

PersonaWare



PersonaWare Turbo Attendance

v5.0

Users Guide and Manual

PersonaWare
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1.0 Overview and Install Options

1.1 Overview

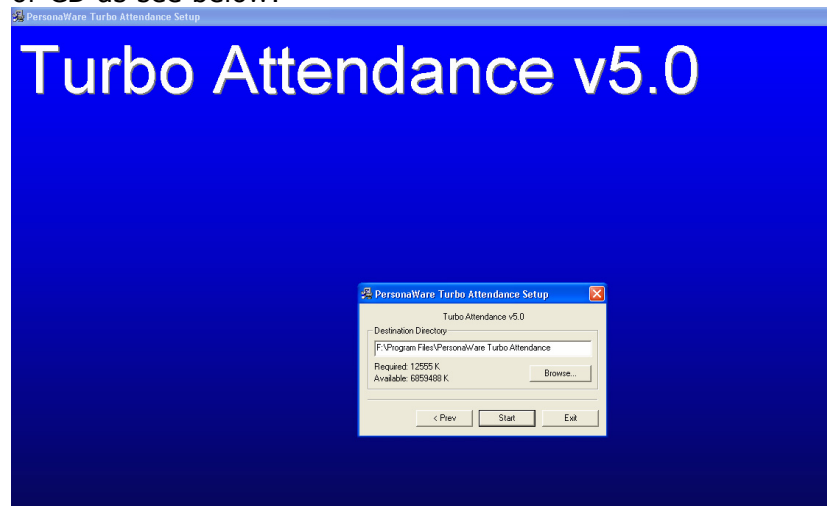
Turbo Attendance is designed to provide the most cost effective solution for your company. Deploying, setting up and configuring is easy to do. There are no consultants or implementation cost associated with getting up and running.

The Turbo Attendance system is designed to be friendly and helpful. It will assist in managing your company's daily Attendance and time off activities. Turbo Attendance can be used by small companies with ten or less employees to a company with thousand of employees spanning in many geographical areas. Turbo Attendance can accommodate up to 99,999 employee folders.

Turbo Attendance uses the latest technology and utilizes industry standard best practices and proven use cases analysis for a superior feature rich product line. Likewise, Turbo Attendance will take advantage of the latest computer hardware and advanced display technology. Minimum hardware requirement is a Pentium 450 MHz; a Pentium III 1GHz or higher with 256MB of memory is recommended for optimum computer productivity. The minimum screen resolution is 800 X 600 dpi. We recommend 1024 X 768 or higher resolution to view all functionality. Turbo Attendance works with Windows XP, Windows 2003 Server, Windows 2000, Windows NT 4.0 and even Windows Me, 98 and 95. We recommend Windows 2000, XP or higher.

1.2 Installing and Getting Setup

The first step is to run the installation program from the website download or CD as see below:





The default installation folder is in your program files\PersonaWare Turbo Attendance.

If installing a multi-user Enterprise system, or if using Turbo Attendance for Managers or Turbo Attendance for Employee reference the following for additional information: www.PersonaWare\help.htm

1.3 Basic Concepts

Filing Cabinets – The Filing Cabinet is a virtual company, organization, or division.

Each Filing Cabinet is associated with one attendance policy.

Each Filing Cabinet holds one or more folders.

Folders - Each employee, non-employee and contractor is represented by a folder.

Each folder has associations to the filing cabinet and one policy. The policy association is via the filing cabinet or directly via the folder.

Policies - Each policy is a set of rules governing attendance attributes, configurations and settings.

1.4 Basic Understanding

You should read this entire document but **pay special attention to section 3.4.** This is the basis of configuring attendance and appears to be the most important section in understanding the basic concepts of attendance management for most people.

2.0 Getting Started

The following are the basic concepts:

2.1 Filing Cabinets

The Filing Cabinet is a virtual company, organization, division, location or other. The Filing Cabinet holds your employee folders. Each Filing Cabinet contains properties and settings specific to itself including but not limited to the following:

- Reporting is at a Filing Cabinet level
- Security is at a Filing Cabinet and global level



- Departments are at a Filing Cabinet level
- Attendance policies are associated with a Filing Cabinet but are global

The following is the main toolbar. See the references to the Filing Cabinet below:



Notice the items in red above. This is the easiest way to access the management of your Filing Cabinets. You can also manage your Filing Cabinet via the File menu.

To setup a new Filing Cabinet click create on the toolbar and enter the appropriate information in for your organization. (For Policy information see section 2.2 and section 4.)

2.2 Attendance Policies

2.2.1 Accessing Attendance Policies via Filing Cabinet Window

Attendance Policies allow you to instruct Turbo Attendance as to your company or organizations Attendance Policy. Once this Attendance policy is created it can be assigned to the Filing Cabinet and each Folder within the Filing Cabinet inherits this policy. You can override the Filing Cabinet default policy within the folder if you like. Assigning the policy at the Filing Cabinet level saves some repetitive data entry later. See below:



Click on the Attendance Policy button and add or edit a policy as shown below:

Click on the configure button to define the attendance configuration for each leave type necessary.



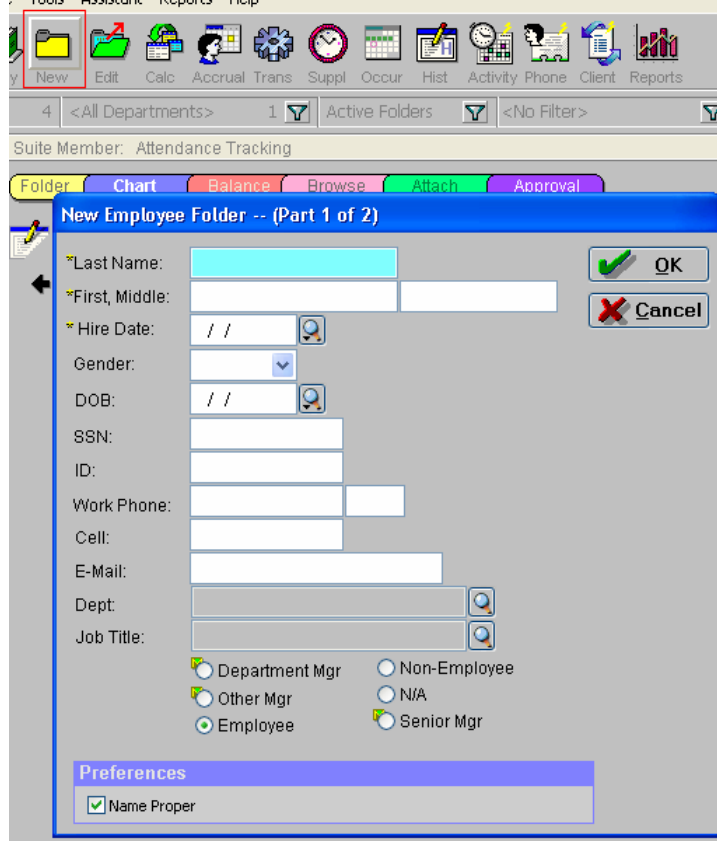
(See section 4 more information on Policies.)

2.3 Employee Folders

Each employee, non-employee and contractor is represented by a folder. All relative information to this employee is contained within the folder. See the below toolbar for easy access to create and manage employee folders:



Click on new to create a new folder as shown below:



Once you enter the new employee information in (step one) you will see the following second step, Edit Employee Folder Window:



Edit Employee Folder

General Properties | **Attendance Properties**

System ID: 7

Automatically Save Between Folder Navigation

Basic Information

*Last Name:

*First, Middle:

Gender:

DOB:

*Hire Date:

Term Date:

SSN & ID:

Work Phone:

Cell:

E-Mail:

Status:

Dept:

Job Title:

Department Mgr Non-Employee
 Other Mgr N/A
 Employee Senior Mgr

OK Cancel Apply Add

Note there are two tabs: General Properties and Attendance Properties available as seen above and below:

Edit Employee Folder

General Properties | **Attendance Properties**

System ID: 7

Automatically Save Between Folder Navigation

Attendance Properties

Change Policy >>

Policy:

[View and Edit Attendance Policy](#)
[Forwarding Balances](#)
[Accrual Properties](#)

Attendance Type	Accrual Initial Start	Period Start Date	Period Level	Anniversary
<input type="checkbox"/> Administrative				
<input type="checkbox"/> Bereavement				
<input type="checkbox"/> Compensatory				
<input type="checkbox"/> Family				
<input type="checkbox"/> FMLA				
<input type="checkbox"/> Jury				
<input type="checkbox"/> Other				
<input checked="" type="checkbox"/> Sick	01/01/2004	01/01/2004	Level 1	January 1
<input type="checkbox"/> Unauthorized				
<input checked="" type="checkbox"/> Vacation	01/01/2004	01/01/2004	Level 1	January 1

OK Cancel Apply Add



Within the folder you have the ability to edit the folder information of the employee and attendance information as well. The attendance information on the attendance properties tab relates to the policy you define but with the dates specific to the employee folder.

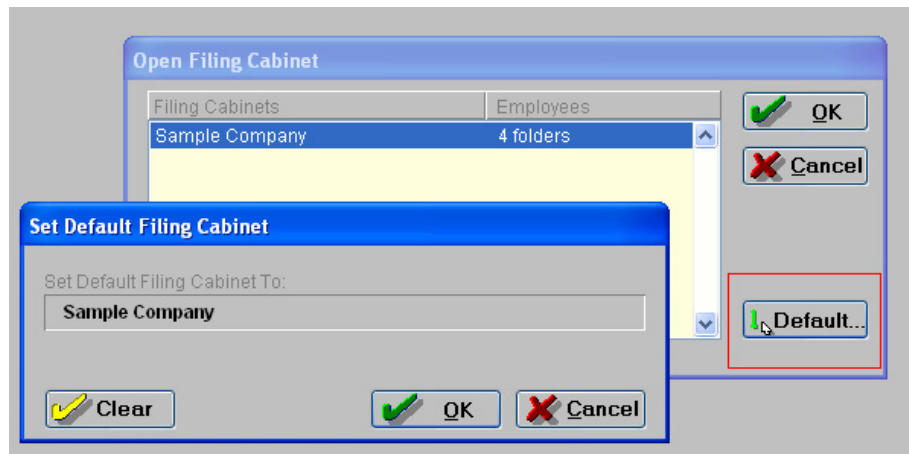
Setting up the initial date for the employee accrual ensures that the employee is positioned at the correct accrual level. This specifies the annual rollover date. If your company has leave starting on the calendar period of January 1 then specify January 1 of the year the employee was hired on. If accrual is based on employee hire date specify the employee hire date.

The period start date should be the most recent calendar or employee anniversary date and not more than 1 year from today.

3.0 How To

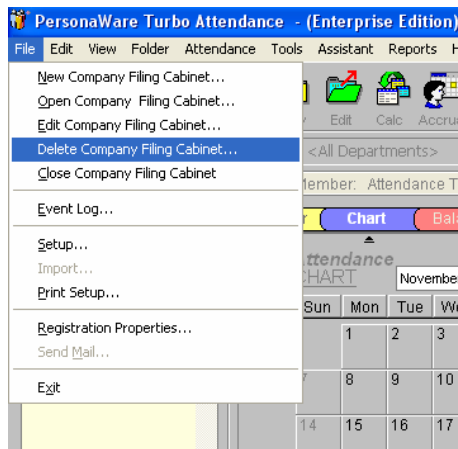
3.1 Setting a Filing Cabinet to load on Startup

Go to the File menu and select open or open a Filing Cabinet from the toolbar. Select a Filing Cabinet from the list and click the Default button, then ok (see below). The next time you load Turbo Attendance this Filing Cabinet will load automatically.



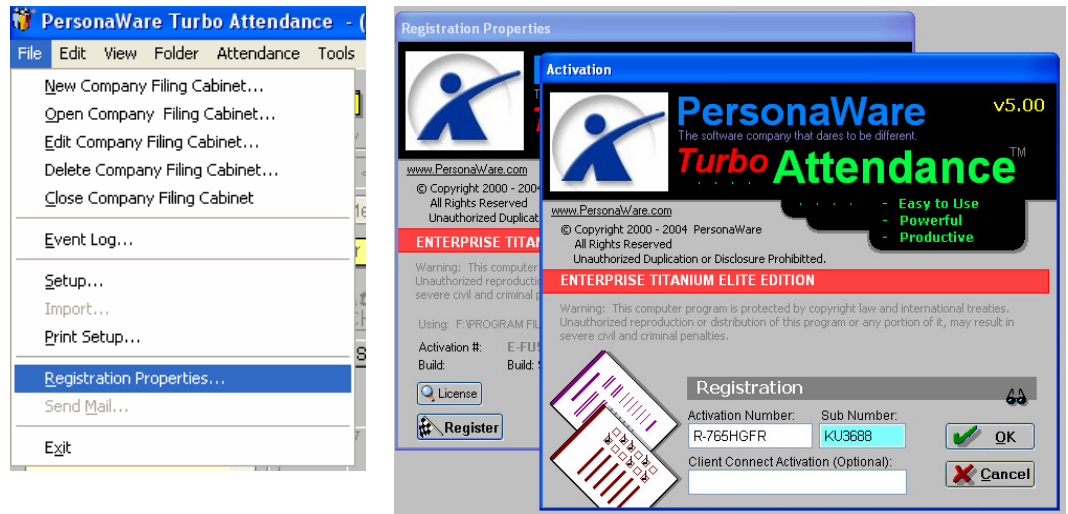
3.2 How to Delete a Filing Cabinet

Open the Filing Cabinet you wish to delete. Then go to the File menu and select Delete Company Filing Cabinet (see below).



3.3 How to Register Turbo Attendance

Go to the File menu, select Registration Properties and then click on the Registration Button (see below). Enter the appropriate activation number and subscription number that PersonaWare provides you upon registration.



(Sample activation and stub numbers provided above.)

3.4 How to get Employee Accruals to Work

What you need:

- At least one Filing Cabinet
- One or more Configured Policies
- One or more Employee Folders



This is by far the most difficult and most requested question from customers. Employee Accruals can be understood in five parts. Understanding these are the keys to understanding how to setup Turbo Attendance. They are as follows:

- Identifying your companies "seniority" level structure
- Identifying the number of hours assigned to each level
- Identifying the allocation interval of leave over the entire period
- Specifying initial start for accrual for each employee
- Specifying the current period start date

Generally most companies have a flat or tiered structure for assigning leave. See chart below of example:

Company A

Leave Type	Amount	Interval	Annual Amt	Level / Step
Sick	3.33 hrs	monthly	40 hours	<n/a>
Vacation	.7692 hrs	weekly	40 hours	0-2 years
Vacation	1.538 hrs	weekly	80 hours	3 and above

In this example for **Company A** it shows that all employees regardless of seniority get one week of sick leave per year allocated monthly. It also shows that if you are a new employee you start out getting weekly amounts of .7692 (or less than one hour) per week of sick leave. However, when you are an employee for 3 or more years you start to accrual at 2 weeks annually. Turbo Attendance provides for up to eight levels of seniority. You specify the company's level structure and number of hours assigned to each level in the policy (see section 2.2 and 4.2).

For specifying the allocation interval see section 4.3

For specifying the initial start date, see section 2.3 and 4.2.

For specifying the period start date, see section 2.3 and 4.2.

There are three dates that should be understood well and they are:

Hire Date – The date the company officially hired the employee. The hire date does not affect accruals.

Initial Start Date – The date the employee accrual is based on for seniority purposes.

Period Start Date – this is the date of the current period and should not be more than one year from today.



Example: Entering new employee John Doe into the system on Nov 15, 2004. (This is because you just purchased Turbo Attendance and employee John Doe as been an employee for about 5 years.)

John Doe was hired on June 1, 1999 and therefore...

Hired Date = **June 1, 1999**

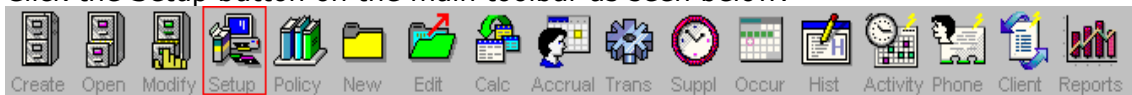
Initial Start Date = **July 1, 1999** (because there is 30 day probation period per this organization)

Period Start Date = **July 1, 2004**

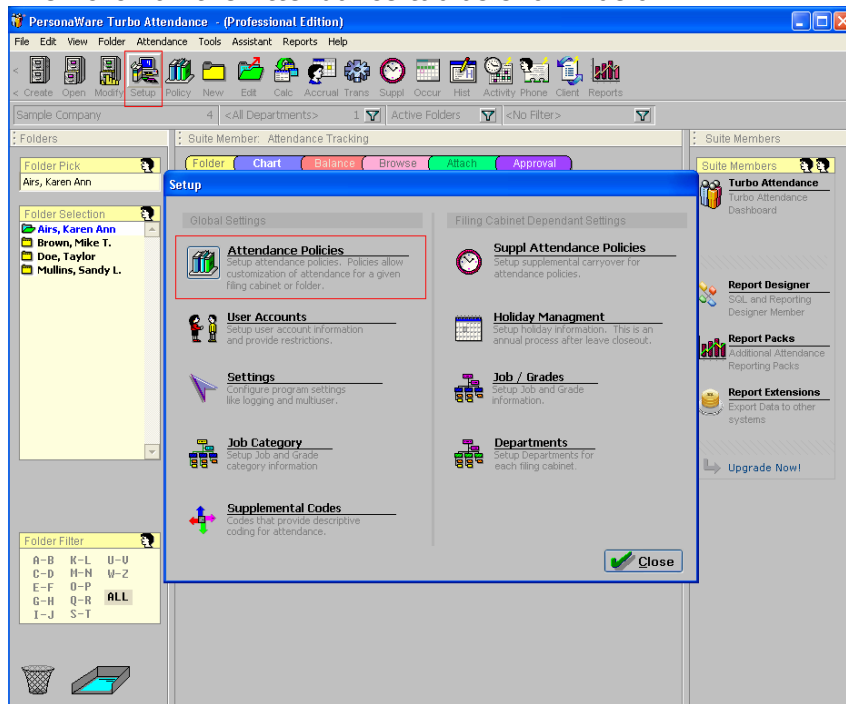
If this employee is setup in this manor (see end of section 2.3 and also section 4.4) then accrual is based on the July 1 date and any forwarding amounts should be entered in the balanced forward screen (section 4.5 and 6.3). This ensures the correct allocation level is configured.

4.0 Configuring an Attendance Policy

Click the Setup button on the main toolbar as seen below:



Then click on the Attendance tab as shown below:





Click on the Add button to create a new Attendance Policy. Each Attendance Policy has the following attributes:

4.1 Attendance Types

There are nine configurable and flexible attendance types:

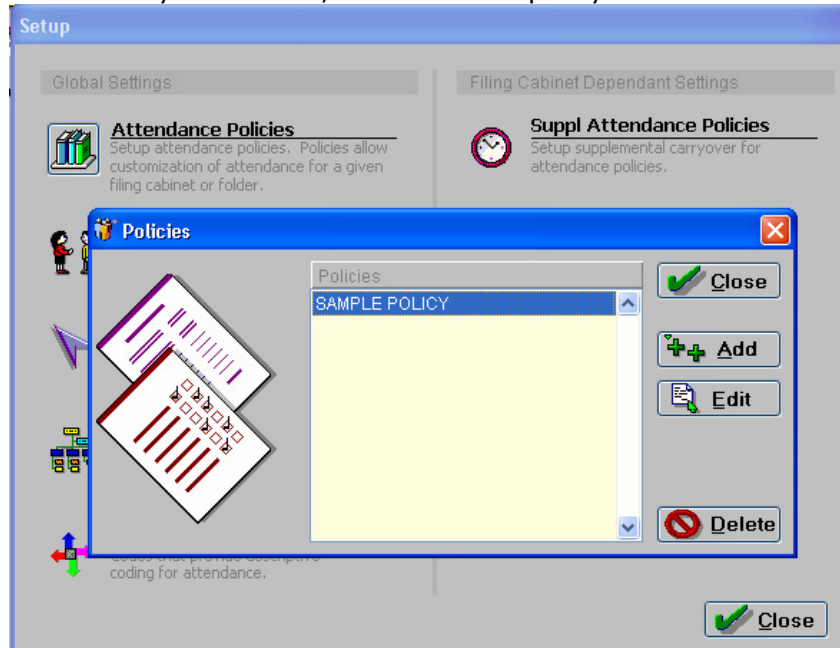
- Administrative
- Bereavement
- Compensatory
- Other
- Sick
- Family
- Jury
- Unauthorized
- Vacation

4.2 Managing Policies

You need a minimum of one policy. You can use as many policies as you like, however most companies use between 1-3 different policies.

To setup a new policy go to setup on the toolbar and click Attendance policies as shown in section 4.0.

From here you can add, edit or delete policy as needed.



To create a new policy click Add. The following window appears:



Add Policy

*Policy Name: OK Cancel

Probation Period: days

Configuration Worksheet

Activate (Type)	Accrual Class	Default Period Basis	Calendar Date (if applicable)
<input type="checkbox"/> Administrative			
<input type="checkbox"/> Bereavement			
<input type="checkbox"/> Compensatory			
<input type="checkbox"/> Family			
<input type="checkbox"/> FMLA			
<input type="checkbox"/> Jury			
<input type="checkbox"/> Other			
<input checked="" type="checkbox"/> Sick	<input checked="" type="radio"/> Automatic <input type="radio"/> Tracking Only	<input checked="" type="radio"/> Calendar Period <input type="radio"/> Hire Date	January 1 - December 31
<input type="checkbox"/> Unauthorized			
<input checked="" type="checkbox"/> Vacation	<input checked="" type="radio"/> Automatic <input type="radio"/> Tracking Only	<input type="radio"/> Calendar Period <input checked="" type="radio"/> Hire Date	

Notice that the above policy is named My New Policy and in this example we have configured the policy to have Sick leave based on Calendar period, and the Vacation leave based on hire date of the employee. Click OK to continue.

The following window appears:

Edit Attendance Policy -- (My New Policy)

Types	Status
Administrative	<Not Using>
Bereavement	<Not Using>
Compensatory	<Not Using>
Family	<Not Using>
FMLA	<Not Using>
Jury	<Not Using>
Other	<Not Using>
Sick	Automatic
Unauthorized	<Not Using>
Vacation	Automatic

[Sick] Policy Configured: Automatic Class

Seniority Level	Seniority Duration	Calculated Period
1: 40 hours. Go to next level after	1 years (blank for continual)	0-1 yrs
2: 80 hours. Go to next level after	2 years (blank for continual)	2 and up
3: hours. Go to next level after	years (blank for continual)	
4: hours. Go to next level after	years (blank for continual)	
5: hours. Go to next level after	years (blank for continual)	
6: hours. Go to next level after	years (blank for continual)	
7: hours. Go to next level after	years (blank for continual)	
8: hours. Go to next level after	years (blank for continual)	

Carryover
Maximum Rollover (in days):
(Leave blank to carryover all.)

Accrual Calc Options
Configure accrual options for this policy

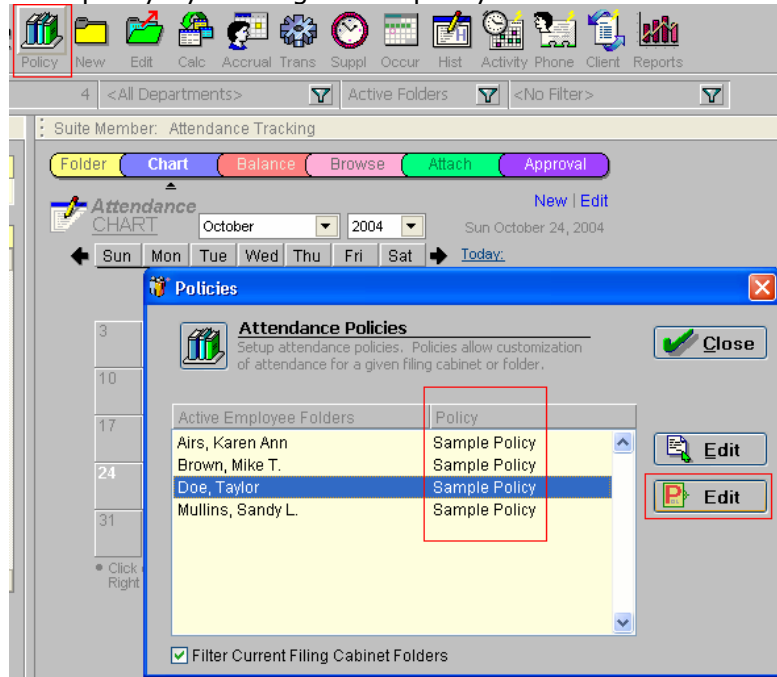
Apply OK Cancel

The sample shows 40 hours for the first year, then 80 hours thereafter for Sick leave. You can enter up to eight levels. Configure each type you have selected to use.

If you need to add or modify any Attendance type you can click on the configure button.



Note: You cannot delete a policy that is in use. To see what folders are using what policies click on the policy button on the toolbar. You can edit each policy by clicking on the policy edit button shown below:

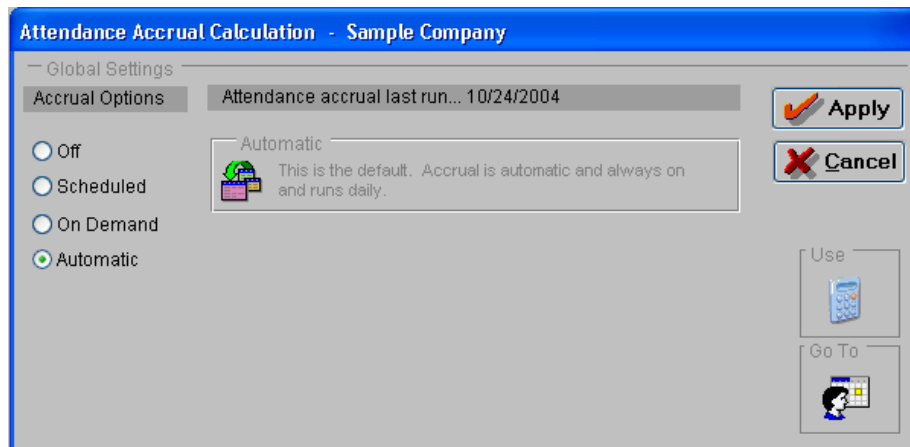


4.3 Attendance Accrue Methods and Levels

You can set your automatic accruals to work with the following:

- Off - No accrual runs for the period
- On demand - Runs accrual up to the current day.
- Scheduled - Allows you to specify the accrual point to run. This is perfect for companies that need to allocate attendance monthly, by-weekly, weekly, quarterly or any other specific day.
- Automatic - Runs daily and is always up-to-date with the current day.

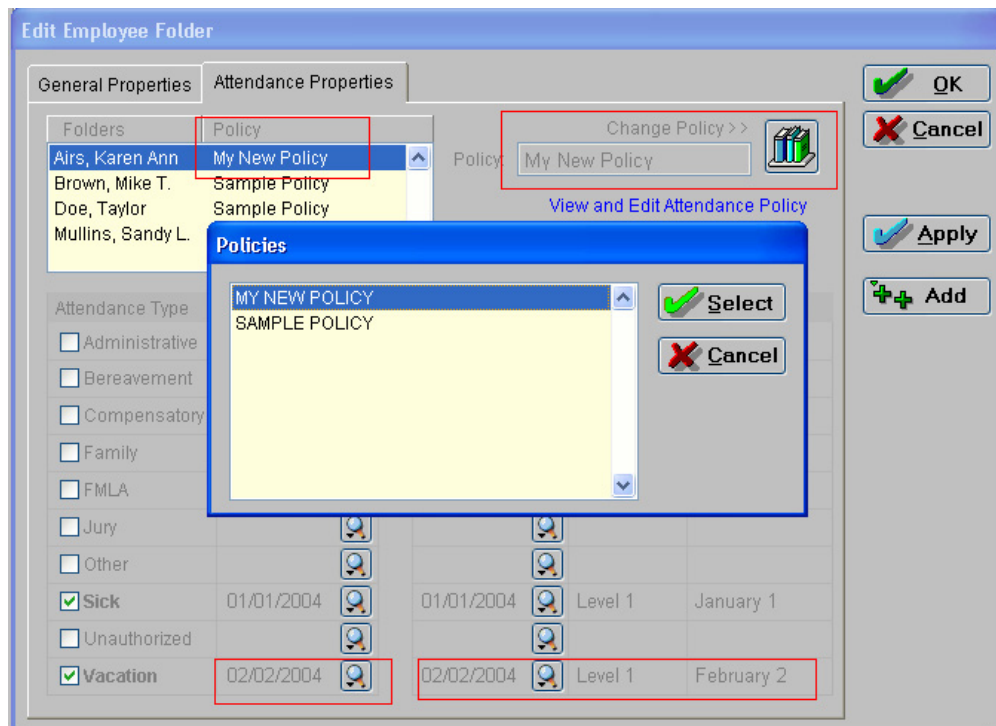
As shown below:



The easiest way to access Accrual Calculation is by clicking on the Calc button on the toolbar.

4.4 Setting up Attendance at the Folder Level

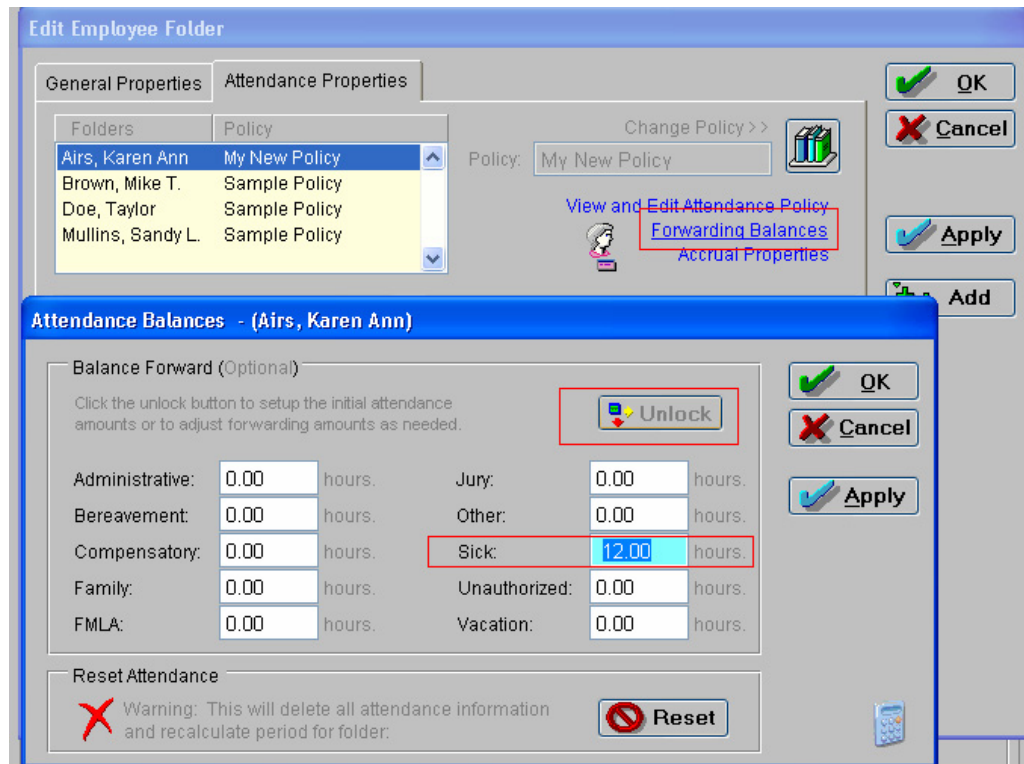
This is where you need to specify the policy if you haven't already. Also note that we changed the Vacation initial date and period date to the same day as the employee hire date.



4.5 Balances Forward



Setting up Attendance for any time prior to the current period should be specified as carryover leave. For example, if an employee had a balance of 12 hours of sick leave before January 1 then enter 12 hours in the forwarding column. Together with the forwarding balance and the current period accrual minus any used sick leave for the current period will equal his current balance.



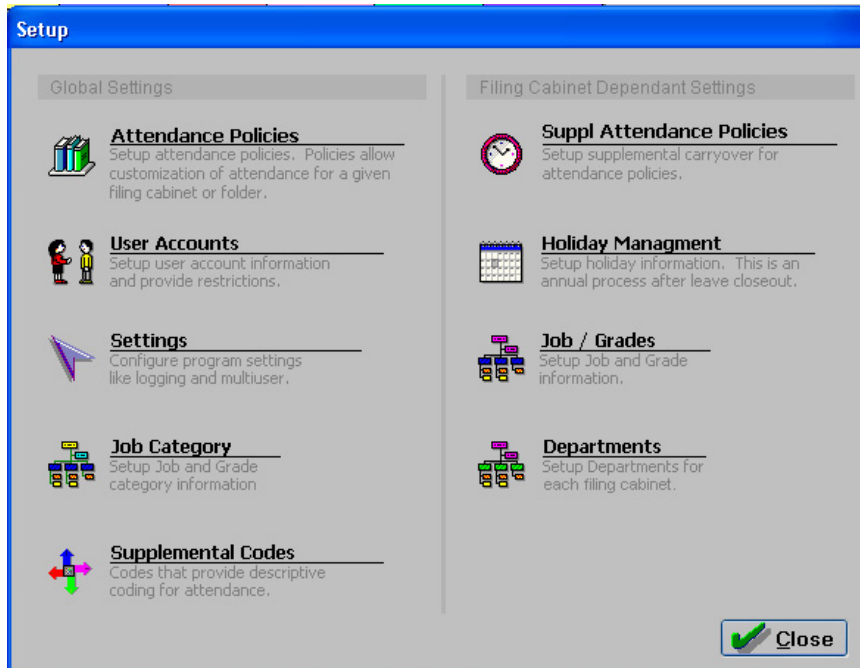
5.0 General Setup

The General Setup includes the following areas:

- Attendance Policies
- Setup User Accounts
- Configure Settings
- Attachments
- Job Category
- Supplemental Attendance Policies
- Holiday Management
- Jobs and Grades
- Departments



as seen below:



5.1 Attendance Policies

See section 4

5.2 Setup User Accounts

User Accounts are optional. Use this in multi-user environments where you have more than one HR 'administrator' using Turbo Attendance and you want to secure access at the Filing Cabinet level.

Use this option to restrict access to a specific database for one or more users.

5.3 Configure Settings

Configuration Settings allows Turbo Attendance to provide for the following multi-user settings, Canadian Extensions, Windows Theme Support and Optimizer support.

5.3.1 Multi-User Access

Improves update frequency between one or more users accessing the same data in heavy multi-user environments. This is a global option.



5.3.2 Canadian Extensions

This transforms the SSN to SIN and other helpful Canadian options. This is a global option.

5.3.3 Windows Theme Support

Windows Theme Support determines the look of the various graphic elements of Turbo Attendance, such as the windows, icons, fonts, colors, and the background. This is a global option.

5.3.4 Optimizer is auto configured. This is a global option.

5.4 Job Category Information

This option provides for setting up Job Category information. This is a global option.

5.5 Supplemental Codes

This option provides for setting up and managing attendance codes. This is a global option.

5.6 Supplemental Attendance Policies

This option provides for manual attendance. This option is at the filing cabinet level.

5.7 Holiday Management

This option provides for setting up holidays within the calendar.

5.8 Job and Grades

This option provides for setting up Job Grades. This option is at the filing cabinet level.

5.9 Setup Departments

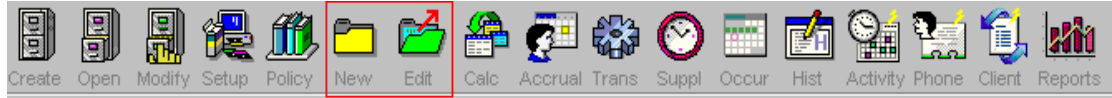
This section allows you to enter departments into Turbo Attendance. You specify your management and directors structure. This option is at the filing cabinet level.

6.0 Creating and Managing Folders

As explains in section 2.2 each employee, non-employee or contractor is represented by a folder. All relative information to this employee is contained



within the folder. See the below toolbar for easy access to create and manage employee folders:



Clicking on the new button above presents the following window:

The window above collects the required information (Last Name, First Name, Hire Date) in order to create a folder. Once you click on the OK button the edit employee folder window is presented. You can then enter additional information.

6.1 General Properties



General properties provide for general employee information such as name, status, department and job title as see above.

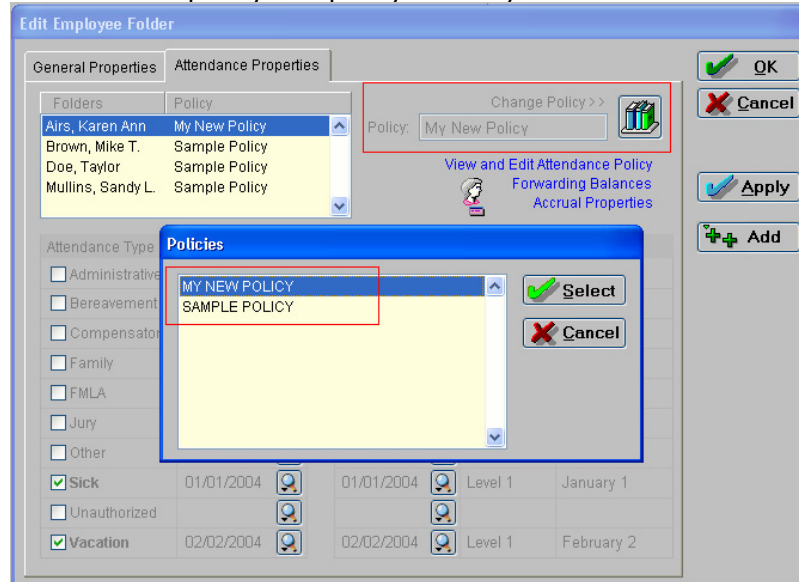
6.2 Attendance Properties

Attendance properties provide for the following:

- Policy used by folder
- Forwarding Balances
- Setup dates for initial accrual configuration
- Setup current period dates

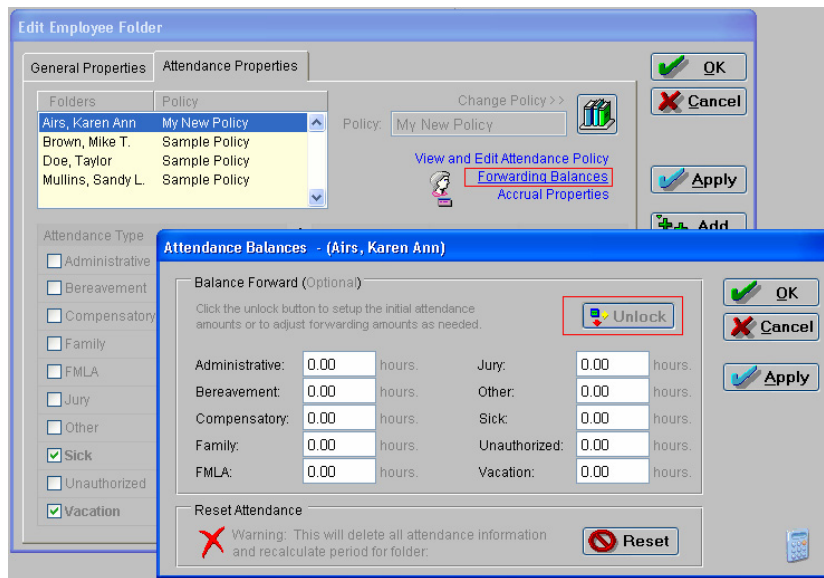
6.2.1 Policy

You can specify the policy used by the folder as shown below:



6.3 Forwarding Balance

You can specify the forwarding balances as shown below:



Simply click on the forwarding balances link and click the unlock button to enter forwarding amounts.

7.0 Using the Desktop

The desktop provides for six different views or functional representations of managing attendance information. You can access each view by a click of the mouse as show below:



7.1 Folder View

The folder view shows general folder information and the optional folder picture as shown below:



Folder Chart Balance Browse Attach Approval

Attendance FOLDER New | Edit

Name: **Airs** **Karen** **Ann**

Hire Date: 02/02/2004

SSN: 667-65-4444

DOB: 02/16/1971

Work Phone:

Cell Phone:


Email:

Department:

Role:

ID:

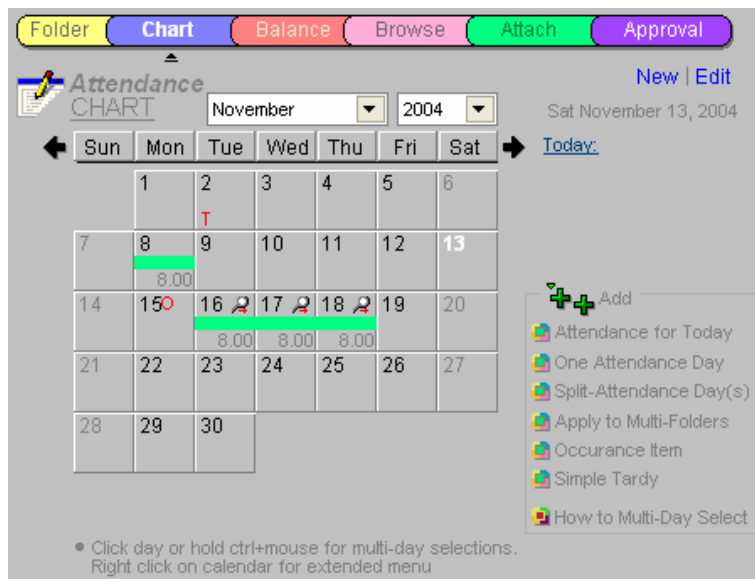
System ID: 7



Picture...

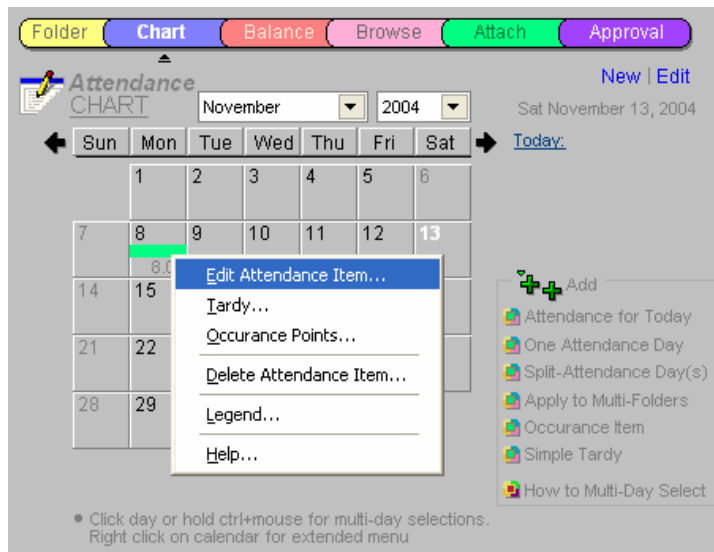
7.2 Chart View

The Chart view shows a month view as shown below:

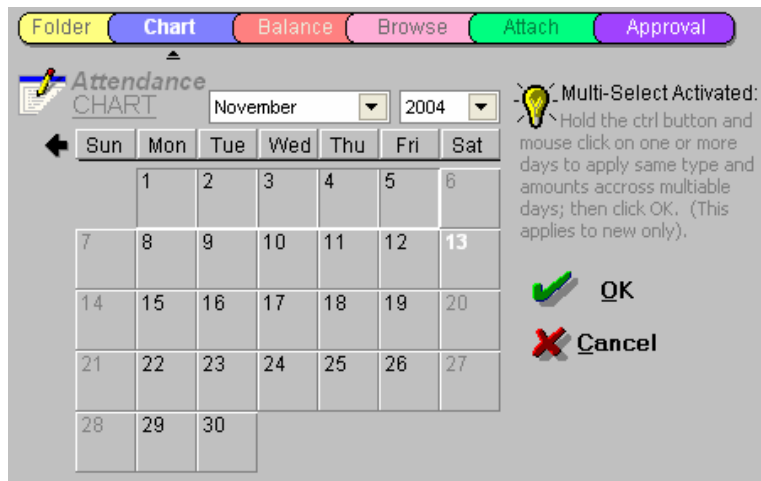


Above shows a tardy item on Nov 2, an Occurrence item on Nov 15 and approve Attendance on Nov 16, 17, 18 that has not been used since today is marked as Nov 13.

Below, you can right click on a day and add or edit an attendance item.



You may also multi-select more than one day at a time of an employee as shown below:



To multi-select, hold the CTRL button on the keyboard and mouse click on one or more days to apply same type and amounts across multi-able days. Then click on the OK button.

7.3 Balance View

The balance view allows you to see each employee folder earned, used and balance in real-time.



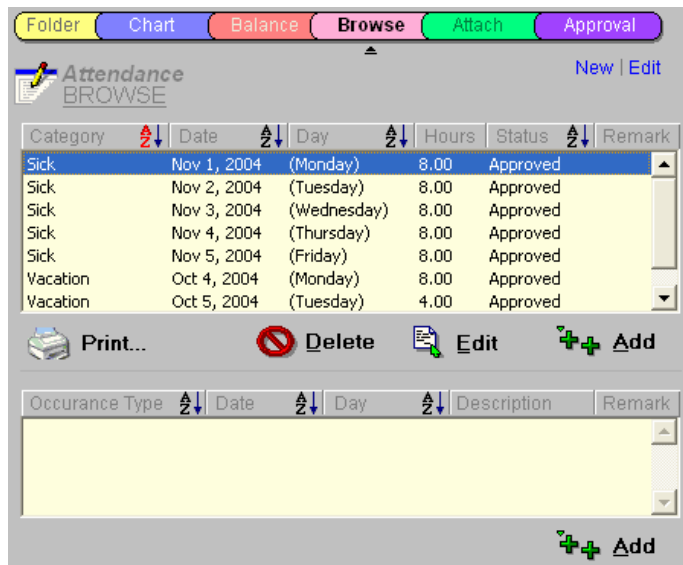
	Forward (+)	Earned (+)	Suppl (+)	Used (-)	Balance (=)	Attendance Type & Period
Administration				8	-8	
Bereavement						
Compensatory						
Family						
FMLA						
Jury						
Other						
Sick		35			35	Auto Jan 1Dec 31
UnAuthorized						
Vacation		31			31	Auto Feb 2Feb 1

You can also click on an item in question to drill into the details. In this example we clicked on the 12 hours of Vacation time as see below:

Category	Date	Day	Hours	Status	Code	Remark
Vacation	Oct 4, 2004	(Monday)	8.00	Approved		
Vacation	Oct 5, 2004	(Tuesday)	4.00	Approved		

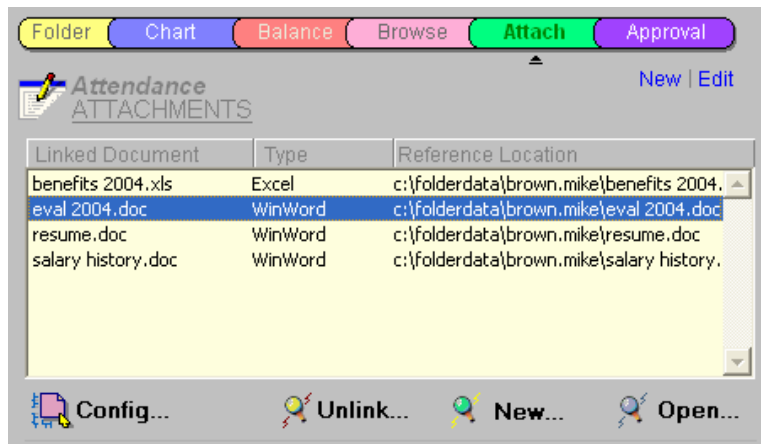
7.4 Browse View

The browse view shows all used transactions. From this point you can add, edit and delete transactions.



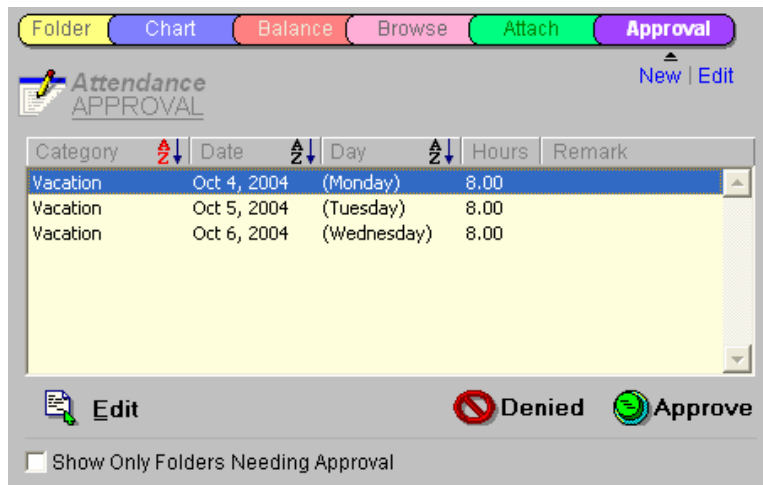
7.5 Attach View

The Attach view allows you to attach Word, Excel and other documents to an employee folder as shown below:



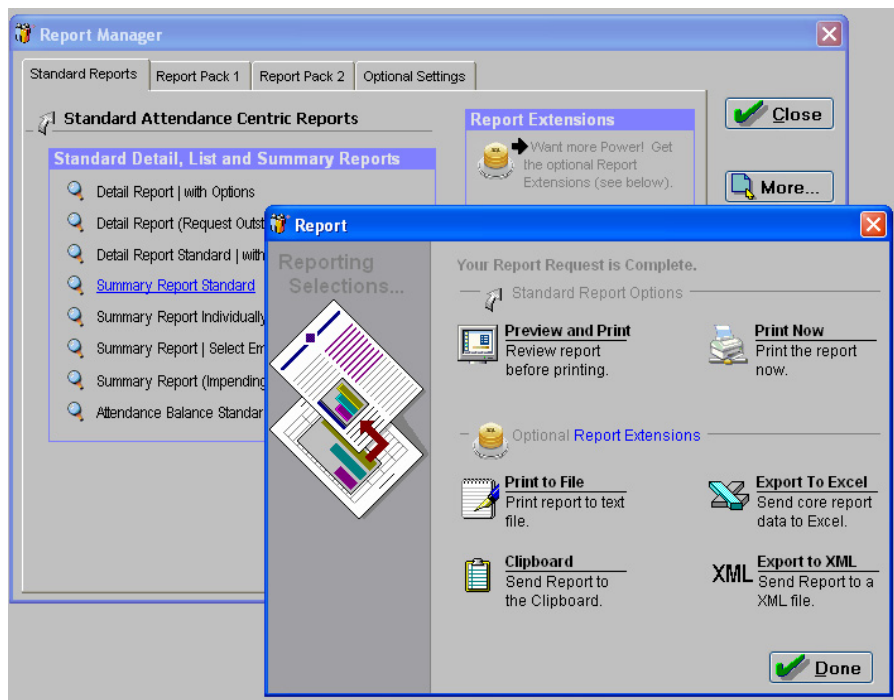
7.6 Approval View

The approval view allows you to see easily any requested attendance for the selected employee folder. You can click the "Show Only Folders Needing Approval" to find out what folders need approvals.



8.0 Reporting

Shipped with Turbo Attendance are standard reports. You can also purchase report packs and optional Report Extensions as see below:



9.0 Capacities

Object

Limits



Folders	Your allowable folders depend on the registered licensed. (Note: Licenses includes all folder active and inactive)
Maximum Folders	99,999
Filing Cabinets	No Limit
Attachments	50,000 per folder
Attendance Items	1 Million per year
Network Connects	Dependant on OS limit

10.0 Further Reading

For the latest Technical Installation Instructions follow these links:

Installing and Troubleshooting Turbo Attendance Multi-User Environment
Installing and Troubleshooting Portal

www.PersonaWare.com/help.htm

Please visit our web site www.PersonaWare.com for the latest version of this document and other documentation.