

## **iBrowse™ Set-Up**

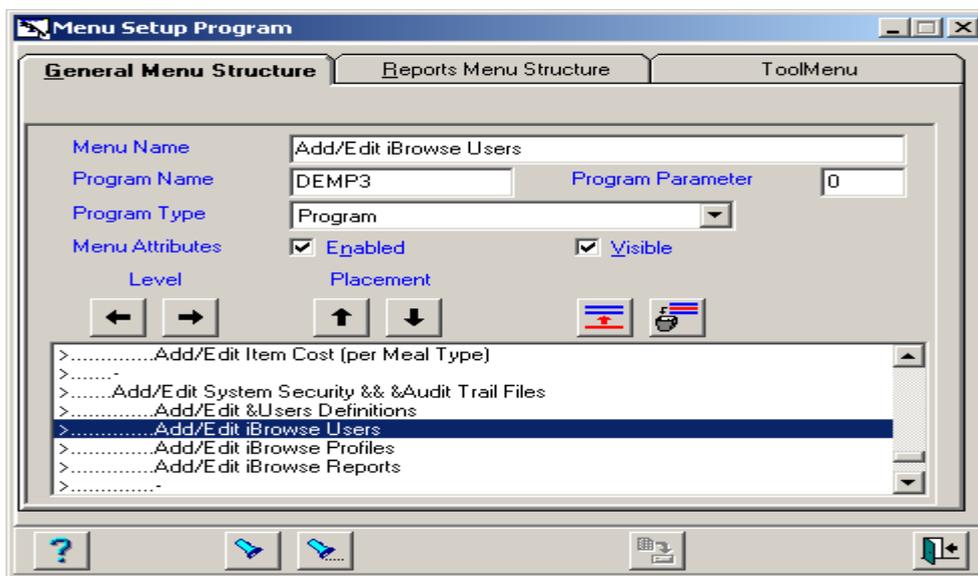
The iBrowse™ setup process is performed within TimeKeeper. The setup involves two programs:

- **Users' configuration in EMPLOY3 (EMP3)**
- **Profile configuration (PRFCNF)**

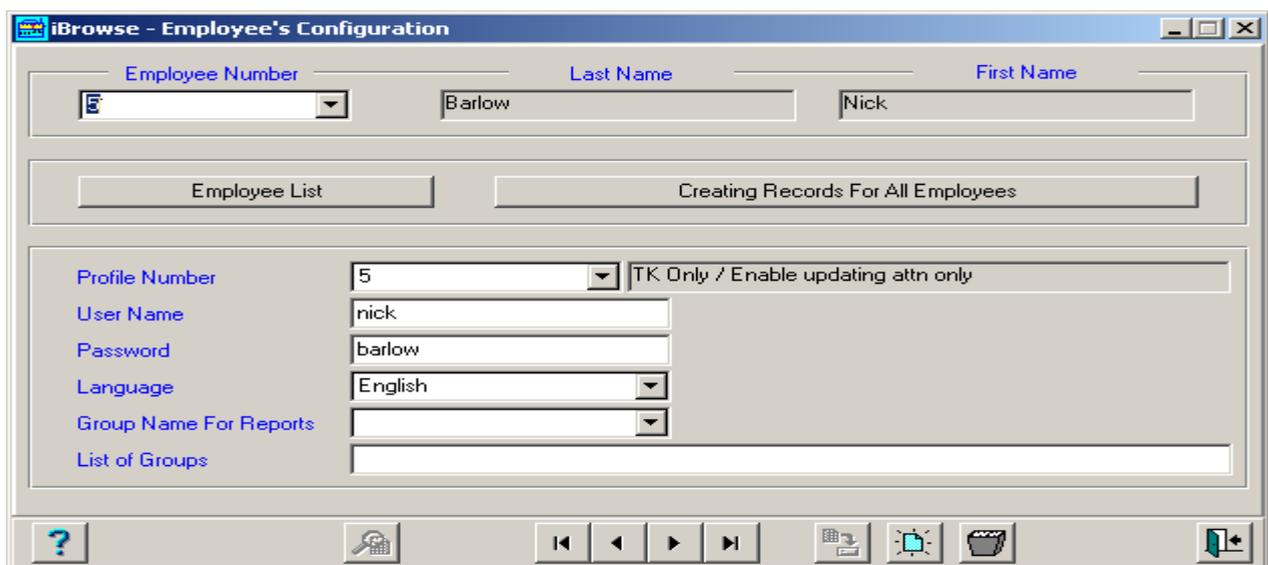
### **1. iBrowse™ Users Definition**

Similarly to "TK's Users Definition", "iBrowse™ User Definition" enables specifying details about iBrowse™ users i.e. [User name], [Password] and associate a user with an iBrowse™ profile (which provides further details related to customizing display options and work modes in iBrowse™).

**MENU** In order to add the "iBrowse – Employee Configuration" to the menu, use the following parameters:



iBrowse – Employees configuration screen



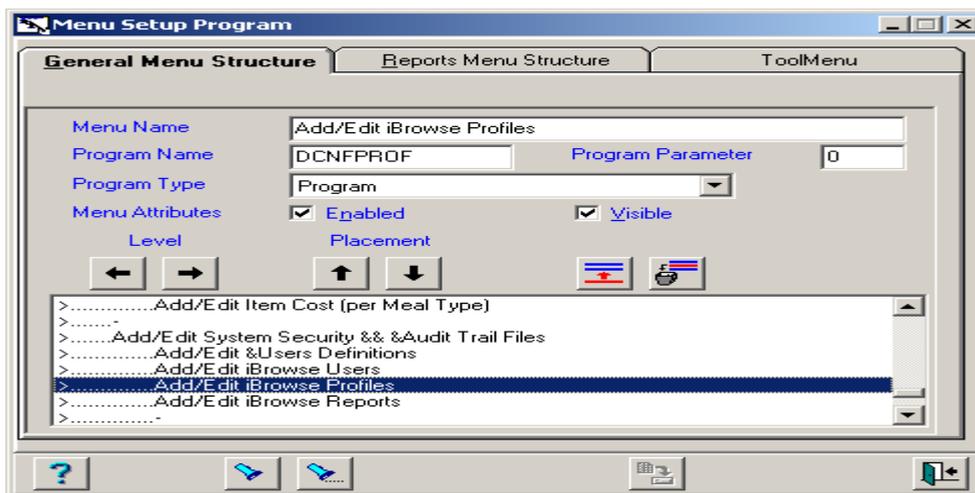
## Users and permissions

- **Standard user** – A Standard User may view only his own data (i.e. attendance and costing transactions). Any employee can be defined as a standard iBrowse™ user, requiring a unique Username (4 characters long) password (8 characters long) and associating the employee to a profile.
- **Supervisor** – A Supervisor may view other users' data (in addition to his own). Using this option, each manager/supervisor can monitor and (optionally) edit his employees' data online (i.e. via the internet/intranet). Any employee can be defined as a supervisor, provided:
  - a) His associated profile has been set to [**Allow User to Edit and Monitor Other Users' Data**].
  - b) The Group(s) which the supervisor is responsible for (i.e. may view and edit data) has been specified in "users definition".
  - c) A username (4 characters long) and password (8 characters long) have been specified.
- **External user** – A User that is not a TK employee. To set-up an external user, define the user in TK's Users (i.e. Setup menu - Add/Edit System Security and Audit Trail files – Add/Edit User Definitions). Define the user's name, password, profile and specifying the employees he may view/edit.

## **2. iBrowse™ Profile configuration definitions**

The profile configuration enables customizing both work mode and display options. By specifying a "set of rules" relating to such items as absence handling, number of in/out pairs, costing calculations, retroactive edits etc., you can configure the required display/work mode(s) according to specific customer and/or user needs. The configuration file includes six tabs: Attendance tab, Time Costing tab, General tab, Display tab, Dates tab and Time Sheet tab.

**MENU** In order to add the "iBrowse – Profile Configuration" to the menu, use the following parameters:



## 2.1 - Attendance Tab

### Time and Attendance display mode

- **Do not display In/Out punches:** iBrowse™ is used for labor-distribution or job-allocation only.
- **In/Out punches - Read only:** The user cannot enter or update the In/Out fields.
- **In/Out punches - Read only except for zero values:** The user may specify In/Out punches only when the fields equal to zero and the processed day is not the current day (i.e. valid only when editing previous dates). In all other cases, the In/Out fields are in "read only" mode.
- **In/Out punches - Read & Write:** All entries and adjustments in the attendance fields are acceptable. This option is mostly commonly used where iBrowse™ is used (in lieu of data collection terminals) as an electronic "clock".

Rows per day on daily / period edits screen – As each In/Out pair is a row in the daily editing screen, by specifying the number of pairs, you are setting the number of rows on a daily/period editing screen. You may define up to five (5) In/Out pairs.

### Per Diem (Specifically designed for the Israeli Market)

- **Yes** – Per Diem field will be available for entering per diem credits or amount.
- **No** – Per Diem field will not be available for entering per diem credits or amount.

### KM/ML (Specifically designed for the Israeli Market)

- **Yes** – KM/ML (Kilometers/Mileage) field will be available for reporting quantity of KM/ML.
- **No** – KM/ML (Kilometers/Mileage) field will not be available for reporting quantity of KM/ML.

### Absence display options

- **All** – All absences can be selected and modified by the user in the iBrowse™ daily edit screen.
- **Select** – A selected list of absences will be available for editing (i.e. selecting) to the user. After choosing the [**Select**] work mode, you define the valid absences using the [**Select**] button.



- **All display only** – “Read only” mode: The employee is able to view absences but not to change (i.e. update, edit or delete) absence transactions.

#### In/Out Punches + Duration

- **In/Out Punches** –
- **Duration** – This option is inactive and it is a preparation for future enhancements.

#### Possible punches type

Possible punch types are the available options within “report” combo box in “daily editing” screen. The options are **Attendance, Full absence, Partial absence, Call back, On-Call (Stand by) and On-Duty**. In order to add an option to the list, check the relevant box e.g. attendance, full absence etc.

#### Use the clock button

By default, each employee reports (i.e. types manually) In & Out punches. The clock button replaces the “manual attendance entry” option with a virtual clock: clicking the virtual clock inserts the time from the server to the relevant In/Out field.

Disabling the “manual attendance entry” option and inserting the “clocking time” from the server, is most commonly required in environments with “strict” auditing requirements.

- **Yes** – Clock button enabled. A virtual clock will be added to the daily editing screen. As per the period editing screen, it would be read only i.e. the employee will not be able to report on a period basis.
- **No** – Clock button disabled (default). All attendance data is manually entered.
- **Extended** – Enables retroactive updates i.e. the “clock button” option will be enabled for the current date ONLY (this option will be disabled for previous days hence users may update retroactive dates when required).

#### Apply In/Out pairs check

Determines whether entering a single punch (i.e. In or Out) during the day is valid or not. If selected, an employee entering only one punch will receive an error message (i.e. Missing In/Out) while saving the data.

The “Pairs check” feature must be disabled, as if the “clock button” option is enabled, the employees always report a single punch i.e. when he arrives at 08:00 and before he leaves at 18:30.

- **Yes** – Apply In/Out pairs check i.e. all entries must be in pairs.
- **No** – Pairs check disabled. The employee may report a single (In or Out) punch.

## 2.2 – Time Costing Tab

**Configuration Profile Definitions**

Table Number: 1 | Table Description: Inactive

Attendance | **Time Costing** | General | Display | Dates | Time Sheet\Reports

Time Costing Display Mode: End of Job or Duration (End > 0 Will Update TCDAY)

Time Costing Display Options:

First Level ("Order")	Yes	Cost Center	No
Second Level ("Batch")	No	Quantity	No
Third Level ("Part")	No	Machine	No
Fourth Level ("Process")	Yes	Group	No

Maximum Number of MRU Items: 7

Maximum Number of Look Up Items: 100

Full absence cancel TC: No

Use The Clock Button: No

Check missing data for TC: All TC employees

Jobs are mandatory: No | Use Related Levels: No

### TimeCosting display mode

- **Disable** – The user does not report job costing via iBrowse™.
- **Start/End job + calculated duration** – [Duration] is calculated according to the Job Start & End time i.e. [End time – Start time]. As duration is automatically calculated, the user cannot edit it.
- **Duration only** – The employee reports duration for each job.
- **Start job only** – When specifying this option note that (a) the duration field will not be displayed and (b) the costing vs. attendance variance will be ignored.
- **End job only** – When specifying this option note that (a) the duration field will not be displayed and (b) the costing vs. attendance variance will be ignored.
- **Start of job or duration (start>0 will update TCDAY)** – Flexible. The user can enter either Duration or Start Of Job. If the value in [Job Start] is non-zero, [Job start] will update the Daily Job Activity file (TCDAY).
- **End of job or duration (end>0 will update TCDAY)** - Flexible. The user can enter either Duration or End Of Job. If the value in [Job End] is non-zero, [Job End] will update the Daily Job Activity file (TCDAY).

### Time Costing display options

Specify the required TC levels (as per the user needs and the TC configuration file). As in TC, it is possible to select up to 4 TC levels. To select a TC level, select "Yes" in the relevant level field (i.e. first level [Yes], second level [No] etc.) In addition, you can add the following costing details: [Department], [Quantity], [Machine] and [Group].

Maximum no of MRU items



MRU (Most Recently Used) items are the jobs most recently reported by a specific employee. iBrowse™ saves MRUs for each employee in order to simplify the job assignment process (for the employee). Instead of searching the entire job list (e.g. Orders, Processes etc.), the employee may choose from a shorter list, which is created based on his latest job assignments. We recommend specifying up to 20 MRUs (as by specifying a larger MRU list, you lose the advantage of using a short and compact list).

#### Maximum number of look up items

Whether or not a user uses the MRU option, s/he may search the job costing tables (i.e. order, batch, part & process as required). To optimize network load, the number of records displayed may be limited.

#### **Report jobs mandatory (full feature functionality is available from iBrowse V2R4)**

The following refers to a profile where TC reporting is enabled. Firstly, we would like to clarify that regardless of this feature (i.e. "Report Jobs mandatory"), when reporting through the daily screen, the user will not be able to submit attendance information without specifying the costing information.

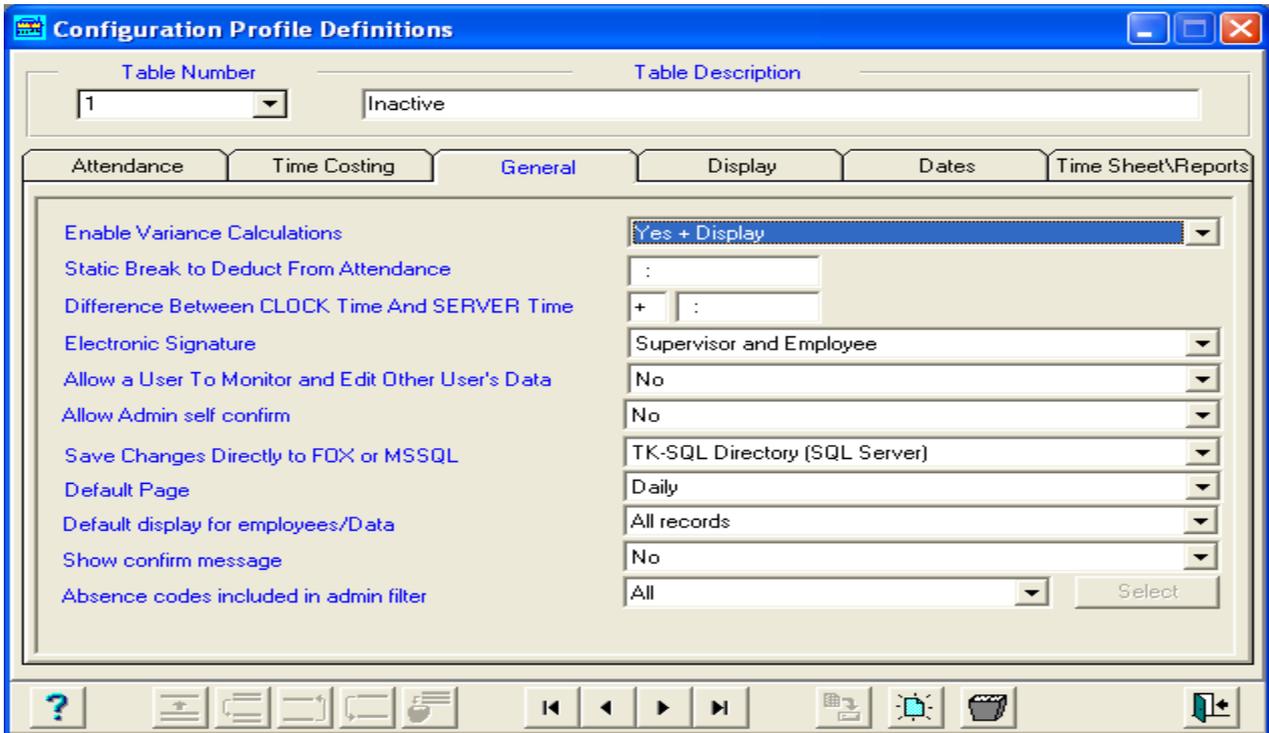
Hence, a job reporting is by default mandatory when referring to the daily screen. "Report jobs mandatory" applies on the "period edits" i.e. **if there are records with attendance reported and costing not reported**. In this case, the following options are available:

- **No** – Submitting data is not mandatory.
- **Yes** – Submitting at least one job per day is mandatory.
  
- **Yes (Even if Attn was not reported)** – Submitting at least one job per day is mandatory even if there is no Daily record.
  
- **Yes (Excluding the current date)** – Submitting at least one job per day is mandatory when there is attendance, not including current date.
  
- **Yes (Even if Attn was not reported, not including current day)** - Submitting at least one job per day is mandatory even when daily attendance is missing (not including current date).

#### Check missing data for TC:

- All TC employees.
- Direct employees without default.
- All TC employees without default.

## 2.3 – General Tab



### Enable variance calculations

- **No** – Ignore variance between attendance total to costing total.
- **Yes + Display**: The variance between attendance and costing will be calculated and displayed. If total attendance > total costing, the variance (i.e. attendance-costing) will be **positive & blue colored**. If total attendance < total costing, the variance (i.e. attendance-costing) will be **negative & red colored**.
- **Yes, If variance exists disable submit** - The variance between attendance and costing is calculated and displayed. If variance exists, the employee must adjust the costing transactions so all attendance-costing variances disappear.

Note: Variance calculation mode cannot be enabled while selecting [**Duration**] in [**Time Costing Display Mode**] in the TimeCosting tab.

### Difference between the clock time and the server time

This feature has been specifically designed in order to address the multiple time zones issue. Firstly, we would like to clarify that having multiple time zones is an issue only when using the clock button (in any other case, the hours are reported by the operator/employee therefore time zones are not an issue).

In order to address the problem, the profile will hold the time difference (i.e. in hours) from the server time e.g. iBrowse server is located in New York, and an employee is reporting [ENTRY] at [07:32] from LA. As the time difference between NY and LA is 3 hours back, iBrowse profile is to be set in [- 3.00].



#### Electronic signature

- **Disabled** – Supervisor or Employee approval is not required.
- **Supervisor only** – A check box (designating supervisor's approval) will be added to both the daily & the period browser, on a daily basis. Once this option is checked (i.e. the supervisor has approved that day), the employee cannot submit further modifications for the approved day.
- **Employee only** - A check box (designating employee's approval) will be added to both the daily & the period browser, on a daily basis.
- **Supervisor and Employee** – Two check boxes (one designated supervisor's approval and the other designated employee's approval) are added to both the daily & the period browser, on a daily basis. Once the [Supervisor] option is checked (i.e. the supervisor has approved that day), the employee cannot submit further modifications for the approved day.

#### Allow user to monitor and edit other users' data

- **No** – Default. Each user may edit and monitor his/her own data.
- **Yes** – Each employee that is associated with the profile (i.e. within "employee 3" screen) can monitor and edit other users, according to the [**Database Access Options**] in the "users definitions" screen.

#### Allow Admin self confirm

- **No** – Administrator allowed authorizing only employees who are under his supervision.
- **Yes** – Default

**Note:** The administrator should be defined in USERS file with a profile number. Employees are defined to a supervisor is in the "Database Access By" tab of USERS file.

#### Save changes directly to FOX or MS-SQL (This option is inactive and will be removed)

- **TK-SQL Directory (SQL Server)** – Data is saved in MS-SQL tables i.e. in TK-SQL directory (**Inactive**).
- **iBrowse Directory (SQL Server)** - Data is saved in MS-SQL tables in iBrowse directory

#### Default Page

Default page is the first page loaded, after logging into iBrowse™. As this feature is defined within the "Profile Configuration" and the profile is associated with an employee (i.e. within EMPLOY3 screen), it is possible to set the default page per employee. Each screen within iBrowse™ may be selected as a default page i.e. **Daily**, **Period edits** and **Time card**.

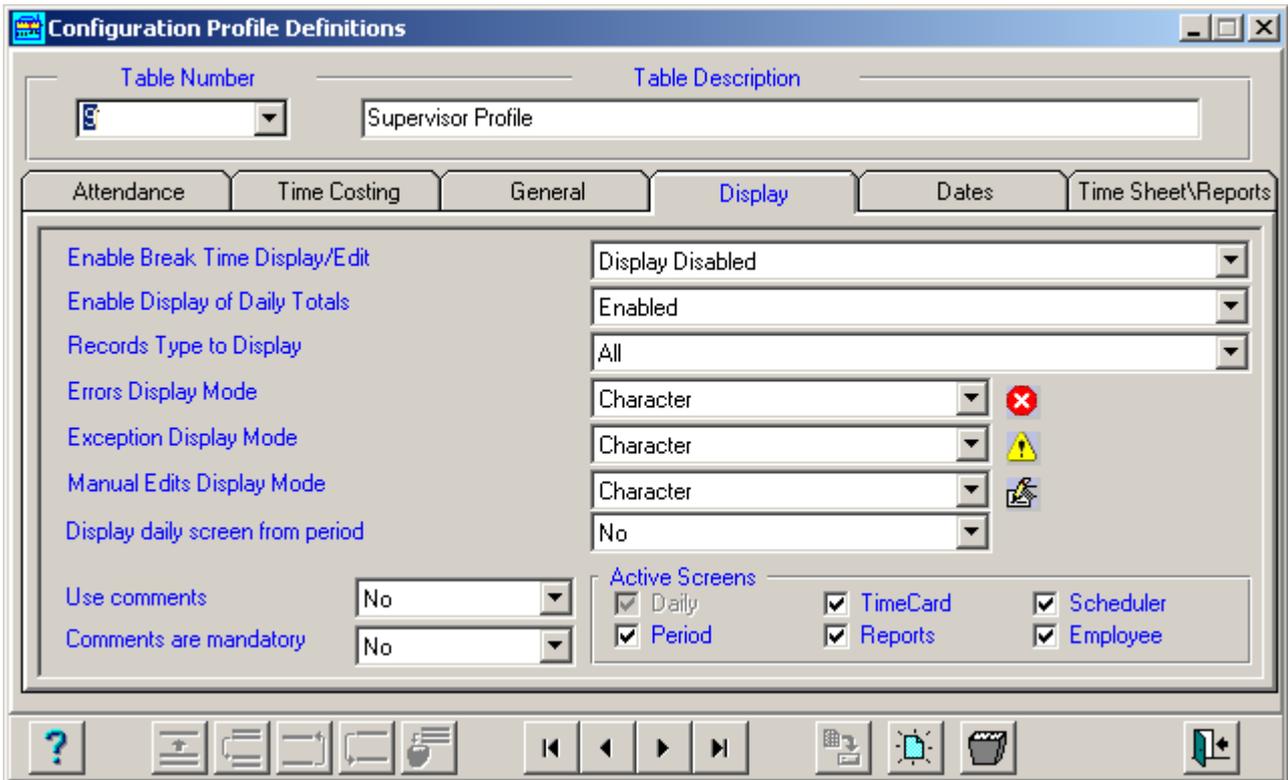
Report fields [**Report 1**], [**Report 2**] and [**Report 3**]: When using iBrowse™ in conjunction with TK2000 (which enables generating HTML reports) you can specify any 3 of TK's reports in these fields.

Update TK after supervisor's authorization – Do not transfer data to TK's database without e-signature.

#### Show confirm message –

- **Yes** – Confirmation message will appear after the data had been successfully saved.
- **No** – No confirmation message will be appear (data is saved as is)

## 2.4 – Display Tab



### Enable break time display & Edit

- **Display disabled**
- **Display Enabled**

### Enable display of daily totals

- **Disabled** – Do not display daily totals in Daily/Period editing screen.
- **Enabled** - Display daily totals Daily/Period editing screen.

### Records type to display

- **All**
- **Errors only**
- **Errors & exceptions**
- **Errors + exceptions + manual updates**

Where (a) **Errors** are records that cannot be calculated from some reason e.g. missing entry, missing exit etc. (b) **Exceptions** are cases which differ from the employee's contractual rules e.g. late entry, early exit etc. (c) **Manual updates** records have been updated manually i.e. not imported by clock polling.

### Errors / Exceptions / Manual updates display mode

Each category (i.e. errors, exceptions and manual updated) may be displayed in one of the following options:

- **Color** – Selectable (i.e. customize) color for display
- **Character** – The following characters can be selected

 - **Error**

 - **Exception**

 - **Manually updated**



#### Use Comments

- **No** – Comments functionality is disabled.
- **List only** – Comments enabled (reasons are available from a LAREASON pre-defined list).
- **Remarks only** – Comments enabled, free text mode).
- **List &Remarks**– Comments enabled (The user will be required to provide a reason and a free-text option will be available).

#### Comments are mandatory

- **Yes** - The user MUST specify a reason (daily!) whenever a modification was entered.
- **No** - Comments are optional.

#### Active Screens:

In these fields you define which screens will be displayed in the system. The available screens are: Daily, Period, TimeCard, Reports, Employee master and Scheduler.

## 2.5 – Dates Tab

The screenshot shows the 'Configuration Profile Definitions' window with the 'Dates' tab selected. The 'Table Number' is set to 1 and the 'Table Description' is 'Inactive'. The 'Dates' tab contains the following settings:

- Enable Retroactive Edits:** Current Previous & Future Dates
- Warn On Retro Edits:** No
- Limit Edit Dates:** According To Limit Of Retro Edits
- Retroactive Edits Allowed Only For The Previous XX:** 30
- Select Period For Display:** Current Pay-Period
- Type of Pay-Period Selections:** Select Dates From\Till (Calendar)

### Enable retroactive edits

The "retroactive edits" option determines the date access range i.e. which dates the employee may access within the daily/period-editing screen? The following options are supported:

- **Current date only** - Access to previous dates is denied (i.e. edits on the current day only).
- **Current Previous & future dates** - The access to current, previous and future dates is enabled
- **Previous dates only** – The access to the current and future dates is disabled
- **Previous Dates & future Absences dates** - The access to current dates and future Absences is enabled
- **Current and previous dates** – The access to both current and previous dates is enabled.

### Retroactive edits allowed only for the previous XX

In addition to specifying the [**Retroactive Edits**] option, you must specify the amount of days that may be edited retroactively. This option is disabled when the "**Disable Calendar - Edits only**" is selected in the [**Enable Retroactive Edits**] field.

### Limit edit dates

Following are additional restrictions for retroactive edits, as follows:

- **According to the limit of retro edits i.e.** the days specified in [**Retroactive Edits Allowed for**] field.
- **Only current pay-period** – The employee may edit dates in the current pay-period only.
- **Current and previous pay periods** - The employee may edit dates in both the current and the previous pay-periods.
- **Current pay period + cutoff day** - The employee may edit retroactive dates in the current pay-period, until a certain day within the relevant pay period (i.e. a "cutoff" day). The "cutoff" day is pay-period oriented e.g. if the specified cutoff day is "2" and the pay-period is Weekly, then the date referred to is Monday.

**Note:** If one of the options 2-4 is selected, the value in [**Retroactive Edits Allowed Only for the Previous XX**] field is ignored.



#### Select the period for display

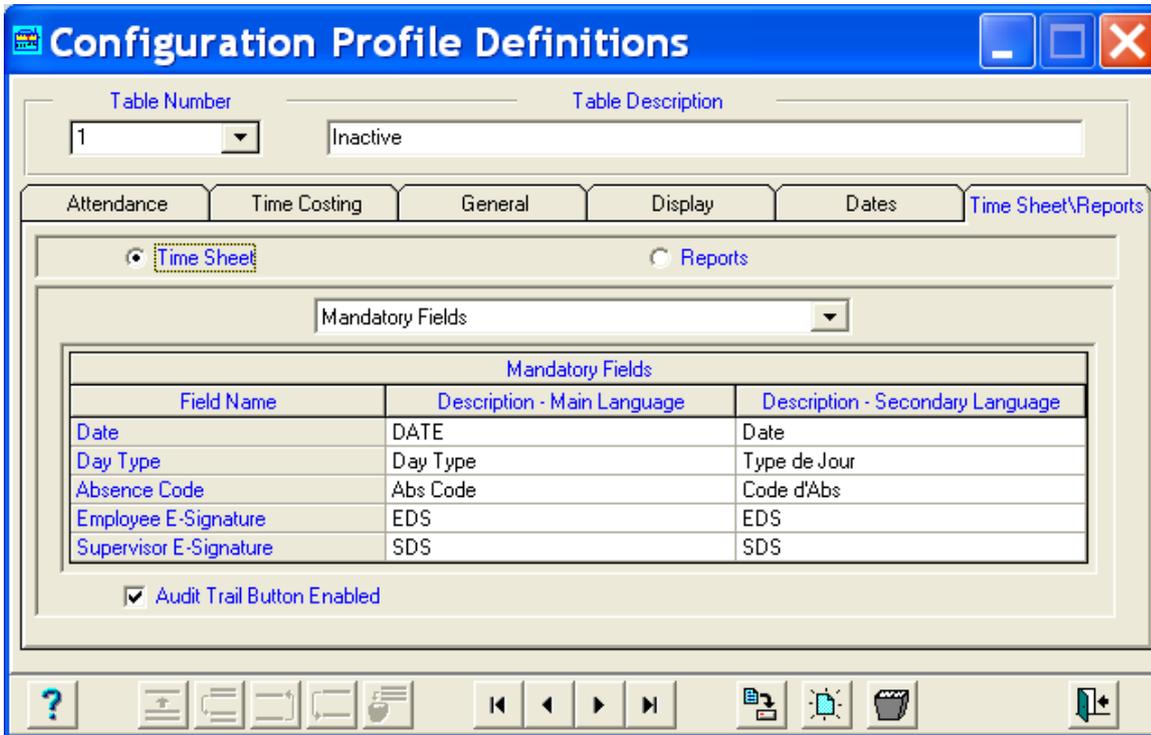
Specify the default period to be displayed in the "Period editing" screen. The options are **Current pay-period, Previous pay-period** and **Two pay-periods back**. As the field specifies the default period to display, the employee may change the selection on "period editing" screen (according to his needs).

#### Type of pay period selections

The [**Type of Pay-Period Selection**] option addresses the pay-period selection issue i.e. how to select a pay-period in both "period editing" and "period timecard" screens. Following are the alternatives:

- **Select dates from/till (calendar)** i.e. the employee will specify a date range
- **Select a period** i.e. the employee will select the relevant pay period.

## 2.6 – Time Sheet tab



The "Time Sheet" tab enables defining for each field its description. The field's description is actually the name of the field, translated to the primary (or secondary) language. You may specify for each field two descriptions i.e. for primary and secondary language.

In order to simplify the translation process, the fields have been grouped into five types e.g. fixed fields, punches, daily fields, period fields and ABSFOLLOW fields. Each field type includes its specific fields (i.e. punches includes In/Out punches, on duty punches etc). Choosing the field type loads the relevant fields to translate.

Following are the available field types:

- **Display fixed fields** - Fixed fields are Date, Day type, Absence, Employee, EDS, SDS.
- **Display types of punches** – Punch types are In/Out, On-call, On-duty etc.
- **Fields to display from daily file** – Pay categories from the daily file.
- **Fields to display from Period file** - Pay categories from the period file.
- **Fields to display from Absfollow file** – Accessing absence follow data e.g. balances etc.

## 2.7 – Reports

Reports: Enables defining 10 standard reports from TimeKeeper / TimeCosting.

