



Welcome to the TimePro Compact Time Control System

Please take the time to read and follow these instructions to ensure that you get the system up and running as quickly as possible.

System Contents

The TimePro Compact system consists of the following components:

1. TimePro Compact Data Terminal
2. Data Terminal Power supply unit
3. Data Terminal wall mounting bracket and fixing screws
4. Data Transfer and charging Cradle
5. Data Cradle Power supply unit
6. Data Cradle to PC communication cable
7. TimePro Compact software

If any of the above are missing, please contact Motor Industry Management Systems Ltd on 01246 267715

Installing the TimePro Compact software

Insert the TimePro Compact CD into the computer; the CD Menu should start automatically, if it does not:

1. Click the Windows Start button and Click 'Run'
2. Type D:\Autorun.exe (where D represents your CD Drive letter)
3. Click 'OK'

From the CD Menu choose 'Install TimePro Compact Software' and follow the on screen prompts until setup is complete, restart the computer if required.

We would also suggest that you install Acrobat Reader® if you do not already have this software. This can be installed from the CD Menu 'Install Acrobat Reader Software', this software will enable you to view / print the full TimePro Compact instructions and other documents which can be viewed / printed by clicking 'View / Print Documents on the CD Menu.

We would recommend that you print, or have available to view, the following documents that can be found on the CD:

1. **TimePro Compact Instructions (TimePro Compact.pdf)**
2. **TimePro Compact Terminal Instructions (TimePro Compact Terminal.pdf)**
3. **Daily Routine Flowchart (Daily Routine Flowchart Compact.pdf)**

Installing the Portable Data Cradle

The TimePro Portable Cradle is used to transfer data from the Portable to the TimePro software. It can also be used to charge the battery in the Portable.

The data cable should be connected to the socket on the **REAR** of the data cradle and a 9 Pin Com port on the computer; if you do not have a spare Com port you have two options:

1. Use a switch box to switch between another peripheral (such as a modem) that is using a Com port and the portable cradle.
2. Use a USB to Serial adapter (Not suitable for Windows NT4)

Both of the above are available from Motor Industry Management Systems Ltd.

Plug in the mains adapter and connect it to the rear of the cradle, make sure the slide switch on the rear of the cradle is set to 'ON'

Setup the TimePro software for Employees, Sale Codes and Non Productive Codes

Before you can use the Clocking Terminal, it must be programmed with the details of your employees, your Sale Codes (Retail, Warranty etc) and your Non Productive Codes (Idle Time, Driving, for example).

Start the TimePro Compact programme by double clicking the icon on the desktop. Do not worry too much about the various functions of the programme at this point as these can be looked at in detail later, at this stage we just need to set up certain criteria.

Employees

Click the 'Employees' button  on the top toolbar (Tip: Holding the cursor over a toolbar button will display a Tool Tip)

Three employees have been partially setup for you, these need to be modified as follows:

1. Overtyping the first employee (Employee 1) with the name of your first employee. Use both a first and last name (Joe Bloggs) or initial and last name (J Bloggs).
2. Either use the tab key or click in 'Clock Name' box. This will then change to match the name field unless it is greater than 18 characters in which case it will be abbreviated.
3. If the employee is productive (i.e. he clocks on and off jobs) change the 'Default Job' to Idle (AutoClock).
4. Click the 'Next' button  on the lower toolbar and repeat the above with employee 2 & 3.
5. If you have more than three employees, use the 'New' button to create a new employee using the next available number. If you have less than three employees, use the 'Delete' button on the lower toolbar to remove the unused ones. The standard licence allows a maximum of 10 employees of which 4 can be productive.
6. Close the Employee screen

(For full details of Employee Settings, see 'Employees' in the TimePro Compact instructions)

Sale Codes

These allow you analyse jobs by the type of work, typically Retail, Warranty and Internal (these are the defaults) if you wish to change these descriptions, click the 'Job Costing Setup' button  on the top toolbar. You can change the descriptions by overtyping them. **DO NOT ALTER OR DELETE CODE 5 – Non Productive.**

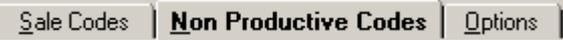
The standard licence will allow an additional code, to create a new code, click the 'New' button on the lower toolbar and complete as required. You can use any number between 10 and 60 that is not already in use.

Note: You can ignore the 'Alias' Column

(For full details of these Settings, see 'Job Costing Setup' in the TimePro Compact instructions)

Non Productive Codes

These are codes that are used when a productive employee does not have a job to clock onto such as Idle Time, Driving, and Policy etc. You can use the standard codes or change the description if required. Open the 'Job Costing Setup' screen  and click the 'Non Productive Codes' tab.

 You alter the existing codes by overtyping them. *The codes 2039, Pending and 2041 Idle (AutoClock) are reserved codes and should not be altered. We would suggest that code 2044 is left as 'Idle Time' or 'Waiting' i.e. the productive does not have a job to clock onto but is not doing any other activity that prevents him from working (Driving a vehicle for example)*

(For full details of these Settings, see 'Job Costing Setup' in the TimePro Compact instructions)

Programme the TimePro Portable Clock with your information

Now that we have set up the software, we need to prepare and programme the Clock Terminal with this information.

1. Click the 'Clock Operations' button  on the top toolbar, this will open a small screen with a toolbar.
2. Click 'Create User, Sale and Non Prod List' on this toolbar. 
3. This will display a dialog screen where you can customise the information to be created, do not alter the default settings and click 'Create List' on the lower toolbar. 
4. Close the Create List Screen.
5. Ensure the Data Terminal cradle is installed and switched on.
6. Switch the TimePro Portable Terminal on by pressing the red power button on the lower left of the unit.
7. Press & hold the number 3 button for a second or two, the unit will beep rapidly and the display will now change to show the unit model number and memory details.
8. Press the 'Menu' button on the terminal, the display will now read 'MAIN MENU'
9. Place the terminal in the data cradle.
10. Click the 'Clock Setup' button  on the toolbar of the Clock Operation screen.
11. On the Setup screen, set the Com Port number to the Com Port you have used on your computer, close the Setup screen.
12. On the Clock Operations toolbar, click the 'Run Clock Operation' button. 
13. On the dialog screen that is displayed, check the box 'Programme TimePro Portable with User Names, Sale and Non Prod Codes'
14. Click 'OK', the software will now programme the terminal with the information. If you receive a 'Time Out' message, ensure that the data cradle is switched on, the terminal display reads 'Main Menu' and that the software is set to use the correct Com Port.

Install the TimePro Portable Clock wall bracket and begin clocking

The terminal wall bracket should be fitted to a suitable place where the staff can use the Terminal for clocking in and out of work and onto jobs. The unit should be at a convenient height for the display to be read. If possible, install near a 13 amp power supply so that the mains adapter can be plugged into the unit. If this is not possible, the terminal will run on the batteries but you will have to transfer it to the cradle to charge up overnight.

Using the Clock Terminal

Note: Before using the Terminal, you may find it helpful to print out a list of the Sale and Non

Productive codes. Click the 'View / Print Reports' button  on the top toolbar, click on the list of available reports and choose the last report in the list 'Sale and Non Productive Code List', Click the 'Print' button on the lower toolbar. Also see the document 'TimePro Compact Terminal Instructions' for full instructions on using the TimePro Compact Terminal.

Switch on the Terminal, the display will look like this:

```
TimePro Portable V4
1  Select Employee
2  Review Data
```

To Clock IN:

1. Press button 1, the terminal will beep and ask for a User Clock ID. This is the employee numbers as set up in the software. Type in a number and press the red 'Enter' key. If you have used a valid number, the employees name will be shown, if it is incorrect press 'Exit' to

start again otherwise press 'Enter'. The employee will now be clocked 'IN' for work (The display will say Hello with the date and time momentarily)

2. The Terminal will now give the prompt 'Clock on Job?' If this is a Non productive employee, press 'Exit' , otherwise press 'Enter'
3. You will now be prompted to enter a Job Number or Non Productive code.

Either

- a. Type in a Job Number and press 'Enter'
- b. Confirm the number by pressing 'Enter' again
- c. You will now be prompted for a Sale Code, this is the code for the type of work such as Retail, type in the code (10 for example) and press 'Enter', the description will be displayed. If it is correct press 'Enter' or 'Exit' to re-enter.

OR

- d. Type in the appropriate code for the Non Productive activity (2044 for example) if the code is correct, the description will be displayed. Press 'Enter' to accept or 'Exit' to re-enter.

From this point on an employee will need to change jobs throughout the day, to do this it is only necessary to clock onto the new job (or non productive activity if no job is available) you DO NOT have to clock off a job, this is done automatically by clocking onto the new job.

To change jobs:

1. Press button 1
2. Type in the Employee Clock ID and press 'Enter'

The screen will now show:

```
Employee number nnn
1  Clock Out
2  Job / Non Prod
```

3. Press button 2
4. Repeat the procedure shown above to clock onto a job or non productive activity.

At the end of the shift, to clock OUT:

1. Press button 1
2. Type in the Employee Clock ID and press 'Enter'
3. Press button 1

All employees should clock IN as described above, use the terminal for at least one complete shift or working day before you try to download the data to the software.

Setup the TimePro software with your working parameters (Start & finish times etc)

Before you download the data form the Clock Terminal, you may wish to refine some of the settings in the software. Please refer to the TimePro Compact Instruction manual for full details of the following:

1. **Overtime Rates.**  You can have up to 5 overtime rates including basic. The defaults are: Rate 1 = Basic, Rate 2 = Time and Third, Rate 3 = Time and Half, Rate 4 = Double Time, Rate 5 = Not Used. (See 'Companies / Groups / Rates of Pay' in the TimePro Compact Instructions) **Note: If you make any changes to the overtime rates, close and restart TimePro Compact before downloading any data.**

2. **Shift Setup.**  The default shift that employees are allocated to by default is fairly typical being an 8 hour day starting at 8.00 am and finishing at 05.00 pm with 3 minutes grace and 15 minutes rounding. You can alter the settings to suit your company circumstances. If you have employees who work different hours etc you can create separate Day Rules / Shifts / Shift Groups to cater for almost any working pattern. (See 'Day Rules, Shifts, Overtime & Shift Groups' in the TimePro Compact Instructions)

3. **Overtime.**  By default, overtime is paid on a daily basis, i.e. if on an 8 hour day, an employee works 9 hours he will get 1 hours overtime irrespective of the total hours worked for the week. These parameters are dealt with by the 'DAY RULES' If you wish to pay overtime on a target achieved basis, i.e. overtime only starts once a target figure has been hit (say 40 hours) you can set up an 'OVERTIME RULE' (See 'Day Rules, Shifts, Overtime & Shift Groups' in the TimePro Compact Instructions)

Note:

- On the DAY RULES there is an option to automatically deduct a break, for example lunch; this should only be used where the Day Rule applies to Non Productive Employees. Productive employees must always clock an unpaid break.
 - You allocate the appropriate SHIFT GROUP & OVERTIME rule to each employee in the 'Employee Screen' (See *Employees' in the TimePro Compact Instructions*)
4. **Job Costing options.**  You may wish to change the Value for the Sale Codes (the default is £30) this is the average charge out rate for the code. Also set any options via the 'Options' tab on the 'Job Costing Screen' (See 'Job Costing Setup' in the TimePro Compact Instructions)

 5. **Print a list of Codes** (If not already done) Click the 'View / Print Reports' button  on the top toolbar, click on the list of available reports and choose the last report in the list 'Sale and Non Productive Code List', Click the 'Print' button on the lower toolbar.

 6. **if you have created new shifts or your employees use a Weekly Overtime Rule**, open the Employees screen and assign the appropriate Shift Group and Overtime Rule to each employee. You should also assign each employee to an employee group, enter the employees basic hourly rate of pay and their annual holiday entitlement. (Click on the 'Confidential' tab to enter pay rates and holiday entitlement)

Download the Data

Once you have used the terminal for at least one shift or working day you will ready to download the data to the software. The steps shown are as detailed on the [Daily Routine Flowchart](#)

1. Put the Data Terminal into 'Data' mode by pressing and holding button 3 for a couple of seconds, then press the 'Menu' key. The display should read < MAIN MENU >. Place the terminal in the cradle.
2. In the TimePro Compact software, open the 'Clock Operations' screen and click the 'Run Clock Operation' button.
3. Click 'OK' on the dialog screen that is displayed.

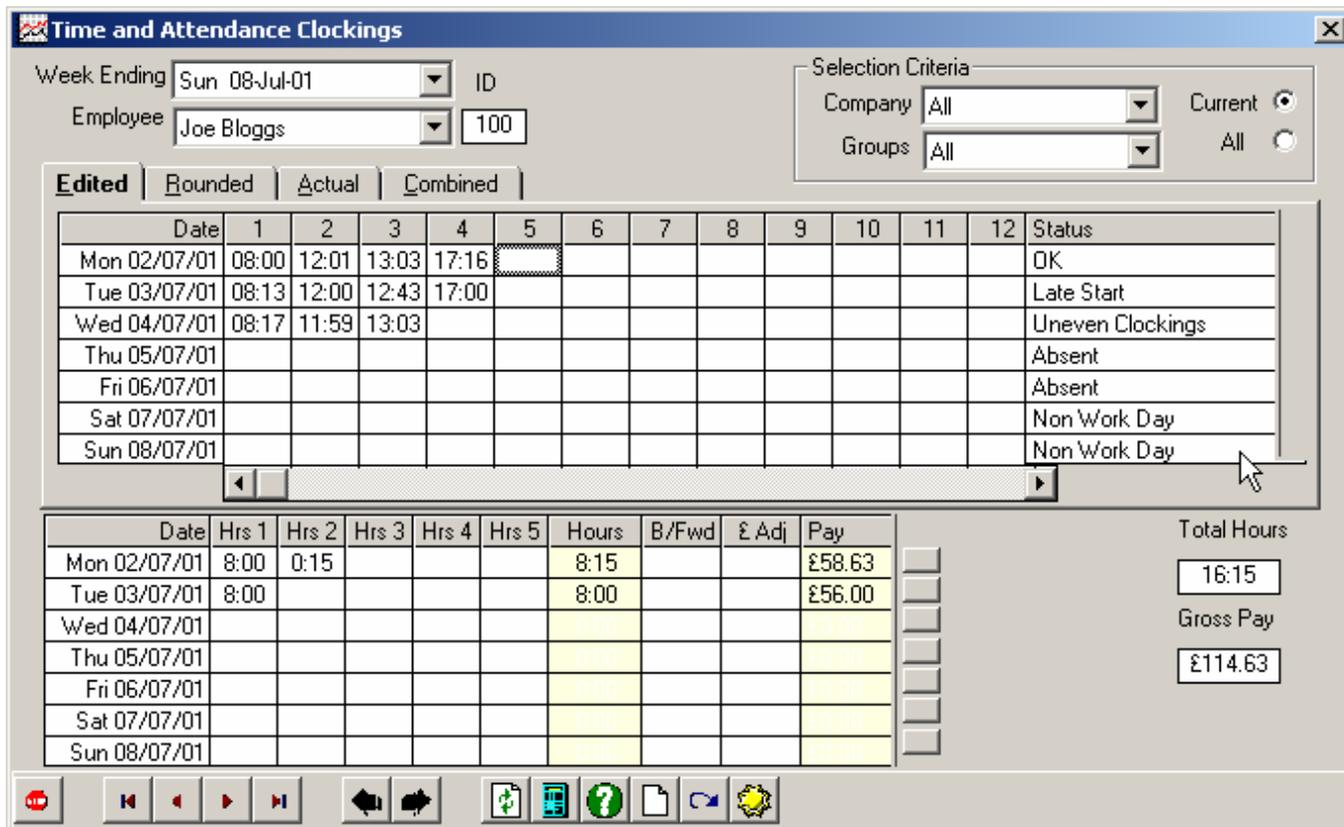
The programme will process the data that has been downloaded from the terminal. You can then return the terminal to its workstation.

Close the Clock Operations Toolbar.

You now need to do the following:

1. Review the Attendance Clockings for any errors. (See 'Checking / Editing the Time and Attendance Data' in TimePro Compact Instructions)

- Open the Time & Attendance Screen 
- Click the 'Refresh' button  on the lower toolbar or choose the desired week from the Drop down box labelled 'Week Ending' the screen will look something like this:



Date	1	2	3	4	5	6	7	8	9	10	11	12	Status
Mon 02/07/01	08:00	12:01	13:03	17:16									OK
Tue 03/07/01	08:13	12:00	12:43	17:00									Late Start
Wed 04/07/01	08:17	11:59	13:03										Uneven Clockings
Thu 05/07/01													Absent
Fri 06/07/01													Absent
Sat 07/07/01													Non Work Day
Sun 08/07/01													Non Work Day

Date	Hrs 1	Hrs 2	Hrs 3	Hrs 4	Hrs 5	Hours	B/Fwd	£ Adj	Pay	Total Hours
Mon 02/07/01	8:00	0:15				8:15			£58.63	16:15
Tue 03/07/01	8:00					8:00			£56.00	
Wed 04/07/01										Gross Pay
Thu 05/07/01										£114.63
Fri 06/07/01										
Sat 07/07/01										
Sun 08/07/01										

The first employee will be shown with his Attendance clockings, the clockings go from left to right for each day, where TimePro Compact is happy with the clockings, the hours TimePro be paid at Rate 1, 2 etc are shown for the day in the lower half of the screen. (All clockings and times are in hours and minutes on this screen)

If you carry out this routine daily, you will only need to check the clockings for the previous working day. You are looking for a message in the Status column that says 'Absent' or 'Uneven Clockings' (**Always ignore the current day as there will quite possibly be uneven clockings**) if the message is 'Uneven Clockings' then you will have to determine what is wrong, either a clocking is missing (the employee forgot to clock out for example) or there may be an extra clocking for some reason.

To **delete** a clocking, click on the clocking in question, press the 'Delete' button on the keyboard, then press the 'Enter' key.

To **add a new** clocking, click in any blank box for the day in question and type in the new time in 24 hour format, press the 'Enter' key. (Note: new clockings can be entered in any order, you do not have to move or edit the existing clockings)

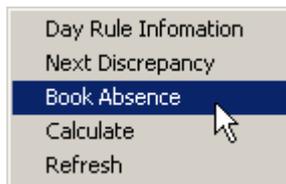
To **amend** an existing clocking, simply overtype it, press 'Enter' to confirm.

You will notice that no changes will appear to have taken place but if you look in the Status Bar at the bottom of the TimePro Compact screen you will see the message 'Calculate Required' TimePro Compact will show this message whenever it needs to calculate to reflect any changes that you have made. You can calculate after making each change or do all your amendments in one go and calculate at the end. To tell TimePro Compact to calculate, click the 'Calculate'

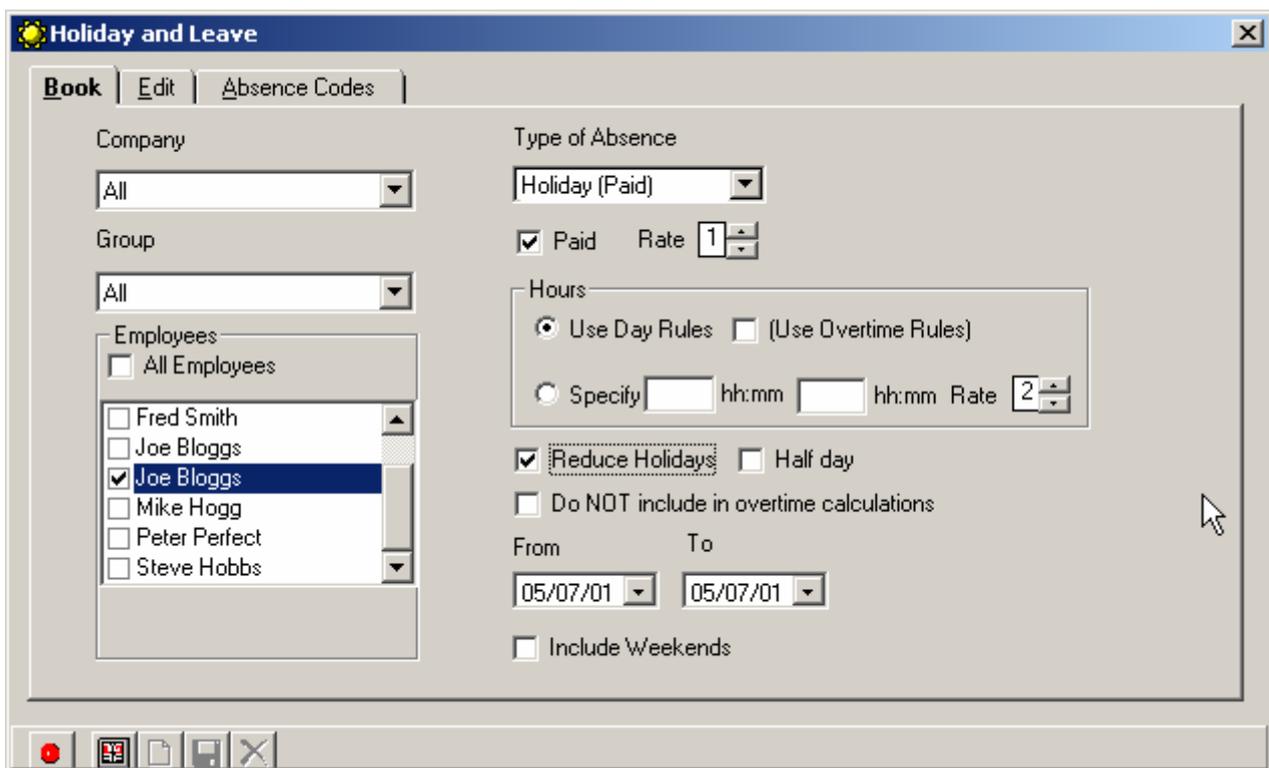
button  on the lower or upper toolbar. After TimePro Compact has calculated the clockings will be in the correct order and the time to be paid will have been calculated.

2. Book any absence for employees, such as Holidays or Training.

If the status is 'Absent' then the employee did not make any clockings for that day. You can leave it as absent if he is not to be paid, but more likely you will want to record the reason for his absence and pay him if appropriate. To book an absence, click on the status box that says 'Absent'  for the day and employee that you are dealing with and either: right click the mouse and choose 'Book Absence' from the Pop up menu:-



Or click the 'Book Absence' button on the **lower** toolbar.  This will show the Holidays and Leave screen, by accessing this screen in the way described, it will default to the employee that you are dealing with and also the date.



From the 'Type of Absence' drop down choose the reason for the absence and select any other options as required (see 'Booking Holidays and Absence' in the TimePro Compact Instructions for full details of options etc)

To confirm the absence, click the 'Book' button  on the lower toolbar of the Holiday and Leave screen.

Close the screen to return to the Time and Attendance screen. The screen will now be update with reason for the employee's absence and the amount of time he is to be paid for that absence.

You need to check the attendances / absences as described above for all employees. To

move to the next employee, click the 'Next' button  on the lower toolbar of the Time and Attendance screen.

3. Print any clocking labels that are required.

If individual clocking labels are required (these are self adhesive labels showing the individual clockings that may be required for Job Cards etc) they can be printed from the TimePro Compact software.

- a. Click the 'Print Portable Clocking Labels' button  on the top toolbar.
- b. This will show a dialog screen from which you can choose various options for the labels (Employees, Job numbers, Dates etc)
- c. You will require Avery® L7160 or equivalent labels, if you are using a part used sheet of labels, select the column and row that you wish to start printing at.
- d. The labels are then printed by clicking the 'Print' button or they can be previewed on screen first.

Note: You have an option to print labels for the current day (Today's Jobs). This will obviously only be as up to date as the last download from the Portable Terminal and may not take into account any roundings etc as the data may not have been fully processed if the work shift has not ended.

4. Enter the Sold / Allowed Hours for each productive.

TimePro Compact obviously records the time clocked on all jobs. To provide a measure of efficiency and productivity you need to tell TimePro Compact the hours sold. This is simply done by recording the hours invoiced for each productive employee on a daily basis. You will find a suitable form for this in the Documents folder on the CD (Hours Input Sheet.pdf)

As jobs are invoiced, record the time sold against the employee who worked on the job. (The time should be recorded in decimal format i.e. one hour and thirty minutes is entered as 1.5) At the end of the day add up each employees jobs to get a total hours sold for each employee. Note that the date refers to the date that a job is invoiced, not the date on which the job was worked.

This information is then easily entered into TimePro Compact; click the 'Input Sold / Allowed hours' button  on the top toolbar. This will show an input screen.

	Date	Num	Name	Hours
	19/07/02	100	Sid Jones	0.00
	19/07/02	101	Fred Smith	0.00
	19/07/02	103	Andrew Nolan	0.00
	19/07/02	104	Peter Perfect	0.00
	20/07/02	100	Sid Jones	0.00
	20/07/02	101	Fred Smith	0.00
	20/07/02	103	Andrew Nolan	0.00
	20/07/02	104	Peter Perfect	0.00
▶	21/07/02	100	Sid Jones	0.00
	21/07/02	101	Fred Smith	0.00
	21/07/02	103	Andrew Nolan	0.00
	21/07/02	104	Peter Perfect	0.00

Date Options
 Last 30 Days
 All Dates
 Order by Employee / Date

The total hours invoiced for each employee can easily be entered; pressing the 'Enter' key after entering the time will move you down to the next employee. (Note: the data should be in decimal format i.e. one hour and thirty minutes is entered as 1.5)

5. Print any reports

Reports are accessed by clicking the 'View / Print Reports' button  on the top toolbar.

TimePro Compact comes with a comprehensive suit of reports; these are selected from the Drop down box labelled 'Available Reports'

There are various ways to 'filter' the contents of the reports, for example by Date range, Employees, Job numbers etc. if a filter is available to the report you have chosen it will be 'enabled' on the reports screen.

To view / print a report:

- a. Select the desired report from the list.
- b. Apply any filters (most usually the date range)
- c. Print the report by clicking the 'Print' button on the lower toolbar or (recommended) preview the report on screen first by clicking the 'Preview' button, you can print from the preview screen by clicking the printer button at the top of the preview window.

Some of the most popular reports are:

- a. **Paid Hours Summary**
Two versions of this report are available (Including or Excluding Paid absence). These reports show the total amount of hours to be paid by pay rate for each employee.
- b. **Absence by Date, Absence by Employee and Holiday Status**
The absence reports summarise absence by Date or Employee, the Holiday Status Report shows how many days holiday an employee has taken and the number of day's holiday that

he has left. For this report, you should select 'Custom Dates' and use your holiday year as the From and To dates. (See 'Employees' in the TimePro Compact Instructions)

c. Performance Summary and Performance Summary 2

These are the key management reports. They show the total attended, available, productive and sold times for each employee. The Non Productive activities are split into two categories, Allowed and Disallowed.

An Allowed Non Productive activity would be an activity where the employee is not working on jobs and is not available to do so, for example driving or on site training.

A Disallowed activity means the employee is available for work, usually Idle Time.

Attended Hours = Paid Hours less Absence

Available Hours = Attended less Allowed Non Productive

Productive Hours = Available less Disallowed Non Productive

The three key ratios are calculated as follows:

Utilisation

$\text{Productive} / \text{Available} \times 100$

Productivity

$\text{Sold} / \text{Available} \times 100$

Efficiency

$\text{Sold} / \text{Productive} \times 100$

Performance Summary 2 presents the same information and in addition has graphs showing individual performance and Non Productive times.

d. Employee Activity Report

This report shows an employees activity through the day.

e. Detailed Job Report

Shows who has worked on a, Job clocking by clocking. To view details for a specific job, choose 'All' dates, click on 'Job Costing Options' and enter the Job Number.

f. Non Productive Reports

These reports show non productive activity by date or employee, in detail or summarised.

Getting Help

In the first instance, check the Instructions and / or Help screens.

If the problem relates to communication with the Data Terminal, ensure all connections are secure, the Unit is 'Data Mode' and the TimePro Compact software is correctly set with the Com port that the Data Cradle is connected too.

Check the TimePro website www.timepro.co.uk for any updates

If you are unable to resolve the problem, please telephone Motor Industry Management Systems Ltd on 01246 267715 Or email your request to:
CompactSupport@mims.demon.co.uk