical workforce management information that impacts your decisions and your results using TimeKeeper Analytics' proactive intelligence and logic.
- Improves focus – Access the right workforce management information to improve the quality of your decisions and raise the probability of improved results.

### How TimeKeeper Analytics Works

**TimeKeeper Analytics** analyzes data stored in 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 immediate and accurate answers to questions regarding your organization's performance.

**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 and quantities, 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*.

**TimeKeeper Analytics** is easy and intuitive. Most screens require selecting *dimensions*, which are the corporate hierarchy 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 (see [Dimensions Selection](#) for details). 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 select additional dimensions and re-generate the results. In certain screens, filtering is possible by directly clicking the bars and columns found in the graphs. **TimeKeeper Analytics** enables you to 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. The possibilities are endless!

### Examples of Analysis Possibilities

- Presentation of work length trend (attendance/tasks) over a period of time (day/month/quarter/year or defined pay periods)
- Comparison of report data (presence/tasks) between one organizational unit and another
- Comparison data reports between employees
- Display of various indexes (criteria) such as: lateness, overtime etc.
- Data display according to employee history (reports by the same employee to different depts.)
- Hours reports data over different professions/agreements

### TimeKeeper Analytics and Security

**TimeKeeper Analytics** complies with market-standard security practices for *authentication* and *accessibility*.

- **Authentication** – **TimeKeeper Analytics** can be accessed only by authorized users.

- **Accessibility –TimeKeeper Analytics** provides data restriction for each user by displaying only data relevant to that user, based on the user credentials in the TimeKeeper system

## **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 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.

## **Tech Support and Product Information**

For information about LavieTimeTECH products and services, see the can be found on the LavieTimeTECH website:

<http://www.lavietimetech.com>

Alternatively, contact your LavieTimeTECH account executive and contact point.

## Documentation Department

Lavie TimeTech takes customer satisfaction seriously. We have invested in our documentation in order to ensure its clarity, accuracy, and ease-of-use. Any comments and feedback regarding **TimeKeeper Analytics** product documentation, including corrections or requests for clarification, should be directed to:

[DocSupport@ lavietimetech.com](mailto:DocSupport@lavietimetech.com)

**IMPORTANT:** Your particular software version may contain updates and changes introduced after this manual was published. Refer to your dealer if you encounter discrepancies of this nature.

## Documentation Standards

The following table lists the text styles used in this book and their meaning.

Text Format	Examples	Notes
<b>ScreenText</b>	<ul style="list-style-type: none"> <li>Expand <b>Master File Maintenance</b>.</li> <li>Double-click the <b>Vendors</b> icon.</li> <li><b>File &gt; Save As...</b></li> </ul>	Refers to components in the Windows or LavieTimeTECH product interfaces, including menu options, window names, field labels, buttons, and tab names. Also used to denote keyboard and mouse actions.
<i>Italic</i>	Resting the mouse pointer over a button causes its name and function to appear in a <i>QuickTip</i> .	Used to signify new words and key concepts.
<b>Code</b>	<ul style="list-style-type: none"> <li><b>C:\Program Files\</b></li> <li><b>ITEM_ID</b></li> <li><b>App.exe/ &lt;username&gt;</b></li> </ul>	Indicates command-line commands (including parameters and variables), file directories and names, and database tables and fields.

Generally, our software manuals use industry-standard terminology and phrasing, particularly when describing specific user actions with input devices such as keyboards and mice. The following table provides brief examples:

Function	Examples	Notes
<b>Key, Key</b>	Press <b>F1, F1, F2</b> to edit the Help for <b>Price Review</b> form	The commas indicate that these keys are pressed and released in the designated sequence.
<b>Key+Key</b>	Press <b>Ctrl+G</b> to display the <b>Item Detail</b> record.	The plus sign indicates that the first key should be pressed and held while the second key is pressed, then both keys are released at the same time.

Click right-click	Click <b>OK</b> .	<p>Right-click the grid and choose the field you want to display.</p> <p>We assume a standard right-handed mouse configuration. Use of the left (primary) mouse button is specified as “click,” and use of the right (secondary) mouse button is specified as “right-click.”</p>
click and drag	You can rearrange columns in a grid by clicking and dragging them into a new position on the grid.	This is a mouse function that is used to move objects on the screen. With the mouse pointer on the object, press the left button down and hold it while moving the item to the new location.

### Related Documents

- TimeKeeper Analytics Quick Reference Guide

## Installation

This section is for IT managers and systems administrators responsible for maintaining, installing, updating company hardware and software, and running systems jobs.

To install TimeKeeper Analytics, you must review and implement **all** the following sections:

- [Installation Prerequisites](#)
- [Description of Installation Components](#)
- [Creating Analysis Groups](#)
- [Installing TimeKeeper Analytics](#)

### Installation Prerequisites

Prior to installation, ensure the following:

- Timekeeper has been upgraded to TimeKeeper SQL 2005
- The server is designated to TimeKeeper and **TimeKeeper Analytics** only, and not host any other parallel working applications (recommendation)
- The server hosting **TimeKeeper Analytics** is configured to support access via the internet
- The user who performs the installation is authorized to database administrator privileges
- Flash Player Version is installed on each workstation slated for **TimeKeeper Analytics**

Criteria	Minimum Requirements	Recommended Requirements
<b>Servers Architecture</b>	1 server, hosting both TimeKeeper and TimeKeeper Analytics	2 servers: <ul style="list-style-type: none"> <li>• One hosting existing TimeKeeper database</li> <li>• One hosting TimeKeeper Analytics application</li> </ul>
<b>Operating System</b>	Windows Server 2003 + <b>Service Pack 2</b> Or Windows Server 2008	
<b>Database</b>	Microsoft SQL Server 2005 <b>Service Pack 2</b> or higher Or Microsoft SQL Server 2008 + <b>SQLXML4</b> + <b>Microsoft ADOMD.NET</b> (SqlServer2005_ADOMD_x64.msi <b>OR</b> SqlServer2005_ADOMD.msi (x86) )	

<b>Web</b>	IIS 6.0 or higher	
<b>Environment</b>	.Net Framework 2.0 IIS-ASP.NET version 2.0.50727	
<b>CPU</b>	2 X Dual Core CPUs	2 X Quad Core CPUs
<b>RAM</b>	4GB	8GB
<b>Storage</b>	Depends on customer TimeKeeper DB size and customer usage of modules. <b>NOTE: To be determined together with the Lavie implementer.</b>	
<b>SQL Components</b>	Server 2005 Analysis Services (SSAS) SQL Server Integration Services (SSIS)	

- Decide which categories for analysis your company needs in the system and how you want these categories grouped. Your TimeKeeper Analytics dealer can aid in this function

### System Permissions/Authorization

- Database administration on the **TimeKeeper Analytics** server with local\_admin permissions on the TimeKeeper server
- Permission to run an SQL job on the TimeKeeper server which runs SSIS components reading data from the TimeKeeper software
- A user with permission to run DLL files on the TimeKeeper server
- A user with permission to run services on the TimeKeeper server

### Purchasing the Database without the Viewer

It is possible to purchase TimeKeeper Analytics without the Viewer, and as a result use the OLAP cubes through a different tool. If so, note the limitations:

**NOTE:** Connecting to the OLAP cubes via different tools is solely the responsibility of the customer.

1. There is no support for your predefined security authorizations (i.e. in which you define for each user which employee's data he/she can view), and as a result users will be able to see all other employees' data. See [TimeKeeper Analytics and Security](#).
2. The application which includes the viewer checks a user's predefined language (as defined in the TKSQL as the primary language) and automatically provides an applicable interface. Without it, the language needs to be defined for each user in order to provide that user with an applicable interface.

3. The product will not support synonyms, for example, if the customer changes the name of PLANT, the OLAP cube will not show the change.
4. Although there is no change in the installation process, without a license for the Viewer, the customer will be unable to use it.

### Windows 2008

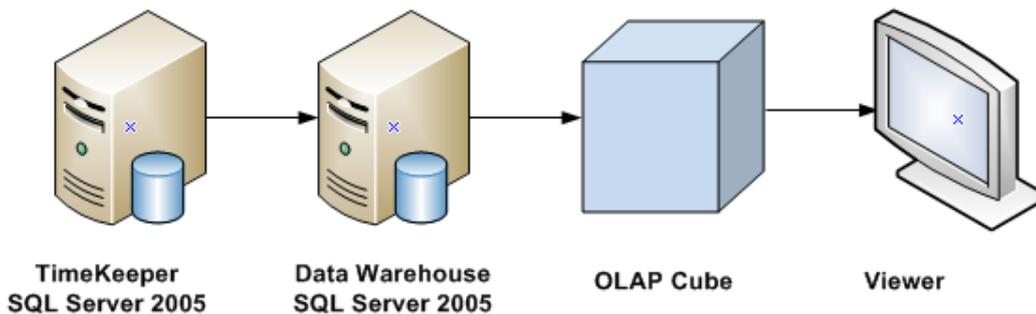
There is currently support for 32- and 64- bit versions. The following component:

SQLServer2005\_ADOMD\_x64.msi or SQLServer2005\_ADOMD.msi(x86) can be downloaded from [here](#).

### Description of Installation Components

#### General

The Business Intelligence process is built on Microsoft components and querying applications from the Viewer application. The system reads data from the database and transfers them to the Data Warehouse on the server. Above the Data Warehouse there is an OLAP cube database which analyzes data via Viewer application servers.



### Installation Procedure

- The installation process creates three databases, a virtual library, and some DLL files.
- There is no writing to the Registry during installation.
- The installation process creates a folder containing all the SQL Server Integration Services files.
- The installation folder size is approximately 250 MB.

### Installed Database

- The Data Warehouse that saves all **TimeKeeper Analytics** data.
- The database that saves all the Viewer definitions (this is a web-querying tool that queries OLAP cubes).
- The OLAP cube's database.

## Virtual Libraries

There are two installation possibilities:

- A default website on port 80 (recommended installation )
- A new website with a new port (currently not supported)

## Memory Utilization

The process uses CPU resources in the following cases:

- Processing SQL jobs loading new data (usually a daily job scheduled to run at night)
- Processing the OLAP cube – at the end of the daily job
- Querying the OLAP cube

**NOTE:** It is possible to limit the number, according to need, of processors using SQL Server.

## Backup

It is recommended that **TimeKeeper Analytics** undergo daily backup. The database is approximately 10 MB.

## Creating Analysis Groups

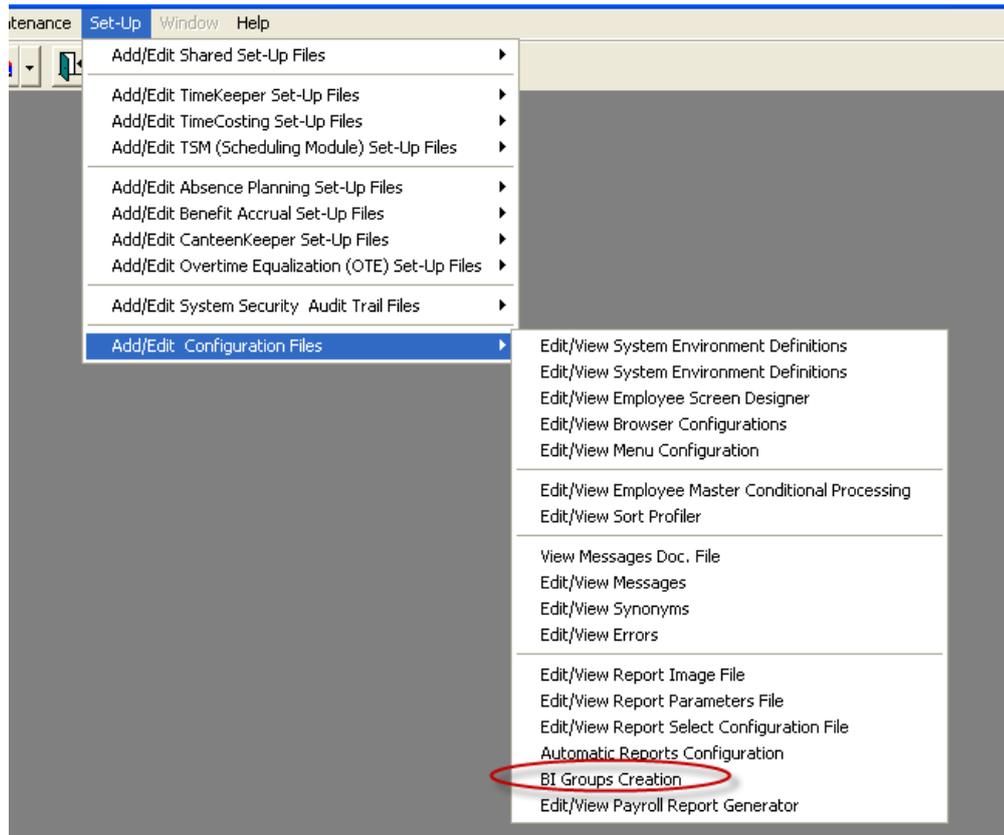
In TimeKeeper Analytics there are currently several criteria available for analysis (these differ per customer) which by default are not grouped by category. For example, these include the following:

- Various (attendance) overtime-related criteria such **100%**, **125%**, and **150%**
- Pay categories such as **vacations**, **sicknesses**, **shifts**, etc.

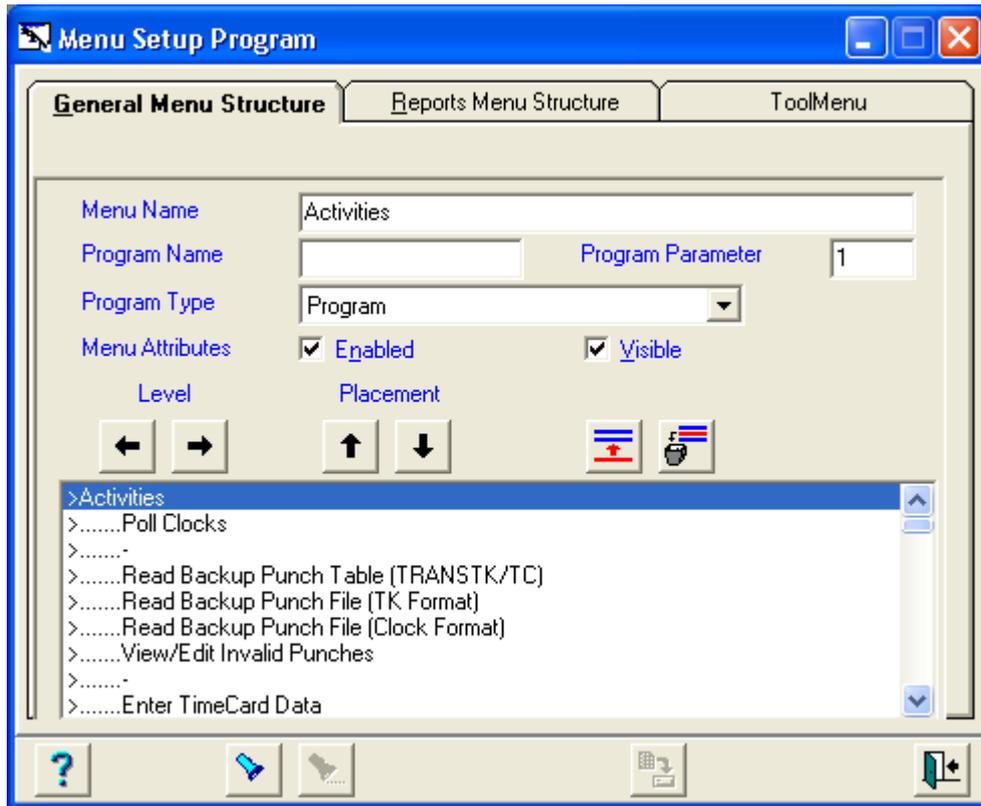
This procedure enables you to create more effective analyses by grouping these and other related criteria into relevant categories, and then sub-categories. For example, the overtime criteria such as **100%**, **125%**, and **150%**, can be defined to the **Absences** category. Then, you can create a sub-category called **Overtime**, and define them to it.

To create these analysis groups, do as follows:

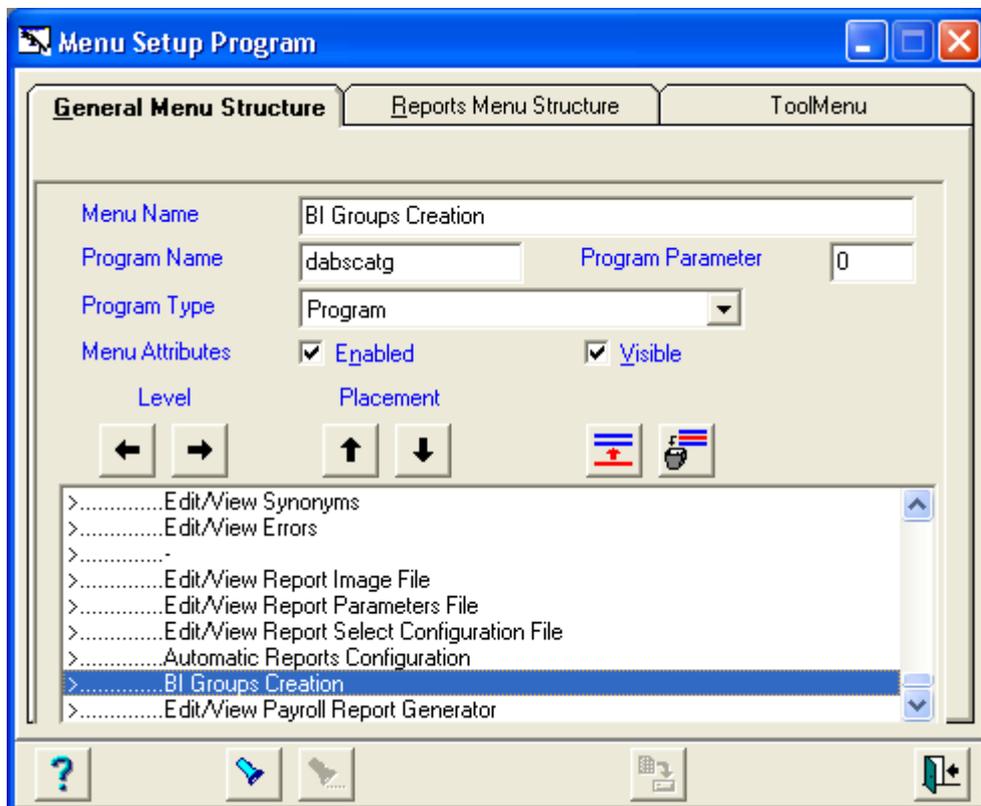
1. From the TimeKeeper menu bar, select **Setup > Add/Edit Configuration Files**. Verify that a menu item called **BI Group Creation** (or similar) exists.



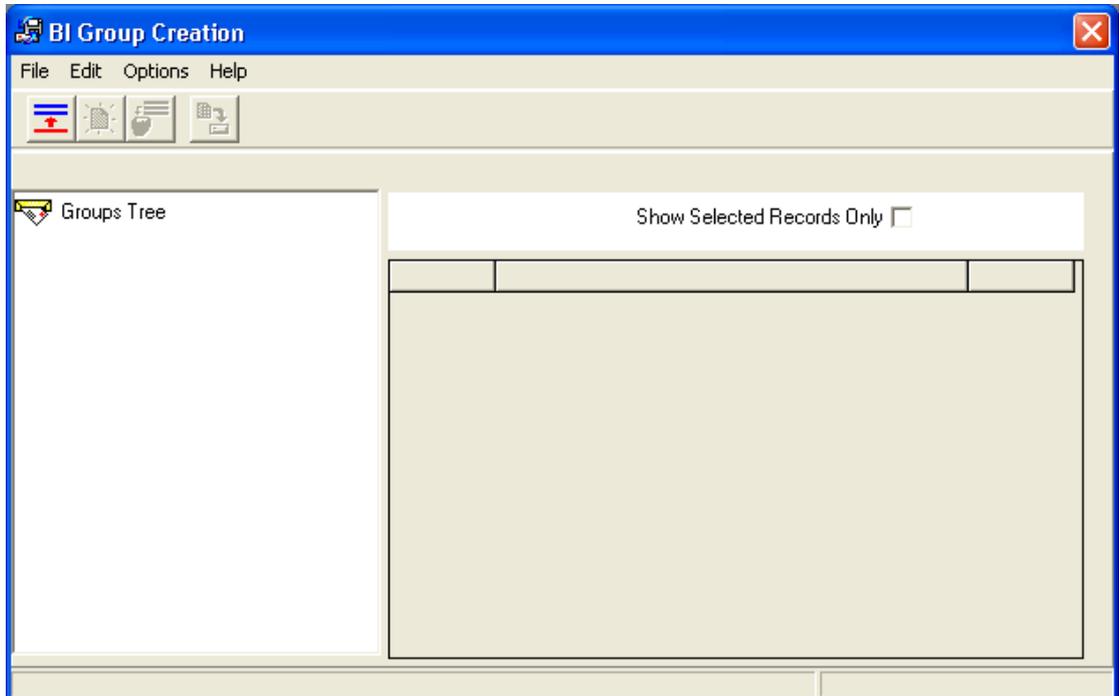
- If it exists, skip to step [6](#).
  - If it does **not** exist, follow this procedure in order and continue with the next step.
2. From the TimeKeeper menu bar, select **Setup > Add/Edit Configuration Files > Edit/View Menu Configuration**. The **Menu Setup Program** window is displayed.



3. Click the **General Menu Structure** tab, if isn't already selected.
4. Scroll to the bottom and add a group called **BI Groups Creation**, as follows:

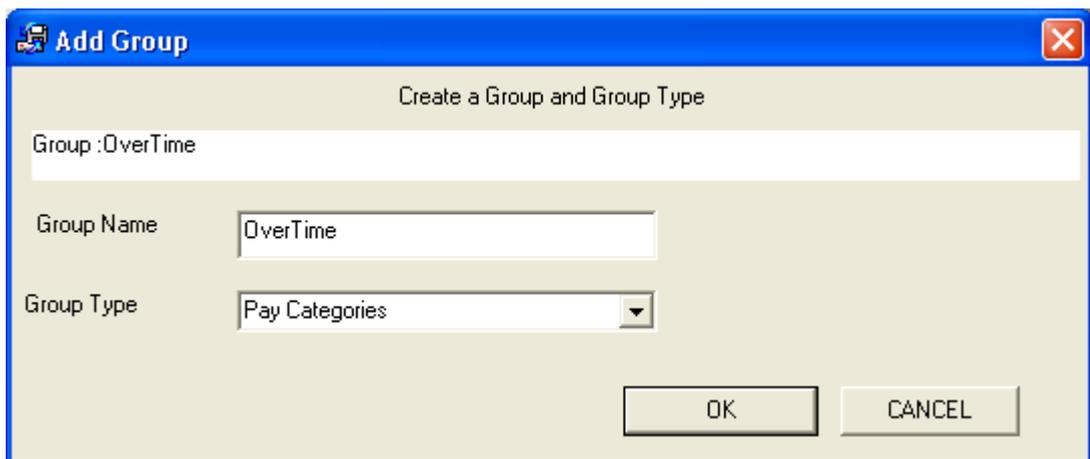


5. Close and then re-enter (via login) TimeKeeper.
6. From the TimeKeeper menu bar, select **Setup > Add/Edit Configuration Files > BI Group Creation**.

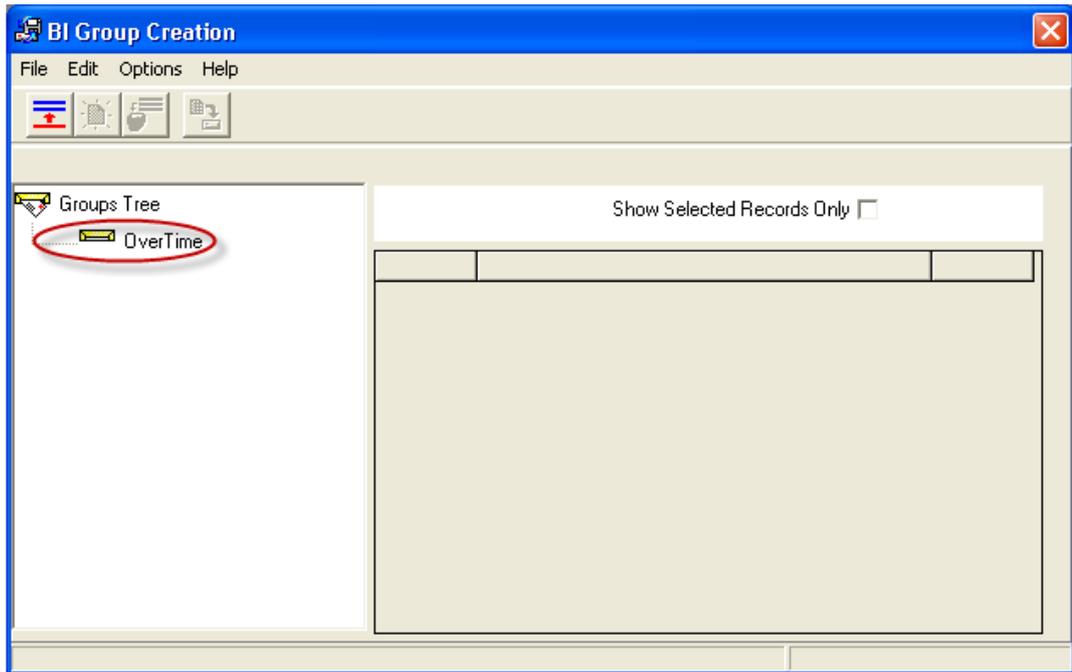


7. From the menubar, select **Edit > Add Group**. The **Add Group** Window is displayed.
8. In **Group Name**, enter an appropriate name for the group, such as **Vacation**.
9. In **Group Type**, select **Pay Categories** or **Absence**.

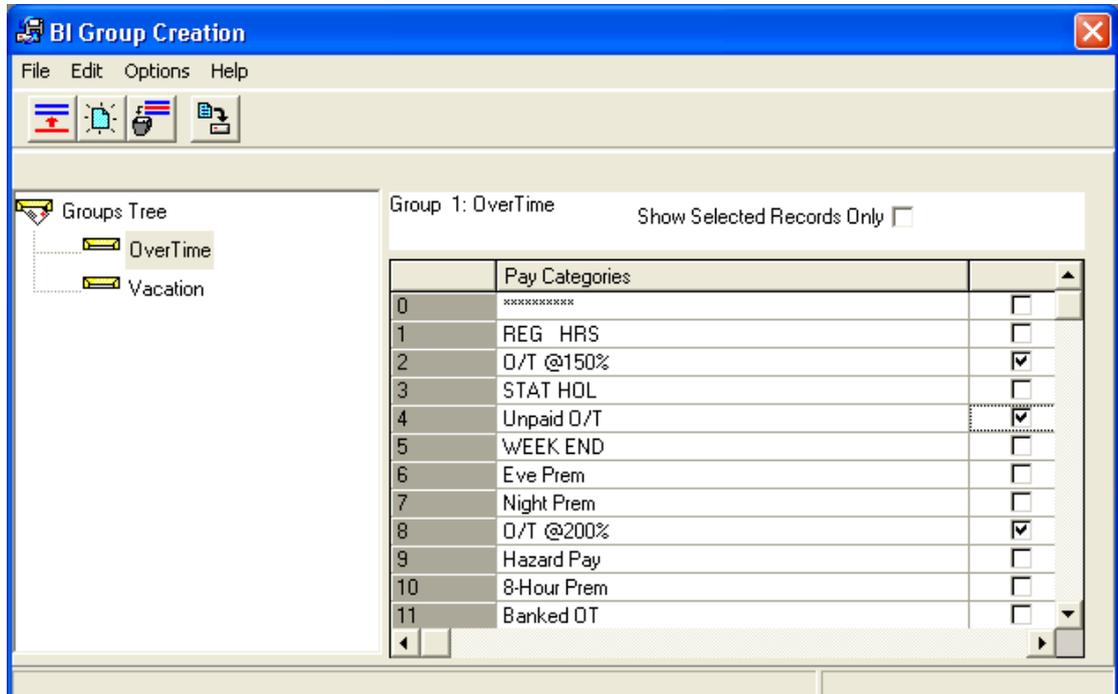
**NOTE:** **Pay Categories** and **Absence** are default and cannot be modified or deleted.



10. Click **OK**. Note that after creating a BI group, the group is displayed in the left pane of the Groups Tree, as shown here:



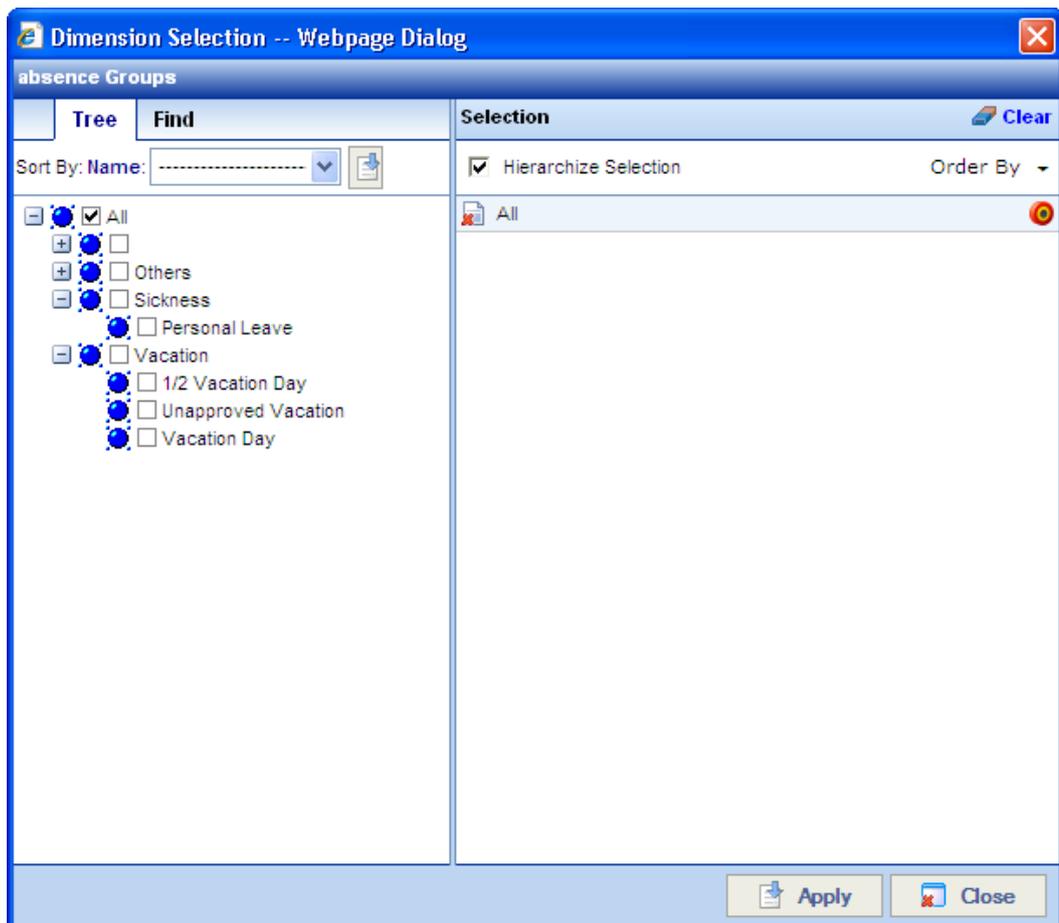
11. From the left pane, double-click that group to open the categories (comes from **Table A** in TK-SQL).
12. From the checkbox on the right, select the correct components for the group that you are creating. See the example:



13. Click **Save** when done.



14. Re-do the procedure to create additional groups.
15. At a later stage, after installation, **verify the groups and categories** by viewing them from inside TimeKeeper Analytics. The example created in this procedure should look like this:

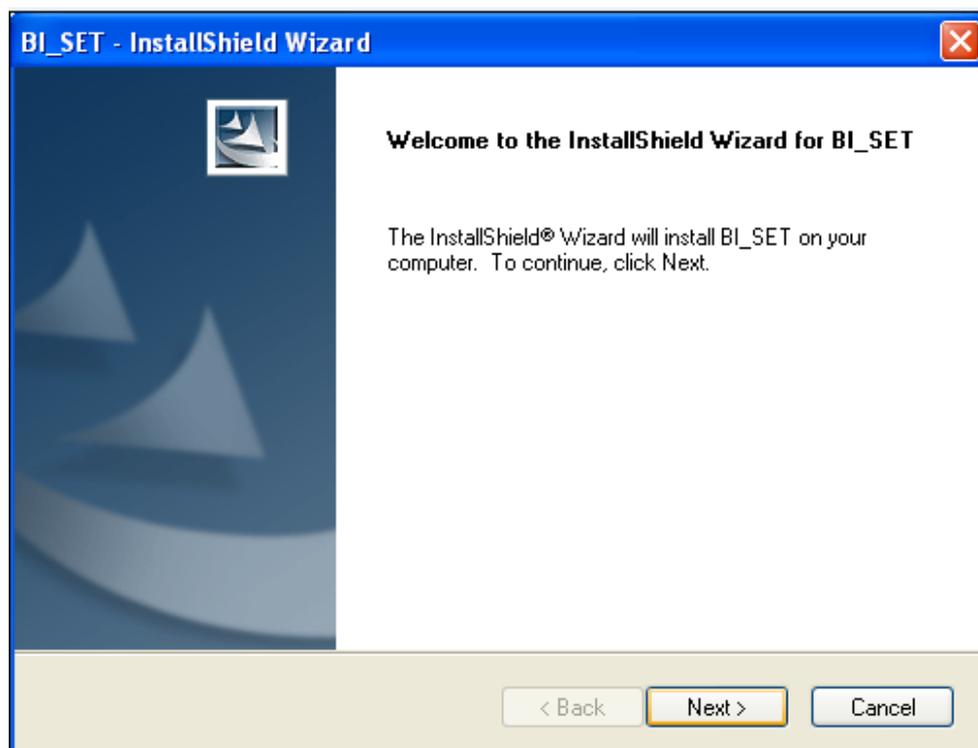


## Installing TimeKeeper Analytics

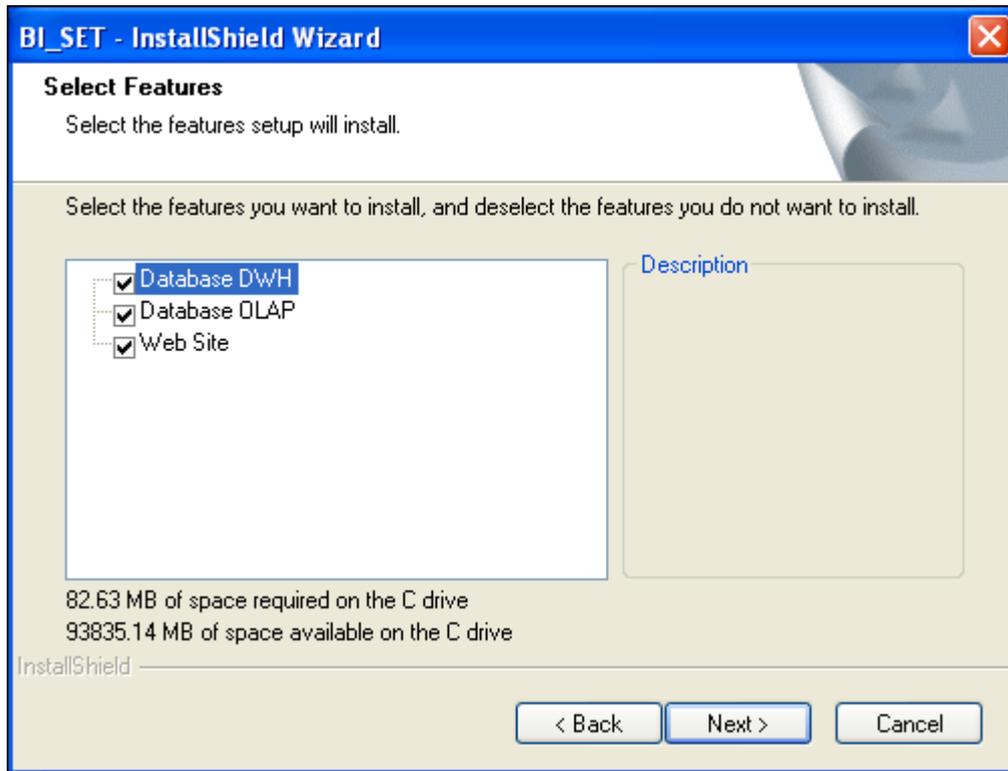
NOTE: Before you perform the actual installation, ensure that you have reviewed all guidelines and procedures in the previous section

To install **TimeKeeper Analytics**, do as follows on the relevant server:

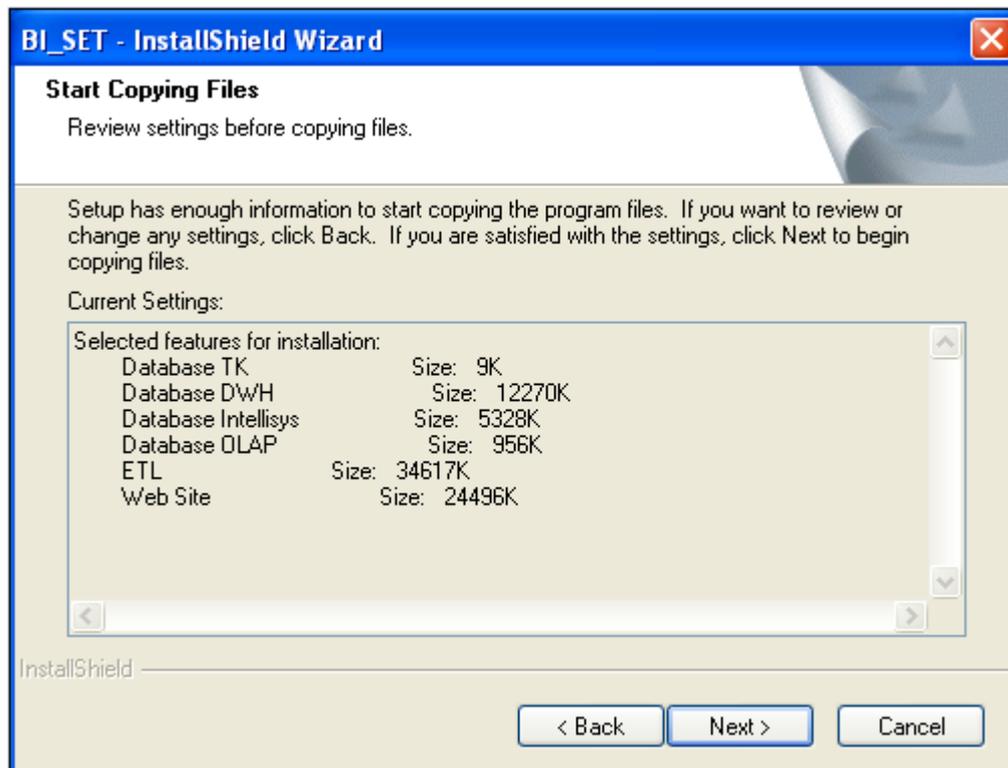
1. Download the installation file or enter an installation CD.
2. From the **TimeKeeper Analytics** installation file, click **BI\_SET.exe**. The **Setup Type** wizard appears.
3. In the **BI-SET –Installation Wizard**, in the first screen that is displayed (the "Welcome" screen), click **Next**.



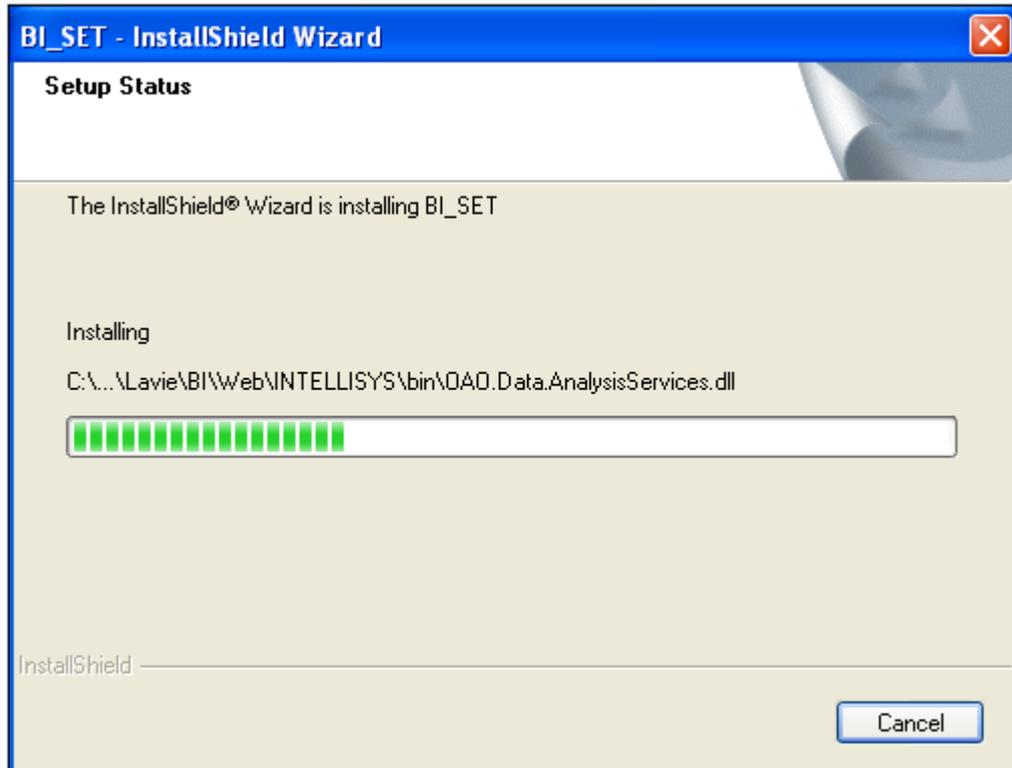
- In the **Select Features** area, select all the features you want to install, and click **Next**.



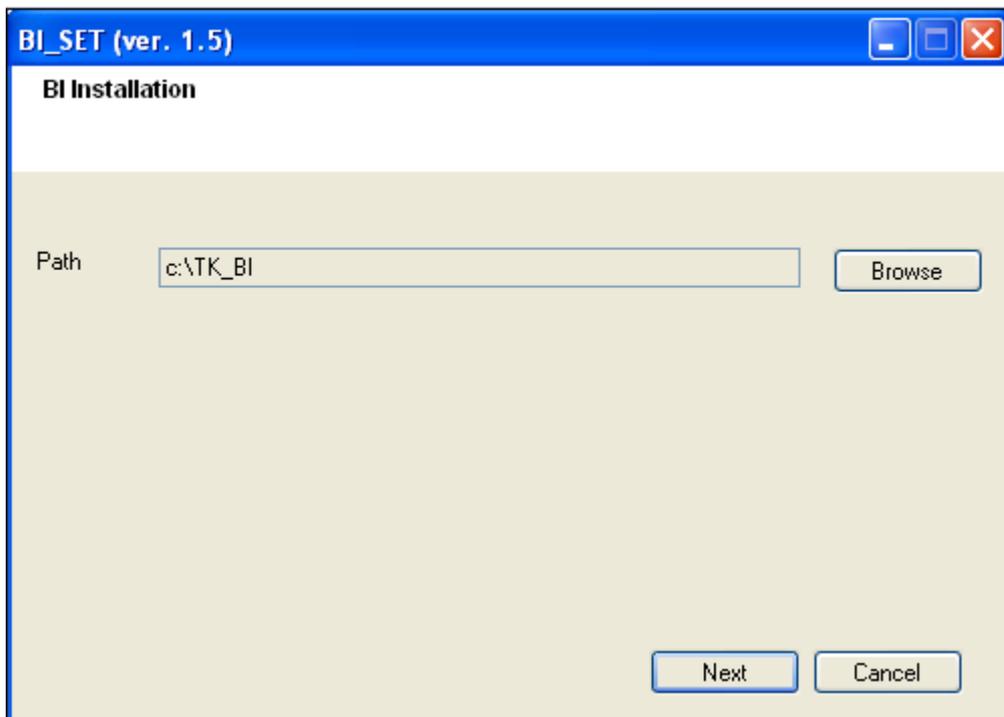
- In the **Start Copying Files** screen, verify the current settings, and click **Next**.



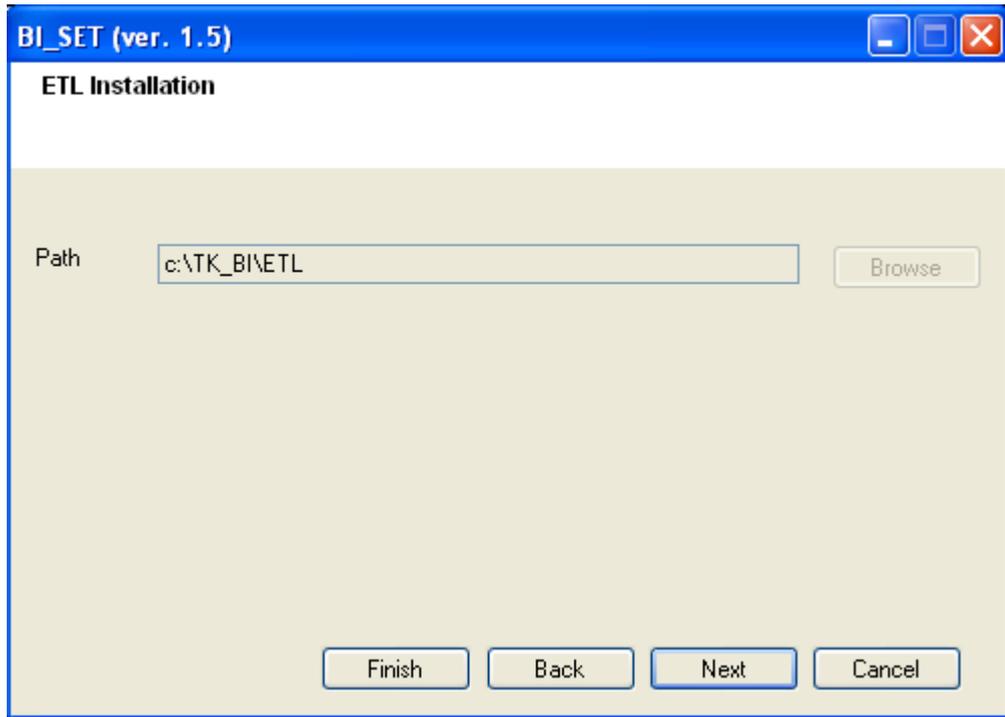
- In the **Setup Status** screen, you can watch the installation's progress.



7. When finished, the **BI Installation** screen is displayed. Select the path of the directory where the BI files will be installed, and click **Next**.

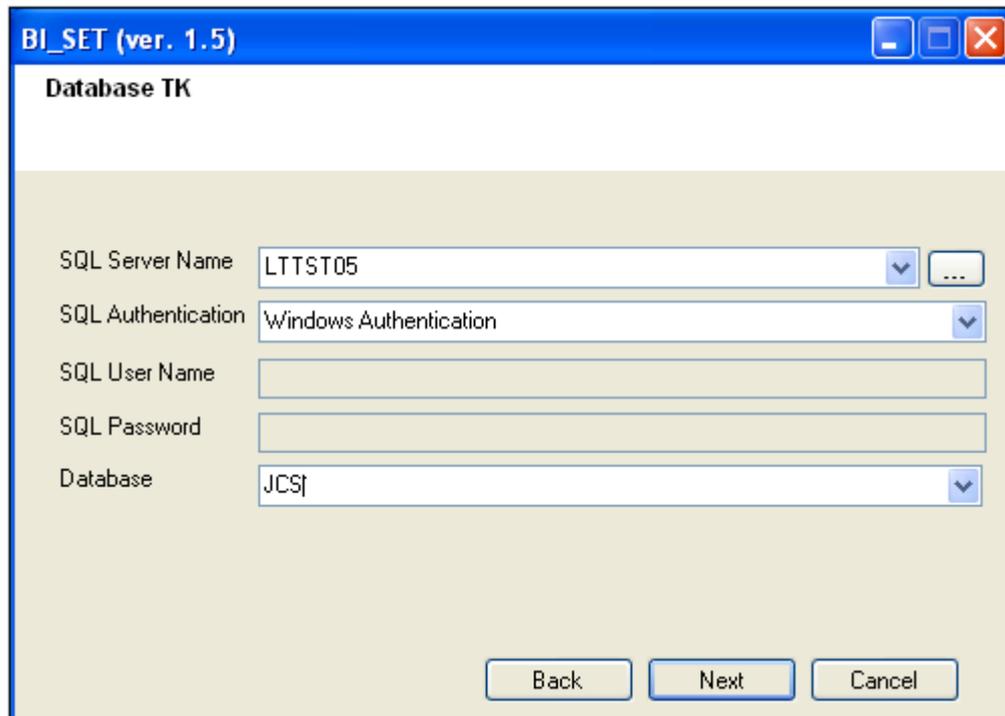


8. In the **ETL Installation screen**, select the path of the directory where the BI ETL files will be installed, and click **Next**.



9. In the **Database TK** screen, do the following:
  - a. In **SQL Server Name**, select the correct SQL server
  - b. In **Database**, select a TKSQL database to run this installation on
  - c. Click **Next**.

**NOTE:** The information displayed is for example purposes.



10. In the **Database DWH**, in **SQL Server Name**, select the SQL server, and click **Next**.

11. In the **Databases Intellisys** screen, in **SQL Server Name**, select the SQL server, and click **Next**.

12. In the **Databases OLAP** screen, select the OLAP server name, and click **Next**.

**BI\_SET (ver. 1.5)**

**Database OLAP**

Database does NOT exist

OLAP Server Name: NETA-L\SQL2008

OLAP Authentication: Windows Authentication

Database: TimeKeeperBI\_UDM

Back Next Cancel

13. In the **IIS Server Installation** screen, select **Selected User**, enter an administrator user name and password, and click **Next** (leave all other settings as is).

**NOTE:** The information displayed is for example purposes.

**BI\_SET (ver. 1.5)**

**IIS Server Installation**

New Installation  Existing Installation

Select mode: Virtual Directory in existing Web Site

Web Site: Default Web Site

Virtual Directory Name: TIMEKEEPER\_ANALYTIC Path: c:\TK\_BI\Intellisys

Application Pool Application Name: TIMEKEEPER\_ANALYTICS

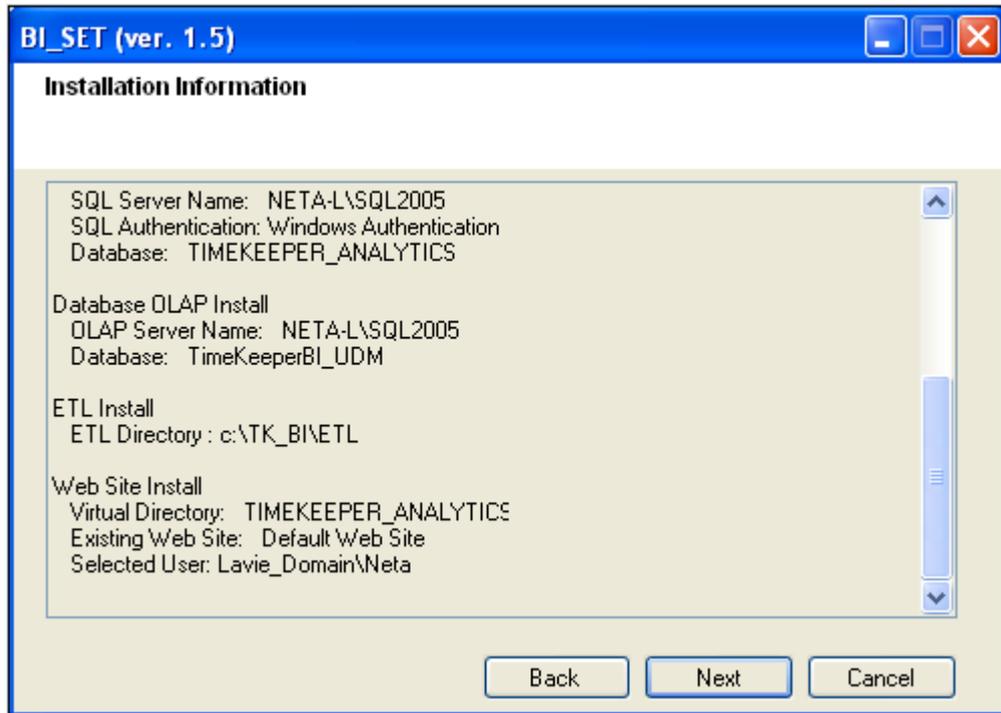
Default (IUSR\_Machine)  Selected User

User Name: Lavie\_Domain\Neta

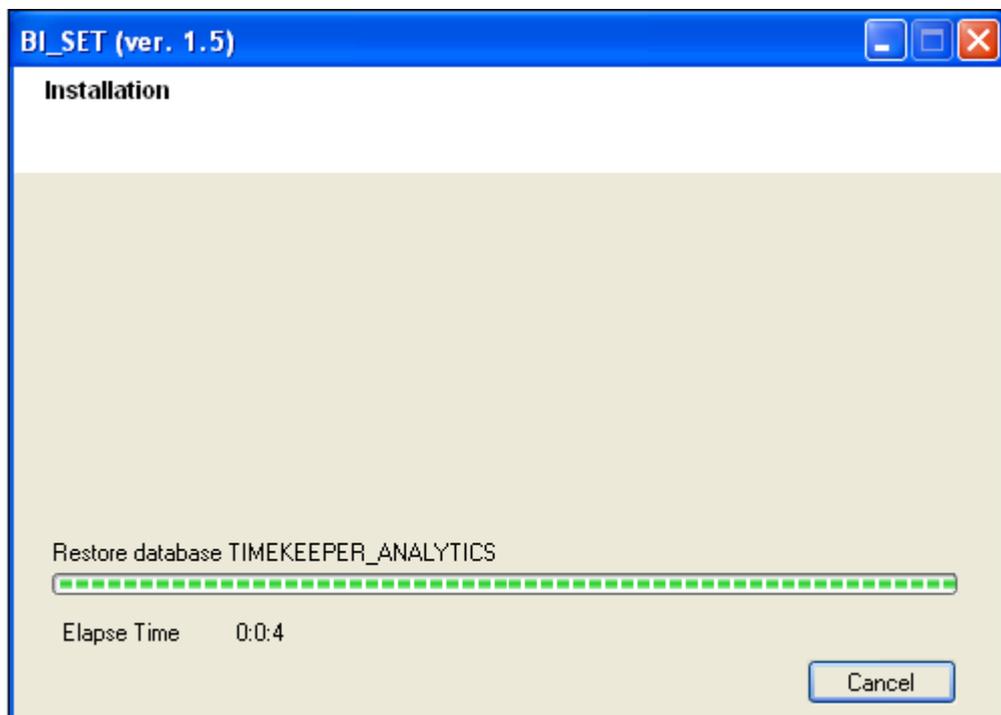
Password: [masked]

Back Next Cancel

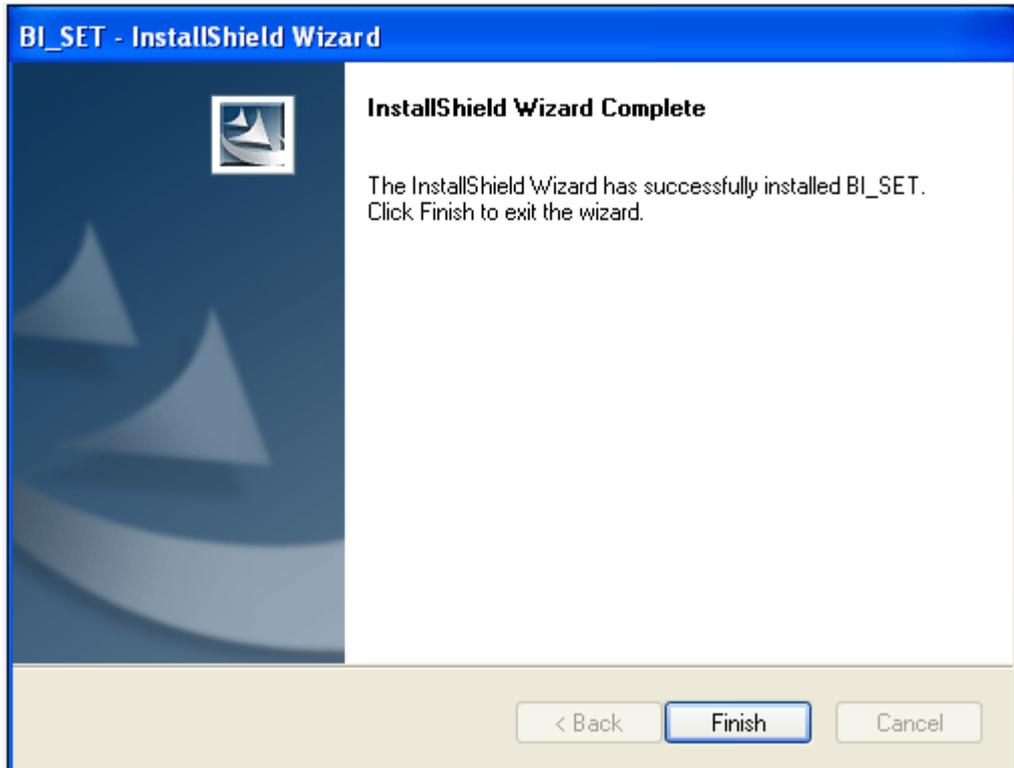
14. In the **Installation Information** screen, click **Next**.



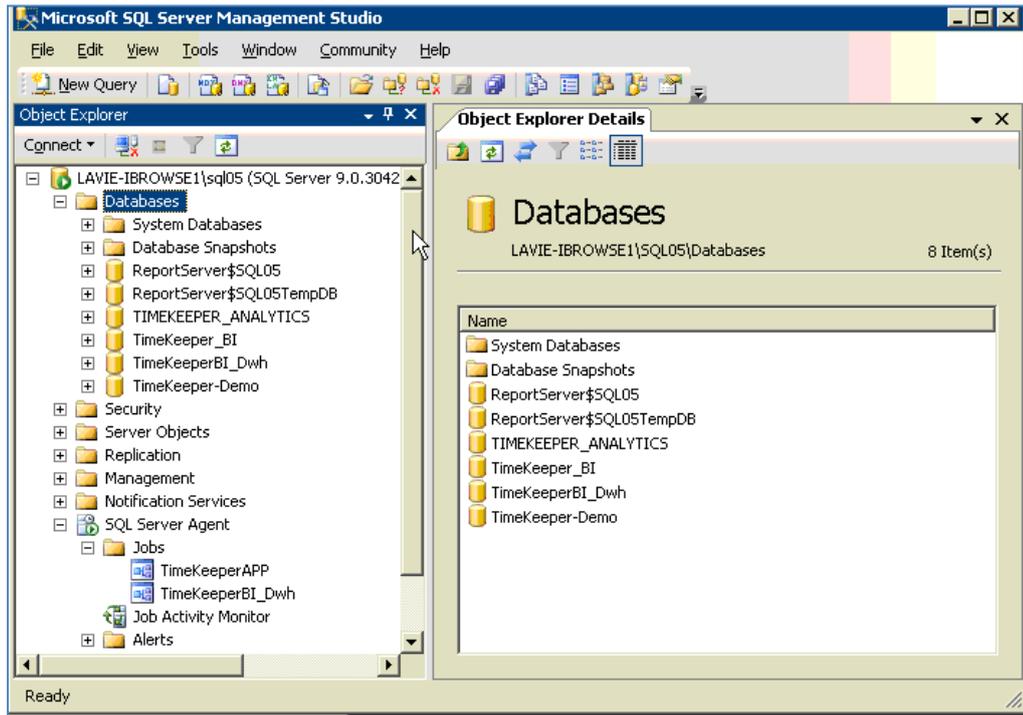
15. When the **Installation** screen is displayed, wait a few moments while all the components are being installed.



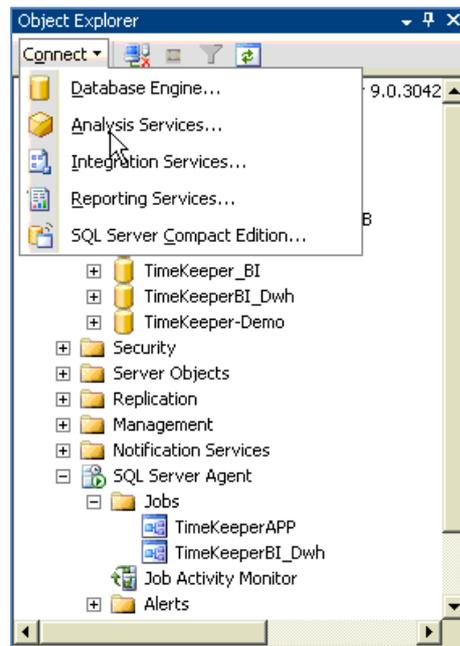
16. When done, the **Installation Wizard Complete** screen is displayed. Click **Finish**.



17. Verify that were **TimeKeeperBI\_Dwh** and **TimeKeeper\_analytics** databases and the **Timekeeperapps** and **Timekeeperbi\_dwh** jobs were created.
  - a. Open Microsoft SQL Server Management Studio.
  - b. In the **Object Explorer** tree on the left, select **<BI SQL Server\_Name>** → **Databases**. The server name refers to your SQL server where the databases are installed (in this example, the server name is **LAVIE-IBROWSE1\sql05**).
  - c. Verify the installed databases in the list.



- d. In the same directory, select **SQL Server Agent > Jobs**, and verify the installed jobs.
18. To verify that the cube was created, do as follows:
- a. Connect to **Analysis Services** from the **Object Explorer** tree by clicking the **Connect** button.
  - b. Select **Analysis Services** from the list.



- c. In the **Object Explorer** tree, select **<BI SQL Server\_Name> → Databases**.  
The server name refers to your SQL server where the databases are installed (in this example, the server name is **LAVIE-IBROWSE1\sql05**).
- d. In the databases folder, verify that **TimeKeeperBI\_UDM** appears.

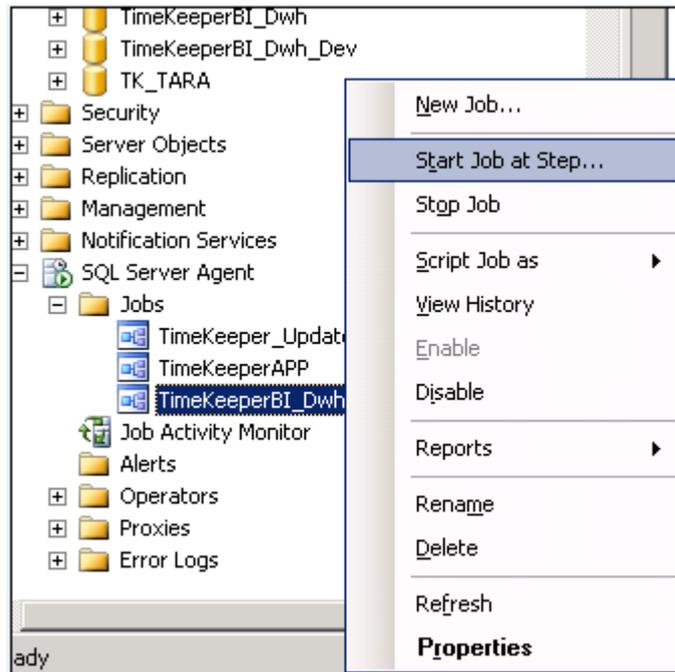


19. Run jobs according to the following order:

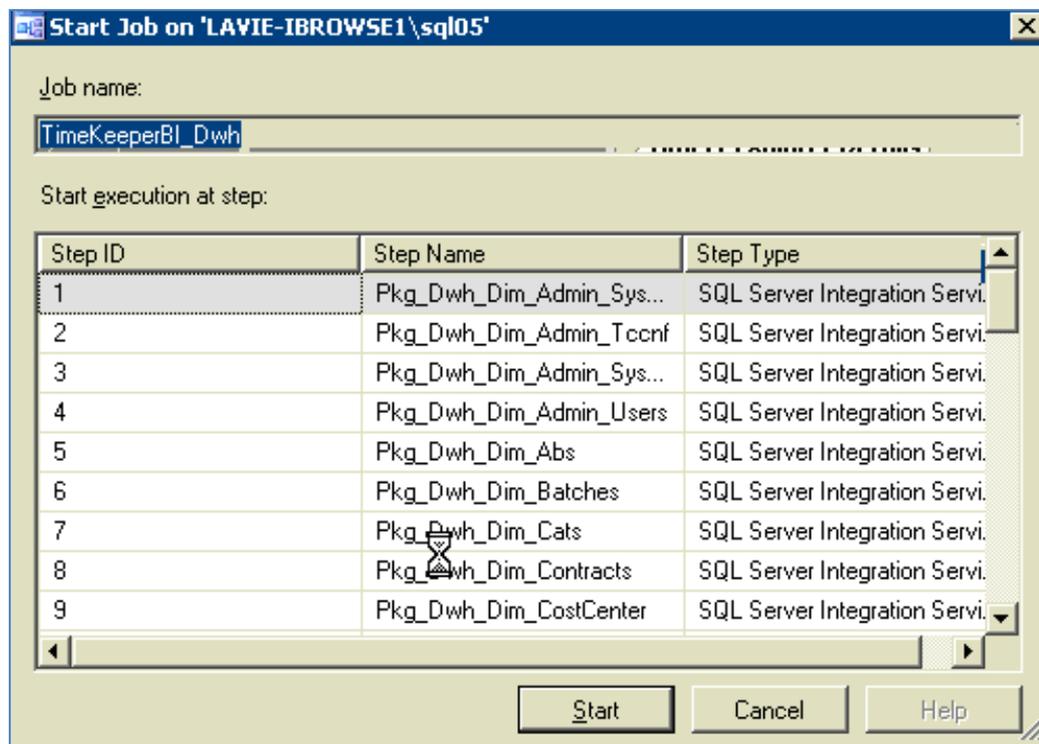
- TimeKeeperBI\_DWH
- TimeKeeperapps
- TimeKeeper\_Update\_New\_Users. **NOTE:** If you have changed the password of an existing TKSQ user, or if you added a new TKSQ user, run this job manually instead of waiting for the nightly run process. The details will be updated automatically in the TimeKeeper Analytics system.

To run these jobs, do as follows:

- a. Open Microsoft SQL Server Management Studio.
- b. In the **Object Explorer** tree on the left, select **SQL Server Agent > Jobs**.
- c. Right-click **TimeKeeperBI\_DWH**, and select **Start Job at Step...**The **Start Job** screen appears.



- d. In the **Job Name** field, ensure that **TimeKeeperBI\_DWH** appears, and click **Start**.



20. Right-click the job and click **View History**. If the  sign is visible, the job is running. The  and  icons designate problems or problem-free usage.

Log File Viewer - LAVIE-IBROWSE1\sql05

Database Mail  
 Job History  
      TimeKeeperAPP  
      TimeKeeperBI\_Dwh  
 SQL Agent

Status

Last Refresh:  
28/04/2009 09:33:53

Filter: None  
[View filter settings](#)

Progress

Done (1 records).

Load Log   Export   Refresh   Filter ...   Search ...   Delete ...   Help

Log file summary: No filter applied

Date	Step ID	Server	Job Name	Step Name	Notifications	Message
28/04/2009 09:33:53			TimeKeeperBI_Dwh			In progres
✓ 28/04/2009 09:33:22	13	LAVI...	TimeKeeperBI_Dwh	Pkg_Dw...		Execute...
✓ 28/04/2009 09:33:20	12	LAVI...	TimeKeeperBI_Dwh	Pkg_Dw...		Execute...
✓ 28/04/2009 09:33:18	11	LAVI...	TimeKeeperBI_Dwh	Pkg_Dw...		Execute...
✓ 28/04/2009 09:33:17	10	LAVI...	TimeKeeperBI_Dwh	Pkg_Dw...		Execute...
✓ 28/04/2009 09:33:15	9	LAVI...	TimeKeeperBI_Dwh	Pkg_Dw...		Execute...
✓ 28/04/2009 09:33:12	8	LAVI...	TimeKeeperBI_Dwh	Pkg_Dw...		Execute...
✓ 28/04/2009 09:33:09	7	LAVI...	TimeKeeperBI_Dwh	Pkg_Dw...		Execute...
✓ 28/04/2009 09:33:05	6	LAVI...	TimeKeeperBI_Dwh	Pkg_Dw...		Execute...
✓ 28/04/2009 09:33:02	5	LAVI...	TimeKeeperBI_Dwh	Pkg_Dw...		Execute...
✓ 28/04/2009 09:33:00	4	LAVI...	TimeKeeperBI_Dwh	Pkg_Dw...		Execute...
✓ 28/04/2009 09:32:53	3	LAVI...	TimeKeeperBI_Dwh	Pkg_Dw...		Execute...
✓ 28/04/2009 09:32:51	2	LAVI...	TimeKeeperBI_Dwh	Pkg_Dw...		Execute...
✓ 28/04/2009 09:32:38	1	LAVI...	TimeKeeperBI_Dwh	Pkg_Dw...		Execute...

Selected row details:

Date 28/04/2009 09:33:53  
Log Job History (TimeKeeperBI\_Dwh)

Job Name TimeKeeperBI\_Dwh  
Duration 00:01:15.7930000

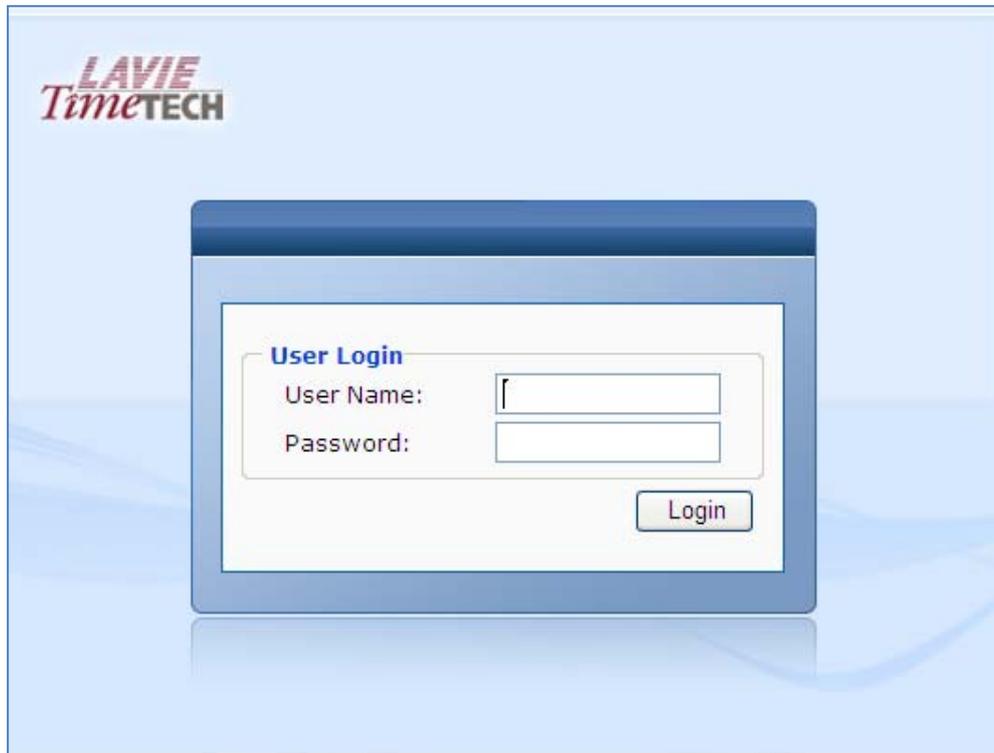
## Logging In to TimeKeeper Analytics for the First Time

1. After installation, ensure you have the URL for **TimeKeeper Analytics** as installed on your server. This should be as follows:

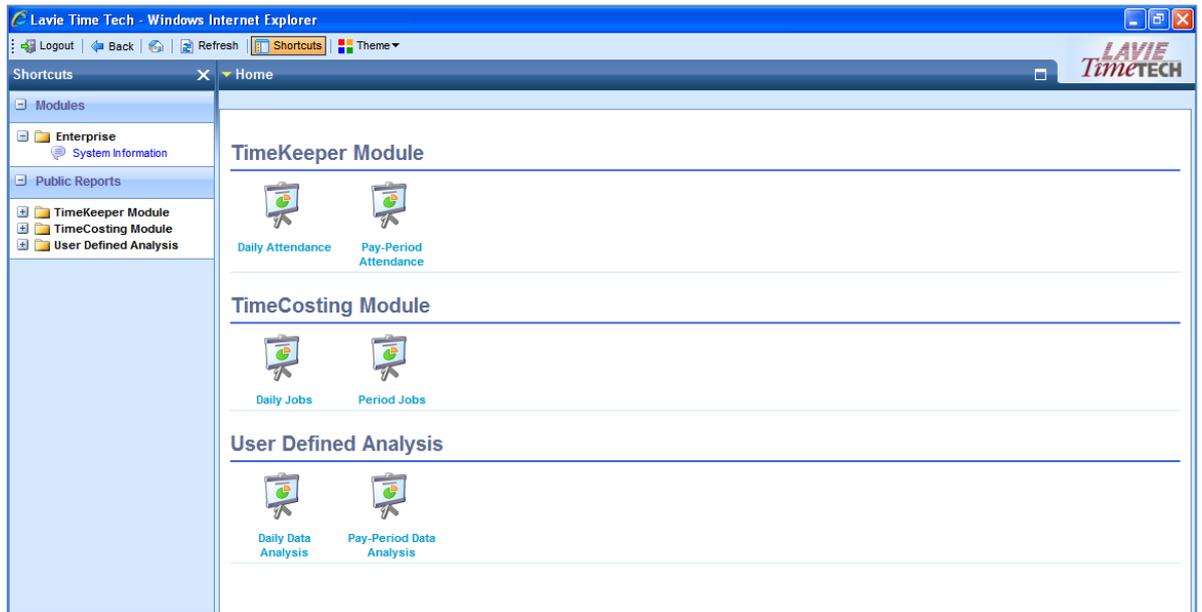
**http://{the server where TimeKeeper Analytics is installed}/timekeeper\_analytics/**

Add this link to the "**Favorites**" list in your web browser.

2. In your web browser's address bar, enter **TimeKeeper Analytics'** URL, and press **Enter** on your keyboard. The login screen appears.



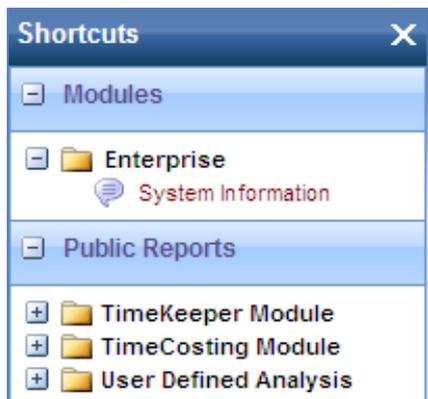
3. Enter your user name and password, and click **Login**. The main screen appears.



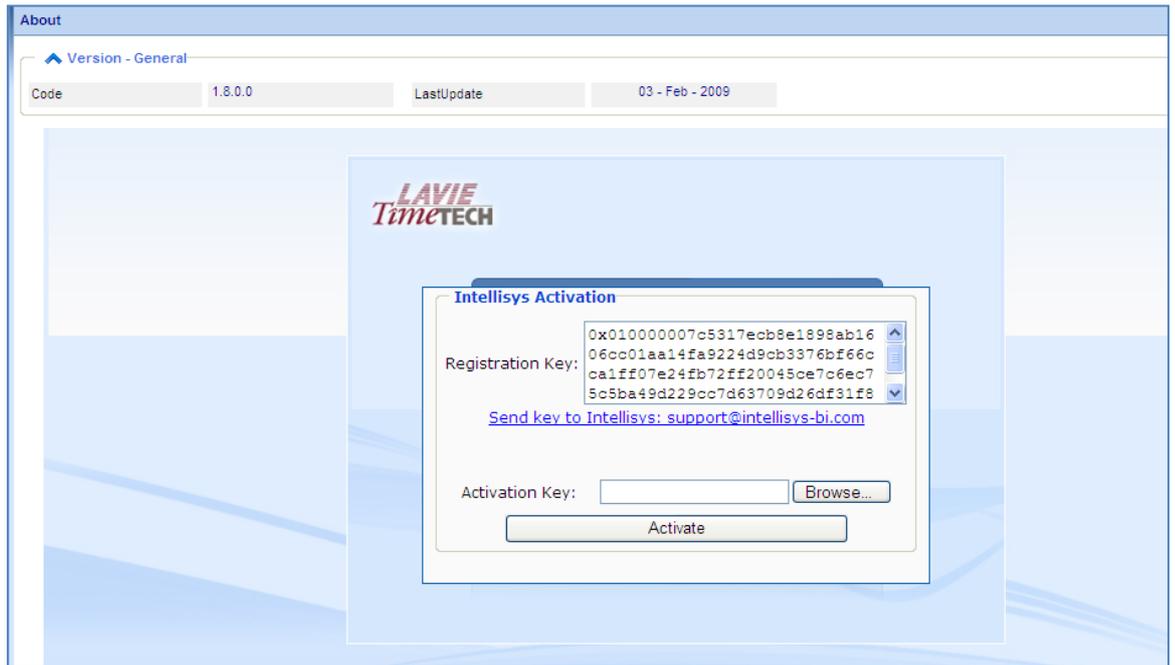
## Viewing System Information

To note your version of **TimeKeeper Analytics** for future reference, do as follows:

1. Log in to **TimeKeeper Analytics**. The main screen appears.
2. In the **Shortcuts** pane, on the left side of the screen, expand the plus sign to the left of the word **Modules**. The **Modules** hierarchy appears.
3. Expand the plus sign to the left of the **Enterprise** folder. The **Enterprise** hierarchy appears.



4. Click **System Information**. The **About** screen appears.



The **Version General** area displays the code and last update. For any questions, consult your Lavie TimeTECH dealer.

## Activating TimeKeeper Analytics

After installation, **TimeKeeper Analytics** will work for several days, and then must be officially activated via an activation key in order to keep working.

To receive an activation key, do as follows:

1. Log in to TimeKeeper Analytics and access the **About** screen, as described in [Viewing System Information](#).
2. From the **Intellisys Activation** area, click the link. A registration email addressed to Lavie TimeTech containing the registration key in the email body opens in your email application. If it does *not* contain the key, simply copy and paste it from the screen.
3. Click **Send**. Within a number of days, you will receive an activation key from in the form of a .lic file. Save to your computer.
4. From the **Activation Key** field, click **Browse** to find the activation key on your computer.
5. Click **Activate**. A confirmation message appears. You are ready to begin working with **TimeKeeper Analytics**.

**NOTE:** If any problems or errors occur, refer to your **TimeKeeper Analytics** dealer.

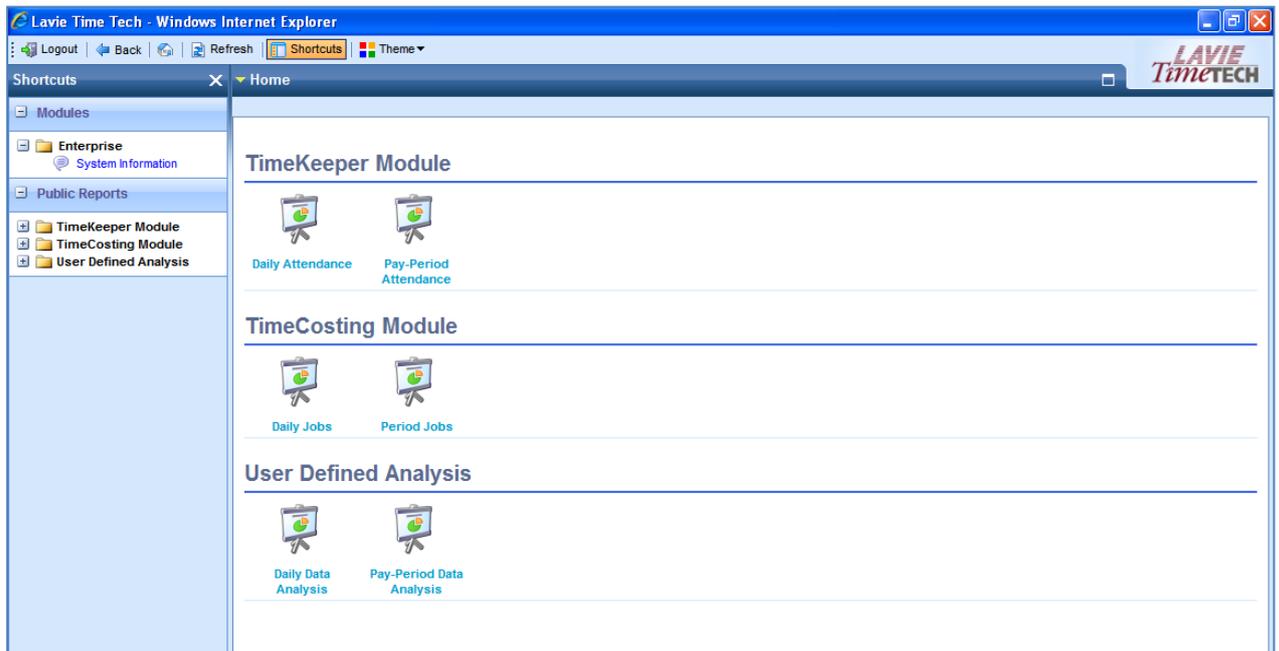
## Understanding the Main Interface

### Main Screen

Use the main screen to select your desired work modules.

To access the main screen, do as follows:

1. Log in to **TimeKeeper Analytics** using your user name and password. The login screen appears.
2. Enter your user name and password, and click **Login**. The main screen appears.

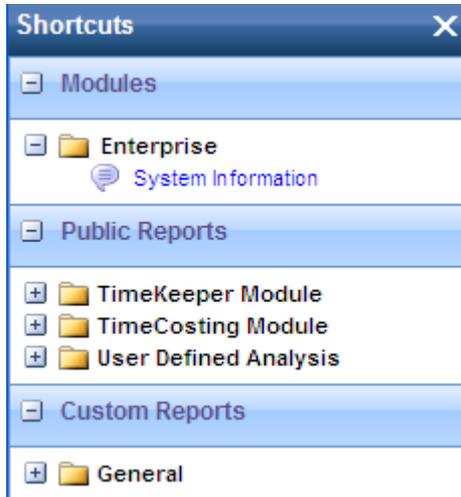


### Toolbar and Navigation Conventions

Button	Name	Description
	<b>Logout</b>	Log off from <b>TimeKeeper Analytics</b>
	<b>Back</b>	Takes you to the previous screen, only if you have gone forward at least one screen in that workflow
	<b>Home</b>	Transfers you to the default main screen
	<b>Refresh</b>	Enables you to update the screen with any newly entered data
	<b>Shortcuts</b>	This button is selected by default and enables you to view the <b>Shortcut</b> pane on the left side of the main screen. To close the <b>Shortcut</b> pane, click

## Shortcut Pane

The **Shortcut** pane is divided into three parts and enables you to quickly view system information and navigate between modules. Expand the plus signs to view the subentries.



Name	Description
<b>Modules</b>	Enables you to activate and view information regarding your current version of <b>TimeKeeper Analytics</b> .
<b>Public Reports</b>	Provides quick access and navigation between the different modules. Alternatively, for quick navigation purposes, use the <b>Home</b> pane.
<b>Custom Reports</b>	Enables you to save, organize, and view reports (screens with generated graphs/charts). See <a href="#">Custom Reports</a> .  <b>NOTE:</b> The <b>Custom Reports</b> heading shown here in this screenshot is purely for illustrative purposes. This heading appears only after a report is defined.

## Home Pane

The **Home** pane enables you to select the relevant modules for analysis.

The screenshot displays the Home Pane interface with a dark blue header containing a dropdown menu set to 'Home'. The main content area is divided into three sections, each separated by a horizontal line. Each section contains two icons of a presentation board with a pie chart, representing different analysis options.

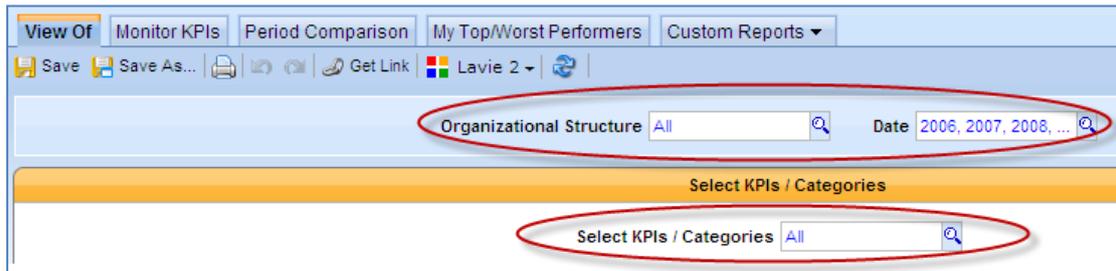
- TimeKeeper Module**
  - Daily Attendance
  - Pay-Period Attendance
- TimeCosting Module**
  - Daily Jobs
  - Period Jobs
- User Defined Analysis**
  - Daily Data Analysis
  - Pay-Period Data Analysis

<b>TimeKeeper Module</b>		Analyzes and displays time and attendance data accumulated via TimeKeeper.
	<b>Daily Attendance</b>	Analyzes time and attendance data per daily records.
	<b>Pay-Period Attendance</b>	Analyzes time and attendance data per pay-period records (i.e. based on the pay-periods that are set in TimeKeeper. This can be either weekly, bi-weekly, semi-monthly or monthly)
<b>TimeCosting Module</b>		Analyzes and displays job allocation and labor distribution data accumulated via TimeCosting.
	<b>Daily Jobs</b>	Analyzes job allocation and labor distribution data per daily records.
	<b>Period Jobs</b>	Analyzes job allocation and labor distribution data per pay-period records (i.e. based on the pay-periods that are set in TimeKeeper. This can be either weekly, bi-weekly, semi-monthly or monthly)
<b>User-Defined Analysis</b>		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 layout.
	<b>Daily Data Analysis</b>	Create custom reports for the daily data
	<b>Pay-Period Analysis</b>	Create custom reports for the and pay period cycles

## Dimensions Selection

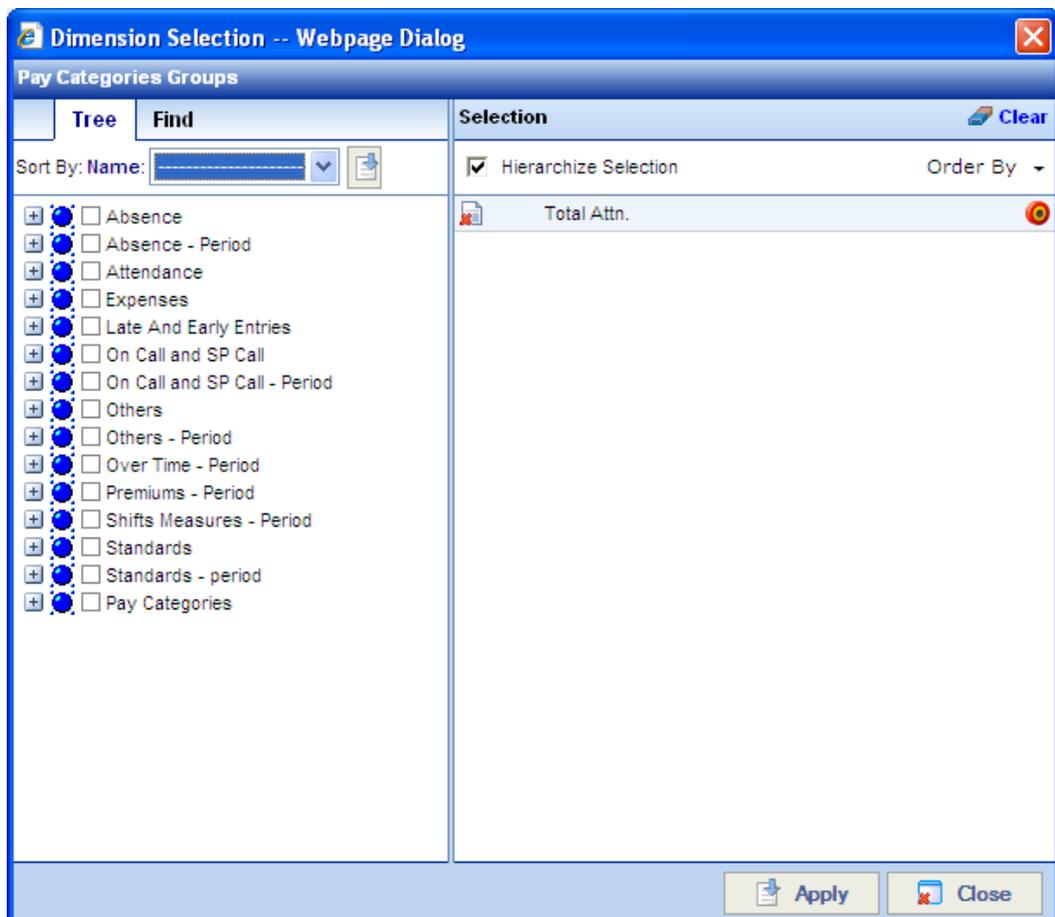
Selecting criteria for generating and filtering analysis graphs is done via the **Dimensions Selection** screen, enabling easy, intuitive usage. All available selections are in accordance with the category.

The **Dimension Selection** screen is accessed by clicking the **Find**  icon next to any KPI or selection criteria, for example:

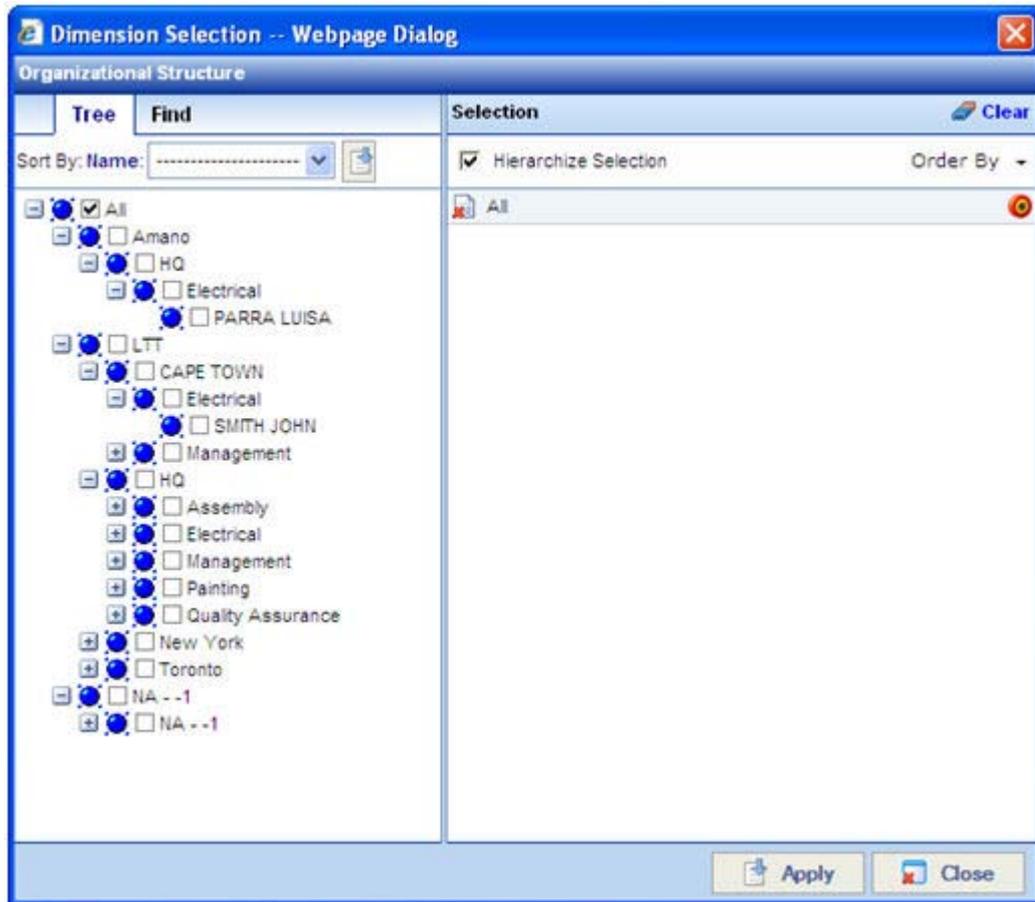


To use the Dimension Selection screens:

1. From the **Organizational Structure**, **Date**, or **Select KPIs/Categories** list boxes, the **Find**  button. The relevant Dimension Selection screen appears (this example uses **Organizational Structure**).



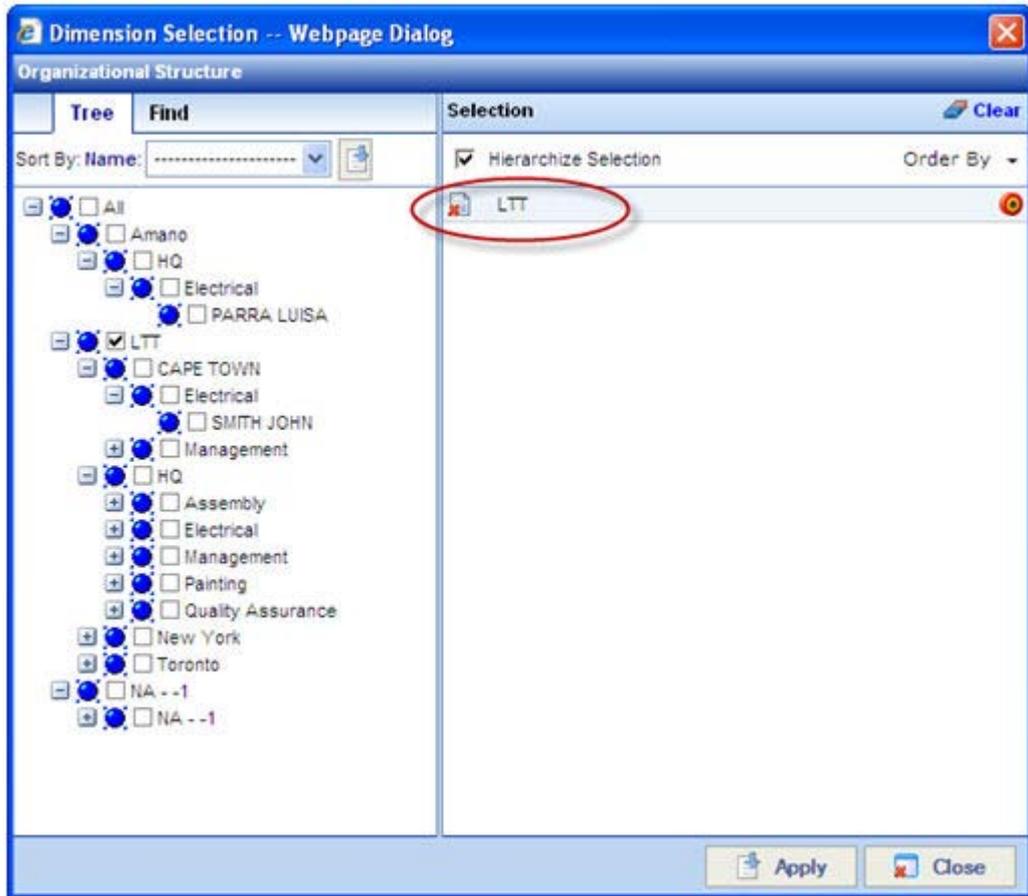
2. In the **Tree** pane on the left, click the plus sign next to **All** to expand the hierarchy, and drill down further (to site, department, or employee).



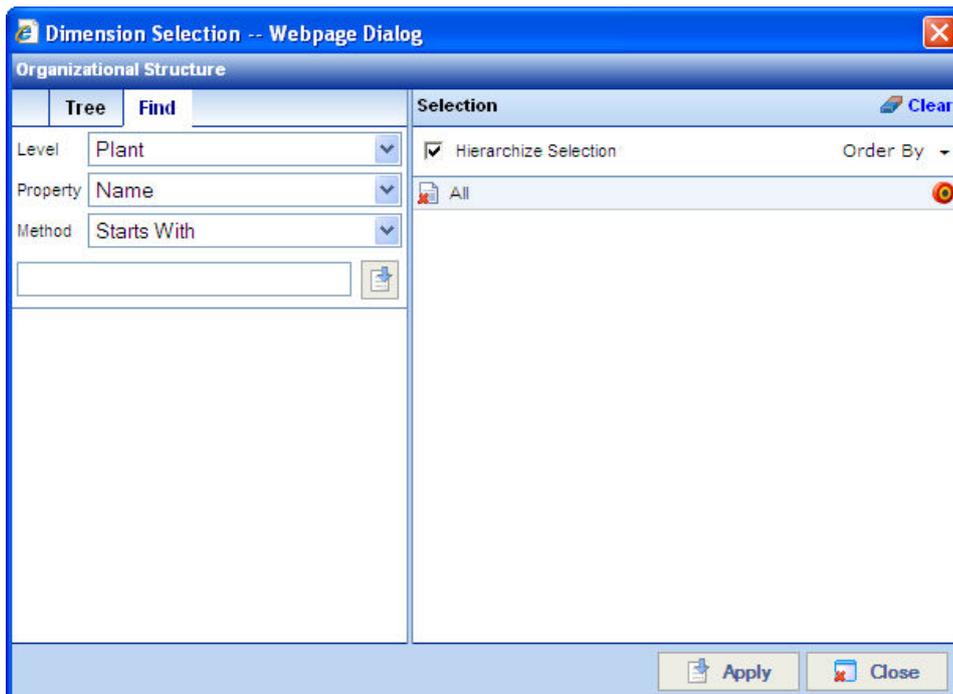
3. Select the entity that you want to measure, or the filtering criteria.

**NOTE:** The **All** selection refers to all defined hierarchies and selections in the Tree pane. If you only want a specific selection/s, ensure that you clear the **All** check box.

After selection (and clearing **All**), the selection's name appears in the **Selection** pane on the right, for example:

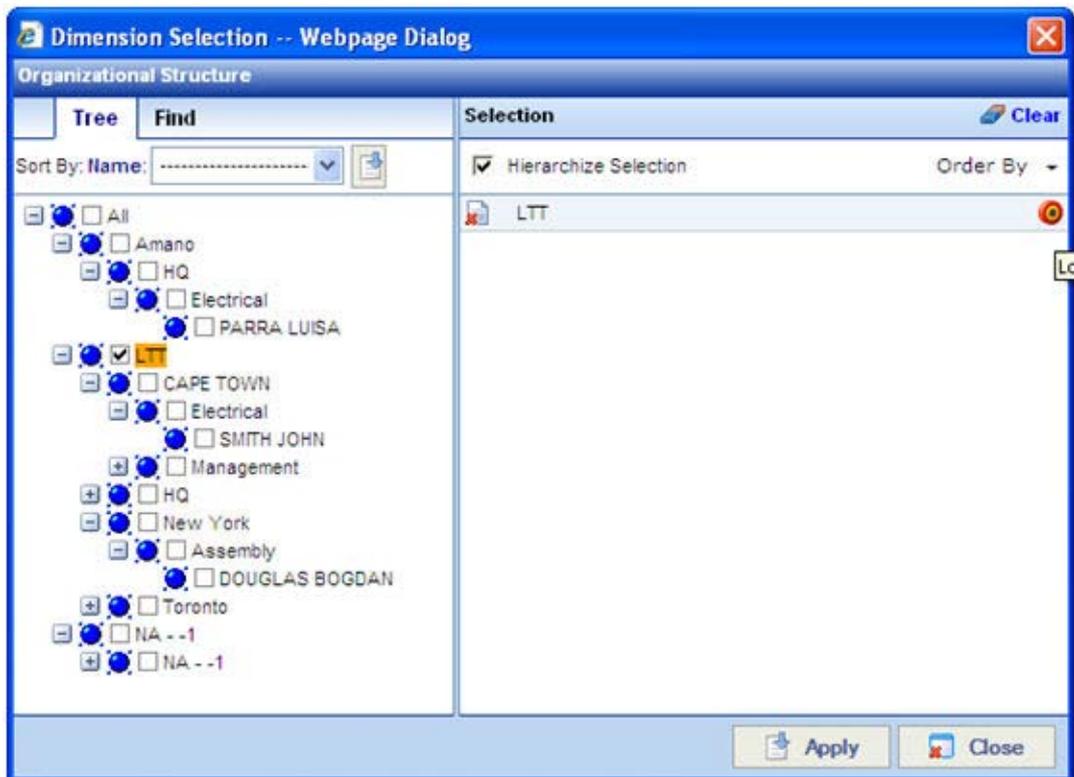


4. To clear any unnecessary selections from the **Selection** pane, click the **Clear** button  on that selection's row.
5. For a hard-to-find name, click **Find** at the top, use the advanced search functions:



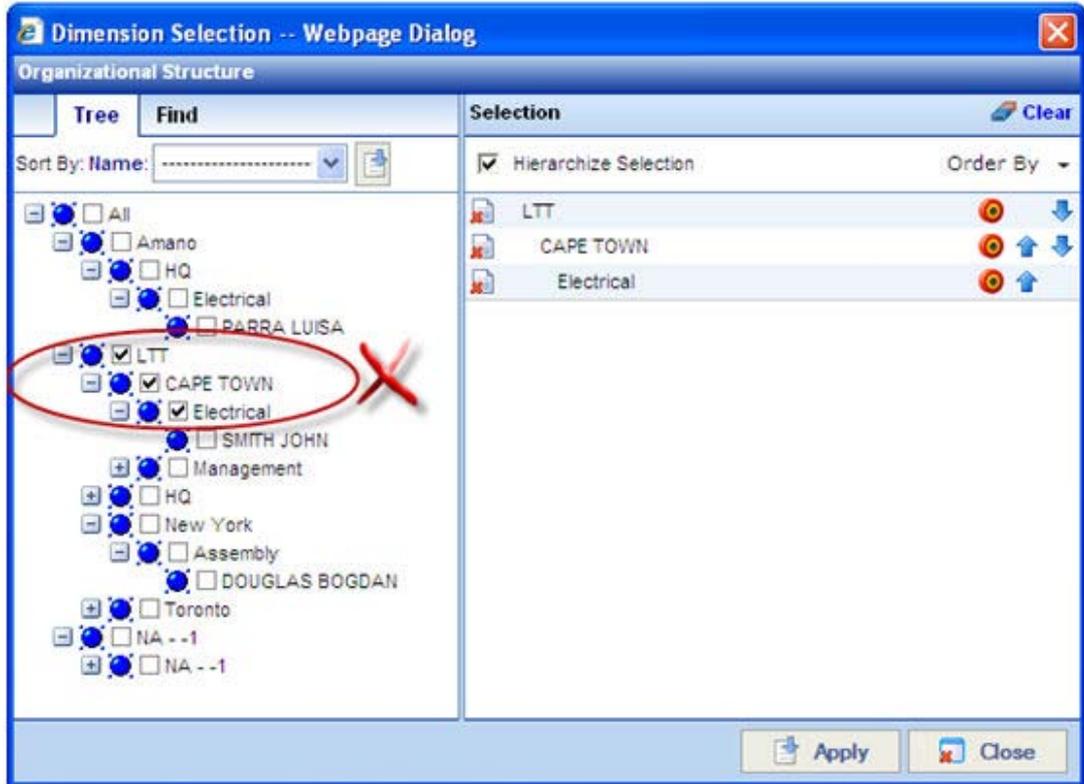
- a. In **Level**, select **Plant, Site, Department, or Employee**.

- b. In **Property**, select **Name**, and select the correct method in **Method**.
  - c. In **Method**, select **Equal**, **Starts With**, **Ends With**, or **Contains**.
  - d. In the entry box under **Method**, enter the selected method, such as the first/last letter, etc.
  - e. Click the  button. The selection/s appears in the **Tree** pane.
6. To clear all selections from the **Selection** pane (on the right), click the **Clear** button .
  7. 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.

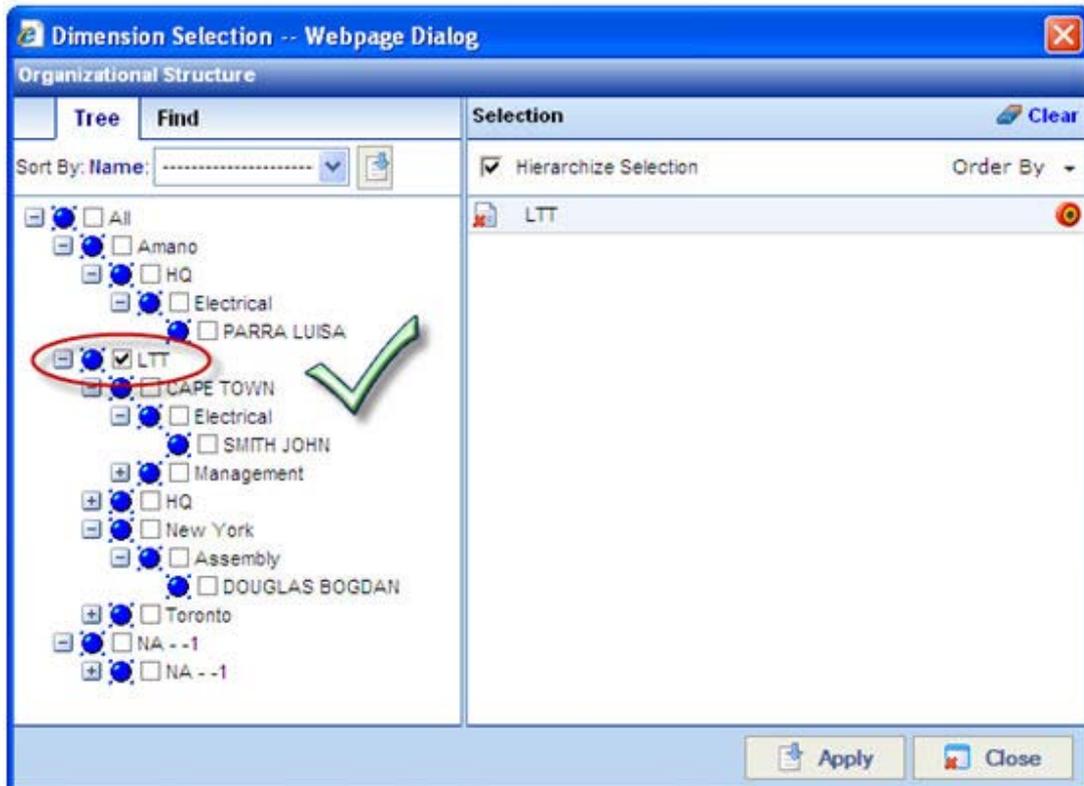


**IMPORTANT:** Regardless of the Dimension Selection screen that you are working in, when making selections, do not make any "double selections" by selecting an entry in the hierarchy and a sub-entry of that unit. ***This will distort the results!*** See the following for an example:

Incorrect...



Correct!

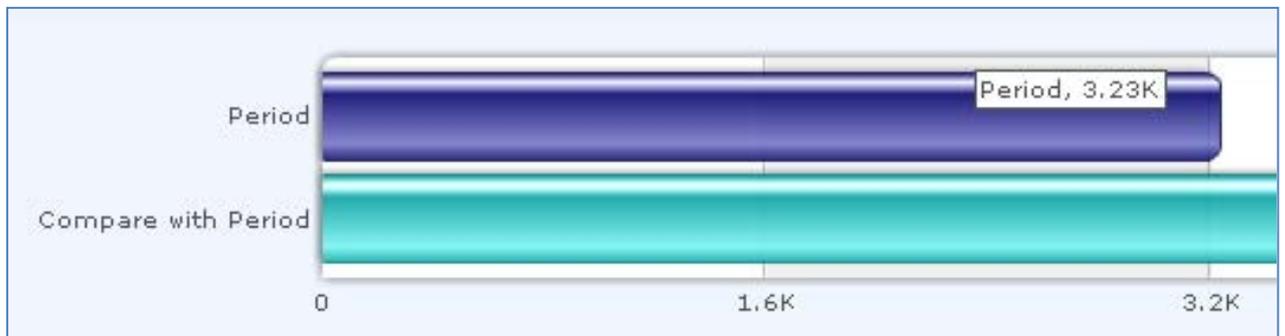
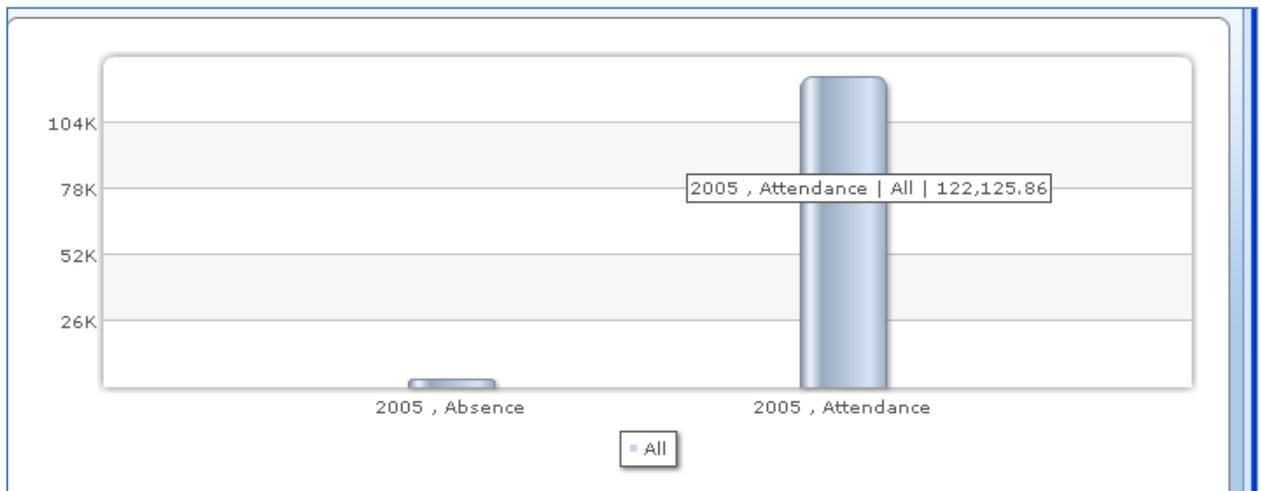


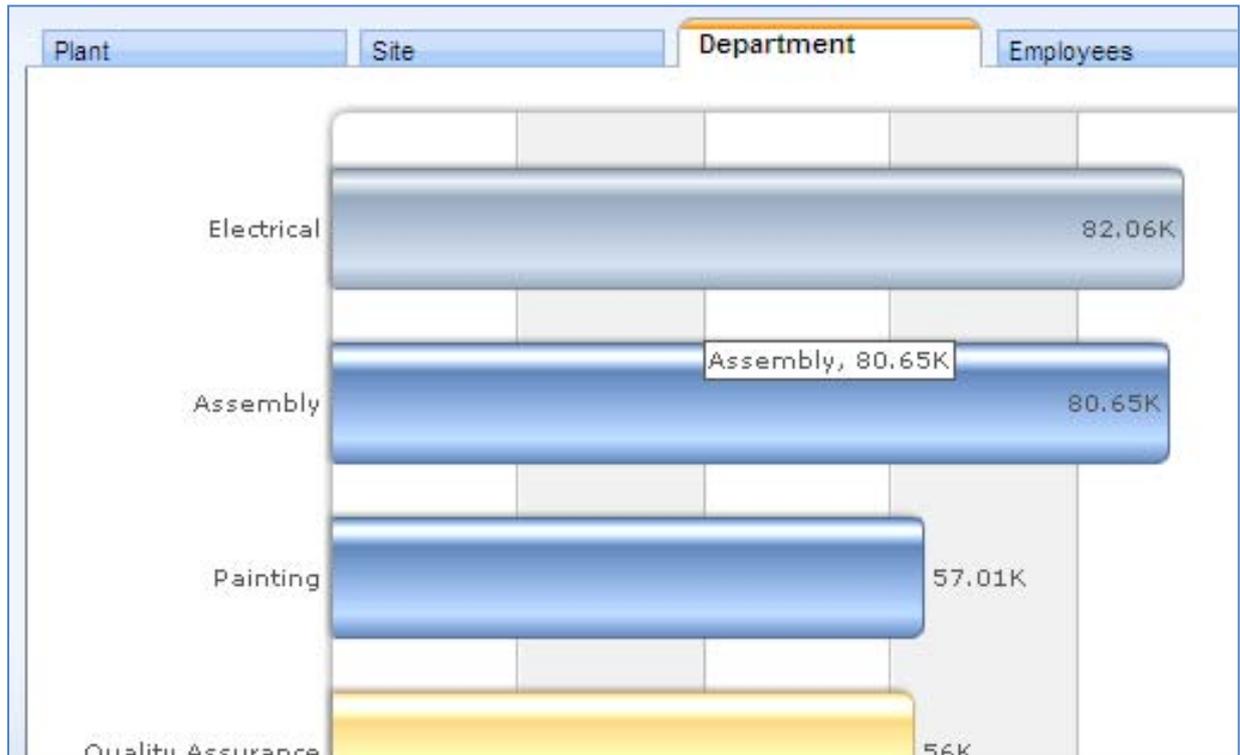
8. Repeat the procedure for **Dates** and **Select KPIs/Categories**, if needed - these work the same way as **Organizational Structure**.
9. Click **Apply** when done. To exit without saving, click **Close**.

### Tooltips

Tooltips are used throughout the application in order to provide detailed information and easy, quick identification of the particular graphic component.

See the following examples:



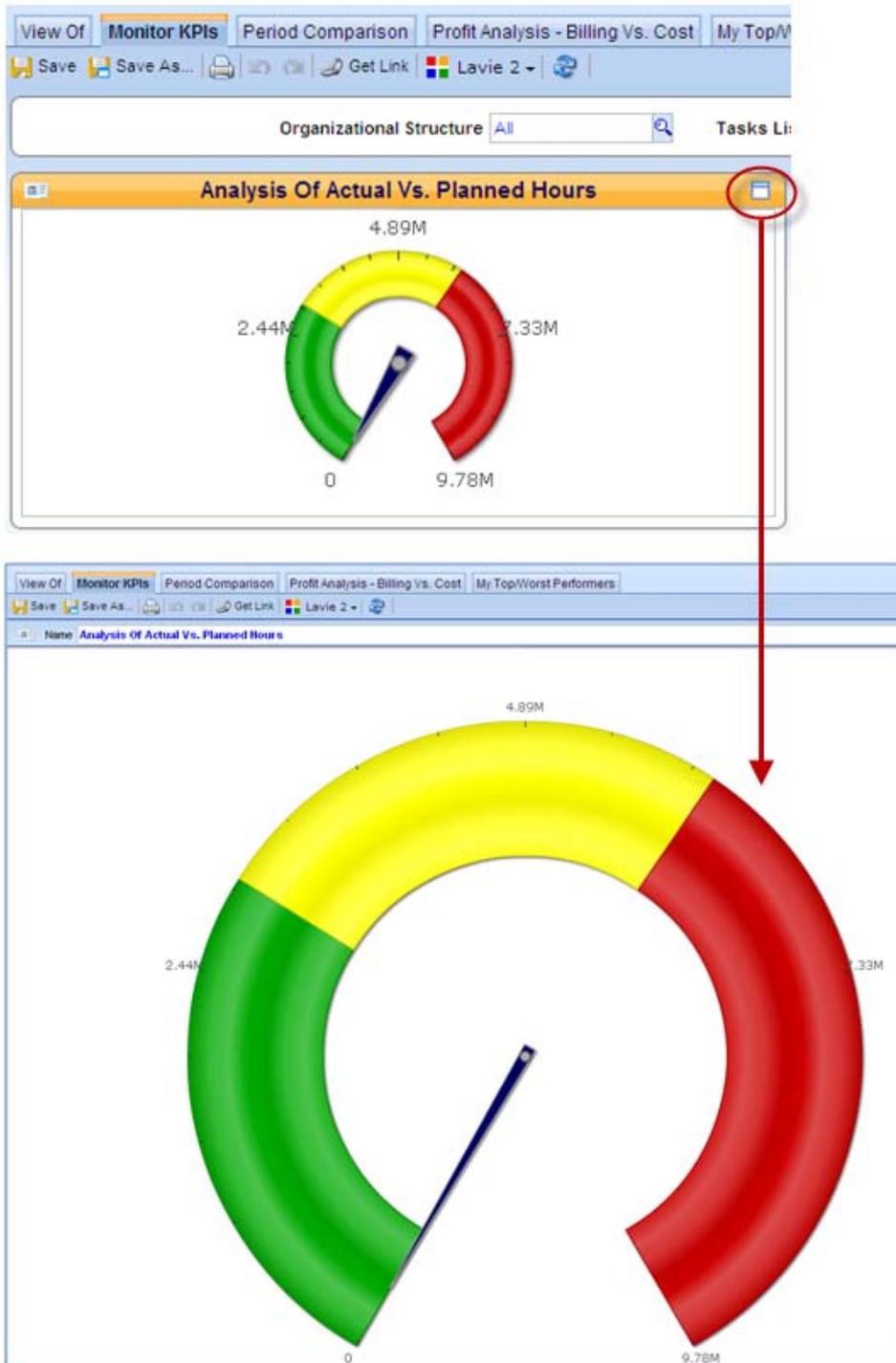


Additionally, tooltips are useful for displaying hidden information, such as selections in an entry box where only a few are displayed:



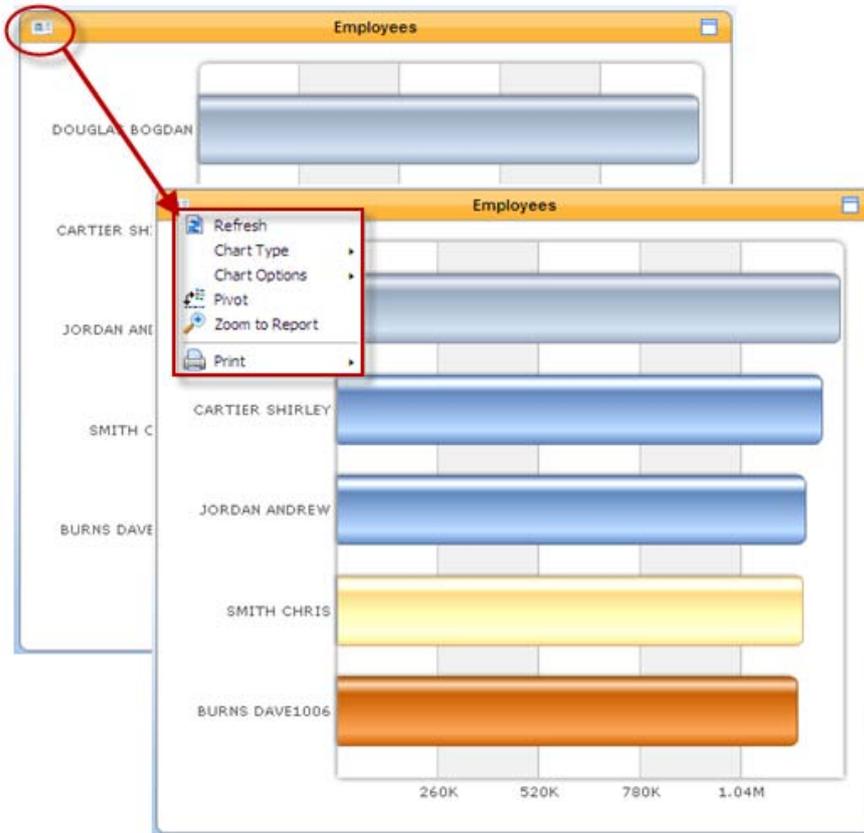
### Additional Chart Options

- To view a full screen representation of a report, click the  icon. To return the screen to its original size, click .



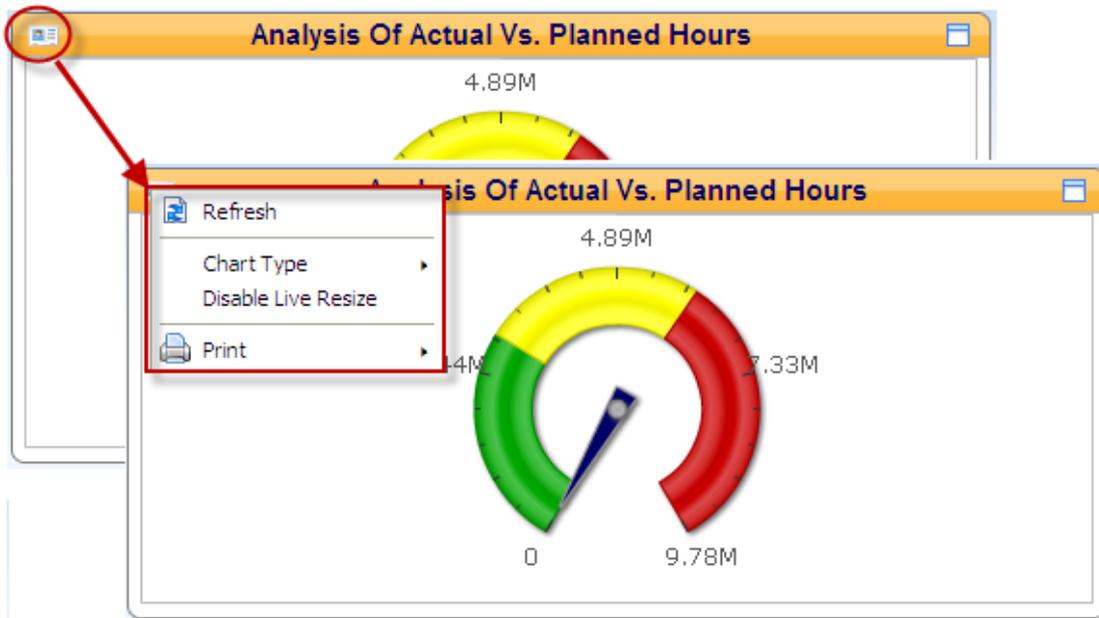
- In many places in the application, **TimeKeeper Analytics** enables you to change the current screen graph, chart, and summary display to that of another of your choice. Simply click the  icon, and select from the menu.

This menu displays additional options, as detailed below:



Button	Name	Description
	<b>Refresh</b>	Refreshes the contents of the current page
	<b>Chart Type</b>	Enables you to select a different chart type, such as bar, column, etc. See <a href="#">Chart Types and Options</a> .
	<b>Chart Options</b>	Enables you to select a different chart type. See <a href="#">Chart Types and Options</a> .
	<b>Pivot</b>	Shifts the bar graph's axes and aggregates the displayed data
	<b>Zoom to Report</b>	Enables you to view and manipulate the data in pivot table form. See <a href="#">Creating Custom-Designed Analysis Screens</a>
	<b>Print</b>	Enables you to print the contents of the current screen or export to an HTML page

- The **TimeCosting** module offers the following options:

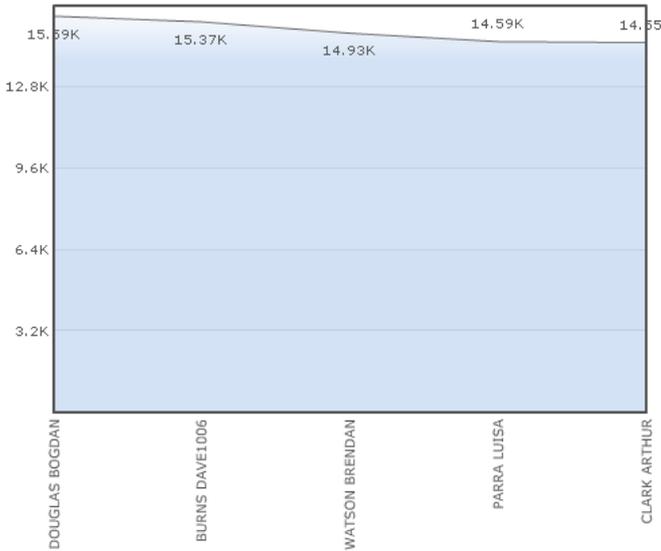


Button	Name	Description
	<b>Refresh</b>	Refreshes the contents of the current screen
	<b>Chart Type</b>	Enables you to select a different chart type, such as bar, column, etc. See <a href="#">Chart Types and Options</a> .
	<b>Disable Live Resize</b>	Disables the full screen representation functionality.
	<b>Print</b>	Enables you to print the contents of the current screen or export to an .HTML page

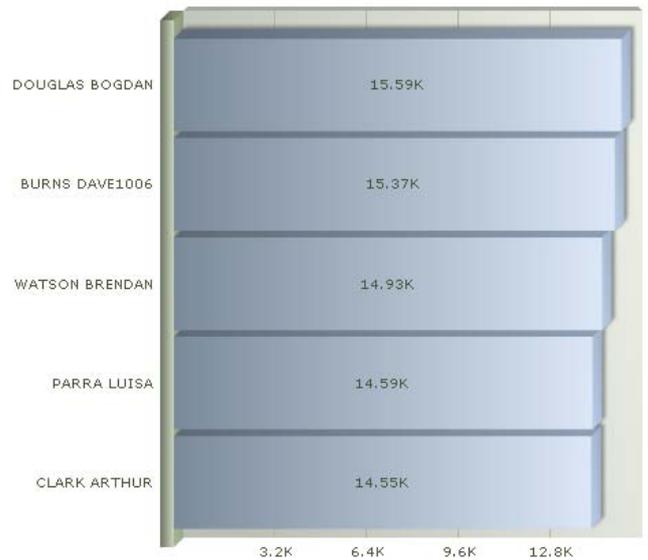
**Chart Types and Options**

The following displays a brief sample of some of the chart types and chart options that are available. It is recommended to independently explore the selections and find the ones that are suitable for you.

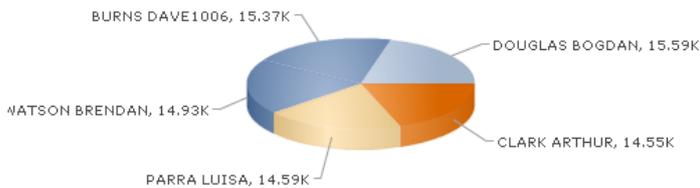
**Area**



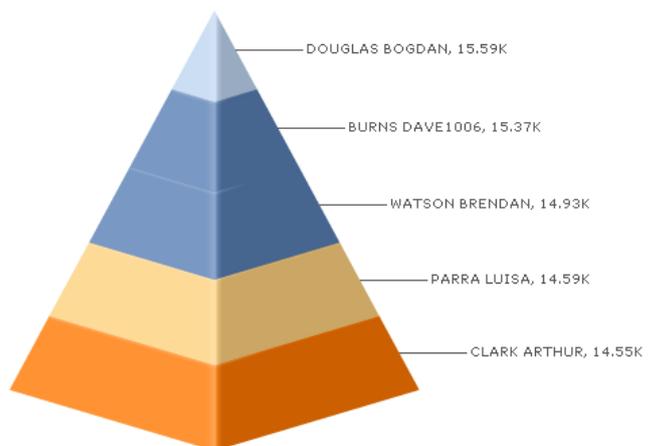
**Stacked Bar (3D)**



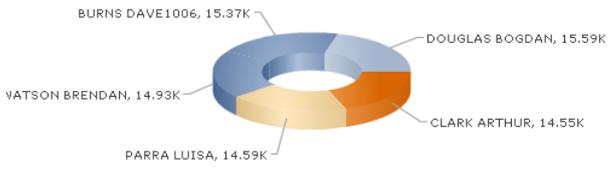
**Pie Chart (3D)**



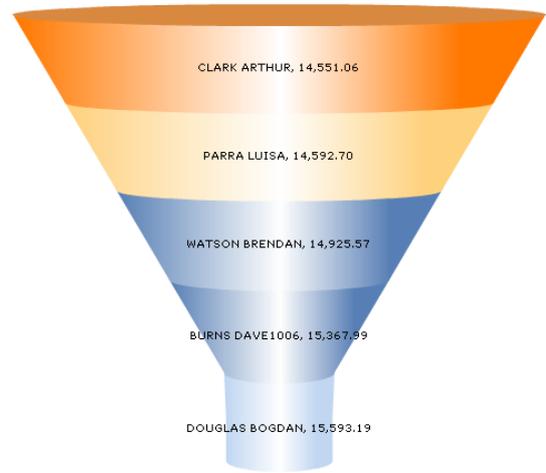
**Pyramid Chart (2D)**



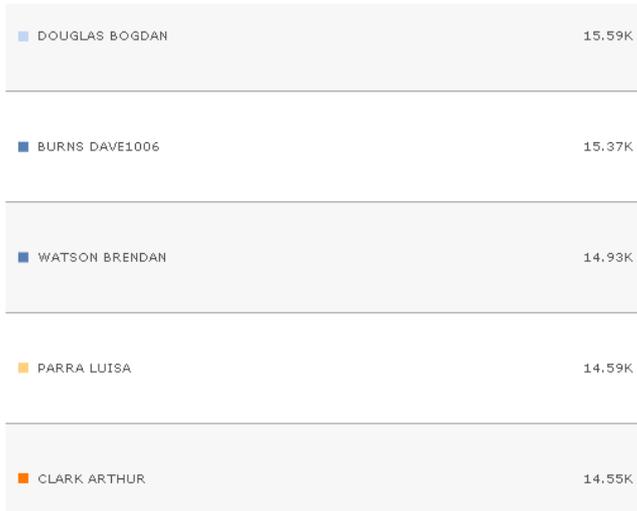
### Donut (3D)



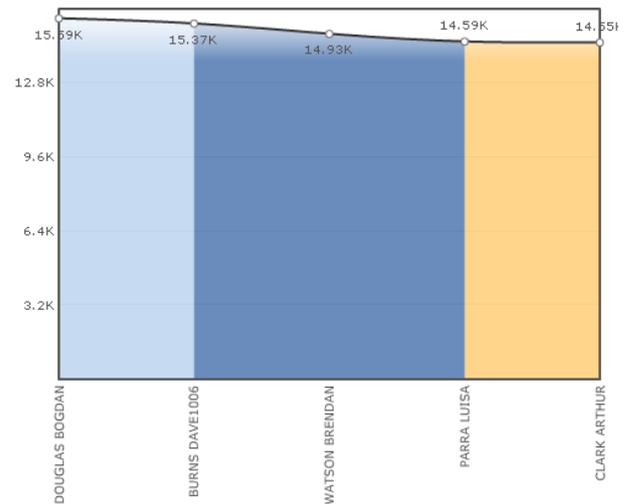
### Funnel



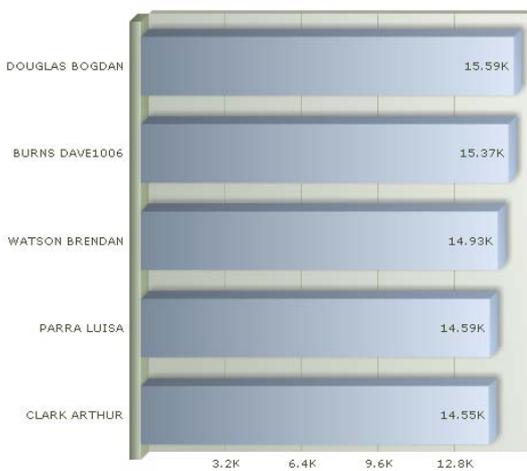
### Grid



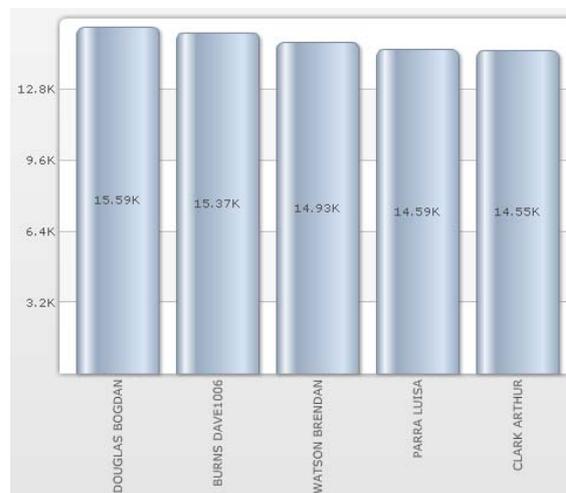
### Spline Area



### Bar Column (3D)

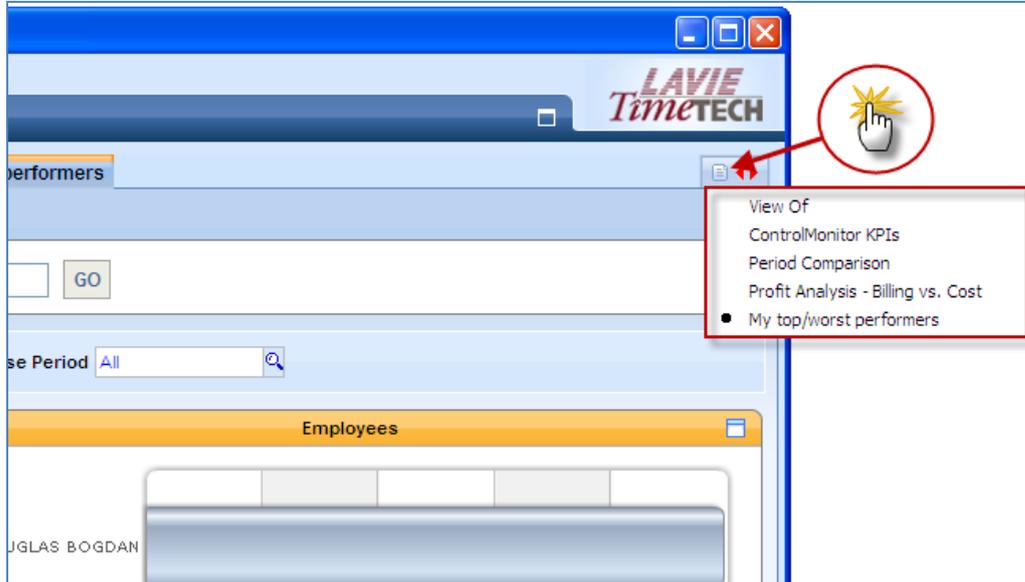


### Scroll Stacked Column (3D)



### Additional Navigation Shortcuts

Click the page icon  on the right side of the screen to access a menu that easily enables you to browse between tabs.



### Color Schemes

TimeKeeper Analytics provides a number of color backgrounds to choose from. Here are some samples:

**Aque**



**Pastel**



**Mac1**



**Lavie1**



**Mac2**



**Mac3**



## **Before You Begin**

Before you begin working in **TimeKeeper Analytics**, please note the following:

- **TimeKeeper Analytics** is a product that amasses and generates tremendous amounts of information. It is only natural that such a product offers, in return, a tremendous number of options. This guide presents the most basic options.
- Since the **TimeKeeper Analytics** user interface can be customized to suit individual clients' needs, the graphics and procedures in this manual reflect usage of the system as it ships from the factory, and do not account for differences in custom installations. Since default settings differ per customer, all references to "default" settings with accompanying screenshots are for illustrative purposes only.

## Analyzing Data from the TimeKeeper Module

### Overview

This section describes how to view and filter graphic representations of the time and attendance data accumulated by the **TimeKeeper** module.

**NOTE:** The **Daily Attendance** and **Pay-Period Attendance** screens are similar in function, layout, and terminology. This section uses **Daily Attendance** as the primary example. Any differences between the two will be emphasized.

### Daily and Pay-Period Attendance

This screen enables you to analyze time and attendance data per daily records, with *daily* referring to date ranges of single days to multiples thereof.

To access the **Daily Attendance** screen, from the main screen, in the **TimeKeeper Module** area, click **Daily Attendance**. The **Daily Attendance** screen appears.



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

The **Daily Attendance** screen is comprised of four possible subscreens. Each subscreen is accessed by selecting the appropriate tab. A description of each subscreen follows. Choose the screen which suits your organizational needs.

**NOTE:** Navigating between tabs causes the screens to revert to the default settings. To save any settings or results, see [Custom Reports](#).

### **View of Screen**

The **View of** screen (default) provides a general, initial, "quick-glance" overview of your selected criteria via clear, colorful graphs. The screen is divided into three sections:

- Your selected corporate hierarchy's performance per selected criteria. These are called Key Performance Indicators and can be absence, attendance, expenses, etc. They can be filtered by date. You can view your entire corporate hierarchy'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 (see **1** in the following screen).
- Your selected corporate hierarchy's absence record, filtered by absenteeism indicators (paid absences, unpaid, etc) and absence type (sickness, etc). Absence data is also displayed by weekdays (see **2** in the following screen).
- The actual attendance versus the standard (company-required) attendance, and the deviation from that standard (see **3** in the following screen).

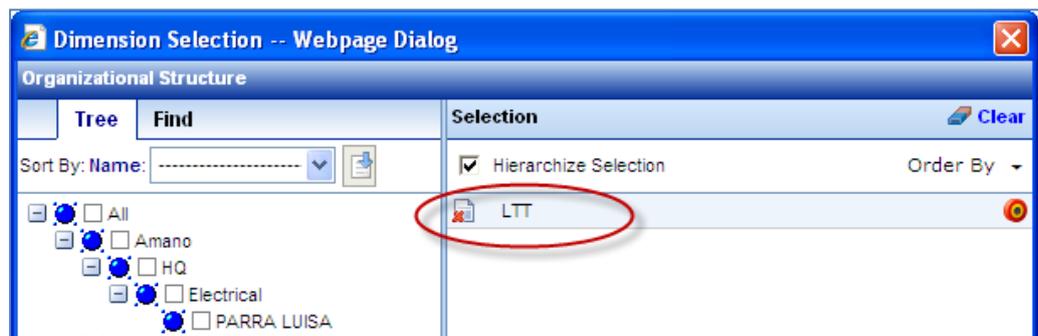


To generate your desired **View of** graphs, do as follows:

1. Click the **View of** tab. The **View of** screen appears.
2. Select a corporate hierarchy by doing as follows:
  - a. In **Organizational Structure**, click the **Find**  button. The **Dimensions Selection** screen appears (refer to [Dimensions Selection](#) for an overview of the Dimensions functionality).
  - 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 corporate hierarchy whose performance you want to measure.

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

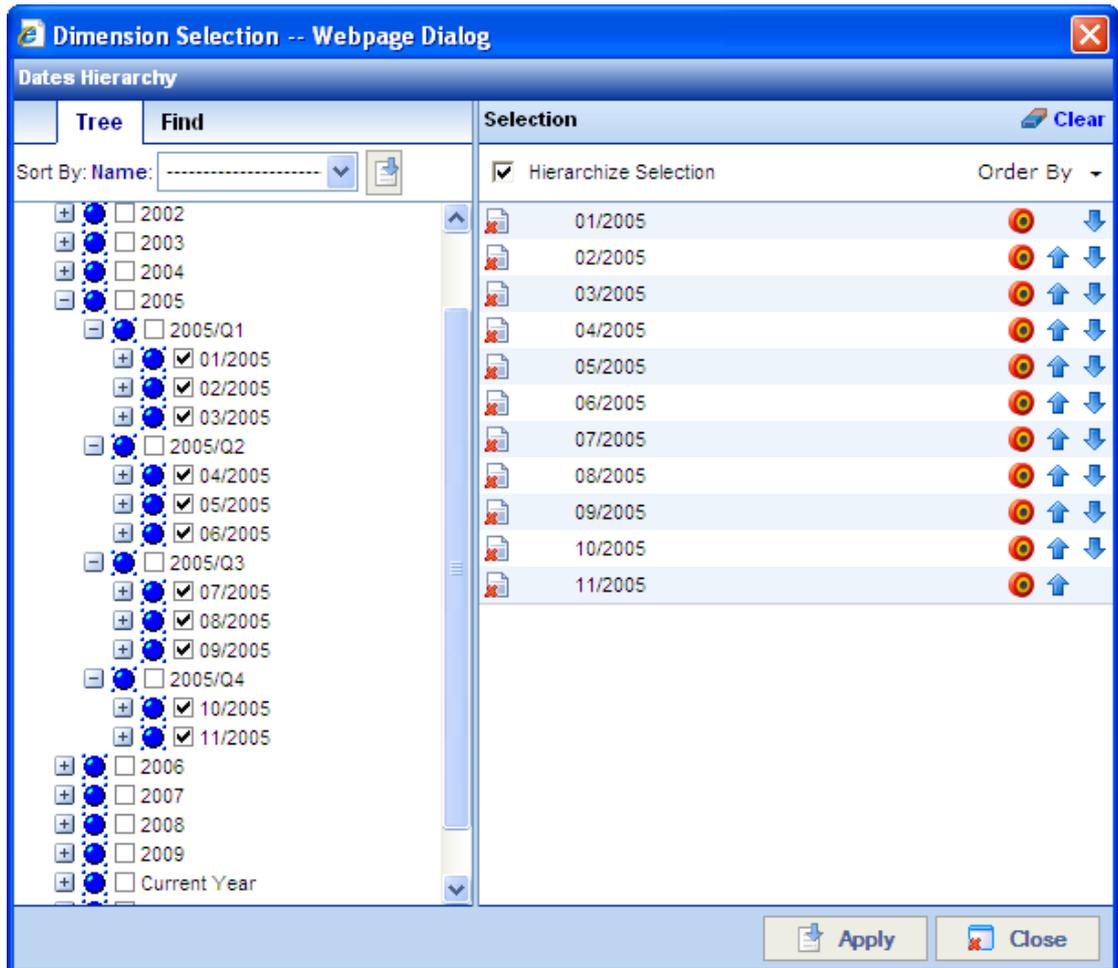
After selection, the corporate hierarchy's name appears in the **Selection** pane on the right side of the **Dimensions Selection** screen.



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

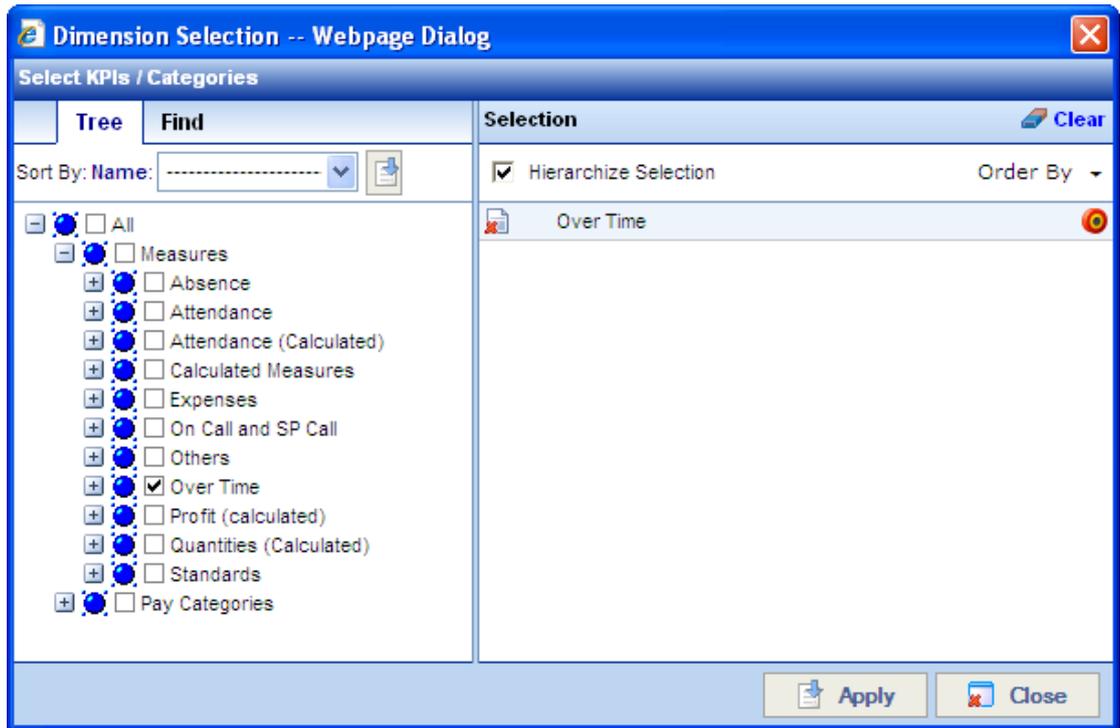
**REMINDER:** Regardless of the **Dimension Selection** screen that you are working in, when making selections, do not make any "double selections" by selecting an entry in the hierarchy and a sub-entry of that unit. ***This will distort the results.***

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.



**NOTE:** The period selections in **Pay-Period Attendance** are *weekly, bi-weekly, monthly, and bi-monthly*.

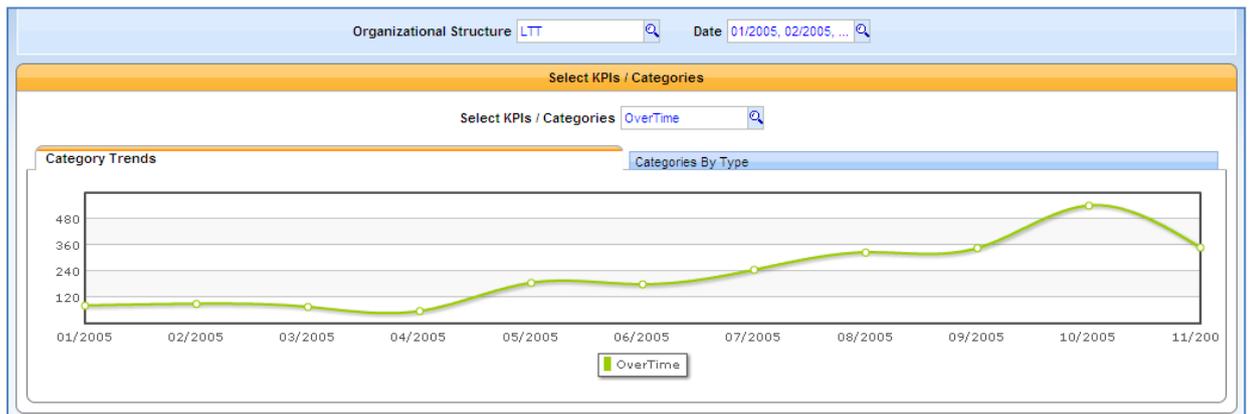
- b. Click **Apply** when done.
4. Click **Select KPIs/ Categories** and find the desired KPI.
  - a. Drill down for specific KPI sub-entries if needed.



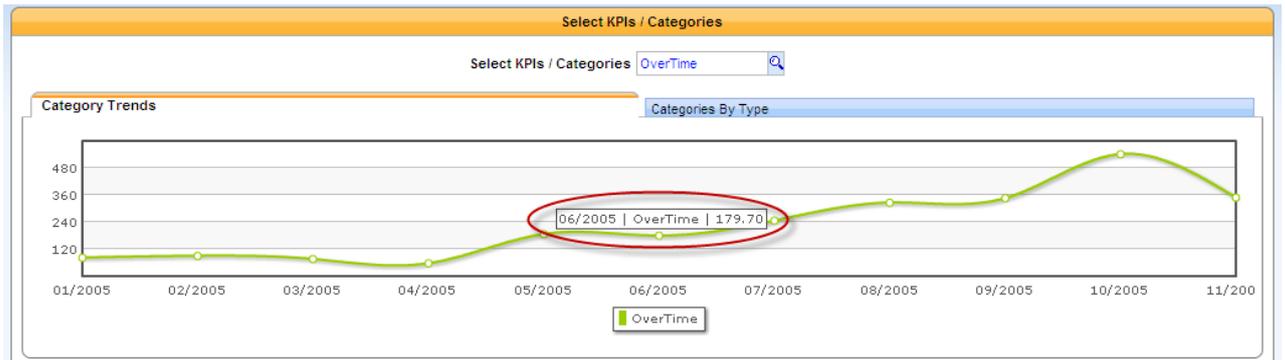
**NOTE:** The selections in **Pay-Period Attendance** contain the word "*period*" instead of "*daily*".

- b. Click **Apply** when done.

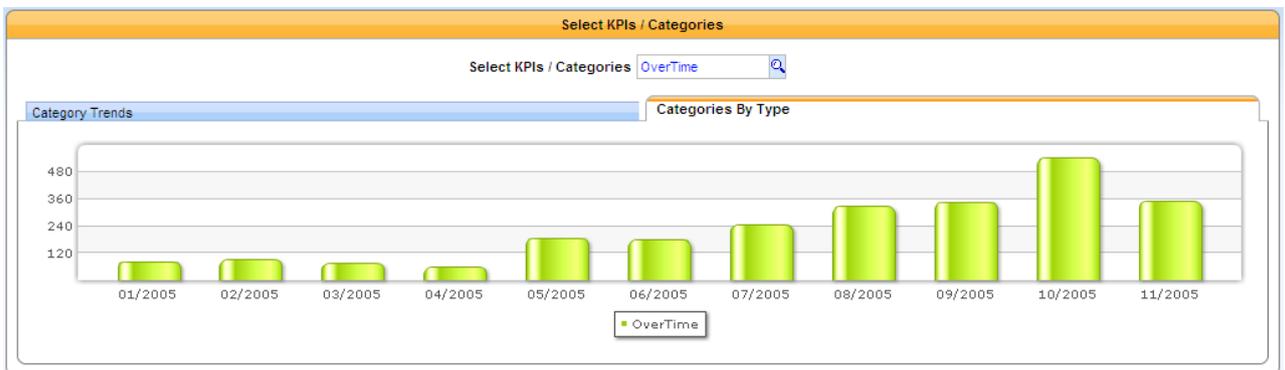
In the following example, the top graph displays how many hours of overtime the employees in the **LTT** corporate hierarchy worked per month in 2005.



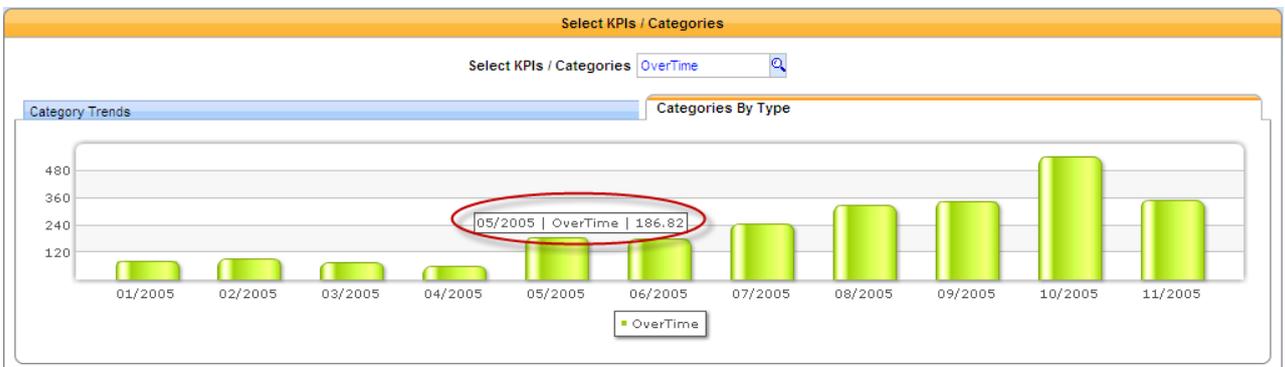
- 5. Place your cursor over any of the yearly points on the line for an informative tooltip:



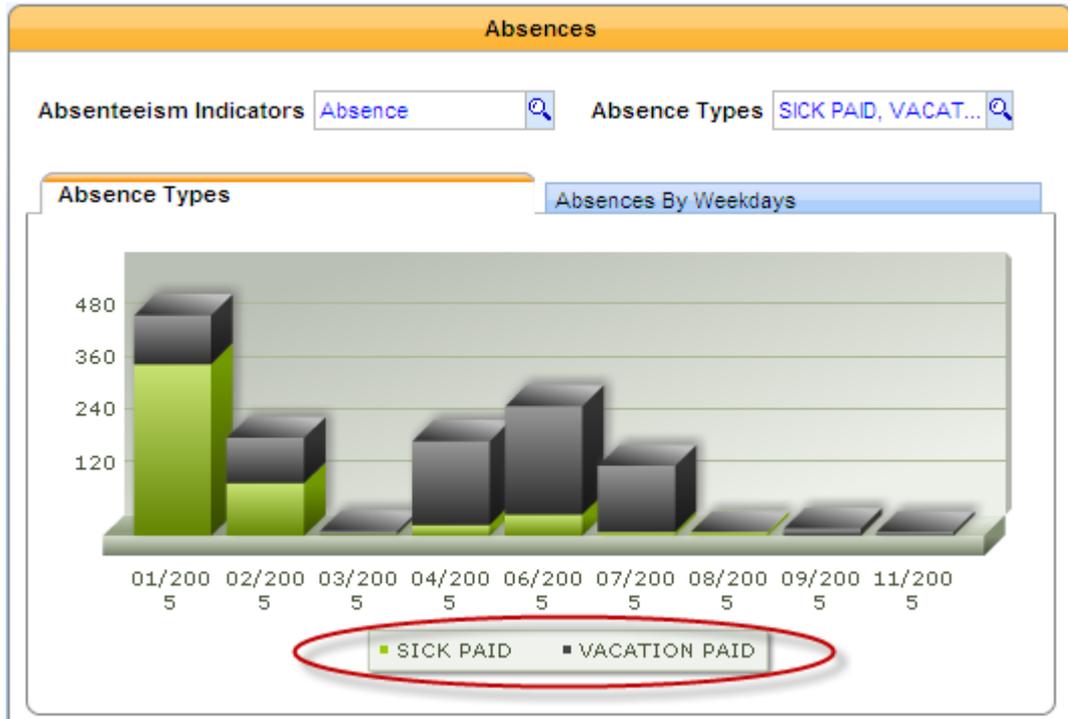
6. Click the adjacent **Categories by Type** tab to view the same results in column form.



7. Place your cursor directly on the column for the tooltip:

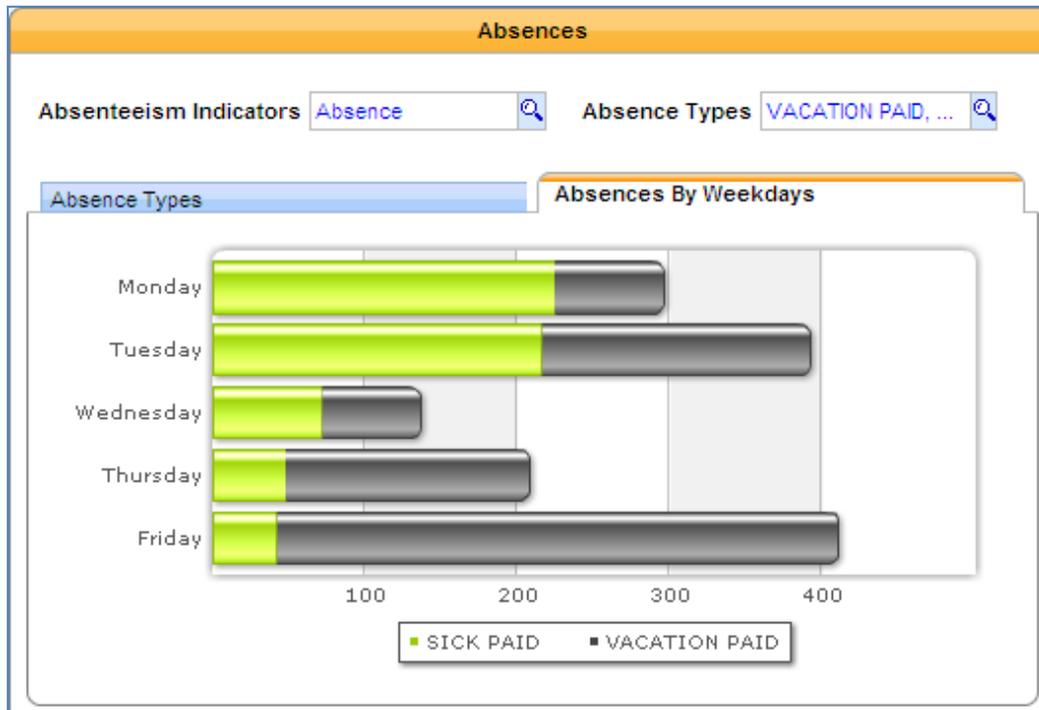


8. In the bottom left, in the **Absence** graph, click **Absenteeism Indicators**. The **Dimension Selection** screen appears.
- Select an **Absenteeism Indicator** and click **Apply**.
  - In the adjacent tab, click **Absence Types**. The **Dimension Selection** screen appears.
  - Select an **Absence Type** and click **Apply**. Note that the absence types are displayed at the bottom of the screen.

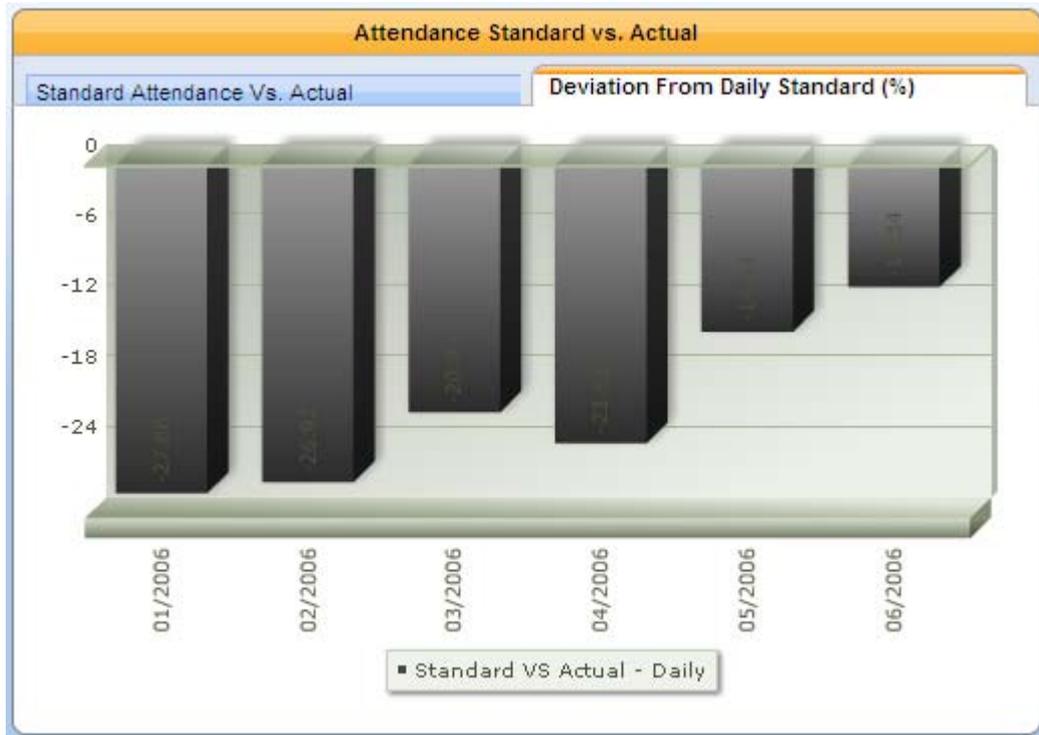


**NOTE:** The **Absences by Weekdays** tab appears only in **Daily Attendance**.

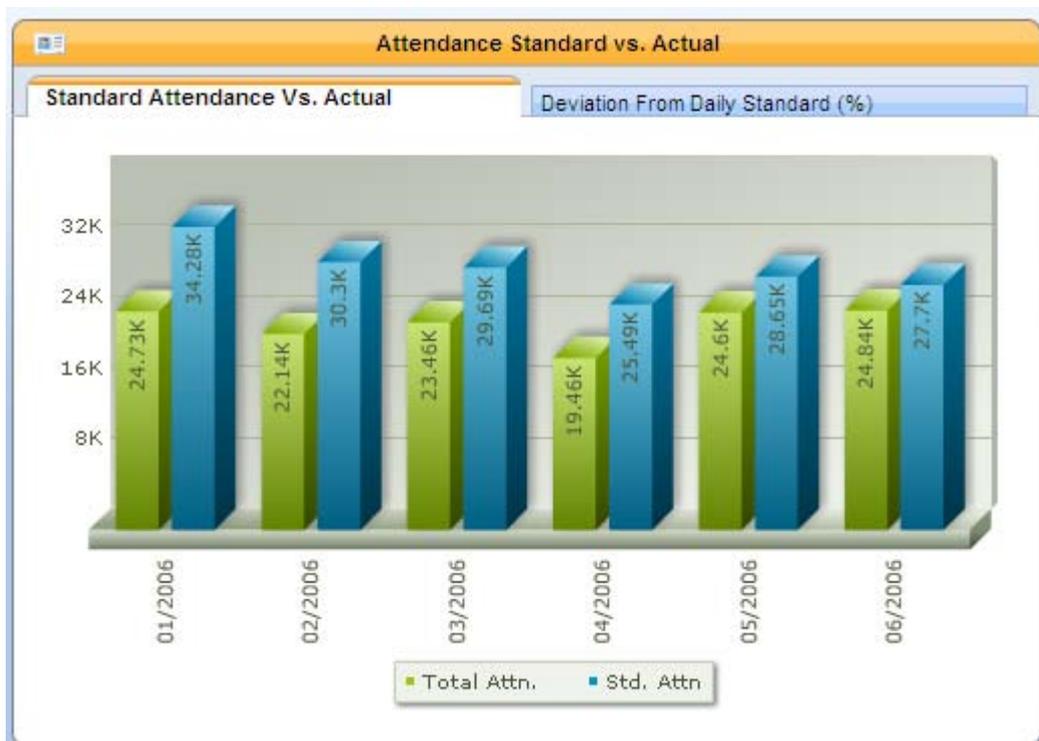
- Click the adjacent **Absences by Weekdays** tab. The screen displays absences by the weekdays by which they occurred (Sunday, Monday, etc.)



- 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.



- Click the adjacent **Standard Attendance vs. Actual** tab to view a graph displaying standard attendance per year to actual (total) attendance per year.

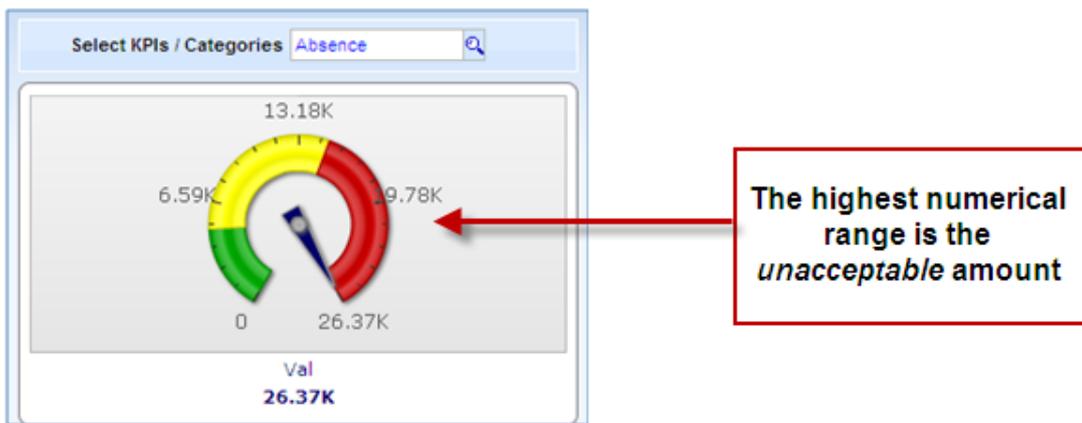


- Click any of the other tabs to continue your analysis.
- To return to the main screen, from the main toolbar, click **Home** .

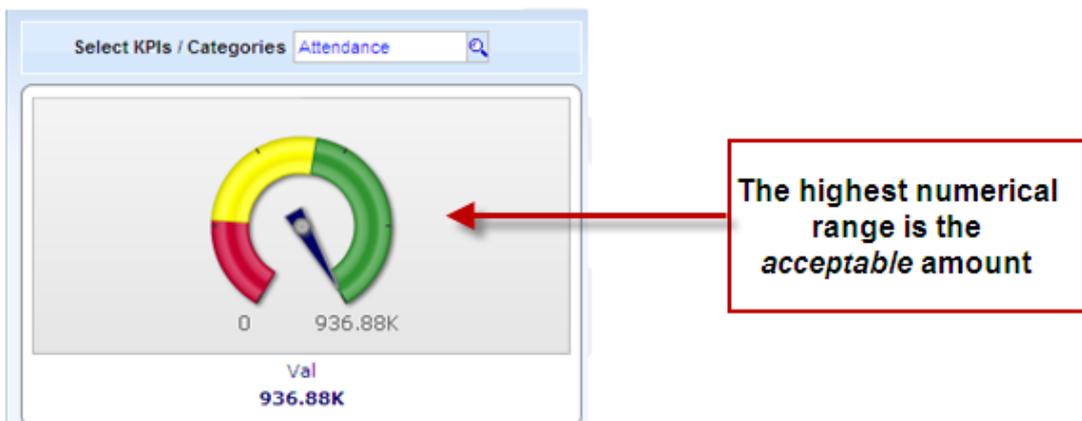
## Monitor KPIs

Key Performance Indicators (KPIs) are the metrics that you use to evaluate how successful your corporate hierarchy 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 corporate 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, as the following demonstrates:



On other dashboards, a high number can be the acceptable, such as attendance, resulting in a red (unacceptable) yellow (borderline) green (acceptable) configuration:



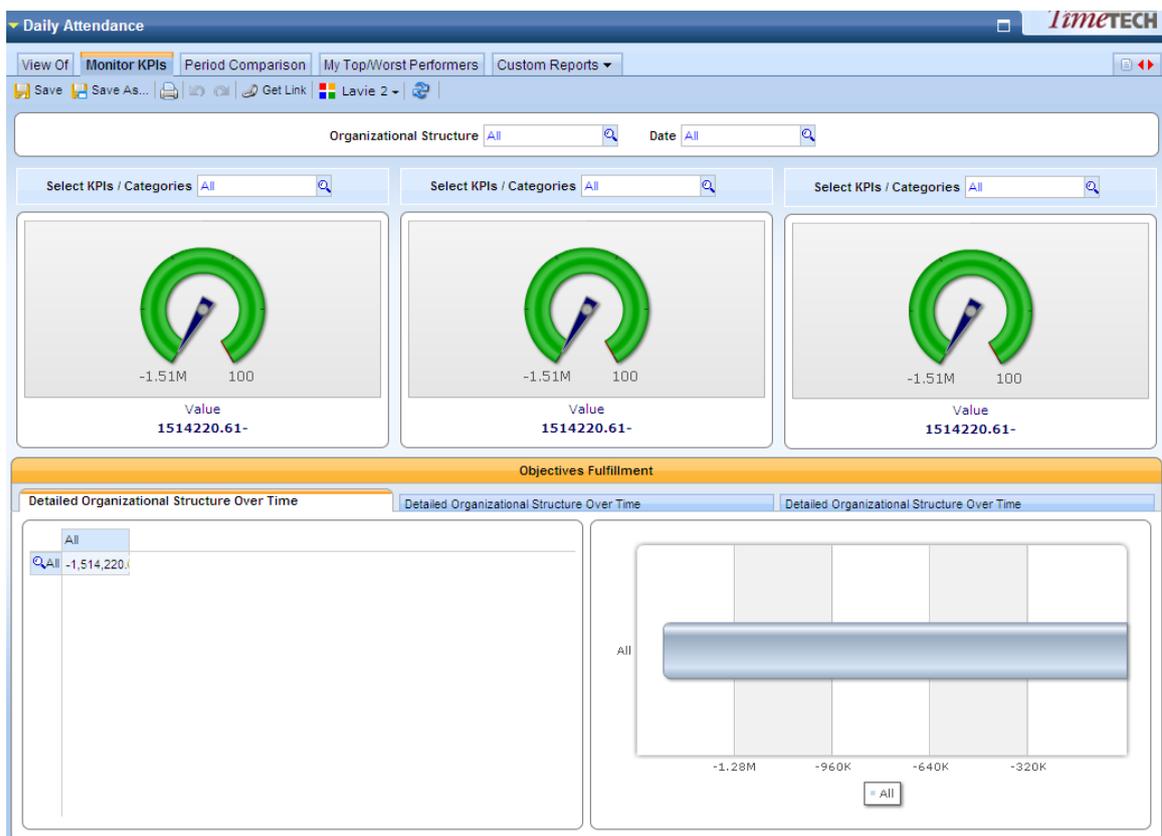
Choose the color and structure that is appropriate for your KPIs.

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

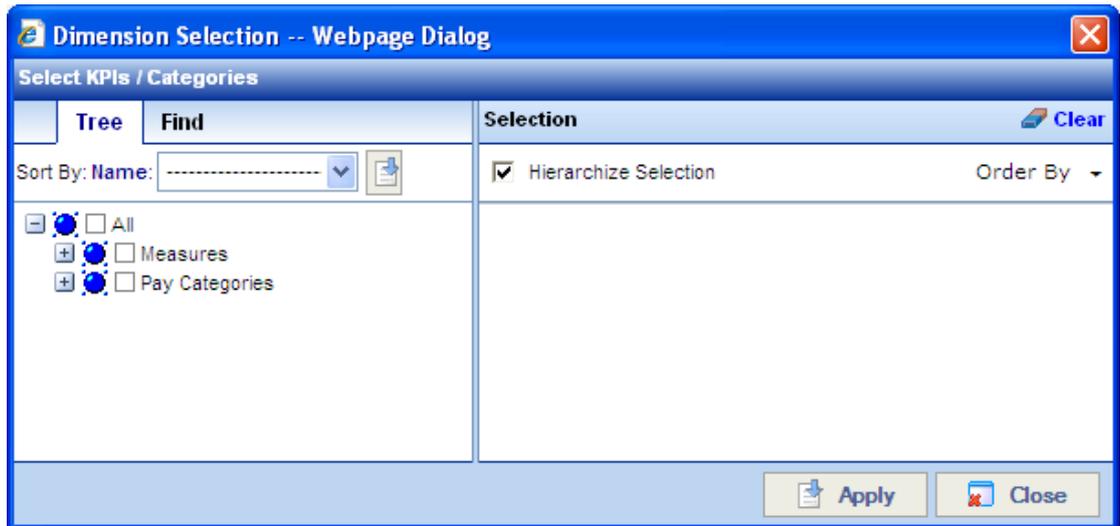
- A numeric chart displaying an analysis of the KPI per corporate hierarchy and period
- A graphic column representation of that numeric chart

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

1. Click the **Monitor KPIs** tab. The **Monitor KPIs** screen appears, configured to the default settings (**NOTE**: differ per installation):

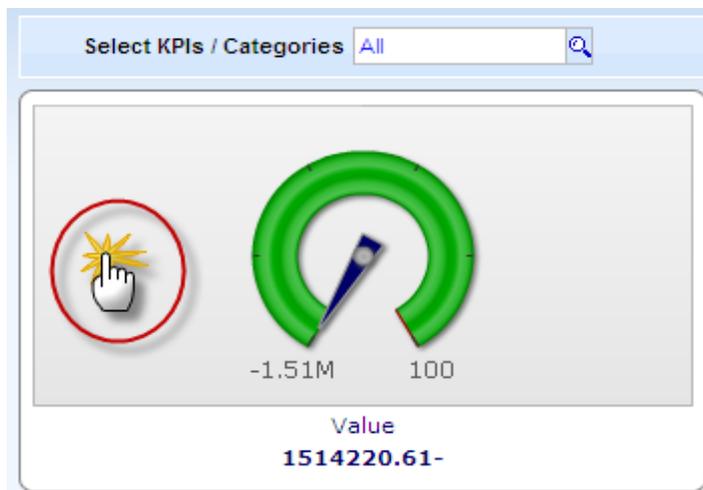


2. In **Organizational Structure**, select the corporate hierarchy that you want to analyze. **NOTE**: Initial selections may already impact the remaining KPI dashboard settings.
3. In **Date**, select the period you want to analyze.
4. In the dashboard on the far left, in **Select KPIs/Categories**, click the **Find**  button. The **Dimension Selection** screen appears.

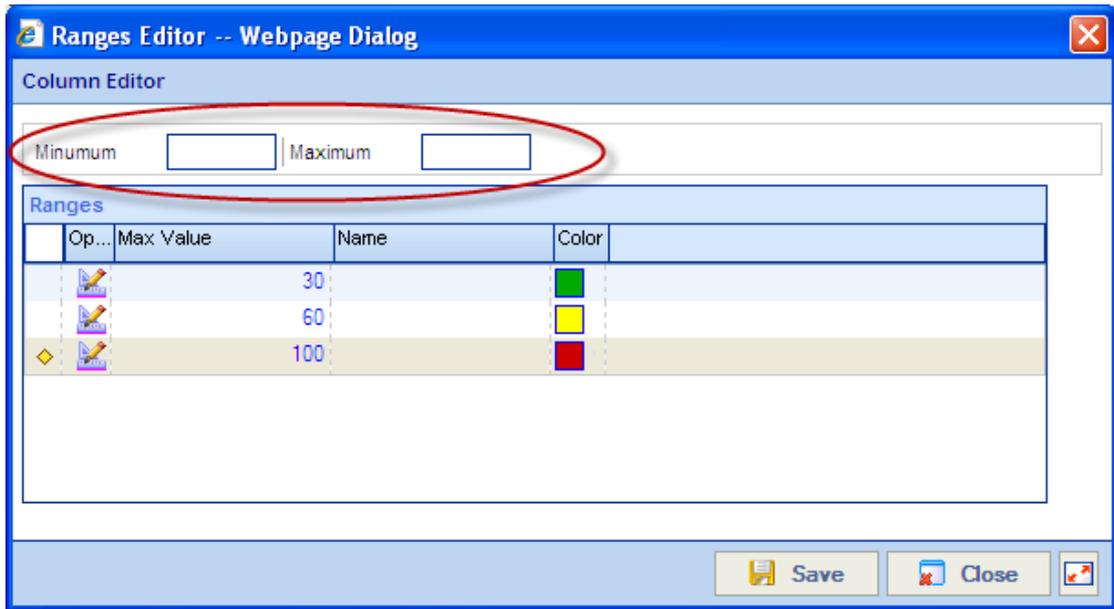


**NOTE:** The selections in **Pay-Period Attendance** contain the word "*period*" instead of "*daily*".

- 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.
5. Click once on the dashboard, as shown here.

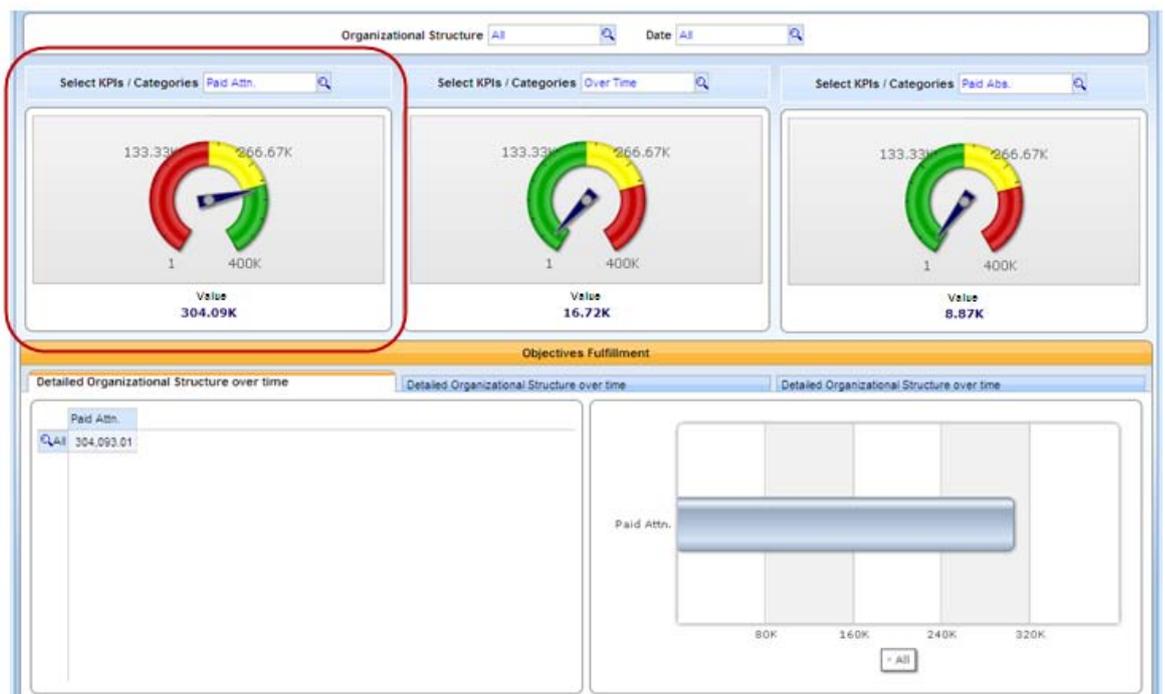
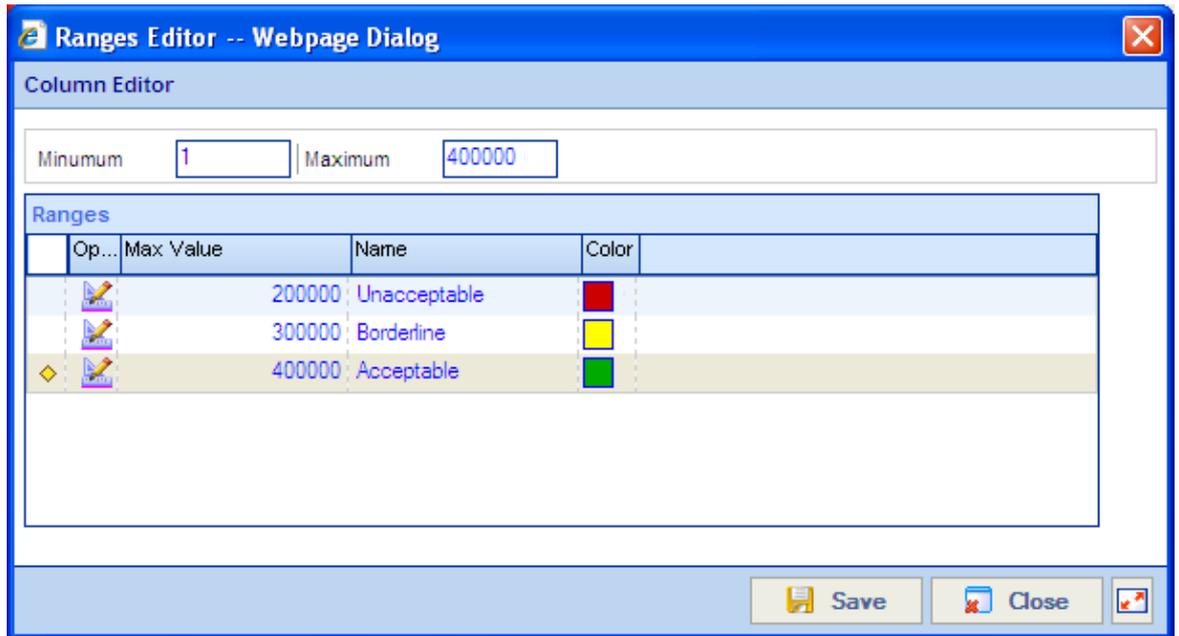


6. The **Ranges Editor** screen appears. In the **Minimum** and **Maximum** entry boxes at the top, set the overall range of values.



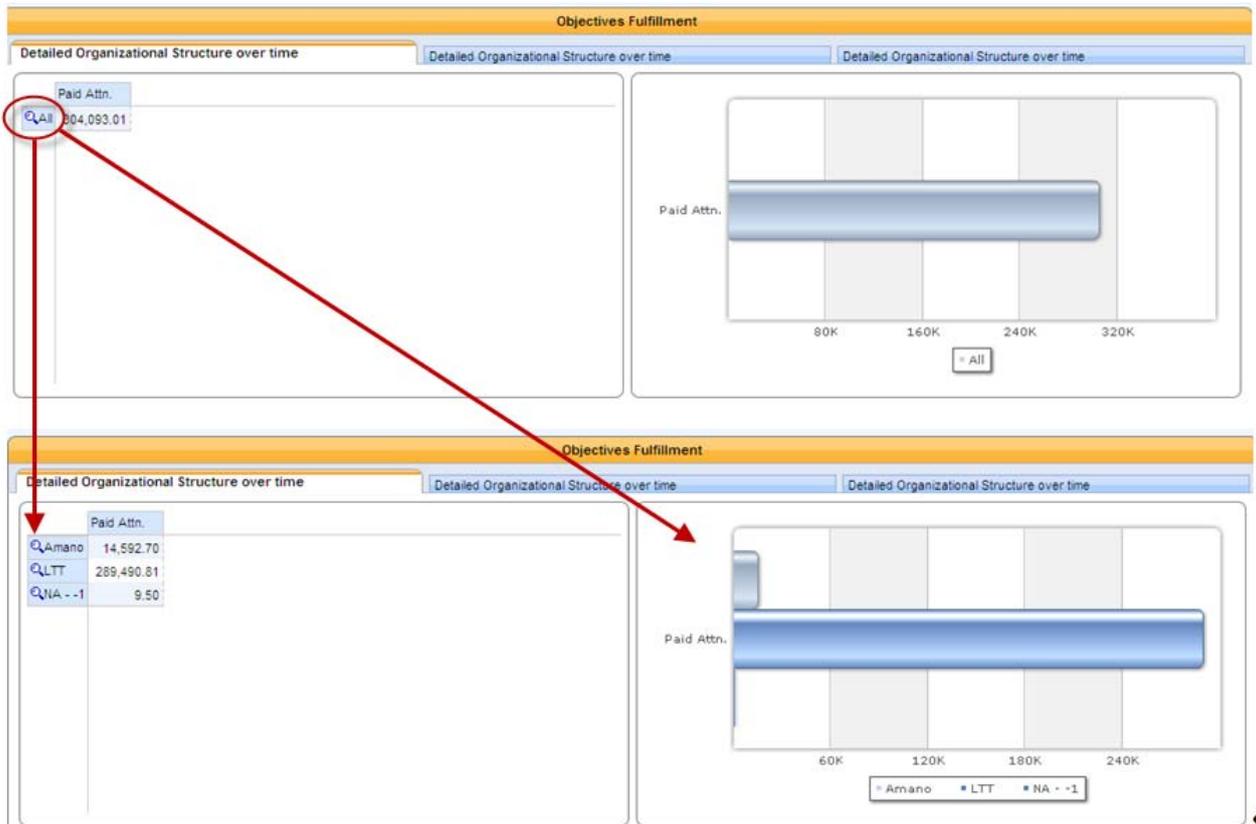
**NOTE:** It is recommended to enter a maximum value slightly larger than the actual value that you are analyzing.

- 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):



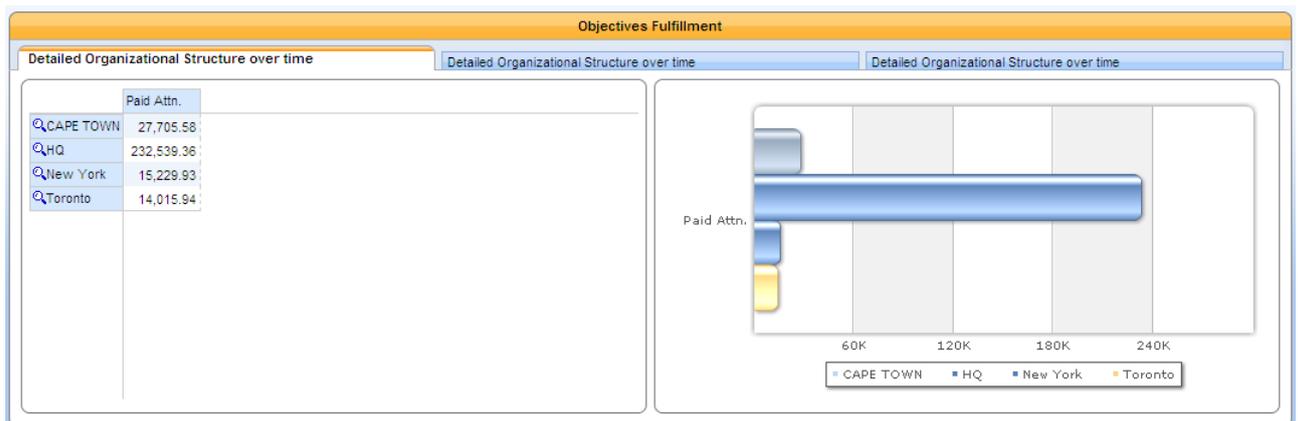
**NOTE:** The word "value at" the bottom of the dashboard displays the total amount of that KPI according to the period and corporate hierarchy you selected

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 corporate hierarchy, 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 displays 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

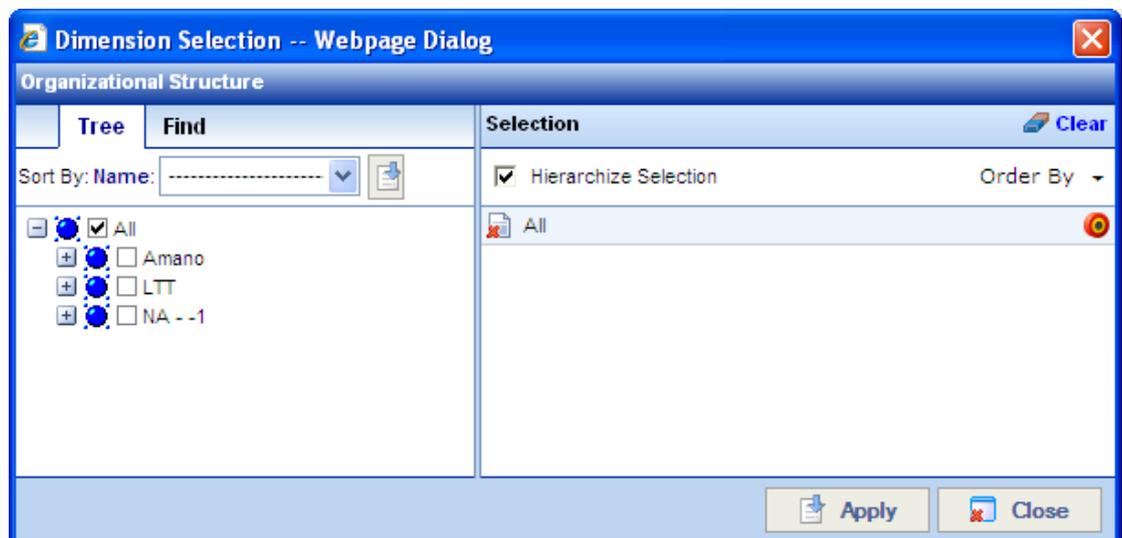
This screen enables you to compare selected criteria of two separate periods of a corporate hierarchy.

By using **Period Comparison**, you can create and view comparisons such as the following:

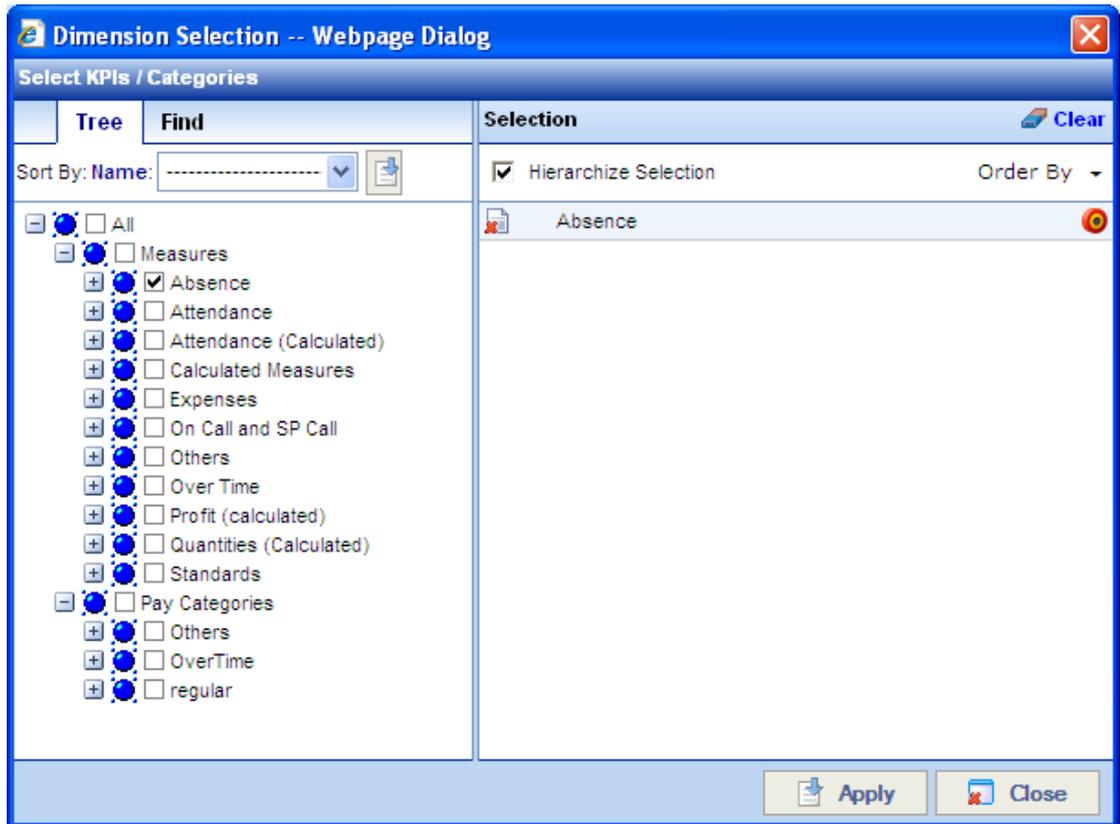
- Compare total attendance in two separate years for the entire corporate hierarchy
- Compare lateness in two consecutive quarters for a specific department
- Compare absences in two months for a specific employee

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 corporate hierarchy/hierarchies 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.



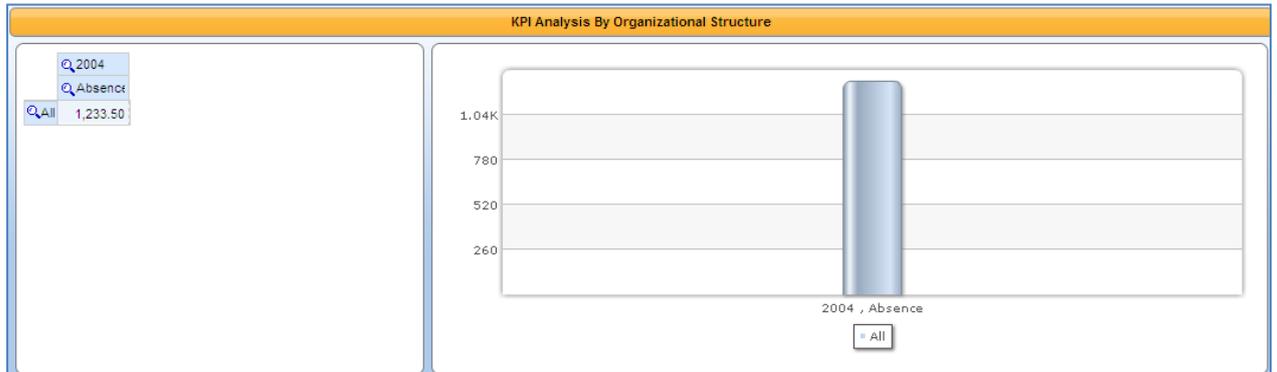
**NOTE:** The selections in **Pay-Period Attendance** contain the word "*period*" instead of "*daily*".

- b. Click **Apply** when done.
4. In **Base Period** and **Compare with 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 **Compare with 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:



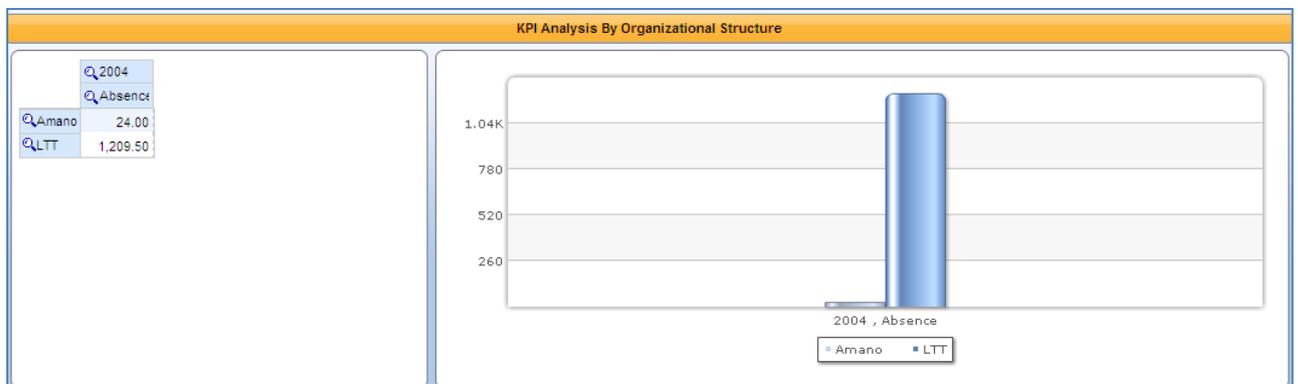
The **KPI Analysis by Organizational Structure** area at the bottom of the screen displays the following:



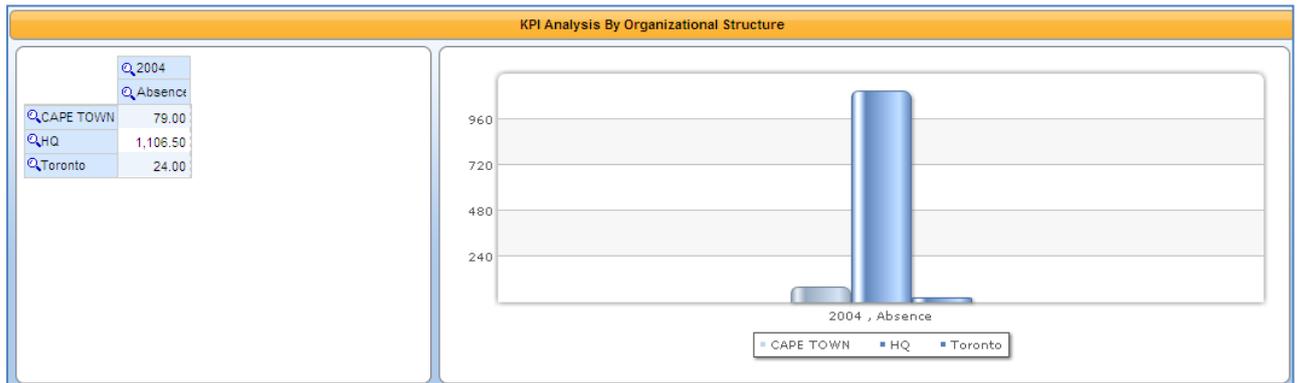
- On the **left** side, the graph displays the KPI/s of the main period in numeric form
- On the **right** side, the graph displays KPI/s of the main period in graphic form

Continue to the following procedures:

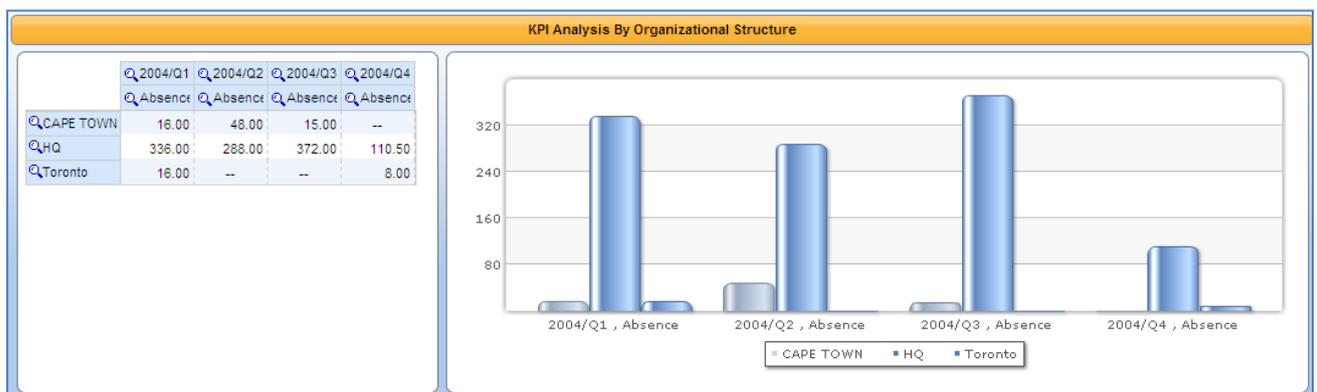
- To drill down, click any of the  icons on the bottom left to select a KPI (alternatively, click the columns on the far right). For example, click **ALL** on the far left to display an analysis by corporate hierarchy. Note that this process also impacts the bar graph:



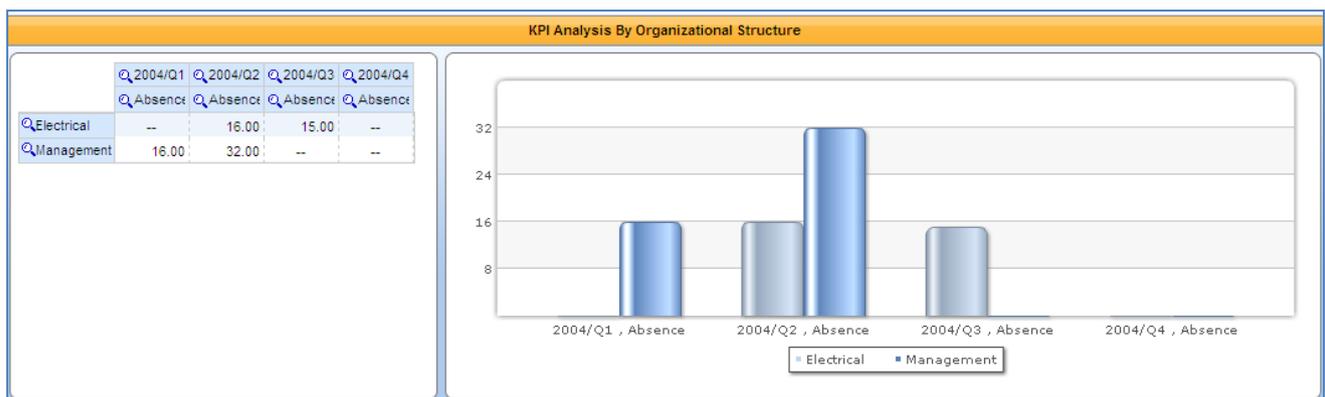
- To view a further analysis by organization, click either of the corporate hierarchies. For example, click **LTT** to view an analysis by site:



7. To view a further analysis of 2004 by quarterly periods, click **2004**:



8. To analyze a corporate hierarchy particular by departments, click any of the organizational units, and the analysis appears (this example displays the results of clicking **Cape Town**):



9. Continue to drill down as needed.

10. Click any of the other tabs to continue your analysis.

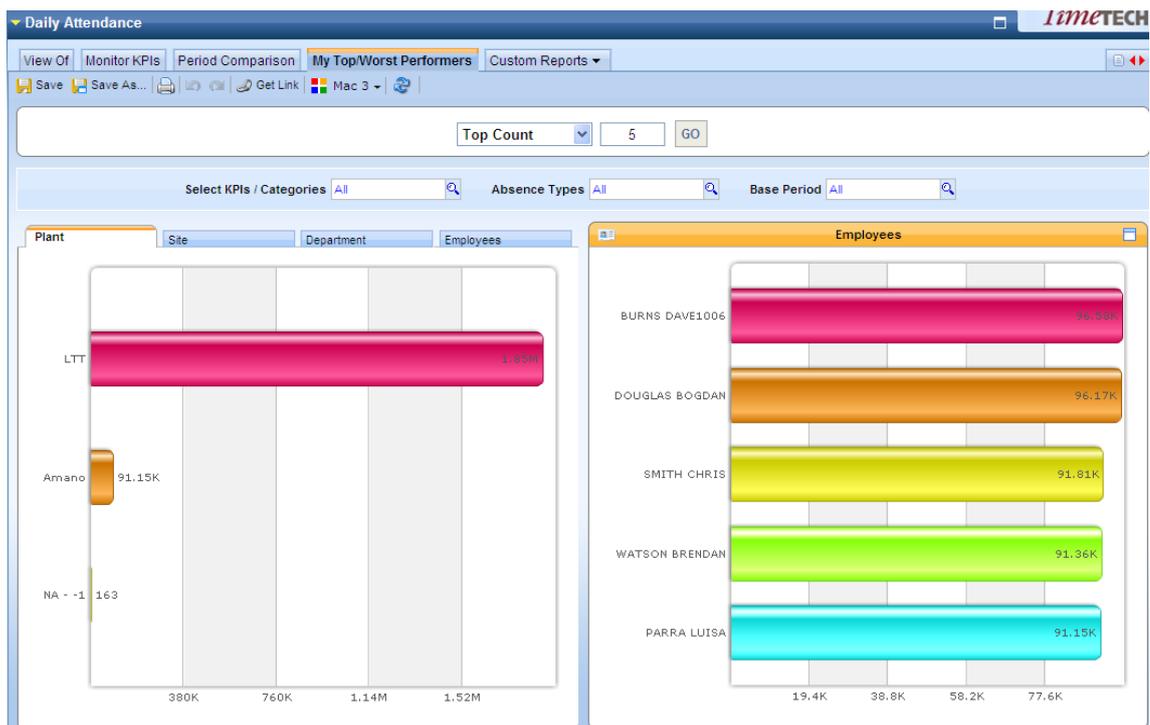
11. To return to the main screen, from the main toolbar, click **Home** .

## 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 or from the highest or the lowest (for example, the bottom ten or top five).

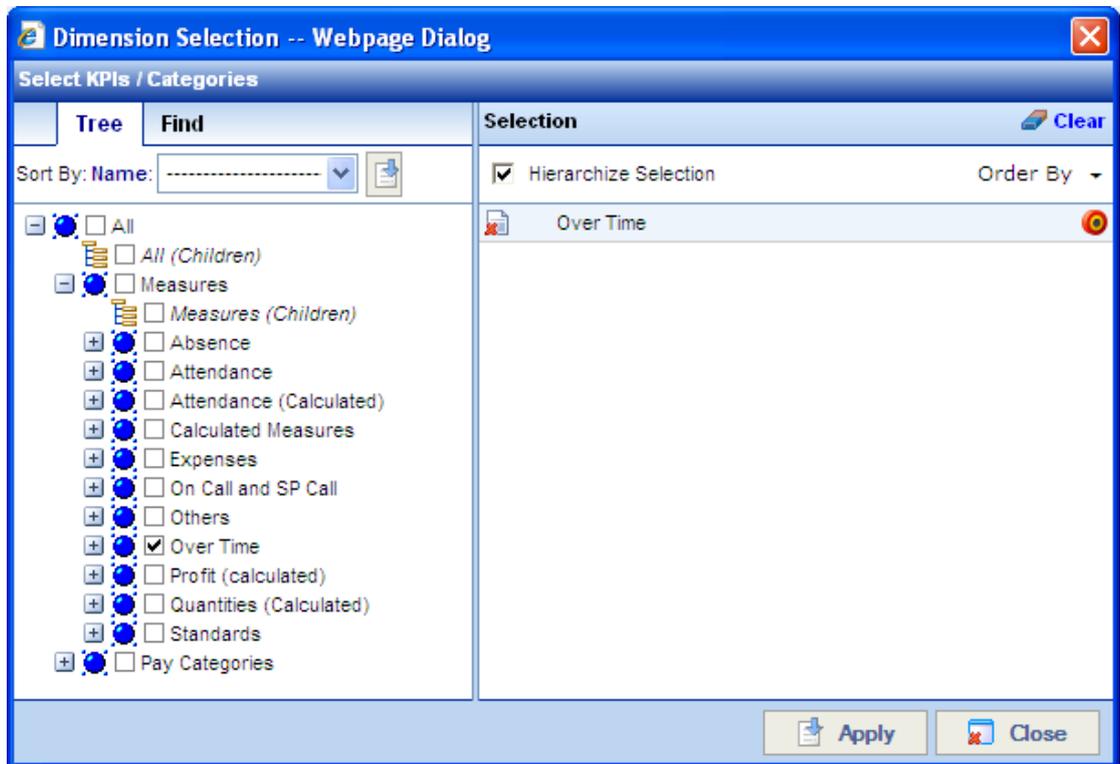
To use the **My Top/Worst Performers** screen, do as follows:

1. Click the **My Top/Worst Performers** tab. The **My Top/Worst Performers** screen is displayed, set to the default (**NOTE**: this differs per customer).

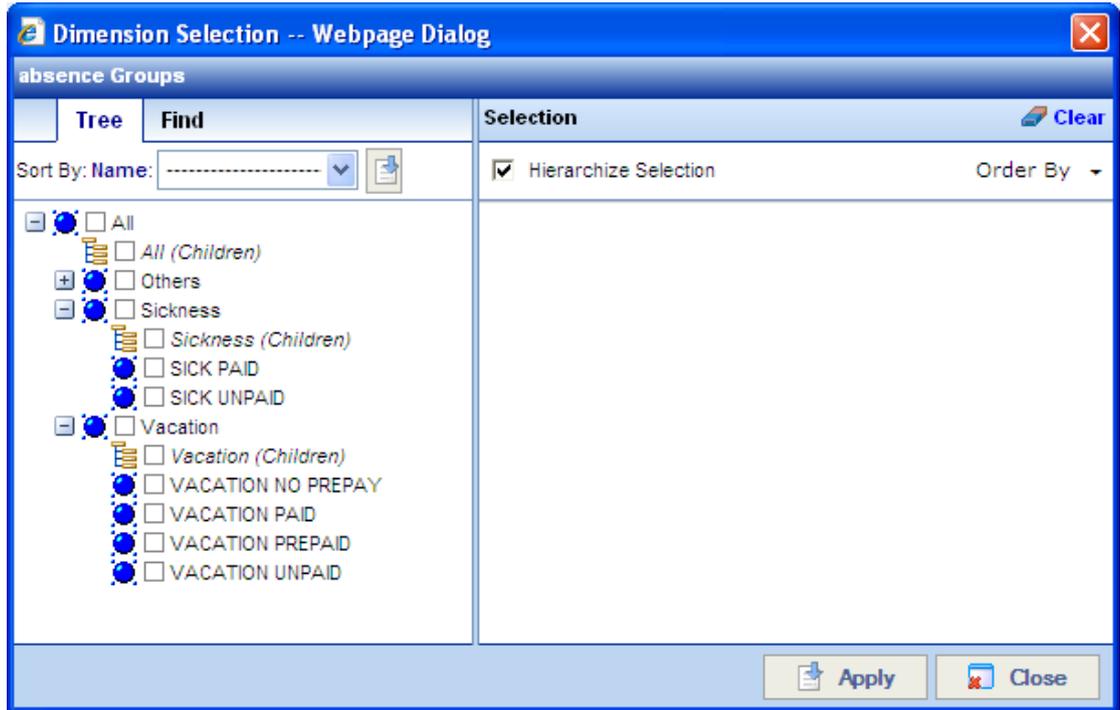


2. In the entry box in the top middle, select the mode by which to analyze the corporate hierarchies:
  - **Top Count** – displays the number of employees with the highest performance in a selected criteria
  - **Bottom Count** – displays the number of employees with the lowest performance in a selected 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. In the adjacent entry box, 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 **Find** icon. The **Dimensions Selection** screen appears.

- In the **Tree** pane on the left, select the criteria by which you want to analyze the corporate hierarchy. Expand any of the options to drill down if necessary.

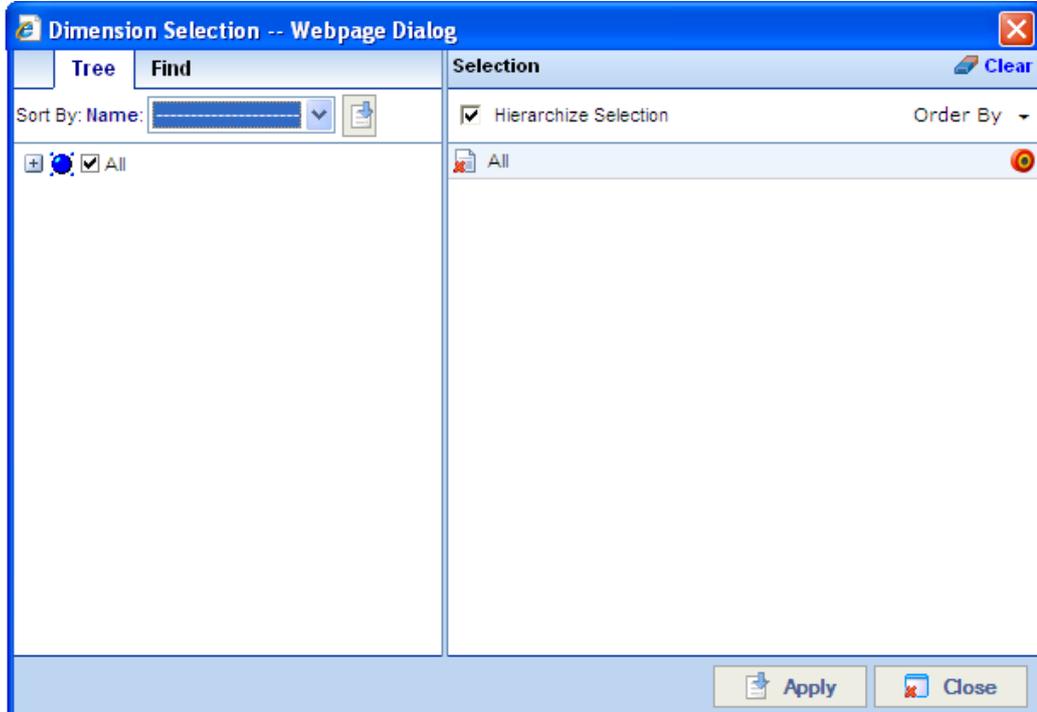


- In **Absence Types**, click the **Find**  icon *only* if you have selected attendance in **Select KPIs/Categories**. From the **Dimensions Selection** screen, select an absence reason. (If you have not selected attendance in **Select KPIs/Categories**, leave the selection at **ALL**.)

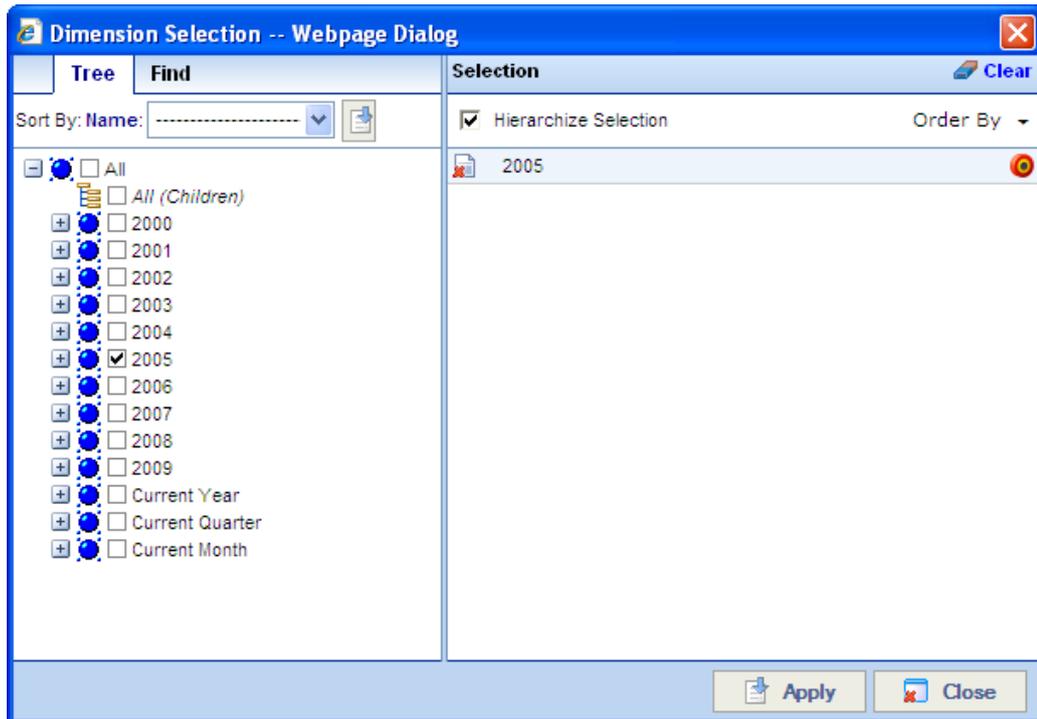


**NOTE:** Absence Groups are found only in theTimeKeeper Module.

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.



**NOTE:** The period selections in **Pay-Period Attendance** are *weekly, bi-weekly, monthly, and bi-monthly*.

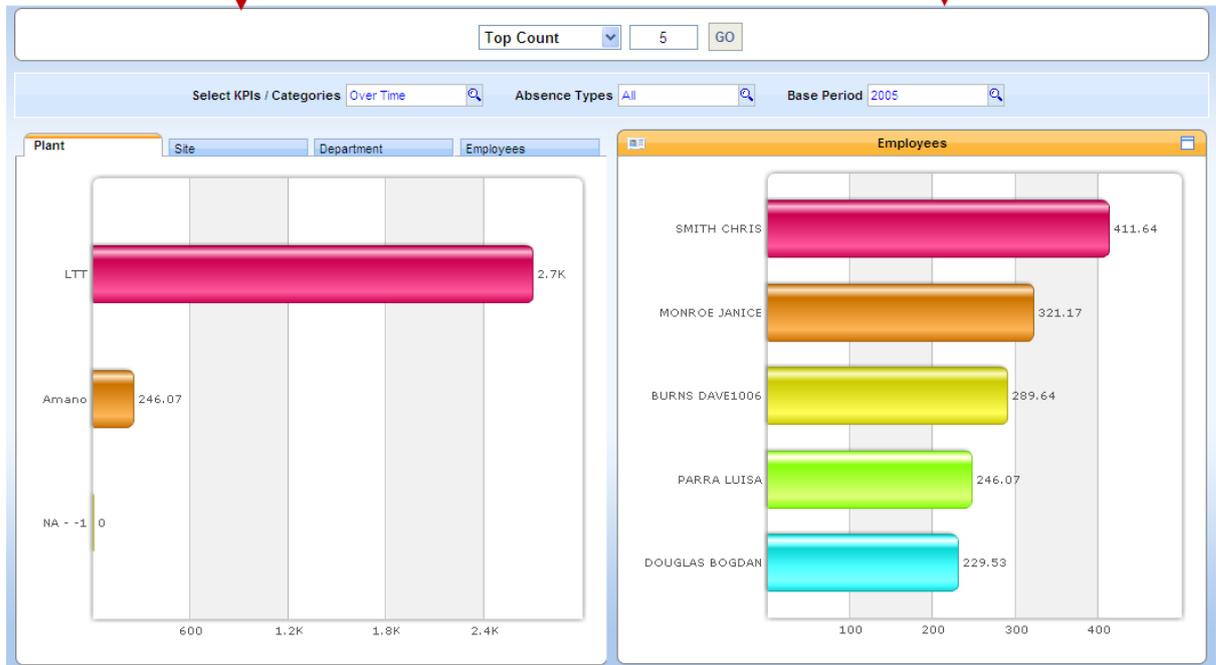
9. Click **Apply** to generate the report. To change any values in the entry boxes, modify as needed, and click the **Go** button GO.

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 corporate hierarchy.

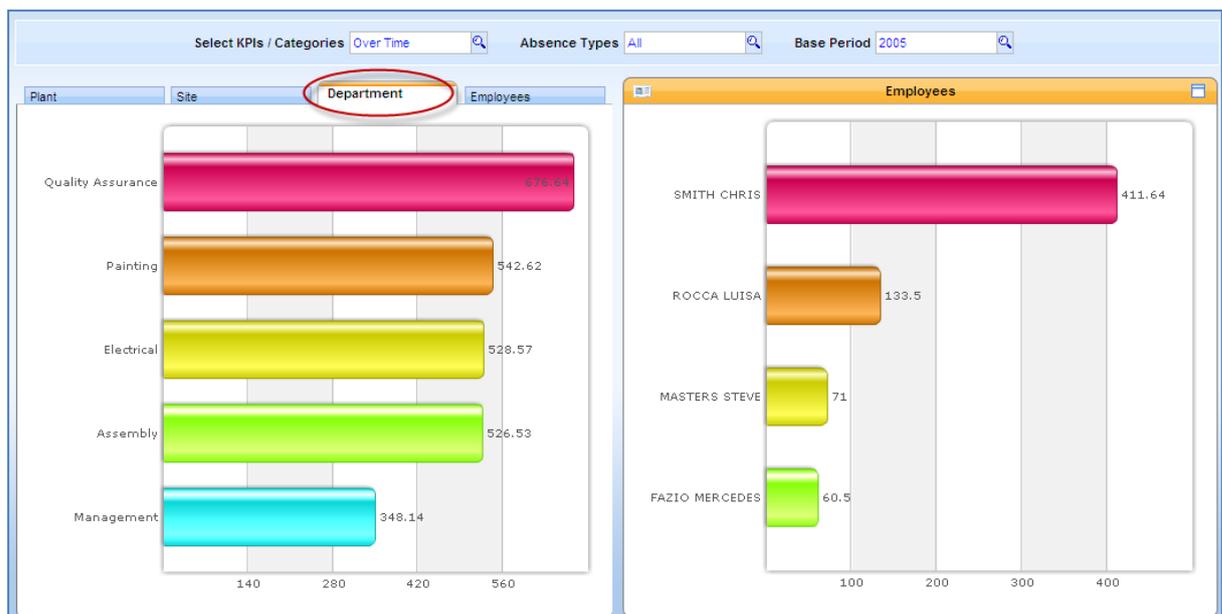
Primary  
Analysis

Secondary  
Analysis



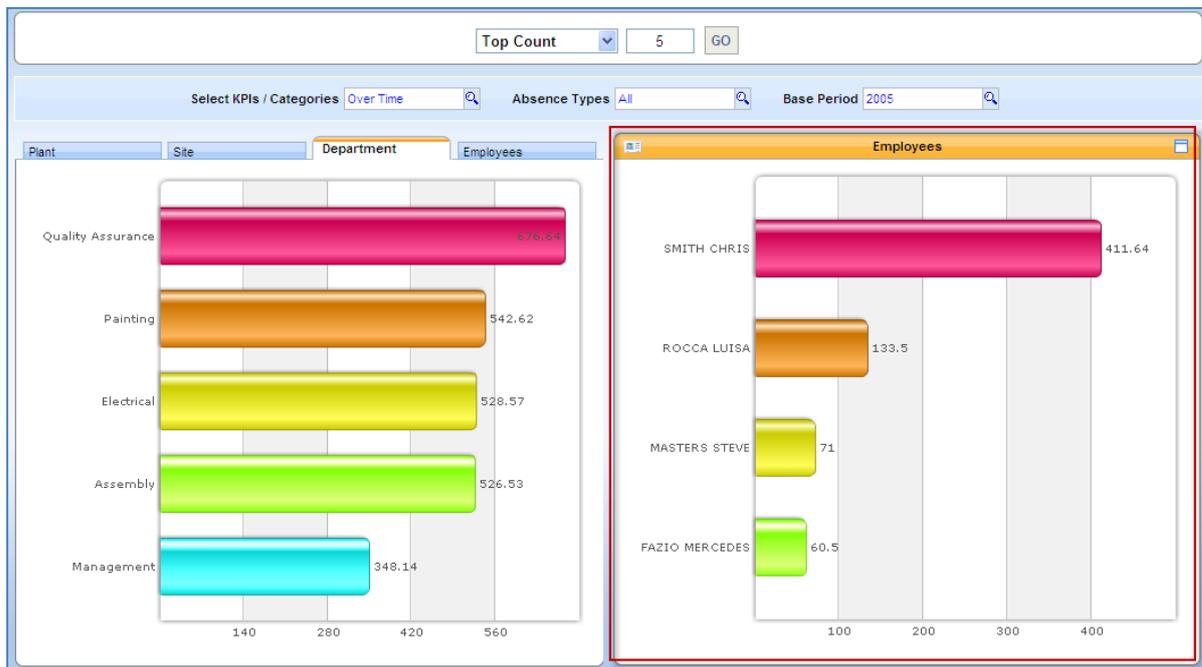
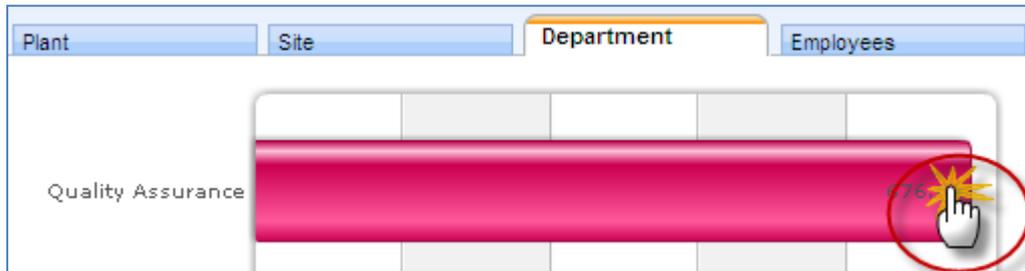
Optionally, do any of the following:

- 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:



4. 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**.
5. To expand the graph to full-screen size, click .
6. From the **View of** screen tabs, click any of the other tabs to continue your analysis.
7. To return to the main screen, from the main toolbar, click **Home** .

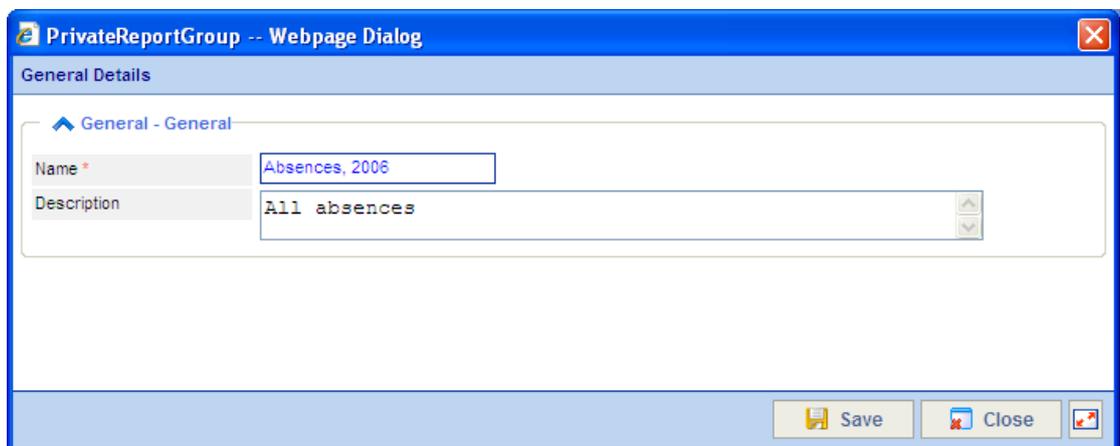
## Custom Reports

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.

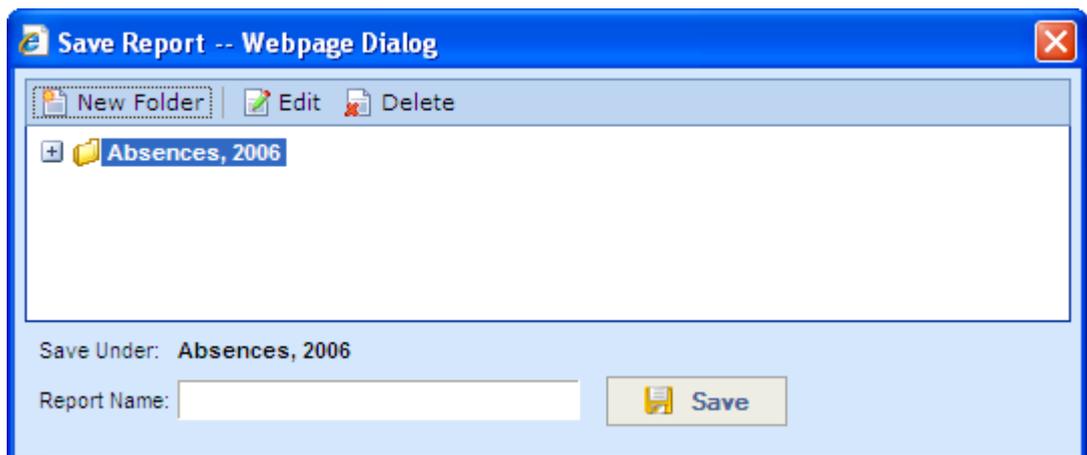
## Saving Reports

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

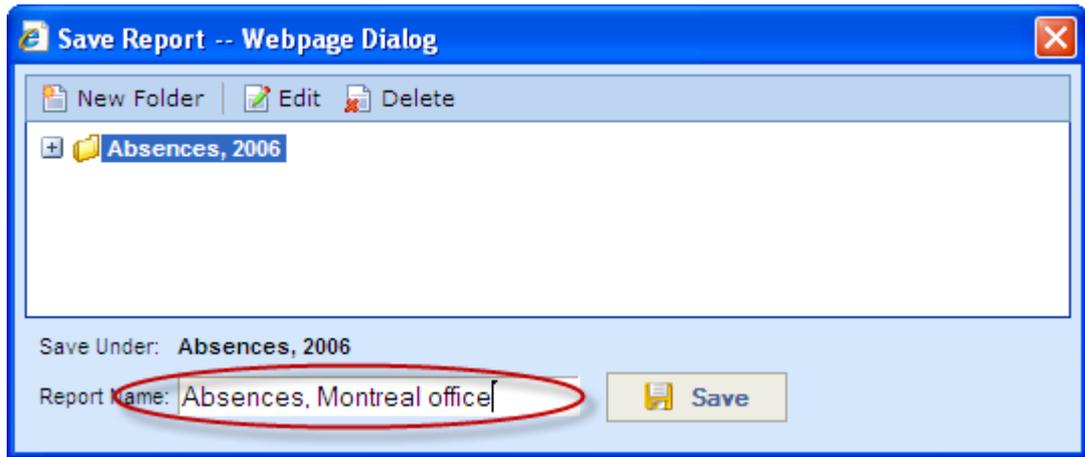
1. From the toolbar, click **Save As** . The **Save Report** screen appears.
2. Click **New Folder**. The **Private Report Group** screen appears.
3. Enter a name and a brief description of your report group.



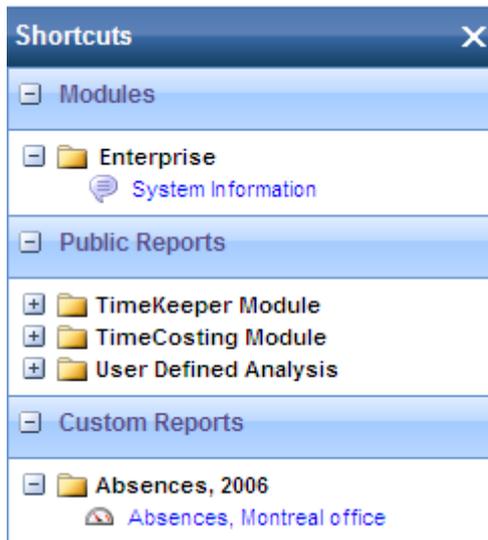
4. Click **Save**.
5. A confirmation message appears. Click **OK**. The Report Group is displayed and highlighted in the **Save Report** screen.



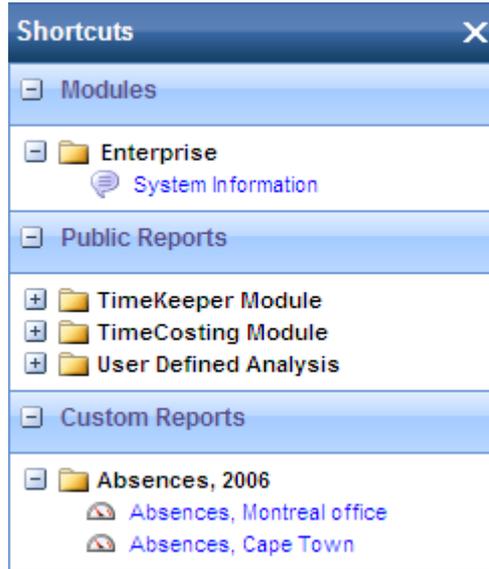
6. In the **Report Name** field, enter a name for the specific report/settings/screen results you want to save.



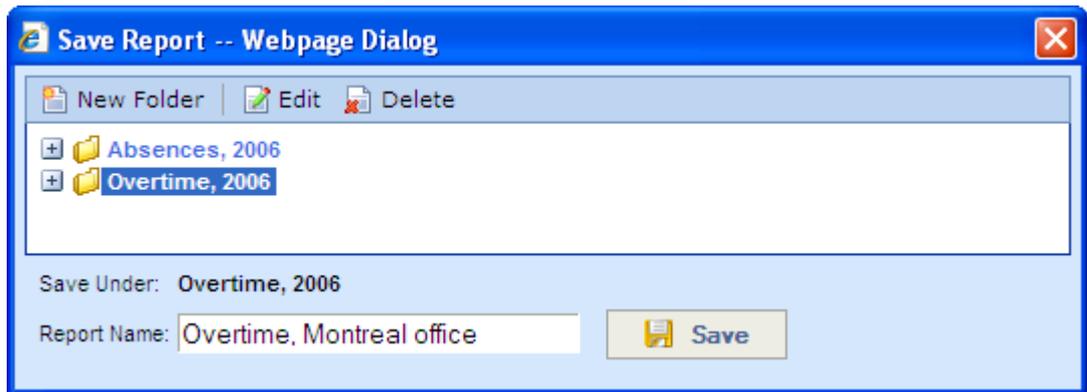
7. Click **Save**. The new Report Group folder (**Absences, 2006**) and the individual report that it contains appear in the **Custom Report** area in the **Shortcut** pane. Individual reports are designated by the  symbol.



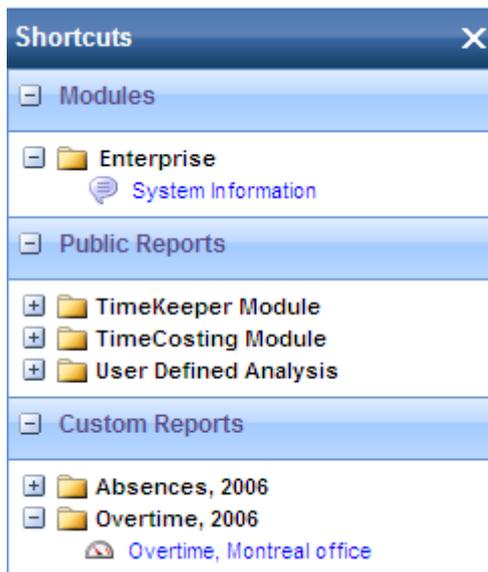
8. To add another report to this group, do as follows:
  - If there is only **one defined report group** in your system, click **Save As**, enter the report's name, and click **Save**. By default, the report is saved in that group, and appears as a sub-entry in the **Shortcut** pane.



9. If there are **multiple defined report groups**, click **Save As**, highlight the desired report group, enter the report's name, and click **Save**.

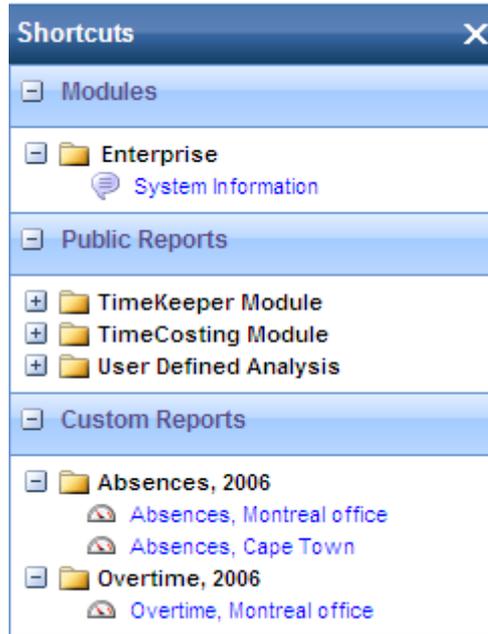


10. The report is saved in that group, and appears as a sub-entry in the **Shortcut** pane.

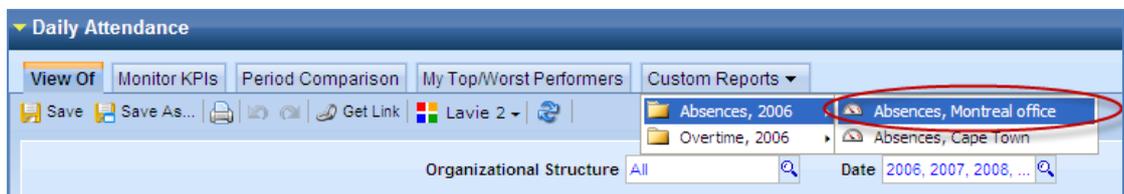


### Viewing Saved Reports

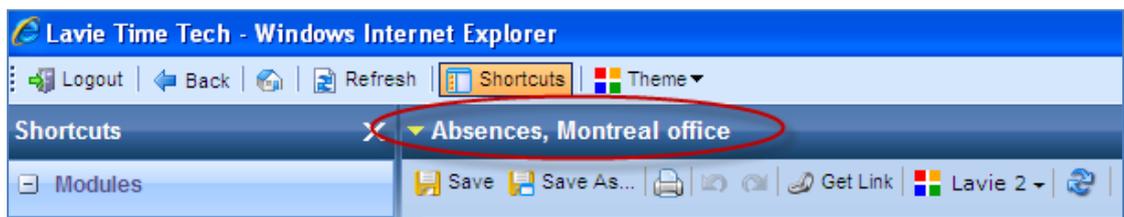
1. From the **Shortcut** pane, in **Custom Reports**, expand the plus sign in the folder where your report is found, and click the desired report.



2. Alternatively, click the arrow on the right side of the **Saved Reports** tab, and the names of the any folders/saved reports appear.



3. Regardless of the means, the report opens in the **Home** pane. The name of the report appears as the screen name.



### Modifying Saved Reports

1. To **modify the report**, do as follows:
  - a. Follow the steps in [Viewing Saved Reports](#) to find the report.
  - b. Make any necessary changes to KPIs, dates, categories, corporate hierarchies, etc,
  - c. Re-generate the graphs.

- d. Click **Save**.
2. To **edit a report's description or move the report to a different group**, do as follows:
  - a. Follow the steps in [Viewing Saved Reports](#) to find the report.
  - b. From the open report, click **Save As**.
  - c. From the **Save Report** screen, expand the hierarchy to find the report.
  - d. Select the report and click **Edit**. The **Private Report** screen appears.

- e. Change the name or description as desired.
- f. To move the report to a different report group, in the **Group** drop-down list, select the desired group.
- g. Click **Save**, and then click **Save** again from the **Save Report** screen.
3. To **edit a report group's description**, do as follows:
  - a. Follow the steps in [Viewing Saved Reports](#) to find any report in that report group.
  - b. Click **Save As**. The **Save Report** screen appears.
  - c. Highlight the desired report group and click **Edit**. The **Save Report Group** screen appears.
  - d. Modify the name or description as desired, and click **Save**.
4. To **delete a report group**, do as follows:
  - a. Follow the steps in [Viewing Saved Reports](#) to find any 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**.
5. To **delete a report from a report group**, do as follows:

**NOTE:** You can delete a report from a report group only if there are multiple reports in that group. If the report is the single report in that group, you must delete the entire report group.

- a. Follow the steps in [Viewing Saved Reports](#) to find any 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**.

## Analyzing Data from the TimeCosting Module

### Overview

This section describes how to view graphic representations of the job allocation and labour distribution data accumulated by the TimeCosting module.

**NOTE:** As was the case with the **Daily Attendance** and **Pay-Period Attendance** screens for the **TimeKeeping** Module, the **Daily Jobs** and **Pay Period Jobs** screens are similar in function, layout, and terminology. This section uses **Daily Jobs** as the primary example. Any differences between the two will be emphasized.

### Daily and Pay Period Jobs

This screen enables you to analyze job allocation and labor distribution data per daily records, with *daily* referring to date ranges of single days to multiples thereof.

To access the Daily Jobs screen, from the main screen, in the **TimeCosting Module** area, click **Period Jobs**. The **Daily Jobs** screen appears.

The screenshot shows the 'Daily Jobs' interface with a table titled 'Organizational Structure By Jobs (Summary)'. The table has three columns: 'Active Tasks', 'Non Active Tasks', and a third column with values. The data is as follows:

	Active Tasks	Non Active Tasks	
Chromasource	577,501,080.95	--	
inactive	72,044,710.59	2.00	
N/A --1	207,443,570.98	835.72	

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

The Daily Jobs screen is comprised of five possible subscreens: **View of, Monitor KPIs, Period Comparison, Profit Analysis – Billing vs. Cost**, and **My Top Worst/Performers**. Each subscreen is accessed by selecting the appropriate tab. A description of each subscreen follows. Choose the screen/s which suit your organizational needs and can represent your organizational goals.

### **View of Screen**

The **View of** screen (default) 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 corporate hierarchy. Key Performance Indicators (KPIs) are:

- Cost
- Duration
- Rates
- Quantities
- Pay Categories

Each of these KPIs contains further drill down options.

**NOTE:** In each screen, you must define **KPIs/Categories** or **Date**, or both.

### **Organizational Structure by Jobs (Summary)**

This screen displays all tasks per corporate hierarchy. You can filter by KPI or date in order to provide the manager/supervisor a quick-overview, at a glance, of all the jobs/tasks performed by his/her team.

Organizational Structure By Jobs (Summary)			Organizational Structure By Jobs (Detailed)	Jobs By Organization
Select KPIs / Categories <input type="text" value="All"/> <input type="button" value="🔍"/> Date <input type="text" value="All"/>				
	Active Tasks	Non Active Tasks		
⊕ Amano	1,164,623.29	--		
⊕ LTT	23,062,855.98	3,620.41		

Drill down for a close-up picture.

Organizational Structure By Jobs (Summary)			Organizational Structure By Jobs (Detailed)	Jobs By Organizational Structure (Summary)	Jobs By Organizational Structure (Detailed)							
Select KPIs / Categories <input type="text" value="All"/> <input type="button" value="🔍"/> Date <input type="text" value="All"/> <input type="button" value="🔍"/>												
	Active Tasks	ABSENCES (Non-Billable Hours)	ALTIMA A-Type	ALTIMA B-Type	ALTIMA C-Type	ALTIMA D-Type	ALTIMA E-Type	ELITE E 2000	ELITE E 3000	ELITE E 4000	ELITE E 5000	VAPORIZER SC 7300
⊕ Amano	12,965.04	30,787.84	982,685.13	6,759.91	11,310.13	4,981.80	11,889.31	6,656.79	10,514.44	13,285.89	10,145.89	8,57
⊕ LTT	382,413.21	648,161.66	10,295,974.66	442,106.94	3,589,973.30	849,716.44	1,186,861.81	463,426.29	487,125.07	464,334.35	482,506.00	352.08

Organizational Structure By Jobs (Summary)			Organizational Structure By Jobs (Detailed)	Jobs By Organizational Structure (Summary)					
Select KPIs / Categories <input type="text" value="All"/> <input type="button" value="🔍"/> Date <input type="text" value="All"/> <input type="button" value="🔍"/>									
	Active Tasks	ABSENCES (Non-Billable Hours)	ALTIMA A-Type	ALTIMA B-Type	ALTIMA C-Type	ALTIMA D-Type	ALTIMA E-Type	ELITE	
⊕ Amano	12,965.04	30,787.84	982,685.13	6,759.91	11,310.13	4,981.80	11,889.31		
⊕ LTT	⊕ CAPE TOWN	18,881.65	57,219.07	1,676,473.68	30,923.67	27,335.82	23,825.68	22,472.80	2
	⊕ HQ	321,943.18	523,934.21	8,571,693.23	370,885.33	3,521,350.87	784,093.81	1,126,495.16	38
	⊕ New York	28,946.98	40,879.26	34,525.36	29,062.04	24,932.01	25,519.35	23,700.60	2
	⊕ Toronto	12,641.40	26,129.12	13,282.40	11,235.90	16,354.60	16,277.60	14,193.25	1

**Organizational Structure by Jobs (Detailed)**

This screen expands on the previous screen by providing a reverse approach in greater detail. It displays all per corporate hierarchy - so you can see how many hours are contributed by each corporate unit to a specific job or group of jobs.

Organizational Structure By Jobs (Summary)		Organizational Structure By Jobs (Detailed)	
		Date <a href="#">All(+)</a>	
		⊕ Active Tasks	⊕ Non Active Tasks
⊕ Amano	⊕ Calculated Measures	1.00	--
	⊕ Costs	999,525.73	--
	⊕ Duration	12,507.87	--
	⊕ Profit (calculated)	--	--
	⊕ Quantities	25,158.00	--
	⊕ Quantities (Calculated)	--	--
	⊕ Rates	114,715.85	--
	⊕ Pay Categories	12,715.85	--
⊕ LTT	⊕ Calculated Measures	22.00	4.00
	⊕ Costs	19,394,820.33	2,776.41
	⊕ Duration	248,442.06	112.00
	⊕ Profit (calculated)	--	--
	⊕ Quantities	413,629.00	247.00
	⊕ Quantities (Calculated)	--	--
	⊕ Rates	2,760,302.90	362.50
	⊕ Pay Categories	245,661.69	122.50
⊖ NA --1	⊕ NA --1	⊕ Profit (calculated)	--
		⊕ Quantities (Calculated)	--

Drill down for a close-up picture.

Organizational Structure By Jobs (Summary)		Organizational Structure By Jobs (Detailed)		
Date <input type="text" value="All[+]"/>				
		<input checked="" type="checkbox"/> Active Tasks	<input checked="" type="checkbox"/> Non Active Tasks	
<input checked="" type="checkbox"/> Amano	<input checked="" type="checkbox"/> Calculated Measures	1.00	--	
	<input checked="" type="checkbox"/> Costs	999,525.73	--	
	<input checked="" type="checkbox"/> Duration	12,507.87	--	
	<input checked="" type="checkbox"/> Profit (calculated)	--	--	
	<input type="checkbox"/> Quantities	Qty Bad	743.00	--
		Qty Good	24,415.00	--
	<input checked="" type="checkbox"/> Quantities (Calculated)	--	--	
	<input checked="" type="checkbox"/> Rates	114,715.85	--	
<input checked="" type="checkbox"/> Pay Categories	12,715.85	--		
<input checked="" type="checkbox"/> LTT	<input checked="" type="checkbox"/> Calculated Measures	22.00	4.00	
	<input checked="" type="checkbox"/> Costs	19,394,820.33	2,776.41	
	<input checked="" type="checkbox"/> Duration	248,442.06	112.00	
	<input checked="" type="checkbox"/> Profit (calculated)	--	--	
	<input type="checkbox"/> Quantities	Qty Bad	14,442.00	7.00
		Qty Good	399,187.00	240.00
	<input checked="" type="checkbox"/> Quantities (Calculated)	--	--	
	<input checked="" type="checkbox"/> Rates	2,760,302.90	362.50	
<input checked="" type="checkbox"/> Pay Categories	245,661.69	122.50		
<input type="checkbox"/> NA	<input checked="" type="checkbox"/> Profit (calculated)	--	--	
--1	<input checked="" type="checkbox"/> Quantities (Calculated)	--	--	

Organizational Structure By Jobs (Summary)		Organizational Structure By Jobs (Detailed)		Jobs By Organizational Structure (Summary)					
Date <input type="text" value="All[+]"/> <input type="button" value="Q"/>									
		<input checked="" type="checkbox"/> Active Tasks							
		ABSENCES (Billable Hours)	ABSENCES (Non-Billable Hours)	ALTIMA A-Type	ALTIMA B-Type	ALTIMA C-Type	ALTIMA D-Type	ALTIMA E-Type	
<input checked="" type="checkbox"/> Amano	<input checked="" type="checkbox"/> Calculated Measures	1.00	1.00	1.00	1.00	1.00	1.00	1.00	
	<input checked="" type="checkbox"/> Costs	11,144.02	26,228.62	842,545.37	5,737.08	9,805.03	4,314.40	10,257.44	
	<input checked="" type="checkbox"/> Duration	158.95	374.75	10,473.73	81.42	117.69	51.07	125.80	
	<input checked="" type="checkbox"/> Profit (calculated)	--	--	--	--	--	--	--	
	<input type="checkbox"/> Quantities	Qty Bad	9.00	27.00	635.00	6.00	6.00	3.00	5.00
		Qty Good	340.00	720.00	20,492.00	165.00	220.00	73.00	229.00
	<input checked="" type="checkbox"/> Quantities (Calculated)	--	--	--	--	--	--	--	
	<input checked="" type="checkbox"/> Rates	1,154.30	3,055.50	97,868.40	700.20	1,038.70	487.20	1,155.00	
<input checked="" type="checkbox"/> Pay Categories	158.77	381.97	10,670.63	70.22	122.72	53.13	117.07		
<input checked="" type="checkbox"/> LTT	<input checked="" type="checkbox"/> Calculated Measures	22.00	22.00	22.00	22.00	22.00	22.00	22.00	
	<input checked="" type="checkbox"/> Costs	319,212.51	537,897.88	8,736,987.26	371,010.41	2,983,317.51	681,442.79	1,005,702.24	
	<input checked="" type="checkbox"/> Duration	4,808.47	8,052.60	109,754.87	4,944.62	36,714.30	8,172.15	11,573.65	
	<input checked="" type="checkbox"/> Profit (calculated)	--	--	--	--	--	--	--	
	<input type="checkbox"/> Quantities	Qty Bad	342.00	496.00	5,716.00	328.00	2,271.00	531.00	503.00
		Qty Good	8,715.00	12,807.00	161,184.00	9,089.00	61,408.00	11,195.00	13,792.00
	<input checked="" type="checkbox"/> Quantities (Calculated)	--	--	--	--	--	--	--	
	<input checked="" type="checkbox"/> Rates	44,748.30	81,217.80	1,172,128.30	52,094.50	469,480.40	140,455.60	143,942.50	
<input checked="" type="checkbox"/> Pay Categories	4,586.93	7,690.38	110,204.24	4,640.41	36,782.08	7,919.90	11,348.42		
<input type="checkbox"/> NA	<input checked="" type="checkbox"/> Profit (calculated)	--	--	--	--	--	--	--	
--1	<input checked="" type="checkbox"/> Quantities (Calculated)	--	--	--	--	--	--	--	

### Jobs by Organizational Structure (Summary)

Both this screen, and the following screen, are actually the reverse of the first two screens. It displays all corporate hierarchies per active and non-active tasks. You can filter by KPI or date.

Organizational Structure By Jobs (Summary)		Organizational Structure By Jobs (Detailed)		Jobs By Organizational Structure (Summary)	
Select KPIs / Categories				All	Date All
	<input checked="" type="checkbox"/> Amano	<input checked="" type="checkbox"/> LTT			
<input checked="" type="checkbox"/> Active Tasks	1,164,623.2	23,062,855.98			
<input checked="" type="checkbox"/> Non Active Tasks	--	3,620.41			

Drill down for a close-up picture.

Organizational Structure By Jobs (Summary)		Organizational Structure By Jobs (Detailed)		Jobs By Organizational Structure (Summary)	
Select KPIs / Categories				All	Date All
	<input checked="" type="checkbox"/> Amano	<input checked="" type="checkbox"/> LTT			
<input checked="" type="checkbox"/> Active Tasks	ABSENCES (Billable Hours)	12,965.04	382,413.21		
	ABSENCES (Non-Billable Hours)	30,787.84	648,161.66		
	ALTIMA A-Type	982,685.13	10,295,974.66		
	ALTIMA B-Type	6,759.91	442,106.94		
	ALTIMA C-Type	11,310.13	3,589,973.30		
	ALTIMA D-Type	4,981.80	849,716.44		
	ALTIMA E-Type	11,889.31	1,186,861.81		
	ELITE E 2000	6,656.79	463,426.29		
	ELITE E 3000	10,514.44	487,125.07		
	ELITE E 4000	13,285.89	464,334.35		
	ELITE E 5000	10,145.89	482,506.00		
	VAPORIZER SD 7300	8,573.07	352,082.60		
	VAPORIZER SE 7400	8,457.56	383,363.54		
	VAPORIZER SV 7200	7,602.83	291,652.16		
	VENUS E 5000	6,792.87	1,065,606.87		
	VENUS E 6000	11,230.99	1,264,374.86		
	VENUS E 7000	19,983.82	413,176.24		
<input checked="" type="checkbox"/> Non Active Tasks		--	3,620.41		

Organizational Structure By Jobs (Summary)		Organizational Structure By Jobs (Detailed)		Jobs By Organizational Structure (Summary)		
Select KPIs / Categories				All	Date All	
	<input checked="" type="checkbox"/> Amano	<input checked="" type="checkbox"/> LTT				
	<input checked="" type="checkbox"/> CAPE TOWN	<input checked="" type="checkbox"/> HQ	<input checked="" type="checkbox"/> New York	<input checked="" type="checkbox"/> Toronto		
<input checked="" type="checkbox"/> Active Tasks	ABSENCES (Billable Hours)	12,965.04	18,881.65	321,943.18	28,946.98	12,641.40
	ABSENCES (Non-Billable Hours)	30,787.84	57,219.07	523,934.21	40,879.26	26,129.12
	ALTIMA A-Type	982,685.13	1,676,473.68	8,571,693.2	34,525.36	13,282.40
	ALTIMA B-Type	6,759.91	30,923.67	370,885.33	29,062.04	11,235.90
	ALTIMA C-Type	11,310.13	27,335.82	3,521,350.8	24,932.01	16,354.60
	ALTIMA D-Type	4,981.80	23,825.68	784,093.81	25,519.35	16,277.60
	ALTIMA E-Type	11,889.31	22,472.80	1,126,495.1	23,700.60	14,193.25
	ELITE E 2000	6,656.79	29,834.69	388,908.07	26,834.33	17,849.20
	ELITE E 3000	10,514.44	25,101.45	417,829.31	26,556.01	17,638.30
	ELITE E 4000	13,285.89	36,142.28	384,952.96	29,550.11	13,689.01
	ELITE E 5000	10,145.89	23,892.33	406,438.19	31,041.59	21,133.89
	VAPORIZER SD 7300	8,573.07	22,114.60	291,902.50	27,975.80	10,089.70
	VAPORIZER SE 7400	8,457.56	21,985.86	325,914.03	22,890.80	12,572.85
	VAPORIZER SV 7200	7,602.83	16,022.50	241,883.39	17,971.17	15,775.10
	VENUS E 5000	6,792.87	23,374.18	278,854.58	22,250.49	741,127.61
	VENUS E 6000	11,230.99	25,684.03	365,298.41	859,842.54	13,549.88
	VENUS E 7000	19,983.82	21,572.98	355,835.21	19,850.05	15,918.00
<input checked="" type="checkbox"/> Non Active Tasks		--	2,835.41	491.00	--	294.00

### Jobs by Organizational Structure (Detailed)

This screen expands on the previous screen by providing a more detail-based approach. It displays all corporate hierarchies 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.

		Amano	LTT
Active	Costs	999,525.73	19,394,820.33
Tasks	Duration	12,507.87	248,442.06
	Quantities	25,158.00	413,629.00
	Rates	114,715.85	2,760,302.90
	Pay Categories	12,715.85	245,661.69
	Non Active	Costs	--
Tasks	Duration	--	112.00
	Quantities	--	247.00
	Rates	--	362.50
	Pay Categories	--	122.50

		Amano	LTT	
Active	Costs	999,525.73	19,394,820.33	
Tasks	Duration	12,507.87	248,442.06	
	Quantities	25,158.00	413,629.00	
	Rates	114,715.85	2,760,302.90	
	Pay Categories	12,715.85	245,661.69	
	Non	Costs	--	2,776.41
Active	Duration	--	112.00	
	Tasks	Quantities	--	247.00
	Rates	--	362.50	
	Pay Categories	--	122.50	

Drill down for a close-up picture.

		⊕ Amano	⊕ LTT	
⊕ Active Tasks	⊕ Costs	999,525.73	19,394,820.33	
	⊕ Duration	12,507.87	248,442.06	
	⊖ Quantities	Qty Bad	743.00	14,442.00
		Qty Good	24,415.00	399,187.00
	⊕ Rates	114,715.85	2,760,302.90	
⊕ Pay Categories	12,715.85	245,661.69		
⊕ Non Active Tasks	⊕ Costs	--	2,776.41	
	⊕ Duration	--	112.00	
	⊖ Quantities	Qty Bad	--	7.00
		Qty Good	--	240.00
	⊕ Rates	--	362.50	
⊕ Pay Categories	--	122.50		

		⊕ Amano	⊖ LTT	⊕ CAPE TOWN	⊕ HQ	⊕ New York	⊕ Toronto
⊕ Active Tasks	⊕ Costs	999,525.73	1,779,531.69	15,679,130.	1,097,811.00	838,347.24	
	⊕ Duration	12,507.87	23,213.10	200,028.96	12,609.28	12,590.72	
	⊖ Quantities	Qty Bad	743.00	1,531.00	11,401.00	743.00	767.00
		Qty Good	24,415.00	43,513.00	307,836.00	22,882.00	24,956.00
	⊕ Rates	114,715.85	232,052.85	2,282,748.1	145,366.90	100,135.05	
⊕ Pay Categories	12,715.85	23,015.61	197,067.99	12,916.29	12,661.81		
⊕ Non Active Tasks	⊕ Costs	--	2,136.41	400.00	--	240.00	
	⊕ Duration	--	88.00	16.00	--	8.00	
	⊖ Quantities	Qty Bad	--	6.00	1.00	--	--
		Qty Good	--	224.00	8.00	--	8.00
	⊕ Rates	--	282.50	50.00	--	30.00	
⊕ Pay Categories	--	98.50	16.00	--	8.00		

## **Monitor KPIs**

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

Key Performance Indicators (KPIs) are metrics that you use to evaluate how successful your corporate hierarchy is and determine the progress made towards your organizational goals.

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

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

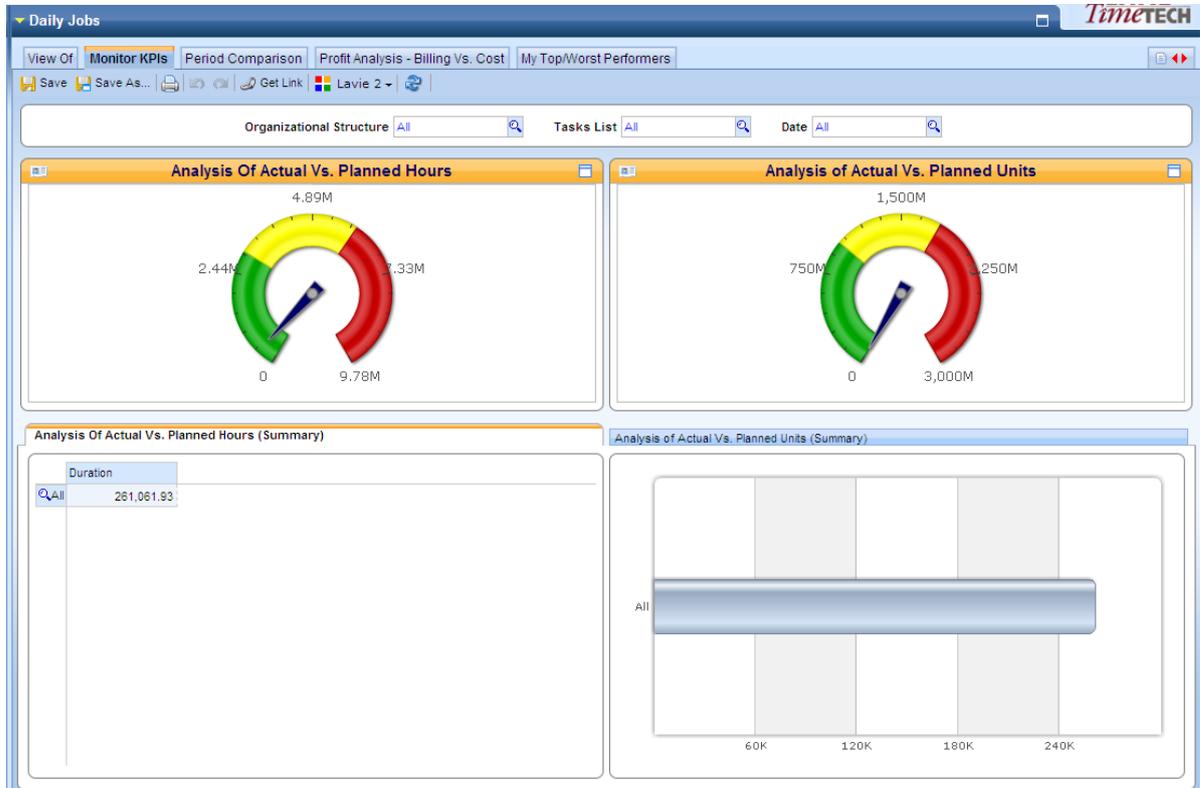
Unlike attendance KPIs defined in the previous sections (see [Monitor KPIs](#) for TimeKeeping), these KPIs are the default and cannot be changed. Each KPI separates its data into three numeric ranges of acceptability – colorfully displayed by default as red (unacceptable), yellow (borderline), and green (acceptable), although you can define different colors per range.

Additionally, 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 corporate hierarchy and period
- A graphic column representation of that numeric chart

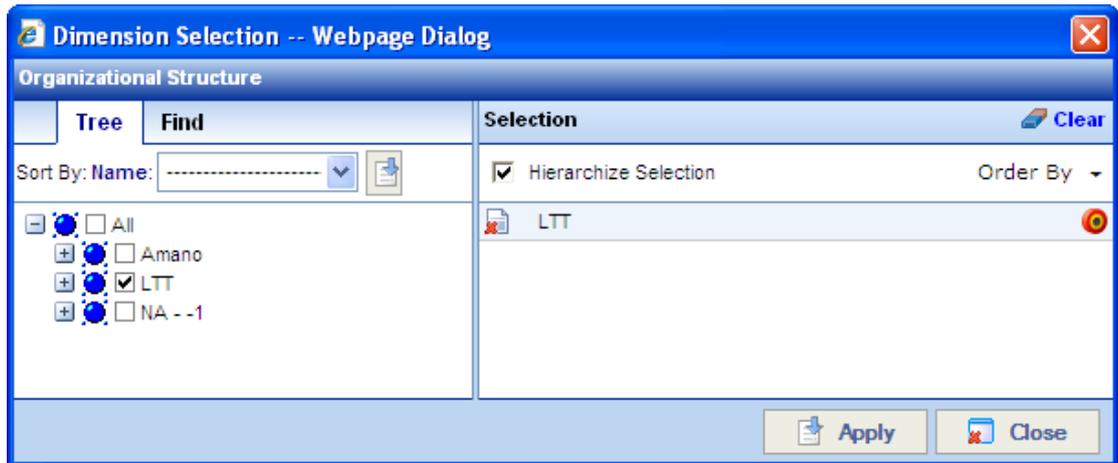
To work with the Monitor KPIs, do as follows:

1. Click the **Monitor KPIs** tab. The **Monitor KPIs** screen appears, configured to the default settings (**NOTE**: these differ per customer):

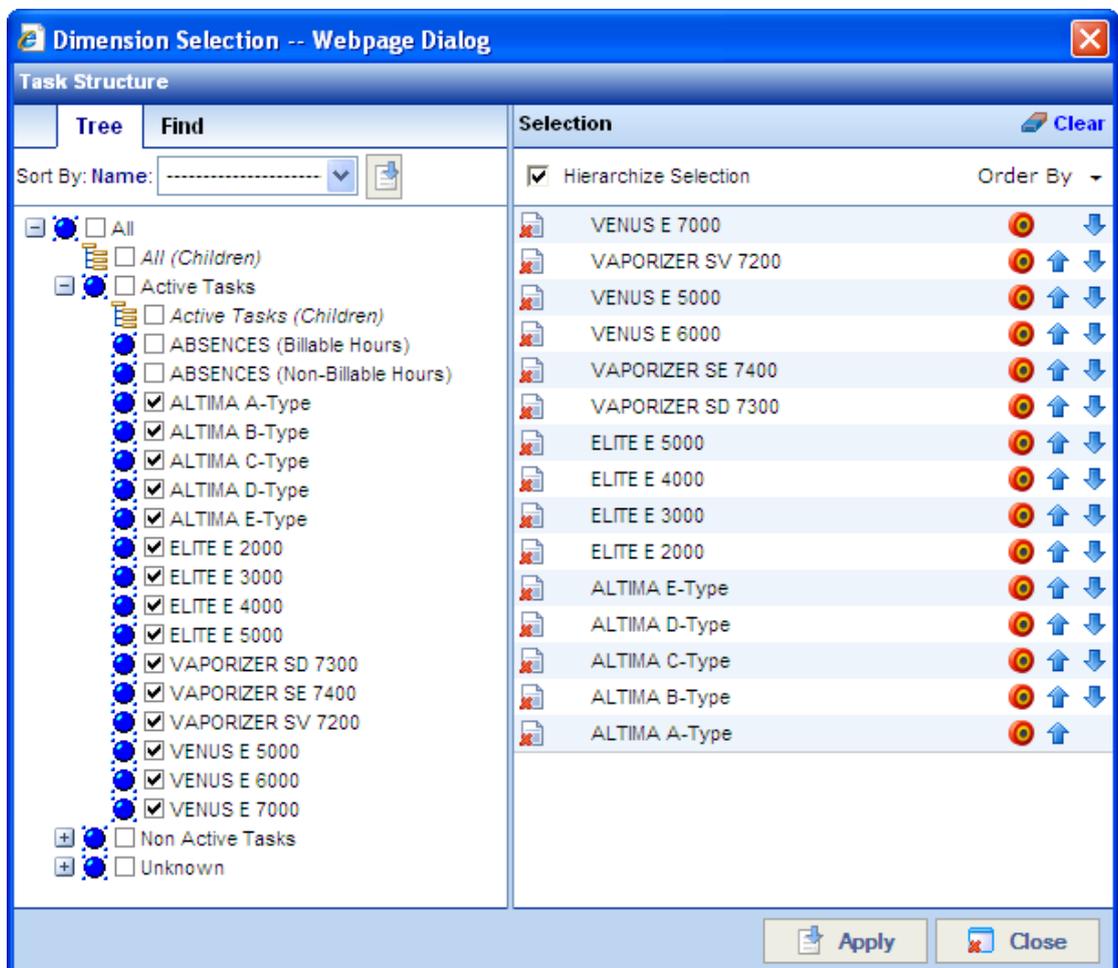


<p><b>Actual vs. Planned Hours (Summary)</b></p>	<p>Both this dashboard, and its accompanying graph, contrast the allocated <i>hours</i> per project to the actual number of hours used for the task's implementation.</p>
<p><b>Actual vs. Planned Units (Summary)</b></p>	<p>Both this dashboard, and its accompanying graph, contrast the allocated <i>units</i> per project to the actual number of units used. These units can differ per company; for example, they can refer to resources, manpower, or amount of produced merchandise.</p>

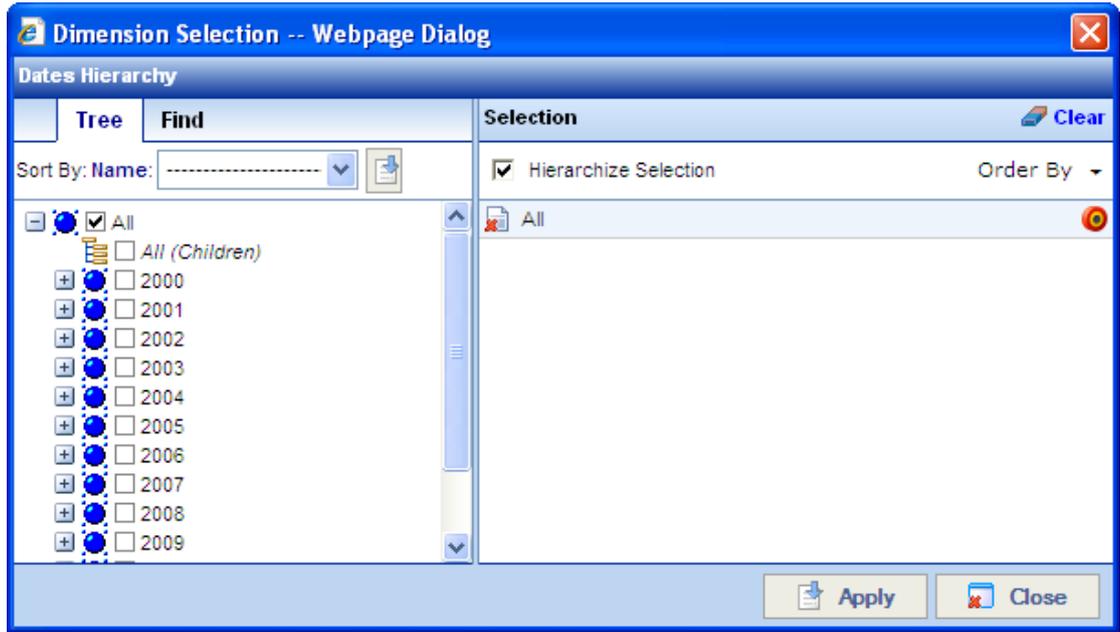
2. In **Organizational Structure**, select the corporate hierarchy whose task allocation you want to analyze. **NOTE**: Initial selections may already impact the remaining KPI dashboard settings.



- In **Tasks List**, select the tasks. The main selections are **active**, **non-active**, and **unknown**. Drill down to specific tasks if necessary.

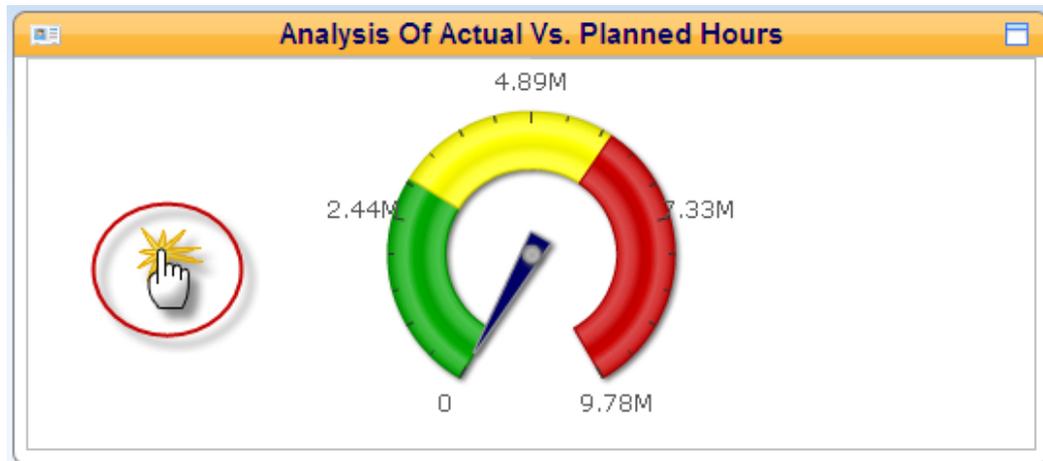


- In **Date**, select the date for your analysis.

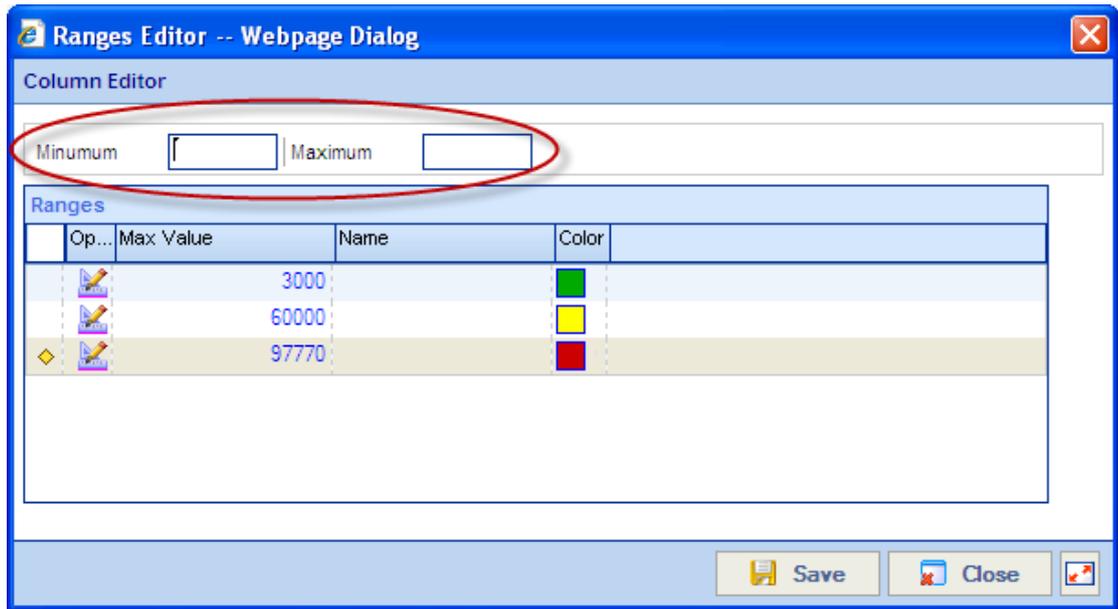


**NOTE:** The period selections in **Pay-Period Attendance** are *weekly, bi-weekly, monthly, and bi-monthly*.

5. Click once on any dashboard, as shown here.



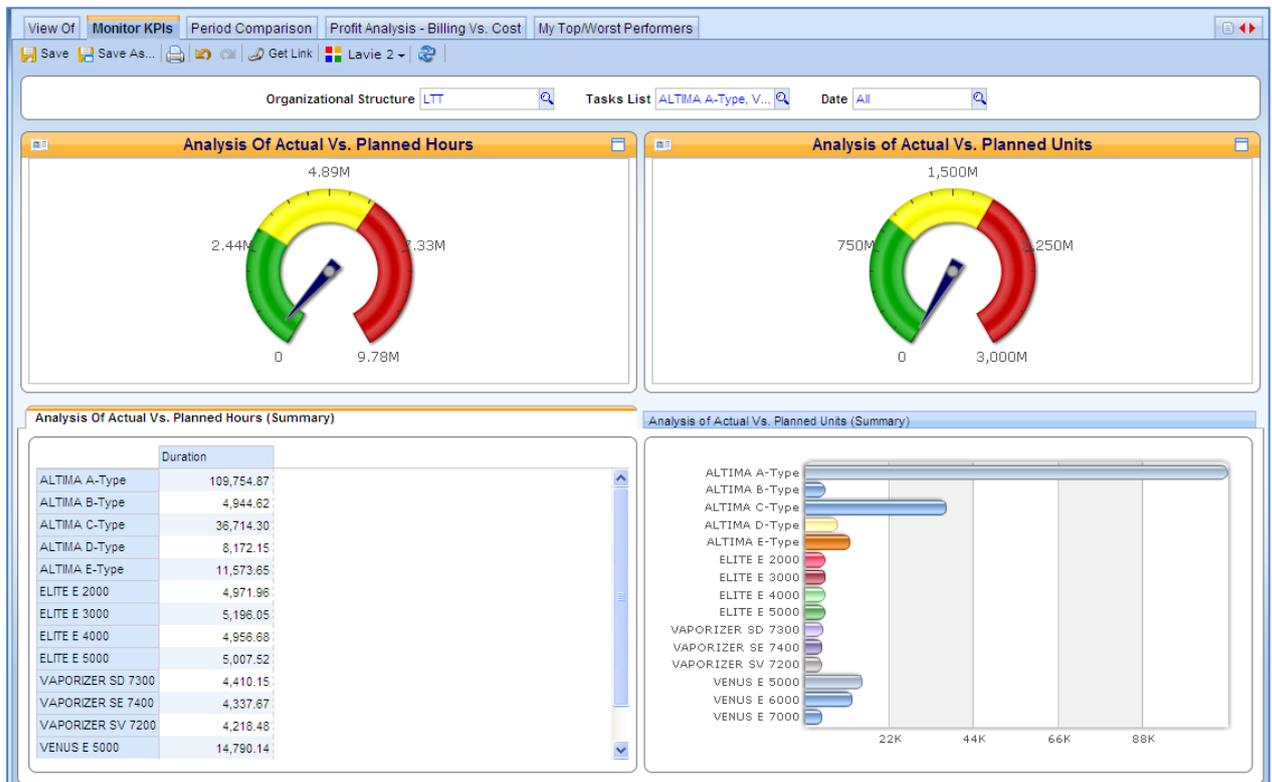
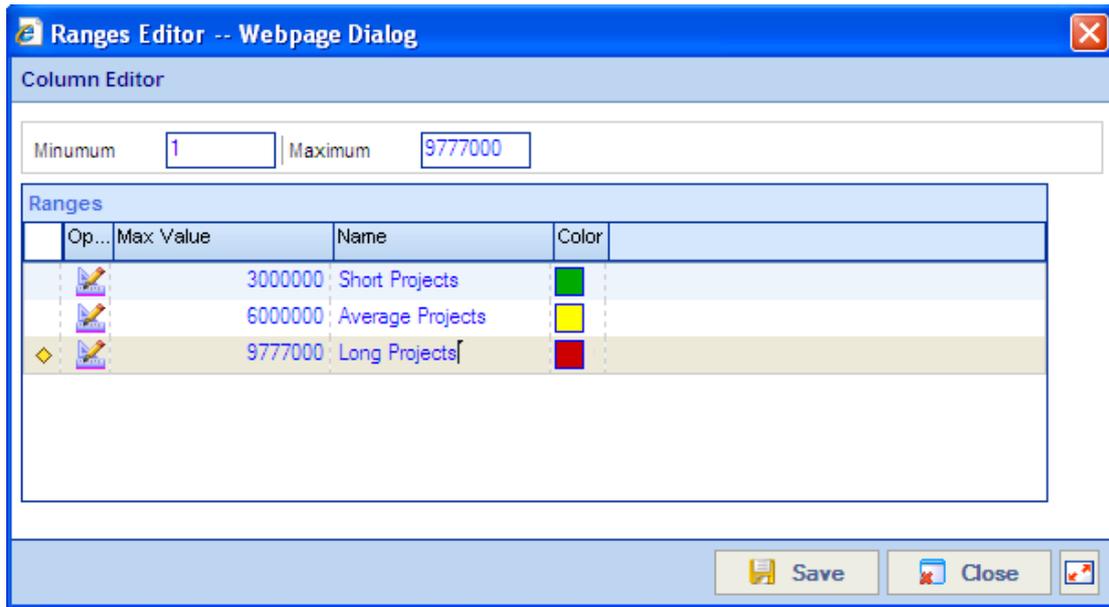
6. The **Ranges Editor** screen appears. In the **Minimum** and **Maximum** entry boxes at the top, set the overall range, for example, 0-10,000,000. Whether you select *hours* or *units*, the value you enter in Maximum should realistically represent the planned amount of hours/units.



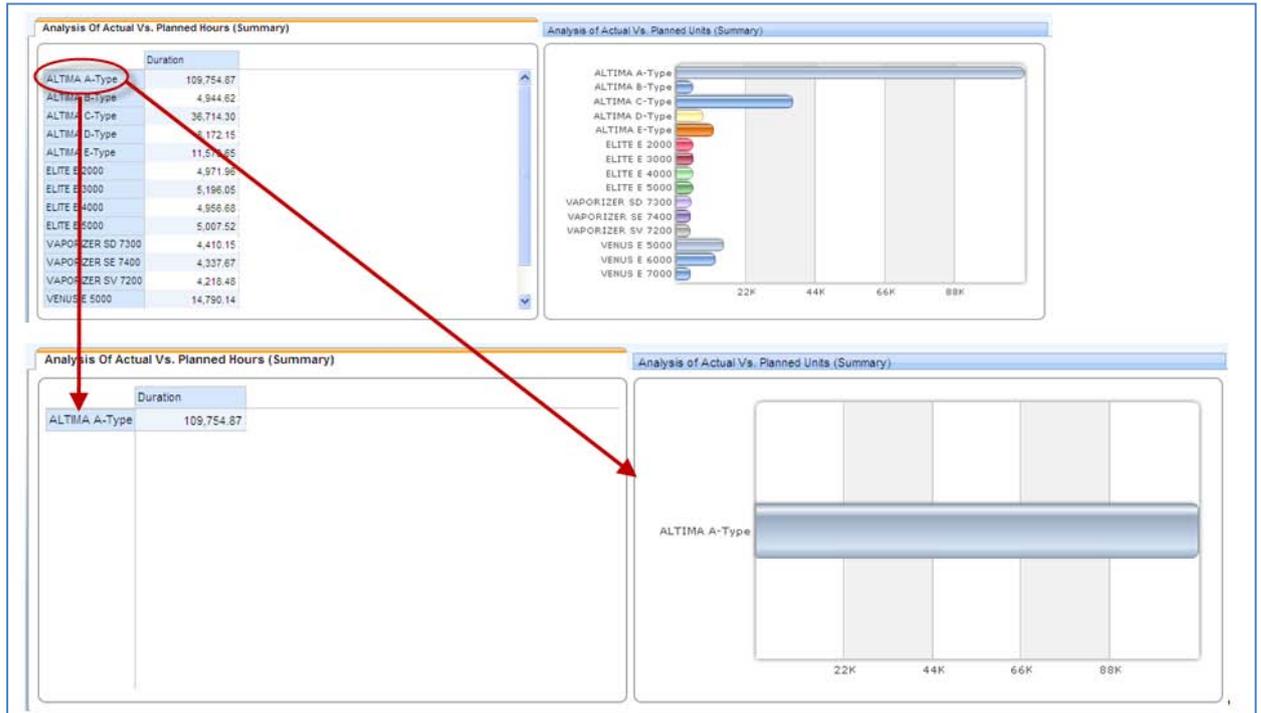
**NOTE:** It is recommended to enter a maximum value slightly higher than the real standard determined by the corporate hierarchy.

- 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.
- 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.

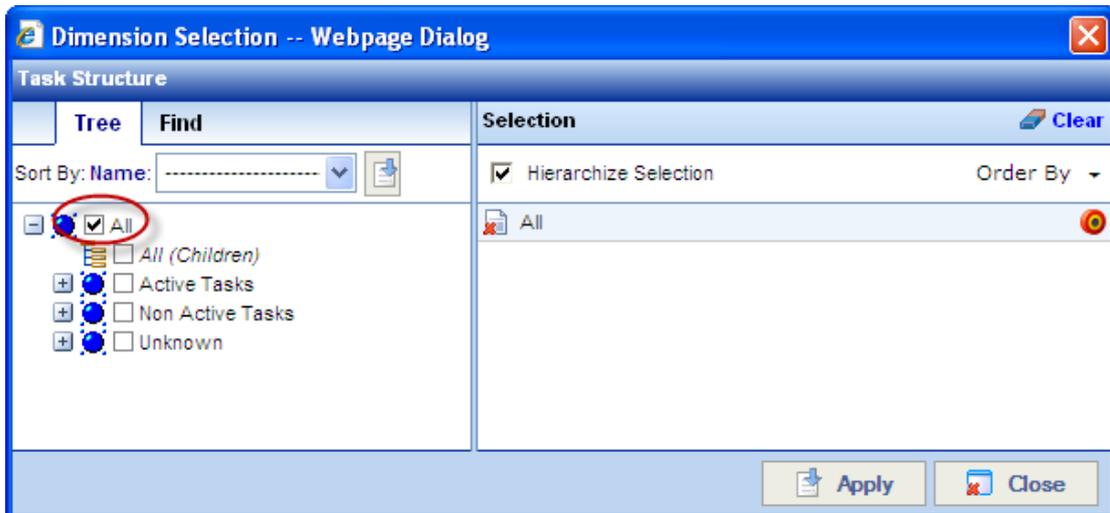
The following shows the total hours of selected active projects in the LTT corporate hierarchy. The **Actual vs. Planned Hours (Detailed)** area at the bottom of the screen displays the total duration of all selected projects in both numeric form (on the left) and in graphic form (on the right).

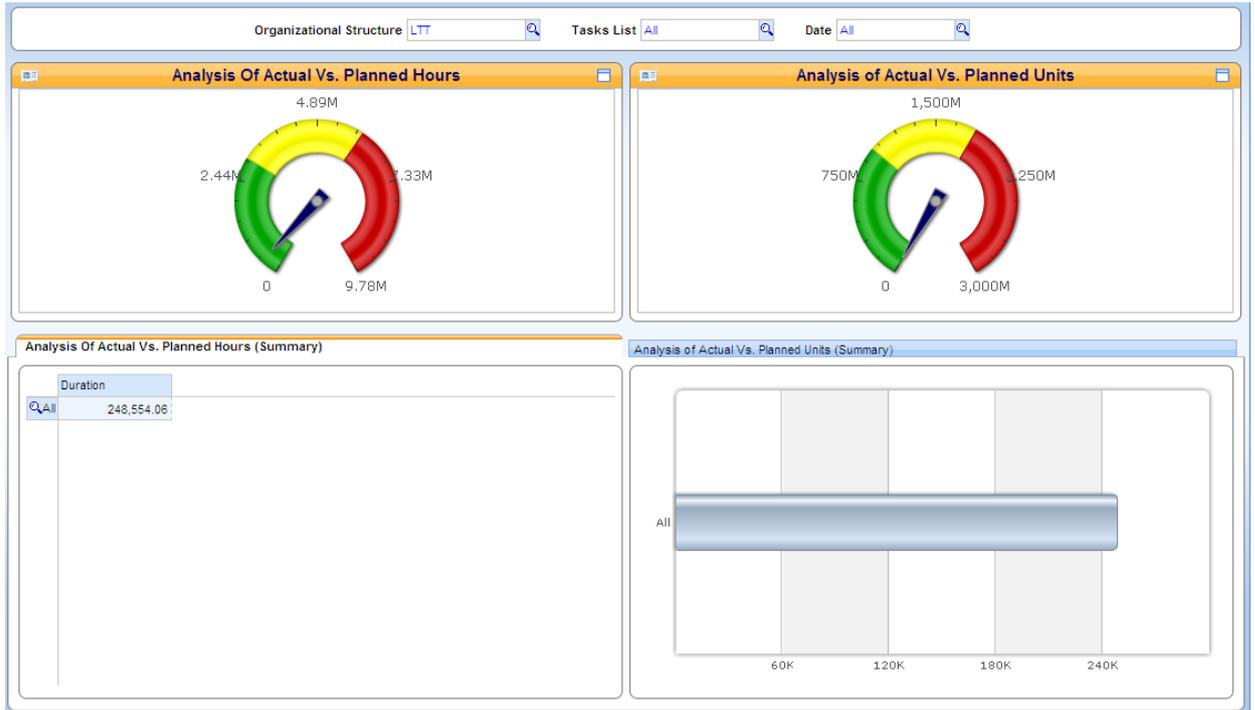


- g. To drill down per task/project, click any that task from the far left. This also impacts the bottom graph on the right.

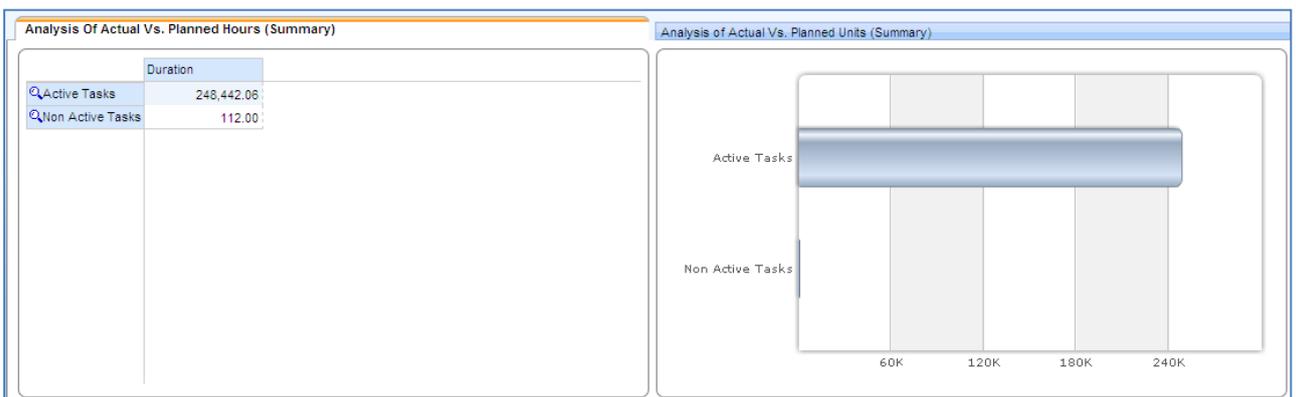
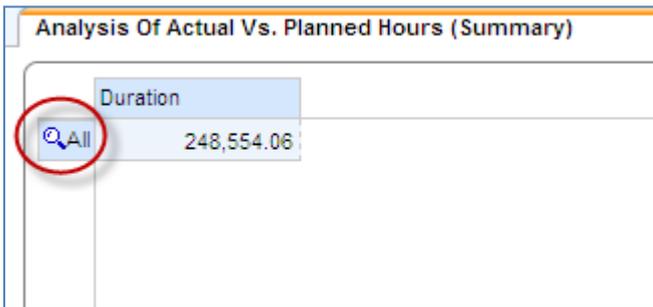


h. Alternatively, if you select all from **Tasks List**, it would appear as follows:





i. Click **All** to access an analysis of active tasks vs. non-active tasks.



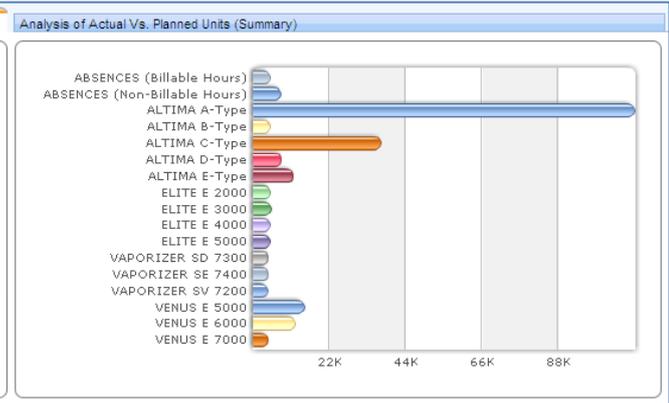
j. Select either for a further drill down analysis.

**Analysis Of Actual Vs. Planned Hours (Summary)**

	Duration
Active Tasks	248,442.06
Non Active Tasks	112.00

**Analysis Of Actual Vs. Planned Hours (Summary)**

	Duration
ABSENCES (Billable Hours)	4,808.47
ABSENCES (Non-Billable Hours)	8,052.60
ALTIMA A-Type	109,754.87
ALTIMA B-Type	4,944.62
ALTIMA C-Type	36,714.30
ALTIMA D-Type	8,172.15
ALTIMA E-Type	11,573.65
ELITE E 2000	4,971.96
ELITE E 3000	5,196.05
ELITE E 4000	4,956.68
ELITE E 5000	5,007.52
VAPORIZER SD 7300	4,410.15
VAPORIZER SE 7400	4,337.67



6. Optionally, repeat entire procedure for the other KPI dashboard.
7. Click any of the other tabs to continue your analysis.
8. To return to the main screen, from the main toolbar, click **Home** .

## Period Comparison

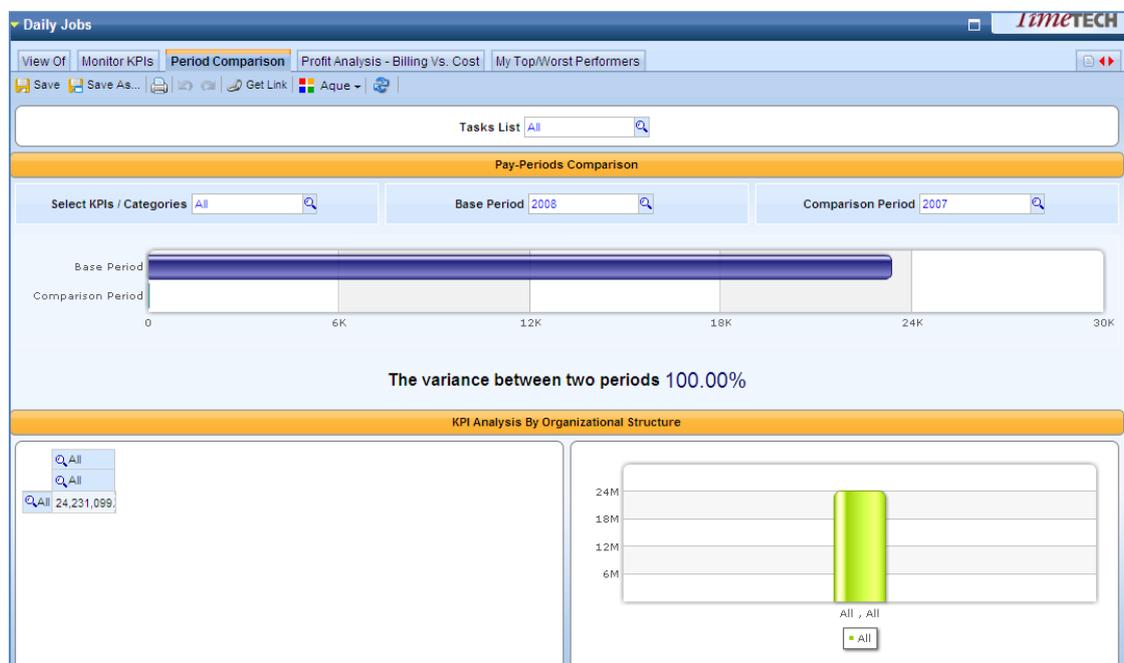
This screen enables you to compare daily tasks and labor allocation data from two separate periods according to costs, duration, quantities, rates, and pay categories.

For example, by using **Period Comparison**, you can view the following:

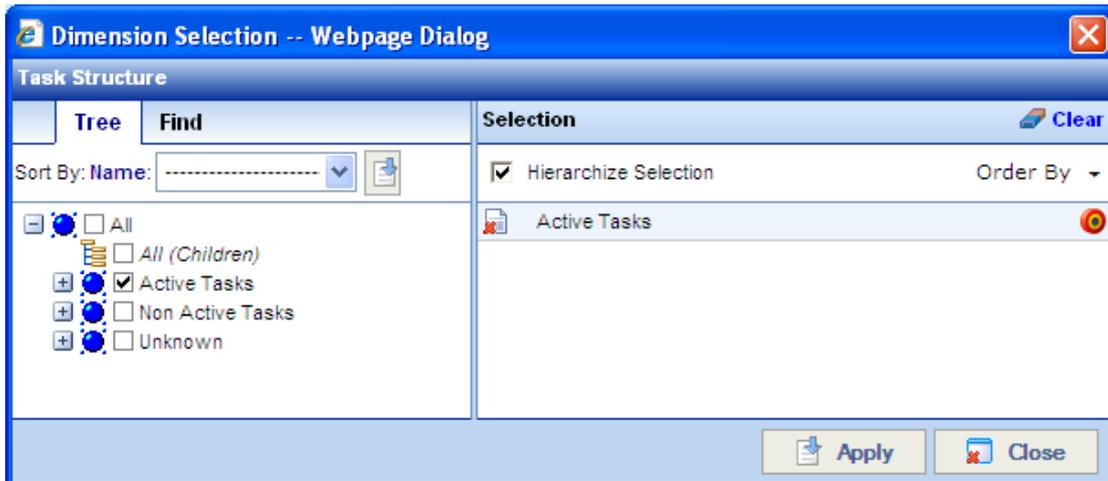
- Compare project duration over two separate years for the entire corporate hierarchy
- Compare task cost over two consecutive quarters for a specific department
- Compare quantities over two months for a specific employee

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

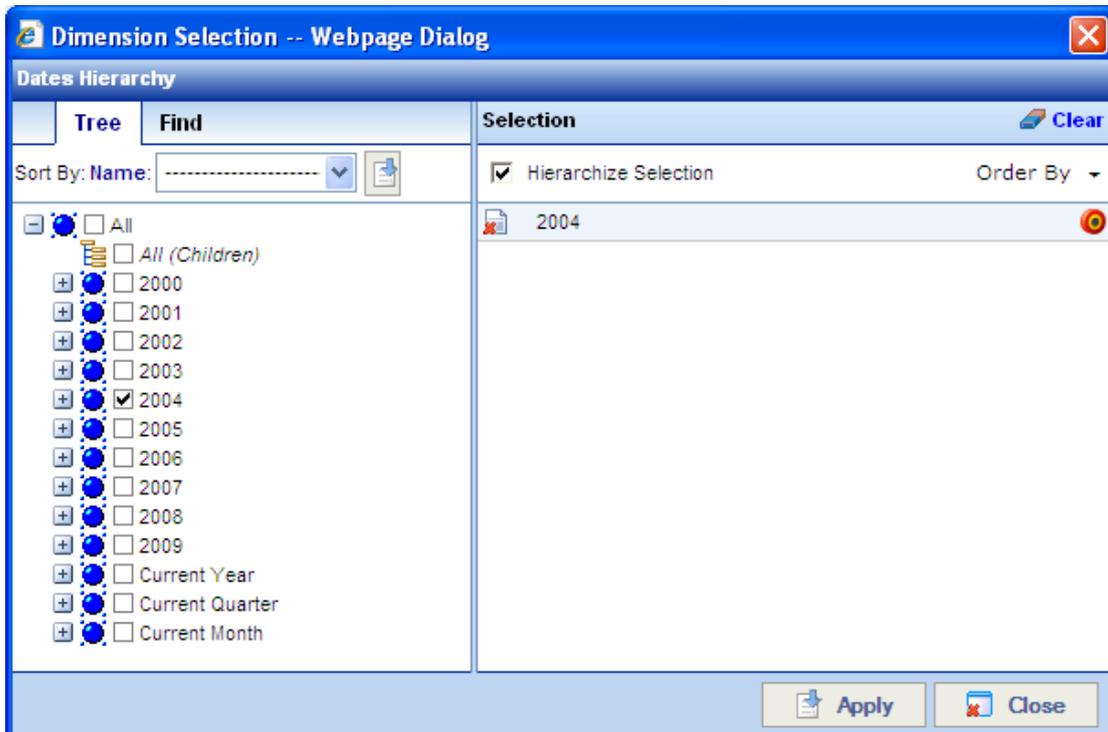
1. Click the **Period Comparison** tab. The **Period Comparison** screen appears.



2. In **Tasks List**, click the **Find** button. The **Dimension Selection** screen appears.
  - a. Select the tasks you want to display. The selections are *active*, *non-active*, and *unknown*. Expand the hierarchy to drill down, if necessary.



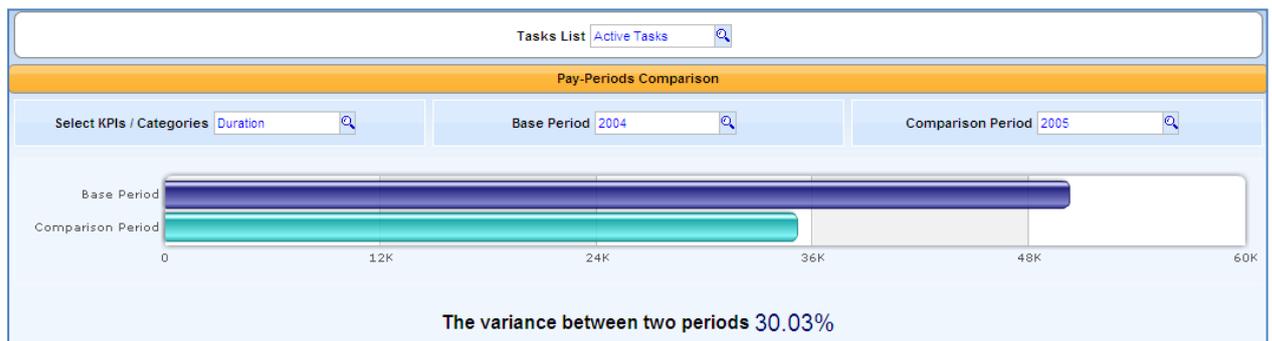
- b. Click **Apply** when done. To exit without saving, click **Close**.
3. In **Base Period** and **Comparison Period**, click the **Find**  button. The **Dimension Selection** screen appears.
  - a. In **Base Period**, select the main period – in other words, the period you want to drill down from later (see below) – and in **Comparison Period**, select a comparison period to display. Expand the hierarchy to drill down, if necessary.



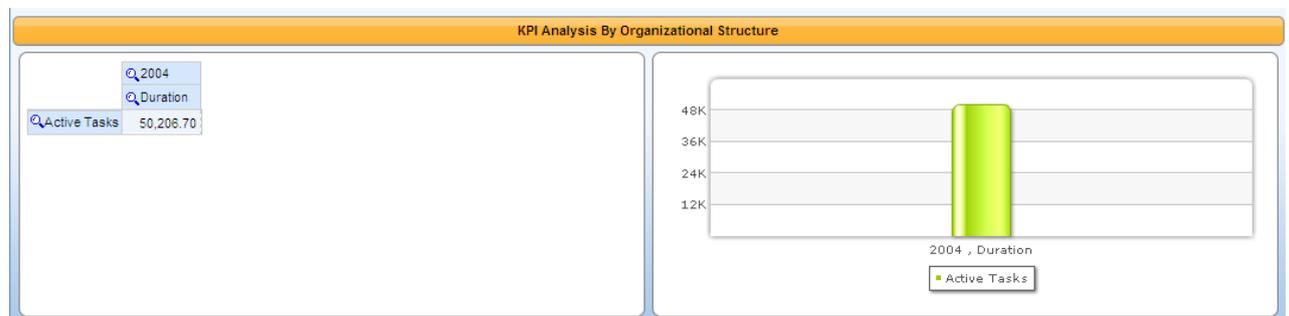
**NOTE:** The period selections in **Pay-Period Attendance** are *weekly, bi-weekly, monthly, and bi-monthly*.

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

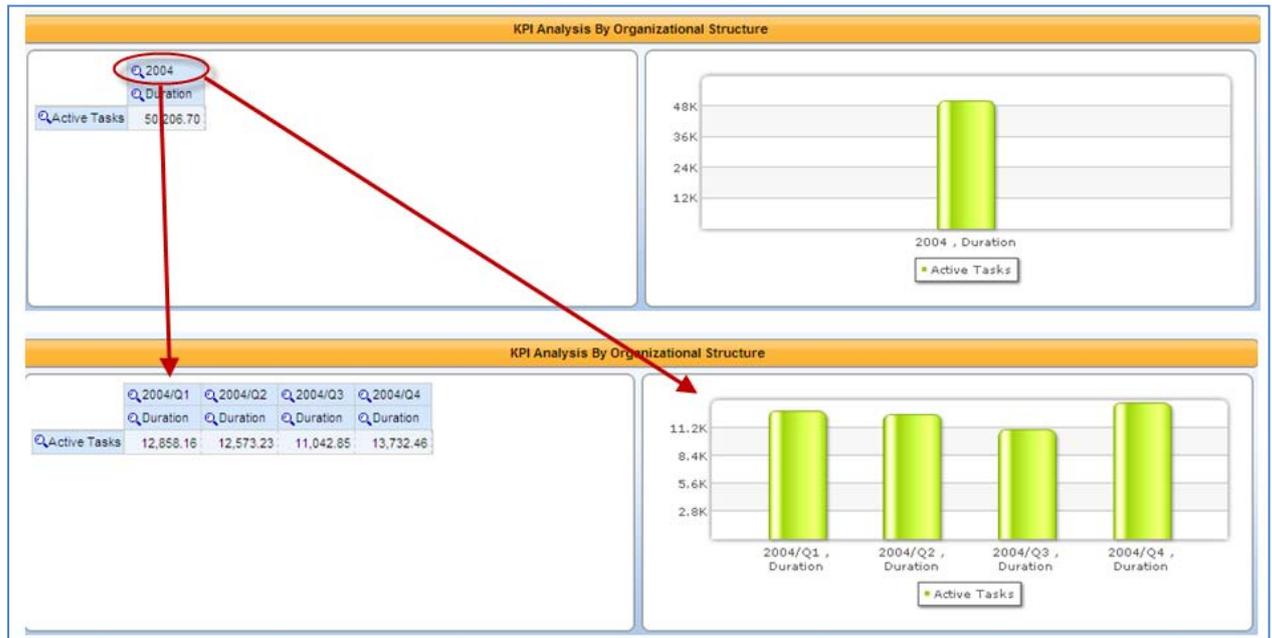
Defining the dates generates the comparison graph, accompanied by a value representing the difference between the two defined periods:



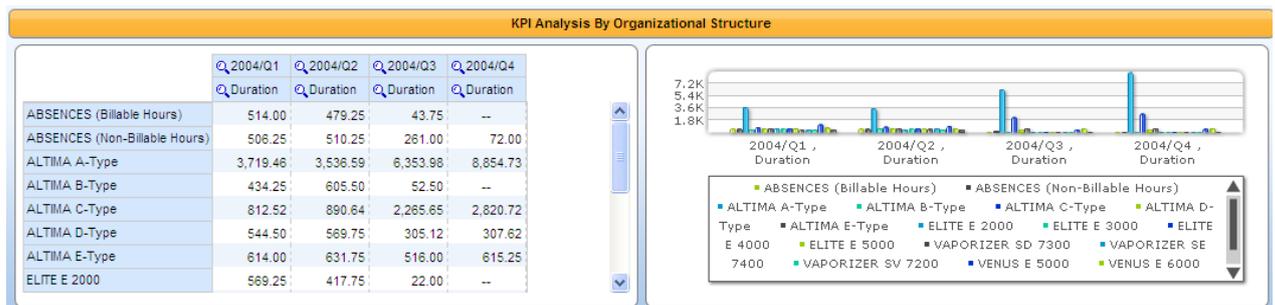
The **KPI Analysis by Organizational Structure** area at the bottom of the screen displays the following:



- On the **left** side, the graph displays active tasks' duration for the selected year in numeric form
  - On the **right** side, the graph displays active tasks' duration for the selected year in graphic form
4. To drill down, click any of the **Find**  icons on the bottom left to select a KPI (alternatively, click the columns on the far right). For example, clicking **2004** on the far left displays an analysis by quarterly periods. Note that this process also impacts the bar graph:



5. Click **Active Tasks** to view a quarterly analysis by active tasks.



6. Continue to drill down if needed.

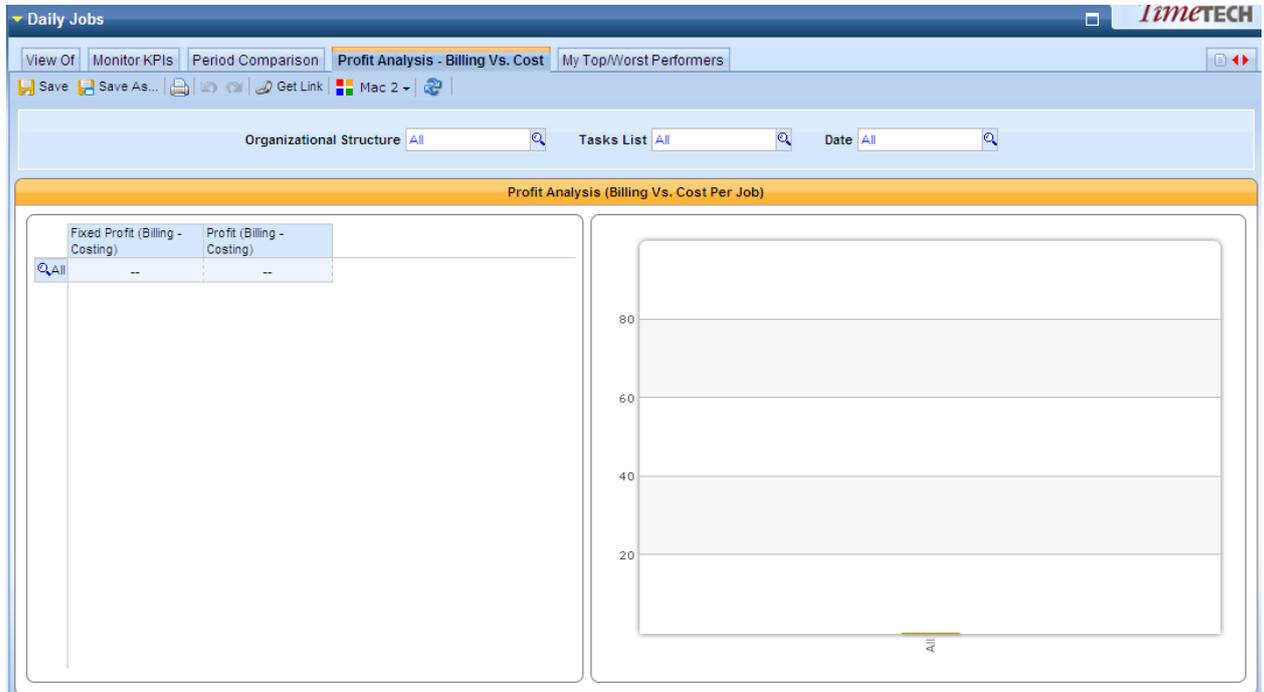
7. Click any of the other tabs in the **Time Costing** module to continue your analysis, if needed.

8. To return to the main screen, from the main toolbar, click **Home** .

### Profit Analysis – Billing vs. Cost

This screen enables you to view a comparison of daily intended resources per project vs. actual resources utilized.

TBD



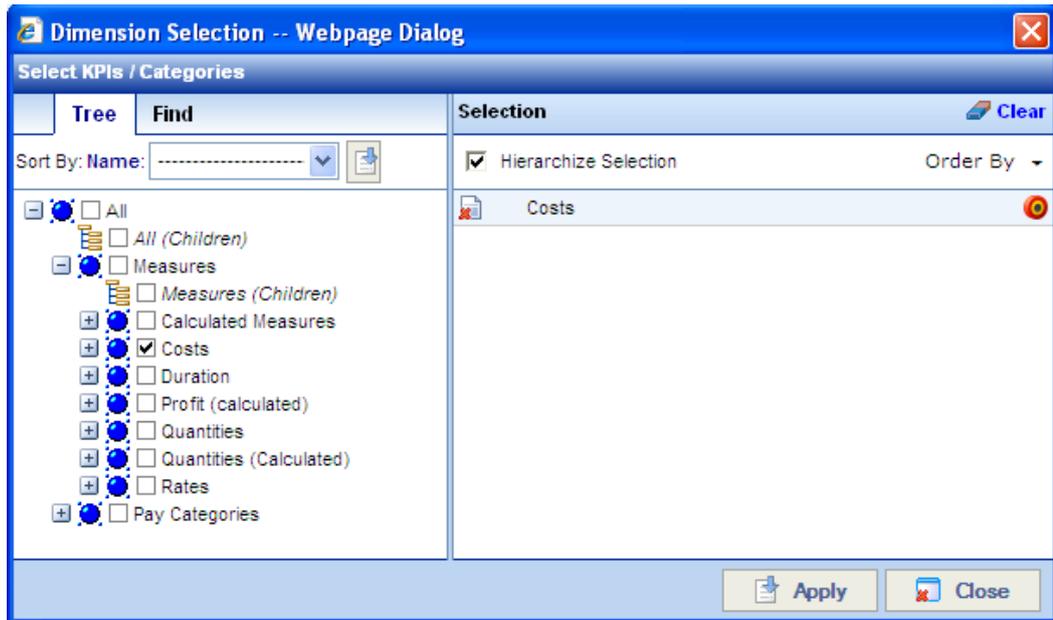
## My Top/Worst Performers

This screen enables you to display the highest or lowest placements of resource expenditures for active tasks. This can be percentile or actual numeric (ordered) placement per selected KPIs - **cost, duration, quantities, rates, and pay categories**. Additionally, as part of analyzing the active tasks, you can drill down from those active tasks to more specific units such as (in order) **work order, batch, part, process**.

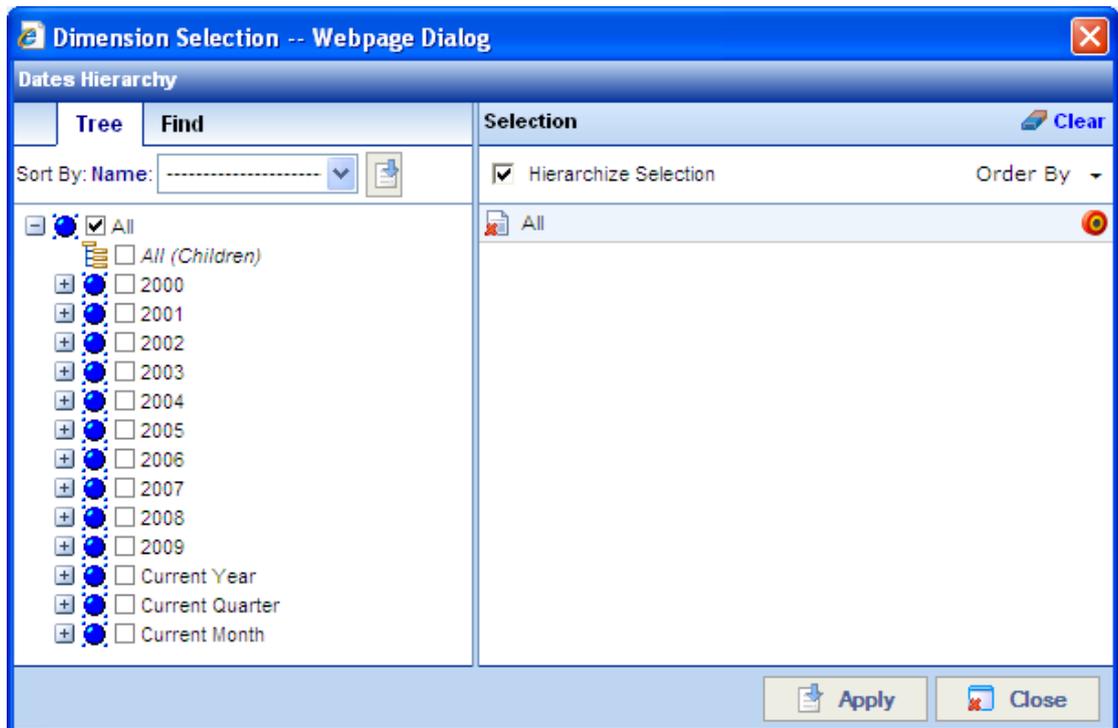
To use the **My Top/Worst Performers** screen, do as follows:

**NOTE:** The **Top/Worst Performers** screen is found only in the **Daily Jobs** module.

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 corporate hierarchies:
  - **Top Count** – displays the number of active tasks with the highest placement in a chosen criteria
  - **Bottom Count** – displays the number of active tasks with the lowest placement in a chosen criteria
  - **Top Percent** – displays the number of active tasks in the highest percentile in a chosen criteria
  - **Bottom Percent** - displays the number of active tasks in the lowest percentile in a chosen criteria
3. In the adjacent entry box, 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 per selected criteria.
4. In **Select KPIs/Categories**, click the  icon. The **Dimensions Selection** screen appears.
5. Select the criteria by which you want to analyze the active tasks. You can drill down further by expanding any of the options.



6. Click **Apply**.
7. In **Base Period**, click the **Find**  icon. The **Dimensions Selection** screen appears.
8. Select the period.

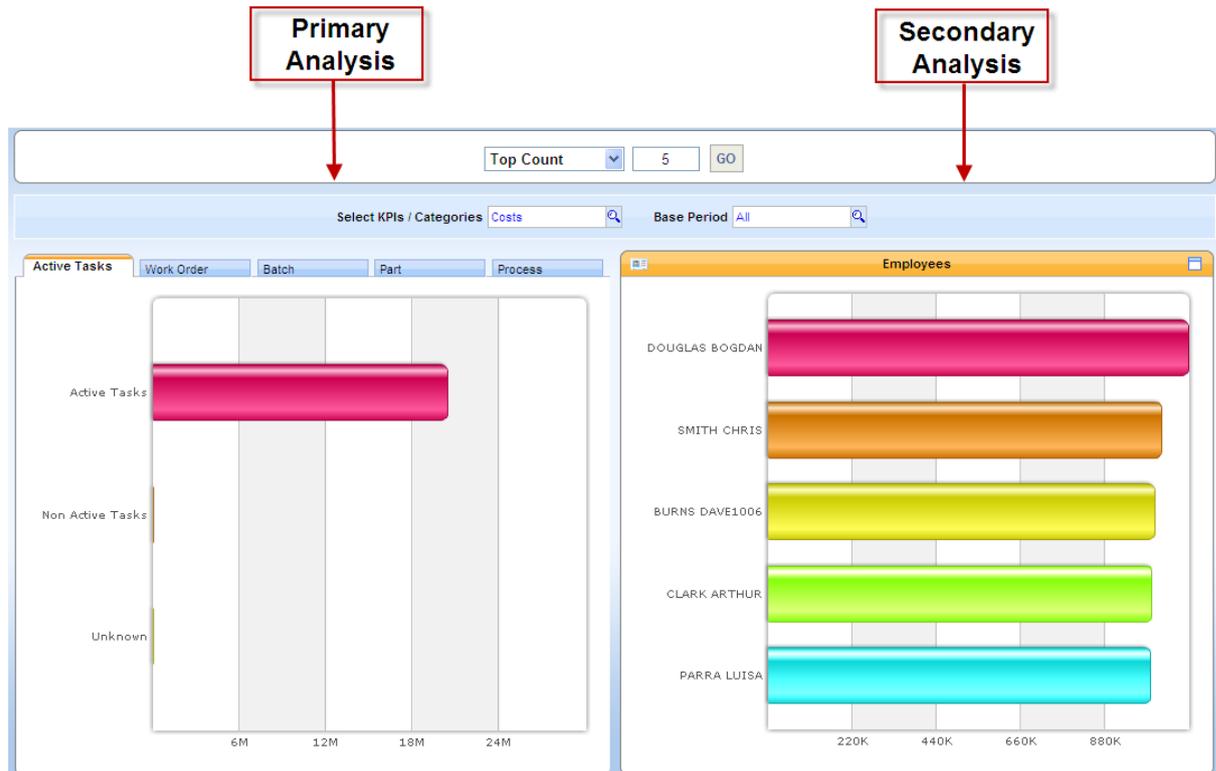


**NOTE:** The period selections in **Pay-Period Attendance** are *weekly, bi-weekly, monthly, and bi-monthly*.

9. Click **Apply** to generate the report. To change any values in the entry boxes, modify as needed, and click the **Go** button .

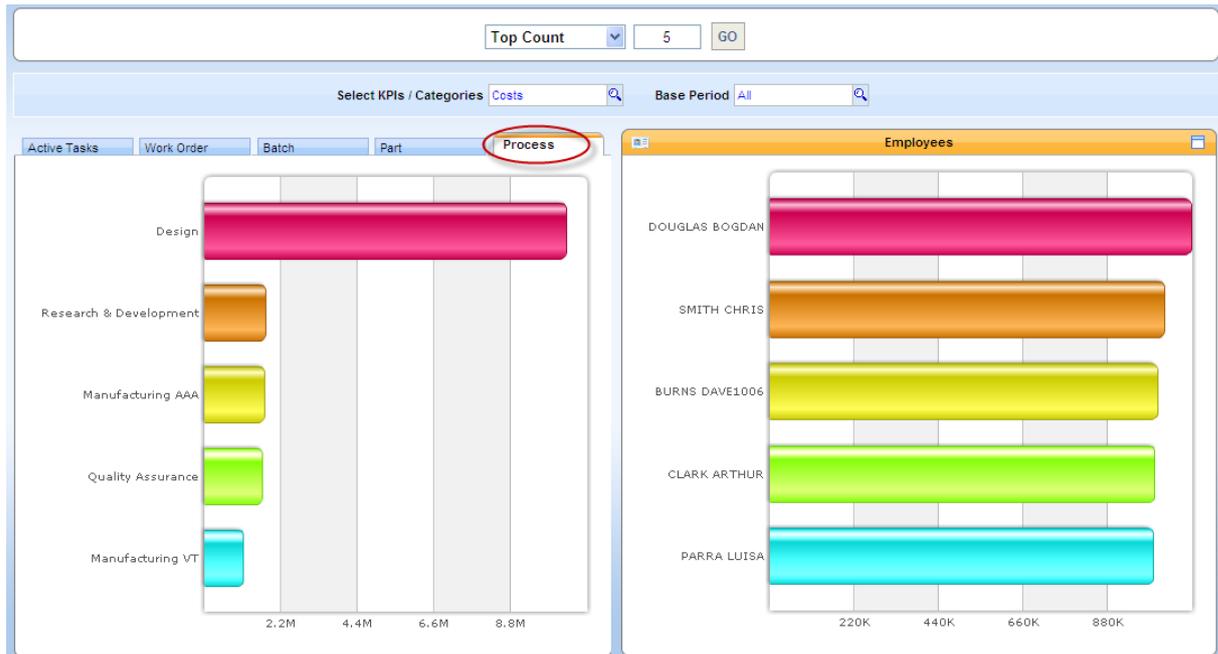
This example displays the top five active tasks with the highest costs. The generated report displays two analyses:

- The *primary* analysis, on the left, displays the top five active tasks with the highest cost
- The *secondary* analysis, on the right, relates to the single top analysis from the primary analysis display. It displays the top five employees with the most work hours in that task.



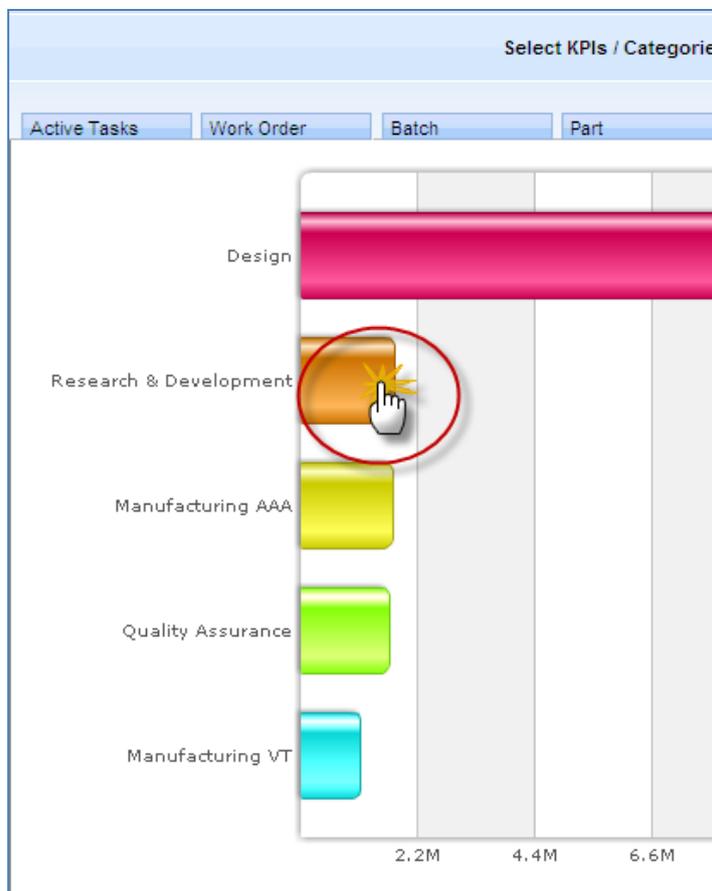
Optionally, do any of the following:

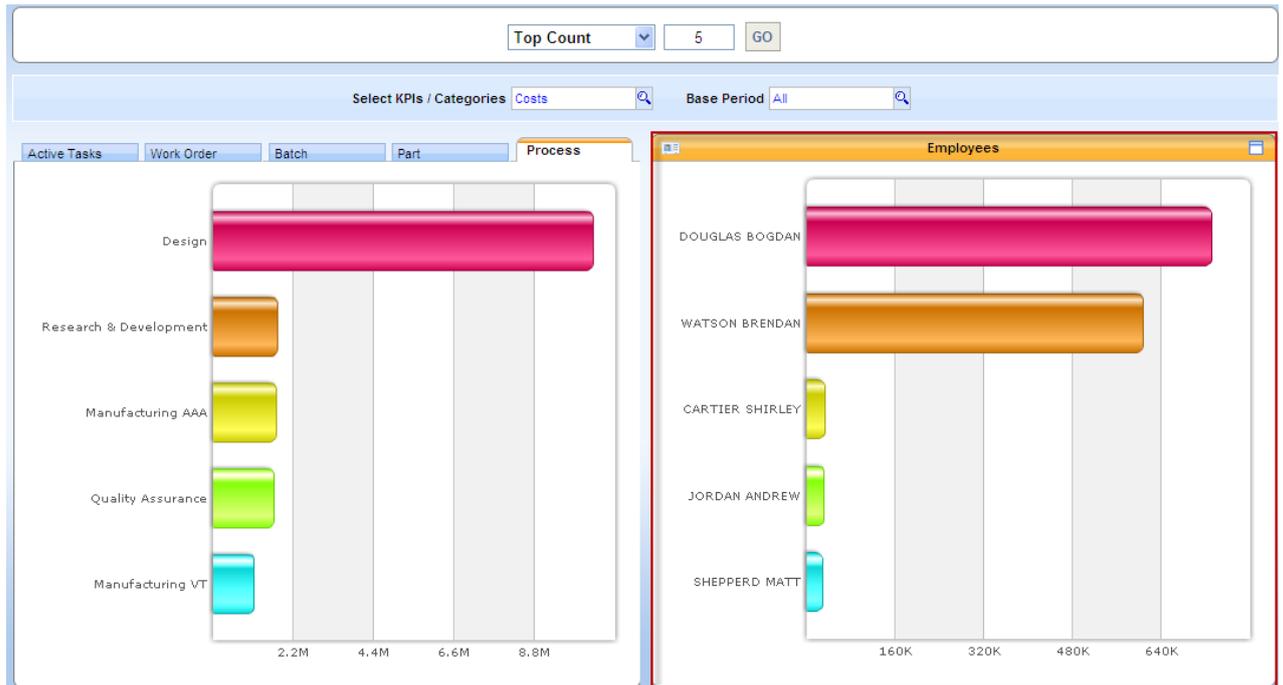
- Click the tabs in the primary analysis graph to view the results by **work order**, **batch**, **part**, and **process**.



**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 **Process** tab, to view a list of the top five employees with the most work hours in a certain process, click any of the processes (in this example, **Research & Development**). Note the update in the secondary analysis:





b. Continue any further analysis if needed.

- 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** .

## Creating User-Defined Analysis Screens

### Overview

The User-Defined Analysis screens enable you to create custom reports for either daily or pay period report types for the attendance level (as derived from the TimeKeeper module) and job allocation/labor distribution level (as derived from the TimeCosting module). 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.

Being able to pivot and aggregate data in so many combinations provides a clear and tremendous insight into your company; you can easily view totals across attendance, tasks, projects, etc. The results are custom reports displayed "on the fly." The entire procedure from concept to creation can take seconds. Each screen offers literally hundreds of possibilities. The functionality resembles that of MS Excel's pivot table. Additionally, the User-Defined Analysis screens add valuable functionality by enabling you to *shape* and *design* your screens the way you want; for example, you can switch the X and Y axes.

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
- Drill down for a more detailed picture, or conversely, drill up for the "big picture"

### Examples and Possibilities of the User-Defined Analysis Screens

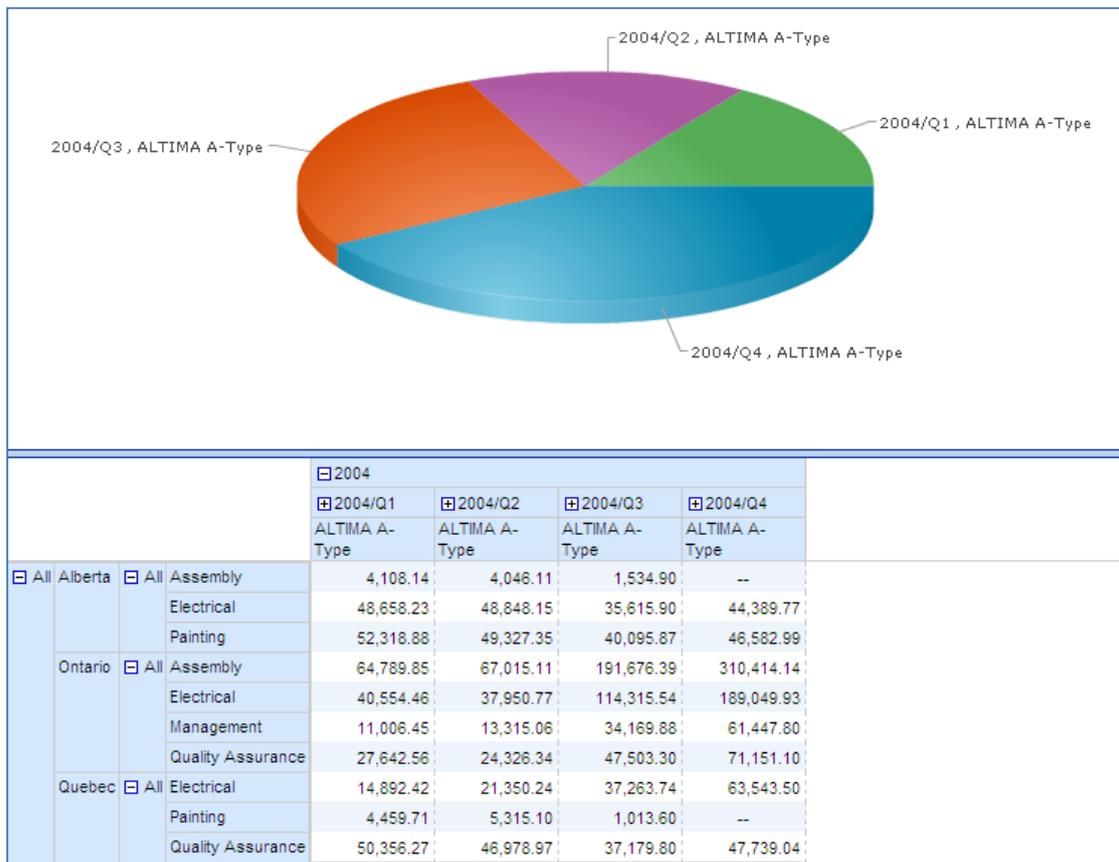
- Display overtime data for a specific year per weekday, department and even employee.

		2009							
		OverTime							
		All							
		Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	
<input checked="" type="checkbox"/>	Electrical	16.17	18.17	16.17	18.17	16.17	--	--	
<input checked="" type="checkbox"/>	Management	32.34	36.34	32.34	36.34	40.37	--	--	
<input checked="" type="checkbox"/>	Assembly	60.00	67.50	60.00	67.50	60.00	--	--	
<input checked="" type="checkbox"/>	Electrical	60.00	67.50	60.00	67.50	60.00	--	--	
<input checked="" type="checkbox"/>	Management	16.17	18.17	16.17	18.17	16.17	--	--	
<input checked="" type="checkbox"/>	Painting	CARTIER SHIRLEY	20.00	22.50	20.00	22.50	20.00	--	--
		CLARK ARTHUR	13.67	18.00	13.67	26.67	13.67	--	111.29
		SEINFELD TED	32.50	40.00	32.50	40.00	32.50	--	--
		WATSON BRENDAN	16.17	18.17	16.17	18.17	16.17	--	--
<input checked="" type="checkbox"/>	Quality Assurance	53.67	63.00	53.67	71.67	53.67	--	--	
<input checked="" type="checkbox"/>	Assembly	33.50	43.00	32.50	40.00	32.50	41.00	110.00	
<input checked="" type="checkbox"/>	Customer Service	17.67	22.00	17.67	39.67	14.67	--	111.29	

- Display project hours for a specific year, divided by quarters, per province/department.

				2004			
				2004/Q1	2004/Q2	2004/Q3	2004/Q4
				ALTIMA A-Type	ALTIMA A-Type	ALTIMA A-Type	ALTIMA A-Type
All	Alberta	All	Assembly	4,108.14	4,046.11	1,534.90	--
			Electrical	48,658.23	48,848.15	35,615.90	44,389.77
			Painting	52,318.88	49,327.35	40,095.87	46,582.99
	Ontario	All	Assembly	64,789.85	67,015.11	191,676.39	310,414.14
			Electrical	40,554.46	37,950.77	114,315.54	189,049.93
			Management	11,006.45	13,315.06	34,169.88	61,447.80
			Quality Assurance	27,642.56	24,326.34	47,503.30	71,151.10
	Quebec	All	Electrical	14,892.42	21,350.24	37,263.74	63,543.50
			Painting	4,459.71	5,315.10	1,013.60	--
			Quality Assurance	50,356.27	46,978.97	37,179.80	47,739.04

- Display the *same* data, but add a colorful pie chart for an additional representation.



- Add a column displaying column total, and highlight the column name in the color/font of your choice.

				2004				Total
				2004/Q1	2004/Q2	2004/Q3	2004/Q4	
				ALTIMA A-Type	ALTIMA A-Type	ALTIMA A-Type	ALTIMA A-Type	
All	Alberta	All	Assembly	4,108.14	4,046.11	1,534.90	--	9,689.16
			Electrical	48,658.23	48,848.15	35,615.90	44,389.77	177,512.04
			Painting	52,318.88	49,327.35	40,095.87	46,582.99	188,325.09
	Ontario	All	Assembly	64,789.85	67,015.11	191,676.39	310,414.14	633,895.49
			Electrical	40,554.46	37,950.77	114,315.54	189,049.93	381,870.70
			Management	11,006.45	13,315.06	34,169.88	61,447.80	119,939.19
			Quality Assurance	27,642.56	24,326.34	47,503.30	71,151.10	170,623.31
	Quebec	All	Electrical	14,892.42	21,350.24	37,263.74	63,543.50	137,049.90
			Painting	4,459.71	5,315.10	1,013.60	--	10,788.41
			Quality Assurance	50,356.27	46,978.97	37,179.80	47,739.04	182,254.08

- Display the same data with different dimensions. The following displays project hours for a specific year, divided by quarters, per province/department.

			2004			
			2004/Q1	2004/Q2	2004/Q3	2004/Q4
			ALTIMA A-Type	ALTIMA A-Type	ALTIMA A-Type	ALTIMA A-Type
All	Alberta	Assembly	4,108.14	4,046.11	1,534.90	--
		Electrical	48,658.23	48,848.15	35,615.90	44,389.77
		Painting	52,318.88	49,327.35	40,095.87	46,582.99
	Ontario	Assembly	64,789.85	67,015.11	191,676.39	310,414.14
		Electrical	40,554.46	37,950.77	114,315.54	189,049.93
		Management	11,006.45	13,315.06	34,169.88	61,447.80
		Quality Assurance	27,642.56	24,326.34	47,503.30	71,151.10
	Quebec	Electrical	14,892.42	21,350.24	37,263.74	63,543.50
		Painting	4,459.71	5,315.10	1,013.60	--
		Quality Assurance	50,356.27	46,978.97	37,179.80	47,739.04

- The following displays the same, but without any indication of province.

		2004					
		2004/Q1			2004/Q2	2004/Q3	2004/Q4
		01/2004	02/2004	03/2004	ALTIMA A-Type	ALTIMA A-Type	ALTIMA A-Type
		ALTIMA A-Type					
All	Assembly	26,203.91	19,491.08	23,203.00	71,061.22	193,211.29	310,414.14
	Electrical	36,236.17	32,432.59	35,436.35	108,149.16	187,195.18	296,983.20
	Management	4,745.10	2,957.74	3,303.61	13,315.06	34,169.88	61,447.80
	Painting	38,748.22	35,303.76	39,915.58	95,271.49	87,398.42	109,001.85
	Quality Assurance	25,625.21	27,606.76	24,766.86	71,305.31	84,683.10	118,890.14

## Drilldown Functionality

The user-defined analysis screens enable you to turn any chart into a major source of knowledge and information. You can widen your view of any chart by drilling down for a more detailed picture, or conversely, by drilling up for the "big picture". Consider the following examples, displaying project hours per pay period:

	+ Bi-Weekly	+ Monthly	+ Semi-Montly	+ Weekly
+ Amano	101,015.33	--	--	--
+ LTT	557,342.51	-15,259.70	2,737.17	--

Note what happens when drilling down per pay period (bi-weekly) – you receive a yearly breakdown:

	+ Bi-Weekly										+ Monthly	+ Semi-Montly	+ Weekly
	+ 2000	+ 2001	+ 2002	+ 2003	+ 2004	+ 2005	+ 2006	+ 2007	+ 2008	+ 2009			
+ Amano	17,569.34	20,372.67	9,579.98	18,400.55	13,986.14	12,496.25	6,796.32	1,405.33	-751.00	1,159.73	--	--	--
+ LTT	49,083.62	29,914.13	36,009.66	44,393.15	250,713.86	51,403.12	116,242.84	26,917.09	-43,822.75	-3,512.23	-15,259.70	2,737.17	--

Then, if you drill-down per year, you receive a monthly breakdown:

	+ Bi-Weekly											
	+ 2000											
	01/2000 (27/12/1999 - 09/01/2000)	02/2000 (10/01/2000 - 23/01/2000)	03/2000 (24/01/2000 - 06/02/2000)	04/2000 (07/02/2000 - 20/02/2000)	05/2000 (21/02/2000 - 05/03/2000)	06/2000 (06/03/2000 - 19/03/2000)	07/2000 (20/03/2000 - 02/04/2000)	08/2000 (03/04/2000 - 16/04/2000)	09/2000 (17/04/2000 - 30/04/2000)	10/2000 (01/05/2000 - 14/05/2000)	11/2000 (15/05/2000 - 28/05/2000)	12/2000 (29/05/2000 - 11/06/2000)
+ Amano	393.59	772.25	456.15	795.67	788.52	781.19	-348.88	-24.00	808.48			
+ LTT	-1,283.35	2,876.49	1,393.26	3,766.74	2,276.18	-309.81	2,357.23	3,344.60	2,914.54			

Drill-down per plant for a breakdown per site:

	+ Bi-Weekly											
	+ 2000											
	01/2000 (27/12/1999 - 09/01/2000)	02/2000 (10/01/2000 - 23/01/2000)	03/2000 (24/01/2000 - 06/02/2000)	04/2000 (07/02/2000 - 20/02/2000)	05/2000 (21/02/2000 - 05/03/2000)	06/2000 (06/03/2000 - 19/03/2000)	07/2000 (20/03/2000 - 02/04/2000)	08/2000 (03/04/2000 - 16/04/2000)	09/2000 (17/04/2000 - 30/04/2000)	10/2000 (01/05/2000 - 14/05/2000)	11/2000 (15/05/2000 - 28/05/2000)	12/2000 (29/05/2000 - 11/06/2000)
+ Amano	393.59	772.25	456.15	795.67	788.52	781.19	-348.88	-24.00	808.48			
+ LTT												
+ CAPE TOWN	112.00	-255.83	193.83	486.00	283.39	193.50	481.37	148.86				
+ HQ	-1,290.35	1,488.30	-22.12	1,639.19	350.71	-2,147.33	233.78	1,551.72				
+ New York	-314.50	420.33	210.33	420.33	420.33	420.33	420.33	420.33				
+ Toronto	209.50	1,223.68	1,011.21	1,221.21	1,221.74	1,223.68	1,221.74	1,223.68				

Drill-down per site for a breakdown per department:

	+ Bi-Weekly											
	+ 2000											
	01/2000 (27/12/1999 - 09/01/2000)	02/2000 (10/01/2000 - 23/01/2000)	03/2000 (24/01/2000 - 06/02/2000)	04/2000 (07/02/2000 - 20/02/2000)	05/2000 (21/02/2000 - 05/03/2000)	06/2000 (06/03/2000 - 19/03/2000)	07/2000 (20/03/2000 - 02/04/2000)	08/2000 (03/04/2000 - 16/04/2000)	09/2000 (17/04/2000 - 30/04/2000)	10/2000 (01/05/2000 - 14/05/2000)	11/2000 (15/05/2000 - 28/05/2000)	12/2000 (29/05/2000 - 11/06/2000)
+ Amano	393.59	772.25	456.15	795.67	788.52	781.19	-348.88	-24.00	808.48			
+ LTT												
+ CAPE TOWN												
+ Electrical	--	--	--	--	--	--	--	--	--			
+ Management	112.00	-255.83	193.83	486.00	283.39	193.50	481.37	148.86				
+ HQ	-1,290.35	1,488.30	-22.12	1,639.19	350.71	-2,147.33	233.78	1,551.72				
+ New York	-314.50	420.33	210.33	420.33	420.33	420.33	420.33	420.33				
+ Toronto	209.50	1,223.68	1,011.21	1,221.21	1,221.74	1,223.68	1,221.74	1,223.68				

And finally, per employee:

		Bi-Weekly							
		2000							
		01/2000 (27/12/1999 - 09/01/2000)	02/2000 (10/01/2000 - 23/01/2000)	03/2000 (24/01/2000 - 06/02/2000)	04/2000 (07/02/2000 - 20/02/2000)	05/2000 (21/02/2000 - 05/03/2000)	06/2000 (06/03/2000 - 19/03/2000)	07/2000 (20/03/2000 - 02/04/2000)	
<input checked="" type="checkbox"/> Amano		393.59	772.25	456.15	795.67	788.52	781.19		-348.88
<input checked="" type="checkbox"/> LTT	<input checked="" type="checkbox"/> CAPE								
	<input checked="" type="checkbox"/> TOWN								
	<input checked="" type="checkbox"/> Electrical								
	<input checked="" type="checkbox"/> Management								
	SMITH JOHN	--	--	--	--	--	--	--	--
	BURNS DAVE1006	112.00	-255.83	193.83	486.00	283.39	193.50		481.37
	JONES RICK 7777	--	--	--	--	--	--		--
<input checked="" type="checkbox"/> HQ		-1,290.35	1,488.30	-22.12	1,639.19	350.71	-2,147.33		233.78
<input checked="" type="checkbox"/> New York		-314.50	420.33	210.33	420.33	420.33	420.33		420.33
<input checked="" type="checkbox"/> Toronto		209.50	1,223.68	1,011.21	1,221.21	1,221.74	1,223.68		1,221.74

## User-Defined Screens 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 corporate hierarchies.

## Daily Data Analysis Screen

The screenshot shows the 'Daily Data Analysis' window. The 'Designer' panel on the left includes sections for:

- On Columns:** Dates Hierarchy
- On Rows:** Corporate Hierarchy
- Slicers:** (empty)
- Measures:** Pay Categories Groups
- Dimensions:** absence Groups, CONTRACT (Attn. & Absence Rule), Day Types, Entry, Exit, PROFS (Profession Codes/Share), Week Day, Weeks
- Sorts:** First Sort, Service Eligibility, FIFO, Gil, Sort Code #5
- Organization Structure (highlighted):** SITES (Site Codes/Shared), PLANTS (Plant Codes/Shared), DPARTMNT (Dept. Definitions/Sha)

The main data grid shows columns for years 2000-2009 and rows for 'Amano', 'LTT', and 'NA --1'.

**Organization Structure**

- SITES (Site Codes/Shared)
- PLANTS (Plant Codes/Shared)
- DPARTMNT (Dept. Definitions/Shared)
- Corporate Hierarchy (History)
- EMPLOYEE (Employee Details/Shared)
- EMPLOYEE (Employee Details/Shared)

## Pay Period Data Analysis Screen

Pay-Period Data Analysis

TimeKeeper Module | TimeCosting Module | Shifts Data Analysis | Organization Structure (Detailed)

Save | Save As... | Designer | Options | Highlights

**Designer**

Criteria Editor

On Columns

Periods

On Rows

Corporate Hierarchy

Slicers

**Measures**

Pay Categories Groups

**Dimensions**

absence Groups

CONTRACT (Attn. & Absen)

PROFS (Profession Codes)

**Sorts**

First Sort

Service Eligibility

FIFO

Gil

Sort Code #5

**Organizational Structure**

PLANTS (Plant Codes/Shar)

SITES (Site Codes/Shared)

DPARTMNT (Dept. Definitio)

Corporate Hierarchy (Hisc)

EMPLOYEE (Employee Deta)

EMPLOYEE (Employee Deta)

	Bi-Weekly	Monthly	Semi-Montly	Weekly
Amano	--	--	--	--
LTT	--	--	--	--
NA --1	--	--	--	--

## Toolbar

Button	Name	Description
	<b>Save</b>	If screen/settings have already been saved as a report, this saves any additional changes.
	<b>Save As</b>	Enables you to save the current report and access it at a later time via a shortcut
	<b>Export</b>	Exports the current screen data to an .HTML file or an Excel spreadsheet.
	<b>Criteria Selection</b>	Opens another (movable) instance of the <b>Designer</b> pane
	<b>Undo</b>	Erases the last change done to the screen , thus reverting it to an older state
	<b>Redo</b>	Reverses the undo or advances the buffer to a more current state
	<b>Designer</b>	Opens and closes the <b>Designer</b> pane. Alternatively, to close the <b>Designer</b> pane, click  at the top right.
	<b>Options</b>	Enables you to re-arrange the axes of the current settings
	<b>Highlights</b>	Enables you to highlight any exceptional values via selected colors
	<b>Clear Highlights</b>	Removes any highlights you have defined
	<b>Find</b>	Enables you quickly to find a word or number in the grid

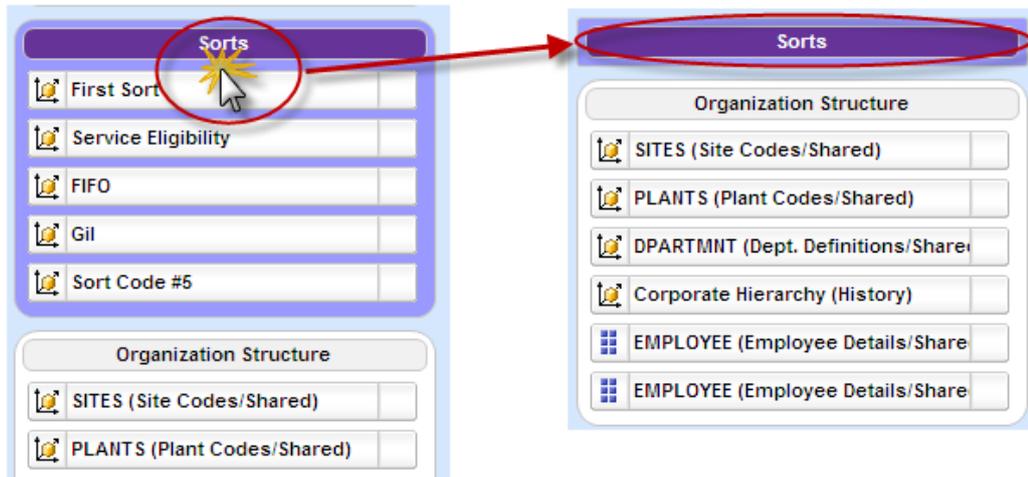
## Designer Pane

**NOTE:** The **Pay Period Data Analysis** screen contains fewer selections in the **Dimensions** area.

The Designer pane is a vertical sidebar with a close button (X) at the top right. It contains several sections for configuring a report:

- Criteria Editor:** A dropdown menu at the top.
- On Columns:** A button with a grid icon and a dropdown arrow.
- On Rows:** A button with a grid icon and a dropdown arrow.
- Slicers:** A button with a slicer icon.
- Measures:** A dark blue header section containing a button for "Pay Categories Grou".
- Dimensions:** A green header section containing a list of dimension buttons: "absence Groups", "CONTRACT (Attn. & A", "Day Types", "Entry", "Exit", "PROFS (Profession C", "Week Day", and "Weeks".
- Sorts:** A purple header section containing a list of sort buttons: "First Sort", "Service Eligibility", "FIFO", "Gil", and "Sort Code #5".
- Organization Structure:** A light blue header section containing a list of organization structure buttons: "SITES (Site Codes/Sh", "PLANTS (Plant Codes", and "DPARTMNT (Dept. De".

**TIP:** To collapse any section of the **Designer** pane, click that section's heading once (to revert to expanded form, simply click the heading again).



You can click the **Shortcut**  button on the top toolbar to close the **Shortcut** pane. This provides you with more space to comfortably view and work with custom reports.

Name	Description	
<b>Criteria Editor</b>		Enables you to view which filtering criteria from the <b>Designer</b> pane are currently used on the columns and rows in the grid
	<b>On Columns</b>	Enables you to view which filtering criteria from the <b>Designer</b> pane are currently used on the columns in the grid
	<b>On Rows</b>	Enables you to view which filtering criteria from the <b>Designer</b> pane are currently used on rows in the grid
<b>Dates Hierarchy</b>		Enables period selection for filtering purposes
<b>Slicers</b>		Displays all dimensions selected for the current report
<b>Measures</b>	<b>Select KPIs/Pay Categories</b>	The categories available for your analysis, such as overtime and attendance
<b>Dimensions</b>		Criteria used for filtering purposes
	<b>Absence Groups</b>	All the absence codes defined in your system, arranged by groups- sickness, reserve duty, vacation, etc.
	<b>Contracts</b>	All the agreements defined in the system
	<b>Day Types</b>	All defined days in the company's year – holidays, weekends,

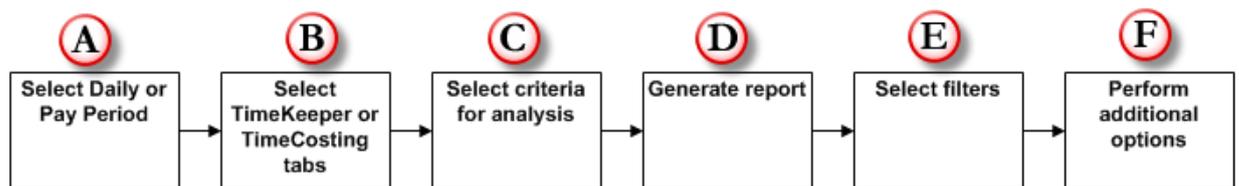
		work days, etc.
	<b>Entry</b>	Entry times according to defined shifts
	<b>Exit</b>	Exit times according to defined shifts
	<b>Profs</b>	All defined professions in the system, according to tenure
	<b>Week Day</b>	All days of the week
	<b>Weeks</b>	All weeks of the year
<b>Organizational Structure</b>		How your corporate hierarchy is structured according to its levels
	<b>Corporate Hierarchy</b>	All currently active corporate hierarchies
	<b>Corporate Hierarchy (History)</b>	All past (and non-active) corporate hierarchies
	<b>Sites</b>	All the sites defined in your system
	<b>Plants</b>	All the plants defined in your system
	<b>Department</b>	All the departments defined in your system
	<b>Employees</b>	All employees currently active in your system
	<b>Employee History</b>	All past (and non-active) employees
<b>Sorts</b>		<b>Sorts</b> is an extension to the Organizational Structure (see above). <b>Sorts</b> are customer defined and differ per company; these are additional fields that enable categorizing employees. Common sorts are <i>team</i> , <i>province</i> , <i>area</i> 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 can be summed up as follows (note that this chart is only a summary and the following numbered procedure provides a detailed expansion):

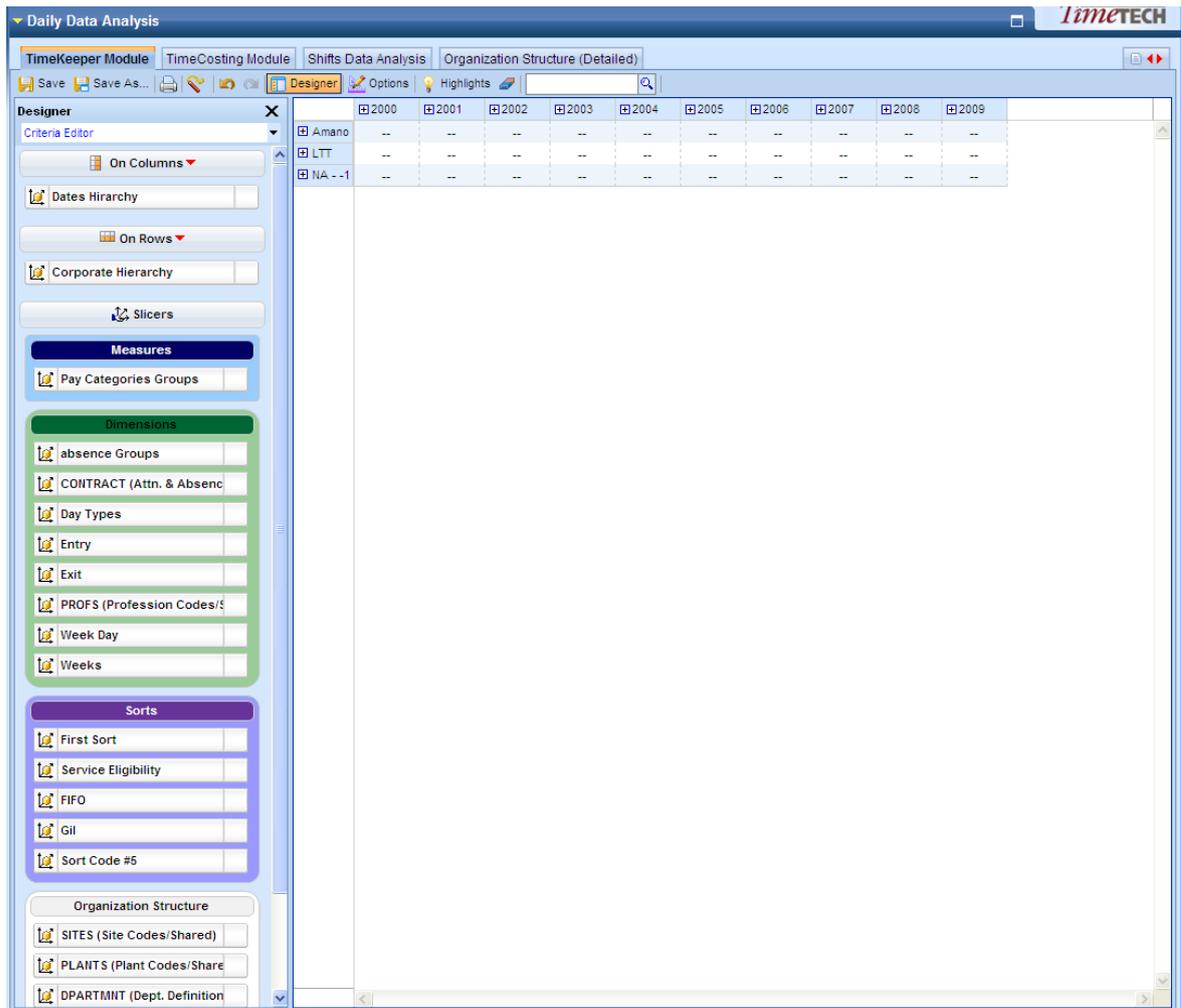


To work with the **Daily Data Analysis** screen do as follows:

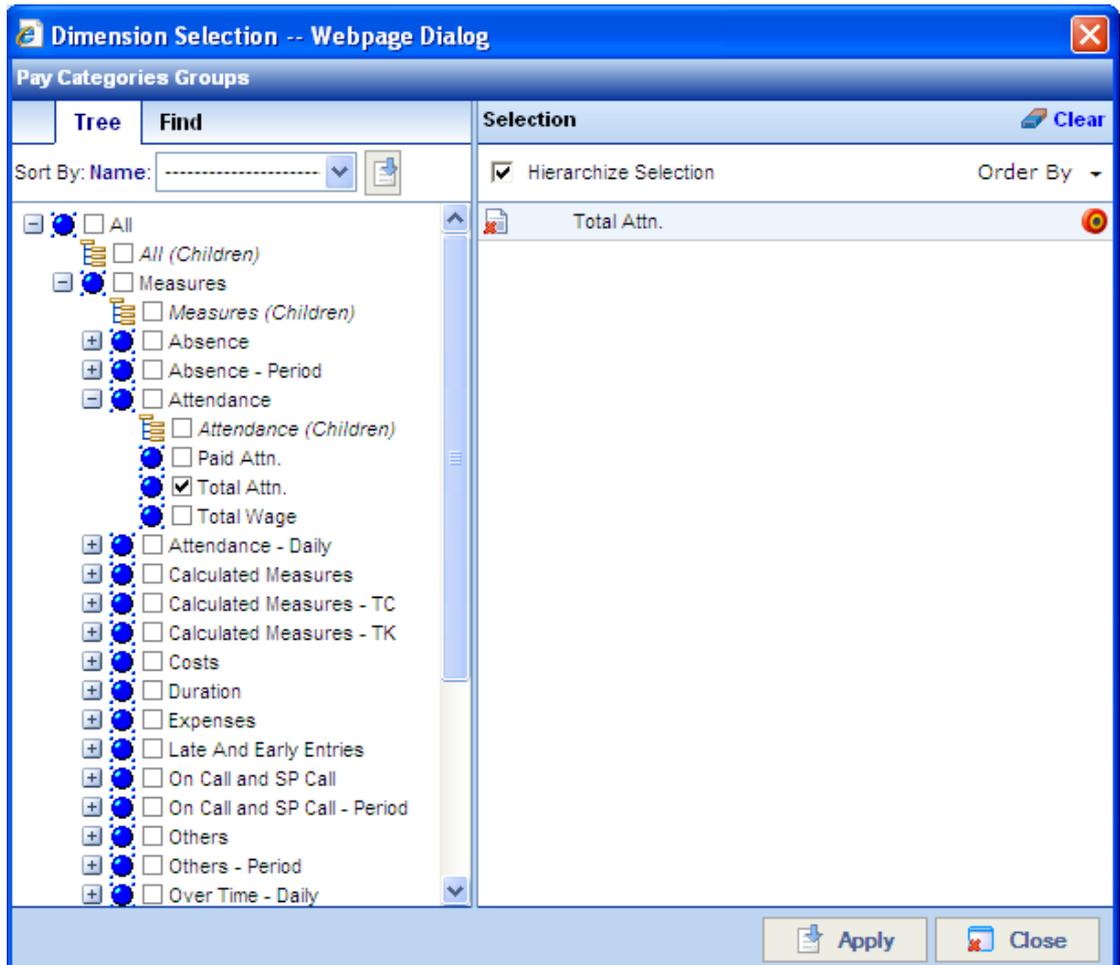
1. From the **Home** pane, from the **User-Defined Analysis** area, click **Daily Data Analysis**. The **Daily Data Analysis** screen appears, set by default to the **TimeKeeper Module**. The **TimeKeeper Module** screen in **Daily Data Analysis** enables you to create custom reports for daily periods for the attendance level.

The main grid displays years (columns) and the corporate hierarchies (rows). Note that the corporate hierarchy appears as rows and the dates appear as columns.

**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 in this application per for every corporate hierarchy, and are not customer-specific
  - *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

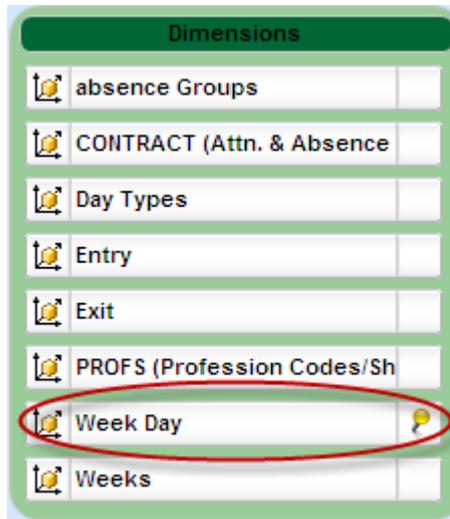
This example filters the previous example - total attendance per year – by showing attendance on Thursdays only.

The screenshot shows the 'Designer' application interface. A 'Dimension Selection -- Webpage Dialog' is open, showing a tree view of dimensions. The 'Week Day' dimension is selected and highlighted with a red oval. In the 'Selection' pane, 'Thursday' is selected. The background shows a grid with columns for years from 2000 to 2007 and a row for 'All' with values: 34,568.23, 47,588.19, 44,338.64, 45,577.97, 47,746.72, 41,268.04, 42,407.50, 3,373.75.

Note the change in the grid:

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
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	--	--	--	--	--	--	--	--	--	--

**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 corporate hierarchies, or the dates.

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
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	
LTT 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	
LTT HQ 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	
LTT HQ Management	412.50	405.58	392.00	395.08	491.25	366.00	389.50	26.25	0.00	
LTT HQ 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	
LTT HQ 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	
LTT New York	462.75	387.91	407.50	479.75	498.83	393.98	385.50	26.25	48.00	
LTT 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. At this point, there are two approaches to displaying and working with the data in the grid.
  - You can continue with the basic functionality by displaying a single **X** dimension opposite a single **Y** dimension in the grid, while using one filter as a main criteria.

or

  - You can use sub-dimensions by remaining with a single **Y** dimension, and adding multiple **X** dimensions. For example of this, you can display attendance per individual employee. Drag **Employee** from the bottom of the **Designer** pane to the desired location in the grid.

▼ Daily Data Analysis

TimeKeeper Module | TimeCosting Module | Shifts Data Analysis | Organization Structure (Detailed)

Save | Save As... | Designer | Options | Highlights

**Designer**

Criteria Editor

Corporate Hierarchy

Slicers

**Measures**

Pay Categories Groups

**Dimensions**

absence Groups

CONTRACT (Attn. & Absence Rules/7

Day Types

Entry

Exit

PROFS (Profession Codes/Shared)

Week Day

Weeks

**Sorts**

First Sort

Service Eligibility

FIFO

Gil

Sort Code #5

**Organization Structure**

SITES (Site Codes/Shared)

PLANTS (Plant Codes/Shared)

DPARTMNT (Dept. Definitions/Shared

Corporate Hierarchy (History)

**EMPLOYEE (Employee Details/Shared)**

EMPLOYEE (Employee Details/Shared

	2000	2001	2002	2003	2004	2005
Amano	442.34	432.00	416.00	433.71	453.95	369.64
LTT					10,429.59	8,446.55
NA --						

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

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
Amano	442.34	432.00	416.00	433.71	453.95	369.64	389.50	26.25	0.00	103.10
LTT				2.53	10,429.59	8,446.55	8,263.00	577.50	232.50	2,093.40
NA --										

Add Dimension Before  
 Add Dimension After  
 Replace Dimension  
 Replace and move Amano to Slicers

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

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	--	
	ROCCA LUISA ⊕ LTT	314.50	403.50	408.00	404.00	479.00	415.00	389.50	26.25	0	
	SAMPAT ORLANDO ⊕ LTT	88.00	403.50	400.00	413.00	461.00	376.00	389.50	26.25	0	
	SEINFELD TED ⊕ LTT	431.75	345.00	433.50	380.00	488.83	360.00	236.50	26.25	0	
SHEPPERD MATT ⊕ LTT	412.50	405.58	392.00	395.08	491.25	366.00	389.50	26.25	0		
SMITH CHRIS ⊕ LTT	439.14	422.08	400.00	434.44	454.92	402.56	389.50	26.25	0		
SMITH JOHN ⊕ LTT	210.50	405.58	408.00	401.00	481.20	382.00	389.50	26.25	0		
SMITH JOSEPH ⊕ LTT	296.50	403.50	400.00	405.00	480.00	372.00	389.50	26.25	0		
WATSON BRENDAN ⊕ LTT	444.75	432.35	417.00	393.50	476.24	461.74	389.50	26.25	54		

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

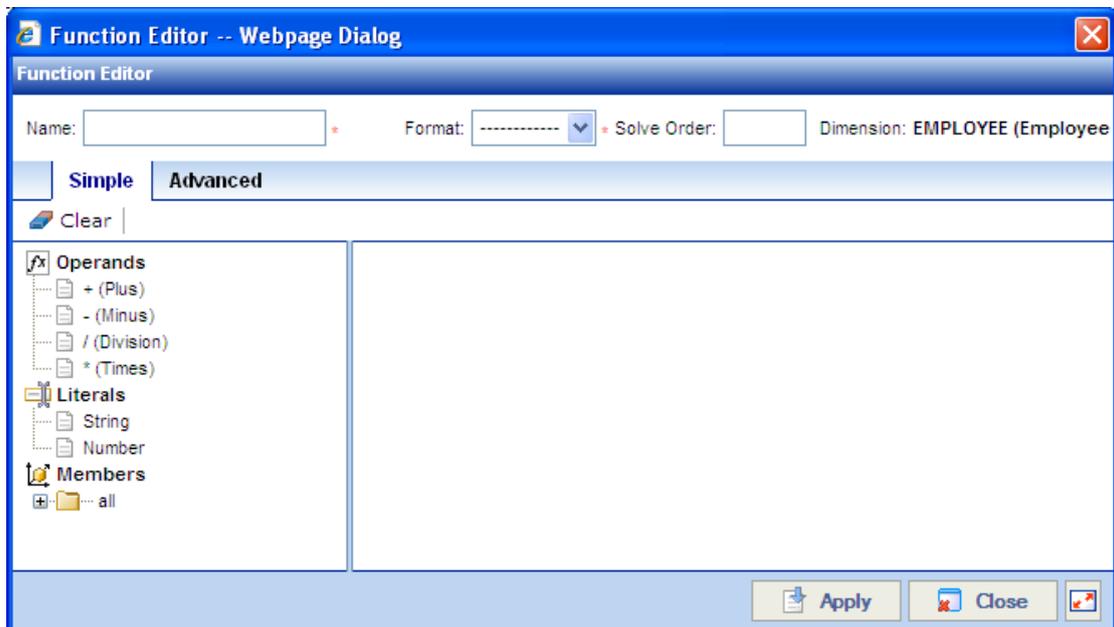
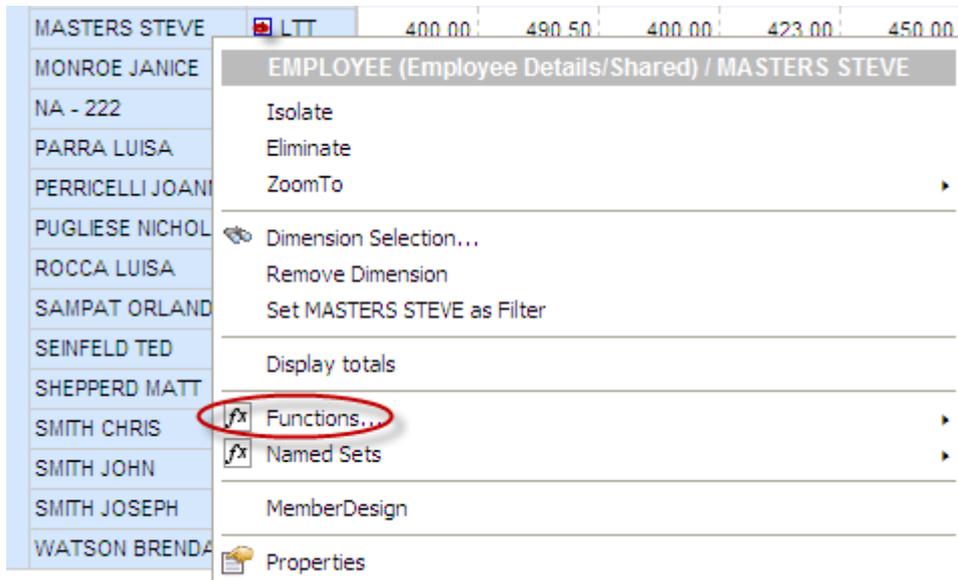
			2000	2001	2002	2003	2004	2005
all	BAIG SAIRA	LTT	170				104.00	489.00
	BURNS DAVE1006	LTT	422				42.92	469.37
	BURNS DAVE7777	LTT	--				--	--
	CARTIER SHIRLEY	LTT	316				15.25	499.00
	CLARK ARTHUR	LTT	457				49.22	444.67
	CURRAN NANCY	LTT	129				12.00	490.00
	DOUGLAS BOGDAN	LTT	462				79.75	498.83
	FAZIO MERCEDES	LTT	258				14.00	479.00
	HILLMAN JAKE	LTT	129				12.00	490.00
	HUSTON GRACE	LTT	74				104.25	461.75
	JORDAN ANDREW	LTT	432				88.00	455.61
	MASTERS STEVE	LTT	400				23.00	450.00
	MONROE JANICE	LTT	468				57.12	448.17
	NA - 222	NA - -1	--				--	--

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

## Additional Options

### Adding a Function to an Analysis

1. From the grid, right-click any dimension, and select **Functions > New** from the drop-down menu. The **Functions Editor** screen appears.



- In **Name**, enter a name for this function.
- In **Format**, select **#,#**.
- In **Members**, expand the hierarchy to select the values or objects.
- In **Operands**, select the mathematical operand involved.

To display a column combining the totals for **2004** and **2005**, the **Function Editor** and its output would look like this:

**Function Editor -- Webpage Dialog**

Function Editor

Name:  \*    Format:  \*    Solve Order:     Dimension: Dates Hierarchy

**Simple**    **Advanced**

Clear

**Operands**

- + (Plus)
- (Minus)
- / (Division)
- \* (Times)

**Literals**

- String
- Number

**Members**

- All
- 2000
- 2001
- 2002
- 2003
- 2004
- 2005
- 2006
- 2007
- 2008
- 2009
- 08+09
- Average per Year

2004 + 2005

			2003	2004	2005	2006	2007	2008	2009	04+05	Total	
all	BAIG SAIRA	LTT	0	404.00	489.00	380.00	389.50	26.25	0.00	102.50	869	3,919.85
	BURNS DAVE1006	LTT	5	442.92	469.37	393.24	393.50	26.25	89.50	107.10	863	4,331.15
	BURNS DAVE7777	LTT		--	--	--	--	--		103.10	--	113.41
	CARTIER SHIRLEY	LTT	5	415.25	499.00	364.00	389.50	26.25	0.00	102.50	863	4,082.98
	CLARK ARTHUR	LTT	0	449.22	444.67	391.80	389.50	26.25	0.00	103.10	836	4,209.30
	CURRAN NANCY	LTT	0	412.00	490.00	372.00	389.50	26.25	0.00	102.50	862	3,850.98
	DOUGLAS BOGDAN	LTT	0	479.75	498.83	393.98	385.50	26.25	48.00	109.50	893	4,412.78
	FAZIO MERCEDES	LTT	0	414.00	479.00	364.00	389.50	26.25	0.00	102.50	843	3,963.98
	HILLMAN JAKE	LTT	0	412.00	490.00	372.00	389.50	26.25	0.00	102.50	862	3,866.93
	HUSTON GRACE	LTT	0	404.25	461.75	380.00	389.50	26.25	0.00	--	842	3,629.43
	JORDAN ANDREW	LTT	6	388.00	455.61	395.44	389.50	26.25	11.00	103.10	851	4,125.37
	MASTERS STEVE	LTT	0	423.00	450.00	374.00	389.50	26.25	--	--	824	4,072.58
	MONROE JANICE	LTT	0	457.12	448.17	386.79	236.50	26.25	30.00	126.10	835	4,171.18
	NA - 222	NIA --1		--	--	--	--	--		--	--	--
	PARRA LUISA	Amano	0	433.71	453.95	369.64	389.50	26.25	0.00	103.10	824	4,196.73
	PERRICELLI JOANNE	LTT	0	403.00	480.75	372.00	389.50	26.25	0.00	102.50	853	4,106.83
	PUGLIESE NICHOLAS	LTT	0	412.00	461.00	372.00	389.50	26.25	--	--	833	3,703.73
	ROCCA LUISA	LTT	0	404.00	479.00	415.00	389.50	26.25	0.00	102.50	894	4,130.48
	SAMPAT ORLANDO	LTT	0	413.00	461.00	376.00	389.50	26.25	0.00	102.50	837	3,762.73
	SEINFELD TED	LTT	0	380.00	488.83	360.00	236.50	26.25	0.00	102.50	849	3,933.59
	SHEPPERD MATT	LTT	0	395.08	491.25	366.00	389.50	26.25	0.00	103.10	857	4,136.64
	SMITH CHRIS	LTT	0	434.44	454.92	402.56	389.50	26.25	0.00	107.10	857	4,241.07
	SMITH JOHN	LTT	0	401.00	481.20	382.00	389.50	26.25	0.00	103.10	863	3,951.04
	SMITH JOSEPH	LTT	0	405.00	480.00	372.00	389.50	26.25	0.00	102.50	852	4,014.78
	WATSON BRENDAN	LTT	0	393.50	476.24	461.74	389.50	26.25	54.00	103.10	938	4,456.25

To edit or delete a function, right-click the dimensions, and select that function, and select **Edit** or **Delete** from the menu (see below).

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	08+09	
BAIG SAIRA	LTT	170.75	403.50	408.00	404.00				26.25	0.00	102.50	103
BURNS DAVE1006	LTT	422.25	383.24	425.85	442.92				26.25	89.50	107.10	197
BURNS DAVE7777	LTT	--	--	--	--				--	--	103.10	103
CARTIER SHIRLEY	LTT	316.50	403.50	410.75	415.25				26.25	0.00	102.50	103
CLARK ARTHUR	LTT	457.45	396.22	408.00	449.22				26.25	0.00	103.10	103
CURRAN NANCY	LTT	129.50	403.50	392.00	412.00				26.25	0.00	102.50	103
DOUGLAS BOGDAN	LTT	462.75	387.91	407.50	479.75				26.25	48.00	109.50	158
FAZIO MERCEDES	LTT	258.50	403.50	400.00	414.00						2.50	103
HILLMAN JAKE	LTT	129.50	394.00	416.00	412.00						2.50	103
HUSTON GRACE	LTT	74.00	390.50	408.00	404.25							
JORDAN ANDREW	LTT	432.00	393.09	382.66	388.00							
MASTERS STEVE	LTT	400.00	490.50	400.00	423.00							
MONROE JANICE	LTT	468.15	452.45	401.40	457.12				26.25	30.00	103.10	103
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	103
PERRICELLI JOANNE	LTT	399.75	384.50	400.00	403.00	480.75	372.00	389.50	26.25	0.00	102.50	103
PUGLIESE NICHOLAS	LTT	137.50	403.50	408.00	412.00	461.00	372.00	389.50	26.25	--	--	--
ROCCA LUISA	LTT	314.50	403.50	408.00	404.00	479.00	415.00	389.50	26.25	0.00	102.50	103
SAMPAT ORLANDO	LTT	88.00	403.50	400.00	413.00	461.00	376.00	389.50	26.25	0.00	102.50	103

To display average amount per year, see the following (the **10** refers to the number of years defined in the system):



2008	2009	Average per Year	04+05	Total
0.00	102.50	277	869	4,022.35
89.50	107.10	315	863	4,527.75
--	103.10	10	--	216.51
0.00	102.50	293	863	4,185.48
0.00	103.10	307	836	4,312.40
0.00	102.50	272	862	3,953.48
48.00	109.50	320	893	4,570.28
0.00	102.50	284	843	4,066.48
0.00	102.50	273	862	3,969.43
0.00	--	253	842	3,629.43
11.00	103.10	298	851	4,239.47
--	--	295	824	4,072.58
30.00	126.10	303	835	4,327.28
--	--	--	--	--
0.00	103.10	307	824	4,299.83
0.00	102.50	296	853	4,209.33
--	--	261	833	3,703.73
0.00	102.50	294	894	4,232.98
0.00	102.50	266	837	3,865.23
0.00	102.50	280	849	4,036.09
0.00	103.10	298	857	4,239.74
0.00	107.10	308	857	4,348.17
0.00	103.10	281	863	4,054.14
0.00	102.50	288	852	4,117.28
54.00	103.10	320	938	4,613.35

**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 [Custom Reports](#).

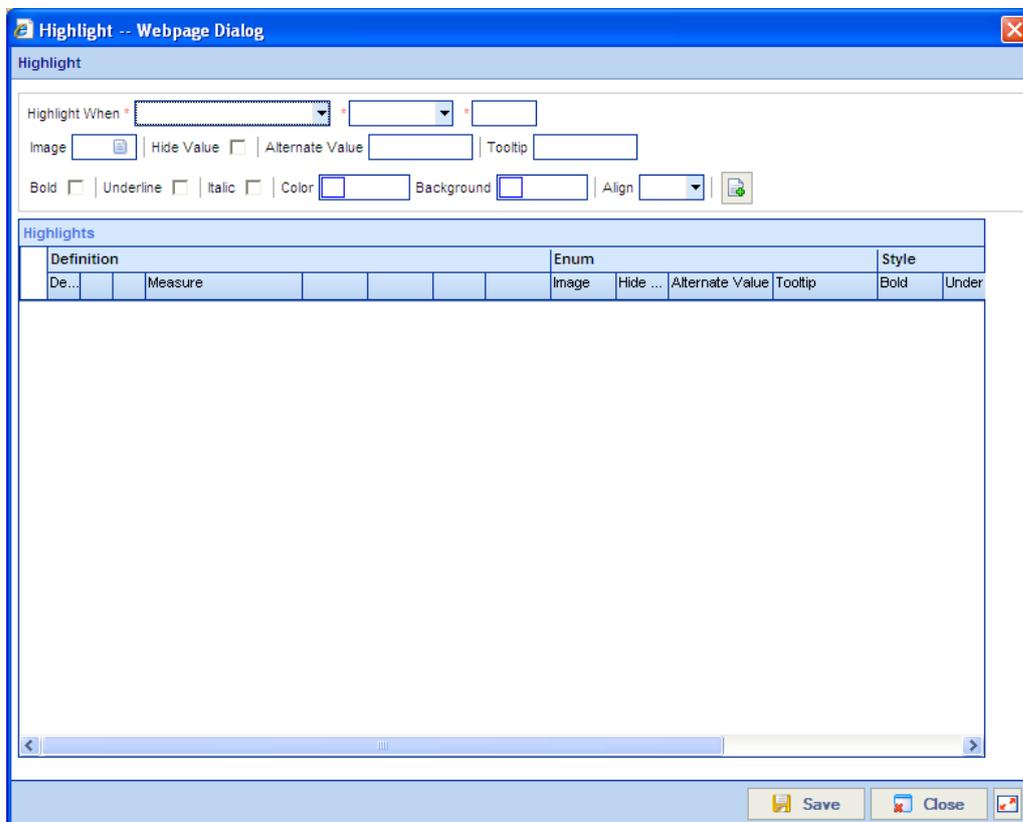
**NOTE:** Shortcut icons used to represent custom screens  are different from those used to represent regular system reports.



### Defining Highlights

To highlight any exceptional values in your analyses for visual chunking, 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:

**Highlight**

Highlight When \* Value \* Bigger \* 100.00

Image [icon] | Hide Value  | Alternate Value [ ] | Tooltip [ ]

Bold  | Underline  | Italic  | Color FF4500 | Background [ ] | Align [ ] |

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
	PERRICELLI JOANNE	LTT	399.75	384.50	400.00	403.00	480.75	372.00	389.50	26.25	0.00	102.50
	PUGLESE NICHOLAS	LTT	137.50	403.50	408.00	412.00	461.00	372.00	389.50	26.25	--	--
	ROCCA LUISA	LTT	314.50	403.50	408.00	404.00	479.00	415.00	389.50	26.25	0.00	102.50
	SAMPAT ORLANDO	LTT	88.00	403.50	400.00	413.00	461.00	376.00	389.50	26.25	0.00	102.50
	SEINFELD TED	LTT	431.75	345.00	433.50	380.00	488.83	360.00	236.50	26.25	0.00	102.50
	SHEPPERD MATT	LTT	412.50	405.58	392.00	395.08	491.25	366.00	389.50	26.25	0.00	103.10
	SMITH CHRIS	LTT	439.14	422.08	400.00	434.44	454.92	402.56	389.50	26.25	0.00	107.10
	SMITH JOHN	LTT	210.50	405.58	408.00	401.00	481.20	382.00	389.50	26.25	0.00	103.10
	SMITH JOSEPH	LTT	296.50	403.50	400.00	405.00	480.00	372.00	389.50	26.25	0.00	102.50
	WATSON BRENDAN	LTT	444.75	432.35	417.00	393.50	476.24	461.74	389.50	26.25	54.00	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:

- From the toolbar, click the **Export**  icon, and select either **HTML** or **Excel**:
  - If you select HTML, a page such as the following appears:

**Daily Data Analysis - Daily Attendance**

**On Columns**  
Dates Hierarchy All

**On Rows**  
EMPLOYEE (Employee Details/Shared) all, all  
Corporate Hierarchy All

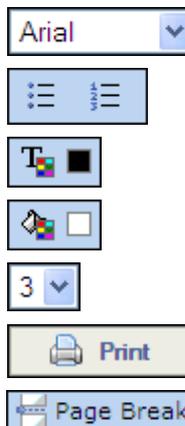
**Slicers**

Measures Quantity  
Modules Attendance  
Date/Period Daily  
Abs Dim All  
Weeks All  
Pay Categories Groups Total Attn.  
Week Day Thursday

		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	6,911.00	8,928.66	9,142.53	10,429.59	8,446.55	8,263.00	577.50	232.50	2,093.40
	NA - 1	--	--	--	--	--	--	--	--	--	--
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
CURRAI 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	--	--
MOHROE JAIME	LTT	468.15	452.45	401.40	457.12	448.17	386.79	236.50	26.25	30.00	128.10
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
PERRICELLI JOAINE	LTT	399.75	384.50	400.00	403.00	480.75	372.00	389.50	26.25	0.00	102.50
PUGLIESE NICHOLAS	LTT	137.50	403.50	408.00	412.00	461.00	372.00	389.50	26.25	--	--
ROCCA LUISA	LTT	314.50	403.50	408.00	404.00	479.00	415.00	389.50	26.25	0.00	102.50
SAMPAT ORLANDO	LTT	88.00	403.50	400.00	413.00	461.00	376.00	389.50	26.25	0.00	102.50

Perform the following actions if needed:

- Change the font
- Add numbers or bullets
- Change the text color
- Change the background color
- Change the font size
- Print the page
- Insert a page break into the text



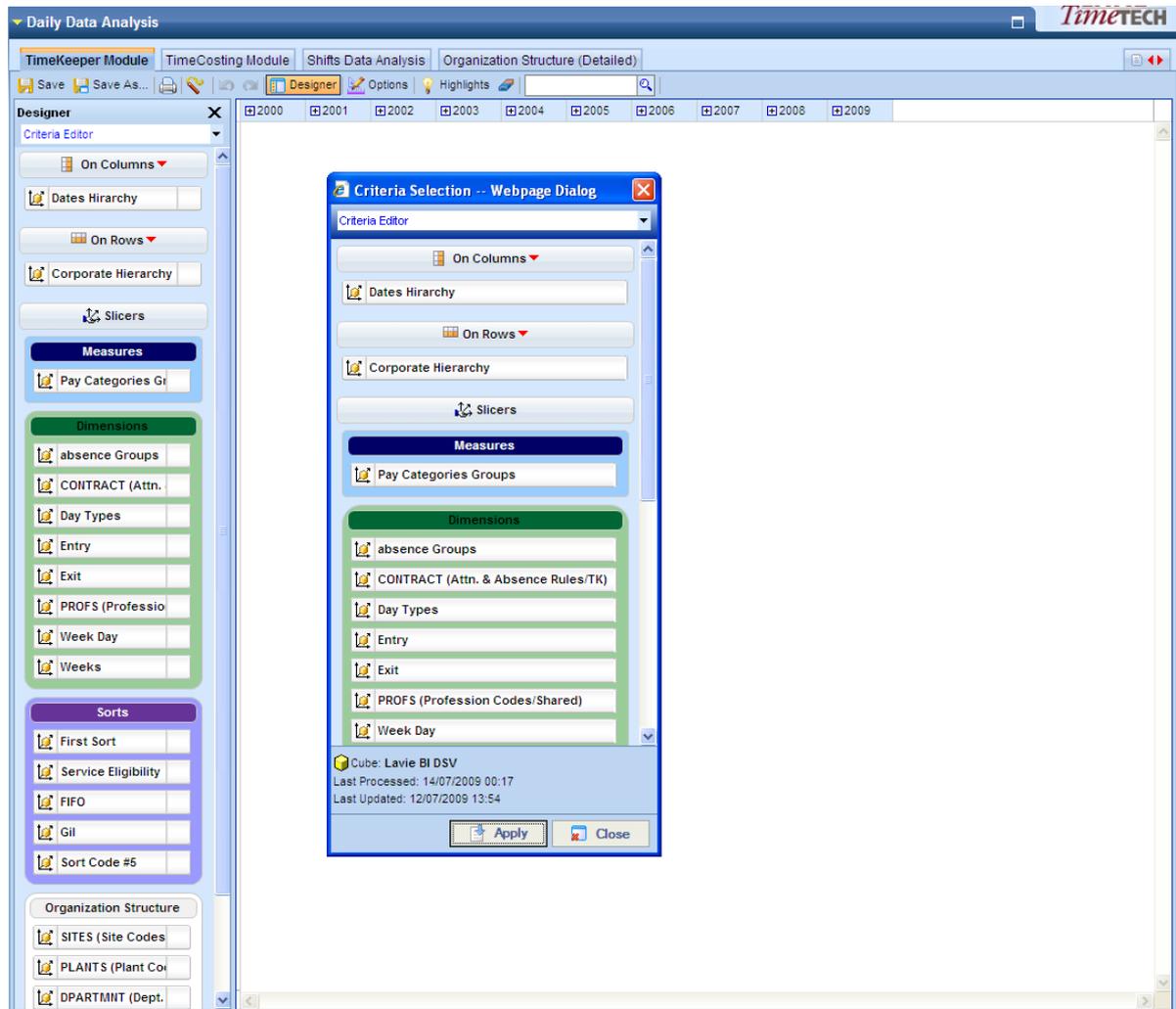
- If you select **Excel**, the report opens in spreadsheet form:

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	<b>User-Defined Analysis Daily Attendance</b>												
2				2000	2001	2002	2003	2004	2005	2006	2007	2008	2009
3	all	BAIG SAIRA	LTT	171	404	408	404	489	380	390	26	0	103
4		BURNS DAVE1006	LTT	422	383	426	443	469	393	394	26	90	107
5		BURNS DAVE7777	LTT										103
6		CARTIER SHIRLEY	LTT	317	404	411	415	499	364	390	26	0	103
7		CLARK ARTHUR	LTT	457	396	408	449	445	392	390	26	0	103
8		CURRAN NANCY	LTT	130	404	392	412	490	372	390	26	0	103
9		DOUGLAS BOGDAN	LTT	463	388	408	480	499	394	386	26	48	110
10		FAZIO MERCEDES	LTT	259	404	400	414	479	364	390	26	0	103
11		HILLMAN JAKE	LTT	130	394	416	412	490	372	390	26	0	103
12		HUSTON GRACE	LTT	74	391	408	404	462	380	390	26	0	
13		JORDAN ANDREW	LTT	432	393	383	388	456	395	390	26	11	103
14		MASTERS STEVE	LTT	400	491	400	423	450	374	390	26		
15		MONROE JANICE	LTT	468	452	401	457	448	387	237	26	30	126
16		NA - 222	NA - -1										
17		PARRA LUISA	Amano	442	432	416	434	454	370	390	26	0	103
18		PERRICELLI JOANNE	LTT	400	385	400	403	481	372	390	26	0	103
19		PUGLIESE NICHOLAS	LTT	138	404	408	412	461	372	390	26		
20		ROCCA LUISA	LTT	315	404	408	404	479	415	390	26	0	103
21		SAMPAT ORLANDO	LTT	88	404	400	413	461	376	390	26	0	103
22		SEINFELD TED	LTT	432	345	434	380	489	360	237	26	0	103
23		SHEPPERD MATT	LTT	413	406	392	395	491	366	390	26	0	103
24		SMITH CHRIS	LTT	439	422	400	434	455	403	390	26	0	107
25		SMITH JOHN	LTT	211	406	408	401	481	382	390	26	0	103
26		SMITH JOSEPH	LTT	297	404	400	405	480	372	390	26	0	103
27		WATSON BRENDAN	LTT	445	432	417	394	476	462	390	26	54	103
28													
29	<b>On Columns</b>												
30	<b>Dates Hierarchy</b>	All											
31	<b>On Rows</b>												
32	<b>EMPLOYEE (Employee Details/Shared)</b>	all, all											
33	<b>Corporate Hierarchy</b>	All											
34	<b>Slicers</b>												
35	<b>Measures</b>	Quantity											
36	<b>Modules</b>		מספר										
37	<b>Date/Period</b>		ימי										
38	<b>Abs Dim</b>	All											
39	<b>Weeks</b>	All											
40	<b>Pay Categories Groups</b>	Total Attn.											
41	<b>Week Day</b>	Thursday											
42													

### Opening a Moveable Instance of the Designer Pane

To open a moveable **Designer** pane that you can place in your desired location, do as follows:

1. From the toolbar, click the  icon. An additional **Designer** pane opens in the center of the screen.



2. Drag anywhere you wish for an easier work mode. You can close the default Designer pane on the left to provide more work space, if needed.

### 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	--	--	--	--	--	--	--	--	--	--

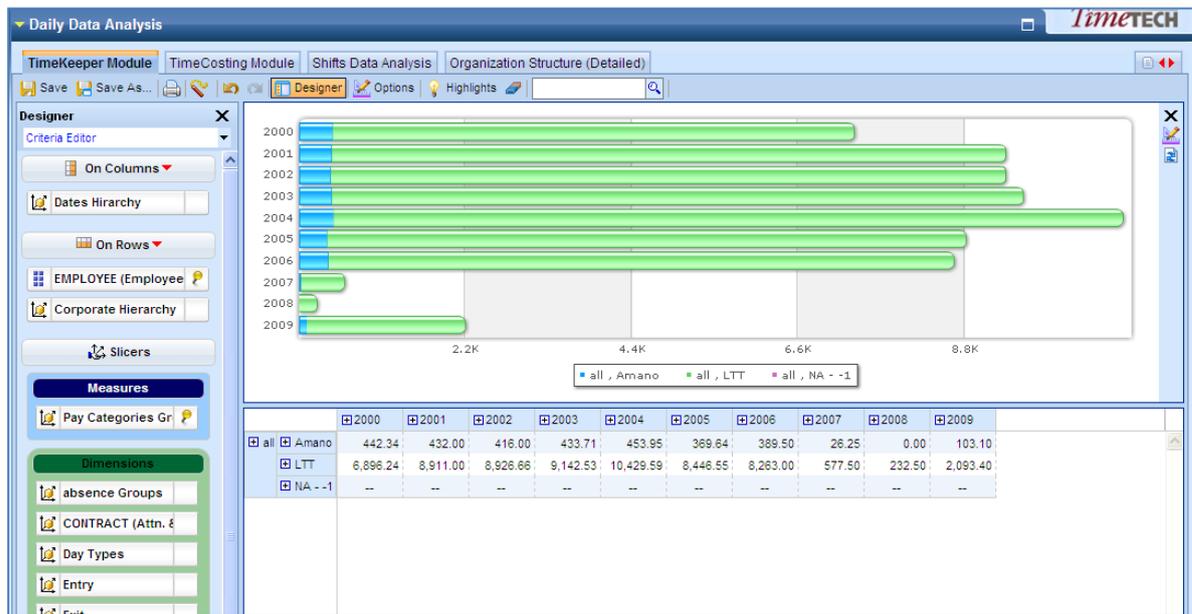
**After:**

		⊕ 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 generated 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**.
5. To change the chart types and options, click the  button on the right side of the graph.



### 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
	HUSTON GRACE	LTT	390.50	390.50
	JORDAN ANDREW	LTT	393.09	393.09
	MASTERS STEVE	LTT	490.50	490.50
	MONROE JANICE	LTT	452.45	452.45
	NA - 222	NA --1	--	--
	PARRA LUISA	Amano	432.00	432.00

**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	2001	2002	2003	2004
all	BAIG SAIRA	LTT	1			404.00	489.00
	BURNS DAVE1006	LTT	4			442.92	469.37
	BURNS DAVE7777	LTT	-				
	CARTIER SHIRLEY	LTT	3				
	CLARK ARTHUR	LTT	4				
	CURRAN NANCY	LTT	1				
	DOUGLAS BOGDAN	LTT	4			479.75	498.83
	FAZIO MERCEDES	LTT	2			414.00	479.00
	HILLMAN JAKE	LTT	1			412.00	490.00
	HUSTON GRACE	LTT				404.25	461.75
	JORDAN ANDREW	LTT	4			388.00	455.61
	MASTERS STEVE	LTT	4			423.00	450.00
	MONROE JANICE	LTT	4			457.12	448.17
	NA - 222	NA - -1	-			--	--
	PARRA LUISA	Amano		442.34	432.00	416.00	433.71

*Note: A context menu is open over the year 2000 column. The 'ZoomTo' option is selected, and the 'Quarter' sub-entry is highlighted with a red circle.*

			2000/Q1	2000/Q2	2000/Q3	2000/Q4	Total
all	BAIG SAIRA	LTT	--	--	84.00	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
	JORDAN ANDREW	LTT	106.00	110.50	102.50	113.00	432.00
	MASTERS STEVE	LTT	92.00	96.00	105.00	107.00	400.00
	MONROE JANICE	LTT	117.00	117.00	117.00	117.15	468.15
	NA - 222	NA - -1	--	--	--	--	--
	PARRA LUISA	Amano	87.80	128.33	110.50	115.71	442.34
	PERRICELLI JOANNE	LTT	92.00	104.00	97.00	106.75	399.75
	PUGLIESE NICHOLAS	LTT	--	--	32.00	105.50	137.50
	ROCCA LUISA	LTT	--	104.00	105.00	105.50	314.50
	SAMPAT ORLANDO	LTT	--	--	--	88.00	88.00
	SEINFELD TED	LTT	90.00	117.00	117.00	107.75	431.75
	SHEPPERD MATT	LTT	96.00	104.00	105.00	107.50	412.50
	SMITH CHRIS	LTT	109.96	116.83	113.80	98.55	439.14
	SMITH JOHN	LTT	--	--	105.00	105.50	210.50
	SMITH JOSEPH	LTT	--	96.00	97.00	103.50	296.50
	WATSON BRENDAN	LTT	112.00	108.00	108.00	116.75	444.75

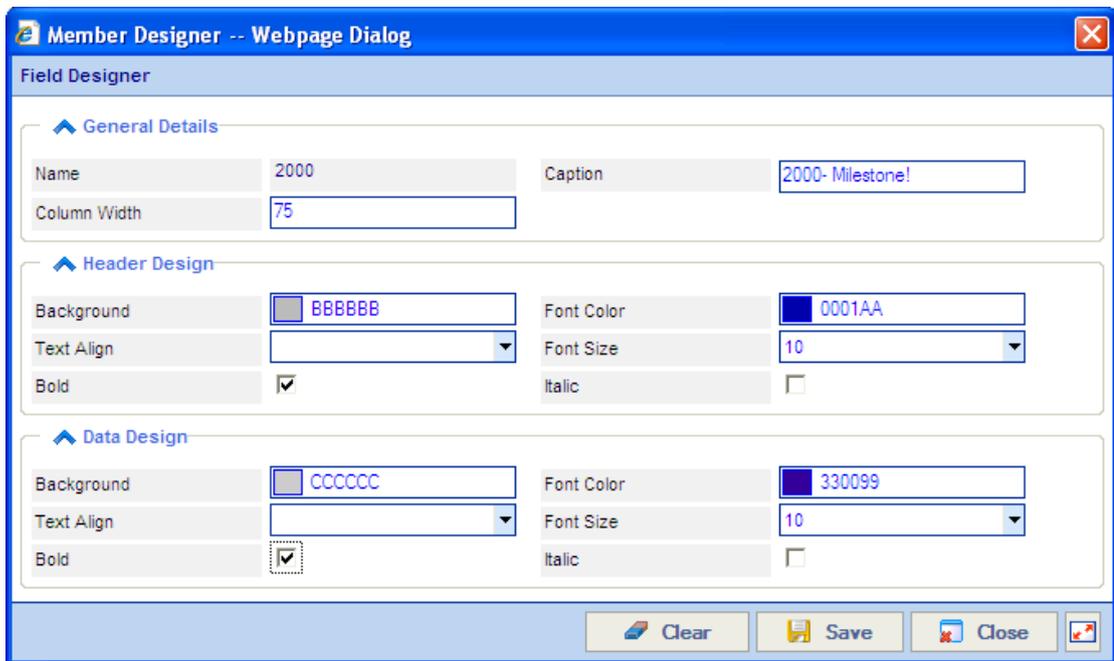
*Note: The column headers for the quarters (2000/Q1 through 2000/Q4) are circled in red.*

### 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.

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

1. 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.
2. Click **Clear** if you want to clear the settings. See the example for the **2000** column:



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

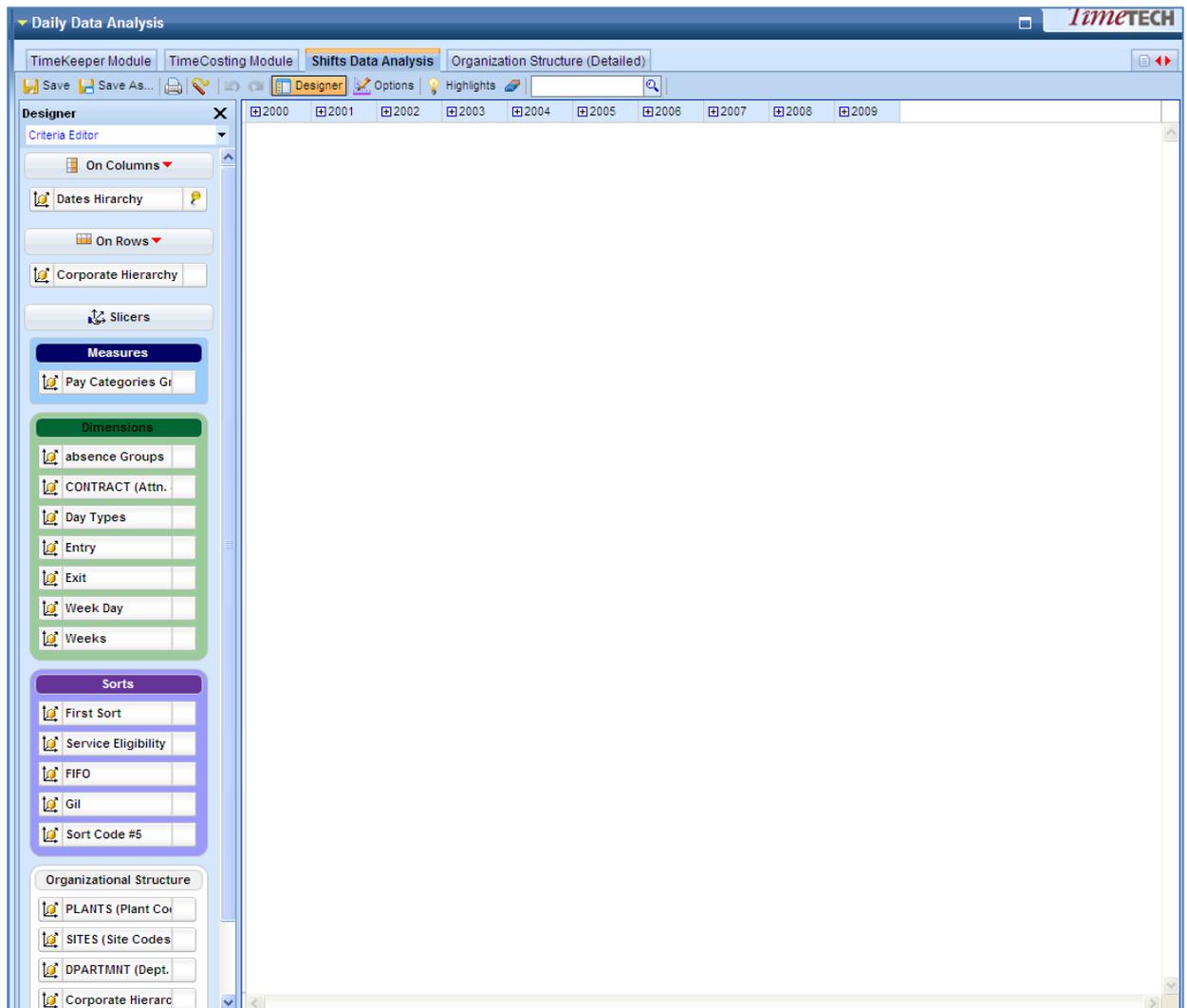
			⊕ 2000- Milestone!	⊕ 2001	⊕ 2002	⊕ 2003	⊕ 200
all	BAIG SAIRA	⊕ LTT	170.75	403.50	408.00	404.00	48
	BURNS DAVE1006	⊕ LTT	422.25	383.24	425.85	442.92	46
	BURNS DAVE7777	⊕ LTT	--	--	--	--	--
	CARTIER SHIRLEY	⊕ LTT	316.50	403.50	410.75	415.25	49
	CLARK ARTHUR	⊕ LTT	457.45	396.22	408.00	449.22	44
	CURRAN 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	--	--	--	--	--
	PARRA LUISA	⊕ Amano	442.34	432.00	416.00	433.71	45
	PERRICELLI JOANNE	⊕ LTT	399.75	384.50	400.00	403.00	48
	PUGLIESE NICHOLAS	⊕ LTT	137.50	403.50	408.00	412.00	46
	ROCCA LUISA	⊕ LTT	314.50	403.50	408.00	404.00	47
	SAMPAT ORLANDO	⊕ LTT	88.00	403.50	400.00	413.00	46
	SEINFELD TED	⊕ LTT	431.75	345.00	433.50	380.00	48
	SHEPPERD MATT	⊕ LTT	412.50	405.58	392.00	395.08	49
	SMITH CHRIS	⊕ LTT	439.14	422.08	400.00	434.44	45
	SMITH JOHN	⊕ LTT	210.50	405.58	408.00	401.00	48
	SMITH JOSEPH	⊕ LTT	296.50	403.50	400.00	405.00	48
	WATSON BRENDAN	⊕ LTT	444.75	432.35	417.00	393.50	47

4. Repeat for other dimensions if needed.

## Shifts Data Analysis

The **Shifts Data Analysis** screen enables you to view and analyze data relating to shifts defined in your corporate hierarchy.

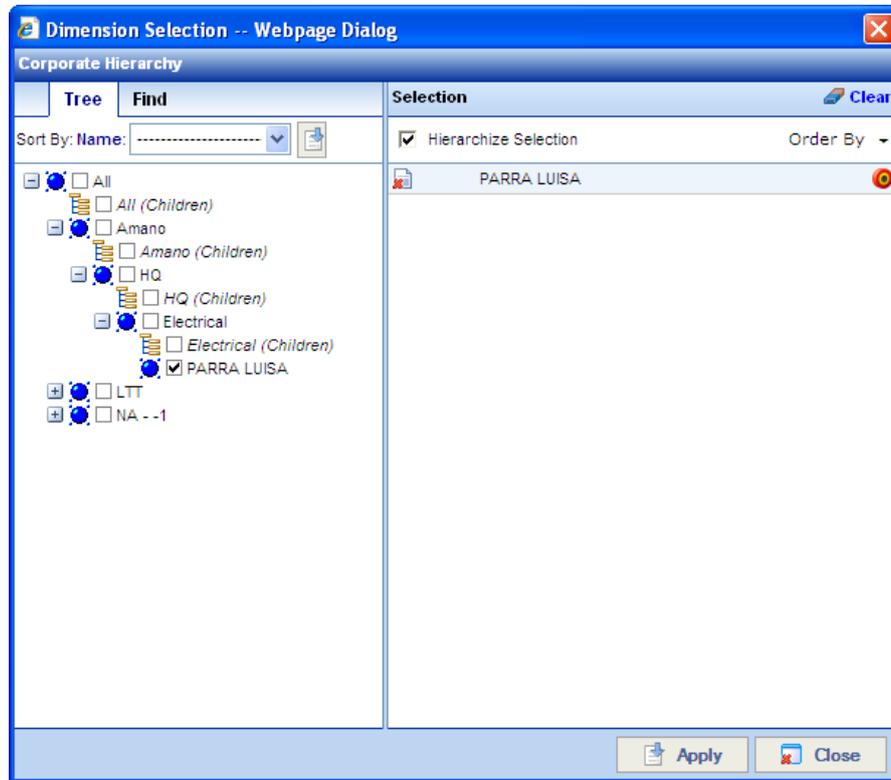
TBD



## Organization Structure (Detailed)

The **Organizational Structure (Detailed)** displays details about employees.

1. From the **Organizational Structure (Detailed)** screen, click **Organizational Hierarchy**, and drill down for a specific employee.



2. Click **Apply**. A properties chart appears:

organizational hierarchy

PARRA LUISA	
Name	Value
MID_INT	
HIRE FROM	1/1/1987
POSITION	
STREET	Unknown
CITY	Unknown
STATE	Unknown
ZIP	NA
PHONE1	Unknown
PHONE2	Unknown
EMAIL	Unknown
Site	HQ
Department	Electrical
Plant	Amano
HIRE TILL	12/31/2099
Sort3	1141
Sort4	0
SCD_GROUP	0
SCD_GROUP_Security	0

3. To export the chart to an Excel file, do as follows:
  - a. Click the icon.

- b. From the menu, select **Export > Excel**.