

**Oracle® Retail Workforce Management**  
User Guide  
Release 1.62

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Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

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# Preface

## Documentation Accessibility

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### Access to Oracle Support

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## Related Documents

For more information, see the following documents in the Oracle Retail Workforce Management Release 1.62 documentation set:

- Oracle Retail Workforce Management Installation Guide
- Oracle Retail Workforce Management System Architecture

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- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

## Review Patch Documentation

When you install the application for the first time, you install either a base release (for example, 13.3) or a later patch release (for example, 13.3.1). If you are installing the base release or additional patch releases, read the documentation for all releases that have occurred since the base release before you begin installation. Documentation for patch releases can contain critical information related to the base release, as well as information about code changes since the base release.

## Improved Process for Oracle Retail Documentation Corrections

To more quickly address critical corrections to Oracle Retail documentation content, Oracle Retail documentation may be republished whenever a critical correction is needed. For critical corrections, the republication of an Oracle Retail document may at times **not** be attached to a numbered software release; instead, the Oracle Retail document will simply be replaced on the Oracle Technology Network Web site, or, in the

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case of Data Models, to the applicable My Oracle Support Documentation container where they reside.

This process will prevent delays in making critical corrections available to customers. For the customer, it means that before you begin installation, you must verify that you have the most recent version of the Oracle Retail documentation set. Oracle Retail documentation is available on the Oracle Technology Network at the following URL:

<http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html>

An updated version of the applicable Oracle Retail document is indicated by Oracle part number, as well as print date (month and year). An updated version uses the same part number, with a higher-numbered suffix. For example, part number E123456-02 is an updated version of a document with part number E123456-01.

If a more recent version of a document is available, that version supersedes all previous versions.

## Oracle Retail Documentation on the Oracle Technology Network

Oracle Retail product documentation is available on the following web site:

<http://www.oracle.com/technetwork/documentation/oracle-retail-100266.html>

(Data Model documents are not available through Oracle Technology Network. You can obtain them through My Oracle Support.)

## Conventions

**Navigate:** This is a navigate statement. It tells you how to get to the start of the procedure and ends with a screen shot of the starting point and the statement “the Window Name window opens.”

This is a code sample

It is used to display examples of code

---

# Introduction

---

**Note:** The rebranding for the latest version of this documentation set is in development as part of post MICROS acquisition activities. References to former MICROS product names and companies that MICROS acquired may exist throughout this existing documentation set.

---

## Login

To open the software, you first need to Login to the system.

1. Click on your shortcut to the software and a screen, similar to the one below, will be displayed.

The screenshot shows the Torexretail ePERFORMANCE login interface. At the top, a dark blue header bar contains the 'Torexretail' logo on the left, the text 'Awaiting login 12 February 2007' in the center, and a 'LOGON' button on the right. The main content area has a light blue background with a faint globe graphic and the text 'ePERFORMANCE!'. In the center, a box titled 'Welcome to ePERFORMANCE' contains the instruction 'Enter your login details below to continue'. Below this is a 'Login' window with two input fields labeled 'Name' and 'Password', and a 'LOGIN' button. The bottom right corner of the screen displays 'Version 1.16.6.11' and the 'Torexretail' logo.

### Login window

2. Enter your Username into the **Name** field.
3. Enter your Password into the **Password** field.
4. When ready, click **LOGIN**.

---

**Note:** If you do not know or have forgotten your Username or Password, contact your System Administrator for assistance. Passwords may be case sensitive.

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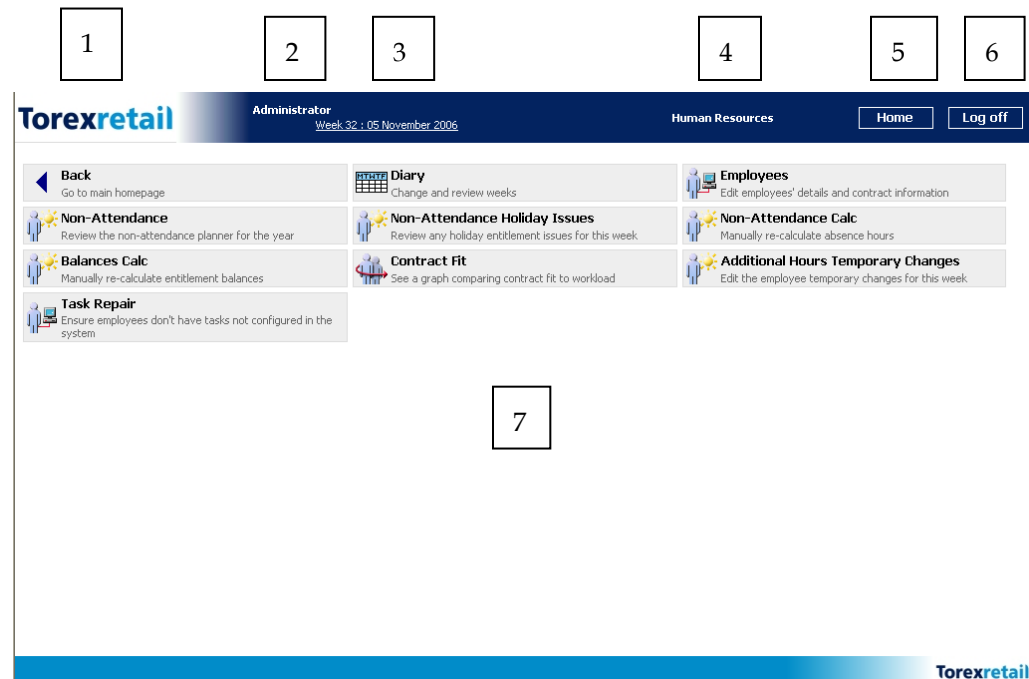
## Log Off

To exit the software, click **Log off**, in the top right hand corner of the screen. You will be returned to the Log In screen.

**Note:** You will lose any unsaved work when you click Log off.

## The Main Screen

The software is made up of seven main components. The majority of these are displayed at all times, no matter which information you are reviewing.



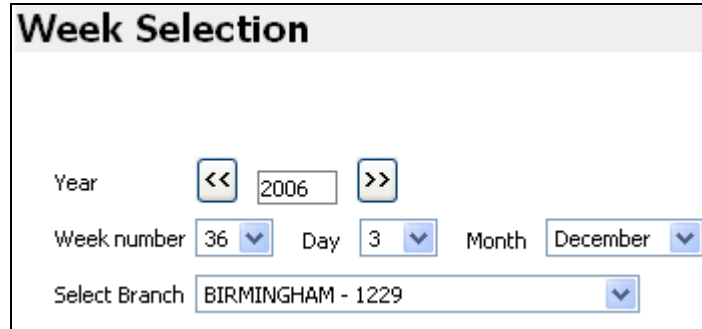
### Administrator window

1. Your company logo will be displayed here.
2. The User Name of the person logged in will be displayed here.
3. This shows the current week number and the date the week began. For more information see the **Week Selector** heading below.
4. The name of the screen being displayed.
5. Clicking **Home** will return you to the most recently-displayed main menu.
6. Clicking **Log off** will shut down the software.
7. This is the main screen, where all of the menus and information is displayed.

---

## Week Selector

Selecting a Week number and date at the top of the screen will display a screen, similar to that that below. It allows you to change the date, so that you can view historical information or plan for the future.



The screenshot shows a window titled "Week Selection". Inside the window, there are four rows of controls. The first row is labeled "Year" and contains two arrow buttons (left and right) flanking a text box displaying "2006". The second row is labeled "Week number", "Day", and "Month", each followed by a drop-down menu. The "Week number" menu shows "36", the "Day" menu shows "3", and the "Month" menu shows "December". The third row is labeled "Select Branch" and contains a drop-down menu showing "BIRMINGHAM - 1229".

### Week Selection window

1. To adjust the year, click on either the left arrow to select a previous year or the right arrow to select a future year.
2. To change the **Week number**, **Day** or **Month**, click drop down menu and select the appropriate option.
3. Depending on your access level, you may be able to choose a branch to work with from the drop-down menu displayed; typically regional/divisional managers and administrators are able to carry out this function.
4. Once all of the information is selected, click **OK** to proceed or the **Cancel** to ignore the changes and to return to the previous screen.





## Diary

The Diary screen is the place most users will navigate around the system from. It displays hyperlinks, ordered by day, which link to the various modules and screens needed for everyday use of ePERFORMANCE! For users that do not have it as their main screen (for example, administrators), the diary can be accessed from most of the menu screens. It can be customized to your company's needs and can assist you, by showing you the processes and reports, which need to be run on a given day.

1. To access the Diary window, click **Diary**.



### Diary button

The Diary window opens.

**Torexretail** Administrator Week 32 : 05 November 2006 Diary Home Log off

Select Fileset: DUBLIN LIFFEY VALLEY - 1705

Previous Week This Week Next Week

**Sunday 05/11/2006**

- Review KPIs for last week
- Generate Forecast for week 36

**Monday 06/11/2006**

- Commit Payroll for last week
- Update Employee Details for week 36
- Update Exceptions for week 36

**Tuesday 07/11/2006**

**NOTE:** Rosters/Schedules will be run on **Tuesday night at 6pm for week 36**, please complete your entries by then.

**Wednesday 08/11/2006**

- Review Roster Report for week 36
- Review Workload Fit for week 36

**Thursday 09/11/2006**

- Edit Schedule for week 36

**Friday 10/11/2006**

- Print & Issue Roster for week 36

**Saturday 11/11/2006**

**Adhoc Activities**

- Real-time Schedule View
- Manually Edit Actual Times
- Print Recruitment Suggestions for week 40
- Request a Roster/Schedule Re-run for week 36
- View Roster/Schedule Re-run Status

**Reports** ---no action---

**Torexretail**

### Diary window

2. Depending on your access rights to the system, you will see the **Select Fileset** option in the top left hand corner of the screen. Here you are able to select an alternate site, if applicable.
3. Beneath that, you have the option to select the **Previous Week**, **This Week**, or **Next Week**. Clicking these buttons will cycle through the relevant weeks and allow you to view the Diary for the period. Clicking **This Week** will always return the screen to the current weeks view.

- 
4. The screen above may not exactly resemble yours, but the theory is the same. Clicking on one of the options will load/run it. For example, Today is Friday. Looking at the Diary above, I need to Print and Issue the Roster for Week 36 today. The system is set to remind me to do this every Friday. I would click on this option and the Roster will be displayed, giving me the option to print it.
  5. In the bottom right hand corner of the screen are **Adhoc Activities**. These are shortcuts to frequently run parts of the system, which do not occur on a given day. There are also a series of **Reports**, which can be selected from the drop down menu.

-  **KPIs**  
Key Performance Indicators

## Report Library

-  **Report Library**  
Select and edit reports

3. This will display a list of all of the reports in the system.

**Note:** Reports are listed in alphabetical order.

Torexretail

Torex Administrator

Week 36 : 03 December 2006

Home

Log off

Name	Owner	Private	Create date
<input type="radio"/> Assigned Budget - Role Hours and Costs 2007-08	Torex Administrator	<input checked="" type="checkbox"/>	20-Oct-2006
<input type="radio"/> Assigned Budget - Task Hours 2007-08	Torex Administrator	<input checked="" type="checkbox"/>	15-Nov-2006
<input type="radio"/> Budget Costs Report	Torex Administrator	<input checked="" type="checkbox"/>	01-Dec-2006
<input type="radio"/> Hours and Cost Report	Torex Administrator	<input checked="" type="checkbox"/>	28-Nov-2006

Display

Edit

New

Delete

Copy

Torexretail

1. The first column, on the left hand side of the screen, displays the report **Name**.
2. The second column shows the owner (creator) of the report.
3. The third shows if the report is a **Private** report for example, created by the current user and not set to be viewed by everyone.

4. The fourth column shows the date the report was created.

## Display a Report

There are 2 ways to display a report from this screen:




1. To left click name of the report. When you hover over the name, it will become underlined. Click name and the report will be loaded.
2. To click in the radio button to the left of the name. The report will become highlighted and you can then click **Display** at the bottom of the screen.

## Using a Report

1. When you open a report, a screen, similar to that below, will be displayed:

The screenshot shows the Torexretail web application interface. At the top, there's a header with the Torexretail logo, the user role 'Administrator', and the date 'Week 48 : 27 November 2006'. There are 'Home' and 'Log off' buttons. Below the header, the main content area is titled 'Budget Costs Report'. It features a navigation bar with tabs for 'Company View', 'Site View', 'HR View', and 'Date View', each with a radio button and a list of icons. The 'Company View' tab is selected, showing a table with columns for 'Peer review', 'Summary', and 'Date View'. The 'Peer review' column has a radio button and a list of icons. The 'Summary' column shows 'Enterprise' and '0000 : Whole Store'. The 'Date View' column shows 'Week 48 27/11/06'. To the right of the table is an 'Exports' section with icons for Excel and PDF. Below the table is a 'Budget Costs' section with a table showing 'Enterprise' and '0.00' for 'Budget Costs' and '0.00' for 'Budget Additional Costs'. At the bottom right, there's a 'Torexretail' logo.

### Open Report window

2. Most of the screen will be taken up with the report data.
3. This information in the report can be expanded or reduced, by using the **Filters** at the top of the screen.
4. The  icon will return you to the Report list.
5. The  icon will refresh the report, to ensure you have the most up-to-date information.
6. The  icon sends the report to your printer.

## Filters

The filters at the top of the screen can be used to navigate through any report. The 4 views are standard to the system, but more can be added on request.

- Company View
- Site View
- HR View
- Date View

Company View	Site View	HR View	Date View
Peer review	Summary	Summary	Summary
Enterprise	0000 : Whole Store	Whole Store	Week 48 27/11/06

## Filter window

The small green buttons, allow the data to be manipulated and the report to display different information for example,



- These buttons allow you to navigate through specific areas of the report, for example. If I clicked the left button, next to the **Date View**, the report would display data for the week before. Clicking right arrow would show data for the week ahead.



- These buttons allow you to 'Drilldown' different levels of the selected data, for example. If I clicked the down arrow button, next to the **Company View**, the report would display the company data for the level below.



- When clicked, this **Expanded** button, will display all of the selected KPI data to its lowest level, for example. If I clicked this button next to **Date View ALL** dates down to a daily level would be displayed.



- When clicked, this **Peer Review** button, will display data for information at the same level as that selected for example,


Area 1 contains:


- Store A
- Store B
- Store C

If we were viewing the information for Store B and then clicked this **Peer Review** button, the information for Stores A and C would also be displayed.

## Exports

There are two methods to export the report information from the system, which are displayed in the top right hand corner of the report. This information can be exported automatically at a pre-determined time using the **Autorun** functionality.

1. Clicking Excel icon  will open the report in Microsoft Excel.

2. Clicking PDF icon  will open the report in Adobe Acrobat format.

---

**Note:** The **Autorun** option cannot be manually run by the user. The system can be configured to export the required information at a pre-defined time. Speak to your Torex Retail Account Manager for further information regarding the implementation of this option.

---

## Edit a Report

1. To edit a report, click in the circular button, next to the name of the report you want to edit.
2. Click **Edit** at the bottom of the screen.
3. All of the report details will be displayed.
4. Change or add any required information and once complete, click **OK** to save the changes.

## Create a New Report

1. To create a new KPI Report, click **New** at the bottom of the screen.
2. A screen, similar to the one below, will be displayed:

**Torexretail** Administrator Week 32 : 05 November 2006 Log off

### KPI Report Editor

There are one or more validation errors. You must correct these errors before you can save the information. Try again

- Missing required field: Report name
- Missing required field: Report title
- No groups defined

**Main Details**

Report name  Allow other users to view this report ☐

Created 09-Nov-2006 by Administrator

Title  Description

**Groups** Bands Context

There are no groups

Add Group Delete Group(s) Move Group(s) Up Move Group(s) Down

OK Cancel Apply

**Torexretail**

### Report Editor window

---

**Note:** The top of the screen displays a series of warnings, notifying you that some of the mandatory fields have not yet been completed. These are there to help you and will disappear, as you create the report.

---

3. The first thing to do is to type in the **Report Name**. This will be used to identify the report in the **Report Library** List.

4. If you want this report to be available to all users (and you have the access rights to do this), check the **Allow other users to view this report** tick box.
5. The system will automatically generate a **Created** date and display the user who is creating it.
6. Enter the **Title**. This will be displayed at the top of the report.
7. Enter a **Description**. This will also be displayed at the top of the report. It will help to give an insight into the purpose of the report.
8. Information on other aspects of creating a report can be found below. Once you have finished, click **OK** to save the report and be returned to the report list.

### Add a Group

1. To add a Group to the report, click **Add Group** at the bottom of the screen.
2. The screen will change and information, similar to that below, will be displayed:

The screenshot shows the 'Add a Group' window. It has a title bar with 'Groups', 'Bands', and 'Context' tabs. The 'Groups' tab is selected. The main content area is light blue and contains the following sections:

- Name:** A text input field.
- Description:** A text input field.
- Columns:** A text input field with a warning icon and the text 'Please add one or more columns'. Below it are buttons for 'Add', 'Remove', 'Move Up', 'Move Down', and 'Edit'.
- Sort options:** A dropdown menu showing 'Sorted by Context' with an upward arrow icon.

At the bottom right of the window, there are four buttons: 'Add Group', 'Delete Group(s)', 'Move Group(s) Up', and 'Move Group(s) Down'.

### Add a Group window

3. In the **Name** field, type in an appropriate name for the Group.
4. Enter a meaningful **Description**. This will be displayed on the report.

## Add a Column

1. To add a column to the group, click **Add**.
2. A screen, similar to that below, will be displayed:

**Torexretail** Administrator Week 48 : 27 November 2006 [Log off](#)

**Column Settings**

Column Name

KPI

Formatting string

Formatting rules

Select	Test	Link to	Formatting string	Message	Image
There are no rules					

[Add Rule](#) [Delete Rule\(s\)](#) [Move Rule\(s\) Up](#) [Move Rule\(s\) Down](#) [OK](#) [Cancel](#)

**Torexretail**

### Add a Column window

3. Type in an appropriate name in the **Column Name** field.
4. From the **KPI** list, select the relevant information to be displayed in the report.
5. Changing the information in the **Formatting String** field, will alter the way the column data is displayed in the report.

The values which can be entered are:

- |                |   |  |
|----------------|---|--|
| #              | - | Is for unpadding decimal values                              |
| 0              | - | Is for padding decimal values                                |
| ,              | - | Inserts a comma  |
| % (at the end) | - | multiplies values by 100 and adds the % symbol               |
| \$/£/€         | - | Inserts the defined monetary symbol as a prefix to the value |

For example, if you had a value of 5500000.56 pounds you would enter the following into the **Formatting String** column **£#,###,##0.00** – this would be displayed as **£5,500,000.56**. If you had a value of 0.2456, which you wanted to show as a percentage, you would enter the following **##0.00%** - this would be displayed as **24.56%**.



## Formatting Rules

### Add a Rule

1. To add a Rule, click **Add Rule**, at the bottom of the screen.
2. The screen will display additional information:

Formatting rules

Select	Test	Link to	Formatting string	Message	Image
<input type="checkbox"/>	<input type="text"/>	No action	<input type="text"/>	<input type="text"/>	No image

### Add a Rule window

3. Click small arrow button, next to the **Test** field, to enter the Rule parameters.
4. Clicking on this button will display a screen, similar to that below:

-- Web Page Dialog

Script editor

Object	Test Value
Budget Hours	1
Budget Costs	1
Budget FTEs	1
Clearview Hours	1
Clearview Costs	1
Additional Costs	1
Clearview FTEs	1
Budget Additional Costs	1
Clearview Total Cost	1
Budget Total Cost	1
Allowed Hours	1
Standard Hours	1
Standard Cost	1
Allowed Cost	1

Type	Macro	Parameters
any	\$If	(p1,p2)
number	\$IncRnd	(p1)
number	\$Step	(p1,p2,p3)
number	\$For	(p1,p2,p3)

Test | OK | Cancel

### Add a Rule window

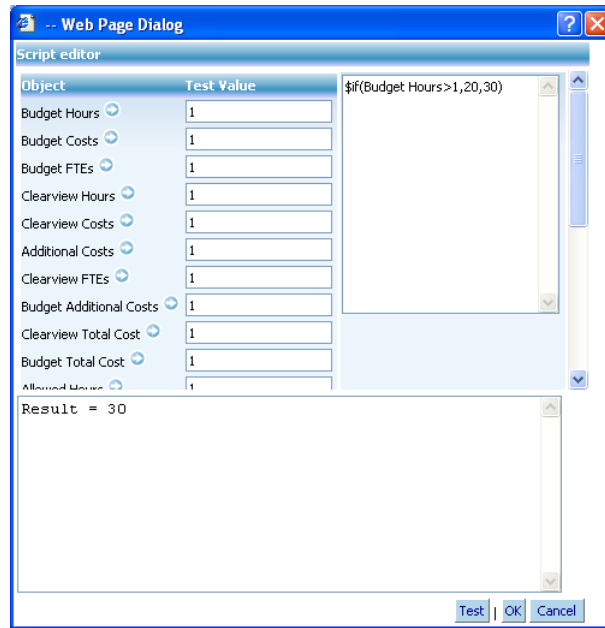
5. This screen allows you to enter a series of Macros in the top right hand side box and to test the results.

6. A simple example of a Macro would be:

\$if(Budget Hours>1,20,30

In English, this Macro says – If the object **Budget Hours** has a value of greater than **1**, then show the number **20**, otherwise, show the number **30**.

This result can be seen below. Entering the Macro in the top right hand box and clicking **Test**, displays the **Result**.



#### Test button window

7. Once an appropriate Macro has been written, click **OK** to return to the previous screen.
8. The Macro text will be displayed in the **Test** field.
9. The **Link to** list should always be set to **No action**.
10. Changing the information in the **Formatting String** field, will alter the way the data is displayed in the report.






The values which can be entered are:

#	-	Is for unpadded decimal values
0	-	Is for padded decimal values
,	-	Inserts a comma
% (at the end)	-	multiplies values by 100 and adds the % symbol
\$/£/€	-	Inserts the defined monetary symbol as a prefix to the value

For example, if you had a value of 5500000.56 pounds you would enter the following into the **Formatting String** column £#,###,##0.00 – this would be displayed as **£5,500,000.56**. If you had a value of 0.2456, which you wanted to show as a percentage, you would enter the following **##0.00%** - this would be displayed as **24.56%**.

11. The **Message** field is used for entering a message to precede the value outputted against this particular column.

The message is only available if an Image is associated with the Formatting Rule and the message is displayed, whilst moving the cursor over the associated image. The message below is displayed, whilst hovering over the Green Image:

Compliance Check	
10	
10	
10	
10	
10	
Figures are within agreed range: 210.00	

#### Compliance Check window

- The **Image** field can be used to select an image to pictographically display the formatting Rule based on the outcome of the Test Statement.

For example, if the agreed total budget guideline was 500 million pounds, the leeway was 4% and you entered the following in the **Test** field.

**Clearview Total Costs => 480,000,000 and Clearview Total Costs <= 520,000,000**

You could assign a Green image to this statement, to quickly show to the user that the generated budget figures are correct. Alternatively you could then set up a further rule with a red image with the following test

**Clearview Total Costs < 480,000,000 or Clearview Total Costs > 520,000,000**

to show the user that the generated budget figures are not correct.

#### Delete a Rule

- To delete a Rule from the list, click in the tick box, under the **Select** column, next to the Rule to be deleted.

Formatting rules					
Select	Test	Link to	Formatting string	Message	Image
<input type="checkbox"/>	<input type="text"/>	No action	<input type="text"/>	<input type="text"/>	No image

#### Delete a Rule window

- Click **Delete Rule(s)** at the bottom of the screen.
- The Rule will be removed from the list.

---

## Move Rules

1. To move a Rule in the list, so it is displayed in a different order, click tick box, under the **Select** column, next to the Rule to be moved.

Formatting rules					
Select	Test	Link to	Formatting string	Message	Image
<input type="checkbox"/>	<input type="text"/>	No action	<input type="text"/>	<input type="text"/>	No image

### Move Rules window

2. Click **Move Rule(s) Up** or **Move Rule(s) Down** to move the rule up or down one place at a time.
3. Click buttons multiple times to move the Rules further up or down the list.

## Remove a Column

1. To remove a column from the list, click appropriate name and then click **Remove**.

## Move a Column

1. To move a column, so that it is displayed in a different order on the report, click Column name and either click **Move Up** to move it up once or **Move Down** to move it down once.
2. Clicking these buttons multiple times will move the selected column up the column list.

## Edit a Column

1. To edit an existing column, click appropriate column name and click Edit.
2. This will then display the **Add** column screen, but the information will be populated. Change or add any applicable data and then click **OK**.

## Sort Options

1. The Sort options allow you to change the way that information is sorted in the report. By default, it is set to allow the **Context** screen to control the sorting (See page 21 for further information).

Sort options	Sorted by Context
--------------	-------------------

### Sort Options window

2. To change the way that the report is sorted, click **Sorted by Context** link.
3. A screen, similar to that below, will be displayed:

## Sort options

Key sort direction Up ▼

Limit ▲ Top 0

## Columns

Select	Column	Direction
--------	--------	-----------

Add Column

Remove Column(s)

Move Column(s) Up

Move Column(s) Down

OK Cancel

## Sorted by Context window

4. The **Key Sort Direction** drop down allows you to either sort the values in the data column up or down (alphabetically/numerically).
5. Click **Key sort direction** list and select the way in which you would like the data to be sorted, **Up** or **Down**.
6. For example if you had the following in the Company View:
  - Store 1
  - Store 2
  - Store 3
  - Store 4
7. If you had it sorted by **Up**, it would appear on the report as above.
8. If you had it sorted by **Down**, it would appear as follows:
  - Store 4
  - Store 3
  - Store 2
  - Store 1
9. The **Limit** option allows you to display a specified number of records in the report.
10. For example if you have, in Company View, Stores 1-100 and you had the **Key Sort Direction** set to **Up** and entered a value of 30 against the **Limit**, you would get a report showing the data for the first thirty stores in ascending order (i.e. 1-30, 1 at the top).

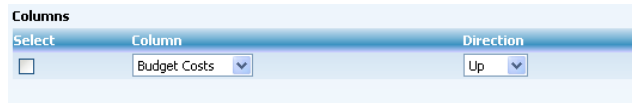
However if you selected the **Key Sort Direction** as **Down** and run the report again you would see the last thirty stores in descending order (i.e. 100-71, 100 at the top).

---

## Columns

### Add Column

1. To add a Column for the report to be sorted on, click **Add Column**, at the bottom of the screen.



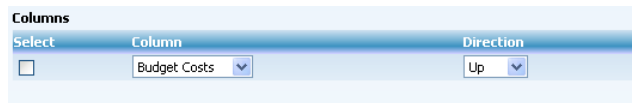
Select	Column	Direction
<input type="checkbox"/>	Budget Costs	Up

### Add Column window

2. The **Column** field will display Columns which have been included in this Group. Click appropriate Column from the list.
3. Click **Direction** list and select the way that the data should be sorted, **Up** or **Down**.
4. Repeat the process for as many Columns as necessary.
5. When ready, click **OK** at the bottom of the screen to confirm or **Cancel** to disregard any changes.

### Remove Column

1. To remove a column from the list, tick the **Select** box, next to the relevant Column name.



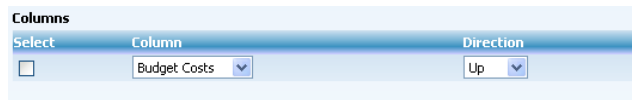
Select	Column	Direction
<input checked="" type="checkbox"/>	Budget Costs	Up

### Remove Column window

2. Click **Remove Column(s)** at the bottom of the screen.
3. The Column will be removed from the list.

### Move a Column

1. To move a column up or down one place in the list, tick the **Select** box, next to the relevant Column name.



Select	Column	Direction
<input checked="" type="checkbox"/>	Budget Costs	Up

### Move a Column window

2. Click **Move Column(s) Up** or **Move Column(s) Down** to move the Column.
3. Clicking buttons multiple times, will move the Column further up or down the list.

### Delete a Group

1. To delete a group, click in the tick box, next to the name of the relevant group.



Name
<input checked="" type="checkbox"/>

### Delete a Group window

2. Click **Delete Group(s)** at the bottom of the screen.
3. You will be asked; **Are you sure you want to remove selected groups?** If you are, click on **OK**, otherwise, click **Cancel**.

4. The group will then be removed.
5. If you tick multiple groups and then click **Delete Group(s)**, all of the selected groups will be removed.

### Move a Group

1. To move a group, so that it is displayed in a different place in the report, tick the box next to the **Name** field.

The screenshot shows the 'Groups' tab with the 'Name' checkbox checked. A text input field is positioned to the right of the checkbox.

### Move a Group window

2. To move the group, either up or down one level, click **Move Group(s) Up** or **Move Group(s) Down**.
3. Click them multiple times to continue moving the group.

### Add a Band

1. To add a band to the report, click **Bands** heading in the middle of the screen.

The screenshot shows the 'Bands' tab selected in the software interface.

### Bands button

2. Click **Add Band** at the bottom of the screen.
3. A screen, similar to that below, will be displayed:

The screenshot shows the 'Add Band' window. It has a 'Name' checkbox and a text field, a 'Description' text field, and a 'Filters' section with a table. The table has columns: Select, Filter, Type, and Setting. Below the table is the text 'There are no filters'. At the bottom right are buttons: 'Add filter', 'Delete filter(s)', 'Add Band', 'Delete Band(s)', 'Move Band(s) Up', and 'Move Band(s) Down'.

### Add a Band window

4. Type a relevant name for this Band, in the **Name** field.
5. Enter an appropriate **Description**.

### Add a Filter

1. To add a filter to the Band, click **Add filter**.

The screenshot shows the 'Add Filter' window. It has a 'Filters' section with a table. The table has columns: Select, Filter, Type, and Setting. One filter is added: 'Company' with a dropdown arrow. Below the table are buttons: 'Add filter', 'Delete filter(s)', 'Add Band', 'Delete Band(s)', 'Move Band(s) Up', and 'Move Band(s) Down'.

### Add a Filter window

2. Select the appropriate **Filter** from the list.
3. Select the appropriate **Type** from the list.
4. Choose the relevant **Setting** from the list.
5. To add another filter to the Band, repeat the process above.

### Delete a Filter

1. To delete a filter, click in the tick box, under the **Select** heading.

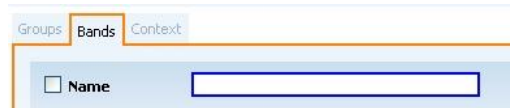


### Delete a Filter window

2. Click Delete filter(s).
3. The filter will be removed from the list.

### Delete a Band

1. To delete a Band from the list, click in the tick box, next to the **Name** field.



### Delete a Band window

2. Click **Delete Band(s)**.
3. You will be asked **Are you sure you want to remove the selected bands?** Click on **OK** to confirm or **Cancel** to disregard any changes.

### Move a Band

1. To move a Band in the list, click in the tick box, next to the **Name** field.



### Move a Band window

2. To move the Band up or down one level in the report, click **Move Band(s) Up** or **Move Band(s) Down**.



## Context

1. To change the **Context** settings, click Context heading, in the middle of the screen.



### Context

2. A screen, similar to that below, will be displayed:

Groups Bands Context

Show context controls on report ☒

Type	Mode	Visible	Override
Company	Summary	<input checked="" type="checkbox"/>	Default
Site	Summary	<input checked="" type="checkbox"/>	Default
HR	Summary	<input checked="" type="checkbox"/>	Default
Dates	Summary	<input checked="" type="checkbox"/>	Default
Custom field	Mode	Visible	
Custom Field 1	Summary	<input type="checkbox"/>	
Custom Field 2	Summary	<input type="checkbox"/>	

Date context options

Lowest level for drilldown: Week

☒ Limit earliest selectable date Offset by 4 Week

☒ Limit latest selectable date Offset by 4 Week

### Context window

3. Unticking the **Show context controls on report** box, will hide the filters from the report. This means the user will not be able to interact with the report.

### Type

1. The 4 main filters are listed in the **Type** section:
  - Company
  - Site
  - HR
  - Dates
2. The Mode settings, allow you to set which level of information is displayed in the report, when it is opened.
  - a. By default the **Mode** for each **Type** is set to **Summary**. This means that by default, the report will show the highest level of information available. Using the **Company Type** as an example, this may be **Head Office**.
  - b. Setting the **Mode** to **Drilldown**, will show the next level of information for example, Area 1, Area 2 etc.
  - c. Setting the **Mode** to **Pear Review**, will show any types at the same level as the default one.
  - d. Setting the **Mode** to **Expanded**, will show all types available, for example, All Stores and Sites.

3. Unticking the **Visible** box, will hide the relevant **Type** from the report screen.
4. The **Override** settings, allow you to set which specific information is displayed in the report.
  - a. Using the **Company Type** as an example, if we left the **Override** option as **Default**, it would display all of the Stores and Areas available.
  - b. If we set the **Override** to **Yes**, the screen will display the **Set override options** link.

#### Set Override window

- c. Clicking on this link will display a list of all of the Stores and Areas. Tick the appropriate option from the list and click **Finish** to return to this screen. For example, ticking the Birmingham store would mean that this report will only display information for this store.
- d. If we set the **Override** to **Defer**, when the report is run, it will present the user with the list of Stores and Areas, so that they can select which option they want the report to display.

#### Custom Field

**Custom fields** can be added to the system. These will appear with the other filters at the top of the report. Speak to your System Administrator, for more information on adding **Custom Fields**.

#### Date Context Options

1. To change the lowest date level which can be displayed in a report, choose your option from the **Lowest level for drilldown** list. Choosing a level of **Day** will increase the size of the report and the time it takes to generate.
2. The selectable date ranges allow you to limit how far back or forward the report can show information. For example, setting the **Limit latest selectable date** range to two Week, will only allow the report to display two weeks' worth of information.

#### Date Context Options window


3. Be aware that to set a figure in the **Limit earliest selectable date** field, you must put a - before the number for example, -2.

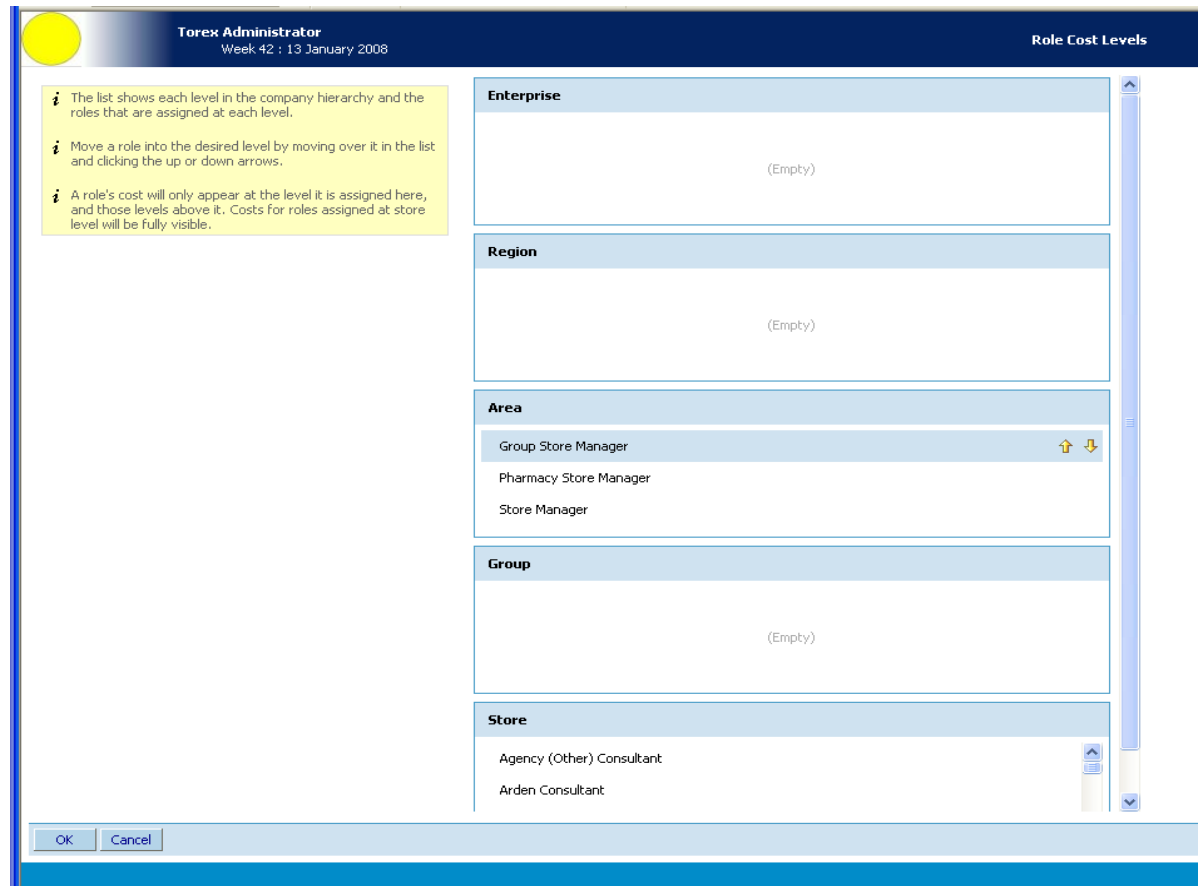
#### Viewing information only at specified levels

To set up, you must:

1. Navigate to **Advanced > Module configuration editors > HR Cost Models > Role Costing Levels** where you will be presented with a screen displaying each level of

the company structure and each role which has been configured within the system – see below:

2. Assign roles to the relevant levels by hovering the cursor over the role you wish to assign
3. Click  button to assign them to the required level



#### View Items at Required Level window

With this set up, you will see the hours and costs associated with all roles when viewing the KPI report at Enterprise, Region or Area level. When the report has been drilled down to Group or Store level (or the user only has access to these levels), the hours for all roles will still be visible but the costs for the Store Manager, Group Store Manager and Pharmacy Store Manager will be displayed as zero.

#### Freezing Column Headings

With this functionality enabled, the column headings will remain static on screen when the user scrolls down the KPI report, thus making it easier to see which data is being viewed. To switch this on:

1. Navigate to Advanced > Generic configuration editors > Global configuration and select the file KPI.INI
2. Ensure that there is a line which reads KEEP HEADINGS STATIC=Yes
3. Click OK to save, and then navigate back to the KPI module
4. The next time you open a KPI report you will see that the headings remain static at the top of the screen

---

## Supclick Blank Records

This functionality will remove any rows from the KPI report which have no data in them, for example, all records display 0.00. To configure this option:

1. Navigate to Advanced > Generic configuration editors > Global configuration and select the file KPI.INI
2. Ensure that there is a line which reads SUPCLICK BLANK RECORDS=Yes
3. Click OK to save, and then navigate back to the KPI module
4. The next time you open a KPI report which contains blank records you will see a message indicating that *"Blank rows have been omitted from this report"*

## Delete a Report

To delete a report from the system:

1. Click in the radio button to the left hand side of the report, you want to delete. It will become highlighted.
2. Click **Delete**, at the bottom of the screen.

**Note:** Once a report has been deleted, it cannot be retrieved.

3. A warning message will be displayed, asking **Are you sure you want to delete the selected report?** If you don't want to delete the report, click on **Cancel**, otherwise, click **OK**.
4. The report will then be deleted and you will be returned to report list.

## Copy a Report

If you need to create a new report, but there is already an existing one, which contains much of the configuration, you can use the Copy function. This makes a duplicate of the selected report, which you can then edit and adjust to your requirements.

1. Click in the radio button to the left hand side of the report, you want to copy. It will become highlighted.
2. Click **Copy**, at the bottom of the screen.
3. A field will appear at the bottom of the screen, which displays the text **Copy of <Report Name>**. You can click in this box, edit the text and change the name of the new report.

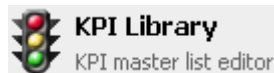


### Copy a Report window

4. When ready, click **Confirm Copy**. This will then make a duplicate of the report, which you can then edit and adjust.

## KPI Library

To view the KPI Library, click KPI Library.



### KPI Library button

1. A screen, similar to that below, will be displayed:

KPIs Actions Images

Select	Name	Data
<input type="checkbox"/>	actualhours	actualhours
<input type="checkbox"/>	budgethours	budgethours
<input type="checkbox"/>	forecasthours	forecasthours
<input type="checkbox"/>	schedulehours	schedulehours

OK Cancel Apply

Add Delete

Torexretail

### KPIs window

## KPIs Tab

### Add a KPI

1. To add a KPI, click **Add**.
2. A screen, similar to that below, will be displayed:

## New KPI

Name	<input type="text"/>
<b>Data Sources</b>	
Name	<input type="text"/>
Data source	Please select... <input type="button" value="v"/>
<b>Transpose dates</b>	
<input checked="" type="radio"/> No time shift	
<input type="radio"/> Shift dates by the following amount	
<b>Restrict date scope</b>	
<input checked="" type="radio"/> No restriction	
<input type="radio"/> Provide data upto specified date	
<input type="radio"/> Provide data from specified date	
<input type="button" value="Add datasource"/> <input type="button" value="Delete datasource(s)"/>	
<b>Summary options</b>	
<input type="checkbox"/> Use summary function	
<input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Apply"/>	

## New KPI window

3. Add an applicable **Name**.
4. Enter the name for the **Datasource**.
5. Select the relevant **Datasource** from the list.
6. Select the relevant date settings.
7. Click **Add Datasource** to add an additional set of data.
8. Ticking the **Use Summary Function** box, presents the following options:

<b>Summary options</b>	
<input checked="" type="checkbox"/> Use summary function	
Name	<input type="text"/>
type	Please select... <input type="button" value="v"/>
Parameter 1	Please select... <input type="button" value="v"/>
Parameter 2	Please select... <input type="button" value="v"/>

## Summary Options window

9. Enter the name and select the relevant KPI parameters from the list and calculation to perform.
10. When ready, click **OK** to save or **Cancel** to disregard.

## Edit a KPI

1. To edit a KPI, click Name, which acts as a link.
2. Make the relevant changes and click **OK** to confirm or **Cancel** to disregard.

---

### Delete a KPI

1. Tick the **Select** box, next to the name you want to delete and click **Delete**.
2. You will be asked **Are you sure you want to remove selected KPIs?** Click **OK** to confirm or **Cancel** to disregard.

## Actions Tab

### Add a New Action

1. To add a new action, click **Add**, at the bottom of the screen.
2. Enter the **Name** and **URL** of the action.
3. Click **OK** to save the information or **Cancel** to disregard.

### Edit an Action

1. To edit an action, make any changes to the text.
2. Click **Apply**, at the bottom of the screen, to update the action.
3. Click **OK** to save the information or **Cancel** to disregard.

### Delete an Action

1. To delete an action, click in the **Select** tick box, next to the relevant action.
2. Click **Delete**, at the bottom of the screen.
3. You will be asked **Are you sure you want to remove selected Actions?** Click **OK** to confirm or **Cancel** to disregard.

## Images Tab

### Add a New Image

1. To add a new image, click **Add**, at the bottom of the screen.
2. In the new line, enter the relevant name and the path location for the image. For example, c:\image.jpg.
3. To preview the image, click **Apply** at the bottom of the screen.
4. To save the image, click **OK** at the bottom of the screen or **Cancel** to disregard.

### Edit an Image

1. To edit an image, make any changes to the text.
2. Click **Apply**, at the bottom of the screen, to update the image.
3. Click **OK** to save the information or **Cancel** to disregard.

### Delete an Image

1. To delete an Image from the list, tick the **Select** box, next to the relevant Image.
2. Click **Delete**, at the bottom of the screen.
3. You will be asked **Are you sure you want to remove selected Images?** Click **OK** to confirm or **Cancel** to disregard.

---

## KPI Report / Main Report

The KPI or Main Report will have been setup by the system administrators. It will be configured to display the relevant information for your store.

1. To view this report click KPIs, followed by the Main Report.



### Main Report button

2. See the **Using a Report** section on Page 8, for further information on navigating the report.



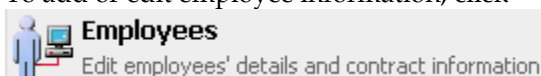
# Human Resources

1. To view the Human Resources information, click



## Employees

1. To add or edit employee information, click



2. A screen, similar to the one below, will be displayed:

**Torexretail** Administrator Week 25 : 16 September 2007 Employees Home Log off

**Select Employee**

Name	Payroll	Primary Task	Start Date	Finish Date
Blue, Barbara	005	0046 : Pharmacist	16/09/07	
Brown, Brian	009	0047 : Management	16/09/07	
Green, Graeme	004	0048 : Coffee Shop	16/09/07	
Grey, Gary	010	0051 : Training	16/09/07	
Indigo, Ivor	006	0047 : Management	16/09/07	
Orange, Oliver	002	0007 : CPU2	16/09/07	
Pink, Paul	007	0020 : Food	16/09/07	
Purple, Patricia	008	0049 : Canteen	16/09/07	
Red, Rosie	001	0042 : MDS Dispensing	16/09/07	
Violet, Valerie	006	0048 : Coffee Shop	16/09/07	
Yasmin, Yellow	003	0048 : Coffee Shop	16/09/07	

Buttons: Select, New Employee, Delete Employee, Control, Transfer

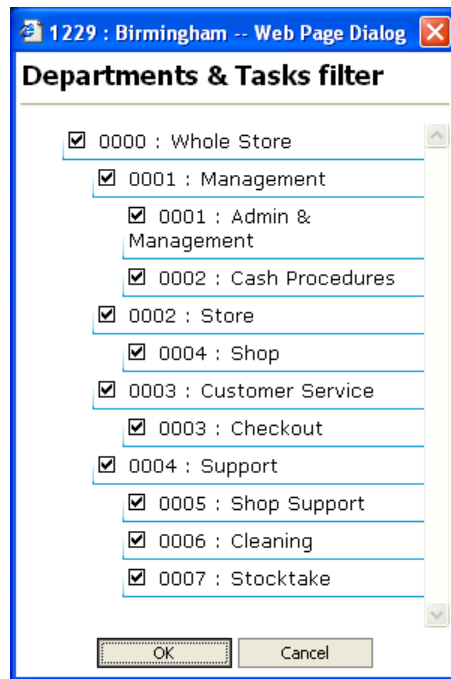
### Select Employees window

3. The standard view, lists all of the employees for the currently selected Store.

---

## Filtering the View

1. Clicking links, in the top left hand corner of the screen, will display a window, similar to that below:



**Departments & Task Filter window**

2. This screen allows you to alter the number of employees displayed on the screen. Unticking a department. For example, **Management** would remove it from the graph, altering its structure.

## Adding a New Employee

1. To add a new employee to the list, click **New Employee**, at the bottom of the screen.
2. A screen, similar to the one below, will be displayed:

## New item

Control Detail Tasks Rotation Pay Rate

Type

Employee

Start Date

11/12/2006

Finish Date

Reason For Leaving

Please Select...

P45 Received

☐

P46 Received

☐

Key

Cancel

Next&gt;

## New Item Control window

3. The **Control** tab contains information, such as when the employee started or left the company. Enter or select all of the relevant information and then click **Next**.

## New item

Control Detail Tasks Rotation Pay Rate

Title

Mr

Surname

Forenames

Job Code

Please Select...

Contract Type

Please Select...

Payroll

Badge

Contracted Hours

0.00

CostModel

Please Select...

Key

&lt;Prev

Cancel

Next&gt;

## New Item Detail window

4. The **Detail** tab contains information, such as name, payroll number etc. Enter the relevant information and then click **Next**.

The screenshot shows the Torexretail Administrator interface. At the top, the header includes the Torexretail logo, the user role 'Administrator', the session information 'Week 50 : 11 December 2006', and buttons for 'Home' and 'Log off'. Below the header, the 'New item' section has tabs for 'Control', 'Detail', 'Tasks', 'Rotation', and 'Pay Rate'. The 'Tasks' tab is active, showing a 'Primary Task' dropdown menu set to '0001 : Admin & Management'. Below this is a table with three columns: 'Assigned', 'Other Tasks', and 'Available'. The 'Assigned' column contains '[No Items]'. The 'Other Tasks' column contains a list of tasks: '0002 : Cash Procedures', '0003 : Checkout', '0004 : Shop', '0005 : Shop Support', '0006 : Cleaning', and '0007 : Stocktake'. Between the 'Assigned' and 'Other Tasks' columns are buttons: '<< Add', 'Remove >>', 'Move Up', and 'Move Down'. Below the table is a 'Key' button. At the bottom of the window are buttons for '<Prev', 'Cancel', and 'Next>'. The Torexretail logo is also visible in the bottom right corner.

Assigned	Other Tasks	Available
[No Items]	<div>&lt;&lt; Add Remove &gt;&gt; Move Up Move Down</div>	0002 : Cash Procedures 0003 : Checkout 0004 : Shop 0005 : Shop Support 0006 : Cleaning 0007 : Stocktake

#### New Item Tasks window

5. Select the appropriate task(s) for the employee, by using **<< Add** and **Remove >>**. When ready, click **Next**.

## New item

[Control](#) [Detail](#) [Tasks](#) [Rotation](#) [Pay Rate](#)

Tmp Change



Selected	Availability List	Available
no items	<a href="#">&lt;&lt; Add Linked</a> <a href="#">[Add New]</a> <a href="#">Remove &gt;&gt;</a> <a href="#">Move Up</a> <a href="#">Move Down</a>	New, Employee <a href="#">v</a>

[Key](#)[<Prev](#)[Cancel](#)[Next>](#)

## New Item Rotation window

6. Select the relevant shift for the employee, by selecting it on the right hand side of the screen and using the **<< Add Linked** to move the option to the employee. If there are no rotation options available or to add new options, click **[Add New]** link (See the Shifts Tab heading, on Page 34, for more information on this process. Once all of the information has been entered, click **Next**.

## New item

Control Detail Tasks Rotation Pay Rate

Basic Type

Hourly

Basic Value

Overtime @ 1.5 Type

Hourly

Overtime @ 1.5 Value

TOIL Type

Hourly

TOIL Value

Key

&lt;Prev

Cancel

Finish

## New Item Pay Rate window

7. Enter the employee pay rates and click **Finish** to add the employee to the store.

## Shifts Tab

This window allows you to add different shifts, which can then be assigned to an employee.

1229 : Birmingham -- Web Page Dialog

Shifts Options Daily Options Select All

There are no items on this page

Save Availability Cancel Edit New Delete

## Shifts window

### Create a New Shift

1. Click **New**.

**1229 : Birmingham -- Web Page Dialog**

**New item**

Start Time: 09:00

Stop Time: 17:30

Shift Type: Contract

ApplytoMonday: ☒

ApplytoTuesday: ☒

ApplytoWednesday: ☒

ApplytoThursday: ☒

ApplytoFriday: ☒

ApplytoSaturday: ☐

ApplytoSunday: ☐

Key:

OK Cancel

#### New Item window

2. Enter the Start and Stop Time.
3. Select the relevant days
4. When ready, click **OK** to save and confirm or **Cancel** to disregard.
5. Click **Save Availability** to save all the details and return to the previous screen.

### Edit a Shift

1. Select the relevant day in the list and click **Edit**.
2. Make any applicable changes and click **OK** to save and confirm or **Cancel** to disregard.

### Delete a Shift

1. To delete a shift, select the relevant line in the list and click **Delete**.
2. You will be asked **Are you sure you want to delete this item?** Click **Yes** to confirm or **Cancel** to disregard.

## Options Tab

The Options tab allows you to name the shift and set options pertinent to the overall pattern. You can tell the system to ignore the minimum rest period rules for this availability pattern by ticking the **Ignore Sleep** tick box, which will allow the scheduling engine to break rules, including the European Working Time Directive, which stipulates the minimum amount of time a person must have to themselves between shifts.

069 : 069 - Mallusk -- Web Page Dialog

Shifts Options Daily Options

Availability Name New Availability

Max Hours 37.50

Ignore Sleep ☐

Min Shifts 0

Max Shifts 0

Min Late Shifts 0

Max Late Shifts 0

Max Long Shifts 0

Flexi Schedule ☐

Min Hours 0.00

Key

Save Availability Cancel

### Options window

## Daily Options

The Daily Options tab allows you to set the break patterns for the employee.



1229 : Birmingham -- Web Page Dialog

Shifts Options **Daily Options**

Day	Break Pattern	Min Span	Max Span
Monday	Default Break Pattern	0.00	0.00
Tuesday	Default Break Pattern	0.00	0.00
Wednesday	Default Break Pattern	0.00	0.00
Thursday	Default Break Pattern	0.00	0.00
Friday	Default Break Pattern	0.00	0.00
Saturday	Default Break Pattern	0.00	0.00
Sunday	Default Break Pattern	0.00	0.00

Save Availability Cancel Edit

#### Daily Options window

1. To edit a break pattern, select the relevant day from the list and click **Edit**.

1229 : Birmingham -- Web Page Dialog

**Edit item**

Day Monday

Break Pattern Default Break Pattern

Min Span 0.00

Max Span 0.00

Shift Bound 0.00

Fix Task Any

Move Contracted ☐

Other Days ☐

Guaranteed Days ☐

No Contract ☐

ApplytoTuesday ☐

ApplytoWednesday ☐

ApplytoThursday ☐

ApplytoFriday ☐

ApplytoSaturday ☐

OK Cancel

#### Edit Item window

2. Make the relevant changes and click **OK** to save and confirm or **Cancel** to disregard.

## Deleting an Employee

1. To delete an employee, select their name in the list and click **Delete**.
2. You will be asked to **Confirm Employee Delete**. Click **Yes** to confirm or **Cancel** to disregard.

## Control

1. Clicking **Control** will display a screen, similar to that below:

**Torexretail** Administrator Week 50 : 11 December 2006 Log off

**Edit Thomas, Ian**

Name: Thomas, Ian

Type: Employee

Start Date: 03/01/2006

Finish Date:

Reason For Leaving: Please Select...

P45 Received: ☐

P46 Received: ☐

Key

OK Cancel

### Edit employee window

2. Make any relevant changes and click **OK** to save and confirm or **Cancel** to disregard.

## Transferring an employee

1. You can transfer an employee from one store to another by first highlighting the employee on the list and then clicking **Transfer**. Doing so will cause a pop-up to appear, like the one shown below:

**Employee Transfer**

Employee : Blue, Barbara

Source Store : 9999 : SAMPLE STORE

Destination Store :

Effective Date : 16/09/2007

*i.e. first day in destination store*

Ok Cancel

### Employee Transfer window

2. Select a store to move the employee to by clicking ellipse adjacent to **Destination Store**. Doing so will open a new screen, like the one shown below:

Search

Search For:

☒ All
☐ Store
☐ Store Link
☐ Region
☐ Store Group

No search

Filter

Store Links

☒ All (7 Store Links)

Forecast Cost Models

001 : Default

Work Standards Models

Wet Model

Dry Model

Commodity Group Patterns

Normal

Trading Profile Patterns

Regions

☒ All (6 Regions)

Hendersons

Area 1

Area 2

Area 3

Area 4

Area 5

Store Groups

☒ All (1 Store Group)

Unassigned

Hold down CTRL to select more than one item

Store	Forecast Cost Model	Region	Store Group
002 : 002 - Limavady	001 : Default	Area 1	Unassigned
029 : 029 - Ballymena	001 : Default	Area 1	Unassigned
033 : 033 - Greystone	001 : Default	Area 1	Unassigned
045 : 045 - Ahoghill	001 : Default	Area 1	Unassigned
047 : 047 - Mountsandel	001 : Default	Area 1	Unassigned
052 : 052 - Randalstown	001 : Default	Area 1	Unassigned
060 : 060 - Templepatrick	001 : Default	Area 1	Unassigned
063 : 063 - Millburn	001 : Default	Area 1	Unassigned
093 : 093 - Castlerock Rd	001 : Default	Area 1	Unassigned
100 : 100 - Cullybackey	001 : Default	Area 1	Unassigned
028 : 028 - Dundonald	001 : Default	Area 2	Unassigned
032 : 032 - Carrowdore	001 : Default	Area 2	Unassigned
035 : 035 - Ashbury	001 : Default	Area 2	Unassigned
042 : 042 - Movilla	001 : Default	Area 2	Unassigned
044 : 044 - Hardford Link	001 : Default	Area 2	Unassigned
055 : 055 - Donaghadee Rd	001 : Default	Area 2	Unassigned
064 : 064 - Rathgael Rd	001 : Default	Area 2	Unassigned
068 : 068 - Rosevale	001 : Default	Area 2	Unassigned
085 : 085 - Belfast Rd	001 : Default	Area 2	Unassigned
089 : 089 - Gransha	001 : Default	Area 2	Unassigned
101 : 101 - Comber Rd	001 : Default	Area 2	Unassigned

46 stores

OK

Cancel

### Search for Store window

You can search for the store you want to move the employee to by using the **Search For** box, or alternatively you can refine the list by using the central **Regions** list. When you have found the store you are looking for, click on it to highlight it, and then click **OK**. You will be returned to the previous screen.

3. Enter the date the employee will become effective in the new store.
4. Click **OK**. If there are no problems you will be returned to the employee list.

## Links

### Non-Attendance

1. To set a new absence for an employee, click **Non-Attendance** link.
2. A screen, similar to that below, will be displayed:

The screenshot displays the Torexretail Administrator web application. The top navigation bar includes the Torexretail logo, the role 'Administrator', the date 'Week 50 : 11 December 2006', and buttons for 'Home' and 'Log off'. A left-hand menu contains links for 'Departments & Tasks', 'Exception Codes', 'Contracts', 'Date Filter Options', and 'Links'. The 'Links' section is expanded, showing a 'Yearly Planner' link. The main content area is titled 'Select item' and features a table with a header 'Name' and an upward arrow icon. The table lists two entries: 'Crenshaw, Pat' and 'Phillips, Sonja'. Below the table, there is a search input field containing 'Cre-Phi' and three buttons: 'Edit', 'New', and 'Delete'. The Torexretail logo is also present in the bottom right corner of the interface.

### Select Item window

Clicking **Yearly Planner** link, will take you to the **Non-Attendance Yearly Planner** screen. More information on using this screen, can be found on in the **Non-Attendance** section on Page 42.

### Create a New Absence

1. To create a new absence, click **New**.

**New item**

Name	<input type="text" value="Please Select..."/>
Exception Type	<input type="text" value="Please Select..."/>
Override	<input type="checkbox"/>
Start Date	<input type="text" value="..."/>
End Date	<input type="text" value="..."/>
Start Time	<input type="text" value="00:00"/>
End Time	<input type="text" value="00:00"/>
Key	<input type="text"/>

OK

Cancel

**New Item window**

2. Select the relevant employee from the list and the details of the absence.
3. Once complete, click **OK** to save and confirm or **Cancel** to disregard.

**Edit an Absence**

1. To edit an absence, select the relevant employee from the list and click **Edit**.
2. Make any relevant changes and click **OK** to save and confirm or **Cancel** to disregard.

**Delete an Absence**

1. To delete an absence from the list, select the relevant employee from the list and click **Delete**.
2. You will be asked **Are you sure you want to delete this item?** Click on **Yes** to confirm or **Cancel** to disregard.

**Employee Details Report**

1. Further information on using the Employee Details report can be found on Page 239.

**Non-Attendance Report**

1. Further information on using the Non-Attendance report can be found on Page  
**Error! Bookmark not defined..**

## Non-Attendance

1. To view the Non-Attendance screen, click



### Non-Attendance

Review the non-attendance planner for the year .

2. A screen, similar to that below, will be displayed:

### Non Attendance window

3. Selecting **All Employees** will load the Non-Attendance planner showing absences for all employees in the current store.
4. Selecting **One Employee** will only load absences for the employee selected in the drop-down menu.
5. Selecting **Add Only** will load the Non-Attendance planner without any absences displayed. You can select individual employees or 'All Employees' once the screen has loaded.

## Departments &amp; Tasks

All Employees

&lt; Prev

2006

Next &gt;

Key

## Exception Codes

## Contracts

## Links

Non-Attendance

	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T						
Jan						1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
Feb			1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28						
Mar			1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31			
Apr					1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30		
May	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31					
Jun			1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30				
Jul					1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	
Aug	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31					
Sep				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30			
Oct					1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	
Nov		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30					
Dec			1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31			

## All Employees window

- By selecting the first option, the screen will display all absences for all staff. Click drop down menu at the top of the screen, to select an individual employee.

## Key

- Clicking **Key**, in the top right hand corner of the screen, will display the following window:

**Yearly Planner Legend**

Bank Holiday

Key Period

Absence

Absence hours >= APT

Absence on Bank Holiday

Absence on Key Period

Click to Close

## Yearly Planner Legend window

- It indicates what each colored square corresponds to. For example, any date with a Yellow background is a Bank Holiday.

---

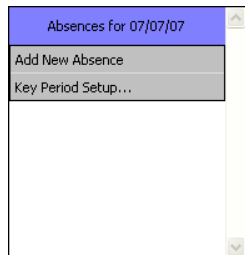
## Adding an Absence

There are 2 ways to add a new absence:

- Directly to the calendar
- Non-Attendance Link

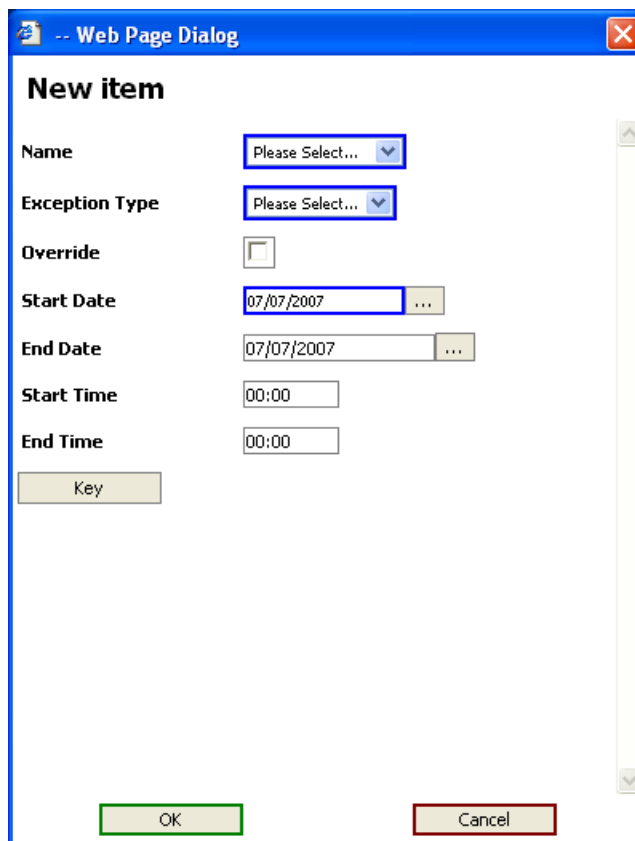
### Direct to the Calendar

1. To add an absence for an employee, click first applicable date.
2. A window will be displayed:



**Absences window**

3. Click on Add New Absence.
4. Another window will be displayed:



**New Item window**

5. Select the employee Name from the list and the Exception Type.
6. Enter the relevant dates and times and click OK to save and confirm or Cancel to disregard.



## Non-Attendance Link

1. Click **Non-Attendance** link, on the left hand side of the screen.
2. The main screen will change and reflect the one below:

The screenshot shows the Torexretail Administrator interface. The top navigation bar includes the Torexretail logo, the user role 'Administrator', the date 'Week 6 : 05 February 2007', and buttons for 'Home' and 'Log off'. A left-hand menu contains links for 'Departments & Tasks', 'Exception Codes', 'Contracts', 'Date Filter Options', 'Links', and 'Yearly Planner'. The main content area is titled 'Select item' and features a table with a single row containing the name 'Thomas, Ian'. Below the table are three buttons: 'Edit', 'New', and 'Delete'. The Torexretail logo is also present in the bottom right corner of the interface.

### Select Item window

3. Click **New**.
4. Enter all of the relevant information and click **OK** to save and confirm or **Cancel** to disregard.

## Editing an Absence

There are 2 ways to edit an absence:

- Directly to the calendar
- Non-Attendance Link

### Direct to the Calendar

1. To edit an absence, click relevant date.
2. A window will be displayed:

The screenshot shows a window titled 'Absences for 06/02/07'. It contains a list of actions: 'Add New Absence', 'Delete Selected', and 'Key Period Setup...'. Below these actions is a list of absences, with the first entry being 'Thomas, Ian - Holiday'. To the right of this entry is a small square icon. The window has a scroll bar on the right side.

### Absence window

3. Click person's name in the list.

4. Make any relevant changes and click **OK** to save and confirm or **Cancel** to disregard.

### Non-Attendance Link

1. Click **Non-Attendance** link, on the left hand side of the screen.
2. The main screen will change and reflect the one below:

The screenshot shows the Torexretail Administrator interface. The top navigation bar is dark blue with the Torexretail logo on the left, the text 'Administrator' and 'Week 6 : 05 February 2007' in the center, and 'Home' and 'Log off' buttons on the right. A left-hand menu contains links: 'Departments & Tasks', 'Exception Codes', 'Contracts', 'Date Filter Options', 'Links', and 'Yearly Planner'. The main content area is titled 'Select item' and contains a table with one row: 'Thomas, Ian' under the 'Name' header. Below the table is a search bar with the text 'Tho' and three buttons: 'Edit', 'New', and 'Delete'. The bottom of the interface has a blue bar with the Torexretail logo on the right.

#### Select Item window

3. Click relevant name in the list and then click **Edit**.
4. Change the relevant information and click **OK** to save and confirm or **Cancel** to disregard.

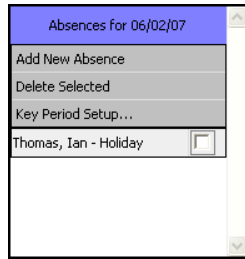
## Deleting an Absence

There are 2 ways to delete an absence:

- Directly to the calendar
- Non-Attendance Link

### Direct to the Calendar

1. To delete an absence, click relevant date.
2. A window will be displayed:

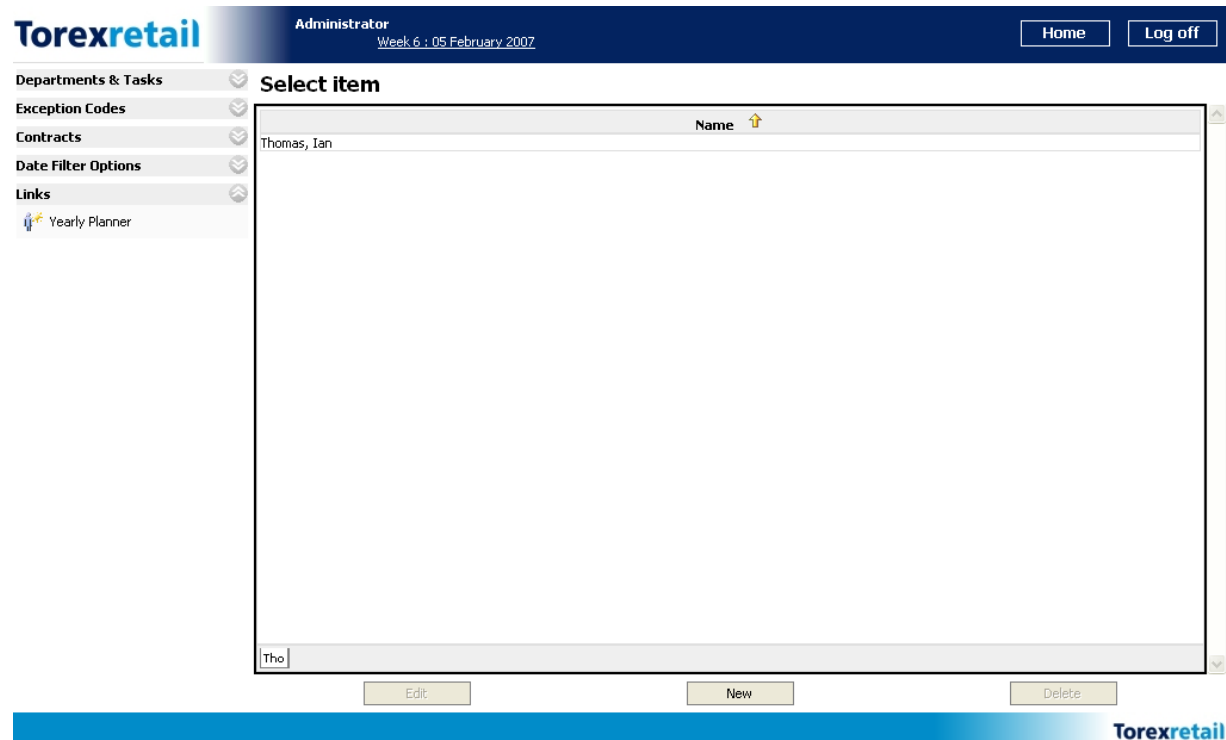


#### Absences window

3. Tick the box, next to the relevant name.
4. Click Delete Selected option.
5. You will be asked Are you sure you wish to delete the following Absence(s)? Click Delete to confirm or Cancel to disregard.

#### Non-Attendance Link

1. Click **Non-Attendance** link, on the left hand side of the screen.
2. The main screen will change and reflect the one below:

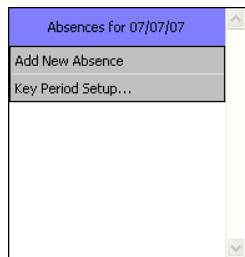


#### Select Item window

3. Click relevant name in the list and click **Delete**.
4. You will be asked **Are you sure you want to delete this item?** Click **Yes** to confirm or **Cancel** to disregard.

## Adding a Key Period

1. To add a Key Period to the Calendar, click first relevant date.
2. A window will be displayed:



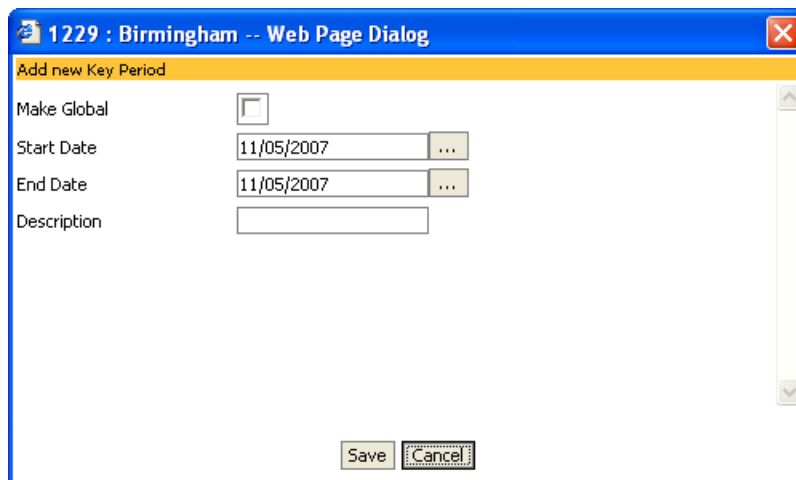
**Absences window**

3. Click **Key Period Setup...**



**Key Period Configuration window**

4. Click **Add**.



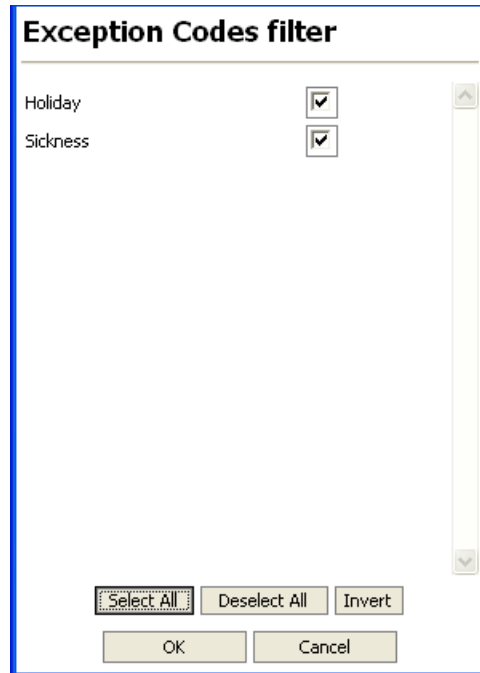
**Add New Key Period window**

5. Enter the relevant date and name and click **Save** to confirm the period or click **Cancel** to disregard.

---

## Filter


1. The filters, on the left hand side of the screen, allow you to limit the information which is displayed on the screen.
2. Clicking **Exception Codes** link, displays a window, similar to that below:



**Exception Codes Filter window**

3. By default the screen will display all holidays and sicknesses. If you untick **Holiday**, the main screen will only show **Sickness**. Make your selection and click **OK** to confirm or **Cancel** to disregard.

## Non-Attendance Holiday Issues

1. To access the Non-Attendance Holiday Issues, click  **Non-Attendance Holiday Issues**  
Review any holiday entitlement issues for this week.
2. A screen, similar to that below, will be displayed:

**1 Employee has Holiday balances outside the min or max values**

Thomas, Ian more than maximum at 10.00

**Holiday window**

3. The screen indicates employees who have discrepancies with their holiday allowances.
4. Clicking applicable name will display the Non-Attendance screen.

## Non-Attendance Calc

**Non-Attendance Calc**

Manually re-calculate absence hours

1. To view the Non-Attendance Calc, click
2. A screen, similar to that below, will be displayed:

**Absence Hours Generate**

The absence system now provides pre-calculated daily absence hours records. These provide very fast access to aggregated absence totals, and subsequently support the entitlements and balances system. In some cases it may be necessary to regenerate the absence hours, for example in older systems that did not provide this functionality.

Select fileset:

**Absence Hours Generate window**

3. From the **Select Fileset** list, select the relevant store or leave it on All Stores and click **Go**.
4. Depending on the stores selected, this may take some time to process.

## Balances Calc



### Balances Calc

Manually re-calculate entitlement balances.

1. To view the Balances Calc, click
2. A screen, similar to that below, will be displayed:


The screenshot shows the Torexretail Administrator interface. At the top, there is a dark blue header with the Torexretail logo on the left, the text 'Administrator' and 'Week 5 : 29 January 2007' in the center, and 'Home' and 'Log off' buttons on the right. Below the header is a light gray bar with the title 'Entitlement Balances Generate'. The main content area has a light gray background and contains the following text: 'The absence system provides a method of determining employees' entitlement balances. These can be for holidays, absence, lieu, etc. If absence configuration that affects balances is updated, then it is necessary to regenerate the balance information.' Below this text are three input fields: 'Select fileset:' with a dropdown menu showing 'All Stores', 'Select the balance:' with a dropdown menu showing 'All', and 'Enter a date within the year in question' with a text box containing '29/01/07' and a 'Go' button. At the bottom of the screenshot, there is a blue bar with the Torexretail logo on the right.

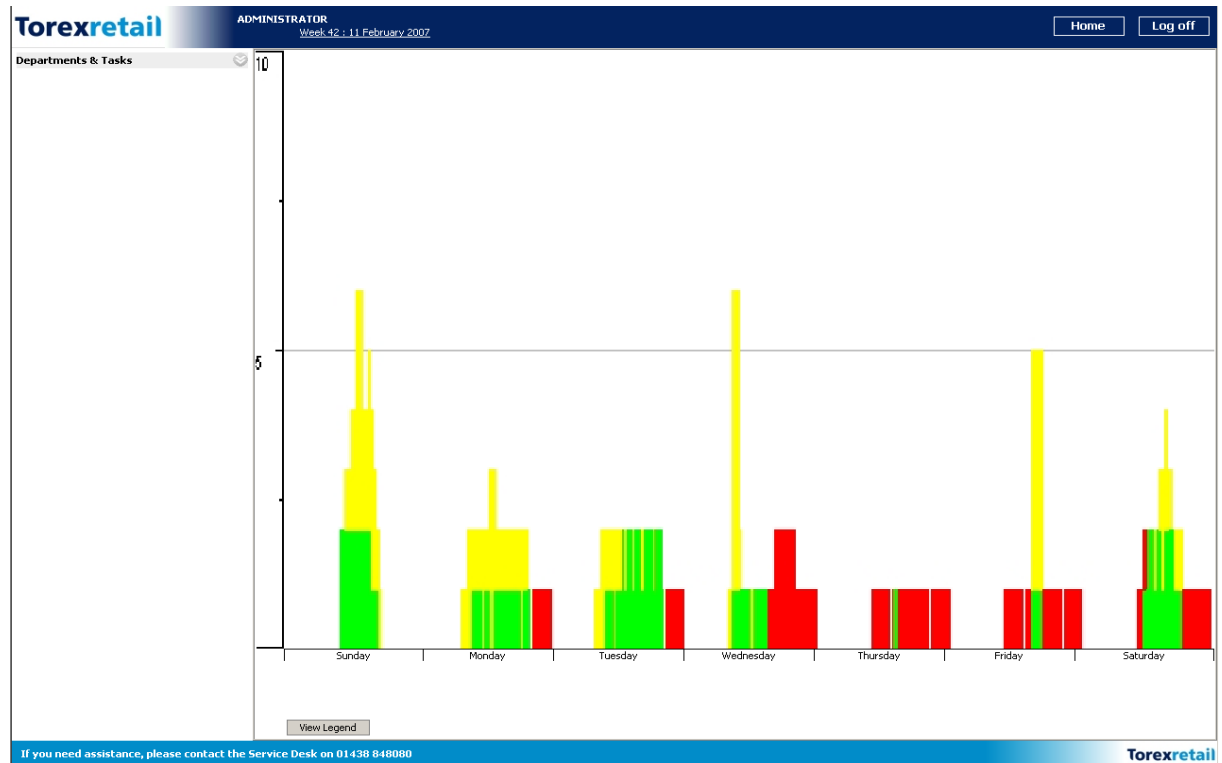
### Entitlement Balances Generate window

3. From the **Select Fileset** list, select the relevant store or leave it on All Stores.
4. Select the relevant **Balance** from the list.
5. Enter an appropriate date and click **Go**.
6. Depending on the stores selected, this may take some time to process.



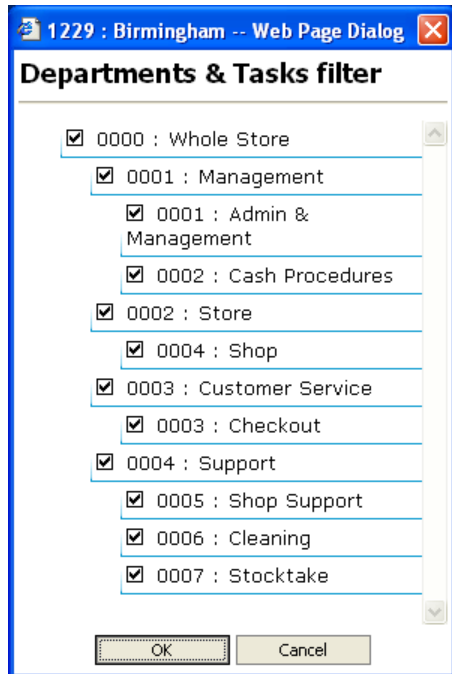
## Contract Fit

1. To view the Contract Fit screen, click  **Contract Fit** See a graph comparing contract fit to workload.
2. A screen, similar to that below, will be displayed:



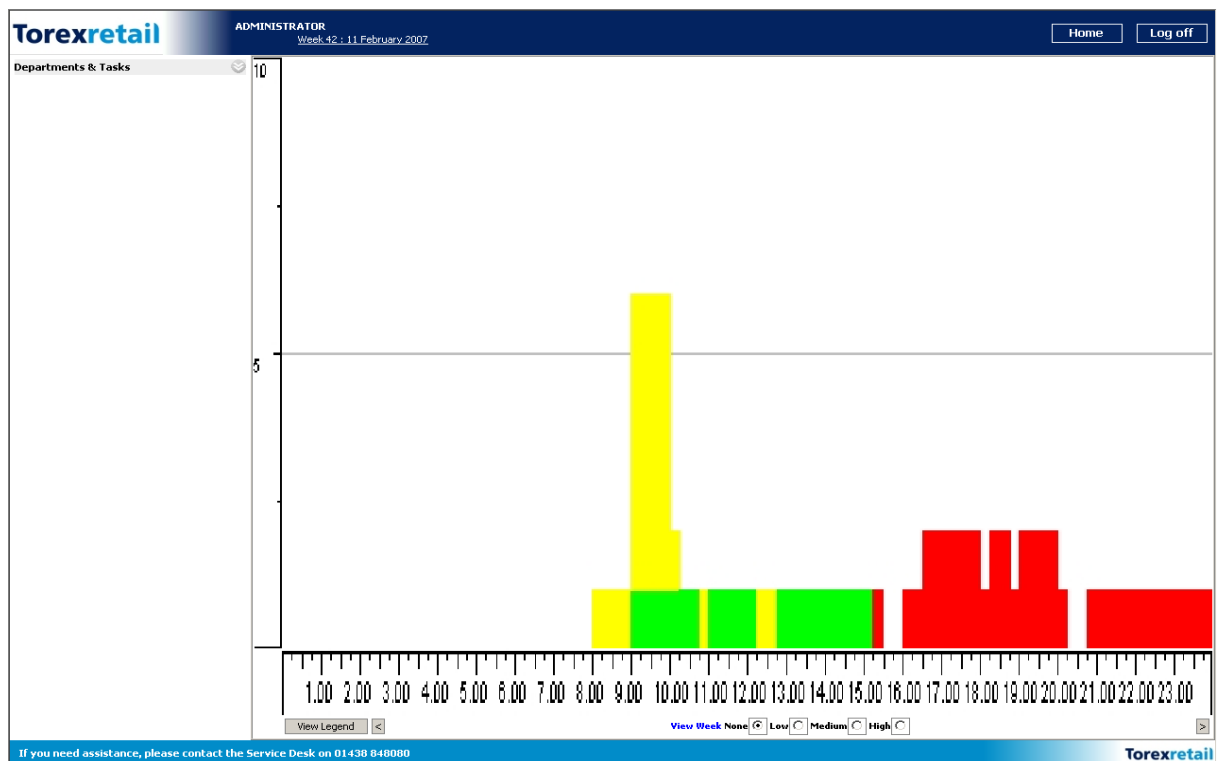
### Contract Fit window

3. Clicking **Departments & Tasks** link, in the top left hand corner of the screen, will display a window, similar to that below:



**Departments & Tasks Filter window**

4. This screen allows you to alter the number of departments and tasks which are displayed in the graph. Unticking a department. For example, **Management** would remove it from the graph, altering its structure.
5. Clicking on one of the days of the week, will display the graph, with the times shown at the bottom of the screen.

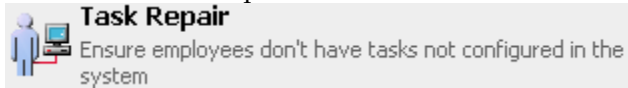


**Days & Times window**

6. Clicking **Low**, **Medium** and **High** options at the bottom of the screen, will zoom into the graph, so that you can see it in more detail.
7. The < and > buttons can be used to scroll through the different times.
8. Click **View Week** link, to return to the previous screen.

## Task Repair

1. To view the Task Repair screen, click



2. A screen, similar to that below, will be displayed:

The screenshot shows the "Task Repair" window within the "Torexretail" application. The header bar is dark blue with "Torexretail" on the left, "Administrator" and "Week 6 : 05 February 2007" in the center, and "Task Repair" on the right. There are "Home" and "Log off" buttons on the far right. The main content area has a title "Task Repair Function" and contains the following text: "The task repair function will remove tasks from employees' selected tasks in HR for any tasks which are not in the task structure. This is to prevent employees being scheduled on those tasks. Enter below a CSV list of tasks that are configured in the task filter. If an employee has a task which is not in this list, it will be removed from that employee. It is recommended that you run the insertDefaultTask.sql script on the database after this process is completed, as there may be employees whose only task was not in the structure, and was removed. Enter task codes which are in the structure: [text box] Go". The text box is empty. The footer of the window is blue with "Torexretail" on the right.

### Task Repair window

3. Enter the relevant task codes and click **Go**.
4. The system will remove any tasks, whose code was not listed in the box.



## Forecasting



1. To access the Forecasting module of the system, click

## Budget

1. To access the Budget information for the week, click



2. A screen, similar to that below, will be displayed:

**Torexretail** Administrator Week 3 : 15 January 2007 Log off



1229 : Birmingham 3 15/01/07

Summary	ALLOWEDHOURS	LCP	PI	STANDARDHOURS	Customers	Items	Sales
<b>Summary</b>							
ALLOWEDHOURS	<input type="text" value="0.00"/>						
LCP	<input type="text" value="0.00"/>						
PI	<input type="text" value="100.00"/>						
STANDARDHOURS	<input type="text" value="0.00"/>						
standardCost	<input type="text" value="0.00"/>						
allowedCost	<input type="text" value="0.00"/>						
absenceHours	<input type="text" value="0.00"/>						
absenceCost	<input type="text" value="0.00"/>						
absencePC	<input type="text" value="0.00"/>						
trainingHours	<input type="text" value="0.00"/>						
trainingCost	<input type="text" value="0.00"/>						
trainingPC	<input type="text" value="0.00"/>						
premiumCost	<input type="text" value="0.00"/>						
Items	<input type="text" value="0"/>						
Sales	<input type="text" value="0"/>						

Recalc OK Cancel Apply

**Torexretail**

### Budget window

3. Enter the values in the relevant fields.
4. Additional information can be found, by clicking tabs at the top of the screen.
5. Clicking  symbol will allow you to view the next level below the Store for example, Department.
6. Clicking  symbol will hide that level from view.

**Torexretail**
Administrator  
Week 3 : 15 January 2007

Log off

**1229 : Birmingham 3 15/01/07**

Summary
ALLOWEDHOURS
LCP
PI
STANDARDHOURS
Customers
Items
Sales

3 15/01/07

1229 : Birmingham	0.00
0001 : Management	0.00
0001 : Admin & Management	<input type="text" value="0.00"/>
0002 : Cash Procedures	<input type="text" value="0.00"/>
0002 : Store	<input type="text" value="0.00"/>
0003 : Customer Service	<input type="text" value="0.00"/>
0004 : Support	<input type="text" value="0.00"/>

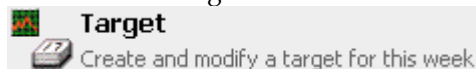
Recalc
OK
Cancel
Apply

#### Allowed Hours window

- Click **Recalc** to update the screen with any changes you have made.
- Click **Apply** to update the screen and to confirm the changes to the system.
- Click **OK** to confirm any changes and close the screen or **Cancel** to disregard.

## Target

- To access the Target information for the week, click





- A screen, similar to that below, will be displayed:

1229 : Birmingham 3 15/01/07

Summary	ALLOWEDHOURS	LCP	PI	STANDARDHOURS	Customers	Items	Sales
<b>Summary</b>							
ALLOWEDHOURS	<input type="text" value="0.00"/>						
LCP	<input type="text" value="0.00"/>						
PI	<input type="text" value="100.00"/>						
STANDARDHOURS	0.00						
standardCost	0.00						
allowedCost	<input type="text" value="0.00"/>						
absenceHours	<input type="text" value="0.00"/>						
absenceCost	<input type="text" value="0.00"/>						
absencePC	<input type="text" value="0.00"/>						
trainingHours	<input type="text" value="0.00"/>						
trainingCost	<input type="text" value="0.00"/>						
trainingPC	<input type="text" value="0.00"/>						
premiumCost	0.00						
Items	<input type="text" value="0"/>						
Sales	<input type="text" value="0"/>						

Recalc | OK | Cancel | Apply

**Target window**

3. Enter the values in the relevant fields.
4. Additional information can be found, by clicking tabs at the top of the screen.
5. Clicking  symbol will allow you to view the next level below the Store for example, Department.
6. Clicking  symbol will hide that level from view.

**Torexretail**
Administrator  
Week 3 : 15 January 2007

Log off

**1229 : Birmingham 3 15/01/07**

Summary
ALLOWEDHOURS
LCP
PI
STANDARDHOURS
Customers
Items
Sales

3 15/01/07

1229 : Birmingham	0.00
0001 : Management	0.00
0001 : Admin & Management	<input type="text" value="0.00"/>
0002 : Cash Procedures	<input type="text" value="0.00"/>
0002 : Store	<input type="text" value="0.00"/>
0003 : Customer Service	<input type="text" value="0.00"/>
0004 : Support	<input type="text" value="0.00"/>

Recalc
OK
Cancel
Apply

#### Allowed Hours window

- Click **Recalc** to update the screen with any changes you have made.
- Click **Apply** to update the screen and to confirm the changes to the system.
- Click **OK** to confirm any changes and close the screen or **Cancel** to disregard.

## Forecast

- To access the Forecast information for the week, click



- A screen, similar to that below, will be displayed:





1229 : Birmingham 3 15/01/07

Summary	ALLOWEDHOURS	LCP	PI	STANDARDHOURS	Customers	Items	Sales
<b>Summary</b>							
ALLOWEDHOURS	<input type="text" value="0.00"/>						
LCP	<input type="text" value="0.00"/>						
PI	<input type="text" value="100.00"/>						
STANDARDHOURS	0.00						
standardCost	0.00						
allowedCost	<input type="text" value="0.00"/>						
absenceHours	<input type="text" value="0.00"/>						
absenceCost	<input type="text" value="0.00"/>						
absencePC	<input type="text" value="0.00"/>						
trainingHours	<input type="text" value="0.00"/>						
trainingCost	<input type="text" value="0.00"/>						
trainingPC	<input type="text" value="0.00"/>						
premiumCost	0.00						
Items	<input type="text" value="0"/>						
Sales	<input type="text" value="0"/>						

Recalc | OK | Cancel | Apply

**Summary window**

3. Enter the values in the relevant fields.
4. Additional information can be found, by clicking tabs at the top of the screen.
5. Clicking  symbol will allow you to view the next level below the Store for example, Department.
6. Clicking  symbol will hide that level from view.

**Torexretail** Administrator Week 3 : 15 January 2007 Log off

**1229 : Birmingham 3 15/01/07**

Summary **ALLOWEDHOURS** LCP PI STANDARDHOURS Customers Items Sales

3 15/01/07

1229 : Birmingham	0.00
0001 : Management	0.00
0001 : Admin & Management	<input type="text" value="0.00"/>
0002 : Cash Procedures	<input type="text" value="0.00"/>
0002 : Store	<input type="text" value="0.00"/>
0003 : Customer Service	<input type="text" value="0.00"/>
0004 : Support	<input type="text" value="0.00"/>


Recalc OK Cancel Apply

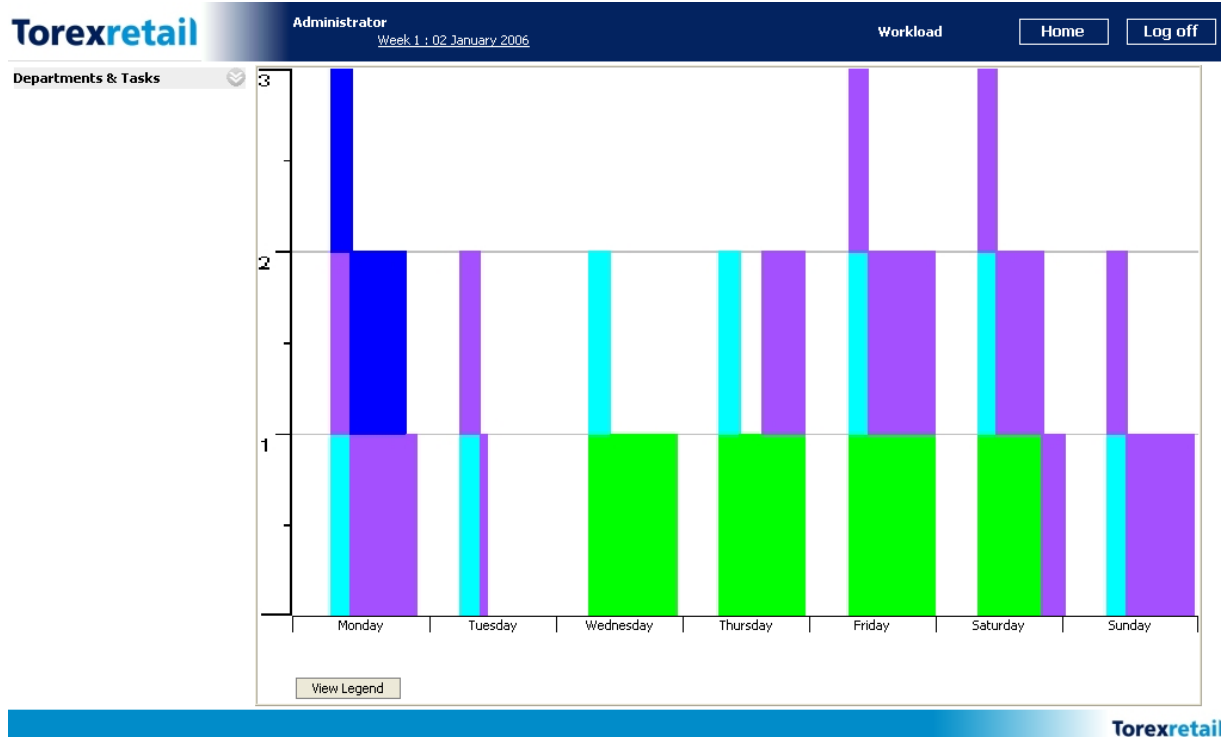
**Torexretail**

#### Allowed Hours window

7. Click **Recalc** to update the screen with any changes you have made.
8. Click **Apply** to update the screen and to confirm the changes to the system.
9. Click **OK** to confirm any changes and close the screen or **Cancel** to disregard.

## Workload

1. To view a graphical representation of the Workload, click  **Workload**.
2. A screen, similar to that below, will be displayed:



#### Department & Tasks window

- Clicking **Departments & Tasks** link, in the top left hand corner of the screen, will display a window, similar to that below:

1229 : Birmingham -- Web Page Dialog

**Departments & Tasks filter**

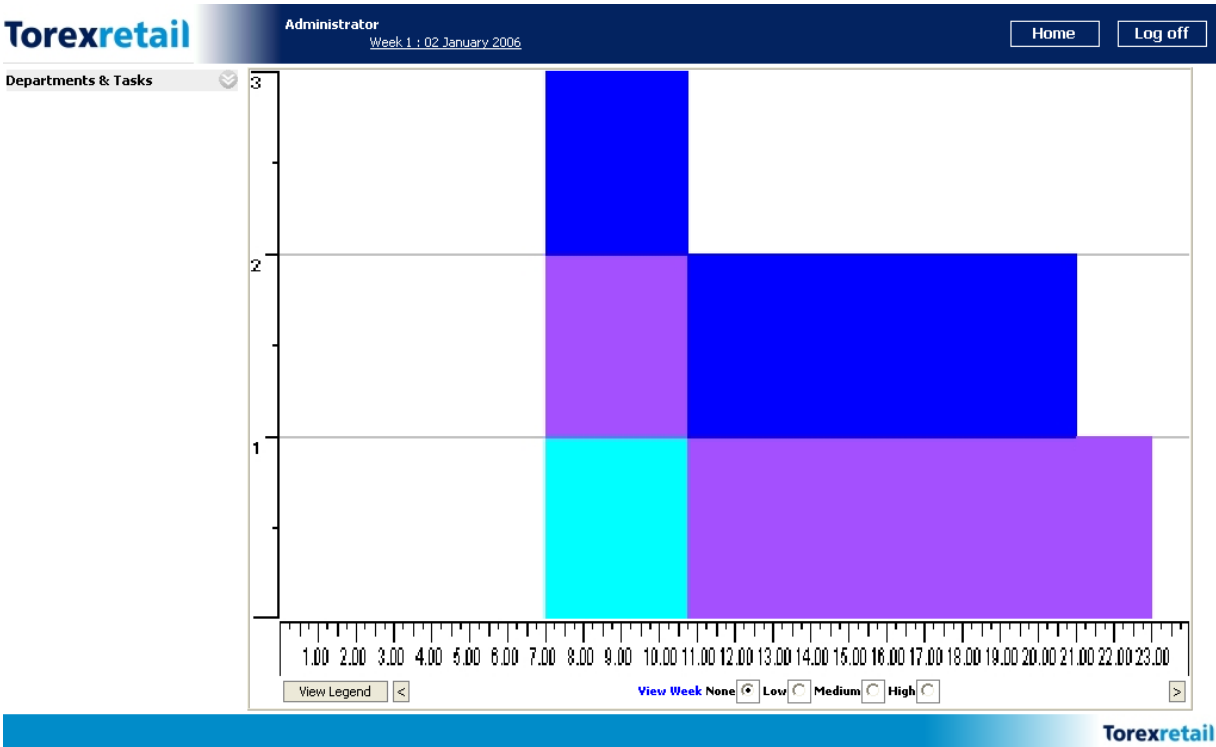
- ☒ 0000 : Whole Store
  - ☒ 0001 : Management
    - ☒ 0001 : Admin & Management
    - ☒ 0002 : Cash Procedures
  - ☒ 0002 : Store
    - ☒ 0004 : Shop
  - ☒ 0003 : Customer Service
    - ☒ 0003 : Checkout
  - ☒ 0004 : Support
    - ☒ 0005 : Shop Support
    - ☒ 0006 : Cleaning
    - ☒ 0007 : Stocktake

OK Cancel

#### Departments & Tasks Filter window

- This screen allows you to alter the number of departments and tasks which are displayed in the graph. Unticking a department. For example, **Management** would remove it from the graph, altering its structure.

5. Clicking on one of the days of the week, will display the graph, with the times shown at the bottom of the screen.

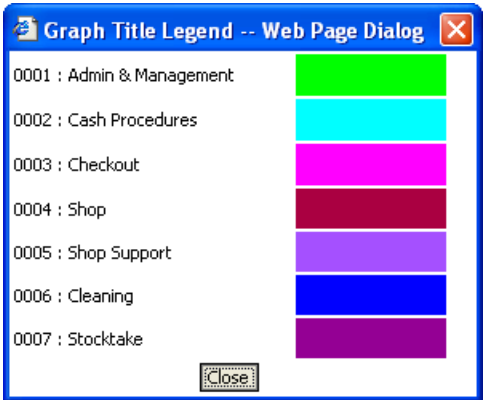


**Graph window**

6. Clicking **Low**, **Medium** and **High** options at the bottom of the screen, will zoom into the graph, so that you can see it in more detail.
7. The < and > buttons can be used to scroll through the different times.
8. Click **View Week** link, to return to the previous screen.

**View Legend**

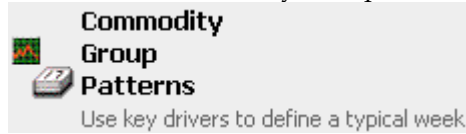
1. Clicking **View Legend** will indicate which task each color corresponds to.



**Graph Title Legend window**

## Commodity Group Patterns

1. To view the Commodity Group Patterns screen, click



2. A screen, similar to that below, will be displayed:

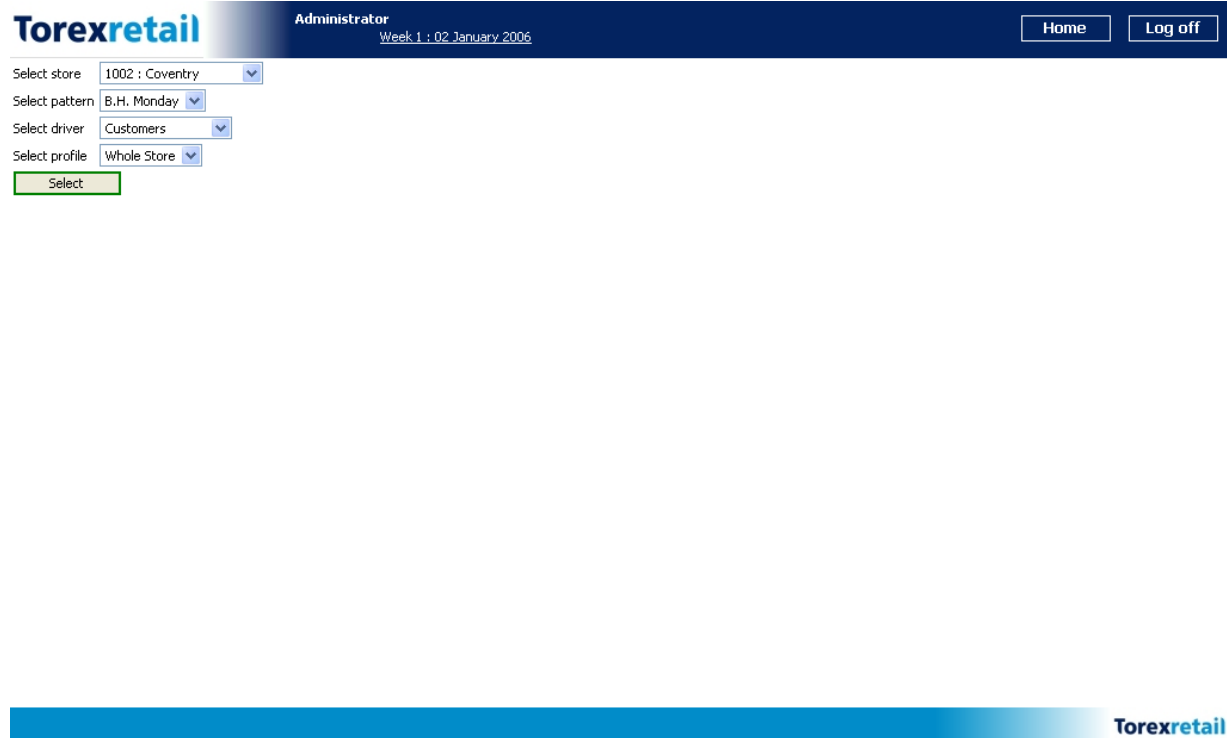
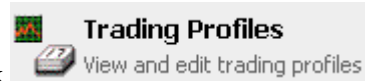
The screenshot shows the "Commodity Profile Editor" window in the Torexretail application. The window has a dark blue header with the Torexretail logo, user information "Administrator Week 3 : 15 January 2007", and a "Log off" button. Below the header is a light blue bar with the title "Commodity Profile Editor" and a "Select fileset" dropdown menu set to "Birmingham - 1229". To the right of this bar is a "Select pattern" dropdown menu with a list of patterns: "Normal", "B.H. Monday", "Easter Week", "GF Week", "Normal", and "Xmas Week". The main area of the window is divided into several tabs: "Customers", "Fuel Transactions", "Items", "Litreage", and "Sales". The "Items" tab is currently selected. Under the "Items" tab, there is a section labeled "Whole Store : Whole Store" with a text input field containing "1,000". To the right of this is a table titled "Edited profiles" with columns "Fileset", "Pattern", and "Driver". The table contains one row: "Birmingham - 1229", "Normal", and "Items". At the bottom right of the window are buttons for "Recalc", "OK", "Cancel", and "Apply".

### Commodity Profile Editor window

3. Select the appropriate Fileset from the menu in the top right hand corner of the screen.
4. Select the appropriate pattern from the top right hand corner of the screen.
5. Once selected, the choice will be displayed under the **Edited Profiles** heading. This displays an audit trail of your choices. The list will be reset, when you exit the screen.
6. Make any changes, clicking headings at the top of the screen.
7. Click **Recalc** to update the screen with any changes you have made.
8. Click **Apply** to update the screen and to confirm the changes to the system.
9. Click **OK** to confirm any changes and close the screen or **Cancel** to disregard.

## Trading Profiles

1. To view and edit the Trading Profiles, click
2. A screen, similar to that below, will be displayed:

A screenshot of a web application interface. At the top is a dark blue header bar. On the left of the header is the "Torexretail" logo in white. In the center of the header, the word "Administrator" is displayed in white, with "Week 1 : 02 January 2006" below it. On the right of the header are two white buttons with blue text: "Home" and "Log off". Below the header, the main content area has a white background. It contains four dropdown menus stacked vertically, each with a label and a blue arrow on the right: "Select store" with "1002 : Coventry", "Select pattern" with "B.H. Monday", "Select driver" with "Customers", and "Select profile" with "Whole Store". Below these dropdowns is a green button with the text "Select". At the bottom of the page is a blue horizontal bar with the "Torexretail" logo in white on the right side.

### Trading Profiles window

3. Select the appropriate **Store**, **Pattern**, **Driver** and **Profile** from the list and click **Select**.
4. A list of all the values for the selected options will be displayed.

1229 : Birmingham, B.H. Monday, Customers, Whole Store

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
00:00	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
00:15	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
00:30	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
00:45	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
01:00	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
01:15	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
01:30	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
01:45	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
02:00	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
02:15	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
02:30	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
02:45	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
03:00	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
03:15	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
03:30	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000
03:45	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000	0.0000

OK Cancel

### List of Values window

5. Make any changes and click **OK** to confirm or **Cancel** to disregard.

## Models

1. To access the Models area of the system, click
2. A screen, similar to that below, will be displayed:



### Models

Create and modify a model

**Torexretail**
Administrator  
Week 4 : 22 January 2007

Home
Log off

Select item

Name ↑	Notes	UserId
Global Model		Administrator
Large Model		Administrator
Medium Model		Administrator
Small Store Model		Administrator

Glo-Sma

Edit Depts
Edit Tasks
Edit Rules
Edit
New
Delete

Torexretail

#### Models window

### Add a New Model

1. To add a new model, click **New**.
2. Enter all of the relevant information and click **OK** to save and confirm or **Cancel** to disregard.

### Edit a Model

1. To edit a model, select the relevant model from the list and then click **Edit**.
2. Make the relevant changes and click **OK** to save and continue or **Cancel** to disregard.

### Delete a Model

1. To delete a model, select the relevant model from the list and then click **Delete**.
2. You will be asked **Are you sure you want to delete this item?** Click on **Yes** to confirm or **No** to disregard.



## Departments

### Add a Department Link

1. To add a Department Link, select the applicable department and click **Edit**, at the bottom of the screen.
2. A screen, similar to that below, will be displayed:

**Torexretail** Administrator Week 4 : 22 January 2007 Log off

**Edit item**

Dept 0004 : Support

Selected	Groups	Available
no items	<div>&lt;&lt; Add Remove &gt;&gt; Move Up Move Down</div>	<div>Whole Store : Whole Store 0001 : Grocery 0002 : Produce 0003 : Frozen 0004 : Bread 0005 : Dairy 0006 : Stationary/News 0007 : General Non-Food 0008 : Confectionery</div>

OK Cancel

**Torexretail**

### Departments window

3. Click relevant Group on the right hand side of the screen and then click **<< Add**.
4. The relevant Group will be moved to the left hand side of the screen.

**Note:** Selecting **Whole Store** will move **all** of the Groups from the right hand side of the screen to the left.

5. To confirm the changes, click **OK** at the bottom of the screen or **Cancel** to disregard any changes.

### Remove a Department Link

1. To remove a Department Link, select the applicable department and click **Edit**, at the bottom of the screen.
2. Click relevant Group on the left hand side of the screen and then click **Remove >>**.
3. The relevant Group will be moved to the right hand side of the screen.

**Note:** Selecting **Whole Store** will move **all** of the Groups from the left hand side of the screen to the right.

4. To confirm the changes, click **OK** at the bottom of the screen or **Cancel** to disregard any changes.

## Move Department Links

1. To change the order of a Department Link, select the applicable department and click **Edit**, at the bottom of the screen.
2. Click relevant Group, on the left hand side of the screen and then click **Move Up** or **Move Down** to change the order.
3. To confirm the changes, click **OK** at the bottom of the screen or **Cancel** to disregard any changes.

## Tasks

1. To edit the task, click **Edit Tasks**.
2. A screen, similar to that below, will be displayed:

The screenshot displays the Torexretail Administrator interface. At the top, the header bar includes the Torexretail logo, the title 'Administrator', the date 'Week 4 : 22 January 2007', and buttons for 'Home' and 'Log off'. Below the header, the main content area is titled 'Select item'. It features a table with three columns: 'Task' (with an upward arrow icon), 'Notes', and 'MinHours'. The table lists seven tasks: '0001 : Admin & Management', '0002 : Cash Procedures', '0003 : Checkout', '0004 : Shop', '0005 : Shop Support', '0006 : Cleaning', and '0007 : Stocktake'. Below the table, there is a search bar containing '000-000'. At the bottom of the interface, there are four buttons: 'Edit Models', 'Edit Task Links', 'Task Constraints', and 'Edit'. The Torexretail logo is also present in the bottom right corner.

Task	Notes	MinHours
0001 : Admin & Management		
0002 : Cash Procedures		
0003 : Checkout		
0004 : Shop		
0005 : Shop Support		
0006 : Cleaning		
0007 : Stocktake		

000-000

Edit Models Edit Task Links Task Constraints Edit

### Tasks window

### Task Links

#### Add a Task Link

1. To add a Task Link, select the applicable department and click **Edit**, at the bottom of the screen.
2. A screen, similar to that below, will be displayed:

## Edit item

Task

0007 : Stocktake

Rules	
Selected	Available
no items	<div> <div>&lt;&lt; Add</div> <div>Remove &gt;&gt;</div> <div>Move Up</div> <div>Move Down</div> </div> <div> Block Rule  Busy Times First  Cash  Checkout Min Cover  Opening Times  Quiet Times First  Stocktake </div>

Groups	
Selected	Available
no items	<div> <div>&lt;&lt; Add</div> <div>Remove &gt;&gt;</div> <div>Move Up</div> <div>Move Down</div> </div> <div> <div>Whole Store : Whole Store</div> <div>0001 : Grocery</div> <div>0002 : Produce</div> <div>0003 : Frozen</div> <div>0004 : Bread</div> <div>0005 : Dairy</div> <div>0006 : Stationary/News</div> <div>0007 : General Non-Food</div> <div>0008 : Confectionery</div> </div>

OK

Cancel

## Edit Item window

- Click relevant **Rules** / **Groups** or **Elements**, on the right hand side of the screen and then click **<< Add**.
- Your selections will be moved to the left hand side of the screen.

**Note:** Selecting **Whole Store** will move **all** of the Groups from the right hand side of the screen to the left.

- To confirm the changes, click **OK** at the bottom of the screen or **Cancel** to disregard any changes.

## Remove a Task Link

- To remove a Task Link, select the applicable task and click **Edit Task Links**, at the bottom of the screen.
- Click relevant **Rules** / **Groups** or **Elements** on the left hand side of the screen and then click **Remove >>**.
- Your selections will be moved to the right hand side of the screen.

**Note:** Selecting **Whole Store** will move **all** of the Groups from the left hand side of the screen to the right.

- To confirm the changes, click **OK** at the bottom of the screen or **Cancel** to disregard any changes.

---

### Move Task Links

1. To change the order of a Task Link, select the applicable task and click **Edit Task Links**, at the bottom of the screen.
2. Click relevant **Rules / Groups** or **Elements**, on the left hand side of the screen and then click **Move Up** or **Move Down** to change the order.
3. To confirm the changes, click **OK** at the bottom of the screen or **Cancel** to disregard any changes.

### Task Constraints

1. To view the Task Constraints, click **Task Constraints**.

#### Add a Task Constraint

1. To add a new Task Constraint, click **New**.
2. Type in the relevant information and click **OK** to save and continue or **Cancel** to disregard.

#### Edit a Task Constraint

1. To edit a Task Constraint, select the appropriate Task from the list and click **Edit**.
2. Change the relevant information and click **OK** to confirm or **Cancel** to disregard.

#### Delete a Task Constraint

1. To delete a Task Constraint, select the appropriate Task from the list and click **Delete**.
2. You will be asked **Are you sure you want to delete this item?** Either click on **Yes** to confirm or **No** to disregard.

## Rules

1. To view the Rules, select the applicable Model and click **Edit Rules**.

#### Edit the Rules

1. To edit a Rule, select the applicable Rule and click **Edit**.
2. Change any relevant information and click **OK** to confirm or **Cancel** to disregard.

#### Edit Daily Options

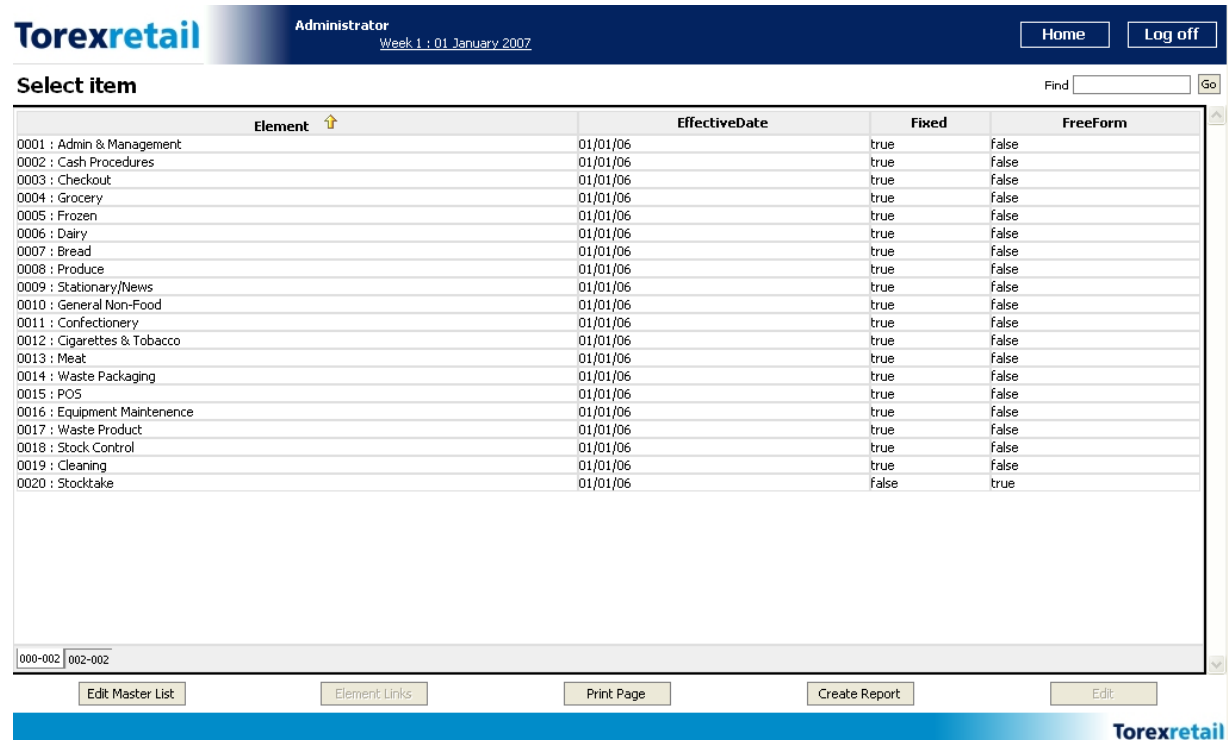
1. To edit the Daily Option, select the applicable Rule and click **Edit Daily Options**.
2. Select the applicable day and click **Edit**.
3. Make the appropriate changes and click **OK** to confirm or **Cancel** to disregard.

## Elements

1. To view and edit the work elements for the system, click



2. A screen, similar to the one below, will be displayed:



Element	EffectiveDate	Fixed	FreeForm
0001 : Admin & Management	01/01/06	true	false
0002 : Cash Procedures	01/01/06	true	false
0003 : Checkout	01/01/06	true	false
0004 : Grocery	01/01/06	true	false
0005 : Frozen	01/01/06	true	false
0006 : Dairy	01/01/06	true	false
0007 : Bread	01/01/06	true	false
0008 : Produce	01/01/06	true	false
0009 : Stationary/News	01/01/06	true	false
0010 : General Non-Food	01/01/06	true	false
0011 : Confectionery	01/01/06	true	false
0012 : Cigarettes & Tobacco	01/01/06	true	false
0013 : Meat	01/01/06	true	false
0014 : Waste Packaging	01/01/06	true	false
0015 : POS	01/01/06	true	false
0016 : Equipment Maintenance	01/01/06	true	false
0017 : Waste Product	01/01/06	true	false
0018 : Stock Control	01/01/06	true	false
0019 : Cleaning	01/01/06	true	false
0020 : Stocktake	01/01/06	false	true

### Elements window

## Finding an Element

To locate an element, on any of the pages, you can use the **Find** box, in the top right hand corner of the screen.

**Note:** This Find box is case sensitive. For example, if you are trying to find the word Confectionary, and you search for the Confectionary, the correct result will **not** be displayed.

1. Type in the required word and click **Go**.
2. Any results will be displayed.
3. Delete the word and click **Go** again, to return to the full list of elements.

## Add an Element

1. To add an element to the system, click **Edit Master List** at the bottom of the page.
2. A list of all of the Work Elements will be displayed.
3. Click **Add New**, at the bottom of the page.

**Note:** It is advisable to begin each code number with leading 0's for example, Instead of 20, write 0020. This will ensure the list is displayed in numerical order on the main element page.

4. On each line, type in the relevant **Code**, **Name** and any **Notes**.
5. See the **Import** section below for further information on importing the element data into the system.
6. Once complete, click **OK**, at the bottom of the screen to confirm the changes or **Cancel** to disregard them.

## Import

This function allows you to import data from a Microsoft Excel spreadsheet, into the system.

1. To Import a list of elements, ensure that you have clicked on the **Edit Master List**.
2. Click **Add New**.
3. Click **Import from File**.
4. A screen, similar to that below, will be displayed:

Element	Sheet Name	Column	Start Row
Code			
Name			
Notes			
Date			
Value			

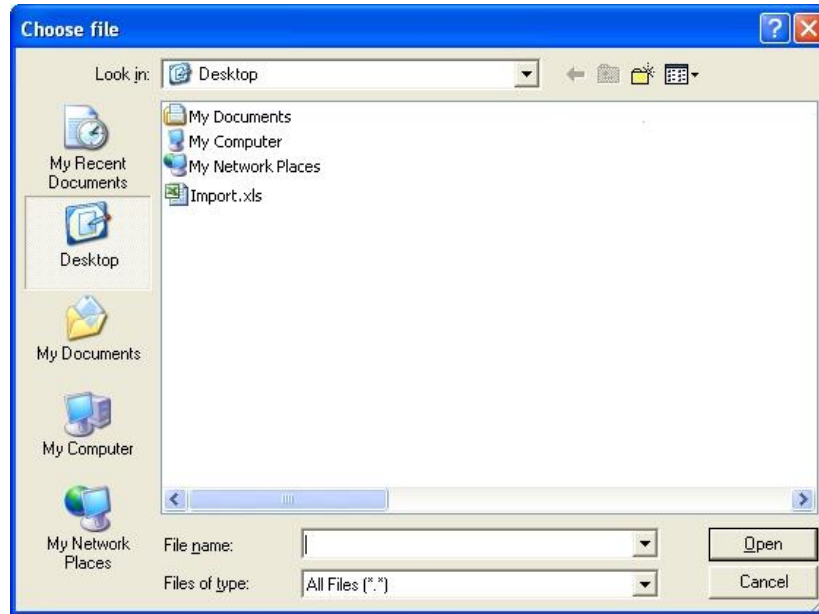
Excel File

Location

### Import window

5. Enter the **Sheet Name**, from the Excel Spreadsheet, for each of the elements.
6. Enter the **Column**, from the Excel Spreadsheet, for each of the elements.

7. Enter the **Start Row**, from the Excel Spreadsheet, for each of the elements.
8. Either type in the location for the Excel Spreadsheet or click **Browse**.



#### Choose File window

9. Once the correct file is located, select it and click **Open**.
10. When all of the information is completed and the Import file has been located, click **Import** at the bottom of the screen.
11. Once the Import is complete, a message will be displayed stating the **Import completed successfully**.
12. Click **OK** to return to the previous screen.

#### Searching for an Existing Element in the Master List

The **Element Master** list also contains a **Search** box in the top right hand corner of the screen. It will look similar to that below:



#### Search on Column window

This **Search** box allows you to search on 4 columns:

- Code
  - ID
  - Name
  - Notes
1. Select the appropriate column from the list.
  2. Type the relevant word, into the **Search** box.
  3. Click **Search**.
  4. The results will be displayed in the main screen.
  5. Click **Show all** to display all of the elements again.

## Edit an Element

1. To edit an existing element, click **Edit Master List**.
2. Change the text for the appropriate element.
3. To confirm the changes, click **OK** at the bottom of the screen or **Cancel** to disregard any changes.

## Delete an Element

1. To delete an element from the list, click **Edit Master List**.

**Note:** You are only able to delete elements on the page currently being displayed. Repeat the process below on each applicable page.

2. Click in the Delete tick box, next to each of the elements you want to remove on the page.
3. Click **Apply**, at the bottom of the screen.
4. You will be asked **Are you sure you want to delete the selected elements?** Click on **OK** to confirm or **Cancel**.

## Element Links

### Add an Element Link

1. To add an Element Link to an element, click **Element Links**, at the bottom of the screen.
2. A screen, similar to that below, will be displayed:

The screenshot shows the 'Edit item' window for '0021 : Household Appliances'. The window has a header with 'Torexretail Administrator' and 'Week 1 : 01 January 2007'. The main area is divided into 'Selected' and 'Available' sections. The 'Selected' section is empty, showing 'no items'. The 'Available' section lists various groups, including 'Whole Store : Whole Store' and several product categories like '0001 : Grocery', '0002 : Produce', '0003 : Frozen', '0004 : Bread', '0005 : Dairy', '0006 : Stationary/News', '0007 : General Non-Food', and '0008 : Confectionery'. There are buttons for '<< Add', 'Remove >>', 'Move Up', and 'Move Down' between the sections. At the bottom of the window are 'OK' and 'Cancel' buttons.

Element Links window



- 
3. Click relevant Group on the right hand side of the screen and then click << **Add**.
  4. The relevant Group will be moved to the left hand side of the screen.

---

**Note:** Selecting **Whole Store** will move **all** of the Groups from the right hand side of the screen to the left.

---

5. To confirm the changes, click **OK** at the bottom of the screen or **Cancel** to disregard any changes.

### **Remove an Element Link**

1. To remove an Element Link to an element, click **Element Links**, at the bottom of the screen.
2. Click relevant Group on the left hand side of the screen and then click **Remove >>**.
3. The relevant Group will be moved to the right hand side of the screen.

---

**Note:** Selecting **Whole Store** will move all of the Groups from the left hand side of the screen to the right.

---

4. To confirm the changes, click **OK** at the bottom of the screen or **Cancel** to disregard any changes.


### **Move Element Links**

1. To change the order of an Element Link, click **Element Links**, at the bottom of the screen.
2. Click relevant Group, on the left hand side of the screen and then click **Move Up** or **Move Down** to change the order.
3. To confirm the changes, click **OK** at the bottom of the screen or **Cancel** to disregard any changes.

## **Print Page**

1. Clicking **Print Page** will bring up a standard print dialog box, asking which printer you want to send the page too.
2. Select the appropriate Printer and then click **OK**.
3. A list of all of the elements on the selected page will be printed. The store name and number will be displayed at the top of the printed page.
4. The printout will look similar to that below:

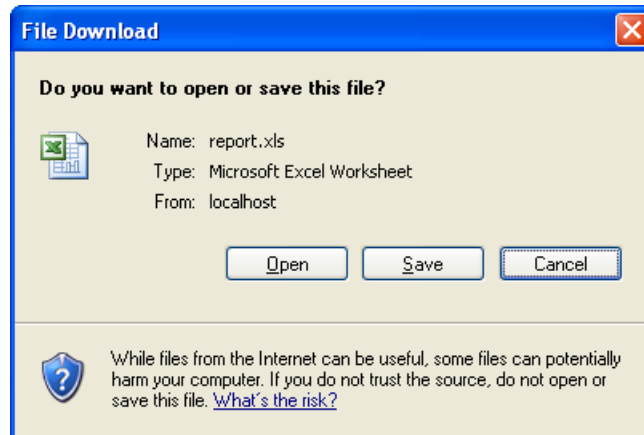
1229 : Birmingham Page 1 of 1

Element 	EffectiveDate	Fixed	FreeForm
0001 : Admin & Management	01/01/06	true	false
0002 : Cash Procedures	01/01/06	true	false
0003 : Checkout	01/01/06	true	false
0004 : Grocery	01/01/06	true	false
0005 : Frozen	01/01/06	true	false
0006 : Dairy	01/01/06	true	false
0007 : Bread	01/01/06	true	false
0008 : Produce	01/01/06	true	false
0009 : Stationary/News	01/01/06	true	false
0010 : General Non-Food	01/01/06	true	false
0011 : Confectionery	01/01/06	true	false
0012 : Cigarettes & Tobacco	01/01/06	true	false
0013 : Meat	01/01/06	true	false
0014 : Waste Packaging	01/01/06	true	false
0015 : POS	01/01/06	true	false
0016 : Equipment Maintenance	01/01/06	true	false
0017 : Waste Product	01/01/06	true	false
0018 : Stock Control	01/01/06	true	false
0019 : Cleaning	01/01/06	true	false
0020 : Stocktake	01/01/06	false	true

Print window

## Create Report

1. To export all of the information, for each element, into an Excel spreadsheet, click **Create Report**.
2. You will be asked if you want to **Open**, **Save** or **Cancel** the report.



File Download window

3. Click **Cancel** to stop the report from being created.
4. Click **Save** to store the report on your computer, to be viewed later.
5. Click **Open** to have the report open directly into Microsoft Excel.
6. The report will look similar to that below:

	A	B	C	D	E	F	G	H
1		<b>Work Elements Report</b>	<b>Run Date: 03/01/07</b>				<b>Page 1</b>	
2								
3		<b>Work Element</b>	<b>Effective Date</b>	<b>SCRIPT</b>	<b>SMV</b>	<b>Driver</b>	<b>Frequency</b>	
4		0001 : Admin & Management	01/01/06		514	No Driver	6 : Once Per Day	
5		0011 : Confectionery	01/01/06		0.0550	Items	5 : Once Per Week	
6		0009 : Stationary/News	01/01/06		0.17	Items	5 : Once Per Week	
7		0002 : Cash Procedures	01/01/06		220	No Driver	6 : Once Per Day	
8		0007 : Bread	01/01/06		0.05	Items	5 : Once Per Week	
9		0003 : Checkout	01/01/06		0.83	Customers	5 : Once Per Week	
10		0014 : Waste Packaging	01/01/06		157.20	No Driver	6 : Once Per Day	
11		0015 : POS	01/01/06		99	No Driver	6 : Once Per Day	
12		0008 : Produce	01/01/06		0.15	Items	5 : Once Per Week	
13		0005 : Frozen	01/01/06		0.5120	Items	5 : Once Per Week	
14		0004 : Grocery	01/01/06		0.30	Items	5 : Once Per Week	
15		0013 : Meat	01/01/06		2.0250	Items	5 : Once Per Week	
16		0006 : Dairy	01/01/06		0.20	Items	5 : Once Per Week	
17		0012 : Cigarettes & Tobacco	01/01/06		0.14	Items	5 : Once Per Week	
18		0016 : Equipment Maintenance	01/01/06		108	No Driver	6 : Once Per Day	
19		0017 : Waste Product	01/01/06		165	No Driver	6 : Once Per Day	
20		0019 : Cleaning	01/01/06		120	No Driver	6 : Once Per Day	
21		0018 : Stock Control	01/01/06		130	No Driver	6 : Once Per Day	
22		0020 : Stocktake	01/01/06	\$if(store params.Stocktake <1,0,3226.80)/60;				
23								

### Create Report window

## Add an Item to the Element

1. To add an item to the selected element, click **Edit**.
2. Click **New**.
3. A screen, similar to that below, will be displayed:

**Torexretail**
Administrator  
Week 3 : 15 January 2007

Log off

### New item

Element

0003 : Checkout

EffectiveDate

15/01/2007 ...

Fixed

☐

FreeForm

☐

Value

0

Driver

Sales

Frequency

Please Select...  
Edit list...

Key

OK

Cancel

**Torexretail**

### New Item window

4. Enter all of the applicable information and click **OK** to save your changes or **Cancel** to disregard.

## Frequency List

1. Clicking **Edit List...** link, will display a screen, similar to that below:

GROUPNAME	SECTIONNAME	ID	VALUE
FCSDESC	STORE PARAMETERS	1	1 : Default
FCSDESC	STORE PARAMETERS	3	2 : AIP
FCSDESC	STORE PARAMETERS	4	3 : ATV
FCSDESC	STORE PARAMETERS	6	4 : LPS
FCSDESC	STORE PARAMETERS	5	5 : Once Per Week
FCSDESC	STORE PARAMETERS	7	6 : Once Per Day

### Frequency List window

#### Add a Frequency

1. To add a frequency, click **New**.
2. Enter an **ID** and **Value**.
3. Click **OK** to save and continue or **Cancel** to disregard.

#### Edit a Frequency

1. To edit a frequency, select an applicable one from the list and click **Edit**.
2. Make any changes and click **OK** to save and continue or **Cancel** to disregard.

#### Delete a Frequency

1. To delete a frequency, click applicable line and click **Delete**.
2. You will be asked Are you **sure you want to delete this item?** Click **Yes** to confirm or **No** to cancel.

## Edit an Item

1. To edit an item, select an element and click **Edit**.
2. Select the applicable Item and click **Edit**.
3. Make any changes and when ready, click **OK** to save your changes or **Cancel** to disregard.

## Delete an Item

1. To delete an item, select an element and click **Edit**.
2. Select the applicable item and click **Delete**.
3. You will be asked **Are you sure you want to delete this item?** Click on **Yes** to confirm or **No** to disregard.

## Store Parameters



### Store Parameters

Create or edit store specific rules

1. To view the Store Parameters, click
2. A screen, similar to that below, will be displayed:

**Torexretail**
Administrator
Week 51 : 14 January 2007
Store Parameters
Home
Log off

Select item
Find
Go

FilesetId	StoreParameter	EffectiveDate	Value
Global	001 : Number of Cash Desks		0.0
Global	002 : Number of Entertainment Desks		0.0
Global	003 : Entertainment is Part of Cash Desk		0.0
Global	004 : Number of Entrances		0.0
Global	005 : Number of SalesFloors		0.0
Global	006 : SalesFloor Area		0.0
Global	007 : NonEntItems		0.0
Global	008 : EntItems		0.0
Global	009 : Lift to Stockroom		0.0
Global	010 : Difficulty Factor		0.0
Global	011 : Number of DC Deliveries		0.0
Global	012 : Total Trading Hours		0.0
Global	013 : Total Operating Hours		0.0
Global	014 : Template Type		0.0
Global	015 : Once Per Week		0.0
Global	016 : Cluster		0.0
Global	017 : OOH Fill Percent		0.0
Global	018 : Clothing Band Hours		0.0
Global	019 : Contracted Hours		0.0
Global	020 : Base Hours		0.0

001-020
021-034

Edit Master List
Edit Store Groups
Edit

Store Parameters window

## Finding a Parameter

1. To locate a Parameter, on any of the pages, you can use the **Find** box, in the top right hand corner of the screen.

**Note:** This **Find** box is case sensitive. For example, if you are trying to find the word Confectionary and you search for the word confectionary, the correct result will not be displayed.

2. Type in the required word and click **Go**.
3. Any results will be displayed.
4. Delete the word and click **Go** again, to return to the full list of elements.

## Add a Parameter

1. To add a parameter to the system, click **Edit Master List** at the bottom of the page.
2. A list of all of the parameters will be displayed.

**Torexretail** Administrator Week 3 : 15 January 2007 [Log off](#)

**Add New Store Parameters**

Code	Name	Notes

**Torexretail**

### Add a Parameter window

3. Click **Add New**, at the bottom of the page.

**Note:** It is advisable to begin each code number with leading 0's for example, Instead of 20, write 0020. This will ensure the list is displayed in numerical order on the main element page.

4. On each line, type in the relevant **Code**, **Name** and any **Notes**.
5. See the **Import** section below for further information on importing the element data into the system.
6. Once complete, click **OK**, at the bottom of the screen to confirm the changes or **Cancel** to disregard them.

### Import

1. This function allows you to import data from a Microsoft Excel spreadsheet, into the system.
2. To Import a list of parameters, ensure that you have clicked on the **Edit Master List**.
3. Click **Add New**.
4. Click **Import from File**.
5. A screen, similar to that below, will be displayed:

## Import Store Parameters from Excel File

Store Parameter	Sheet Name	Column	Start Row
Code	<input type="text"/>	<input type="text"/>	<input type="text"/>
Name	<input type="text"/>	<input type="text"/>	<input type="text"/>
Notes	<input type="text"/>	<input type="text"/>	<input type="text"/>

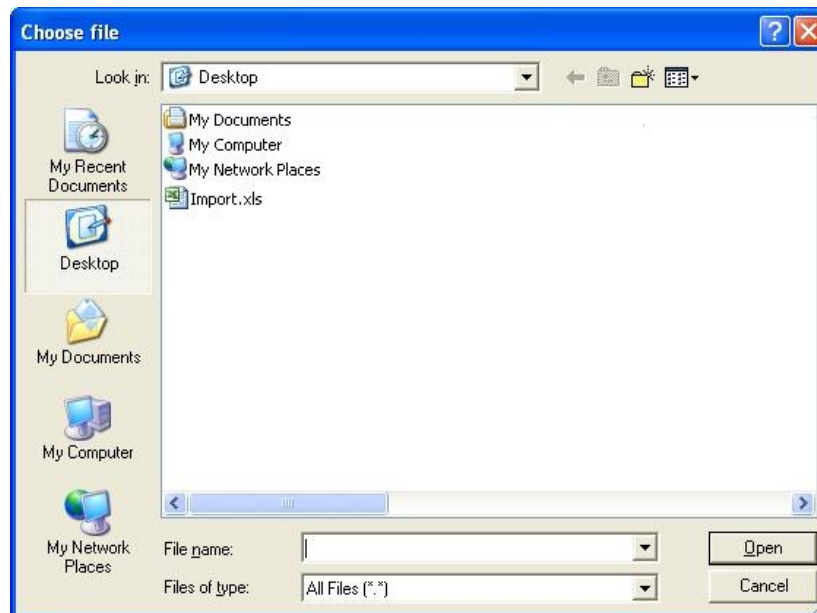
  

Excel File
Location <input type="text"/> <input data-bbox="1084 422 1149 443" type="button" value="Browse..."/>

## Import Store Parameters window

6. Enter the **Sheet Name**, from the Excel Spreadsheet, for each of the elements.
7. Enter the **Column**, from the Excel Spreadsheet, for each of the elements.
8. Enter the **Start Row**, from the Excel Spreadsheet, for each of the elements.
9. Either type in the location for the Excel Spreadsheet or click **Browse**.



## Choose File window

10. Once the correct file is located, select it and click **Open**.

- 
11. When all of the information is completed and the Import file has been located, click **Import** at the bottom of the screen.
  12. Once the Import is complete, a message will be displayed stating the **Import completed successfully**.
  13. Click **OK** to return to the previous screen.

### Searching for an Existing Parameter in the Master List

The **Parameter Master** list also contains a **Search** box in the top right hand corner of the screen. It will look similar to that below:



#### Search on Column window

This **Search** box allows you to search on 4 columns:

- Code
  - ID
  - Name
  - Notes
1. Select the appropriate column from the list.
  2. Type the relevant word, into the **Search** box.
  3. Click **Search**.
  4. The results will be displayed in the main screen.
  5. Click **Show all** to display all of the parameters again.

### Edit a Parameter

1. To edit an existing parameter, click **Edit Master List**.
2. Change the text for the appropriate parameter.
3. To confirm the changes, click **OK** at the bottom of the screen or **Cancel** to disregard any changes.

### Delete a Parameter

1. To delete a parameter from the list, click **Edit Master List**.

---

**Note:** You are only able to delete parameters on the page currently being displayed. Repeat the process below on each applicable page.

---

2. Click in the **Delete** tick box, next to each of the elements you want to remove on the page.
3. Click **Apply**, at the bottom of the screen.
4. You will be asked **Are you sure you want to delete the selected elements?** Click on **OK** to confirm or **Cancel**.



---


## Store Groups

1. To view the Store Groups, click **Edit Store Groups**.

### Add a Store Group

1. To add a Store Group, click **New**.
2. Type in the relevant information and click **OK** to save and continue or **Cancel** to disregard.

### Edit a Store Group

1. To edit a Store Group, click  icon, to the left of the applicable group.
2. Change the relevant information and click **OK** to save and continue or **Cancel** to disregard.

### Delete a Store Group

1. To delete a Store Group, tick the **Delete?** Tick box, to the right of the applicable group.
2. Click **OK**.
3. You will be asked **Are you sure you want to delete the selected items?** Click on **OK** to confirm or **Cancel** to disregard.

## Items

1. To view the items, select an applicable Store Parameter from the list and click **Edit**.
2. Select the applicable store from the list and click **Edit**.

### Add an Item

1. To add an Item, click **New**.
2. Type in the relevant information and click **OK** to save and continue or **Cancel** to disregard.

### Edit an Item

1. To edit an Item, click **Edit**.
2. Change the relevant information and click **OK** to save and continue or **Cancel** to disregard.

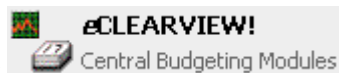
### Delete an Item

1. To delete an Item, select the applicable item in the list and then click **Delete**.
2. You will be asked **Are you sure you want to delete the selected items?** Click on **Yes** to confirm or **No** to disregard.



## eClearview!

1. To access the eClearview module, click



## KPI Report Library

The KPI Report Library operates in the same way as the Report Library, found in the KPI section of the system. The only difference is that you must choose your Forecast, before running the report (see the screen below).

 The screenshot shows the "KPI Report Library" window in the "Torexretail" application. The window has a dark blue header bar with the "Torexretail" logo on the left, the user role "Administrator" and the date "Week 3 : 15 January 2007" in the center, and "Home" and "Log off" buttons on the right. Below the header is a "Select forecast" dropdown menu with a "Please select..." prompt. The main area contains a table with the following columns: "Name", "Owner", "Private", and "Create date". There are two rows of data: "default" (checked for private, created 03-Aug-2005) and "Store Performance Report" (unchecked for private, created 26-May-2006). At the bottom of the table are buttons for "Display", "Edit", "New", "Delete", and "Copy". The "Torexretail" logo is also visible in the bottom right corner of the window.
 

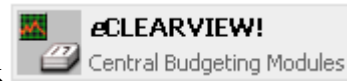
Name	Owner	Private	Create date
<input type="radio"/> default	Administrator	<input checked="" type="checkbox"/>	03-Aug-2005
<input type="radio"/> Store Performance Report	Administrator	<input type="checkbox"/>	26-May-2006

### Select Forecast window

1. To access the KPI Report Library, click
2. For more information on how this area of the system operates, see page 7 of this document.



## eClearview!



1. To edit or create a new forecast, click
2. A screen, similar to that below, will be displayed:

The screenshot shows the 'Forecast Administrator' window within the 'Torexretail' application. The window has a dark blue header bar with the 'Torexretail' logo on the left, the user 'Administrator' and date 'Week 7 : 12 February 2007' in the center, and a 'Log off' button on the right. Below the header, the title 'Forecast Administrator' is displayed. The main area contains a table with four columns: 'Name', 'Description', 'Company', and 'Date'. There are five rows of data, each with a radio button in the 'Name' column. At the bottom of the window, there is a toolbar with buttons for 'New', 'Edit', 'Delete', 'Copy', a dropdown menu labeled '-- Select View --', and buttons for 'Batches', 'Reporting', and 'Home'. The 'Torexretail' logo is also present in the bottom right corner of the window frame.

Name	Description	Company	Date
<input type="radio"/> Enterprise 2006		Enterprise	2006 1
<input type="radio"/> Enterprise 2007		Enterprise	2007 1
<input type="radio"/> Birmingham 2007		1229 : Birmingham	2007
<input type="radio"/> Birmingham Q1		1229 : Birmingham	2007 1
<input type="radio"/> Coventry Q1		1002 : Coventry	2007 1

**Forecast Administrator window**

3. This screen displays a summary of each forecast, including the **Name**, **Description** (Notes), **Company** level selected and the **Date**, which was selected in the forecast.

## Create a New Forecast

1. To create a new forecast, click **New**, at the bottom of the screen.
2. A screen, similar to that below, will be displayed:

**Torexretail Administrator**  
Week 45 : 03 December 2006 Log off

**New item**

Name:

Notes:

UserId:  ReadAccess:  WriteAccess:

Icon:

ElementLevel: ☐

Status:

Code:  find

- Enterprise
  - 0304 : Bognor Regis
  - 0343 : Kingston
  - 0445 : Uckfield
  - 1229 : Birmingham
  - 1454 : Witney
  - 0765 : Cheltenham

DateRange:

- 2006 Period 1
  - Week 1 29/01/06
  - Week 2 05/02/06
  - Week 3 12/02/06
  - Week 4 19/02/06
- 2006 Period 2
  - Week 5 26/02/06
  - Week 6 05/03/06

#### New Item window

1. Enter a name for the forecast in the **Name** field, at the top of the screen.
2. Any additional information about the forecast can be entered in the **Notes** field.
3. The next three fields, define the permissions to interact with the forecast for example,
  - **UserId** – Who created the forecast
  - **ReadAccess** – Which level of user can view this forecast
  - **WriteAccess** – Which level of user can edit this forecast
4. Ticking the **ElementLevel** box, will allow detailed information to be displayed in the forecast.

---

**Note:** Viewing a forecast, which has the ElementLevel box ticked, may take some time to process, due to the amount of information to display.

---

5. Under the heading **Code**, click level that you want to be included in this forecast. For example, if you wanted all of the stores to be included, you would click main company name at the top of the list. If you wanted an individual store to be included, you would click on its name in the list. When you click name, it will become highlighted.
6. There is a search box, just to the right hand side of the **Code** box. To locate a name, type it in the blank field and click **Find**, to locate the first instance of the name in the list. Click **Find** again, to show the second instance in the list and so on.
7. In the **DateRange** field, select the relevant dates for the forecast. For example, Selecting 2006, would select all of the months and weeks in that year. Selecting Week 2 would only select that week. Clicking relevant date will highlight it.
8. Once you have confirmed that all of the information is correct, click **OK** at the bottom of the screen.

9. You will be returned to the main forecast screen, with the newly created forecast in the list.

## Edit a Forecast

1. To edit an existing forecast, click circular button next to the relevant forecast. The row should become highlighted.
2. Click **Edit**, at the bottom of the screen.
3. All of the forecast information will be displayed. Edit the information, as appropriate, and then click **OK** to save and return to the main forecast screen.

## Delete a Forecast

1. To delete an existing forecast, click circular button, next to the relevant forecast. The row should become highlighted.
2. Click **Delete**, at the bottom of the screen.
3. A preview of this forecast will be displayed. If you are sure you want to delete this forecast, click **Yes**. The system will delete the forecast and you will be returned to the previous screen.
4. Otherwise, click **No** to return you to the previous screen.

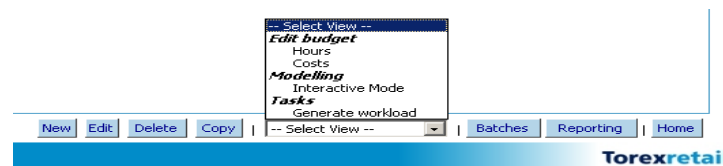
## Copy a Forecast

1. To copy an existing forecast, click circular button, next to the relevant forecast. The row should become highlighted.
2. Click **Copy**, at the bottom of the screen.
3. A duplicate of the selected forecast will now be created, with 'Copy of' in front of the forecast title. For example, If the original forecast was called '**All Stores**', copying it would create a second forecast called '**Copy of All Stores**'.
4. You can now edit the copied forecast (See **Edit a Forecast**) and rename or edit it.

## Interactive Mode

To access and edit the **Interactive Mode** information to be applied to a Forecast:

1. Select the appropriate Forecast.
2. Click drop down menu at the bottom of the screen and select **Interactive Mode**.



### Interactive Mode window

- Adjust the relevant information and click **Recalc** at the bottom of the screen. This will apply the updated information to the Forecast.

**Torexretail** Administrator Week 44 : 26 November 2006 Log off

### Report 1

Summary ALLOWEDHOURS LCP PI STANDARDHOURS Flex Base standardCost allowedCost absenceHours absenceCost absencePC trainingHours trainingCost trainingPC premiumCost Items

Summary	
ALLOWEDHOURS	2,498.25
PI	100.00
allowedCost	16,047.16
absenceHours	0.00
Items	88,996
Sales	391,731

**Torexretail**

#### Report window

- Click **OK** to confirm the changes and return to the Forecast screen or **Cancel** to disregard any changes.

---

**Note:** Recalculating the **Interactive Mode** information may take some time, depending on the size of the selected Forecast. It may be quicker to choose one of the smaller **Budget Hours** or **Budget Cost** Modes, if the relevant information is contained there.

---

## Budget Hours Mode

To access and edit the **Budget Hours Mode** information to be applied to a Forecast:

- Select the appropriate Forecast.
- Click drop down menu at the bottom of the screen and select **Budget Hours Mode**.

-- Select View --  
 Edit budget  
 Hours  
 Costs  
 Modelling  
 Interactive Mode  
 Tasks  
 Generate workload

New Edit Delete Copy | -- Select View -- | Batches Reporting | Home

**Torexretail**

#### Budget Hours Mode window

- A simplified view of the **Interactive Mode** will be displayed.

**Torexretail** Administrator Week 44 : 26 November 2006 Log off

### Report 1 - Budget Hours Mode

Summary	ALLOWEDHOURS	PI	STANDARDHOURS
<b>Summary</b>			
ALLOWEDHOURS	2,498.25		
PI	100.00		
STANDARDHOURS	2,498.25		
MINHOURS	0.00		
MAXHOURS	0.00		
FLEXBASE	794.00		
ITEMS	88,996		
SALES	391,731		
absenceHours	0.00		
absencePC	0.00		
trainingHours	0.00		
trainingPC	0.00		

Recalc | OK | Cancel | Apply

**Torexretail**

#### Budget Hours Mode Report window

- Adjust the relevant information and click **Recalc** at the bottom of the screen. This will apply the updated information to the Forecast.
- Click **OK** to confirm the changes and return to the Forecast screen or **Cancel** to disregard any changes.

## Budget Cost Mode

- Select the appropriate Forecast.
- Click drop down menu at the bottom of the screen and select **Budget Cost Mode**.

-- Select View --

**Edit budget**

Hours

Costs

**Modelling**

Interactive Mode

**Tasks**

Generate workload

New | Edit | Delete | Copy | -- Select View -- | Batches | Reporting | Home

**Torexretail**

#### Budget Cost Mode window

- A simplified view of the **Interactive Mode** will be displayed.



**Torexretail** Administrator Week 44 : 26 November 2006 Log off

### Report 1 - Budget Cost Mode

Summary
LCP

Summary	
LCP	<input type="text" value="4.10"/>
FLEXBASE	794.00
ITEMS	88,996
SALES	391,731
standardCost	16,047.16
allowedCost	<input type="text" value="16,047.16"/>
absenceCost	<input type="text" value="0.00"/>
trainingCost	<input type="text" value="0.00"/>
premiumCost	0.00
additionalCost	<input type="text" value="0.00"/>

Recalc | OK | Cancel | Apply

**Torexretail**

#### Budget Cost Mode Report window

- Adjust the relevant information and click **Recalc** at the bottom of the screen. This will apply the updated information to the Forecast.
- Click **OK** to confirm the changes and return to the Forecast screen or **Cancel** to disregard any changes.

## Generate Workload

- Select the appropriate Forecast.
- Click drop down menu at the bottom of the screen and select **Generate Workload**.

#### Generate Workload window

- The system will automatically generate a workload for the selected forecast. Once it is complete, you will be returned to the Forecast list.

**Note:** The **Generate Workload** process may take some time, depending on the size of the selected Forecast.

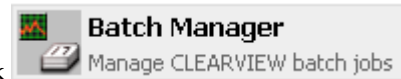
## Batches

- Clicking **Batches**, takes you to the main **Batch Manager** area of the system. For further information on the batches process, see Page 94 of this User Guide.

## Reporting

1. Clicking **Reporting**, takes you to the main **Reports** area of the system. For further information on the reporting process, see Page 7 of this User Guide.

## Batch Manager



1. To access the **Batch Manager**, you should click
2. A screen, similar to that below, will be displayed:

**Batch Forecast Administrator**

There are no saved batch jobs

Completed (25)

Select	Forecast	Description	Requested	Started	Finished	Elapsed time	Run time	Host
<input type="radio"/>	Quarter 4	Apply set values	Wed Nov 29 11:37:31 GMT 2006	Wed Nov 29 11:37:32 GMT 2006	Wed Nov 29 11:37:43 GMT 2006	11.843 sec	11.547 sec	alc-001399
<input type="radio"/>	Quarter 4	Apply set values	Wed Nov 29 11:40:46 GMT 2006	Wed Nov 29 11:40:47 GMT 2006	Wed Nov 29 11:40:50 GMT 2006	3.469 sec	3.219 sec	alc-001399
<input type="radio"/>	Kingston 1	Hours generation	Wed Nov 29 11:41:22 GMT 2006	Wed Nov 29 11:41:27 GMT 2006	Wed Nov 29 11:41:36 GMT 2006	14.094 sec	8.422 sec	alc-001399
<input type="radio"/>	Kingston 1	New batch	Wed Nov 29 11:41:27 GMT 2006	Wed Nov 29 11:41:27 GMT 2006	Wed Nov 29 11:41:37 GMT 2006	10.453 sec	10.328 sec	alc-001399
<input type="radio"/>	Quarter 4	Apply set values	Wed Nov 29 11:42:34 GMT 2006	Wed Nov 29 11:42:35 GMT 2006	Wed Nov 29 11:42:38 GMT 2006	3.359 sec	3.125 sec	alc-001399
<input type="radio"/>	Quarter 4	Apply set values	Wed Nov 29 11:42:47 GMT 2006	Wed Nov 29 11:42:47 GMT 2006	Wed Nov 29 11:42:50 GMT 2006	3.078 sec	2.859 sec	alc-001399
<input type="radio"/>	Quarter 4	Apply set values	Wed Nov 29 11:42:58 GMT 2006	Wed Nov 29 11:42:58 GMT 2006	Wed Nov 29 11:43:01 GMT 2006	3.203 sec	3.047 sec	alc-001399
<input type="radio"/>	Quarter 4	Apply set values	Wed Nov 29 11:43:05 GMT 2006	Wed Nov 29 11:43:05 GMT 2006	Wed Nov 29 11:43:08 GMT 2006	3.515 sec	3.375 sec	alc-001399
<input type="radio"/>	Quarter 4	Apply set values	Wed Nov 29 11:43:30 GMT 2006	Wed Nov 29 11:43:30 GMT 2006	Wed Nov 29 11:43:33 GMT 2006	2.890 sec	2.750 sec	alc-001399
<input type="radio"/>	Quarter 4	Apply set values	Wed Nov 29 11:44:23 GMT 2006	Wed Nov 29 11:44:23 GMT 2006	Wed Nov 29 11:44:27 GMT 2006	3.375 sec	3.235 sec	alc-001399

Batch Forecast Administrator window

## Create a New Batch Job

1. To create a new Batch job, click **New** at the top of the screen.
2. A screen, similar to the one below, will be displayed:

#### Batch Forecast Editor window

3. First, type a relevant name for this job, in the **Name** field at the top of the screen.
4. Select the appropriate **Forecast** from the list.
5. You now need to add the activities to be processed. See below.

### Add a Batch Activity

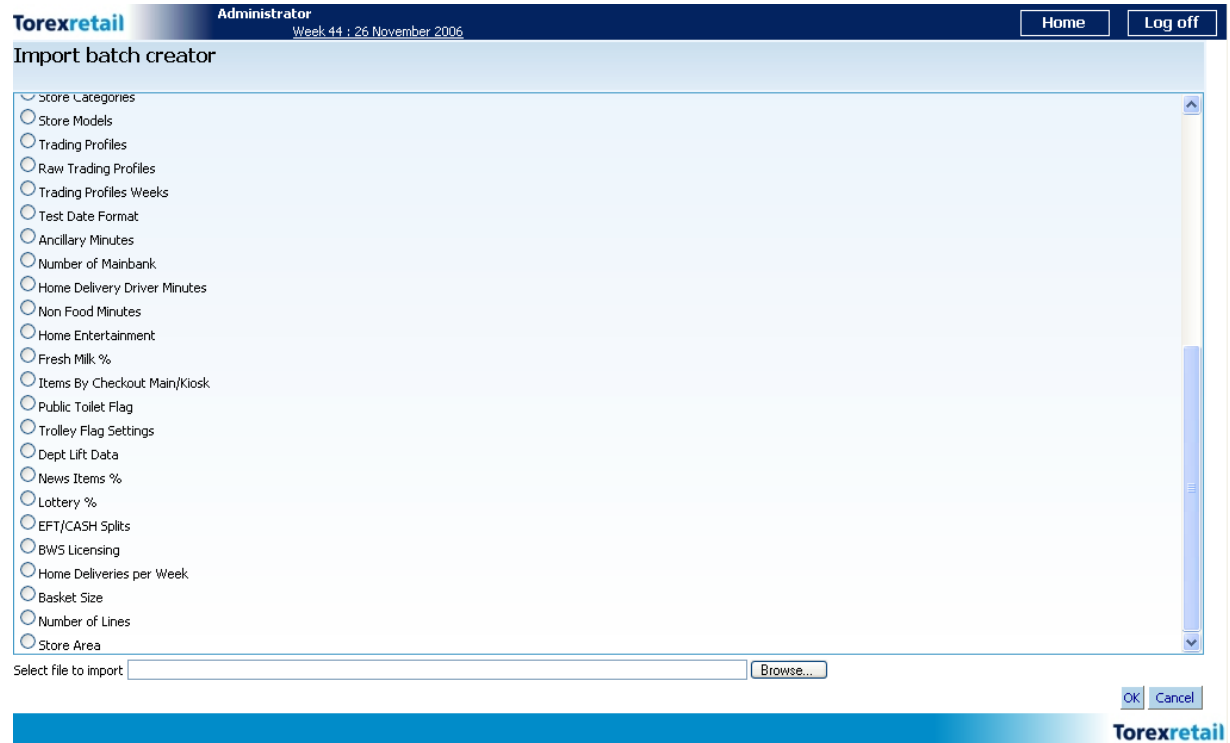
1. To add multiple Activities to the list for processing, repeat each procedure below as many times as required for example, Follow the Import process to add one file and then repeat the process to select another file.

#### Import

1. To add an **Import** Batch Activity to the processing list, select **Import** from the drop down list.

#### Select Import window

2. Click **Add**.
3. A screen, similar to the one below, will be displayed:



#### Import Batch Creator window

4. Select the relevant Import, by clicking in the circular box to the left of the required data.
5. Click **Browse** and the screen below will be displayed.



#### Choose File window

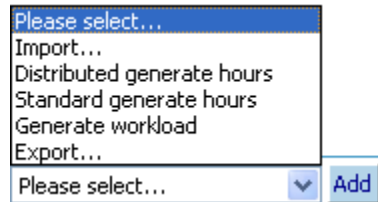
6. Navigate to the location of the relevant Import file. Either click file once and click **Open**, or double click Import file.
7. You will be returned to the Import screen and the location of the file will be displayed in the **Select file to import** field.
8. Once ready, either click **OK** to confirm the choice of Import or the **Cancel** to disregard any selections.
9. You will then be returned to the previous screen.

---

### Distributed Generate Hours

If you have multiple servers setup to process ePerformance data, selecting this option will speed up the processing time by utilizing both servers.

1. To add a **Distributed Generate Hours** Activity to the processing list, select **Distributed Generate Hours** from the drop down list.

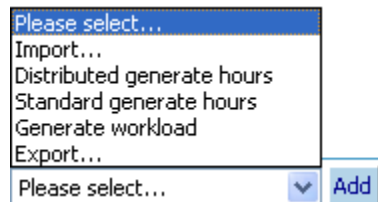


#### Select Import window

2. Click **Add**.
3. A **Distributed Generate Hours** Activity will be added to the list.

### Standard Generate Hours

1. To add a **Standard Generate Hours** Activity to the processing list, select **Standard Generate Hours** from the drop down list.

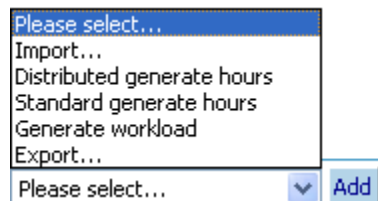


#### Select Import window

2. Click **Add**.
3. A **Standard Generate Hours** Activity will be added to the list.

### Generate Workload

1. To add a **Generate Workload** Activity to the processing list, select **Generate Workload** from the drop down list.



#### Select Import window

2. Click **Add**.
3. A **Generate Workload** Activity will be added to the list.

### Export

1. To add an **Export** Activity to the processing list, select **Export** from the drop down list.

#### Select Import window

2. Click **Add**.
3. A screen, similar to the one below, will be displayed:

OK Cancel

Torexretail

#### Export Batch Creator window

##### Export KPI Report

1. To generate a KPI Report to the default location, **c:\disks** on the server running the system, click in the circular box next to **Export KPI report**.
2. In the **Select Report** list, click required report.
3. Type in the name of the report in the **Filename** field.
4. When ready, click **OK** to add this Activity or **Cancel** to disregard any changes.

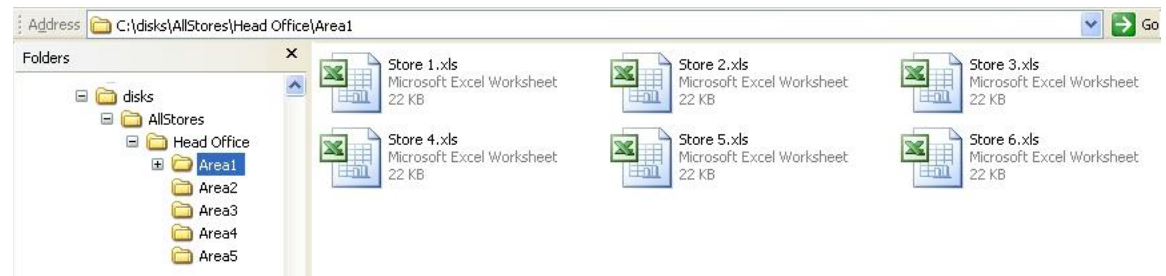
##### Generate Strawman Reports

The Strawman Reports display the same information as the New Summary report. See Page 155 for further information on the content. The main difference is that this produces a report for every Store and Area in the selected Forecast and splits the information by Month, Quarter and Year.

1. To do this, click in the circular box next to **Generate Strawman Reports**.
2. Ticking the box **Comclick output into a single ZIP file**, will create a single file in the default location, in the following name format **Forecast Name.zip**.

3. Ticking the box **Automatically organize files into folders** will allow the system to move the reports into a logical folder structure. This makes it easier to view the reports and locate relevant information. For example,

Below, we have a Forecast called **All Stores**. Within this, we have the **Head Office**. Each **Area** has its own folder under the **Head Office** and then each **Store** is contained in its relevant **Area** folder. If the box hadn't been ticked, all reports would appear in one folder.



**Folder window**

4. Once ready, click **OK** to confirm the changes or **Cancel** to disregard any actions.

### **Generate Element Level Report**

1. This section of the screen will only be displayed if the Forecast has the **Element Level** tick box ticked in the **Forecast Administrator** screen, see Page 88 for further information.
2. Click in the circular box next to **Generate Element Level Report**.
3. In the **Select report** list, choose whether it should be an Excel Report or a CSV file.
4. Type in an appropriate **Filename**.
5. When ready, click **OK**.
6. You will be asked to select the Regions, Divisions and Stores to be included in the report. Select the relevant option and click **Next**.



**Export Options window**

7. You then need to select the Tasks to be displayed. Click relevant options and then click **Next**.

## Element Level Export Options for 1229 2007/08

Select task

☐ 0001 : Till 1☐ 0002 : Till 2☐ 0003 : Floor Manager☐ 0004 : Assistant 1

Select All

De-select All

Invert All

&lt; Back

Next &gt;

Cancel

## Element Level Export Options window

8. Select the appropriate dates from the list and click **Next**.

## Export options for 1229 2007/08

Select date filter

☐ YEAR 2007☐ 2007 QUARTER 1☐ 2007 MONTH 1☐ WEEK 1 01/04/07☐ WEEK 2 08/04/07☐ WEEK 3 15/04/07☐ WEEK 4 22/04/07

Select All

De-select All

Invert All

&lt; Back

Next &gt;

Cancel

## Export Options window

9. You will then be returned to the main screen, where you can add more Activities to be processed.

## Remove a Batch Activity

1. To remove a Batch Activity from the list, click in the circular box to the left of the required activity.
2. Click **Remove** at the bottom of the screen.
3. You will be asked if you **Are sure you want to remove the task?** If you are, click on **OK** or **Cancel**.

## Move a Batch Activity

1. To change the order of the Batch Activities in the list, click in the circular box to the left of the required activity.
2. Either click **Move up** to move the activity up one place or the **Move down** to move the activity down one place.



---

## Edit a Batch Job

1. To edit a Batch Job, click in the circular to the left of the relevant Job.
2. Click **Edit**.
3. You are now able to **Add**, **Remove** or **Move** the Activities in the list.

## Delete a Batch Job

1. Batches will remain at the top of the screen, until they are manually deleted from the system.
2. To delete a Batch Job, click in the circular to the left of the relevant Job.
3. You will be asked **Are you sure you want to delete this batch?** If you are, click **OK**, otherwise, click **Cancel**.

## Run a Batch Job

1. To run a Batch Job, click in the circular box next to the relevant Job.
2. Click **Run**.
3. A screen, similar to that below, will be displayed:

The screenshot shows the 'Processing forecast...' window in the Torexretail Administrator interface. The window has a title bar with 'Torexretail Administrator' and 'Week 44 : 26 November 2006'. There are 'Home' and 'Log off' buttons in the top right. The main content area is titled 'Processing forecast...' and contains a table with the following data:

Generate Workload for Store	
Created by	Administrator
Created batch process	Wed Nov 29 16:59:13 GMT 2006
Total time elapsed	0.610 sec
Started processing	Wed Nov 29 16:59:13 GMT 2006
Total time processing	0.610 sec
Overall progress	<input type="text"/>

A 'Return' button is located at the bottom right of the window.

### Processing Forecast window

4. The screen displays information such as who created the Batch Job, when and how long it has taken to process.
5. This process can be run in the background, so to go back to the main screen, click **Return**.

**Torexretail** Administrator Week 44 : 26 November 2006 Home Log off

### Batch Forecast Administrator

☐ Report 1 ☐ Generate Workload for Store

New Edit Delete Run Forecasts Home

**Running (1)**

Select	Forecast	Description	Requested	Started	Finished	Elapsed time	Run time	Host
<input type="radio"/>	Report 1	Generate Workload for Store	Wed Nov 29 16:59:29 GMT 2006	Wed Nov 29 16:59:29 GMT 2006		1.515 sec	1.437 sec	alc-001399

**Completed (28)**

Select	Forecast	Description	Requested	Started	Finished	Elapsed time	Run time	Host
<input type="radio"/>	Quarter 4	Apply set values	Wed Nov 29 11:37:31 GMT 2006	Wed Nov 29 11:37:32 GMT 2006	Wed Nov 29 11:37:43 GMT 2006	11.843 sec	11.547 sec	alc-001399
<input type="radio"/>	Quarter 4	Apply set values	Wed Nov 29 11:40:46 GMT 2006	Wed Nov 29 11:40:47 GMT 2006	Wed Nov 29 11:40:50 GMT 2006	3.469 sec	3.219 sec	alc-001399
<input type="radio"/>	Kingston 1	Hours generation	Wed Nov 29 11:41:22 GMT 2006	Wed Nov 29 11:41:27 GMT 2006	Wed Nov 29 11:41:36 GMT 2006	14.094 sec	8.422 sec	alc-001399
<input type="radio"/>	Kingston 1	New batch	Wed Nov 29 11:41:27 GMT 2006	Wed Nov 29 11:41:27 GMT 2006	Wed Nov 29 11:41:37 GMT 2006	10.453 sec	10.328 sec	alc-001399
<input type="radio"/>	Quarter 4	Apply set values	Wed Nov 29 11:42:34 GMT 2006	Wed Nov 29 11:42:35 GMT 2006	Wed Nov 29 11:42:38 GMT 2006	3.359 sec	3.125 sec	alc-001399
<input type="radio"/>	Quarter 4	Apply set values	Wed Nov 29 11:42:47 GMT 2006	Wed Nov 29 11:42:47 GMT 2006	Wed Nov 29 11:42:50 GMT 2006	3.078 sec	2.859 sec	alc-001399
<input type="radio"/>	Quarter 4	Apply set values	Wed Nov 29 11:42:58 GMT 2006	Wed Nov 29 11:42:58 GMT 2006	Wed Nov 29 11:43:01 GMT 2006	3.203 sec	3.047 sec	alc-001399

Re-run Save Abort

**Torexretail**

#### Batch Forecast Administrator window

6. A new heading of **Running** has been added to the list (see above). This indicates that a Batch Job is currently being processed.
7. The system will keep refreshing the screen, so that you can see updated information on the process.
8. Once it is finished, it will be moved into the **Completed** list.

## Forecasts

1. Clicking **Forecasts** will return you to main Forecast area of the system. For more information on this area, see Page 88 of this User Guide.

## Completed Batch Jobs

1. Once a Batch job has finished processing, it will be moved to the **Completed** area of the system.

### Re-run Batch Jobs

1. To re-run a Batch Job, click in the circular button, next to the relevant job.
2. Click **Re-run**.

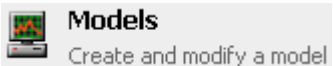
### Save Batch Jobs

1. Saving a Batch job displays it at the top of the screen, so that it can be re-run when required.
2. Click in the circular box next to the relevant Job, in the **Completed** section of the screen.
3. Click **Save** and the Batch Job will be displayed.

### Abort Batch Jobs

- 1. You can only abort a Batch Job, which is currently being processed.
- 2. Click in the circular box, next to the relevant Job and click **Abort** at the bottom of the screen.

## Models



- 1. To view the Models, click
- 2. More information on using the Models screen can be found on page 67.

## Costing



- 1. To view the Costing information, click
- 2. A screen, similar to that below, will be displayed:

**Torexretail**

Administrator  
Week 5 : 29 January 2007

Costing

Log off

Cost Models

Select	Short description	Long description	Comments	Delete ?
<input type="radio"/>	001	Default		

Edit details... | Apply | Cancel | New | Delete | Home

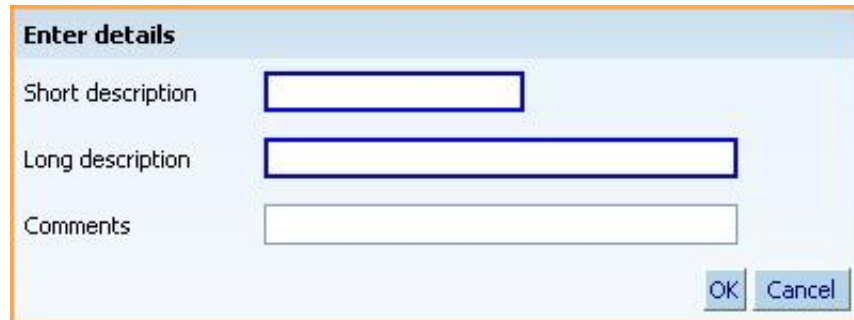
Torexretail

Cost Models window

---

## Add a New Costing Model

1. To add a new costing model, click **New**, at the bottom of the screen.
2. The following window will be displayed:

A screenshot of a software window titled "Enter details". It contains three text input fields: "Short description", "Long description", and "Comments". The "Long description" field is wider than the others. At the bottom right, there are two buttons: "OK" and "Cancel".

**Enter Details window**

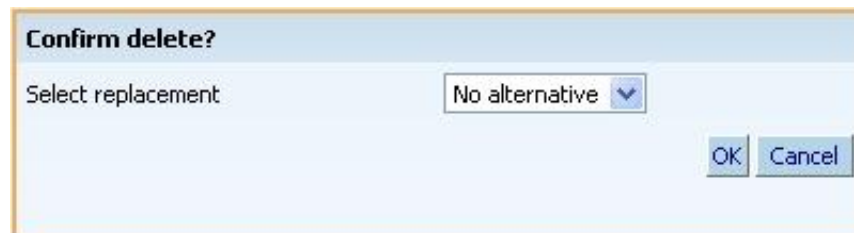
3. Enter the appropriate information and then click **OK** to save and confirm or **Cancel** to disregard.
4. The new model will appear in the list. To enter additional information, click in the **Select** circular button, next the applicable model and click **Edit Details...**
5. Enter all applicable information and click **OK** to save and confirm or **Cancel** to disregard.

## Edit a Costing Model

1. To edit a costing model, click in the **Select** circular button, next to the relevant model.
2. Click **Edit Details...**, at the bottom of the screen.
3. Make any appropriate changes.
4. Either click **OK** to save and confirm or **Cancel** to disregard.

## Delete a Costing Model

1. To delete a costing model, tick the **Delete?** tick box, next the relevant model.
2. Click **Delete**, at the bottom of the screen.
3. The following window will be displayed:

A screenshot of a software window titled "Confirm delete?". It contains a label "Select replacement" followed by a dropdown menu showing "No alternative" with a downward arrow. At the bottom right, there are two buttons: "OK" and "Cancel".

**Confirm Delete window**

4. Select the appropriate replacement and click **OK** to confirm or **Cancel** to disregard.
5. The selected model will be deleted from the list.

## Elements

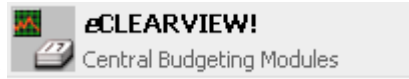


1. To view the Elements, click
2. More information in using the Elements screen can be found on page 73.

## Commodity Group Versions

To access the Commodity Group Version section:

1. Log into the software as usual.



2. Click



3. Then click

## Adding a new Commodity Group Version

To add a new **Commodity Group Version**, follow the steps below:

1. Click **Add New**.
2. A screen, similar to the one below, will be displayed:

### Add New window

3. Enter the Short Desc, Long Desc and Comments, if applicable.
4. Once complete, click on OK to continue or Cancel to return to the previous screen.

See the heading **Copying a Commodity Group Version** below for an alternative way of adding a new **Version**.

---

## Adding Commodity Groups to the Versions

To add **Commodity Groups** to the **Versions**, follow the steps below:

1. Move the cursor over the **Version** you want to add the **Commodity Groups** to. Click on it.

### Edit a Version

(default)

- ☒ 0005 : Commodity Group 1 [info] [copy]
- ☐ 0006 : Commodity Group 2 [info] [copy] [delete]

### Edit a Version window

2. A screen, similar to the one below, will be displayed:  
Error! Objects cannot be created from editing field codes.
3. The Commodity Groups, under the heading Available, will be relevant to your company. Click on an appropriate Commodity Group and click << Add button, to assign the Commodity Group to the Version. This Group will then appear on the left hand side of the screen.
4. If a mistake has been made, select the relevant **Group** on the left hand side of the screen and click **Remove >>** button. This will move the **Group** to the bottom of the main list on the right.
5. To change the order that the **Groups** appear, on either side of the screen, select one and click **Move Up** or **Move Down**.
6. Once all of the relevant **Commodity Groups** have been added, click **OK** to continue. Otherwise, click **Cancel** to return to the previous screen.

## Setting the default Commodity Group Version

To set the default Commodity Group Version:

1. Select the radio button, next to the relevant **Version**, for example,

### Edit a Version

(default)

- ☒ 0005 : Commodity Group 1 [info] [copy]
- ☐ 0006 : Commodity Group 2 [info] [copy] [delete]

### Edit a Version window

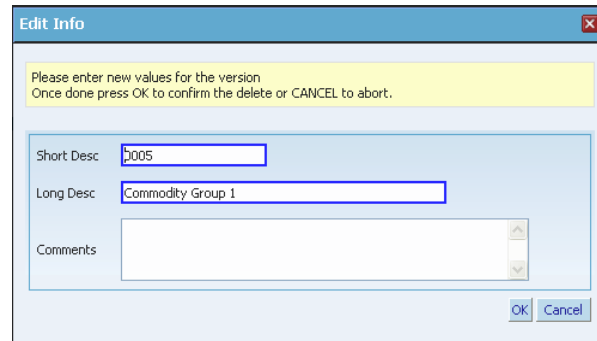
2. As can be seen above, **Commodity Group 1** is now the default and the **Delete** option has been removed. You are unable to delete the default.

---

## Displaying information about the Commodity Group Version

To display and alter information about the **Commodity Group Version**, follow the steps below:

1. Click **Info** option, next to the relevant **Version**. A screen, similar to the one below, will be displayed:



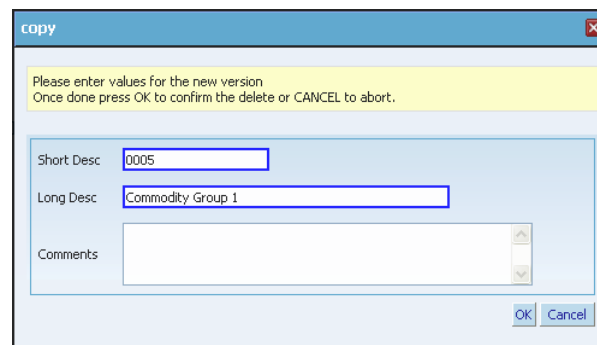
**Edit Info window**

2. From here you can view the information, including the **Comments**.
3. To change any of the details, click in the relevant field and type in the new text.
4. Click on **OK** to confirm the changes or **Cancel**.

## Copying a Commodity Group Version

To base a new **Commodity Group Version** on an existing one, follow the steps below:

1. Click **Copy** option, next to the relevant **Version**. A screen, similar to that shown below, will be displayed:



**Copy window**

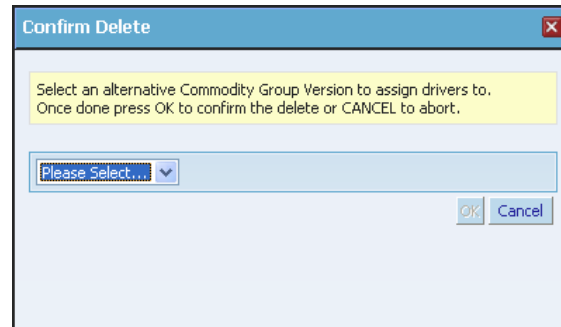
2. Enter a new **Short Desc**, **Long Desc** and any **Comments**, if appropriate.
3. Click on **OK** to confirm or **Cancel** to return to the previous screen.

---

## Deleting a Commodity Group Version

To delete an existing **Commodity Group Version**, follow the steps below:

1. Click **Delete** option, next to the relevant **Version**. A screen, similar to that shown below, will be displayed:



**Confirm Delete window**

2. You will need to select an alternative **Commodity Group Version** from the list, to reassign any relevant **Drivers**.
3. Once chosen, click on **OK** or **Cancel**, to return to the previous screen.

---

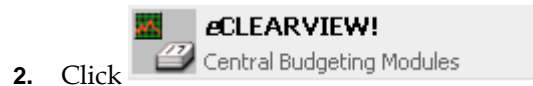
**Note:** You are unable to delete the Default Commodity Group Version. You must first select a new default Version, before the delete option will become active.

---

## Commodity Group Descriptions

To access the new Commodity Group Descriptions section:

1. Log into the software as usual.



2. Click



3. Then click

---

**Note:** It is possible that there may be too many Commodity Groups to display on the screen at once. If this is the case, links to other pages will be displayed in the bottom left of the screen.

---



## Add a New Commodity Group

To add a new **Commodity Group** to the list, follow the steps below:

1. Click **Add New**. A screen, similar to that below, will be displayed:

### Add New Commodity Groups

Short Desc	Long Desc	Comments
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

### Add New Commodity Groups

2. Enter the **Short Desc**, **Long Desc** and **Comments**, if applicable.
3. Add as many **Commodity Groups** as required. Once complete, click **OK** to confirm or the **Cancel**, to return to the previous screen.

## Searching for an Existing Commodity Group Description

To search for a specific **Commodity Group**, follow the steps below:

Search on column	Short Desc ▾	<input type="text"/>	<input type="button" value="Search"/>	<input type="button" value="Show all"/>
------------------	--------------	----------------------	---------------------------------------	---

### Search on Column window

1. In the **Search on column** drop down menu, select the column you want to search for example, **Short Desc**.
2. Type your search criteria into the field and click **Search**. The results will be displayed in the main screen, below.
3. To view all of the **Commodity Groups** again, click **Show all**.

## Deleting a Commodity Group Description

To delete one or more **Commodity Group** from the list, follow the steps below:

Commodity Groups			
delete?	Id ↑	Short Desc	Long Desc
	0	Whole St	Whole Store
<input type="checkbox"/>	1	0001	PHOTOGRAPHIC
<input type="checkbox"/>	2	0002	PORTABLE AUDIO

### Commodity Groups window

1. Tick the box, in the column **delete?** for any **Commodity Groups** to be deleted.
2. Click **Apply**, at the bottom of the screen.
3. A message will be displayed which asks **Are you sure you want to delete the selected Commodity Groups?** If you are, click on **OK**, which will confirm the deletion. Otherwise, click on **Cancel** to return to the previous screen.

## Driver Assignments

This screen allows you to assign the relevant **Commodity Group Version** to a **Driver**. For each **Driver** there are 2 hierarchy settings:

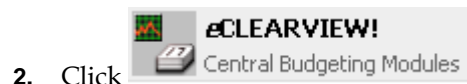
- Budget – contains high level summary information and is used for calculating budgets.
- Interface – typically, contains more detailed lower level hierarchy information. This is used when data is imported or displayed within the User Interface.

It is important to assign the correct **Commodity Group Version** to the relevant option for example, **Budget** or **Interface**. The **Budget** option is optimized, so that only summary information is used. This ensures faster processing of information within the system. The **Interface** option, typically, contains multiple level hierarchies, which house more detailed information than the **Budget** option. Although this additional information can allow for better analysis of data, it can add additional processing time to the system, slowing down its performance.

## Accessing the Driver Assignments

To access the **Driver Assignments** section:

1. Log into the software as usual.



## Assigning a Commodity Group Version to a Driver

To assign a **Commodity Group Version** to a **Driver**, follow the steps below:

Driver Assignment				
	DriverCode	Name	Budget	Interface
	0	Sales	0005 : Commodity Group 1 ▼	0005 : Commodity Group 1 ▼
	1	Items	0005 : Commodity Group 1 ▼	0005 : Commodity Group 1 ▼

### Driver Assignment window

1. Click drop down menu next to the relevant **Driver**, under the headings **Budget** and **Interface**.
2. Select the appropriate **Commodity Group Version** for each and click **Apply**, at the bottom of the screen, for the settings to take effect.

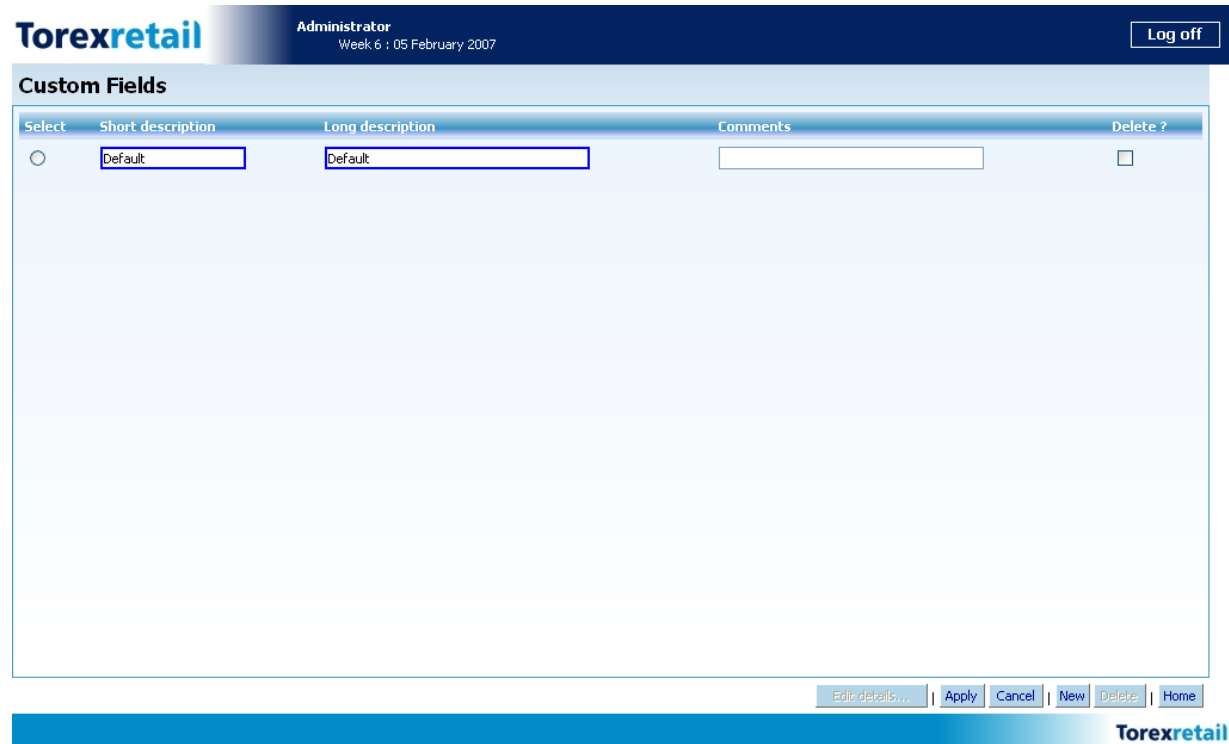
**Note:** It is possible that there may be too many Drivers to display on the screen at once. If this is the case, links to other pages will be displayed in the bottom left of the screen.

## Custom Fields

1. To view the Custom Fields, which can be created for use on the KPI reports, click



2. A screen, similar to that below, will be displayed:



Custom Fields window

### Add a New Custom Field

1. To add a new custom field, click **New**.
2. Enter the relevant information and click **OK** to save and confirm or **Cancel** to disregard.
3. To add a default value to the field, click **Edit details...**

#### Create a New Default Value

1. To create a new default value, click **New**, at the bottom of the screen.
2. Enter a **Value** and click **OK** to save or **Cancel** to disregard.

#### Edit a Default Value

1. To edit a default value, click **[edit]** link, next to the relevant value.
2. Make any relevant changes and click **OK** to confirm or **Cancel** to disregard.

#### Delete a Default Value

1. To delete a default value, click **[delete]** link, next to the relevant value.
2. You will be asked **Are you sure you want to delete this value?** Click **OK** to confirm or **Cancel** to disregard.

---

### Assign a Default Value

1. To assign a default value, click **[Assign]** link.
2. See Page 174 for further information about selecting a store(s).

### Edit a Custom Field

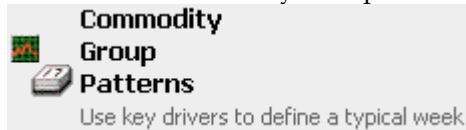
1. To edit a custom field, click select circular button, next to the relevant field.
2. Click **Edit details....**
3. Make any relevant changes and click **OK** to confirm any changes or **Cancel** to disregard.

### Delete a Custom Field

1. To delete a custom field, click in the **Delete?** tick box, next to the relevant field.
2. Click **Delete**, at the bottom of the screen.
3. You will be asked to **Confirm delete?** Click **OK** to confirm or **Cancel** to disregard.

### Commodity Group Patterns

1. To view the Commodity Group Patterns, click



2. For further information on using this screen, see page 65.

### Store Groups

1. To view the Store Groups, click
2. A screen, similar to that below, will be displayed:



## System Store Groups

Edit

- Department and Task

System Store Groups window

## Edit a Store Group

1. To edit a Store Group, click name.

### Add a New Type

1. Type in the relevant text in the **Description** field.
2. Click **Add New**.
3. The screen will refresh and the new Item will be displayed.

### Assign a Task

1. To assign a task to the store group, click relevant name.
2. A screen, similar to that below, will be displayed:

## Department and Task Store Group type

Global

DEPT: 5 TASK: 7	Available
<input checked="" type="checkbox"/> 0000 : Whole Store	<input checked="" type="checkbox"/> 0000 : Whole Store
<input type="checkbox"/> 0001 : Management	<input type="checkbox"/> 0000 : No Task
• 0001 : Admin & Management	
• 0002 : Cash Procedures	
<input type="checkbox"/> 0002 : Store	
• 0004 : Shop	
<input type="checkbox"/> 0003 : Customer Service	
• 0003 : Checkout	
<input type="checkbox"/> 0004 : Support	
• 0005 : Shop Support	
• 0006 : Cleaning	
• 0007 : Stocktake	

## Department and Task Store Group Type window

3. Click task on the right and side of the screen and click **<< Add** to move assign it.
4. Click on a task on the left hand side of the screen and click **Remove >>** to unassign it.
5. Use the **Move Up** and **Move Down** to change the order that the tasks appear in the list.

## Assign a Store

1. To assign a store to the task, click Assign Stores, at the bottom of the screen.
2. A screen, similar to that below, will be displayed:

**Search**

Search For:  ☒ All ☐ Store ☐ Store Link ☐ Region ☐ Store Group

No search

---

**Filter**

**Store Links** ☒ All (8 Store Links) **Regions** ☒ All (3 Regions) **Store Groups** ☒ All (1 Store Group)

**Forecast Cost Models**

001 : Default  
Unassigned

**Work Standards Models**

Global Model  
Unassigned

**Commodity Group Patterns**

Normal

**Enterprise**

Region 1  
Region 2

**Unassigned**

Store	Forecast Cost Model	Region	Store Group
1229 : Birmingham	001 : Default	Region 1	Unassigned
1002 : Coventry	001 : Default	Region 1	Unassigned
1010 : Stratford	001 : Default	Region 1	Unassigned
1004 : Walsall	001 : Default	Region 1	Unassigned
1003 : Wolverhampton	001 : Default	Region 1	Unassigned
1005 : Worcester	001 : Default	Region 1	Unassigned
1007 : Derby	001 : Default	Region 2	Unassigned

10 stores

>

>>

<

<<


**Selected Stores**

OK Cancel


### Assign a Store window

- For further information on using this screen, see page 174.


### Rename a Type

- To rename a type, click  icon, next to the relevant type.
- Type in the new text and click **Save Change** link to save and confirm the change or **Cancel** to disregard.

### Delete a Type


- To delete a type, click  icon, next to the relevant type.
- You will be asked **Are you sure you wish to delete this type?** Click on **OK** to confirm or **Cancel** to disregard.

### Rename a Store Group

- To rename a Store Group, click  icon, next to the relevant type.
- Type in the new text and click **Save Change** link to save and confirm the change or **Cancel** to disregard.

### Store Parameters



- To view the Store Parameters, click .
- For further information on using this screen, see page 81.

---

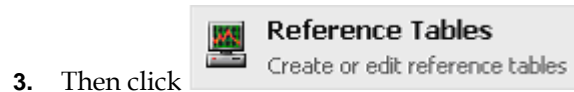
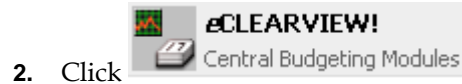
## Reference Tables

The **Reference Tables** provide a spreadsheet-like environment for maintaining *e*CLEARVIEW supporting data.

### Accessing the Reference Tables

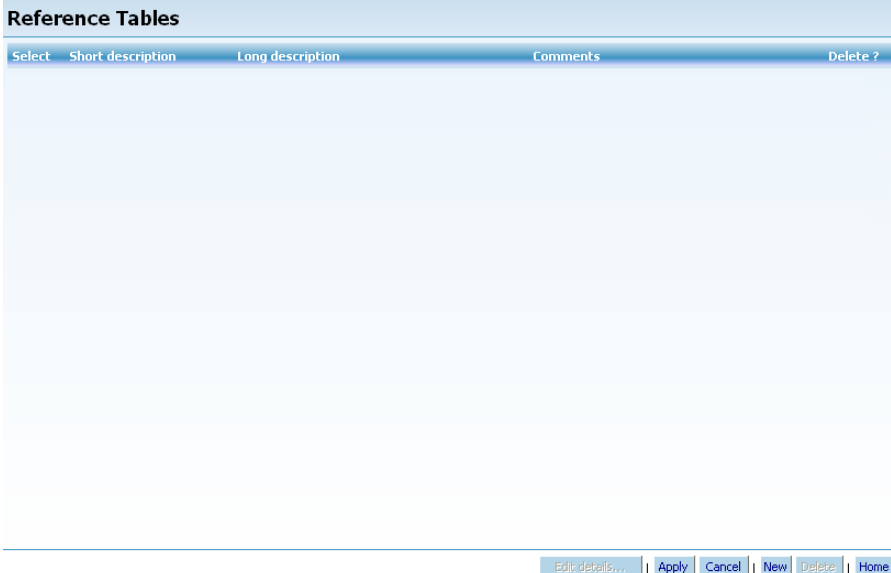
To access the new **Reference Tables** section:

1. Log into the software as usual.



### Creating a New Table

Once the **Reference Tables** area has been accessed, a screen, similar to that below, will be displayed:

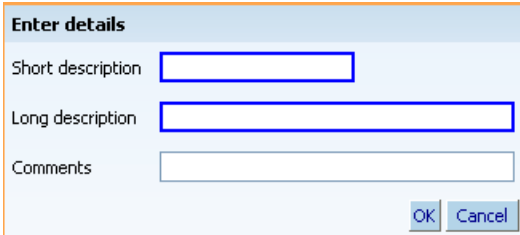


The screenshot shows the 'Reference Tables' window. It has a title bar 'Reference Tables' and a header row with columns: 'Select', 'Short description', 'Long description', 'Comments', and 'Delete ?'. The main area is empty. At the bottom right, there are buttons: 'Edit details...', 'Apply', 'Cancel', 'New', 'Delete', and 'Home'.

#### Reference Tables window

To add a new table to the list, follow the steps below:

1. Click **New**. The screen below will appear:



The screenshot shows the 'Enter details' window. It has a title bar 'Enter details' and three text input fields: 'Short description', 'Long description', and 'Comments'. At the bottom right, there are buttons: 'OK' and 'Cancel'.

#### Enter Details window

2. Enter a **Short Description** (maximum of 19 characters).
3. Enter a **Long Description** (maximum of 127 characters).



---

**Note:** You are not able to use special characters such as “£\$%^” etc, in the Description boxes.

---

4. Enter a **Comment**, if necessary.
5. Once complete, click **OK**.
6. The table information will now appear in the list.

### Changing the Name of a Table

To change either the **Short Description**, **Long Description** or **Comments**, follow the steps below:

1. Highlight the text you want to change, in the list of tables.
2. Type the new text, which will replace the information already there.
3. Once you have confirmed the text is correct, click **Apply**.
4. The information will now be updated.

### Adding a Row

Click **Add row** at the bottom of the screen. A new line will be added to the bottom of the existing rows.

	<input checked="" type="radio"/> Sales	<input type="radio"/> Labour Cost
<input checked="" type="radio"/> Level 1	0	5000
<input type="radio"/> Level 2	20000	7500
<input type="radio"/> Level 3	40000	10000
<input type="radio"/> Level 4	60000	15000
<input type="radio"/> Level 5	70000	16000

Add a Row window

	<input checked="" type="radio"/> Sales	<input type="radio"/> Labour Cost
<input checked="" type="radio"/> Level 1	0	5000
<input type="radio"/> Level 2	20000	7500
<input type="radio"/> Level 3	40000	10000
<input type="radio"/> Level 4	60000	15000
<input type="radio"/> Level 5	70000	16000
<input type="radio"/> G		

### Adding a Column

1. Click **Add column** at the bottom of the screen. A new column will appear to the right hand side of the existing columns.

	<input checked="" type="radio"/> Sales	<input type="radio"/> Labour Cost
<input checked="" type="radio"/> Level 1	0	5000
<input type="radio"/> Level 2	20000	7500
<input type="radio"/> Level 3	40000	10000
<input type="radio"/> Level 4	60000	15000
<input type="radio"/> Level 5	70000	16000

	<input checked="" type="radio"/> Sales	<input type="radio"/> Labour Cost	<input type="radio"/> C
<input checked="" type="radio"/> Level 1	0	5000	
<input type="radio"/> Level 2	20000	7500	
<input type="radio"/> Level 3	40000	10000	
<input type="radio"/> Level 4	60000	15000	
<input type="radio"/> Level 5	70000	16000	

Add a Column window

---

### Deleting a Row

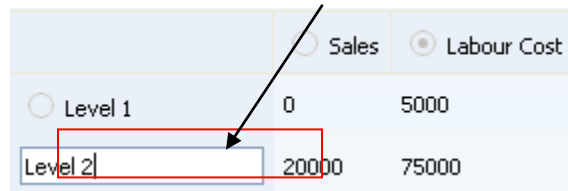
1. Click row that you want to delete.
2. Click **Delete row** at the bottom of the screen.
3. You will be asked '<ROW NAME> Are you sure you want to delete this row?'. If you are sure, click **OK**. Otherwise, click **Cancel**.

### Deleting a Column

1. Click column that you want to delete.
2. Click **Delete column** at the bottom of the screen.
3. You will be asked '<COLUMN NAME> Are you sure you want to delete this column?'. If you are sure, click **OK**. Otherwise, click **Cancel**.

### Renaming Rows

1. Click name you want to change for example,



<input type="radio"/> Level 1	0	5000
<input type="text" value="Level 2"/>	20000	75000

### Renaming a Row window

2. Type in the new name, which will overwrite the previous one.
3. Click **Enter** key on the keyboard.
4. Click **Apply** at the bottom of the screen.

### Renaming Columns

1. Click name you want to change.
2. Type in the new name, which will overwrite the previous one.
3. Click **Enter** key on the keyboard.
4. Click **Apply** at the bottom of the screen.

### Adding Data to a Cell


1. Click in the cell, where you want to enter the information.
2. The current value will appear at the top of the screen, next to the  $f_x$  symbol.
3. Type in the new value and click **Enter** key on the keyboard to confirm.

### Creating an Effective Date

To set a date, from when the information in the table will take effect, follow the steps below:

1. Click New effective date button.
2. You will be asked 'Do you want to save current changes?' If you select OK, any information you have just changed, will be saved. Otherwise, click on Cancel. A screen, similar to that below, will be displayed:

#### Create New Effective Date window

3. Select the relevant **Source date** from the list.
4. Either type in the **Effective date** or click  button and click relevant date.
5. Enter any **Comments**, if applicable.
6. Once you have confirmed the information is correct, click **OK** button. Otherwise, click on **Cancel**.

#### Deleting an Effective Date

1. Click Delete effective date.
2. You will be asked 'Do you want to save current changes?' If you select OK, any information you have just changed, will be saved. Otherwise, click on Cancel.
3. A list of all available tables will be displayed:

#### Select Table Record for Deletion window

4. Select the relevant table and click **OK**. Otherwise, click on **Cancel**.

#### Selecting a Table

This section allows you to open a different table, without having to return to the previous list.

1. Click **Select table**.
2. You will be asked '**Do you want to save current changes?**' If you select **OK**, any information you have just changed, will be saved. Otherwise, click on **Cancel**.
3. A list of all available tables will be displayed:



**Select table**

**Hurdle Rates : Hurdle Rates - Sales / Labour Costs**

☐ base record

☐ 04/07/06

☐ 31/07/06

OK Cancel

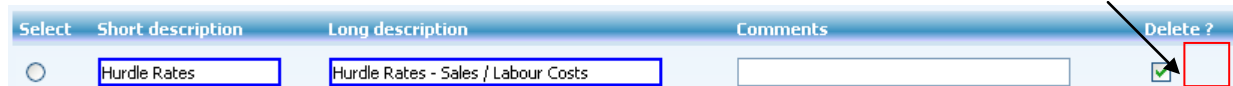
#### Select Table window

4. Select the relevant table and click **OK** to display the table information. Otherwise, click on **Cancel**.

### Deleting a Table

To delete a table from the list, follow the steps below:

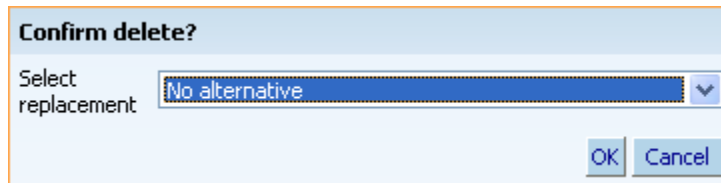
1. Tick the **Delete** box, on the right hand side of the screen, next to the table you want to delete.



Select	Short description	Long description	Comments	Delete ?
<input type="radio"/>	Hurdle Rates	Hurdle Rates - Sales / Labour Costs		<input checked="" type="checkbox"/>

#### Deleting a Table

2. The **Delete** button will become active at the bottom of the screen. Click this button and the screen below will be displayed:



**Confirm delete?**

Select replacement: No alternative

OK Cancel

#### Confirm Delete window

3. Either select an alternative table from the list, by clicking arrow button, left clicking table and selecting the **OK** or leave the option on its default setting, **No alternative**, and click on **OK**.

Selecting an alternative table will re-assign all references for the table being deleted, to this defined table.

## Company Structure



1. To view the company structure information, click
2. A screen, similar to that below, will be displayed:

**Torexretail** Administrator Week 5 : 29 January 2007 Home Log off

**Editing Regions and Store Names**

Regions: 3 Store Names: 10

Enterprise	Available
<input type="checkbox"/> Region 1	<input type="checkbox"/> Available Items
• 1229 : Birmingham	• 1232 : Witney
• 1002 : Coventry	
• 1010 : Stratford	
• 1004 : Walsall	
• 1003 : Wolverhampton	
• 1005 : Worcester	
<input type="checkbox"/> Region 2	

<< Add  
Remove >>  
Move Up  
Move Down

OK Cancel

Editing Regions and Store Names window

### Adding a Store to a Region

1. To add a store to a region, click on its name on the right hand side of the screen.
2. Click **<< Add**.

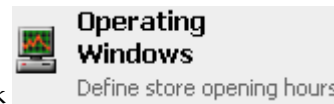
### Removing a Store from a Region

1. To remove a store from a region, click on its name on the left hand side of the screen.
2. Click **Remove >>**, which will move the name to the right hand side of the screen.

### Moving a Store in a Region

1. To move a store, click on its name on the left hand side of the screen.
2. Click **Move Up** to move the name up 1 place in the list.
3. Click **Move Down** to move the name 1 place down in the list.

## Operating Windows



1. To view the Operating Windows screen, click
2. A screen, similar to that below, will be displayed:

**Torexretail** Administrator Week 5 : 29 January 2007 Operating Windows Home Log off

Select item Find  Go

FilesetID	WindowCode	EffectiveDate
1002 : Coventry		
1003 : Wolverhampton		
1004 : Walsall		
1005 : Worcester		
1006 : Leicester		
1007 : Derby		
1008 : Nottingham		
1009 : Stoke		
1010 : Stratford		
1229 : Birmingham		
1232 : Witney		

100-tes

Back Edit

**Torexretail**

Select Item window

### Add a New Operating Window

1. To add an operational window, click relevant store.
2. Click **Edit**.
3. Select the relevant option from the list and click **Edit**.
4. Click **New**.
5. Enter the relevant times and mark whether it should be the default hours for the store.
6. When ready, click **OK** to save and confirm or **Cancel** to disregard.

### Edit an Operating Window

1. To edit an operational window, click relevant store.
2. Click **Edit**.
3. Select the relevant option from the list and click **Edit**.
4. Select the relevant option from the list and click **Edit**.
5. Make any appropriate changes and click **OK** to save and confirm or **Cancel** to disregard.

---

## Delete an Operating Window

1. To delete an operational window, click relevant store.
2. Click **Edit**.
3. Select the relevant option from the list and click **Edit**.
4. Select the relevant option from the list and click **Delete**.
5. You will be asked **Are you sure you want to delete this item?** Click on **Yes** to confirm or **Cancel** to disregard.

## Adding an Operational Window Code

1. To edit an operational window code, click relevant store.
2. Click **Edit**.
3. Click **Edit Master List**.
4. Click **New**.
5. Enter the relevant information and click **OK** to save and confirm or **Cancel** to disregard.

## Editing an Operational Window Code

1. To edit an operational window code, click relevant store.
2. Click **Edit**.
3. Click **Edit Master List**.
4. Click relevant code and click **Edit**.
5. Make applicable changes and click **OK** to save and confirm or **Cancel** to disregard.

## Deleting an Operational Window Code

1. To delete an operational window code, click relevant store.
2. Click **Edit**.
3. Click **Edit Master List**.
4. Click relevant code and click **Delete**.
5. You will be asked **Are you sure you want to delete this item?** Click on **Yes** to confirm or **Cancel** to disregard.

## Stores



### Stores

Select a store to work with.

1. To view or edit the store information, click
2. A screen, similar to that below, will be displayed:

**Torexretail** Administrator Week 5 : 29 January 2007 [Home](#) [Log off](#)

Select item Find  [Go](#)

	NAME ↑	DESC	StoreGroups
1002		Coventry	No Group
1003		Wolverhampton	No Group
1004		Walsall	No Group
1005		Worcester	No Group
1006		Leicester	No Group
1007		Derby	No Group
1008		Nottingham	No Group
1009		Stoke	No Group
1010		Stratford	No Group
1229		Birmingham	No Group
1232		Witney	No Group

100-123

[Select](#) [Copy](#) [Edit](#) [New](#) [Delete](#)

**Torexretail**

Select Item window

## Add a New Store

1. To add a New Store to the system, click **New**, at the bottom of the screen.
2. Enter the relevant information and click **OK** to save and confirm or **Cancel** to disregard.

## Edit a Store

1. To edit a store, click on it, so that it is highlighted.
2. Click **Edit**.
3. Make any applicable changes and click **OK** to save and confirm or **Cancel** to disregard.

## Select a Store

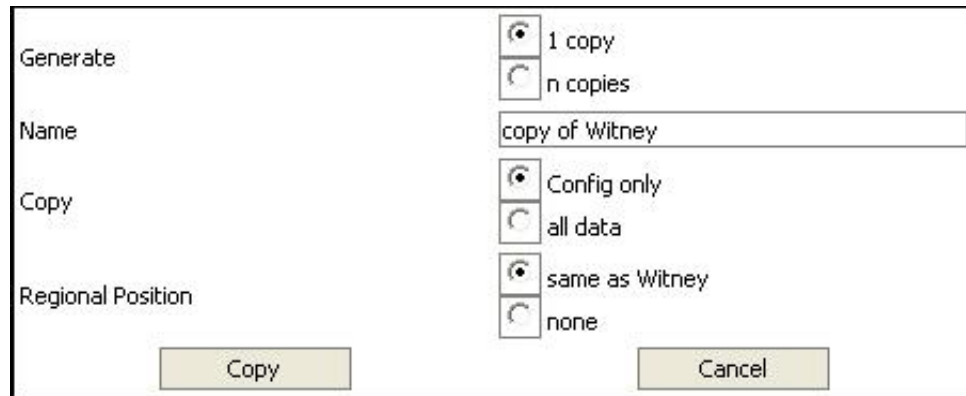
1. To select a store, click on it, so that it is highlighted.
2. Click **Select**, at the bottom of the screen.



## Copy a Store

If you are adding multiple stores, you can use the **Copy** function to speed up the process.

1. Click relevant store, it will become highlighted.
2. Click **Copy**.
3. A screen, similar to that below, will be displayed:



Generate	<input checked="" type="radio"/> 1 copy <input type="radio"/> n copies
Name	<input type="text" value="copy of Witney"/>
Copy	<input checked="" type="radio"/> Config only <input type="radio"/> all data
Regional Position	<input checked="" type="radio"/> same as Witney <input type="radio"/> none
<div>Copy</div> <div>Cancel</div>	

### Copy a Store window

4. By default, this screen will make 1 copy of a store. If you want more than 1, click **n copies** option and enter the number of stores required.
5. Enter an appropriate name.
6. Select which information you want to copy.
7. Select the **Regional Position**.
8. Click **Copy** to save and confirm or **Cancel** to disregard.

## Delete a Store

1. To delete a store from the system, select it and it will become highlighted.
2. Click **Delete**.
3. You will be asked **Are you sure you want to delete this item?** Click **Yes** to confirm or **Cancel** to disregard.

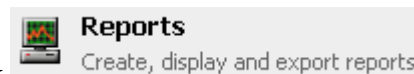
## Reports

### Hours and Costs

This report shows the total number of hours and costs generated by the selected store filters, split into weekly periods.

#### Running the Report

1. To access the **Hours and Costs** Report, click



menu and then



2. A screen, similar to that below, will be displayed:

## Create and Export a Forecast Report

Select Forecast 1229 2007/08

Export Report 

## Create and Export a Forecast Report window

3. Choose the required Forecast from the list and then click **Select Options**.
4. You will then be prompted to select the relevant Region, Division or Store, from the list provided.

## Export options for 1229 Birmingham 2007

Select regions, divisions and stores

☐ 1229 : BIRMINGHAM 

## Export Options window

5. Typing a name or part of a name in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
6. To tick all of the locations in the list, click **Select All**, at the bottom of the screen.
7. To untick all of the locations in the list, click **De-Select All**, at the bottom of the screen.
8. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
9. When you have made your selection, click **Next**.
10. A list of all of the Store Filters will be displayed.

## Export options for 1229 2007/08

Select store filter

☐ 0000 : Whole Store☐ 0001 : SHOP FLOOR☐ 0001 : Till 1☐ 0002 : Till 2☐ 0003 : Floor Manager☐ 0004 : Assistant 1

Select All

De-select All

Invert All

&lt; Back

Next &gt;

Cancel

find

## Export Options window

11. Typing a name or part of a name in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
12. To tick all of the filters in the list, click **Select All**, at the bottom of the screen.
13. To untick all of the filters in the list, click **De-Select All**, at the bottom of the screen.
14. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
15. When you have made your selection, click **Next**.
16. A list of all of the Date Filters will be displayed.

## Export options for 1229 2007/08

Select date filter

☐ YEAR 2007☐ 2007 QUARTER 1☐ 2007 MONTH 1☐ WEEK 1 01/04/07☐ WEEK 2 08/04/07☐ WEEK 3 15/04/07

Select All

De-select All

Invert All

&lt; Back

Next &gt;

Cancel

find

## Export Options window

17. Typing a date or part of a date in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
18. To tick all of the filters in the list, click **Select All**, at the bottom of the screen.
19. To untick all of the filters in the list, click **De-Select All**, at the bottom of the screen.
20. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
21. When you have made your selection, click **Next**.
22. A list of all of the required fields will be displayed.

## Export options for 1229 2007/08

Select required fields

☐ Fields☐ Items☐ Sales☐ Minimum Hours☐ Maximum Hours☐ Standard Hours

Select All

De-select All

Invert All

&lt; Back

Next &gt;

Cancel

## Export Options window

23. Typing a name or part of a name in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
24. To tick all of the fields in the list, click **Select All**, at the bottom of the screen.
25. To untick all of the fields in the list, click **De-Select All**, at the bottom of the screen.
26. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
27. When you have made your selection, click **Next**.
28. You are then required to enter the Output Location for the report for example, Where do you want it to be saved?

## Export options for 1229 2007/08

Select output location

Full UNC path and filename report.xls

E.g. \\mycomputer\myshare\report.xls

If no computer name is specified the file will be saved on 127.0.0.1 in the directory c:\disks\

Select All

De-select All

Invert All

&lt; Back

Finish

Cancel

## Export Options window

29. The filename **report.xls** will be set as the default name for this report. To change this, click into the field, delete the current name and type a new name.
30. The default location for the report will be displayed on the screen for example, c:\disks on the machine 127.0.0.1. To change this location, type the Full UNC path and filename into the field for example, \\192.168.0.2\Report Folder\Report.xls. If you do not understand this process, speak to your System Administrator.

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**Note:** Depending on the size of the Forecast and the options selected, the report may take a considerable amount of time to generate. Once it is complete, you will be returned to the **Reports** menu.

---

### Viewing the Report

1. To view the report, go to the location where it was saved.
2. Double click file, for example, Report.xls.
3. The report will open in Microsoft Excel and will look similar to the screen below:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Level	Date Range	Page											
2	1229 : BIRMINGHAM	WEEK 1 01/04/07	1											
3	1229 : BIRMINGHAM	WEEK 2 08/04/07	2											
4	1229 : BIRMINGHAM	WEEK 3 15/04/07	3											
5	1229 : BIRMINGHAM	WEEK 4 22/04/07	4											
6	1229 : BIRMINGHAM	WEEK 5 29/04/07	5											
7	1229 : BIRMINGHAM	WEEK 6 06/05/07	6											
8	1229 : BIRMINGHAM	WEEK 7 13/05/07	7											
9	1229 : BIRMINGHAM	WEEK 8 20/05/07	8											
10	1229 : BIRMINGHAM	WEEK 9 27/05/07	9											
11	1229 : BIRMINGHAM	WEEK 10 03/06/07	10											
12	1229 : BIRMINGHAM	WEEK 11 10/06/07	11											
13	1229 : BIRMINGHAM	WEEK 12 17/06/07	12											
14	1229 : BIRMINGHAM	WEEK 13 24/06/07	13											
15	1229 : BIRMINGHAM	WEEK 14 01/07/07	14											
16	1229 : BIRMINGHAM	WEEK 15 08/07/07	15											
17	1229 : BIRMINGHAM	WEEK 16 15/07/07	16											
18	1229 : BIRMINGHAM	WEEK 17 22/07/07	17											
19	1229 : BIRMINGHAM	WEEK 18 29/07/07	18											
20	1229 : BIRMINGHAM	WEEK 19 05/08/07	19											
21	1229 : BIRMINGHAM	WEEK 20 12/08/07	20											
22	1229 : BIRMINGHAM	WEEK 21 19/08/07	21											
23	1229 : BIRMINGHAM	WEEK 22 26/08/07	22											
24	1229 : BIRMINGHAM	WEEK 23 02/09/07	23											
25	1229 : BIRMINGHAM	WEEK 24 09/09/07	24											
26	1229 : BIRMINGHAM	WEEK 25 16/09/07	25											
27	1229 : BIRMINGHAM	WEEK 26 23/09/07	26											
28	1229 : BIRMINGHAM	WEEK 27 30/09/07	27											
29	1229 : BIRMINGHAM	WEEK 28 07/10/07	28											
30	1229 : BIRMINGHAM	WEEK 29 14/10/07	29											
31	1229 : BIRMINGHAM	WEEK 30 21/10/07	30											
32	1229 : BIRMINGHAM	WEEK 31 28/10/07	31											
33	1229 : BIRMINGHAM	WEEK 32 04/11/07	32											
34	1229 : BIRMINGHAM	WEEK 33 11/11/07	33											
35	1229 : BIRMINGHAM	WEEK 34 18/11/07	34											
36	1229 : BIRMINGHAM	WEEK 35 25/11/07	35											
37	1229 : BIRMINGHAM	WEEK 36 02/12/07	36											
38	1229 : BIRMINGHAM	WEEK 37 09/12/07	37											



### Viewing the Report window

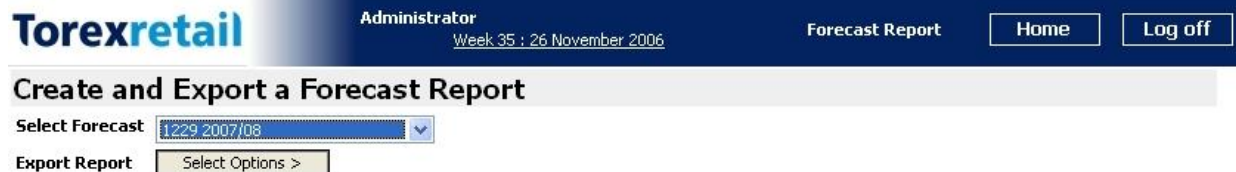
4. The Region, Department and Store information is displayed in the first column (**Level**).
5. The **Date Range** shows the dates selected in the Forecast.
6. **Page**, indicates the tab that the information can be located on for example, Page 1 etc at the bottom of the screen.
7. Clicking **Page 1** tab, at the bottom of the screen, will display a screen similar to the one below:
8. Clicking pages, at the bottom of the screen, will display results for a different week.

## Week Summary

This report shows the total number of hours and costs generated by the selected store filters, split into monthly periods and divided by weeks.

### Running the Report

1. To access the **Week Summary** report, click  **Reports** Create, display and export reports menu and then the  **Week Summary** Create and export a forecast weekly summary report.
2. A screen, similar to that below, will be displayed:



### Create and Export a Forecast Report window

3. Choose the required Forecast from the list and then click **Select Options**.
4. You will then be prompted to select the relevant Region, Division or Store, from the list provided.



### Export Options window

5. Typing a name or part of a name in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
6. To tick all of the locations in the list, click **Select All**, at the bottom of the screen.

7. To untick all of the locations in the list, click **De-Select All**, at the bottom of the screen.
8. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
9. When you have made your selection, click **Next**.
10. A list of all of the Store Filters will be displayed.

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### Export options for 1229 2007/08

Select store filter  find

- ☐ 0000 : Whole Store
  - ☐ 0001 : SHOP FLOOR
    - ☐ 0001 : Till 1
    - ☐ 0002 : Till 2
    - ☐ 0003 : Floor Manager
    - ☐ 0004 : Assistant 1

Select All De-select All Invert All < Back Next > Cancel

**Torexretail**

#### Export Options window

11. Typing a name or part of a name in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
12. To tick all of the filters in the list, click **Select All**, at the bottom of the screen.
13. To untick all of the filters in the list, click **De-Select All**, at the bottom of the screen.
14. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
15. When you have made your selection, click **Next**.
16. A list of all of the Date Filters will be displayed.

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### Export options for 1229 2007/08

Select date filter  find

- ☐ YEAR 2007
  - ☐ 2007 QUARTER 1
    - ☐ 2007 MONTH 1
      - ☐ WEEK 1 01/04/07
      - ☐ WEEK 2 08/04/07
      - ☐ WEEK 3 15/04/07
      - ☐ WEEK 4 22/04/07

Select All De-select All Invert All < Back Next > Cancel

**Torexretail**

#### Export Options window

17. Typing a date or part of a date in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.



18. To tick all of the filters in the list, click **Select All**, at the bottom of the screen.
19. To untick all of the filters in the list, click **De-Select All**, at the bottom of the screen.
20. Click **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
21. When you have made your selection, click **Next**.
22. A list of all of the required fields will be displayed.

#### Export Options window

23. Typing a name or part of a name in the field in the top right hand corner of the screen and click **Find**, will highlight the entered information in the list.
24. To tick all of the fields in the list, click **Select All**, at the bottom of the screen.
25. To untick all of the fields in the list, click **De-Select All**, at the bottom of the screen.
26. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
27. When you have made your selection, click **Next**.
28. You are then required to enter the Output Location for the report for example, Where do you want it to be saved?

#### Export Options window



29. The filename **report.xls** will be set as the default name for this report. To change this, click into the field, delete the current name and type a new name.
30. The default location for the report will be displayed on the screen for example, c:\disks on the machine 127.0.0.1. To change this location, type the Full UNC path and filename into the field for example, \\192.168.0.2\Report Folder\Report.xls. If you do not understand this process, speak to your System Administrator.

---

**Note:** Depending on the size of the Forecast and the options selected, the report may take a considerable amount of time to generate. Once it is complete, you will be returned to the **Reports** menu.

---

### Viewing the Report

1. To view the report, go to the location where it was saved.
2. Double click file, for example, Report.xls.
3. The report will open in Microsoft Excel and will look similar to the screen below:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Level	Date Range	Page											
2	1229: BIRMINGHAM	2007 MONTH 1	1											
3	1229: BIRMINGHAM	2007 MONTH 2	2											
4	1229: BIRMINGHAM	2007 MONTH 3	3											
5	1229: BIRMINGHAM	2007 MONTH 4	4											
6	1229: BIRMINGHAM	2007 MONTH 5	5											
7	1229: BIRMINGHAM	2007 MONTH 6	6											
8	1229: BIRMINGHAM	2007 MONTH 7	7											
9	1229: BIRMINGHAM	2007 MONTH 8	8											
10	1229: BIRMINGHAM	2007 MONTH 9	9											
11	1229: BIRMINGHAM	2007 MONTH 10	10											
12	1229: BIRMINGHAM	2007 MONTH 11	11											
13	1229: BIRMINGHAM	2007 MONTH 12	12											
14														
15														
16														
17														
18														
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38														

### Viewing a Report window

4. The Region, Department and Store information is displayed in the first column (**Level**).
5. The **Date Range** shows the dates selected in the Forecast.
6. **Page**, indicates the tab that the information can be located on for example, Page 1 etc at the bottom of the screen.
7. Clicking **Page 1** tab, at the bottom of the screen, will display a screen similar to the one below:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1		Store ID	1229		Area 22						Time Period		2007 MONTH 1		Page 1				
2		Store Name	1229 : BIRMINGHAM		Group 42														
3		0003 : Till 1									0004 : Till 2								
4																			
5			Hours	WEEK 1 01/04/07	WEEK 2 08/04/07	WEEK 3 15/04/07	WEEK 4 22/04/07				Hours	WEEK 1 01/04/07	WEEK 2 08/04/07	WEEK 3 15/04/07	WEEK 4 22/04/07				
6		0006 : CPU1	353.00	88.25	88.25	88.25	88.25				0027 : CPU2	353.00	88.25	88.25	88.25	88.25			
7																			
8		Total	353.00	88.25	88.25	88.25	88.25				Total	353.00	88.25	88.25	88.25	88.25			
9																			
10		0005 : Floor Manager									0006 : Assistant 1								
11																			
12			Hours	WEEK 1 01/04/07	WEEK 2 08/04/07	WEEK 3 15/04/07	WEEK 4 22/04/07				Hours	WEEK 1 01/04/07	WEEK 2 08/04/07	WEEK 3 15/04/07	WEEK 4 22/04/07				
13		0039 : Floor Manager	280.00	70.00	70.00	70.00	70.00				0040 : Assistant	287	71.75	71.75	71.75	71.75			
14																			
15																			
16		Total	280.00	70.00	70.00	70.00	70.00				Total	287	71.75	71.75	71.75	71.75			
17																			
18																			
19			Period	WEEK 1 01/04/07	WEEK 2 08/04/07	WEEK 3 15/04/07	WEEK 4 22/04/07				Period	WEEK 1 01/04/07	WEEK 2 08/04/07	WEEK 3 15/04/07	WEEK 4 22/04/07				
20		Sales	£1,138,431	£266,114	£303,459	£267,183	£301,875				Absence	0.00	0.00	0.00	0.00	0.00			
21																			
22		Total Hours	1,273.00								Total Cost	£110,922.01							
23																			
24																			
25																			
26																			
27																			
28																			
29																			
30																			
31																			
32																			
33																			
34																			
35																			

#### Report window

- Clicking pages, at the bottom of the screen, will display results for a different Month.

## Hours List Excel Summary

This report outputs all of the Forecast Hours data, into an Excel Spreadsheet.

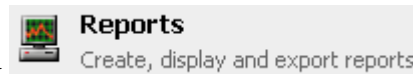
- To see the original data, from the main screen, click



then

### Running the Report

- To access the **Hours List Excel Report**, click



menu and then the

button.

- A screen, similar to that below, will be displayed:

## Create and Export a Forecast Report

Select Forecast 1229 2007/08

Export Report Select Options &gt;

## Create and Export a Forecast Report window

3. Choose the required Forecast from the list and then click **Select Options**.
4. You will then be prompted to select the relevant Region, Division or Store, from the list provided.

## Export options for 1229 Birmingham 2007

Select regions, divisions and stores

 Find☐ 1229 : BIRMINGHAM

Select All

De-select All

Invert All

&lt; Back

Next &gt;

Cancel

## Export Options window

5. Typing a name or part of a name in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
6. To tick all of the locations in the list, click **Select All**, at the bottom of the screen.
7. To untick all of the locations in the list, click **De-Select All**, at the bottom of the screen.
8. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
9. When you have made your selection, click **Next**.
10. A list of all of the Store Filters will be displayed.

## Export options for 1229 2007/08

Select store filter

☐ 0000 : Whole Store☐ 0001 : SHOP FLOOR☐ 0001 : Till 1☐ 0002 : Till 2☐ 0003 : Floor Manager☐ 0004 : Assistant 1

Select All

De-select All

Invert All

&lt; Back

Next &gt;

Cancel

## Export Options window

11. Typing a name or part of a name in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
12. To tick all of the filters in the list, click **Select All**, at the bottom of the screen.
13. To untick all of the filters in the list, click **De-Select All**, at the bottom of the screen.
14. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
15. When you have made your selection, click **Next**.
16. A list of all of the Date Filters will be displayed.

## Export options for 1229 2007/08

Select date filter

☐ YEAR 2007☐ 2007 QUARTER 1☐ 2007 MONTH 1☐ WEEK 1 01/04/07☐ WEEK 2 08/04/07☐ WEEK 3 15/04/07☐ WEEK 4 22/04/07

Select All

De-select All

Invert All

&lt; Back

Next &gt;

Cancel

## Export Options window

17. Typing a date or part of a date in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
18. To tick all of the filters in the list, click **Select All**, at the bottom of the screen.
19. To untick all of the filters in the list, click **De-Select All**, at the bottom of the screen.
20. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
21. When you have made your selection, click **Next**.
22. A list of all of the required fields will be displayed.

## Export options for 1229 2007/08

Select required fields

☐ Fields☐ Items☐ Sales☐ Minimum Hours☐ Maximum Hours☐ Standard Hours

Select All

De-select All

Invert All

&lt; Back

Next &gt;

Cancel

find

## Export Options window

23. Typing a name or part of a name in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
24. To tick all of the fields in the list, click **Select All**, at the bottom of the screen.
25. To untick all of the fields in the list, click **De-Select All**, at the bottom of the screen.
26. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
27. When you have made your selection, click **Next**.
28. You are then required to enter the Output Location for the report for example, Where do you want it to be saved?

## Export options for 1229 2007/08

Select output location

Full UNC path and filename report.xls

E.g. \\mycomputer\myshare\report.xls

If no computer name is specified the file will be saved on 127.0.0.1 in the directory c:\disks\

Select All

De-select All

Invert All

&lt; Back

Finish

Cancel

find

## Export Options window

29. The filename **report.xls** will be set as the default name for this report. To change this, click into the field, delete the current name and type a new name.
30. The default location for the report will be displayed on the screen for example, c:\disks on the machine 127.0.0.1. To change this location, type the Full UNC path and filename into the field for example, \\192.168.0.2\Report Folder\Report.xls. If you do not understand this process, speak to your System Administrator.

---

**Note:** Depending on the size of the Forecast and the options selected, the report may take a considerable amount of time to generate. Once it is complete, you will be returned to the **Reports** menu.

---

### Viewing the Report

1. To view the report, go to the location where it was saved.
2. Double click file, for example, Report.xls.
3. The report will open in Microsoft Excel and will look similar to the screen below:

	A	B	C	D	E	F	G	H	I	J	K	L	
1	STORE ID	STORE NAME	DEPT NAME	TASK NAME	DATE RANGE	ALLOWEDHOURS	PI	LCP	STANDARDHOURS	Min Hours	Max Hours	Flex Base	It
2	1229	1229 : BIRMINGHAM	Whole Store :		Year 2007	59,899.50	100.00	0.00	59,899.50	0.00	0.00	14,310.00	1,1
3													
4													
5													
6													
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38													



### Viewing a Report window

4. The relevant Store information is displayed first, with the Forecast data leading off to the right hand side of the screen.

## Hours List CSV list

This file exports the Hours, Absence Hours and Training Hours for a selected Task.

### Generating the List

1. To access the **Hours List CSV List**, click  **Reports**  
Create, display and export reports menu
- and then the  **Hours List CSV File**  
Create and export a forecast hours list CSV file .
2. A screen, similar to that below, will be displayed:

## Create and Export a Forecast Report

Select Forecast 1229 2007/08

Export Report 

## Create and Export a Forecast Report window

- Choose the required Forecast from the list and then click **Select Options**.
- You will then be prompted to select the relevant Region, Division or Store, from the list provided.

## Export options for 1229 Birmingham 2007

Select regions, divisions and stores

☐ 1229 : BIRMINGHAM 

## Export Options window

- Typing a name or part of a name in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
- To tick all of the locations in the list, click **Select All**, at the bottom of the screen.
- To untick all of the locations in the list, click **De-Select All**, at the bottom of the screen.
- Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
- When you have made your selection, click **Next**.
- A list of all of the Store Filters will be displayed.

## Export options for 1229 2007/08

Select store filter

 find

- ☐ 0000 : Whole Store
- ☐ 0001 : SHOP FLOOR
  - ☐ 0001 : Till 1
  - ☐ 0002 : Till 2
  - ☐ 0003 : Floor Manager
  - ☐ 0004 : Assistant 1

Select All

De-select All

Invert All

&lt; Back

Next &gt;

Cancel

## Export Options window

11. Typing a name or part of a name in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
12. To tick all of the filters in the list, click **Select All**, at the bottom of the screen.
13. To untick all of the filters in the list, click **De-Select All**, at the bottom of the screen.
14. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
15. When you have made your selection, click **Next**.
16. A list of all of the Date Filters will be displayed.

## Export options for 1229 2007/08

Select date filter

 find

- ☐ YEAR 2007
- ☐ 2007 QUARTER 1
- ☐ 2007 MONTH 1
- ☐ WEEK 1 01/04/07
- ☐ WEEK 2 08/04/07
- ☐ WEEK 3 15/04/07
- ☐ WEEK 4 22/04/07

Select All

De-select All

Invert All

&lt; Back

Next &gt;

Cancel

## Export Options window

17. Typing a date or part of a date in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
18. To tick all of the filters in the list, click **Select All**, at the bottom of the screen.
19. To untick all of the filters in the list, click **De-Select All**, at the bottom of the screen.
20. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
21. When you have made your selection, click **Next**.
22. A list of all of the required fields will be displayed.



## Export options for 1229 2007/08

Select required fields

☐ Fields☐ Items☐ Sales☐ Minimum Hours☐ Maximum Hours☐ Standard Hours

Select All

De-select All

Invert All

&lt; Back

Next &gt;

Cancel

## Export Options window

23. Typing a name or part of a name in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
24. To tick all of the fields in the list, click **Select All**, at the bottom of the screen.
25. To untick all of the fields in the list, click **De-Select All**, at the bottom of the screen.
26. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
27. When you have made your selection, click **Next**.
28. You are then required to enter the Output Location for the file for example, Where do you want it to be saved?

## Export options for 1229 2007/08

Select output location

Full UNC path and filename export.csv

E.g. \\mycomputer\myshare\export.csv

If no computer name is specified the file will be saved on localhost in the directory c:\disks\

Select All

De-select All

Invert All

&lt; Back

Finish

Cancel

## Export Options window

29. The filename **export.csv** will be set as the default name for this file. To change this, click into the field, delete the current name and type a new name.
30. The default location for the report will be displayed on the screen for example, c:\disks on the machine 127.0.0.1. To change this location, type the Full UNC path and filename into the field for example, \\192.168.0.2\Report Folder\export.csv. If you do not understand this process, speak to your System Administrator.

---

**Note:** Depending on the size of the Forecast and the options selected, the file may take a considerable amount of time to generate. Once it is complete, you will be returned to the **Reports** menu.

---

### Viewing the List

1. To view the file, go to the location where it was saved.
2. Double click file, for example, export.csv.
3. The file will open in Microsoft Excel and will look similar to the screen below:

	A	B	C	D	E	F	G	H	I	J	K
1	STORE ID	STORE NAME	DEPT NAME	TASK NAME	DATE RANGE	HOURS	ABSENCE HOURS	TRAINING HOURS			
2	1229	1229 : Birmingham	0000 : Whole Store		Year 2007	12,970	324	244			
3											
4											
5											
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33											

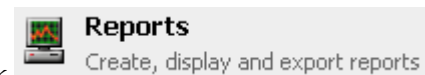
Viewing the List window

## Element Level Excel Report

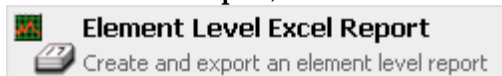
This report displays the hours for a selected task, broken down by its Elements.

### Running the Report

1. To access the **Element Level Excel Report**, click



menu and then the



2. A screen, similar to that below, will be displayed:

## Create and Export a Forecast Report

Select Forecast 1229 2007/08

Export Report 

## Running the Report window

3. Choose the required Forecast from the list and then click **Select Options**.
4. You will then be prompted to select the relevant Region, Division or Store, from the list provided.

## Element Level Export Options for 1229 Birmingham 2007

Select regions, divisions and stores

☐ 1229 : BIRMINGHAM 

## Export Options window

5. Typing a name or part of a name in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
6. To tick all of the locations in the list, click **Select All**, at the bottom of the screen.
7. To untick all of the locations in the list, click **De-Select All**, at the bottom of the screen.
8. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
9. When you have made your selection, click **Next**.
10. A list of all of the Tasks will be displayed.

## Element Level Export Options for 1229 2007/08

Select task

☐ 0001 : Till 1☐ 0002 : Till 2☐ 0003 : Floor Manager☐ 0004 : Assistant 1

find

Select All

De-select All

Invert All

&lt; Back

Next &gt;

Cancel

## Export Options window

11. Typing a name or part of a name in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
12. To tick all of the filters in the list, click **Select All**, at the bottom of the screen.
13. To untick all of the filters in the list, click **De-Select All**, at the bottom of the screen.
14. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
15. When you have made your selection, click **Next**.
16. A list of all of the Dates will be displayed.

## Element Level Export Options for 1229 2007/08

Select date

☐ YEAR 2007☐ 2007 QUARTER 1☐ 2007 MONTH 1☐ WEEK 1 01/04/07☐ WEEK 2 08/04/07☐ WEEK 3 15/04/07☐ WEEK 4 22/04/07

find

Select All

De-select All

Invert All

&lt; Back

Next &gt;

Cancel

## Export Options window

17. Typing a date or part of a date in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
18. To tick all of the filters in the list, click **Select All**, at the bottom of the screen.
19. To untick all of the filters in the list, click **De-Select All**, at the bottom of the screen.
20. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
21. When you have made your selection, click **Next**.
22. You are then required to enter the Output Location for the report for example, Where do you want it to be saved?

## Element Level Export Options for 1229 2007/08

Select output location

 findFull UNC path and filename 

E.g. \\mycomputer\myshare\element\_level\_report.xls

If no computer name is specified the file will be saved on localhost in the directory c:\disks\

Select All

De-select All

Invert All

&lt; Back

Finish

Cancel

## Export Options window

23. The filename **element\_level\_report.xls** will be set as the default name for this file. To change this, click into the field, delete the current name and type a new name.
24. The default location for the report will be displayed on the screen for example, c:\disks on the machine 127.0.0.1. To change this location, type the Full UNC path and filename into the field for example, \\192.168.0.2\Report Folder\element\_level\_report.xls. If you do not understand this process, speak to your System Administrator.

---

**Note:** Depending on the size of the Forecast and the options selected, the file may take a considerable amount of time to generate. Once it is complete, you will be returned to the **Reports** menu.

---

## Viewing the Report

1. To view the report, go to the location where it was saved.
2. Double click file, for example, element\_level\_report.xls.
3. The report will open in Microsoft Excel and will look similar to the screen below:

	A	B	C	D	E	F	G	H	I	J	K	L
1	STORE ID	STORE NAME	TASK NAME	ELEMENT NAME	DATE RANGE	HOURS						
2	1229	1229 : BIRMINGHAM	0006 : CPU1	11010101 : CPU 1	YEAR 2007	246.79875						
3	1229	1229 : BIRMINGHAM	0006 : CPU1	11010102 : CPU 1 - Topup	YEAR 2007	98.2259025						
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#### Viewing the Report window

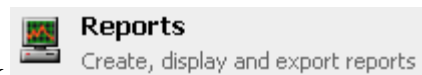
- The Store information is located on the left hand side of the screen, with the Element and Hours data to the right.

## Element Level CSV File

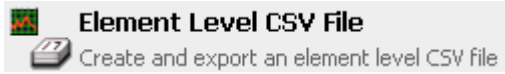
This file outputs the hours for a selected task, broken down by its Elements.

### Running the Report

- To access the **Element Level CSV File**, click



menu and then the



- A screen, similar to that below, will be displayed:

## Create and Export a Forecast Report

Select Forecast 1229 2007/08

Export Report 

## Create and Export a Forecast Report window

3. Choose the required Forecast from the list and then click **Select Options**.
4. You will then be prompted to select the relevant Region, Division or Store, from the list provided.

## Element Level Export Options for 1229 Birmingham 2007

Select regions, divisions and stores

 ☐ 1229 : BIRMINGHAM

## Export Options window

5. Typing a name or part of a name in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
6. To tick all of the locations in the list, click **Select All**, at the bottom of the screen.
7. To untick all of the locations in the list, click **De-Select All**, at the bottom of the screen.
8. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
9. When you have made your selection, click **Next**.
10. A list of all of the Store Filters will be displayed.

## Element Level Export Options for 1229 2007/08

Select task

- ☐ 0001 : Till 1
- ☐ 0002 : Till 2
- ☐ 0003 : Floor Manager
- ☐ 0004 : Assistant 1

find

Select All

De-select All

Invert All

&lt; Back

Next &gt;

Cancel

## Export Options window

11. Typing a name or part of a name in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
12. To tick all of the filters in the list, click **Select All**, at the bottom of the screen.
13. To untick all of the filters in the list, click **De-Select All**, at the bottom of the screen.
14. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
15. When you have made your selection, click **Next**.
16. A list of all of the Date Filters will be displayed.

## Element Level Export Options for 1229 2007/08

Select date

- ☐ YEAR 2007
- ☐ 2007 QUARTER 1
- ☐ 2007 MONTH 1
- ☐ WEEK 1 01/04/07
- ☐ WEEK 2 08/04/07
- ☐ WEEK 3 15/04/07
- ☐ WEEK 4 22/04/07

find

Select All

De-select All

Invert All

&lt; Back

Next &gt;

Cancel

## Export Options window

17. Typing a date or part of a date in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
18. To tick all of the filters in the list, click **Select All**, at the bottom of the screen.
19. To untick all of the filters in the list, click **De-Select All**, at the bottom of the screen.
20. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
21. When you have made your selection, click **Next**.
22. You are then required to enter the Output Location for the file for example, Where do you want it to be saved?



## Element Level Export Options for 1229 2007/08

Select output location

 findFull UNC path and filename 

E.g. \\mycomputer\myshare\element\_level\_export.csv

If no computer name is specified the file will be saved on localhost in the directory c:\disks\

Select All

De-select All

Invert All

&lt; Back

Finish

Cancel

## Export Options window

23. The filename **element\_level\_export.csv** will be set as the default name for this file. To change this, click into the field, delete the current name and type a new name.
24. The default location for the report will be displayed on the screen for example, c:\disks on the machine 127.0.0.1. To change this location, type the Full UNC path and filename into the field for example, \\192.168.0.2\Report Folder\element\_level\_export.csv. If you do not understand this process, speak to your System Administrator.

---

**Note:** Depending on the size of the Forecast and the options selected, the file may take a considerable amount of time to generate. Once it is complete, you will be returned to the **Reports** menu.

---

## Viewing the File

1. To view the file, go to the location where it was saved.
2. Double click file, for example, element\_level\_export.csv.
3. The file will open in Microsoft Excel and will look similar to the screen below:


	A	B	C	D	E	F	G	H	I	J	K	L
1	STORE ID	STORE NAME	TASK NAME	ELEMENT NAME	DATE RANGE	HOURS						
2	1229	1229 : BIRMINGHAM	0006 : CPU1	11010101 : CPU 1	YEAR 2007	246.79875						
3	1229	1229 : BIRMINGHAM	0006 : CPU1	11010102 : CPU 1 - Topup	YEAR 2007	98.2259025						
4												
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9												
10												
11												
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33												


Viewing the Report window

## Breakdown


This report shows the total number of Hours and Items, generated by each task, split into Monthly periods.

### Running the Report

- To access the **Breakdown**, click  **Reports** Create, display and export reports menu and then

the  **Breakdown** Create and export a forecast breakdown report .

- A screen, similar to that below, will be displayed:



Administrator  
Week 35 : 26 November 2006

Forecast Report
Home
Log off

Create and Export a Forecast Report

Select Forecast 1229 2007/08

Export Report Select Options >

Create and Export a Forecast Report window

3. Choose the required Forecast from the list and then click **Select Options**.
4. You will then be prompted to select the relevant Region, Division or Store, from the list provided.

**Torexretail** Administrator Week 35 : 26 November 2006 Home Log off

### Export options for 1229 Birmingham 2007

Select regions, divisions and stores

☐ 1229 : BIRMINGHAM

Select All De-select All Invert All < Back Next > Cancel

**Torexretail**

#### Export Options window

5. Typing a name or part of a name in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
6. To tick all of the locations in the list, click **Select All**, at the bottom of the screen.
7. To untick all of the locations in the list, click **De-Select All**, at the bottom of the screen.
8. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
9. When you have made your selection, click **Next**.
10. A list of all of the Store Filters will be displayed.

**Torexretail** Administrator Week 35 : 26 November 2006 Home Log off

### Export options for 1229 2007/08

Select store filter

☐ 0000 : Whole Store

☐ 0001 : SHOP FLOOR

☐ 0001 : Till 1

☐ 0002 : Till 2

☐ 0003 : Floor Manager

☐ 0004 : Assistant 1

Select All De-select All Invert All < Back Next > Cancel

**Torexretail**

#### Export Options window

11. Typing a name or part of a name in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
12. To tick all of the filters in the list, click **Select All**, at the bottom of the screen.
13. To untick all of the filters in the list, click **De-Select All**, at the bottom of the screen.

14. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
15. When you have made your selection, click **Next**.
16. A list of all of the Date Filters will be displayed.

#### Export Options window

17. Typing a date or part of a date in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
18. To tick all of the filters in the list, click **Select All**, at the bottom of the screen.
19. To untick all of the filters in the list, click **De-Select All**, at the bottom of the screen.
20. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
21. When you have made your selection, click **Next**.
22. A list of all of the required fields will be displayed.

#### Export Options window

23. Typing a name or part of a name in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
24. To tick all of the fields in the list, click **Select All**, at the bottom of the screen.
25. To untick all of the fields in the list, click **De-Select All**, at the bottom of the screen.

26. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
27. When you have made your selection, click **Next**.
28. You are then required to enter the Output Location for the report for example, Where do you want it to be saved?

#### Export Options window

29. The filename **report.xls** will be set as the default name for this report. To change this, click into the field, delete the current name and type a new name.
30. The default location for the report will be displayed on the screen for example, c:\disks on the machine 127.0.0.1. To change this location, type the Full UNC path and filename into the field for example, \\192.168.0.2\Report Folder\Report.xls. If you do not understand this process, speak to your System Administrator.

**Note:** Depending on the size of the Forecast and the options selected, the report may take a considerable amount of time to generate. Once it is complete, you will be returned to the **Reports** menu.

#### Viewing the Report

1. To view the report, go to the location where it was saved.
2. Double click file, for example, Report.xls.
3. The report will open in Microsoft Excel and will look similar to the screen below:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	<b>Level</b>	<b>Date Range</b>	<b>Page</b>											
2	1229 : BIRMINGHAM	2007 MONTH 1	1											
3	1229 : BIRMINGHAM	2007 MONTH 2	2											
4	1229 : BIRMINGHAM	2007 MONTH 3	3											
5	1229 : BIRMINGHAM	2007 MONTH 4	4											
6	1229 : BIRMINGHAM	2007 MONTH 5	5											
7	1229 : BIRMINGHAM	2007 MONTH 6	6											
8	1229 : BIRMINGHAM	2007 MONTH 7	7											
9	1229 : BIRMINGHAM	2007 MONTH 8	8											
10	1229 : BIRMINGHAM	2007 MONTH 9	9											
11	1229 : BIRMINGHAM	2007 MONTH 10	10											
12	1229 : BIRMINGHAM	2007 MONTH 11	11											
13	1229 : BIRMINGHAM	2007 MONTH 12	12											
14														
15														
16														
17														
18														
19														
20														
21														
22														
23														
24														
25														
26														
27														
28														
29														
30														
31														
32														
33														
34														
35														
36														
37														
38														

#### Viewing the Report window

4. The Region, Department and Store information is displayed in the first column (**Level**).
5. The **Date Range** shows the dates selected in the Forecast.
6. **Page**, indicates the tab that the information can be located on for example, Page 1 etc at the bottom of the screen.
7. Clicking **Page 1** tab, at the bottom of the screen, will display a screen similar to the one below:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1		Store ID	1229		Area 22			Time Period	2007 MONTH 1			Page 1			
2		Store Name	1229 : BIRMINGHAM		Group 42										
3		0003 : TILL 1						0004 : TILL 2							
4															
5			Items	Hours	SubTotal				Items	Hours	SubTotal				
6		0006 : CPU1			353.00			0027 : CPU2			353.00				
7															
8		Total			353.00			Total			353.00				
9															
10		0013 : FLOOR MANAGER						0014 : ASSISTANT 1							
11															
12			Items	Hours	SubTotal				Items	Hours	SubTotal				
13		0039 : Floor Manager			280.00			0040 : Assistant			287.00				
14															
15		Total			280.00			Total			287.00				
16															
17															
18		Total Hours			1,273.00										
19															
20															
21															
22															
23															
24															
25															
26															
27															
28															
29															
30															
31															
32															
33															
34															
35															
36															
37															

#### Report window

- Clicking pages, at the bottom of the screen, will display results for a different Month.

## New Summary

This report shows the total number of Hours generated by each task and the Sales Forecast. It also displays any allocated Holiday/Sick and Training hours.


### Running the Report

- To access the **New Summary**, click  **Reports** Create, display and export reports menu and

then the  **New Summary** Create and export a forecast new summary report.

- A screen, similar to that below, will be displayed:

## Create and Export a Forecast Report

Select Forecast  

Export Report

## Create and Export a Forecast Report

- Choose the required Forecast from the list and then click **Select Options**.
- You will then be prompted to select the relevant Region, Division or Store, from the list provided.

## Export options for 1229 Birmingham 2007

Select regions, divisions and stores

☐ 1229 : BIRMINGHAM

## Export Options window

- Typing a name or part of a name in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
- To tick all of the locations in the list, click **Select All**, at the bottom of the screen.
- To untick all of the locations in the list, click **De-Select All**, at the bottom of the screen.
- Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
- When you have made your selection, click **Next**.
- A list of all of the Store Filters will be displayed.



## Export options for 1229 2007/08

Select store filter

☐ 0000 : Whole Store☐ 0001 : SHOP FLOOR☐ 0001 : Till 1☐ 0002 : Till 2☐ 0003 : Floor Manager☐ 0004 : Assistant 1

Select All

De-select All

Invert All

&lt; Back

Next &gt;

Cancel

find

## Export Options window

11. Typing a name or part of a name in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
12. To tick all of the filters in the list, click **Select All**, at the bottom of the screen.
13. To untick all of the filters in the list, click **De-Select All**, at the bottom of the screen.
14. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
15. When you have made your selection, click **Next**.
16. A list of all of the Date Filters will be displayed.

## Export options for 1229 2007/08

Select date filter

☐ YEAR 2007☐ 2007 QUARTER 1☐ 2007 MONTH 1☐ WEEK 1 01/04/07☐ WEEK 2 08/04/07☐ WEEK 3 15/04/07☐ WEEK 4 22/04/07

Select All

De-select All

Invert All

&lt; Back

Next &gt;

Cancel

find

## Export Options window

17. Typing a date or part of a date in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
18. To tick all of the filters in the list, click **Select All**, at the bottom of the screen.
19. To untick all of the filters in the list, click **De-Select All**, at the bottom of the screen.
20. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
21. When you have made your selection, click **Next**.
22. A list of all of the required fields will be displayed.

## Export options for 1229 2007/08

Select required fields

☐ Fields☐ Items☐ Sales☐ Minimum Hours☐ Maximum Hours☐ Standard Hours

Select All

De-select All

Invert All

&lt; Back

Next &gt;

Cancel

## Export Options window

23. Typing a name or part of a name in the field in the top right hand corner of the screen and clicking **Find**, will highlight the entered information in the list.
24. To tick all of the fields in the list, click **Select All**, at the bottom of the screen.
25. To untick all of the fields in the list, click **De-Select All**, at the bottom of the screen.
26. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.
27. When you have made your selection, click **Next**.
28. You are then required to enter the Output Location for the report for example, Where do you want it to be saved?

## Export options for 1229 2007/08

Select output location

Full UNC path and filename report.xls

E.g. \\mycomputer\myshare\report.xls

If no computer name is specified the file will be saved on 127.0.0.1 in the directory c:\disks\

Select All

De-select All

Invert All

&lt; Back

Finish

Cancel

## Export Options window

29. The filename **report.xls** will be set as the default name for this report. To change this, click into the field, delete the current name and type a new name.
30. The default location for the report will be displayed on the screen for example, c:\disks on the machine 127.0.0.1. To change this location, type the Full UNC path and filename into the field for example, \\192.168.0.2\Report Folder\Report.xls. If you do not understand this process, speak to your System Administrator.

**Note:** Depending on the size of the Forecast and the options selected, the report may take a considerable amount of time to generate. Once it is complete, you will be returned to the **Reports** menu.

## Viewing the Report

1. To view the report, go to the location where it was saved.
2. Double click file, for example, Report.xls.
3. The report will open in Microsoft Excel and will look similar to the screen below:

[illegible]

## Viewing the Report window

4. The Region, Department and Store information is displayed in the first column (**Level**).
5. The **Date Range** shows the dates selected in the Forecast.
6. **Page**, indicates the tab that the information can be located on for example, Page 1 etc at the bottom of the screen.
7. Clicking **Page 1** tab, at the bottom of the screen, will display a screen similar to the one below:

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Store ID	1229		Area 22						Time Period		2007 MONTH 1		Page 1	
2	Store Name	1229 : BIRMINGHAM		Group 42											
3															
4	Sales Forecast	2007	Week 01	Week 02	Week 03	Week 04			Total Department Hours	2007	Week 01	Week 02	Week 03	Week 04	
5		£1,138,431	£266,114	£303,459	£267,183	£301,675				1,580.00	395.00	395.00	395.00	395.00	
6															
7	0003 : TILL 1								0004 : TILL 2						
8															
9		Hours	Week 01	Week 02	Week 03	Week 04				Hours	Week 01	Week 02	Week 03	Week 04	
10	0006 : CPU1	353.00	88.25	88.25	88.25	88.25			0027 : CPU2	704.75	165.00	187.25	166.00	186.50	
11															
12	Total	353.00	88.25	88.25	88.25	88.25			Total	1,985.50	442.50	549.50	444.25	549.25	
13															
14	0005 : FLOOR MANAGER								0006 : ASSISTANT 1						
15															
16		Hours	Week 01	Week 02	Week 03	Week 04				Hours	Week 01	Week 02	Week 03	Week 04	
17	0039: Floor Manager	280	70	70	70	70			0040 : Assistant	287.00	71.75	71.75	71.75	71.75	
18															
19	Total	280.00	70.00	70.00	70.00	70.00			Total	287.00	71.75	71.75	71.75	71.75	
20															
21															
22	Total Store Hours	1,580		Holiday/Sick		0			Training	0					
23															
24															
25															
26															
27															
28															
29															
30															
31															
32															
33															
34															
35															
36															
37															

## Report window

- Clicking pages, at the bottom of the screen, will display results for a different Month.

## Elements

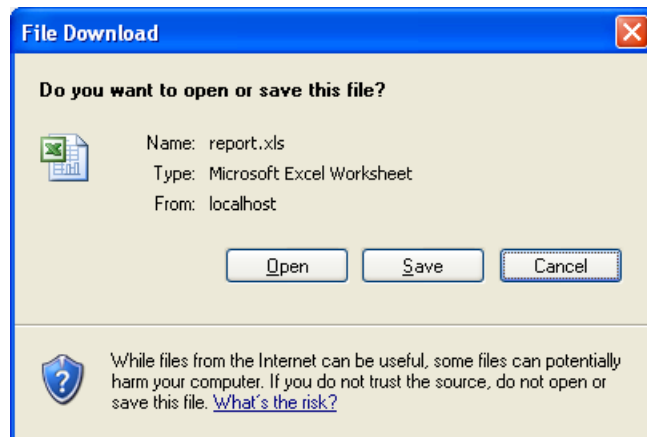
Selecting this report will export all of the **Work Elements** in the system, into an Excel spreadsheet.

## Running the Report

- To access the **Elements**, click



- A screen, similar to that below, will be displayed:



## File Download window

3. Selecting **Open** will display the report in Microsoft Excel.
4. Clicking on **Save** will allow to select a location to save the document, so that it may be viewed later.
5. Clicking on **Cancel** will stop the process and return you to the Reports screen.
6. If you chose to **Open** the file, or opened it at a later date, a screen, similar to that below, will be displayed:

A	B	C	D	E	F	G	H	I	J
1	Work Elements Report	Run Date: 28/11/06				Page 1			
2									
3	Work Element	Effective Date	SCRIPT	SMV	Driver	Frequency			
4	11010101: CPU 1	01/01/01	\$GetTaskSales(6,2)*1.395/60;						
5	11010102: CPU 1 - Topup	01/01/01	\$GetTaskElementHours(6,656)*\$VLOOKUP(site info.model,"TblCTPTopUps","CPU1TopUp","Model Number");						
6	11010103: CPU 2	01/01/01	\$GetTaskSales(7,2)*1.395/60;						
7	11010104: CPU 2 - Topup	01/01/01	\$GetTaskElementHours(7,658)*\$VLOOKUP(site info.model,"TblCTPTopUps","CPU2TopUp","Model Number");						
8	11010105: CPU 3	01/01/01	\$GetTaskSales(8,2)*1.395/60;						
9	11010106: CPU 3 - Topup	01/01/01	\$GetTaskElementHours(8,660)*\$VLOOKUP(site info.model,"TblCTPTopUps","CPU3TopUp","Model Number");						
10	11010201: Fashion + Premium Consultants	01/01/01	var storeranking;var RMhours;var Benefithours;var Fashionhours;storeranking = store params.MiscStoreRanking						
11	11010202: Fashion + Premium Counter	01/01/01	var actualworkload;var consultanthours;var counterhours;actualworkload = \$GetTaskSales(9,2)*4.126/60;consu						
12	11010203: Fashion + Premium Counter - Topup	01/01/01	(\$GetTaskElementHours(9,662)+\$GetTaskElementHours(9,663))*store params.GlobFPCTupAllow;						
13	11010204: No7 Consultants	01/01/01	\$if(store params.GlobNo7HoursOverride=0,store params.GlobNo7HoursOverride*37.5,\$VSTEPPED(store params						
14	11010205: Beauty Expert	01/01/01	var no7tot;var fragtot;var ebtot;no7tot = \$if(store params.GlobNo7HoursOverride=0,store params.GlobNo7HoursC						
15	11010206: No7 Counter	01/01/01	var actualworkload;var consultanthours;var counterhours;actualworkload = \$GetTaskSales(10,2)*3.489/60;co						
16	11010207: No7 Counter - Topup	01/01/01	(\$GetTaskElementHours(10,665)+\$GetTaskElementHours(10,666)+\$GetTaskElementHours(10,667))*store params						
17	11010208: Fragrance Consultants	01/01/01	var fragrancesplit;var totfragtrans;totfragtrans = \$GetTaskElementSales(11,670,2)+\$GetTaskElementSales(12,67						
18	11010209: Fragrance Counter	01/01/01	var actualworkload;var consultanthours;var counterhours;actualworkload = \$GetTaskSales(11,2)*3.402/60;co						
19	11010210: Fragrance Counter - Topup	01/01/01	(\$GetTaskElementHours(11,669)+\$GetTaskElementHours(11,670))*store params.GlobFragCTupAllow;						
20	11010211: Mens Consultants	01/01/01	var menssplit;var totfragtrans;totfragtrans = \$GetTaskElementSales(11,670,2)+\$GetTaskElementSales(12,673,2);						
21	11010212: Mens Counter	01/01/01	var actualworkload;var consultanthours;var counterhours;actualworkload = \$GetTaskSales(12,2)*3.402/60;co						
22	11010213: Mens Counter - Topup	01/01/01	(\$GetTaskElementHours(12,672)+\$GetTaskElementHours(12,673))*store params.GlobMensCTupAllow;						
23	11010214: EB Consultants	01/01/01	\$if(store params.GlobEBHoursOverride=0,store params.GlobEBHoursOverride*37.5,\$VSTEPPED(store params.Ve						
24	11010215: EB Counter	01/01/01	var actualworkload;var consultanthours;var counterhours;actualworkload = \$GetTaskSales(13,2)*3.152/60;co						
25	11010216: EB Counter - Topup	01/01/01	(\$GetTaskElementHours(13,675)+\$GetTaskElementHours(13,676))*store params.GlobEBCTupAllow;						
26	11010217: Photo Consultants	01/01/01	\$if(store params.MiscStoreRanking<=150,\$if(store params.GlobPhotoHoursOverride=0,store params.GlobPhotoH						
27	11010218: Photo Counter	01/01/01	var actualworkload;var consultanthours;var counterhours;actualworkload = \$GetTaskSales(14,2)*5.819/60;co						
28	11010219: Photo Counter - Topup	01/01/01	(\$GetTaskElementHours(14,678)+\$GetTaskElementHours(14,679))*store params.GlobPhotCTupAllow;						
29	11010220: Skincare Advisor	01/01/01	\$if(store params.FlagSkincareTop100==1,37.5,0);						
30	11010221: Sunshop Consultant	01/01/01	\$VSTEPPED(store params.MiscStoreRanking,"NumberOfSunshopAdvisors","Hours Requirement","Store Ranking"						
31	11010222: Healthcare Consultant	01/01/01	\$if(store params.FlagVitaminTop100==1,37.5,0);						
32	11010223: Leisure PS	01/01/01	\$GetTaskSales(18,2)*2.510/60;						
33	11010224: Leisure PS - Topup	01/01/01	\$GetTaskElementHours(18,684)*\$VLOOKUP(site info.model,"TblCTPTopUps","LeisurePSTopUp","Model Number");						
34	11010225: Baby	01/01/01	\$GetTaskSales(19,2)*2.510/60;						
35	11010226: Baby - Topup	01/01/01	\$GetTaskElementHours(19,686)*\$VLOOKUP(site info.model,"TblCTPTopUps","BabyTopUp","Model Number");						
36	11010227: Food	01/01/01	\$GetTaskSales(20,2)*2.510/60;						
37	11010228: Food - Topup	01/01/01	\$GetTaskElementHours(20,688)*\$VLOOKUP(site info.model,"TblCTPTopUps","FoodTopUp","Model Number");						

#### Viewing the Report window

7. The report displays the name of each **Work Element**, **Effective Date**, **Script**, **SMV**, **Driver** and **Frequency**, if applicable. Additional Work Elements can be displayed by clicking **Page** tabs at the bottom of the screen.

## Export

Selecting the **Export** option will transfer the following information into an Excel spreadsheet:

- Models
- Elements
- Store parameters
- Operating Windows
- Costing Models

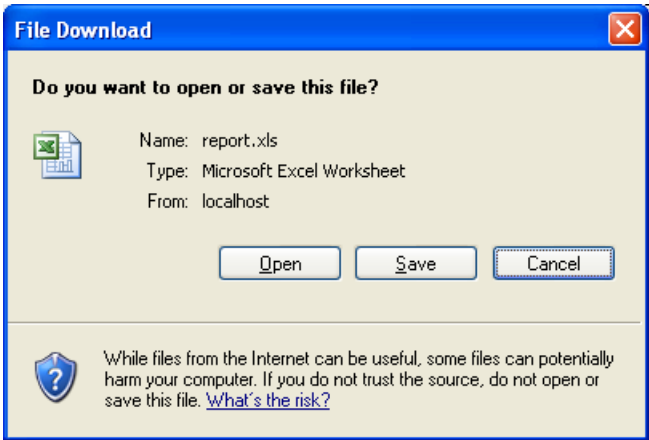
#### Running the Report

1. To access the **Export**, click



and then the

2. A screen, similar to that below, will be displayed:



**File Download window**

3. Selecting **Open** will display the report in Microsoft Excel.
4. Clicking on **Save** will allow to select a location to save the document, so that it may be viewed later.
5. Clicking on **Cancel** will stop the process and return you to the Reports screen.

### Viewing the Report

1. If you chose to **Open** the file, or opened it at a later date, a screen, similar to that below, will be displayed:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V
1						<b>Models</b>																
2																						
3						<b>Large Store</b>																
4																						
5						<b>Departments</b>																
6						<b>Customer Pay Points :</b>																
7						1 0010 : Kidswear																
8						2 0008 : Cardshop																
9						3 0006 : Conf																
10						4 0002 : Toys																
11						5 0013 : Kit Hhold																
12						6 0014 : Garden																
13						7 0007 : Snacks																
14						8 0004 : Books																
15						9 0009 : Stat																
16						10 0012 : DIY																
17						11 0005 : News & Mags																
18						12 0011 : Adultwear																
19						13 0015 : Gifts																
20						<b>Entertainment :</b>																
21						1 0003 : Ent																
22						<b>Initiative 2 :</b>																
23						1 Whole Store : Whole Store																
24						<b>Initiative 3 :</b>																
25						1 Whole Store : Whole Store																
26						<b>Initiative 4 :</b>																
27						1 Whole Store : Whole Store																
28						<b>Initiative 5 :</b>																
29						1 Whole Store : Whole Store																
30						<b>Initiative 6 :</b>																
31						1 Whole Store : Whole Store																
32						<b>Initiative 7 :</b>																
33						1 Whole Store : Whole Store																
34						<b>Initiative 8 :</b>																
35						1 Whole Store : Whole Store																
36						<b>Initiative 9 :</b>																
37						1 Whole Store : Whole Store																

**Viewing a Report window**

2. This first screen shows all of the **Models** from the System.
3. Selecting the **Elements** tab will display a list of all of the **Elements** in the System.

A	B	C	D	E	F	G	H	I	J	K
1	<b>Elements</b>									
2	<b>Element</b>	<b>Date</b>	<b>Fixed?</b>	<b>Freeform</b>	<b>Script</b>	<b>Driver</b>	<b>SMV</b>	<b>Frequency</b>		
3	001 : Sales Floor Cust	01/01/2000	variable	yes	((0.001786/store params.Peak Week Perc)*store params.Cust Serv Ramp)*(\$GetTaskSales(5,1)+\$GetTaskSales(5,1)*0.0083835/store params.Peak Week Perc);					
4	002 : In Trade Fill	01/01/2000	variable	yes	(\$GetTaskSales(5,1)*(1-store params.OOH Fill Percent))*(0.0083835/store params.Peak Week Perc);					
5	003 : Extra Fill (Fri, Sat)	01/01/2000	variable	yes	(0.0012205/store params.Peak Week Perc)*\$GetTaskSales(5,1);					
6	004 : Extra Fill (High Pri)	01/01/2000	fixed	no	No Driver			0 015 : Once Per Week		
7	005 : Additional Sales	01/01/2000	variable	yes	\$if(store params.Number of Salesfloors>2,Windows.Store Trading Hours.Hours*2,\$if(store params.Number of Salesfloors=2,Windows.Store Trading Hours.Hours,0));					
8	006 : Clothing Band Hours	01/01/2000	variable	yes	store params.Clothing Band Hours;					
9	007 : Clean and Count	01/01/2000	fixed	no	No Driver			606 015 : Once Per Week		
10	008 : OOH Fill	01/01/2000	variable	yes	(\$GetTaskSales(6,1)*0.75)*(0.0041918/store params.Peak Week Perc);					
11	009 : OOH Management	01/01/2000	fixed	yes	0.5*(((\$GetTaskSales(6,1)*0.75)*(0.0041918/store params.Peak Week Perc))/store params.Peak Week Perc);					
12	010 : Stock Management	01/01/2000	fixed	no	No Driver			70.8 015 : Once Per Week		
13	013 : Lottery Element	01/01/2000	variable	no				0.1488 015 : Once Per Week		
14	014 : Ent In Trade Fill	01/01/2000	variable	yes	\$GetTaskSales(3,1)*(0.25)*0.0088;					
15	015 : Ent OOH Fill	01/01/2000	variable	yes	\$GetTaskSales(3,1)*(0.75)*0.0088;					
16	016 : Ent. Cash Desk	01/01/2000	fixed	no	No Driver			1117.8 015 : Once Per Week		
17	017 : Checkouts	01/01/2000	variable	yes	(0.0021070*(store params.Cust Paypoint Ramp))*\$GetTaskSales(1,1);					
18	018 : Minimum Manpower	01/01/2000	fixed	no	No Driver			3432 015 : Once Per Week		
19	020 : King Store Savings	01/01/2000	fixed	no	Sales			394.8 016 : Cluster		
20	021 : SM, Ams Element	01/01/2000	fixed	no	No Driver			8100 015 : Once Per Week		
21	022 : All Office Work 1	01/01/2000	fixed	no	No Driver			234 015 : Once Per Week		
22	023 : Stock Management	01/01/2000	variable	yes	var calc;calc=0.0022311*\$GetTaskSales(7,1);this=\$if(calc>140,140,calc);					
23	024 : Entertainment Cluster	01/01/2000	variable	yes	(0.0364394*store params.Cust Serv Ramp)*\$GetTaskSales(3,1)					
24	025 : Ent. Cash Desk 2	01/01/2000	variable	no	Items			0.744 015 : Once Per Week		
25	026 : Minimum Manpower	01/01/2000	variable	yes	(65*4)-(\$GetTaskSales(1,1)*0.0023;					
26	027 : All Office Work 2	01/01/2000	variable	yes	\$GetTaskSales(8,1)*(0.001128/store params.Peak Week Perc);					
27	028 : Sales Floor Target	01/01/2000	variable	yes	store params.Target Adjustment;					
28	029 : Sales Floor Top	01/01/2000	variable	yes	(((((store params.Sales Floor-store params.Sales Floor Cover)*0.99)-42)/store params.Peak Week Perc);					
29	030 : Permanent Difficulty	01/01/2000	variable	yes	store params.Difficulty Factor;					
30	031 : Shop Floor Top	01/01/2000	fixed	no	No Driver			300 015 : Once Per Week		
31	032 : Minimum POS'S	01/01/2000	variable	yes	(store params.Contractd Hours-store params.Base Hours)*\$if(store params.Cluster>8,0.8,\$if(store params.Cluster=8,0.8,1));					
32	033 : Ent Runners	15/10/2000	variable	yes	store params.Entertainment Runners;					
33	034 : Botany Bay	15/10/2000	variable	yes	store params.Botany Bay;					
34	035 : Electric Shop	15/10/2000	variable	yes	store params.Electric Shop					
35	036 : Top 200 xmas Service	15/10/2000	variable	yes	store params.Top 200 xmas Service;					
36	037 : Ent Extended	15/10/2000	variable	yes	store params.Ent Extended					
37	038 : Swap Element	01/01/2000	variable	yes	store params.Swap Hours					

Elements Tab window

4. Selecting the **Store Parameters** tab, displays all of the **Store Parameters** for each store.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	<b>Store Parameters</b>													
2														
3	<b>Name</b>	<b>Site</b>	<b>Effective date</b>	<b>Value</b>										
4	001 : Number of Cash Desks	0229 : Birmingham	30/07/2006	2										
5	001 : Number of Cash Desks	0229 : Birmingham	06/08/2006	2										
6	001 : Number of Cash Desks	0229 : Birmingham	13/08/2006	2										
7	001 : Number of Cash Desks	0229 : Birmingham	20/08/2006	2										
8	001 : Number of Cash Desks	0229 : Birmingham	27/08/2006	2										
9	001 : Number of Cash Desks	0229 : Birmingham	03/09/2006	2										
10	001 : Number of Cash Desks	0229 : Birmingham	10/09/2006	2										
11	001 : Number of Cash Desks	0229 : Birmingham	17/09/2006	2										
12	001 : Number of Cash Desks	0229 : Birmingham	24/09/2006	2										
13	001 : Number of Cash Desks	0229 : Birmingham	01/10/2006	2										
14	001 : Number of Cash Desks	0229 : Birmingham	08/10/2006	2										
15	001 : Number of Cash Desks	0229 : Birmingham	15/10/2006	2										
16	001 : Number of Cash Desks	0229 : Birmingham	22/10/2006	2										
17	001 : Number of Cash Desks	0229 : Birmingham	29/10/2006	2										
18	001 : Number of Cash Desks	0229 : Birmingham	05/11/2006	2										
19	001 : Number of Cash Desks	0229 : Birmingham	12/11/2006	2										
20	001 : Number of Cash Desks	0229 : Birmingham	19/11/2006	2										
21	001 : Number of Cash Desks	0229 : Birmingham	26/11/2006	2										
22	001 : Number of Cash Desks	0229 : Birmingham	03/12/2006	2										
23	001 : Number of Cash Desks	0229 : Birmingham	10/12/2006	2										
24	001 : Number of Cash Desks	0229 : Birmingham	17/12/2006	2										
25	001 : Number of Cash Desks	0229 : Birmingham	24/12/2006	2										
26	001 : Number of Cash Desks	0229 : Birmingham	31/12/2006	2										
27	001 : Number of Cash Desks	0229 : Birmingham	07/01/2007	2										
28	001 : Number of Cash Desks	0229 : Birmingham	14/01/2007	2										
29	001 : Number of Cash Desks	0229 : Birmingham	21/01/2007	2										
30	001 : Number of Cash Desks	0229 : Birmingham	28/01/2007	2										
31	001 : Number of Cash Desks	0314 : Witney	30/07/2006	1										
32	001 : Number of Cash Desks	0314 : Witney	06/08/2006	1										
33	001 : Number of Cash Desks	0314 : Witney	13/08/2006	1										
34	001 : Number of Cash Desks	0314 : Witney	20/08/2006	1										
35	001 : Number of Cash Desks	0314 : Witney	27/08/2006	1										
36	001 : Number of Cash Desks	0314 : Witney	03/09/2006	1										
37	001 : Number of Cash Desks	0314 : Witney	10/09/2006	1										

Store Parameters window

5. Selecting the **Windows** tab, displays the **Operating Windows** for each store.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1		Operating Windows													
2															
3															
4		Store Trading Hours													
5		0229 : Birmingham	Default	Sun	Mon	Tue	Wed	Thu	Fri	Sat					
6			Start	11:00	08:30	08:30	08:30	08:30	08:30	08:30					
7			Stop	17:00	18:00	18:00	18:00	20:00	18:00	18:00					
8		0229 : Birmingham	12/11/2006	Sun	Mon	Tue	Wed	Thu	Fri	Sat					
9			Start	11:00	08:30	08:30	08:30	08:30	08:30	08:30					
10			Stop	17:00	18:00	18:00	18:00	20:00	19:00	19:00					
11		0229 : Birmingham	19/11/2006	Sun	Mon	Tue	Wed	Thu	Fri	Sat					
12			Start	11:00	08:30	08:30	08:30	08:30	08:30	08:30					
13			Stop	17:00	18:00	18:00	18:00	20:00	19:00	19:00					
14		0229 : Birmingham	26/11/2006	Sun	Mon	Tue	Wed	Thu	Fri	Sat					
15			Start	11:00	08:30	08:30	08:30	08:30	08:30	08:30					
16			Stop	17:00	18:00	18:00	18:00	21:00	19:00	19:00					
17		0229 : Birmingham	03/12/2006	Sun	Mon	Tue	Wed	Thu	Fri	Sat					
18			Start	11:00	08:30	08:30	08:30	08:30	08:30	08:30					
19			Stop	17:00	18:00	18:00	18:00	21:00	19:00	19:00					
20		0229 : Birmingham	10/12/2006	Sun	Mon	Tue	Wed	Thu	Fri	Sat					
21			Start	11:00	08:30	08:30	08:30	08:30	08:30	08:30					
22			Stop	17:00	19:00	19:00	19:00	21:00	20:00	20:00					
23		0229 : Birmingham	17/12/2006	Sun	Mon	Tue	Wed	Thu	Fri	Sat					
24			Start	11:00	08:30	08:30	08:30	08:30	08:30	08:30					
25			Stop	17:00	20:00	20:00	20:00	21:00	21:00	21:00					
26		0229 : Birmingham	24/12/2006	Sun	Mon	Tue	Wed	Thu	Fri	Sat					
27			Start	11:00	00:00	09:00	08:30	08:30	08:30	08:30					
28			Stop	17:00	00:00	17:30	18:00	18:00	18:00	18:00					
29		0229 : Birmingham	31/12/2006	Sun	Mon	Tue	Wed	Thu	Fri	Sat					
30			Start	11:00	08:30	08:30	08:30	08:30	08:30	08:30					
31			Stop	17:00	18:00	18:00	18:00	18:00	18:00	18:00					
32		0314 : Witney	Default	Sun	Mon	Tue	Wed	Thu	Fri	Sat					
33			Start	10:30	09:00	09:00	09:00	09:00	09:00	09:00					
34			Stop	16:30	17:30	17:30	17:30	17:30	17:30	17:30					
35		0314 : Witney	10/12/2006	Sun	Mon	Tue	Wed	Thu	Fri	Sat					
36			Start	10:30	09:00	09:00	09:00	09:00	09:00	09:00					
37			Stop	16:30	17:30	17:30	17:30	17:30	20:00	18:00					

Operating Windows window

## Workload

This report displays the number of staff required on a daily basis.

### Running the Report

- To access the **Workload**, click



and then the

- A screen, similar to that below, will be displayed:



	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	<b>Task</b>	<b>Date</b>	<b>Page</b>											
2	0000 : Whole Store	Week 1 02/01/06	1											
3	0000 : Whole Store	Week 2 09/01/06	2											
4	0000 : Whole Store	Week 3 16/01/06	3											
5	0000 : Whole Store	Week 4 23/01/06	4											
6	0000 : Whole Store	Week 5 30/01/06	5											
7	0000 : Whole Store	Week 6 06/02/06	6											
8	0000 : Whole Store	Week 7 13/02/06	7											
9	0000 : Whole Store	Week 8 20/02/06	8											
10	0000 : Whole Store	Week 9 27/02/06	9											
11	0000 : Whole Store	Week 10 06/03/06	10											
12	0000 : Whole Store	Week 11 13/03/06	11											
13	0000 : Whole Store	Week 12 20/03/06	12											
14	0000 : Whole Store	Week 13 27/03/06	13											
15	0000 : Whole Store	Week 14 04/04/06	14											
16	0000 : Whole Store	Week 15 11/04/06	15											
17	0000 : Whole Store	Week 16 18/04/06	16											
18	0000 : Whole Store	Week 17 25/04/06	17											
19	0000 : Whole Store	Week 18 02/05/06	18											
20	0000 : Whole Store	Week 19 09/05/06	19											
21	0000 : Whole Store	Week 20 16/05/06	20											
22	0000 : Whole Store	Week 21 23/05/06	21											
23	0000 : Whole Store	Week 22 30/05/06	22											
24	0000 : Whole Store	Week 23 06/06/06	23											
25	0000 : Whole Store	Week 24 13/06/06	24											
26	0000 : Whole Store	Week 25 20/06/06	25											
27	0000 : Whole Store	Week 26 27/06/06	26											
28	0000 : Whole Store	Week 27 04/07/06	27											
29	0000 : Whole Store	Week 28 11/07/06	28											
30	0000 : Whole Store	Week 29 18/07/06	29											
31														
32														
33														
34														
35														
36														
37														
38														

#### Running the Report window

- It shows the Task on the left hand side of the screen, followed by the Date and the Page it corresponds to, for example, if you wanted to view the information for **Week 28 10/07/2006**, you would select the tab **Page 17** at the bottom of the screen.
- Selecting one of the Page tabs at the bottom of the screen, will display a page similar to that below:

	A	B	C	D	E	F	G	H	I	J	K	L
1	Store Name : Birmingham						Week : 1 08/01/07					
2	Report Title : Target Staffing Report						Period : 2007 Period 2					
3												
4												
5	Staffing Requirement for 0000 : Whole Store											
6		Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday				
7	Time	Required	Required	Required	Required	Required	Required	Required				
8	09:00	14	14	14	14	14	14	16				
9	09:15	14	14	14	14	14	14	16				
10	09:30	14	14	14	14	14	14	16				
11	09:45	14	14	14	14	14	14	16				
12	10:00	14	14	14	14	14	14	16				
13	10:15	14	14	14	14	14	14	16				
14	10:30	14	14	14	14	14	14	16				
15	10:45	14	14	14	14	14	14	16				
16	11:00	14	14	14	14	14	14	16				
17	11:15	14	14	14	14	14	14	16				
18	11:30	14	14	14	14	14	14	16				
19	11:45	14	14	14	14	14	14	16				
20	12:00	15	15	15	15	15	15	17				
21	12:15	15	15	15	15	15	15	17				
22	12:30	15	15	15	15	15	15	17				
23	12:45	15	15	15	15	15	15	17				
24	13:00	15	15	15	15	15	15	17				
25	13:15	15	15	15	15	15	15	17				
26	13:30	15	15	15	15	15	15	17				
27	13:45	15	15	15	15	15	15	17				
28	14:00	15	15	15	15	15	15	17				
29	14:15	15	15	15	15	15	15	17				
30	14:30	15	15	15	15	15	15	17				
31	14:45	15	15	15	15	15	15	17				
32	15:00	15	15	15	15	15	15	17				
33	15:15	14	14	14	14	14	14	17				
34	15:30	14	14	14	14	14	14	17				
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Page 1094 / Page 1095 / Page 1096 / Page 1097 / Page 1098 / Page 1099 / Page 1100 / Page 1101 / Page 1102 / Page 1103 / Page 1104 / Page 1105 / Page 1106 / Page 1107 / Page 1108 / Page 1109 / Page 1110 / Page 1111 / Page 1112 / Page 1113 / Page 1114 / Page 1115 / Page 1116 / Page 1117 / Page 1118 / Page 1119 / Page 1120 / Page 1121 / Page 1122 / Page 1123 / Page 1124 / Page 1125 / Page 1126 / Page 1127 / Page 1128 / Page 1129 / Page 1130 / Page 1131 / Page 1132 / Page 1133 / Page 1134 / Page 1135 / Page 1136 / Page 1137 / Page 1138 / Page 1139 / Page 1140 / Page 1141 / Page 1142 / Page 1143 / Page 1144 / Page 1145 / Page 1146 / Page 1147 / Page 1148 / Page 1149 / Page 1150 / Page 1151 / Page 1152 / Page 1153 / Page 1154 / Page 1155 / Page 1156 / Page 1157 / Page 1158 / Page 1159 / Page 1160 / Page 1161 / Page 1162 / Page 1163 / Page 1164 / Page 1165 / Page 1166 / Page 1167 / Page 1168 / Page 1169 / Page 1170 / Page 1171 / Page 1172 / Page 1173 / Page 1174 / Page 1175 / Page 1176 / Page 1177 / Page 1178 / Page 1179 / Page 1180 / Page 1181 / Page 1182 / Page 1183 / Page 1184 / Page 1185 / Page 1186 / Page 1187 / Page 1188 / Page 1189 / Page 1190 / Page 1191 / Page 1192 / Page 1193 / Page 1194 / Page 1195 / Page 1196 / Page 1197 / Page 1198 / Page 1199 / Page 1200 / Page 1201 / Page 1202 / Page 1203 / Page 1204 / Page 1205 / Page 1206 / Page 1207 / Page 1208 / Page 1209 / Page 1210 / Page 1211 / Page 1212 / Page 1213 / Page 1214 / Page 1215 / Page 1216 / Page 1217 / Page 1218 / Page 1219 / Page 1220 / Page 1221 / Page 1222 / Page 1223 / Page 1224 / Page 1225 / Page 1226 / Page 1227 / Page 1228 / Page 1229 / Page 1230 / Page 1231 / Page 1232 / Page 1233 / Page 1234 / Page 1235 / Page 1236 / Page 1237 / Page 1238 / Page 1239 / Page 1240 / Page 1241 / Page 1242 / Page 1243 / Page 1244 / Page 1245 / Page 1246 / Page 1247 / Page 1248 / Page 1249 / Page 1250 / Page 1251 / Page 1252 / Page 1253 / Page 1254 / Page 1255 / Page 1256 / Page 1257 / Page 1258 / Page 1259 / Page 1260 / Page 1261 / Page 1262 / Page 1263 / Page 1264 / Page 1265 / Page 1266 / Page 1267 / Page 1268 / Page 1269 / Page 1270 / Page 1271 / Page 1272 / Page 1273 / Page 1274 / Page 1275 / Page 1276 / Page 1277 / Page 1278 / Page 1279 / Page 1280 / Page 1281 / Page 1282 / Page 1283 / Page 1284 / Page 1285 / Page 1286 / Page 1287 / Page 1288 / Page 1289 / Page 1290 / Page 1291 / Page 1292 / Page 1293 / Page 1294 / Page 1295 / Page 1296 / Page 1297 / Page 1298 / Page 1299 / Page 1300 / Page 1301 / Page 1302 / Page 1303 / Page 1304 / Page 1305 / Page 1306 / Page 1307 / Page 1308 / Page 1309 / Page 1310 / Page 1311 / Page 1312 / Page 1313 / Page 1314 / Page 1315 / Page 1316 / Page 1317 / Page 1318 / Page 1319 / Page 1320 / Page 1321 / Page 1322 / Page 1323 / Page 1324 / Page 1325 / Page 1326 / Page 1327 / Page 1328 / Page 1329 / Page 1330 / Page 1331 / Page 1332 / Page 1333 / Page 1334 / Page 1335 / Page 1336 / Page 1337 / Page 1338 / Page 1339 / Page 1340 / Page 1341 / Page 1342 / Page 1343 / Page 1344 / Page 1345 / Page 1346 / Page 1347 / Page 1348 / Page 1349 / Page 1350 / Page 1351 / Page 1352 / Page 1353 / Page 1354 / Page 1355 / Page 1356 / Page 1357 / Page 1358 / Page 1359 / Page 1360 / Page 1361 / Page 1362 / Page 1363 / Page 1364 / Page 1365 / Page 1366 / Page 1367 / Page 1368 / Page 1369 / Page 1370 / Page 1371 / Page 1372 / Page 1373 / Page 1374 / Page 1375 / Page 1376 / Page 1377 / Page 1378 / Page 1379 / Page 1380 / Page 1381 / Page 1382 / Page 1383 / Page 1384 / Page 1385 / Page 1386 / Page 1387 / Page 1388 / Page 1389 / Page 1390 / Page 1391 / Page 1392 / Page 1393 / Page 1394 / Page 1395 / Page 1396 / Page 1397 / Page 1398 / Page 1399 / Page 1400 / Page 1401 / Page 1402 / Page 1403 / Page 1404 / Page 1405 / Page 1406 / Page 1407 / Page 1408 / Page 1409 / Page 1410 / Page 1411 / Page 1412 / Page 1413 / Page 1414 / Page 1415 / Page 1416 / Page 1417 / Page 1418 / Page 1419 / Page 1420 / Page 1421 / Page 1422 / Page 1423 / Page 1424 / Page 1425 / Page 1426 / Page 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/ Page 1511 / Page 1512 / Page 1513 / Page 1514 / Page 1515 / Page 1516 / Page 1517 / Page 1518 / Page 1519 / Page 1520 / Page 1521 / Page 1522 / Page 1523 / Page 1524 / Page 1525 / Page 1526 / Page 1527 / Page 1528 / Page 1529 / Page 1530 / Page 15												

#### Report window

5. Clicking on other Page tabs, at the bottom of the screen, will display information for other dates.

## PMC Report

1. To access the **PMC Report**, click



and then the

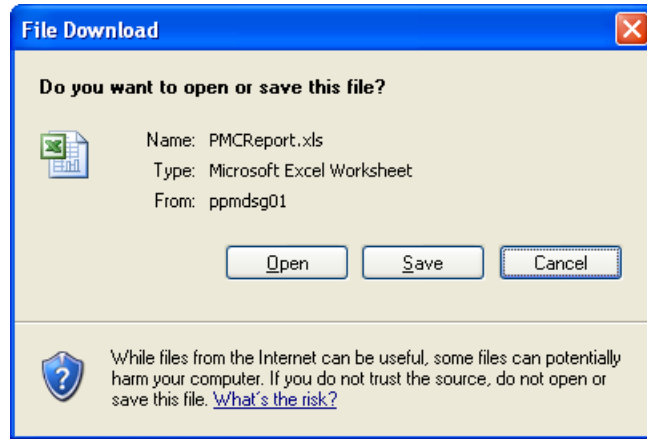
2. A screen, similar to the one below, will be displayed:

### Generate a Report window

3. If the **Store** selection, at the top of the screen, is incorrect, see the **Changing the Store** section below for further information on changing the store.
4. Tick the relevant time period and then click **Generate**.

## Viewing the Report

1. Once you click **Generate**, the following window will be displayed:




2. File Download window
3. Clicking on **Open** will display the report, for the specified period.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1															
2															
3															
4															
5															
6															
7															
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9															
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19															
20															
21															
22															
23															
24															
25															
26															
27															
28															

PMC Report				
Store Name	Birmingham			
Store Number	1229			
Region		Store Trading Information		
Area	Enterprise			
Group	Region 1			
Week	Week 49 04/12/06			
Model Number	Global Model			
Model Name				
FORECAST INFORMATION				
Budget Sales	£0.00			
Store PI	100.00	By Role		
STORE INFORMATION				
	Drivers	Hours		
Store Matrix		Target	PI	Allowed FTE
MANAGEMENT				
Admin & Management			100.00	
Cash Procedures			100.00	
MANAGEMENT			100.00	
STORE				
Shop			100.00	
STORE			100.00	
CUSTOMER SERVICE				
Checkout			100.00	
CUSTOMER SERVICE			100.00	

PMC Report window

## Changing the Store

1. To change the Store, click .
2. A screen, similar to that below, will be displayed:

**Search**

Search For:  ☒ All ☐ Store ☐ Store Link ☐ Region ☐ Store Group  
No search

**Filter**

**Store Links** ☒ All (8 Store Links)

**Regions** ☒ All (563 Regions)

**Store Groups** ☒ All (3 Store Groups)

**Forecast Cost Models**  
001 - Default  
**Work Standards Models**  
Small  
Medium  
Large  
Food Market Store  
PFS Store

Food  
Region 1  
Area 1  
Area 2  
Area 3  
Area 4  
Area 5  
Area 6

Food Market Store  
Large  
Medium  
Small

Store	Forecast Cost Model	Region	Store Group
There are more than 100 items in the list. Select a filter to reduce the number of items or click here to show them			

1749 stores

OK Cancel

## Changing the Store window

### Search

1. To locate a specific location in the system, type in a name or part of a name, into the **Search For** field. For example, Typing **New** would display the stores Newport, Newcastle etc in the **Store** section at the bottom of the screen.
2. Results can be made more specific, by clicking in the circular box next to the appropriate level for example, To search for a store, type in the name and then click in the box next to the text **Store**.

### Filter

1. The Filters allow you to narrow down the list of Stores which are displayed, to make it easier to select the relevant ones. For example, In the screen below, if I clicked on **Area 1**, in the middle box, only those Stores assigned to Area 1, would be displayed in the Stores section of the screen.

If I also clicked on **Medium**, in the right hand box, then only those Medium Stores in Area 1 would be displayed.

**Filter (remove)**

**Store Links** ☐ All (9 Store Links)

**Regions** ☒ All (41 Regions)

**Store Groups** ☒ All (4 Store Groups)

**Forecast Cost Models**  
001 - Default  
**Work Standards Models**  
Small  
Medium  
Large  
Food Market Store  
PFS Store

Food  
Region 1  
Area 1  
Area 2  
Area 3  
Area 4  
Area 5  
Area 6

Food Market Store  
Large  
Medium  
Small

### Filter window

2. To remove any Filters which have been applied, click **Remove** link, found next to the **Filter** heading **Filter (remove)**.

## Store

1. The Store section will not display more than 100 results. To display stores, you will need to adjust the filters above to reduce the number of stores to display.
2. The number of Stores currently available to view, can be found in the bottom left hand corner of the screen.

Store	Forecast Cost Model	Region	Store Group
1229 : Birmingham	001 : Default	Area 1	Medium
1323 : Witney	001 : Default	Area 2	Medium
0786 : Alcester	001 : Default	Area 3	Medium
0564 : Stratford	001 : Default	Area 4	Medium
1212 : Evesham	001 : Default	Area 4	Medium
1311 : Cheltenham	001 : Default	Area 5	Medium
0755 : Worcester	001 : Default	Area 5	Medium

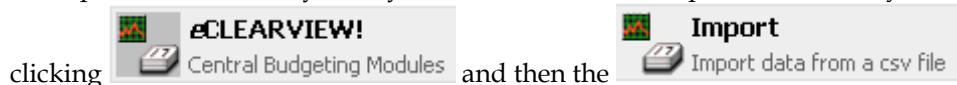
61 stores

## Store window

3. Once the correct company is located, click applicable name and it will become highlighted.
4. Click **OK** to confirm the selection and return to the previous screen.

## Import

1. To Import data into the system, you need to access the Import area of the system by



2. A screen, similar to the one below, will be displayed:

The image shows the Torexretail Administrator interface. The top bar includes the Torexretail logo, the title 'Administrator', the date 'Week 44 : 26 November 2006', and buttons for 'Import', 'Home', and 'Log off'. A list of modules is displayed on the left, including Store Models, Trading Profiles, Raw Trading Profiles, Trading Profiles Weeks, Test Date Format, Ancillary Minutes, Number of Mainbank, Home Delivery Driver Minutes, Non Food Minutes, Home Entertainment, Fresh Milk %, Items By Checkout Main/Kiosk, Public Toilet Flag, Trolley Flag Settings, Dept Lift Data, News Items %, Lottery %, EFT/CASH Splits, BWS Licensing, Home Deliveries per Week, Basket Size, Number of Lines, and Store Area. Below the list, there is a 'Select Forecast' dropdown menu set to 'Report 1', a 'Verbose mode' checkbox, a 'Select file to import' text box with a 'Browse...' button, and a 'Do Import' button with an 'Import' label.

## Import window

3. Select the appropriate Import file type from the list, by clicking in the circular box next to the name.

---

**Note:** The list in the screenshot above may differ from what appears on your screen.

---

4. Choose the relevant Forecast from the **Select Forecast** list.
5. Ticking the **Verbose mode** box will enable more detailed information to be captured in the log files for this process. Whilst this can be useful, it could impact the speed at which the Import is completed and will increase the file size of each log.
6. To select the Import file, click **Browse**, next to the **Select file to import** field.
7. A screen, similar to that below, will be displayed:



**Choose File window**

8. Locate the file, both select it and click **Open** or double click file.
9. You will be returned to the previous screen and the location of the file will be in the **Select file to import** field.
10. When ready, click **Import**.
11. A screen, similar to that below, will be displayed. It shows the status of the Import process. Clicking **Refresh** will update the information on screen.

**Torexretail** Administrator Week 44 : 26 November 2006 Home Log off

**Import**  
 Importing  
**Progress ...**  
 Last Row Parsed: -1  
 Last Row Processed: -1  
 Data to be committed  
 See log file on server for details:  
 Refresh

#### Refresh window

12. Once the process is complete, you will be returned to the **Import** screen.

## Timesheet Hours Import

This functionality provides users with the ability to import actual weekly timesheet hours provided at a 'sub-department' level into ePerformance tasks, which can then be used for KPI reporting purposes.

1. You must first run the import in order to create the associated INI file. To do this go to **eClearview > Import**, select the **Timesheet Hours** radio button and the file you wish to import and click **Import** – nothing will be imported at this stage, however
2. Now set up a new System Metric by navigating to **Advanced > Table Editors > Global** descriptions, select the **SYSTEM METRICS** file and click **Edit**
3. Enter a suitable name and make a note of the **ID** number associated with it, then click **OK** to save
4. Now go to **Advanced > Generic configuration editors > Global configuration**, select the file **Timesheet Hours.INI** and click **Edit**
5. Under the **[CONFIG]** section, enter the ID number of the System Metric which you just created
6. Under the **[SUBDEPTMAPPINGS]** section, enter the ID numbers of the ePerformance tasks that you want the 'sub-departments' to be associated with (to see the ID numbers go to **Advanced > Department & Task Configuration > Task descriptions**)
7. The application is now ready to import Timesheet Hours. Return to **eClearview > Import** and follow the same process as above to proceed

---

## Store Hours Import

This functionality provides users with the ability to import data from a KPI report into a reference table.

1. First export a KPI report to excel. Then open the excel report, and save as a CSV file. The report will then be in the correct format for importing into ePerformance.
2. Navigate to **eClearview > Import**, select the **Store Hours Import** radio button and the file you wish to import and click **Import**.
3. The data in the import file will now be imported into a reference table called Store Hours. This will contain a different effective date for each week included in the import file.

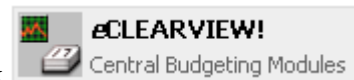
## System Metrics RHRP Data Import


This functionality provides users with the ability to import RHRP data which has been exported from the Performance application, into ePerformance.

1. You must first export the data from Performance into a CSV file
2. Then navigate to **eClearview > Import**, select the **RHRP Import** radio button and the file you wish to import and click **Import**.
3. The data in the file will now be imported into the associated System Metrics, which can be viewed on a KPI report

## Assign Stores

1. To access the Assign Stores area of the system, click



followed by the  **Assign Stores**.

2. A screen, similar to the one below, will be displayed:



### Assign Stores window

## Search

1. In the **Type** drop down menu, select the relevant information search for.
2. Select the correct store from the **Store** drop down menu.
3. Enter the date that you want to search **From**.
4. Enter the date that you want to search **To**.
5. Clicking **Search** will display all of the results on the right hand side of the screen.
6. Ticking the **Auto Update** box, eliminates the need to click **Search**, if any of the information is changed. It will automatically detect the change and initiate the search.

## New Assignment

### Single Store

1. To create a single store assignment, either click **Create a new assignment for this store** link on the left hand side of the screen or click **New** at the bottom of the screen.
2. A screen, similar to that below, will be displayed:

## Add New Assignment for Birmingham : 1001

<input checked="" type="checkbox"/> Budget Forecast:	Budget for Birmingham, week 23/10/06
<input checked="" type="checkbox"/> Manager Forecast:	Manager for Birmingham, week 27/11/06
<input checked="" type="checkbox"/> Target Forecast:	Target for Birmingham, week 27/11/06
<input checked="" type="checkbox"/> Actual Forecast:	Target for Birmingham, week 30/04/06
<input checked="" type="checkbox"/> Forecast Cost Model:	001 : Default
<input checked="" type="checkbox"/> Work Standards Model:	Global Model
<input checked="" type="checkbox"/> Commodity Group Pattern:	Normal
<input checked="" type="checkbox"/> Trading Profile Pattern:	Normal

☒ From: ☒ To: 

OK

Cancel

## Single Store window

3. To select a different Assignment for each option, ensure they are ticked on the left hand side of the screen.
4. Click drop down menu, next to each option and click relevant choice.
5. Enter a **From** and **To** date, if applicable.
6. Click **OK** to save or **Cancel** to disregard any changes made.

## Multiple Stores

1. To add assignments to multiple stores at the same time, click **Make an assignment for multiple stores** link on the left hand side of the screen.
2. A screen, similar to that below, will be displayed:

**Search**

Search For:  ☒ All ☐ Store ☐ Store Link ☐ Region ☐ Store Group

No search

---

**Filter** (remove)

**Store Links** ☐ All (9 Store Links) **Regions** ☒ All (41 Regions) **Store Groups** ☒ All (4 Store Groups)

**Forecast Cost Models**

001 : Default

**Work Standards Models**

Small  
Medium  
Large  
Food Market Store  
PFS Store

**Food**

Region 1  
Area 1  
Area 2  
Area 3  
Area 4  
Area 5  
Area 6

**Food Market Store**

Large  
Medium  
Small

Store	Forecast Cost Model	Region	Store Group
There are more than 100 items in the list. Select a filter to reduce the number of items or click here to show them.			

498 stores

OK Cancel

## Multiple Stores window

### Search

1. To locate a specific location in the system, type in a name or part of a name, into the **Search For** field. For example, Typing **New** would display the stores Newport, Newcastle etc in the **Store** section at the bottom of the screen.
2. Results can be made more specific, by clicking in the circular box next to the appropriate level for example, to search for a store, type in the name and then click in the box next to the text **Store**.

### Filter

1. The Filters allow you to narrow down the list of Stores which are displayed, to make it easier to select the relevant ones. For example, In the screen below, if I clicked on **Area 1**, in the middle box, only those Stores assigned to Area 1, would be displayed in the Stores section of the screen.

If I also clicked on **Medium**, in the right hand box, then only those Medium Stores in Area 1 would be displayed.

**Filter** (remove)

**Store Links** ☐ All (9 Store Links) **Regions** ☒ All (41 Regions) **Store Groups** ☒ All (4 Store Groups)

**Forecast Cost Models**

001 : Default

**Work Standards Models**

Small  
Medium  
Large  
Food Market Store  
PFS Store

**Food**

Region 1  
Area 1  
Area 2  
Area 3  
Area 4  
Area 5  
Area 6

**Food Market Store**

Large  
Medium  
Small

### Filter window

2. To remove any Filters which have been applied, click **Remove** link, found next to the **Filter** heading **Filter** (remove).

## Store

1. The Store section will not display more than 100 results. To display stores, you will need to adjust the filters above to reduce the number of stores to display.
2. The number of Stores currently available to view, can be found in the bottom left hand corner of the screen.

Store	Forecast Cost Model	Region	Store Group
1229 : Birmingham	001 : Default	Area 1	Medium
1323 : Witney	001 : Default	Area 2	Medium
0786 : Alcester	001 : Default	Area 3	Medium
0564 : Stratford	001 : Default	Area 4	Medium
1212 : Evesham	001 : Default	Area 4	Medium
1311 : Cheltenham	001 : Default	Area 5	Medium
0755 : Worcester	001 : Default	Area 5	Medium

61 stores

## Store window

### Selected Stores





Once you have the selected stores displayed in the **Store** section, you can move them into the **Selected Stores** section.

Store	Forecast Cost Model	Region	Store Group		Selected Stores
1229 : Birmingham	001 : Default	Area 1	Medium	>	
1323 : Witney	001 : Default	Area 2	Medium	>>	
0786 : Alcester	001 : Default	Area 3	Medium	<	
0564 : Stratford	001 : Default	Area 4	Medium	<<	
1212 : Evesham	001 : Default	Area 4	Medium		
1311 : Cheltenham	001 : Default	Area 5	Medium		
0755 : Worcester	001 : Default	Area 5	Medium		

61 stores

OK Cancel

### Selected Stores window

1. To move a single or multiple stores to the **Selected Stores** area, click on each required store and click . They will be displayed on the right hand side of the screen.
2. To move **ALL** stores to the **Selected Stores** area, click . All of the stores will be displayed on the right hand side of the screen.
3. If you make a mistake and want to move a single or multiple store from the Selected Stores area, click on each required store and then click .
4. If you want to move ALL stores from the Selected Stores area, click .
5. Once all of the stores are selected, click **OK**.
6. The **Add Assignments** screen will then be displayed. This works in the same way as adding assignments for a single store, but the settings are applied to all of the previously selected stores.

Torexretail

Administrator

Week 48 : 27 November 2006

Assign Stores

Home

Log off

Add Assignments for Multiple Stores

☒ Budget Forecast:
 

Target for Birmingham, week 07/05/06

☒ Manager Forecast:
 

Target for Birmingham, week 30/04/06

☒ Target Forecast:
 

Target for Birmingham, week 30/04/06

☒ Actual Forecast:
 

Target for Birmingham, week 30/04/06

☒ Forecast Cost Model:
 

001 : Default

☒ Work Standards Model:
 

Global Model

☒ Commodity Group Pattern:
 

B.H. Monday

☒ Trading Profile Pattern:
 

B.H. Monday

☒ From:

☒ To:

OK

Cancel

## Add Assignments window

### Edit an Assignment

1. To edit an assignment, search for it using the **Search** section of the screen. (See Page 173 for further information).
2. The results will be displayed on the right hand side of the screen.
3. Click relevant assignment and it will change color.
4. Either click **Edit the selected assignment** link on the left hand side of the screen or click **Edit** at the bottom of the screen.
5. You will then be able to change the value of the assignment.
6. Click **OK** to confirm or **Cancel** to disregard any changes.


### Delete an Assignment

1. To delete an assignment, search for it, using the **Search** section of the screen. (See Page 173 for further information).
2. The results will be displayed on the right hand side of the screen.
3. Click relevant assignment and it will change color.
4. Either click **Delete the selected assignment** link on the left hand side of the screen or click **Delete** at the bottom of the screen.
5. You will be asked if you are sure you want to **Delete selected assignment?** If you are, click **OK**, otherwise, click **Cancel**.


---

## Configuration

### About ePerformance

1. To view licensing information for the system, click  **About ePerformance** .
2. Further information about this screen can be found on page 301.

### Table Editors

1. To view the Table Editors, click  **Table editors** .  
Configure description tables .
2. Further information on this screen can be found on page 301.

### Generic Configuration Editors

1. To view the Generic Configuration Editors, click  **Generic configuration editors** .  
Configure ini-file style options .
2. Further information on this screen can be found on page 312.

### Tree Editors

1. To view the Tree Editors, click  **Tree editors** .  
Configure hierarchy trees and store listing .
2. Further information on this screen can be found on page 314.


### Department & Task Configuration

1. To view the Department & Task Configuration screen, click  **Department & Task Configuration** .  
Configure department and task list and descriptions .
2. Further information on this screen can be found on page 316.

### Module Configuration Editors


1. To view the Module Configuration Editors, click  **Module configuration editors** .  
Configure options for specific areas of functionality .
2. Further information on this screen can be found on page 319.

### User Configuration


1. To view the User Configuration Screen, click  **User configuration** .  
Configure user list and user groups options .
2. Further information on this screen can be found on page 340.

---


## Import Clockings

1. To view the Import Clockings screen, click  **Import Clockings**.
2. Further information on this screen can be found on page 347.


## Template Info

1. To view the Template Info screen, click  **Template Info**.
2. Further information on this screen can be found on page 348.


## Record Lock Admin

1. To view the Record Lock Admin screen, click  **Record Lock Admin**.
2. Further information on this screen can be found on page 349.


## File System

1. To view the File System screen, click  **File System**.
2. Further information on this screen can be found on page 350.


## Task Managers

1. To view the Task Managers screen, click  **Task Managers**.
2. Further information on this screen can be found on page 351.


## Message Log

1. To view the Message Log screen, click  **Message Log**.
2. Further information on this screen can be found on page 352.

## Store Groups

1. To view the Store Groups screen, click  **Store Groups**.
2. Further information on this screen can be found on page 353.

## Select Fileset

1. To view the Select Fileset screen, click  **Select Fileset**.
2. Further information on this screen can be found on page 353.





# Scheduling

1. To access the Scheduling area of the system, log on as normal and click



The ePerformance Scheduler can be individually configured to suit each customer. This is done via a set of weightings which determine how important different aspects are when optimizing solutions. The aspects of each solution that will be taken into consideration are as follows:

- Need Skilled – Where a solution leaves the number of skilled employees (i.e. not apprentices) scheduled to a task below the workload
- Working When No Work (Jobless) – Where a solution places an employee on a task which is closed (outside of operating windows)
- Closure – Where a solution causes a task closure (i.e. staffing has fallen below minimum levels)
- Apprentice – Where a solution places an apprentice on a task
- Overs – Where a solution causes a task to have more employees working on it than the workload requires
- Unders – Where a solution causes a task to have less employees working on it than the workload requires
- Skilled – This is the skill level of the employee, as defined in the Tasks section of the employees HR record
- Priority – This is the priority of the secondary task for the employee, as defined in the Tasks section of the employees HR record

The weightings are set in the configuration file **SCHEDULE WEIGHTING.INI**, the higher the weighting the more important the scheduler will consider it to avoid. For example, setting Unders = 20 and Overs = 10, will make Unders twice as undesirable as Overs. Therefore if the scheduler generates 2 solutions, one which includes 5 periods of Unders and the other with 5 periods of Overs, then the second solution will be chosen as it will have generated a lower score.

There are two sets of weightings, one which applies to the employees' primary task and one which applies to all secondary tasks. A priority percentage can also be applied to the secondary task (which will increase the score of the secondary task by a set percentage) to take into account the fact that the primary task is more important. Therefore if there are two identical solutions, then the one applying to the primary task will be chosen as it will generate a lower score.

Note that where a solution is generated which includes a closure then it will also include an underlying under. Where a solution includes a period of no work it will also include an underlying over, so you may wish to keep the weightings for closure and no work low.

## Schedule Rerun



### Schedule Rerun

Rerun run schedules for the week.

1. To begin a Schedule Rerun, click
2. A screen, similar to that below, will be displayed:

**Torexretail Administrator** Week 32 1 04 November 2007 [Home](#) [Log off](#)

**Departments & Tasks**

### Re-run Schedule

**Options**

☒ Clean Build ☐ Locked Changes ☐ Locked Roster

**Selected Employees**

Harris, S	<input type="checkbox"/>	<input type="checkbox"/>
Haynes, J	<input type="checkbox"/>	<input type="checkbox"/>
Haynes, L	<input type="checkbox"/>	<input type="checkbox"/>
Hill, K	<input type="checkbox"/>	<input type="checkbox"/>
Hodnott, D	<input type="checkbox"/>	<input type="checkbox"/>
Hollyoak, J	<input type="checkbox"/>	<input type="checkbox"/>
Howe, A	<input type="checkbox"/>	<input type="checkbox"/>
Hughes, E	<input type="checkbox"/>	<input type="checkbox"/>
Hughes, E	<input type="checkbox"/>	<input type="checkbox"/>
Hughes, J	<input type="checkbox"/>	<input type="checkbox"/>
Hughes, S	<input type="checkbox"/>	<input type="checkbox"/>
Hughes, T	<input type="checkbox"/>	<input type="checkbox"/>
Hussain, S	<input type="checkbox"/>	<input type="checkbox"/>
Jackson, J	<input type="checkbox"/>	<input type="checkbox"/>
Jarvis, P	<input type="checkbox"/>	<input type="checkbox"/>
Johnson, A	<input type="checkbox"/>	<input type="checkbox"/>
Jones, C	<input type="checkbox"/>	<input type="checkbox"/>
...	<input type="checkbox"/>	<input type="checkbox"/>

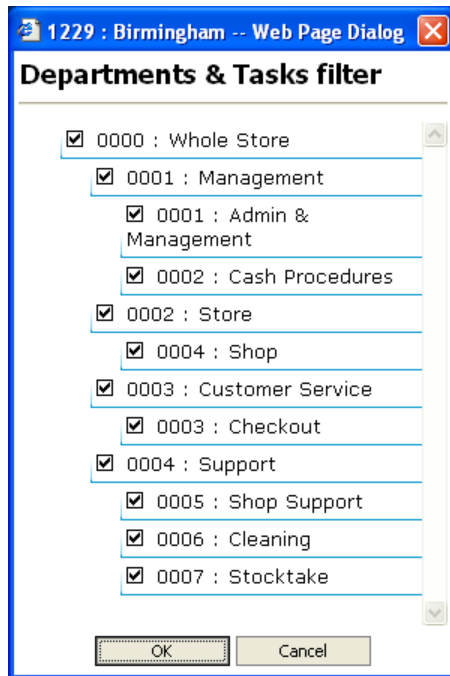
**Re-run Schedule Operating Windows**

	00:00	01:00	02:00	03:00	04:00	05:00	06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00
Sun																								
Mon																								
Tue																								
Wed																								
Thu																								
Fri																								
Sat																								

[Reschedule](#)

### Re-run Schedule window

3. The screen lists the names of all members of staff, who work at the store. Click in the tick box, next to the appropriate name to select them, or click in the tick box at the top of the list to select all employees.
4. At the top of the screen are the 3 rescheduling options: Clean Build will fully re-optimize the schedule of the selected employee(s). Locked changes will do as clean build, but will also retain all edits that have been made to the selected employee(s) schedule. Locked Roster will retain the start/stop times of each shift for the selected employee(s). The Clean Build and Locked Changes options are mutually exclusive whilst the Locked Roster function can be selected with either of the other two.
5. The Schedule Rerun window can be seen at the bottom of the screen. This can be configured so that rescheduling can only take place at certain times of the day. Any requests that are made outside of the window will be set to pending and will commence as soon as the window becomes active again (for more information on this see 'Schedule Window Config' in the Advanced section)
6. Clicking **Departments & Tasks** link, on the left hand side of the screen, will display a window, similar to that below:



**Departments & Tasks Filter window**

7. Ticking and unticking the boxes allows you to limit or increase the number of staff displayed on screen at once, for example, ticking the **Management** box would only show those members of staff who are assigned to the Management department.
8. When all of the appropriate employees are selected, click **Reschedule**. A screen, similar to that below will be displayed. It will show the user the currently running task(s) as well as any which are pending or have been completed. If logged on as a manager of a particular store the user will only be able to see completed requests from their home store. Pending and running requests include those from other stores to enable the user to understand the relative position of their requests in the queue.

Torexretail

Administrator

Week 32 : 04 November 2007

Home

Log off

Departments & Tasks

Schedule Status

Running (1)

Abort	Site	Type	Week start	Number of weeks	Clean build	Cap to budget	Re-run	User	Requested	Started	Finished	Elapsed time	Run time	Host
<input type="checkbox"/>	1298 : BIRMINGHAM	Contract	04/11/07	1	Yes	N/A	Yes	Administrator	Tue Nov 06 17:24:37 GMT+00:00 2007	Tue Nov 06 17:24:37 GMT+00:00 2007		5,589 sec	5,518 sec	TALC-001376

Completed (1)

Site	Type	Week start	Number of weeks	Clean build	Cap to budget	Re-run	User	Requested	Started	Finished	Elapsed time	Run time	Host
1298 : BIRMINGHAM	Contract	27/01/08	1	Yes	N/A	No	Administrator	Tue Nov 06 13:09:36 GMT+00:00 2007	Tue Nov 06 13:09:36 GMT+00:00 2007	Tue Nov 06 13:12:29 GMT+00:00 2007	2m 52,901 sec	2m 52,844 sec	TALC-001376

Re-run Schedule Operating Windows

	00:00	01:00	02:00	03:00	04:00	05:00	06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00
Sun																								
Mon																								
Tue																								
Wed																								
Thu																								
Fri																								
Sat																								

Abort

Home

Schedule Status window

## Schedule Window Status

Schedule Window Status

View contents of next Schedule Window

- To view the Schedule Window Status, click
- A screen, similar to that below, will be displayed:

184

## Schedule Status

Running (1)

Abort	Site	Type	Week start	Number of weeks	Clean build	Cap to budget	Re-run	User	Requested	Started	Finished	Elapsed time	Run time	Host
<input type="checkbox"/>	1229 : Birmingham	Schedule	08/01/07	1	No	Yes	No	Administrator	Thu Jan 11 11:45:06 GMT 2007	Thu Jan 11 11:45:11 GMT 2007		14.000 sec	8.692 sec	laptop-001193

Abort

## Schedule Rerun Windows

	00:00	01:00	02:00	03:00	04:00	05:00	06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00
Mon																								
Tue																								
Wed																								
Thu																								
Fri																								
Sat																								
Sun																								

## Schedule Status window

3. The screen displays any Schedules, currently being processed by the system.
4. To cancel a running process, click appropriate tick box, under the **Abort** column.
5. Click **Abort**.
6. A message will be displayed which asks Are **you sure you wish to cancel the selected schedules?** Click on **OK** to confirm or **Cancel** to allow the process to continue.

## Schedule Go



## Schedule Go

Manually generate schedule plans for the week

1. To view the Schedule Go screen, click
2. A screen, similar to that below, will be displayed:

Torexretail

Administrator

Week 3 : 15 January 2007

Schedule Go

Home

Log off

Departments & Tasks

Links

View last run Contract Schedule

View last run Schedule

View last run Action Schedule

Schedule Action

Schedule Task Manager

Schedule Administrator

Fileset

Birmingham - 1229

Run contract schedule

Run standard schedule

Run action schedule

Clean build

Cap to budget

Run

Completed (2)

Site	Type	Week start	Number of weeks	Clean build	Cap to budget	Re-run	User	Requested	Started	Finished	Elapsed time	Run time	Host
1229 : Birmingham	Contract	02/01/06	1	Yes	Yes	No	Administrator	Wed Jan 17 12:18:21 GMT 2007	Wed Jan 17 12:18:21 GMT 2007	Wed Jan 17 12:18:25 GMT 2007	4.466 sec	4.376 sec	laptop-001193
1229 : Birmingham	Schedule	02/01/06	1	Yes	Yes	No	Administrator	Wed Jan 17 12:18:21 GMT 2007	Wed Jan 17 12:18:25 GMT 2007	Wed Jan 17 12:27:53 GMT 2007	9m 32.693 sec	9m 28.117 sec	laptop-001193

Abort

Home

Schedule Administrator window

## Running a Schedule

1. Select the appropriate **Fileset** from the list
2. Tick which kind of schedule you want to run for example, **Contract**, **Standard** or **Action**.
3. If you want any current schedules to be removed and replaced with this new one, tick the **Clean build** tick box.
4. To ensure the system generates a schedule which keeps the schedule to the set budget, tick the **Cap to budget** tick box.
5. When ready, click **Run**.

## Aborting a Schedule

1. Click **Abort**, next to the appropriate schedule.

### Links

#### View last run Contract Schedule

1. Clicking link **View last run Contract Schedule** will display summary information on the last Contract Schedule to be run by the system
2. Click link **return to Schedule Go**, in the top left hand corner, to return to the previous screen.

#### View last run Schedule

1. Clicking link **View last run Schedule** will display summary information on the last Schedule to be run by the system

2. Click link **return to Schedule Go**, in the top left hand corner, to return to the previous screen.

#### View last run Action Schedule

1. Clicking link **View last run Contract Schedule**, will display summary information on the last Contract Schedule to be run by the system
2. Click link **return to Schedule Go**, in the top left hand corner, to return to the previous screen.

#### Schedule Action

1. See this document for further information on using this screen.

#### Schedule Task Manager

1. Clicking link **Schedule Task Manager**, will display the **Background Task Administrator**. It shows any Schedules which are currently running or have been completed.

**Torexretail** Administrator Week 1 : 02 January 2006 Task Managers Home Log off

**Background Task Administrator**

Abort All

SCHEDULE OTP CLOCKPOLLING CLEARVIEW SYSTEM

**Running (1)**

Abort	Desc	Created	Started	Finished	Elapsed	Running Time	Host
Abort	Schedule for 3:38717	2007-01-17 12:18:21.107	2007-01-17 12:18:25.683		3m 44.874 sec	3m 40.298 sec	laptop-001193

**Completed (1)**

Desc	Created	Started	Finished	Elapsed	Running Time	Host
Contract for 3:38717	2007-01-17 12:18:21.077	2007-01-17 12:18:21.167	2007-01-17 12:18:25.543	4.466 sec	4.376 sec	laptop-001193

..... UNHE. 0-110305  
Phase#1 optimisation, Truman, Frank : 111  
\*\*\*..... time: 0.922 sec  
Phase#1 optimisation, Jones, Patrick : 107  
\*..... time: 0.691 sec  
Phase#1 optimisation, Fowler, Robert : 105  
... time: 0.180 sec  
Phase#1 optimisation, Jenkins, Pauline : 106  
\* time: 0.200 sec  
Phase#1 optimisation, Crenshaw, Pat : 104  
\*\*\*\*\* time: 19.388 sec  
Phase#1 optimisation, Mitchell, John : 103  
\* time: 1.622 sec  
Phase#1 optimisation, Thomas, Ian : 101  
\*\*..... time: 2m 13.613 sec  
Phase#1 optimisation, Smith, Katie : 102

hide messages disable scroll Refresh Home

**Torexretail**

#### Background Task Administrator window



2. To stop a task from running, click **Abort**, next to the appropriate item or the **Abort All** at the top of the screen.
3. Information on what is currently being processed is displayed in the bottom half of the screen. To disable this information, click **hide messages** link at the bottom of the screen.
4. To stop the information from automatically updating, click **disable scroll** link.

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## Schedule (Plan) Validation and Alerts


The system can provide warnings where specific employment rules are broken or alerts are required. The application and various threshold values for outputting the warnings are configurable. The warnings relate to:

1. Weekly Hours – overtime and average working week hours
2. Overtime Payments – where extra hours result in overtime payment
3. Breaks – minimum break periods when working more than a certain number of hours
4. Daily Rest Periods – minimum time between shifts
5. Weekly Rest Periods – minimum rest periods in a week

If any rule generates an alert after running or editing a schedule/employee plan, a message will be generated the top of the screen. The symbol alongside the message will either be  or  and the rule in which the symbol is generated will have been pre-configured.

The symbol depends on whether you can ignore the validation or whether you need to deal with the issue before continuing:

 This symbol is a **warning**, advising that a rule has been breached. The issue can be resolved or the schedule can be saved by ignoring the warning, it is advisory only.

 This rule is an **error**, advising that a rule has been breached. You cannot save the schedule unless you resolve the issue.

## Recruitment

1. To view the recruitment screen, click



## Recruitment

1. To view the Recruitment screen, click



2. A screen, similar to that below, will be displayed:



## Recruitment Planner

Mode: Greenfield

☒ Re-optmise incremental shifts

Run for 1 week(s)

## Completed (1)

Site	Type	Week start	Number of weeks	Clean build	Cap to budget	Re-run	User	Requested	Started	Finished	Elapsed time	Run time	Host
1229 : Birmingham	Recruitment	05/02/07	1	Yes	Yes	No	Administrator	Wed Feb 07 09:08:58 GMT 2007	Wed Feb 07 09:08:59 GMT 2007	Wed Feb 07 09:09:00 GMT 2007	1.883 sec	1.502 sec	laptop-001193

Abort

Home

## Recruitment Planner window

3. Select the Mode from the list for example, is it a new store (**Greenfield**) or an existing one (**Increment**). ( note; this option is not available on all systems).
4. Select the number of weeks to run the planner for. Be aware that this process can take an extended amount of time, depending on the number of weeks selected. (note, this option is not available on all systems).
5. Click **Run**.
6. A progress screen, similar to that below, will be displayed subject to the Recruitment Schedule Window allowing the task to be executed at the requested time.

## Recruitment statistics

Task	CONTRACT1
0006 : Cleaning	
0005 : Shop Support	
0004 : Shop	
0003 : Checkout	
0002 : Cash Procedures	
0001 : Admin & Management	
Completed	<div><div></div></div> 100%

Refresh | Return | Home

## Recruitment Statistics window

7. Click **Refresh** to update the progress on screen.
8. Click **Return** to return to the previous screen.
9. Click **Home** to return to the menu.

## Recruitment Schedule Window

1. To configure periods that indicate to the system when it is possible to execute a requested recruitment schedule, click **Recruitment Schedule Window Configuration**
2. A screen, similar to that below, will be displayed:

## Recruitment Schedule Window Configuration

Clicking on a cell will toggle the time period between active and inactive states.  
Consecutive active time periods comprise a Schedule Window.

	00:00	01:00	02:00	03:00	04:00	05:00	06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00
Sun																								
Mon																								
Tue																								
Wed																								
Thu																								
Fri																								
Sat																								

Save | Cancel

## Recruitment Schedule window

3. Click on a cell to toggle the time period between active and inactive states. A green cell indicates an hour that a recruitment schedule can be executed by the task manager.

## Recruitment Options



### Recruitment Options

Configure the recruitment scheduler.

1. To view the Recruitment Options screen, click
2. A screen, similar to that below, will be displayed:

StoreGroup	Task	AUTOPROPORTION	CONTRACT1	Delete ?
Default Group	0003 : Checkout	<input type="checkbox"/>	35.00	<input type="checkbox"/>


OK Cancel New

#### Edit Item window

#### Add a New Item

1. To add a new item, click **New**.
2. Enter the applicable information and click **OK** to save or **Cancel** to disregard.

#### Edit an Item

1. To edit an item in the list, click  icon, to the left hand side of the relevant item.
2. Make any applicable changes and click **OK** to save and confirm the changes or **Cancel** to disregard.

#### Delete an Item

1. To delete an item from the list, tick the **Delete?** box, next to the relevant item.
2. Click **OK**, at the bottom of the screen.
3. You will be asked **Are you sure you want to delete the selected items?** Click on **OK** to confirm or **Cancel** to disregard.

## Recruitment Statistics



### Recruitment Statistics

Recruitment Scheduler Statistics.

1. To view the Recruitment Statistics screen, click
2. A screen, similar to that below, will be displayed:

**Torexretail** Administrator Week 6 : 05 February 2007 Recruitment Statistics Home Log off

**Recruitment Statistics Report**

Task	CONTRACT 1
0006 : Cleaning	
0005 : Shop Support	
0004 : Shop	
0003 : Checkout	
0002 : Cash Procedures	
0001 : Admin & Management	

Select format

 Preview

 Excel

 PDF

Torexretail

### Recruitment Statistics Report window

#### Output to a Web Page



1. To simply view the report, click icon.
2. The report will be displayed in the current window:

## Recruitment Statistics

### 0001 : Management

Task	Fulltime	20 hrs am	20 hrs pm	16 hrs am	16 hrs pm	12 hrs am	12 hrs pm	4 hrs
0001 : Admin & Management	0	0	0	0	0	0	0	0
0002 : Cash Procedures	0	0	0	0	0	0	0	0
<b>Totals:</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

### 0002 : Store

Task	Fulltime	20 hrs am	20 hrs pm	16 hrs am	16 hrs pm	12 hrs am	12 hrs pm	4 hrs
0004 : Shop	0	0	0	0	0	0	0	0
<b>Totals:</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

### 0003 : Customer Service

Task	Fulltime	20 hrs am	20 hrs pm	16 hrs am	16 hrs pm	12 hrs am	12 hrs pm	4 hrs
0003 : Checkout	0	0	0	0	0	0	0	0
<b>Totals:</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

### 0004 : Support

Task	Fulltime	20 hrs am	20 hrs pm	16 hrs am	16 hrs pm	12 hrs am	12 hrs pm	4 hrs
0005 : Shop Support	0	0	0	0	0	0	0	0
0006 : Cleaning	0	0	0	0	0	0	0	0
<b>Totals:</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>

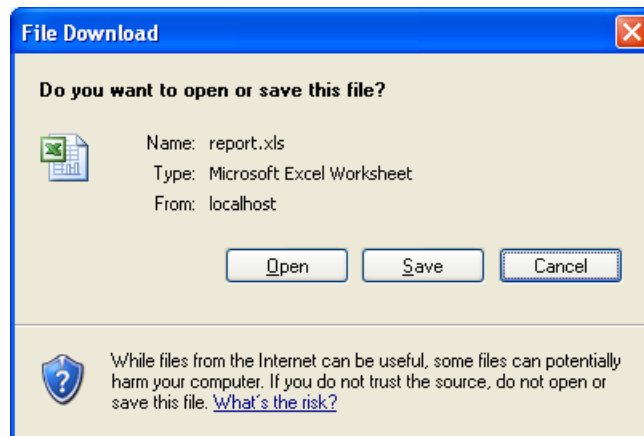
[end]

7-Feb-2007

## Recruitment Statistics window

## Output to Excel

1. To view or save the report as a Microsoft Excel file, click  icon.
2. A Window will be displayed:



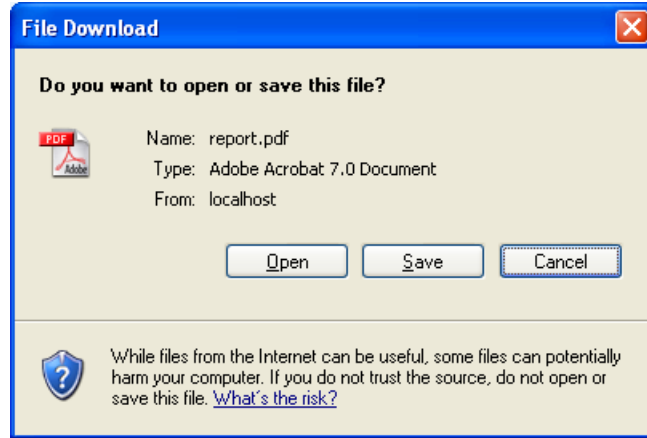
## File Download window

3. Click **Open** to open the report into Excel.
4. Click **Save** to specify a location to save the generated report.
5. Click **Cancel** to close the window and return to the previous screen.

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## Output to PDF


1. To view or save the report as an Adobe Acrobat PDF format, click  icon.
2. A window will be displayed:



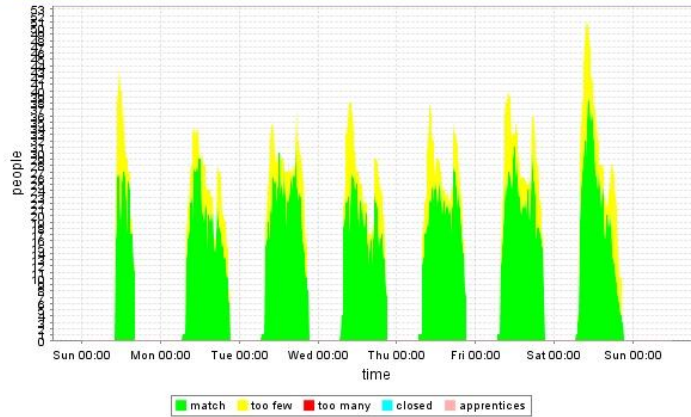
### File Download window

3. Click **Open** to open the report into Acrobat.
4. Click **Save** to specify a location to save the generated report.
5. Click **Cancel** to close the window and return to the previous screen.

## Recruitment Fit

1. To view the Recruitment Fit graph, click  **Recruitment Fit** See a graph comparing recruitment plans to workload.
2. A screen, similar to that below, will be displayed:

Departments &amp; Tasks



More detail...

### Recruitment Fit window

3. To view a separate graph for each department, click **More Detail...** link at the bottom of the page.

## Recruitment Schedule Report

1. To view the Recruitment Schedule Report, click



### Recruitment Schedule Report

Departmental schedule listing report

2. A screen, similar to that below, will be displayed:

## Department Recruitment Schedule Report

Store Name : 1229 : Birmingham

Week2 : 04/02/07

## 0001 : Management / Svision

Employee	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Total
0001 : Management(1) 38.75, number1 Template		08:00 12:45		11:15 20:15	08:45 18:30	08:00 17:45	09:15 19:00	38.75
0001 : Management(2) 39.00, number1 Template	10:30 16:30	08:45 18:30	08:15 18:00			09:15 19:00	09:00 16:30	39.00
0001 : Management(3) 38.50, number1 Template	11:15 16:30		10:00 19:45	10:30 20:15	10:30 20:15		08:00 15:45	38.50
0001 : Management(4) 32.00, number1 Template		12:00 21:00	11:15 19:45		12:45 19:45	08:45 15:15	08:45 12:45	32.00
0027 : Checkout Spvn(54) 39.00, number1 Template		08:00 17:45	08:00 17:45	08:00 15:45	08:00 15:45	08:00 15:30		39.00
0027 : Checkout Spvn(55) 29.75, number1 Template	10:30 16:30			15:45 21:00	15:45 21:00	15:30 21:00	08:00 17:45	29.75
Totals	16.50	30.00	33.75	29.00	36.25	35.75	35.75	217.00

## 0002 : Cust Services

Employee	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Total
0002 : Checkouts(24) 38.75, number1 Template		11:00 20:30	08:00 17:45	17:15 21:15	08:30 18:15	09:00 18:45		38.75
0002 : Checkouts(25) 39.00, number1 Template			09:45 19:30	08:45 18:30	09:30 17:15	09:15 19:00	10:15 16:00	39.00
0002 : Checkouts(26) 39.00, number1 Template	10:30 16:30	09:15 19:00	09:30 19:15			08:45 18:30	09:45 17:15	39.00
0002 : Checkouts(27) 39.00, number1 Template	10:30 16:30			09:15 19:00	09:45 19:30	10:15 20:00	08:15 15:45	39.00
0002 : Checkouts(28) 39.00, number1 Template		11:30 21:00	10:00 19:45		09:30 19:15	09:00 17:45	08:45 14:15	39.00
0002 : Checkouts(29) 39.00, number1 Template	10:45 16:00		09:00 18:45	10:30 20:15	10:45 20:30		08:45 17:30	39.00

Export

Print

Home

## Department Recruitment Schedule Report window

3. To export the report to Adobe Acrobat PDF format, click **Export**.
4. To print the report, click **Print**.

## Recruitment Daily Shifts Report

1. To view the Recruitment Daily Shifts Report, click

**Recruitment Daily Shifts Report**

Daily shifts report

2. A screen, similar to that below, will be displayed:



Week2 : 04/02/07

Torexretail

Torexretail

- Torexretail

## Torexretail

Torexretail



- Torexretail

### Schedule repair function

The schedule repair function restores contracted time to schedules that have previously been adjusted for absence.

Previous versions of the software punched holes in schedules during absence times. New functionality requires schedules to be 'fully formed', adjusted plans are generated when the plan is loaded.

Select fileset:

### Schedule Repair Function window

3. Either select an individual store from the list or select **All Stores**.
4. Click **Go** and the system will perform the task automatically. Be aware that this process could take some time, depending on the number of stores selected.

## Schedule Export

Currently, when you edit an employee plan in the **Shift Editor**, the information is retained within the system. The **Schedule Export** functionality allows you extract any new or updated employee plan information, for use in other 3<sup>rd</sup> party applications.

There are 3 types of **Schedule Export**, which can be run:

- Autorun
- Automatic mode
- Controlled mode

The **Autorun** option cannot be manually run by the user. The system can be configured to export the required information at a pre-defined time. Speak to your Torex Retail Account Manager for further information regarding the implementation of this option.

**Automatic mode** will export the information, using pre-defined criteria, for all stores, for the current week, to the system default folder. This option must be manually started, see the **Running an Export** section later in the document, for further information.

**Controlled mode** performs in the same way as **Automatic mode**, except that you are able to select single or multiple stores and the week start. This option must also be manually started, see the **Running an Export** section later in the document, for further information.

When the export process is started, the system will check if any employee plans have been updated or absences recorded, since the last export has been run. If they have, the information is exported as an XML file, the contents of which conform to the HR-XML standard. The export will only extract information for changes to pre-defined tasks. If an employee is no longer working on any of the defined tasks, any changes made will not be exported.

In all cases, the XML file will be generated in the background. Once complete, it will be copied in to the system default folder. The default file name will follow the structure **planexport{yyyyMMddHHmmss}.xml** for example, planexport20060816160902.xml. This date/time prefix will correspond to the timestamp of when the export occurred. This ensures that each export file will have a unique filename. This filename format can be configured if requested.


When the export is taking place, the system will check each record to ascertain which information has been updated or created. Only this updated information will be exported from the system, into the XML file.


## Running an Export

### Automatic Mode

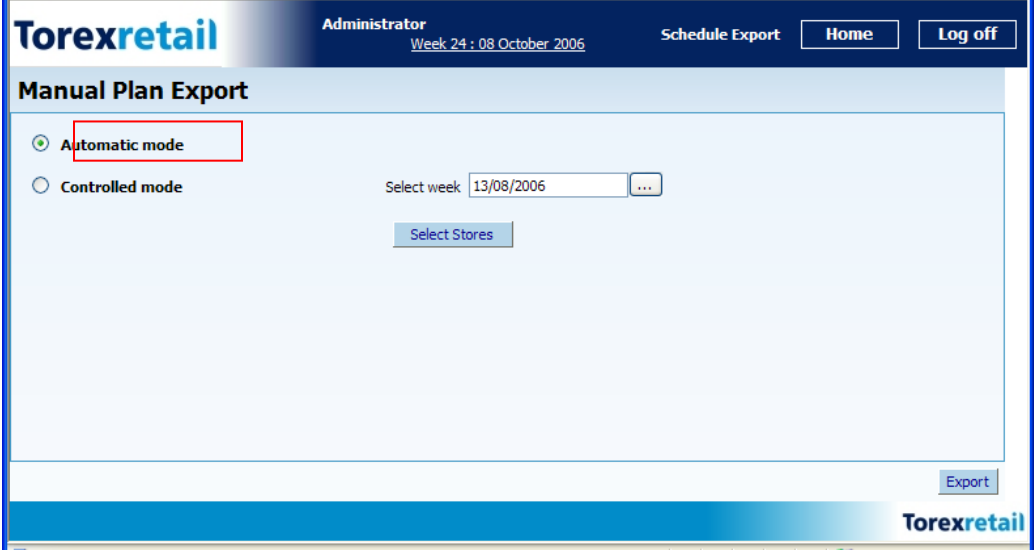
To extract the default information, pre-configured for your system, follow the steps below:

1. Log into the software as usual.

2. Click  **Scheduling**  
Generate schedules

3. Then click  **Schedule Export**  
Export schedules

4. Ensure **Automatic mode** is selected, as shown below:




### Automatic Mode window


5. Click **Export**.
6. If any Employee plans have been added or modified, an XML file will be exported to your default system location.

## Controlled Mode

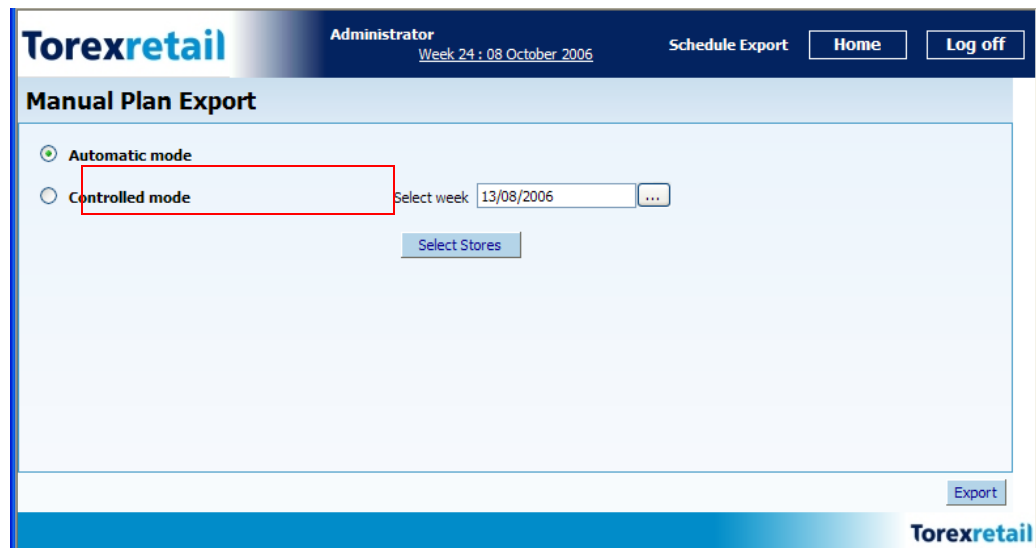
To extract the default information, pre-configured for your system, follow the steps below:

1. Log into the software as usual.


2. Click  **Scheduling**  
Generate schedules

3. Then click  **Schedule Export**  
Export schedules





4. Ensure **Controlled mode** is selected, as shown below:



### Controlled Mode window

5. To select a week, either:
  - Type in the relevant date into the  field (the date will default to the 1<sup>st</sup> day of the current week) or
  - Click  and click date.
6. To select a single/multiple stores:
  - Click **Select Stores**. A screen, similar to the one below, will be displayed:

#### Search window

- You can use the **Search** or **Filter** facility to reduce the number of stores to select.
- When you have a list of stores, you can left click required stores and they will become highlighted.
- Use the arrow buttons to move individual / multiple stores to the **Selected Stores** list. For example,
  -  will move the highlighted store(s) into the **Selected Stores** list.
  -  will move ALL of the stores into the **Selected Stores** list.
  -  will remove the highlighted store(s) from the **Selected Stores** list.
  -  will remove ALL of the stores from the **Selected Stores** list.
- Once the list of **Selected Stores** is complete, click **OK**.

7. Click **Export**.

8. If you click **Export** without selecting any stores, a message will be displayed in the top left hand corner of the screen asking you to **Please select one or more stores for export**.

#### Manual Plan Export window

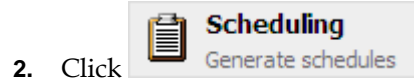
9. If any Employee plans have been added or modified, an XML file will be exported to your default system location.

## Diary Messages

When changes are made to an employee's plan, information is communicated to the **Diary**. The **Diary** will then display warning messages, to inform the user of the export status.

To access the **Diary** and view the messages:

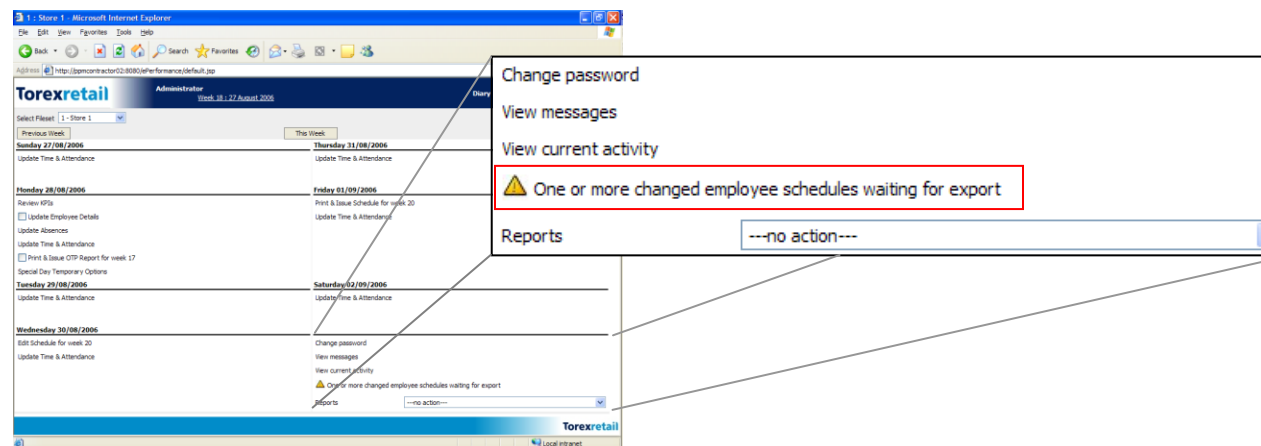
1. Log into the software as usual.



## Pre-Export

A message will be displayed in the current users' diary stating that **One or more changed employee schedules waiting for export**.

This informs you that changes have been made to an employee's plan, but the export has not yet been run. Clicking triangular exclamation mark icon will take you to the **Schedule Edit** screen, where you can view the changes.

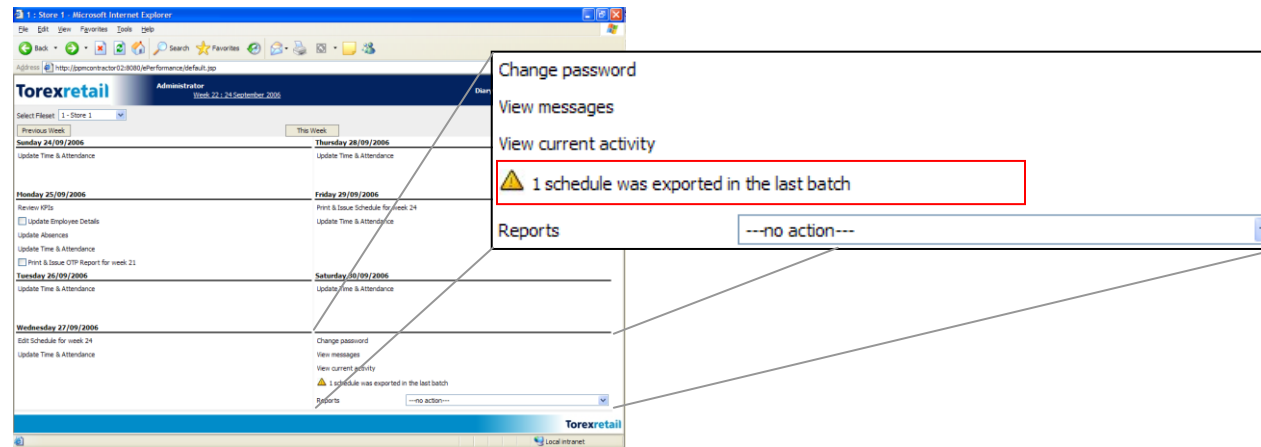


Pre-Export window

## Post Export

A message will be displayed in the current users' diary stating that **x schedule was exported in the last batch**. X represents the number of employee plans.

This informs you that changes have been made to an employee's plan and the export has been run. Clicking triangular exclamation mark icon will take you to the **Schedule Edit** screen, where you can view the changes.



## Post Export window

## Shift Editor (Compare with Actuals)

1. To access the Shift Editor and compare the information with the actuals, click



2. A screen, similar to that below, will be displayed:

Torexretail

Administrator

Week 3 : 15 January 2007

Schedule Edit

Log off

	Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Sunday		Schedule	Actual
Name	Start	Stop	Start	Stop	Start	Stop	Start	Stop	Start	Stop	Start	Stop	Start	Stop		
<input type="radio"/> Crenshaw, Pat							07:00	12:15	07:00	12:45	12:45	18:30	08:45	18:30	26.00	0.00
<input type="radio"/> Evans, Dorothy	15:00	20:00	15:00	23:00			15:00	23:00							20.00	0.00
<input type="radio"/> Fowler, Robert	07:00	15:00	07:00	15:00	07:00	15:00	07:00	15:00	07:00	15:00					37.50	0.00
<input type="radio"/> Hobbs, Gareth	15:00	17:45			15:00	20:45			07:00	12:45	07:00	12:45			20.00	0.00
<input type="radio"/> Jenkins, Pauline	07:00	09:00	07:00	09:00	07:00	13:30	07:00	15:00	07:00	15:00					25.00	0.00
<input type="radio"/> Jones, Patrick	07:00	15:00			15:00	23:00			15:00	23:00	15:00	23:00	07:00	15:00	37.50	0.00
<input type="radio"/> Mitchell, John	07:00	09:00			07:00	09:00	07:00	15:00	08:45	18:30	10:00	19:45			30.00	0.00
<input type="radio"/> Phillips, Sonja					07:00	09:00	07:00	09:00	12:15	14:15	07:00	14:00	15:00	23:00	20.00	0.00
<input type="radio"/> Powell, Grant	20:00	22:00			09:00	11:00	08:45	16:00	08:45	18:30					20.00	0.00
<input type="radio"/> Slater, Emma	07:00	09:00	07:00	09:00	07:00	09:00	07:00	09:00	07:00	09:00	07:00	09:00	07:00	09:00	14.00	0.00
<input type="radio"/> Smith, Katie	07:00	10:00	07:00	16:45	07:00	16:45	08:45	18:30	08:45	18:30					40.00	0.00
<input type="radio"/> Smith, Ryan			07:00	09:45					13:00	22:45	07:00	16:30	07:00	11:00	25.00	0.00
<input checked="" type="radio"/> Thomas, Ian	07:00	10:30	07:00	16:45	07:00	16:45	13:45	23:00	12:45	22:30					40.00	0.00
<b>Schedule Totals</b>	37.25		40.25		53.25		64.00		84.25		45.75		30.25		<b>355.00</b>	
<b>Actual Totals</b>	0.00		0.00		0.00		0.00		0.00		0.00		0.00			<b>0.00</b>
<b>Difference</b>	37.25		40.25		53.25		64.00		84.25		45.75		30.25		355.00	

Add New:

Task filter...

HR filter...

Toggle graph

Toggle Dept. view

Reschedule

Last week

Next week

Compare with:

OK

Cancel

Apply

Print

Clear Week

Clear Selected Days

Copy Actual

Cut

Copy

Paste...

☒ Auto Calc Breaks

## Shift Editor window

- By default, this screen compares the Scheduled hours to the Actual hours worked.
- For further information on using this screen, see page 229.

## Shift Editor (Compare with Contract)

- To access the Shift Editor and compare the information with the contract, click



- A screen, similar to that below, will be displayed:



	Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Sunday		Schedule	Contract
Name	Start	Stop	Start	Stop	Start	Stop	Start	Stop	Start	Stop	Start	Stop	Start	Stop		
<input type="radio"/> Crenshaw, Pat							07:00	12:15	07:00	12:45	12:45	18:30	08:45	18:30	26.00	30.00
<input type="radio"/> Evans, Dorothy	15:00	20:00	15:00	23:00			15:00	23:00							20.00	20.00
<input type="radio"/> Fowler, Robert	07:00	15:00	07:00	15:00	07:00	15:00	07:00	15:00	07:00	15:00					37.50	37.50
<input type="radio"/> Hobbs, Gareth	15:00	17:45			15:00	20:45			07:00	12:45	07:00	12:45			20.00	20.00
<input type="radio"/> Jenkins, Pauline	07:00	09:00	07:00	09:00	07:00	13:30	07:00	15:00	07:00	15:00					25.00	25.00
<input type="radio"/> Jones, Patrick	07:00	15:00			15:00	23:00			15:00	23:00	15:00	23:00	07:00	15:00	37.50	37.50
<input type="radio"/> Mitchell, John	07:00	09:00			07:00	09:00	07:00	15:00	08:45	18:30	10:00	19:45			30.00	30.00
<input type="radio"/> Phillips, Sonja					07:00	09:00	07:00	09:00	12:15	14:15	07:00	14:00	15:00	23:00	20.00	20.00
<input type="radio"/> Powell, Grant	20:00	22:00			09:00	11:00	08:45	16:00	08:45	18:30					20.00	20.00
<input type="radio"/> Slater, Emma	07:00	09:00	07:00	09:00	07:00	09:00	07:00	09:00	07:00	09:00	07:00	09:00	07:00	09:00	14.00	14.00
<input type="radio"/> Smith, Katie	07:00	10:00	07:00	16:45	07:00	16:45	08:45	18:30	08:45	18:30					40.00	40.00
<input type="radio"/> Smith, Ryan			07:00	09:45					13:00	22:45	07:00	16:30	07:00	11:00	25.00	25.00
<input type="radio"/> Thomas, Ian	07:00	10:30	07:00	16:45	07:00	16:45	13:45	23:00	12:45	22:30					40.00	40.00
<b>Schedule Totals</b>	37.25		40.25		53.25		64.00		84.25		45.75		30.25		<b>355.00</b>	
<b>Contract Totals</b>	45.50		58.50		55.00		74.25		84.75		39.00		2.00			<b>359.00</b>
<b>Difference</b>	-8.25		-18.25		-1.75		-10.25		-0.50		6.75		28.25			<b>-4.00</b>

Add New:

☒ Auto Calc Breaks

**Shift Editor window**

- By default, this screen compares the Scheduled hours to the Contracted hours worked.
- For further information on using this screen, see page 229.

**Shift Editor (Employee Plan - Compare with Contract)**

- To edit an employee plan and compare it with their contracted hours, click

**Shift Editor**

Manually edit an employee plan (Compare with contract).

- A screen, similar to that below, will be displayed:

**Torexretail**
Administrator  
Week 3 : 15 January 2007

Schedule Edit Detail

Log off

Editing Schedule for Crenshaw, Pat

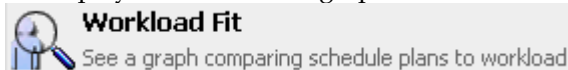
Schedule	Contract
<input type="checkbox"/> Monday	
	<div>0001 : Admin &amp; Management 07:00</div> <div>Finish 09:00</div>
0.00	2.00
<input type="checkbox"/> Tuesday	
	<div>0001 : Admin &amp; Management 07:00</div> <div>Finish 09:00</div>
0.00	2.00
<input type="checkbox"/> Wednesday	
0.00	0.00
<input type="checkbox"/> Thursday	
<div>0001 : Admin &amp; Management 07:00</div> <div>Tea Break 09:15</div> <div>0001 : Admin &amp; Management 09:30</div> <div>Finish 12:15</div>	<div>0001 : Admin &amp; Management 07:00</div> <div>Tea Break 08:45</div> <div>0001 : Admin &amp; Management 09:00</div> <div>Tea Break 11:45</div> <div>0001 : Admin &amp; Management 12:00</div> <div>Meal Break 12:30</div> <div>0001 : Admin &amp; Management 13:00</div> <div>Finish 15:00</div>
5.25	7.50
<input type="checkbox"/> Friday	

#### Shift Editor window

- By default, this screen compares an employee's Scheduled hours to their Contracted hours.
- This screen operates in the same way as the **T&A Edit** screen. The only difference is that you can select the employee at the bottom of the screen.
- For further information on using this screen, see page 229

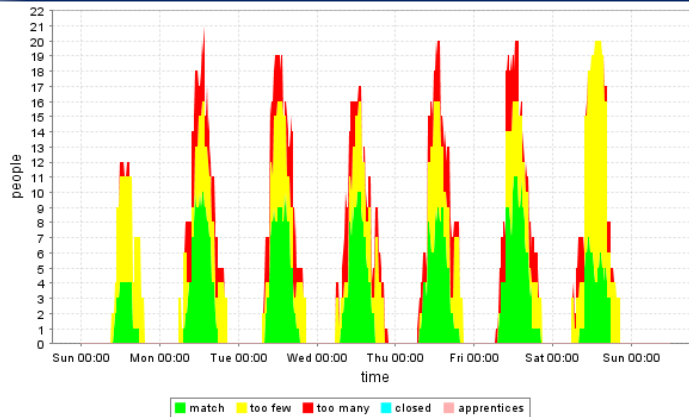
## Workload Fit

- To display a Workload Fit graph, click



- A screen, similar to that below, will be displayed:

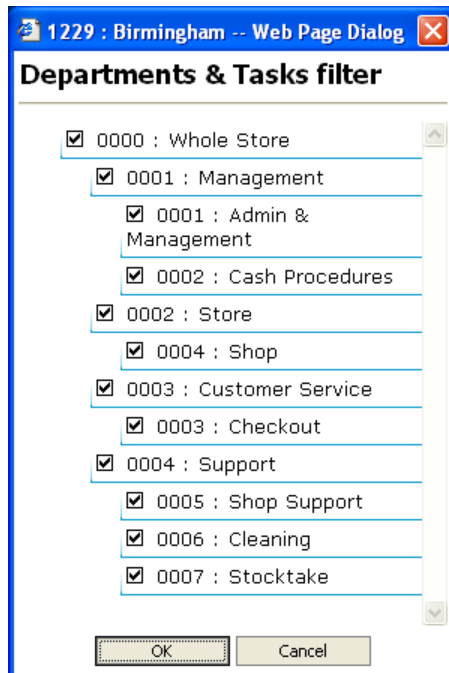
## Departments &amp; Tasks



More detail...

## Workload Fit window

3. Moving your cursor over each color, will display text, explaining what it represents.
4. Clicking **More Detail...** option, at the bottom of the screen, will display a separate graph for each department, under the original graph.
5. Clicking **Departments & Tasks** link, in the top left hand corner of the screen, will display a window, similar to that below:



Departments &amp; Tasks Filter window

6. This screen allows you to alter the number of departments and tasks which are displayed in the graph. Unticking a department for example, **Management**, would remove it from the graph, altering its structure.

## Contract Fit

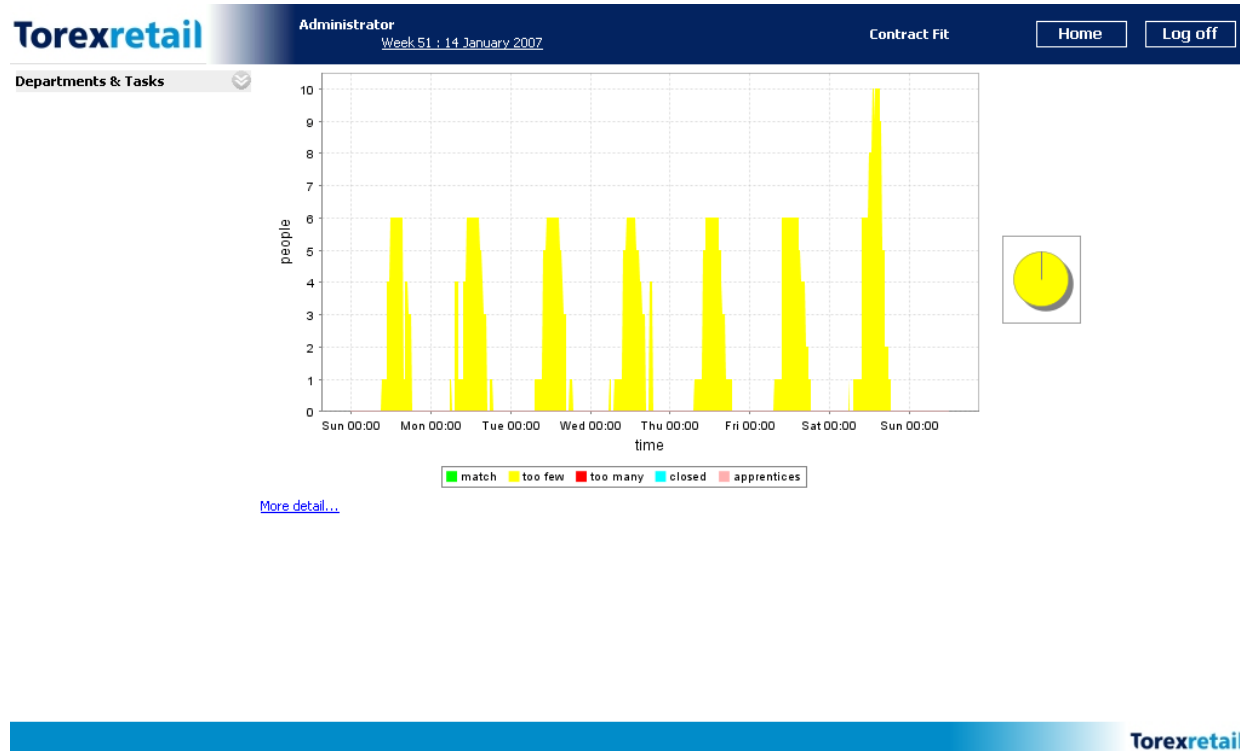
1. To display a Contract Fit graph, click



**Contract Fit**

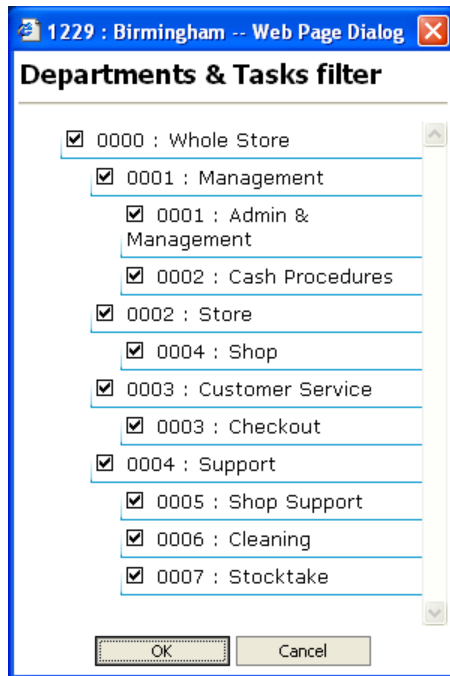
See a graph comparing contract plans to workload .

2. A screen, similar to that below, will be displayed:



### Contract Fit window

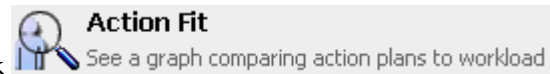
3. Moving your cursor over each color, will display text, explaining what it represents.
4. Clicking **More Detail...** option, at the bottom of the screen, will display a separate graph for each department, under the original graph.
5. Clicking **Departments & Tasks** link, in the top left hand corner of the screen, will display a window, similar to that below:



**Departments & Tasks Filter window**

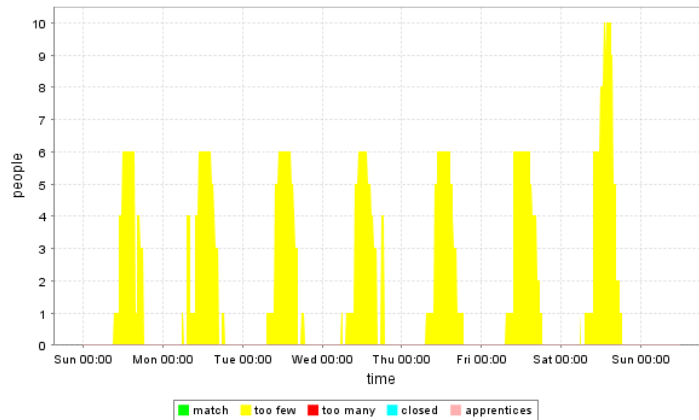
6. This screen allows you to alter the number of departments and tasks which are displayed in the graph. Unticking a department for example, **Management**, would remove it from the graph, altering its structure.

## Action Fit



1. To display an Action Fit graph, click
2. A screen, similar to that below, will be displayed:

## Departments &amp; Tasks



More detail...

## Action Fit window

3. Moving your cursor over each color, will display text, explaining what it represents.
4. Clicking **More Detail...** option, at the bottom of the screen, will display a separate graph for each department, under the original graph.
5. Clicking **Departments & Tasks** link, in the top left hand corner of the screen, will display a window, similar to that below:

1229 : Birmingham -- Web Page Dialog

### Departments & Tasks filter


- ☒ 0000 : Whole Store
  - ☒ 0001 : Management
    - ☒ 0001 : Admin & Management
    - ☒ 0002 : Cash Procedures
  - ☒ 0002 : Store
    - ☒ 0004 : Shop
  - ☒ 0003 : Customer Service
    - ☒ 0003 : Checkout
  - ☒ 0004 : Support
    - ☒ 0005 : Shop Support
    - ☒ 0006 : Cleaning
    - ☒ 0007 : Stocktake

OK Cancel

## Departments &amp; Tasks Filter window

- This screen allows you to alter the number of departments and tasks which are displayed in the graph. Unticking a department for example, **Management**, would remove it from the graph, altering its structure.

## Simplified Plan Editor (New Schedule /Shift Editor)

Select the  toggle button to view the Plan Editor either by Department or by Employees (in alphabetical order)

Sample Store : Sample Store - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://localhost:8080/ePerformance/default.jsp

Google

Administrator Week 46 : 12 November 2007 Schedule Editor Log off

Compare with: Contract

Name	Monday		Tuesday		View by department (OFF)		Thursday		Friday		Saturday		Sunday		Schedule	Contract
	Start	Stop	Start	Stop	Start	Stop	Start	Stop	Start	Stop	Start	Stop	Start	Stop		
Belshaw, Sharon	09:30	14:00	09:30	14:00	09:30	14:00	09:30	14:00	09:30	14:00					22.50	22.50
Bentley, Frank			19:00	23:00	06:00	10:00	06:00	10:00	06:00	10:00	19:00	23:00			20.00	0.00
Blake, Marguer...									18:00	23:00					5.00	5.00
Brown, Max	14:00	23:00	14:00	18:00	14:00	23:00	14:00	18:00	14:00	18:00			09:00	18:00	37.50	37.50
Clarke, Karen	06:00	10:00	06:00	10:00					15:00	19:00	15:00	19:00	15:00	19:00	20.00	0.00
Clarke, Matilda	14:00	18:00	14:00	18:00	14:00	18:00	14:30	18:30					19:00	23:00	20.00	0.00
Connor, David	18:00	23:00	18:00	22:00							06:00	15:00			17.50	0.00
Crouch, Mary	17:45	23:00									13:45	23:00			14.00	14.00
Cunningham, Martin	18:00	23:00					18:00	23:00					09:00	18:00	18.50	18.50
Dempsey, Maisie					18:00	23:00					18:00	23:00			10.00	10.00
Foster, Carlos					14:30	18:30			16:30	20:30			15:00	19:00	12.00	0.00
Harper, Jane	09:30	13:30	09:30	13:30	09:30	13:30	09:30	13:30	09:30	13:30					20.00	20.00
Harris, Olivia	18:00	23:00			18:00	23:00					15:00	23:00			17.50	17.50
Hunt, Leanne	12:00	17:00	12:00	18:00	06:00	14:00	12:00	18:00	12:00	17:00					29.00	29.00
Johns, Jennifer	08:30	15:00	08:30	15:00	08:30	15:00	08:30	15:00	08:30	15:00					31.25	31.25

### Simplified Plan Editor window

This view is by employee – the ‘View by Department’ toggle button is off

Sample Store : Sample Store - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://localhost:8080/ePerformance/default.jsp

Google

**Torexretail** Administrator Week 46 : 12 November 2007 Schedule Editor Log off

Compare with: Contract

Name	Monday		Tuesday		View by department (ON)		Thursday		Friday		Saturday		Sunday		Schedule	Contract
	Start	Stop	Start	Stop	Start	Stop	Start	Stop	Start	Stop	Start	Stop	Start	Stop		
0001 : Management (click to view)																
0002 : Customer Service (click to view)																
0003 : Store (click to view)																
0004 : Store Support (click to view)																
0005 : Specialist (click to view)																

### View by Employee window

This view is by Department – the ‘View by Department’ toggle button is on

Sample Store : Sample Store - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address http://localhost:8080/ePerformance/default.jsp

Google

**Torexretail** Administrator Week 46 : 12 November 2007 Schedule Editor Log off

Compare with: Contract

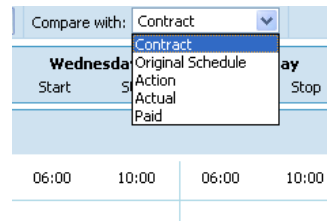
Name	Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Sunday		Schedule	Contract
	Start	Stop	Start	Stop	Start	Stop	Start	Stop	Start	Stop	Start	Stop	Start	Stop		
0001 : Management																
Click here to show/hide this department			19:00	23:00	06:00	10:00	06:00	10:00	06:00	10:00	19:00	23:00			20.00	0.00
Clarke, Karen	06:00	10:00	06:00	10:00					15:00	19:00	15:00	19:00	15:00	19:00	20.00	0.00
Clarke, Matilda	14:00	18:00	14:00	18:00	14:00	18:00	14:30	18:30					19:00	23:00	20.00	0.00
Schedule Totals		8.00		12.00		8.00		8.00		8.00		8.00		8.00	60.00	
Contract Totals		0.00		0.00		0.00		0.00		0.00		0.00		0.00		0.00
Difference		8.00		12.00		8.00		8.00		8.00		8.00		8.00		60.00
0002 : Customer Service (click to view)																
0003 : Store (click to view)																
0004 : Store Support (click to view)																
0005 : Specialist (click to view)																

### View by Department window



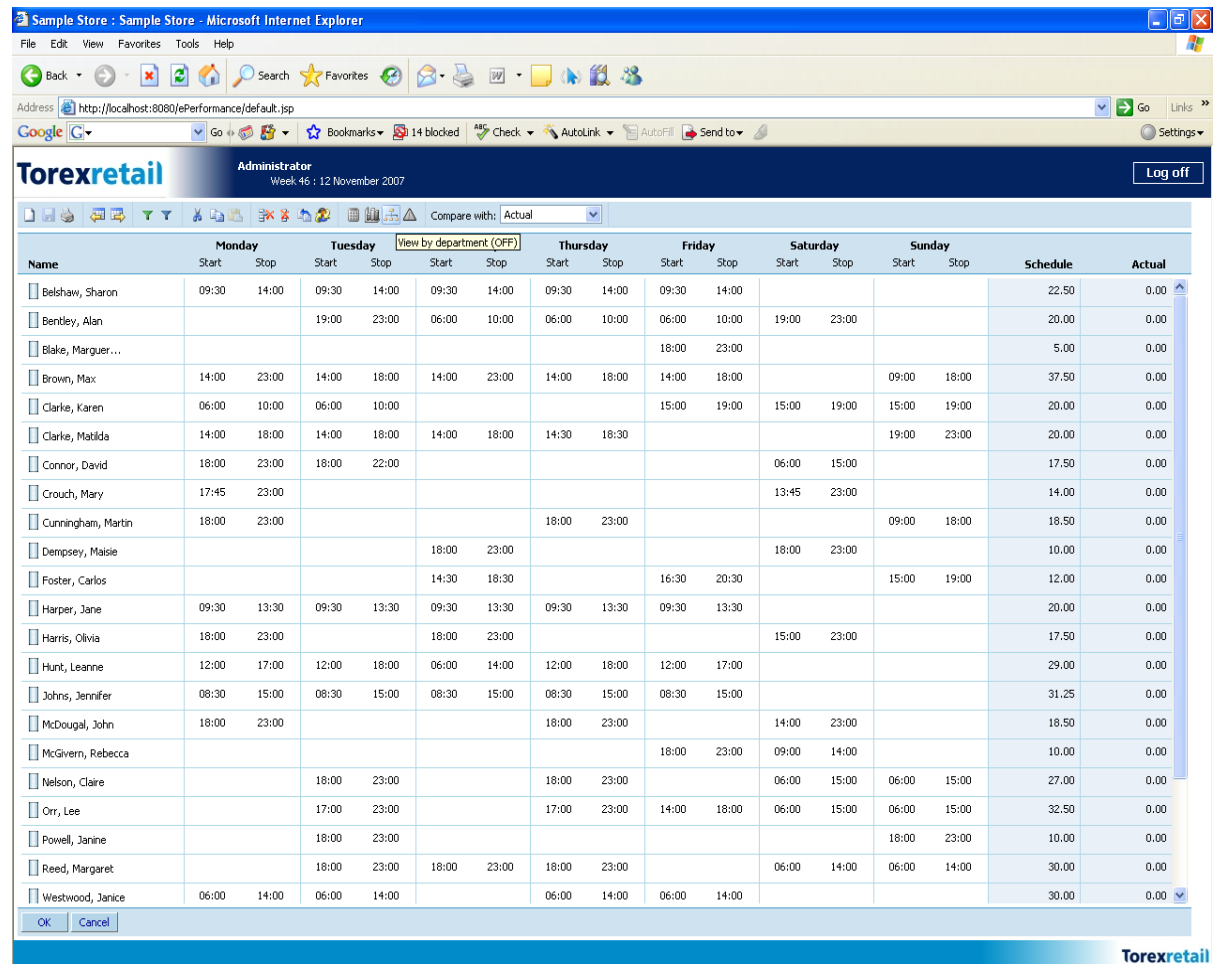
## Compare with Actuals

To Compare the information with the actuals, click dropdown tab to 'Actual':



### Actual window

A screen, similar to that below, will be displayed:



Name	Monday Start	Monday Stop	Tuesday Start	Tuesday Stop	Wednesday Start	Wednesday Stop	Thursday Start	Thursday Stop	Friday Start	Friday Stop	Saturday Start	Saturday Stop	Sunday Start	Sunday Stop	Schedule	Actual
Belshaw, Sharon	09:30	14:00	09:30	14:00	09:30	14:00	09:30	14:00	09:30	14:00					22.50	0.00
Bentley, Alan			19:00	23:00	06:00	10:00	06:00	10:00	06:00	10:00	19:00	23:00			20.00	0.00
Blake, Marguer...									18:00	23:00					5.00	0.00
Brown, Max	14:00	23:00	14:00	18:00	14:00	23:00	14:00	18:00	14:00	18:00			09:00	18:00	37.50	0.00
Clarke, Karen	06:00	10:00	06:00	10:00					15:00	19:00	15:00	19:00	15:00	19:00	20.00	0.00
Clarke, Matilda	14:00	18:00	14:00	18:00	14:00	18:00	14:30	18:30					19:00	23:00	20.00	0.00
Connor, David	18:00	23:00	18:00	22:00							06:00	15:00			17.50	0.00
Crouch, Mary	17:45	23:00									13:45	23:00			14.00	0.00
Cunningham, Martin	18:00	23:00					18:00	23:00					09:00	18:00	18.50	0.00
Dempsey, Maisie					18:00	23:00					18:00	23:00			10.00	0.00
Foster, Carlos					14:30	18:30			16:30	20:30			15:00	19:00	12.00	0.00
Harper, Jane	09:30	13:30	09:30	13:30	09:30	13:30	09:30	13:30	09:30	13:30					20.00	0.00
Harris, Olivia	18:00	23:00			18:00	23:00					15:00	23:00			17.50	0.00
Hunt, Leanne	12:00	17:00	12:00	18:00	06:00	14:00	12:00	18:00	12:00	17:00					29.00	0.00
Johns, Jennifer	08:30	15:00	08:30	15:00	08:30	15:00	08:30	15:00	08:30	15:00					31.25	0.00
McDougal, John	18:00	23:00					18:00	23:00			14:00	23:00			18.50	0.00
McGivern, Rebecca									18:00	23:00	09:00	14:00			10.00	0.00
Nelson, Claire			18:00	23:00			18:00	23:00			06:00	15:00	06:00	15:00	27.00	0.00
Orr, Lee			17:00	23:00			17:00	23:00	14:00	18:00	06:00	15:00	06:00	15:00	32.50	0.00
Powell, Janine			18:00	23:00									18:00	23:00	10.00	0.00
Reed, Margaret			18:00	23:00	18:00	23:00	18:00	23:00			06:00	14:00	06:00	14:00	30.00	0.00
Westwood, Janice	06:00	14:00	06:00	14:00			06:00	14:00	06:00	14:00					30.00	0.00

### Compare with Actuals window

By default, this screen compares the Scheduled hours to the Actual hours worked.

## Compare with Contract

To edit an employee plan and compare it with their contracted hours, click drop down tab and select 'Contract.'

Day	Start	Stop
Wednesday	06:00	10:00
Thursday	06:00	10:00

### Contract window

A screen, similar to that below, will be displayed:

Name	Monday Start	Monday Stop	Tuesday Start	Tuesday Stop	Wednesday Start	Wednesday Stop	Thursday Start	Thursday Stop	Friday Start	Friday Stop	Saturday Start	Saturday Stop	Sunday Start	Sunday Stop	Schedule	Contract
Belshaw, Sharon	09:30	14:00	09:30	14:00	09:30	14:00	09:30	14:00	09:30	14:00					22.50	22.50
Bentley, Alan			19:00	23:00	06:00	10:00	06:00	10:00	06:00	10:00	19:00	23:00			20.00	0.00
Blake, Marguer...									18:00	23:00					5.00	5.00
Brown, Max	14:00	23:00	14:00	18:00	14:00	23:00	14:00	18:00	14:00	18:00			09:00	18:00	37.50	37.50
Clarke, Karen	06:00	10:00	06:00	10:00					15:00	19:00	15:00	19:00	15:00	19:00	20.00	0.00
Clarke, Mahilda	14:00	18:00	14:00	18:00	14:00	18:00	14:30	18:30					19:00	23:00	20.00	0.00
Connor, David	18:00	23:00	18:00	22:00							06:00	15:00			17.50	0.00
Crouchy, Mary	17:45	23:00									13:45	23:00			14.00	14.00
Cunningham, Martin	18:00	23:00					18:00	23:00					09:00	18:00	18.50	18.50
Dempsey, Maisie					18:00	23:00					18:00	23:00			10.00	10.00
Foster, Carlos					14:30	18:30			16:30	20:30			15:00	19:00	12.00	0.00
Harper, Jane	09:30	13:30	09:30	13:30	09:30	13:30	09:30	13:30	09:30	13:30					20.00	20.00
Harris, Olivia	18:00	23:00			18:00	23:00					15:00	23:00			17.50	17.50
Hunt, Leanne	12:00	17:00	12:00	18:00	06:00	14:00	12:00	18:00	12:00	17:00					29.00	29.00
Johns, Jennifer	08:30	15:00	08:30	15:00	08:30	15:00	08:30	15:00	08:30	15:00					31.25	31.25
McDougal, John	18:00	23:00					18:00	23:00			14:00	23:00			18.50	18.50
McGivern, Rebecca									18:00	23:00	09:00	14:00			10.00	10.00
Nelson, Claire			18:00	23:00			18:00	23:00			06:00	15:00	06:00	15:00	27.00	27.00
Orr, Lee			17:00	23:00			17:00	23:00	14:00	18:00	06:00	15:00	06:00	15:00	32.50	32.50
Powell, Janine			18:00	23:00									18:00	23:00	10.00	10.00
Reed, Margaret			18:00	23:00	18:00	23:00	18:00	23:00			06:00	14:00	06:00	14:00	30.00	30.00
Westwood, Janice	06:00	14:00	06:00	14:00			06:00	14:00	06:00	14:00					30.00	30.00

### Compare with Contract window

The other possible options to compare the Plan Editor with, are Action, Paid and Original Schedule

## Action

This option allows to you edit the Plan Editor and compare it with any approved actions from the Action Changes Report


## Paid

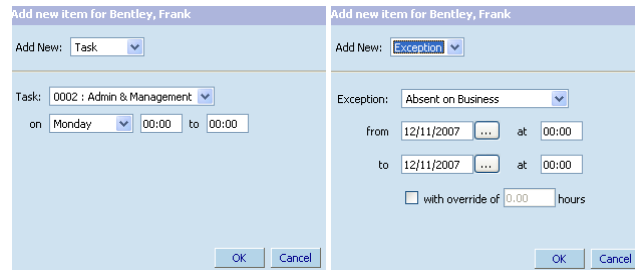
This option allows you to edit the Plan Editor and compare it with an employee's paid hours

## Original Schedule

This option allows you to edit the plan editor and compare it with the un-edited schedule

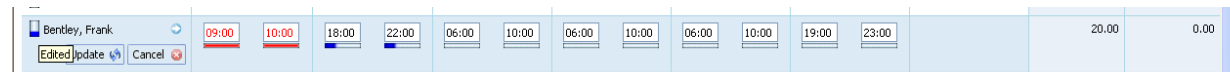
## New Item

Select an employee's name and the . This will bring up a dialogue box. Choose the selected item and complete the box before clicking OK;




### Add New Item window


Click on 'Update' and the new item should be visible. A new (or edited) shift will be indicated by a blue bar and a new exception will be indicated by a red bar.



### Update window

## Save

Click  to save any changes. You will be prompted by a flashing reminder;

 There are unsaved changes

## Print




- Print the Simplified Plan Editor

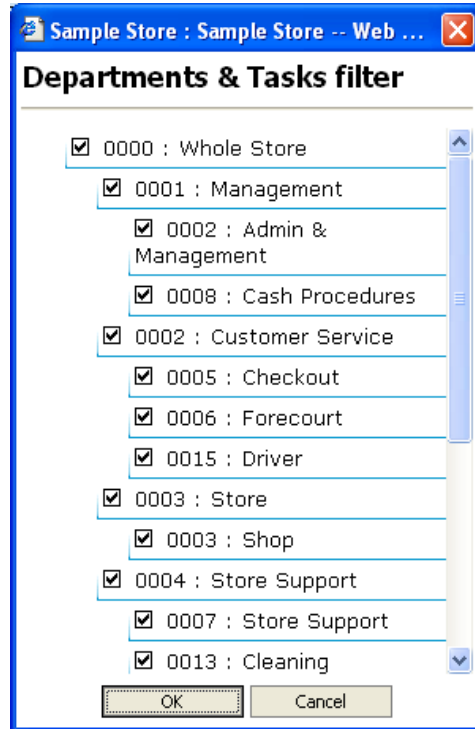
## View Last Week's/Next Week's Plans / Schedules




- These buttons allow the user to view last weeks and next week's Plans/Schedules.

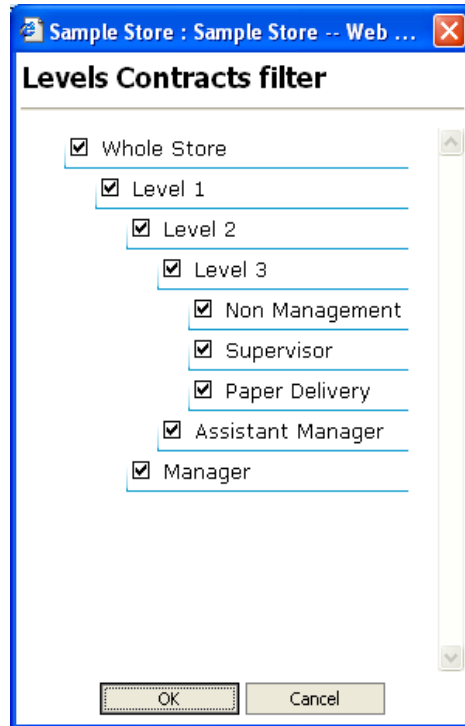
## Filters

Select  to filter by Departments and Task. Click on whole store to deselect all departments and tasks and then tick only the Depts/Tasks you wish to be displayed in the Simple Plan Editor screen and on the Workload Fit graph.



**Departments & Tasks Filter window**

Select  to filter by HR Contracts. Click on whole store to deselect all Contracts then tick only the Contract as you wish to be displayed in the Simple Plan Editor screen and on the Workload Fit graph.




**Levels Contracts Filter window**

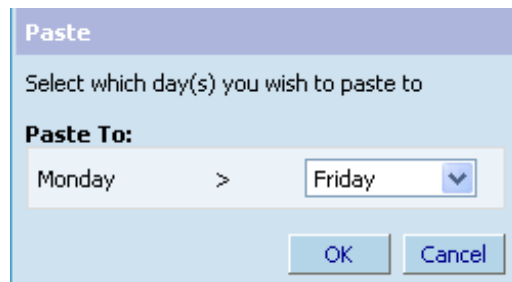
## Cut, Copy, Paste

To cut or copy a shift/shifts to another day/s, select the employee by clicking on their name and select the day of the shift – the selection should become highlighted

Select the  or 

Then choose the day/s you wish the shift to be pasted to, and select the 

This will open up a dialogue box with the day/s you selected showing:



**Paste window**

For multiple day cut/copy pasting (see below), the system will apply the days you have selected in a chronological order; i.e. if you select Wednesday, Monday, Tuesday, the dialogue box will show Monday, Tuesday, Wednesday.

**Paste**

Select which day(s) you wish to paste to

**Paste To:**


Monday	>	Friday
Tuesday	>	Saturday
Wednesday	>	Sunday
Friday	>	(None)

OK Cancel

**Paste Days window**

To change the 'Paste to' days, click drop down tabs.

## Clear an Employee's Shifts on a Particular Day/Days

Click on an employee's name and on a selected day/s then click  to clear the day/s. This will bring up a dialogue box asking you to confirm that you wish to clear the selected days;

**Clear Days**

Are you sure you wish to clear the following day(s) for the selected employee?

Tuesday

Yes No

**Clear Days window**

## Clear an Employee's Entire Weeks Shifts

Click on an employee's name and then click  to clear all shifts in the week. This will bring up a dialogue box asking you to confirm that you wish to clear the entire week;


**Clear Week**

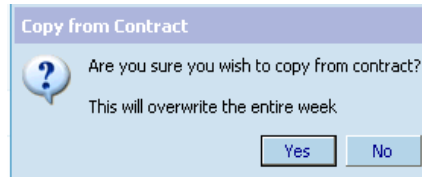
Are you sure you wish to clear the entire week for the selected employee?

Yes No

**Clear Week window**

## Replace an employee's scheduled hours with their contracted hours

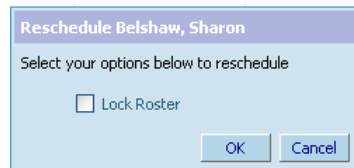
Click on employees name and then click . You will be asked to confirm that you wish to copy the weeks contracted hours and advised that this will overwrite the employees existing schedule



**Copy from Contract window**

## Reschedule an employee

Click on an employee's name and click . A Reschedule dialogue box will be displayed giving you a 'Lock Roster' option;



**Reschedule Employee window**

Ticking in the 'Lock Roster' box ensures that the start and stop times remain but the task/shift changes within them are rescheduled. Leaving the 'Lock Roster' box unticked allows a complete reschedule including a change in start/stop times.

## Auto Calculate Breaks



When selected, the system automatically adds in relevant breaks. When deselected, the user can manually add breaks.

## Validation

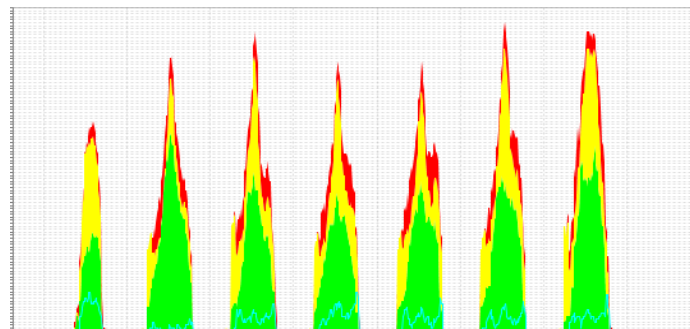


When selected, any validation warnings/errors according to the previously configured validation rules are visible. When deselected, any schedule validation warnings/errors cannot be viewed.

## Workload Fit Graph



This toggle button allows the user to view a smaller version of the workload fit graph at the bottom of the Plan Editor screen, similar to that below;



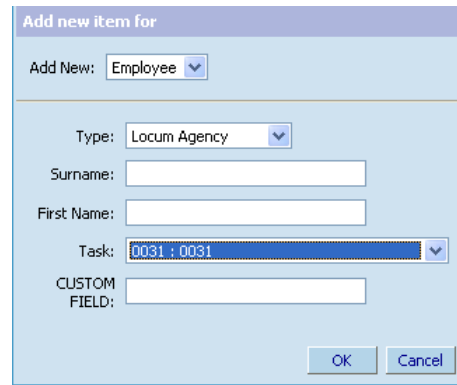
**Workload Fit Graph window**

---

## Scheduling Locums

You can add new employees and contractors from the Schedule Edit Screen to be scheduled into the given week

1. To add a new employee or contractor click 'New' icon in the top left hand corner.
2. A box similar to that below will open.



**Add New Item window**

3. Drop down to the selected contract type and complete the details.
4. Click OK.

A contractor or temporary employee will only be present in the week in which you added them, but a permanent employee will be in the system from the week added onwards.

You will now be able to manually add employee shifts for the week for the new employee (however for a permanent employee to be scheduled using the 'Schedule Go' screen, they will need a rotation/availability pattern).

## View Schedule Cost and Forecast information on Plan Editor

Scroll down to the bottom of the screen and click ([Show Costs](#)) link to view cost figures for the Schedule plan and comparison plan, and the difference between the two, for each day and the total for the week. If you are viewing in departmental mode then it will only display figures for that particular department.

Click ([Show Forecast](#)) link to view forecast drivers and LCP% (Labor Cost Percentage) figures for the store or current department for each day and the total for the week. The number of drivers displayed can be restricted via configuration

## Schedule vs Action Report

See page 259 for further information on the Schedule vs Action Report.

## Department Schedule Report

See page 248 for further information on the Department Schedule Report.

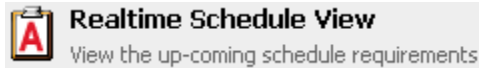
## Target Staffing Report

See page 257 for further information on the Target Staffing Report.

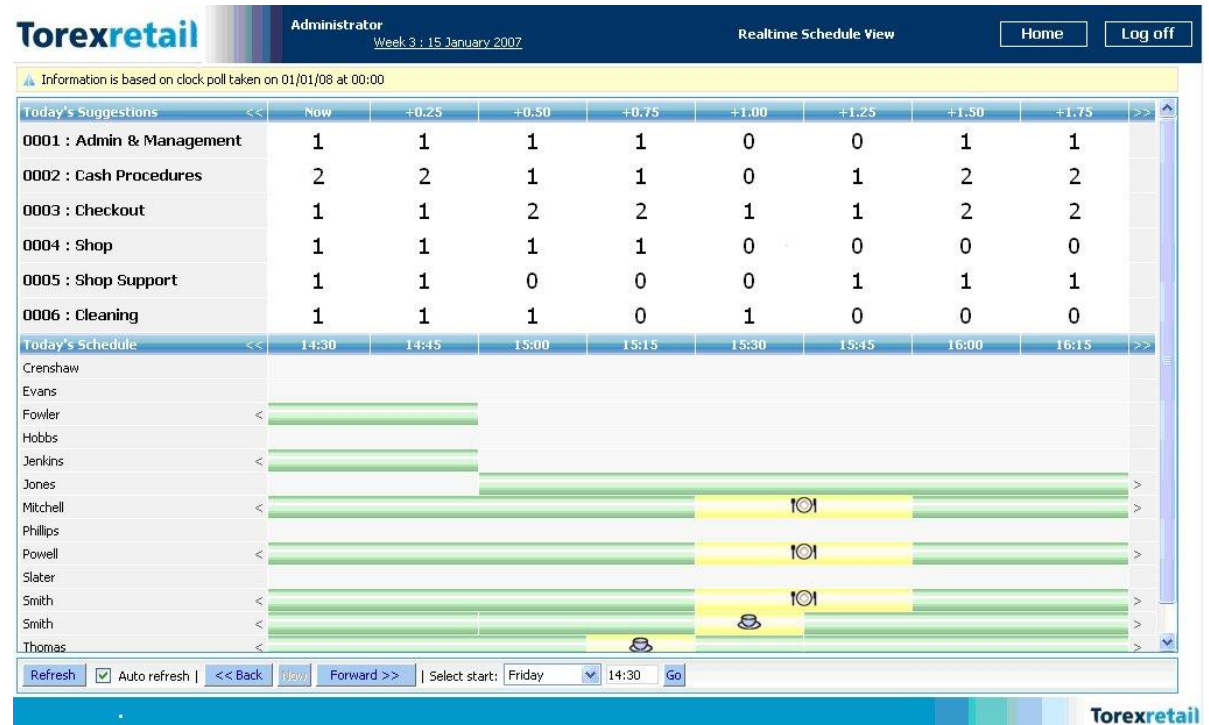


## Realtime Schedule View

1. To look at the Realtime Schedule View, click



2. A screen, similar to that below, will be displayed:



### Real time Schedule View window

3. This screen shows a realtime view of which members of staff are working in each department, at that time.
4. Tea breaks and Meal breaks are indicated by their appropriate icons, as can be seen in the screen above.

## Refreshing the view

1. To refresh the information, so that you are looking at the number of staff working now, click **Refresh**.
2. Alternatively, tick the **Auto Refresh** tick box and the system will automatically update the screen as each time period passes.

## Navigating the view

1. To show past and future staff availability, click <<**Back** to see a previous time period or the **Forward** >> to view the next time period.
2. Alternatively, click << or >> links, to the left and right of the time columns.
3. You can also select a day and time and click **Go**, to jump straight to that time period.

---

## Schedule Action

### Overview

The Schedule Action module provides a way to see problems with schedules which have been run, in terms of mismatch between workload requirement and employee shifts. It will also offer solutions for how these problems can be solved, and inform the user of the consequences of implementing the solutions. For example, the module will identify scenarios where too many or too few employees have been allocated to a task, and then suggest ways other employee shifts could be manipulated to fill gaps or reduce overage.

The module allows for different tasks to have different priorities, which will affect the way the suggestions are displayed on screen. It also incorporates a scoring system, based on staff availability and/or financial cost, to rank suggestions. Any task constraints are also taken into account, with 'closed' tasks (i.e. those without enough staff to meet a minimum requirement) and 'jobless' tasks (i.e. those that exceed the maximum staff requirement) taking priority in ordering (although this is configurable).

Using these priorities, it is also possible to configure the module so that when the scheduler is run, staff will not be allocated to a task where the workload requirement has already been met, thereby preventing overages appearing against real tasks. Here, an 'unscheduled task' is allocated to employees who are surplus at any time of the day. Once the workload requirement is satisfied for a specific task, any staff to be allocated to it will be assigned to the 'unscheduled task' instead.

Employees are allocated to their primary tasks before shortages are filled by the allocation of staff to their secondary tasks so priority is always given to employees for whom the task is their primary task. This also means that the workload requirement of the primary task of all employees who are surplus will have already been met. This 'unscheduled task' has no workload requirement and so all staff allocated to it will be displayed as an Overage (see definition below). This allows a manager, at his own discretion, to easily identify all surplus staff and allocate them to a suitable alternative task.

---

**Note:** Although the scheduler will prevent overages/jobless issues occurring, with the exception of the 'unscheduled task', it is still possible for a manager to create issues of these types through the allocation of staff to tasks using Schedule Action or the shift editor.

---



1. To access the Schedule Action module, click
2. A screen, similar to that below, will be displayed:

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ADMINISTRATOR

Week 3 : 13 May 2007

Schedule Issues

Log off

Budget Summary (click to view)

Filter

All Tasks (change)

Issue Type: All

Day: All Week

Action Type: All

Issue	Task	When	Hours	
Shortage	Management	Mon 12:15 - 12:30	0.50	suggestions...
Shortage	Management	Tue 08:30 - 08:45	0.25	suggestions...
Shortage	Management	Tue 11:45 - 12:30	1.00	suggestions...
Shortage	Management	Tue 18:30 - 19:15	0.75	suggestions...
Shortage	Management	Wed 10:15 - 10:30	0.25	suggestions...
Shortage	Management	Wed 13:30 - 14:30	1.25	suggestions...
Shortage	Management	Wed 15:30 - 15:45	0.50	suggestions...
Shortage	Management	Wed 18:30 - 20:15	1.75	suggestions...
Shortage	Management	Thu 08:30 - 09:45	1.25	suggestions...
Shortage	Management	Thu 10:15 - 10:30	0.25	suggestions...
Shortage	Management	Thu 13:45 - 14:15	0.50	suggestions...
Shortage	Management	Fri 10:30 - 10:45	0.25	suggestions...
Shortage	Management	Fri 12:30 - 12:45	0.25	suggestions...
Shortage	Management	Sat 11:15 - 11:30	0.25	suggestions...
Shortage	Management	Sat 12:30 - 13:30	1.25	suggestions...
Shortage	Management	Sat 14:45 - 15:00	0.25	suggestions...
Shortage	Business Centre	Sun 12:00 - 12:15	0.25	suggestions...
Shortage	Business Centre	Sun 13:30 - 14:00	0.50	suggestions...
Shortage	Business Centre	Mon 11:00 - 11:15	0.25	suggestions...
Shortage	Business Centre	Mon 12:30 - 13:00	0.50	suggestions...
Shortage	Business Centre	Mon 18:15 - 18:30	0.25	suggestions...
Shortage	Business Centre	Tue 08:45 - 09:00	0.25	suggestions...
Shortage	Business Centre	Tue 11:00 - 11:15	0.25	suggestions...
Shortage	Business Centre	Tue 15:00 - 15:15	0.25	suggestions...
Shortage	Business Centre	Tue 16:30 - 17:00	0.50	suggestions...
Shortage	Business Centre	Wed 10:15 - 10:30	0.25	suggestions...

Finished

Approve

Decline

Pending

Review

Print

Approve Action Plan

Total Outstanding Issues: 261

Actions Awaiting Approval: 0

If you need assistance, please contact the Service Desk on 01438 848080

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## Budget Summary window

**NB:** If there are more than one hundred issues, you will see a message asking you to either filter using the controls described below, or click proffered link to show them anyway.

The list shown on the screen contains all the issues that match the current Schedule Action configuration. This list will contain:

- The issue type, out of:
  - Shortage – not enough employees to meet a task’s workload requirement
  - Overage – more than enough employees to meet a task’s workload requirement
  - Closure – not enough employees to meet the minimum requirement for a task
  - Jobless – more employees than the maximum number for a task
- The name of the task for which there is an issue
- When the issue occurs, by day and time period
- The length of time (in hours) which the issue lasts for

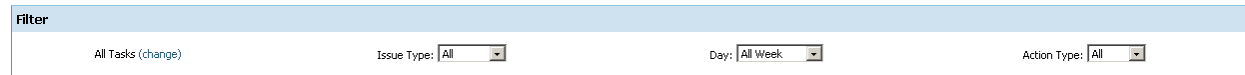
At the top of the screen is a blue bar with the words **Budget Summary** (click to view) on it. Opening this bar by clicking on it will reveal information about the current week, showing the forecast hours and cost, the schedule hours and cost, and the difference between them. Once opened the bar will look like the following:

Budget Summary					
Forecast Hours:	1325.00	Schedule Hours:	2147.75	Difference Hours:	822.75
Forecast Cost:	£12,374.39	Schedule Cost:	£15,306.48	Difference Cost:	£2,932.09

## Budget Summary window

As you approve actions within the module, the schedule hours and cost will update accordingly, as will the corresponding differences.

3. In order to get more refined results, you can use the tools in the filter bar (shown below), located underneath the budget summary row:



Filter

All Tasks (change) Issue Type: All Day: All Week Action Type: All

### Filter window

These controls allow you to filter the following:

- Departments and tasks, if you want to narrow down the area(s) in your business where the problems are occurring
  - Issue type, which allows you see only one of: Shortages, Closures, Overages or Jobless
  - Day of the week to show information for
  - Action type, which allows you to display only one of: Swap, Move, Extend, New
4. Once you are happy with the way the issues are being displayed, you can proceed to actually doing something about them. As your mouse hovers over each issue, you will see a blue band appear behind the row (you do not actually have to click word **suggestions...**; the entire row acts as a hyperlink). Click band to make the system display the suggestions for that particular issue.
  5. The system will open a list of suggestions, each of which containing:
    - The name of the employee who will be affected by the change
    - The type of action, out of:
      - Swap – reassign the employee from a task with an excess of resource
      - Move – ask the employee to work different hours
      - Extend – ask the employee to start earlier or finish later
      - New – ask the employee to do a completely new shift
      - Create/Recruit – will create a new employee with a shift to cover the issue in question
    - The cost of implementing the action (if any)
    - The rating of the action, from zero to five stars. The rating can be configured to display an overall rating, or just the rating in terms of employee availability or the cost of implementing the action. To choose which rating-type you would like to see, click column header (which by default shows as **Rating (overall)**). The overall rating is a combination of the availability and cost ratings.
  6. You can highlight any suggestion that meets your needs by clicking on it. The radio button to the left of the employee's name will become filled.
  7. You now have a choice of doing one of the following to the suggestion you have selected:
    - Approve – this will implement the change and modify the employee's schedule plan
    - Decline – this will remove the suggestion from the list and also remove any other suggested actions involving this employee in the same time period. Note that removed suggestions will reappear if you leave the module and re-enter (assuming the action is still valid).
    - Pending – this will put the action into the 'pending' queue. This queue can be reviewed later, and the actions either approved or declined then. Putting issues into

the pending queue will temporarily re-render the list as if the action had been approved. This allows you to see how implementing the change will affect the issue without actually approving it.

- Review – this will open the ePerformance Shift Editor detailed view for the employee in question. Here you will be able to compare the action plan and the schedule plan (i.e. the employee's current schedule and that which it would become should the change be implemented). Any days which will be affected by the change are highlighted in yellow. On this screen you can also approve or decline the action, or send it to the pending queue. Performing one of these actions will have the same effect as described above.
8. If you have sent any issues to the pending queue, you can review them by clicking **Approve Action Plan**. Doing so will open a screen like that shown below:

**Budget Summary** (click to view)

MANAGEMENT		Total Hours: 9.50	Total Cost: £108.17
<input type="checkbox"/>	Curran, Pete : 6582974	Total Hours: 9.00	Total Cost: £99.52
Issues to be fixed <input type="checkbox"/> Shortage Till Operation Sat 09:00 - 18:00 New shift on Sat at 09:00 - 18:00			
<input type="checkbox"/>	Holland-Barnett, Julie : 6909418	Total Hours: 0.50	Total Cost: £8.65
Issues to be fixed <input type="checkbox"/> Shortage Collect @ Store Sat 09:00 - 18:00 Extend to 17:30 - 18:00			
MANAGEMENT		Total Hours: 9.50	Total Cost: £108.17
CUSTOMER ADVISORS		Total Hours: 0.00	Total Cost: £0.00
<input type="checkbox"/>	Jones, Angie : 6926584	Total Hours: 0.00	Total Cost: £0.00
Issues to be fixed <input type="checkbox"/> Shortage Digital Imaging Thu 10:00 - 10:45 Swap from Domestic Sales on Thu at 10:00 - 10:45			
<input type="checkbox"/> Overage Domestic Sales Thu 08:45 - 11:45 Swap to Digital Imaging on Thu at 10:00 - 10:45			
<input type="checkbox"/>	Rust, Chris : 7550782	Total Hours: 0.00	Total Cost: £0.00
Issues to be fixed <input type="checkbox"/> Shortage Digital Imaging Sun 11:00 - 17:00 Swap from Domestic Sales on Sun at 11:00 - 11:45			
<input type="checkbox"/> Overage Domestic Sales Sun 12:15 - 17:15 Swap to Digital Imaging on Sun at 11:00 - 11:45			
<input type="checkbox"/> Shortage Digital Imaging Sun 11:00 - 17:00 Swap from Domestic Sales on Sun at 12:15 - 13:00			
<input type="checkbox"/> Overage Domestic Sales Sun 12:15 - 17:15 Swap to Digital Imaging on Sun at 12:15 - 13:00			
<input type="checkbox"/> Shortage Digital Imaging Sun 11:00 - 17:00 Swap from Domestic Sales on Sun at 13:30 - 17:00			
<input type="checkbox"/> Overage Domestic Sales Sun 12:15 - 17:15 Swap to Digital Imaging on Sun at 13:30 - 17:00			
CUSTOMER ADVISORS		Total Hours: 0.00	Total Cost: £0.00
<b>Store Total</b>		<b>Total Hours: 9.50</b>	<b>Total Cost: £108.17</b>
<input type="button" value="Finished"/> <input type="button" value="Approve"/> <input type="button" value="Decline"/> <input type="button" value="Approve All"/>		Reports: <input type="button" value="Action Changes Report"/> <input type="button" value="Print"/>	

If you need assistance, please contact the Service Desk on 01438 848080

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### Administration window

This screen has a budget summary bar at the top, which performs the same function as the one described in section 2, above. The screen displays all the actions you have previously sent to the pending queue, organized by department and then employee, as well as the cost and increase in hours the actions would cause. By putting ticks in the appropriate tick boxes, you can select actions and then either approve or decline your selection. You can also approve all the actions in the queue by clicking **Approve All** at the bottom of the screen.

---

Also available from this screen are two reports, described below:

- Action Changes Report – this report shows data for every employee in the store, with pertinent information on employees that have pending changes displayed, as well as hours and cost totals for each department.
- Department Schedule Action Report – similar to the Department Schedule Report, this report will display the action plan (i.e. that plan which would become the schedule plan if the actions were implemented) for any employees which have pending actions.

You can access these reports by choosing from the drop-down menu at the bottom of the screen, and then clicking **Print**. Note that opening the Action Changes Report will automatically cause a print dialogue box to appear, whereas further action will be required after opening the Department Schedule Action Report to make it print (there is another print button on this report).

9. Once you have finished with this screen, click **Finish** to return to the main Schedule Action screen.

10. The only other points to note about this screen are the **Print**, which will generate a report showing all the possible solutions for every action in the list. Note that if there are lots of actions, this report can take a while to generate. Exactly how many issues are left in the list, as well as how many there are in the pending queue is displayed in the bottom-right of the screen. By clicking **Export PDF** a similar report will be generated in PDF format, which can then be printed or saved as required. An **Excel Export** can also be generated and saved to the server.

Once you have completely finished with the module, click **Finish** to leave the module.

## Schedule Action Comparison Report

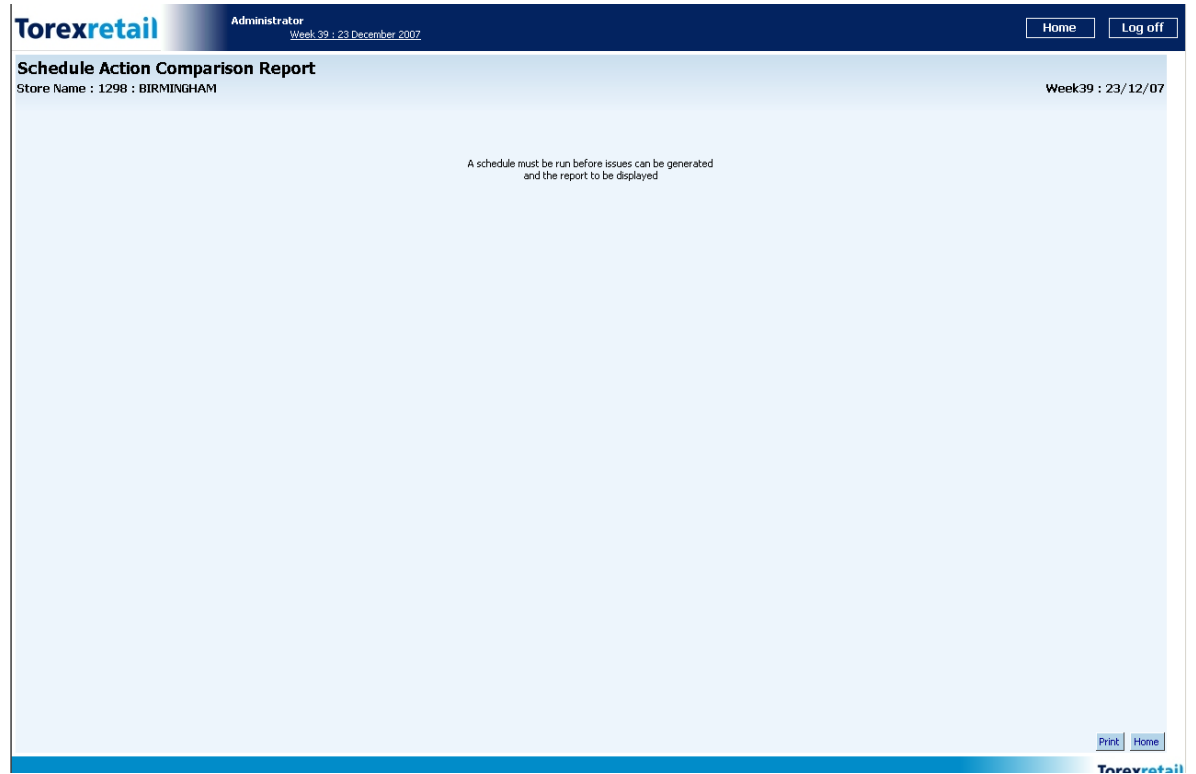
The Schedule Action Comparison Report provides a method for users to compare any differences between employee's Schedule and Action plans. If any actions have been set to pending in the Schedule Action module, they will be applied to the Action plan and the change will be visible here. The report can be configured to show all departments or just those for which there is a difference between Schedule and Action plans for at least one employee.

1. To view the Schedule Action Comparison Report, click



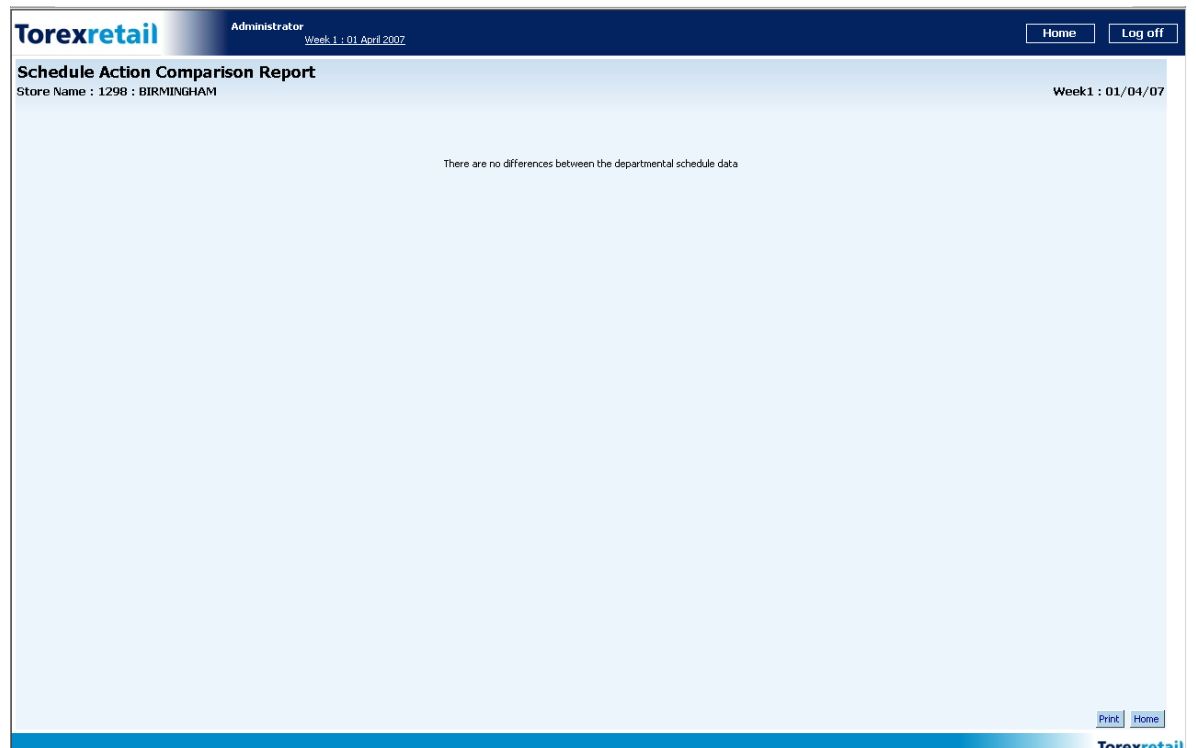
Schedule Action Comparison Report

2. If a schedule has not yet been run for the current week a screen, similar to that below, will be displayed:



#### Schedule Action comparison Report window

3. If a schedule has been run for the current week, but there are no differences between the Schedule and Action plans, a screen, similar to that below, will be displayed:



#### Schedule Action Comparison Report window

4. If a schedule has been run for the current week, and there is a difference between the Schedule and Action plans for at least one employee, a screen, similar to that below, will be displayed:

Torexretail

Administrator

Week 22 : 26 August 2007

Schedule Action Comparison Report

Store Name : 1298 : BIRMINGHAM

Department - 0009 : PHARMACY

Employee		Sunday	Monday	Tuesday	Wednesday	
Ladak	Schedule					
	Action					
Mahmood	Schedule					
	Action					
Totals						
Totals	Schedule	0.00	0.00	0.00	0.00	
	Action	0.00	0.00	0.00	0.00	

#### Report window

The above report is displaying the Pharmacy department and the employees located within this department. The first line shows the employee's Schedule plan and the second line their Action plan. As you can see in the image, a new shift has been added to Mahmood's Action plan on the Saturday.

#### Print

1. Clicking **Print**, will open a standard print dialog box.
2. Select the relevant printer and click **OK**.
3. The report will be printed.



# Time and Attendance

## T&A Edit

1. To edit an employee's actual working hours, click



**T&A Edit**

Manually edit employee actuals (Compare with schedule)

2. A screen, similar to that below, will be displayed:

**Torexretail** Administrator Week 3 : 15 January 2007 T and A Edit V3 Log off

Name	Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Sunday		Actual	Schedule
	Start	Stop	Start	Stop	Start	Stop	Start	Stop	Start	Stop	Start	Stop	Start	Stop		
<input type="radio"/> Crenshaw, Pat							07:00	12:15	07:00	12:45	12:45	18:30	08:45	18:30	26.00	26.00
<input type="radio"/> Evans, Dorothy	15:00	20:00	15:00	23:00			15:00	23:00							20.00	20.00
<input type="radio"/> Fowler, Robert	07:00	15:00	07:00	15:00	07:00	15:00	07:00	15:00	07:00	15:00					37.50	37.50
<input type="radio"/> Hobbs, Gareth	15:00	17:45			15:00	20:45			07:00	12:45	07:00	12:45			20.00	20.00
<input type="radio"/> Jenkins, Pauline	07:00	09:00	07:00	09:00	07:00	13:30	07:00	15:00	07:00	15:00					25.00	25.00
<input type="radio"/> Jones, Patrick	07:00	15:00			15:00	23:00			15:00	23:00	15:00	23:00	07:00	15:00	37.50	37.50
<input type="radio"/> Mitchell, John	07:00	09:00			07:00	09:00	07:00	15:00	08:45	18:30	10:00	19:45			30.00	30.00
<input type="radio"/> Phillips, Sonja					07:00	09:00	07:00	09:00	12:15	14:15	07:00	14:00	15:00	23:00	20.00	20.00
<input type="radio"/> Powell, Grant	20:00	22:00			09:00	11:00	08:45	16:00	08:45	18:30					20.00	20.00
<input type="radio"/> Slater, Emma	07:00	09:00	07:00	09:00	07:00	09:00	07:00	09:00	07:00	09:00	07:00	09:00	07:00	09:00	14.00	14.00
<input type="radio"/> Smith, Katie	07:00	10:00	07:00	16:45	07:00	16:45	08:45	18:30	08:45	18:30					40.00	40.00
<input type="radio"/> Smith, Ryan			07:00	09:45					13:00	22:45	07:00	16:30	07:00	11:00	25.00	25.00
<input checked="" type="radio"/> Thomas, Ian	07:00	10:30	07:00	16:45	07:00	16:45	13:45	23:00	12:45	22:30					40.00	40.00
<b>Actual Totals</b>	37.25		40.25		53.25		64.00		84.25		45.75		30.25		<b>355.00</b>	
<b>Schedule Totals</b>	37.25		40.25		53.25		64.00		84.25		45.75		30.25			<b>355.00</b>
<b>Difference</b>	0.00		0.00		0.00		0.00		0.00		0.00		0.00			0.00

Add New:

Task filter... HR filter... | Toggle graph | Toggle Dept. view | Last week | Next week | Compare with:

OK Cancel Apply | Print | Clear Week | Clear Selected Days | Copy Schedule | Cut Copy Paste... | ☒ Auto Calc Breaks

Torexretail

### T&A Edit window

3. After making any changes, ensure you click **Apply** at the bottom of the screen to send that information to the system.
4. The icons next to each shift have different representations, depending on the colors used:
  - This shift is unedited
  - This shift has been edited
  - This shift has been edited and differences in the number of hours worked have been authorized or denied in the T&A Action screen.

## Add New...

At the bottom of the screen is an **Add New** drop down menu. This enables you to add a new task or exception for example, Holiday, to an individual.

---

Add New:  on  from  to

#### Add New window

1. Click in the circular button, to the left of the specific member of staff.
2. Click **Add New** drop down menu and click appropriate item in the list.
3. Select the appropriate day, to the right hand side.
4. Enter the start and end times.
5. Click **Add**.
6. This new task will be appended to that staff members tasks for the day, if appropriate.

## Task Filter

1. Clicking **Task Filter...** will display a window, similar to the one below:

**Departments & Tasks filter**

- ☒ 0000 : Whole Store
- ☒ 0001 : Management
  - ☒ 0001 : Admin & Management
  - ☒ 0002 : Cash Procedures
- ☒ 0002 : Store
  - ☒ 0004 : Shop
- ☒ 0003 : Customer Service
  - ☒ 0003 : Checkout
- ☒ 0004 : Support
  - ☒ 0005 : Shop Support
- ☒ 0006 : Cleaning
- ☒ 0007 : Stocktake

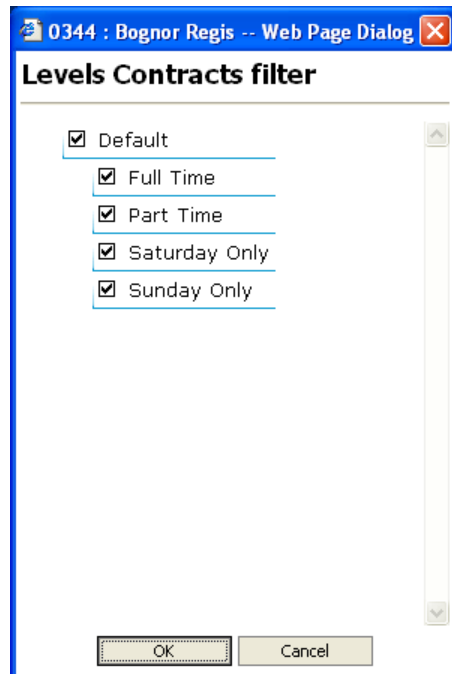
OK Cancel

#### Departments & Tasks Filter window

2. Ticking and unticking the boxes allows you to limit or increase the number of staff displayed on screen at once, for example, ticking the **Cash Procedures** box would only show those members of staff with a Cash Procedures task.

## HR Filter

1. Clicking **HR Filter...** will display a window, similar to the one below:

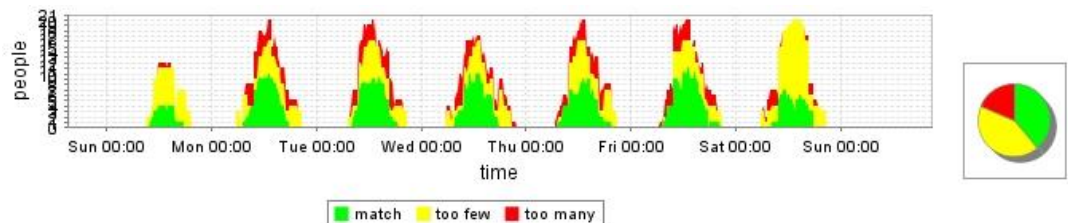


**Levels Contracts Filter window**

2. Ticking and unticking the boxes allows you to limit or increase the number of staff displayed on screen at once, for example, ticking the **Part Time** box would only show those members of staff who work part time.

## Toggle Graph

1. Clicking **Toggle Graph** displays a visual representation of the staff allocation for each day. The graph appears at the bottom of the page.



**Toggle Graph window**

2. The colors represent the following:
  - **Match** – The right number of staff, working at the right times
  - **Too Few** – Not enough staff working at certain times during the day.
  - **Too Many** – Too many staff working at certain times during the day.

For example, in the example graph above, the end column is mostly yellow. This indicates that for a large percentage of the day, they are understaffed.

3. Moving your cursor over the different colors will display text, indicating what each color means.
4. To hide the graph, click **Toggle Graph** again.

---

## Toggle Dept. View

1. Clicking **Toggle Dept. View** will group the staff members together by department and shows separate totals and summaries for each department.
2. Clicking **Toggle Dept. View** will display all members of staff in a single list again.

## Navigating the Weeks

1. To change the current view to display a different week, click **Last Week** or **Next Week**.

## Compare with...

1. The **Compare With** option allows you to select from the following choices:
  - Contract
  - Schedule
  - Action
  - Paid
2. Selecting one of these options will change the end column of the screen. It is displayed next to the **Actual** column, allowing you to compare the 2 sets of data.
3. The 2 columns are totaled at the bottom of the screen and display any discrepancies.

## Print

1. Clicking **Print** will display a standard print dialog box.
2. Select the appropriate printer and click **OK**.
3. This will output the contents of the screen to the selected printer.

## Clear Week

To clear all of the shifts from an individual employee:

1. Click in the circular box, next to the appropriate employee.
2. Click **Clear Week**.
3. You will be asked **Shifts will be cleared, are you sure?** Click on **OK** to confirm or **Cancel** to return to the previous screen.
4. All of the shifts for that employee will now be removed.

## Clear Selected Days

To clear all of the shifts from an individual employee, for a selected day:

1. Click in the circular box, next to the appropriate employee.
2. Tick the box, above the applicable day.
3. Click **Clear Selected Days**.
4. You will be asked **Shifts on selected days will be cleared, are you sure?** Click on **OK** to confirm or **Cancel** to return to the previous screen.
5. All of the shifts for that employee will now be removed.

---

## Copy Contract / Schedule / Action / Paid

1. This button changes, depending on which column you are currently using with the **Compare With** option (See Page 232 for further information).
2. Clicking on this button, after selecting an employee, will copy those hours and apply them to the employee for example, If **Contracted** was selected and we clicked the button, that employees contracted hours would be applied to that week.

## Cut, Copy and Paste

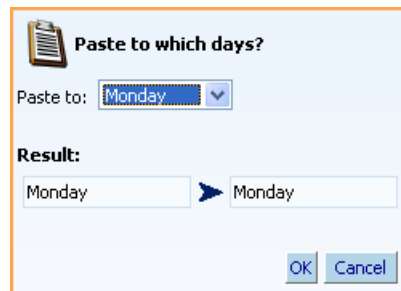
The **Cut**, **Copy** and **Paste** buttons allow you to copy or move shifts from one employee to another.

---

**Note:** The **Paste** button will only become active, after you have **Cut** or **Copy** a valid shift.

---

1. Click in the circular button, next to the employee whose shift you want to duplicate.
2. Click in the tick box, above the relevant day.
3. Either click on **Cut** or **Copy**. **Cut** will remove the selected shift from the employee, whereas **Copy** will duplicate the shift.
4. Click in the circular button, next to the employee who you want to copy the shift to.
5. Click Paste.
6. A box, similar to that below, will be displayed:



**Paste window**

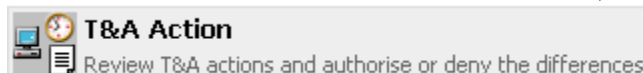
7. Select the relevant day from the list and then click **OK**.
8. The selected employee will now have a shift allocated to them.

## Auto Calc Breaks

If this box is left ticked, the system will automatically calculate the breaks for the staff members, if the shift is changed.

## T&A Action

1. To access the **Time and Attendance Action** screen, click



2. This will display a screen, similar to the one below:

## T&amp;A Action

Dept/Task	Total	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
	Early Finish	Early Start	Extra Hours Worked	Late Finish	Late Start	Unplanned Absence		
Whole Store :	0.00	0.00	1.00	0.00	-0.50	0.00		
Customer Pay Points :	0.00	0.00	0.00	0.00	0.00	0.00		
Entertainment :	0.00	0.00	1.00	0.00	0.00	0.00		
Office :	0.00	0.00	0.00	0.00	0.00	0.00		
OOH :	0.00	0.00	0.00	0.00	0.00	0.00		
Sales Floor :	0.00	0.00	0.00	0.00	0.00	0.00		
Stockroom & Deliveries :	0.00	0.00	0.00	0.00	-0.50	0.00		
Initiatives :	0.00	0.00	0.00	0.00	0.00	0.00		
SM, Ams :	0.00	0.00	0.00	0.00	0.00	0.00		

## T&amp;A Action window

- It shows the number of absences and additional hours worked, by each department / task. For example, in the example above, we can see that **1.00** hour extra was worked in the Entertainment department and **0.50** of an hour less was worked in the Stockroom & Deliveries department.
- Clicking **1.00** extra hours will alter the view to show a further breakdown of the discrepancies.
- Clicking second **1.00** will display a screen, similar to that below:

Administrator  
Week 50 : 07 January 2007

Home
Log off

Links

view summary

Actions filtered for: All Week : Extra Hours Worked
Update

Actions awaiting decision (1 actions)

<div> Hooper, Deborah Kathleen  Wednesday 08:30-17:00 </div> <div> Please Select... </div>	<div> Additional Absence Information  1.00 hrs </div>
--	---

Actions awaiting confirmation (0 actions)

There are no actions in this view

Actions that have been implemented (0 actions)

There are no actions in this view

#### Action Filtered window

6. This screen shows any staff, in that department, who has worked more or less hours. Clicking drop down menu, which says **Please Select...** displays the following options:
  - **[Preview] Pay Scheduled** – Provisionally pay the member of staff for the hours they are **meant** to work.
  - **[Preview] Pay Worked** – Provisionally pay the member of staff for the hours they have **actually** worked.
  - **Pay Scheduled** – Pay the member of staff for the hours they are **meant** to work.
  - **Pay Worked** – Pay the member of staff for the hours they have **actually** worked.
7. Once the appropriate option has been selected, click **Update** at the top of the screen.
8. If you selected one of the **[Preview]** options, the staff name will appear under the **Actions awaiting confirmation** heading. The drop down menu, next to each member of staff, contains the following options:
  - **Pending** – This status indicates that the final decision has not been made about the staff payment. When applied, any member of staff with this status will remain in the **Actions awaiting confirmation** section.
  - **Commit** – This confirms the provisional choice about the payment. When applied, any member of staff with this status will be moved to the **Actions that have been implemented** section and the decision will be applied to the system.
  - **Undo** – This rejects the provisional choice about the payment. When applied, any member of staff with this status will be moved to the **Actions awaiting decision** section, where the decision can be made again.

Administrator  
Week 50 : 07 January 2007

Home
Log off

Links

view summary

Actions filtered for: All Week : Extra Hours Worked
Update

Actions awaiting decision (0 actions)

There are no actions in this view

Actions awaiting confirmation (1 actions)

Id: 6351 Hooper, Deborah Kathleen Wednesday 08:30-17:00	Pay Worked	1.00 hrs	Pending
--	------------	----------	---------

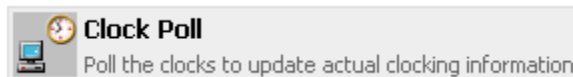
Actions that have been implemented (0 actions)

### Actions Filtered window

- When the correct choices have been made, click **Update** at the top of the screen.
- When all of the choices have been made, click **view summary** link on the left hand side of the screen, to return to the main T & A Action screen.
- Repeat the process above for each of the discrepancies.
- Once all of the times have been set to **0**, then all of the discrepancies have been accounted for.

## Clock Poll

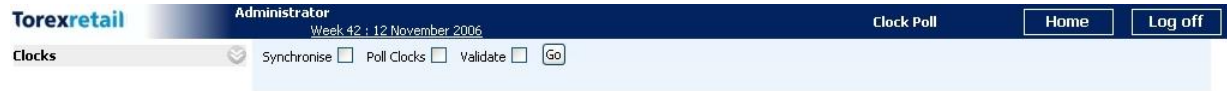
- To access this area of the software, click



- A screen, similar to that below, will be displayed:



---



#### Clock Poll window

3. To run any of the tasks, tick the boxes and then click **Go**. A description of each task, can be found below. This will then begin to process the information and will display the **Background Task Administrator** screen.

### Synchronies

1. Ticking the **Synchronies** box will ensure that the time on the clock is the same as in this application.

### Poll Clocks

1. Ticking the **Poll Clocks** box will transfer the clocking in and out information from the clocks and imports it into this application. Once complete, it will then delete this information from the clocks.

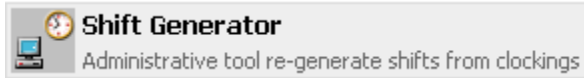
### Validate

1. Ticking the **Validate** box will update the employee information in the clocks. It will add any new employee data and delete any employees who have left.

---

## Shift Generator

1. To access the **Shift Generator**, click



2. A screen, similar to the one below, will be displayed:


A screenshot of the "Shift Generator" application window. The window has a dark blue header bar with the "Torexretail" logo on the left, the user role "Administrator" and the date "Week 42 : 12 November 2006" in the center, and the title "Shift Generator" on the right. To the right of the title are two buttons: "Home" and "Log off". Below the header bar, the main content area has a light blue background. It displays "Shift Generator" on the left, "Fileset: 0344 : Witney" in the center, and "Week: 12/11/06" on the right. Below this, there is a section with two radio buttons. The first is labeled "All Employees" and is selected. The second is labeled "Select Employee" and is followed by a dropdown menu showing "Smith, John". At the bottom left of this section is an "OK" button.

---

### Shift Generator window

3. Either leave the **All Employees** option selected or choose someone from the **Select Employee** list and then click **OK**.

# Reports

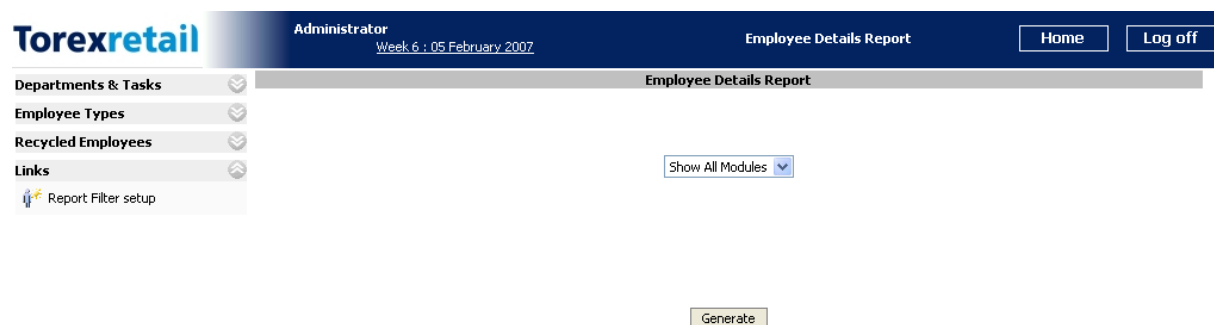
1. To view the Reports module, click  **Reports**  
System reporting suite.

## HR Reports

1. To view the HR Reports, click  **HR Reports**  
View HR data reports.

## Employee Details Report

1. To view the Employee Details Report, click  **Employee Details Report**  
Standard report showing employee database information.
2. A screen, similar to that below, will be displayed:



### Employee Details Report window

3. Select the relevant filter from the list and click **Generate**.
4. A report will be displayed, which shows all of the details for the employees, as specified in the selected filter.

Print

Back

Store Name : 1229 : Birmingham  
Report Title : Employee Details Report  
Printed By : Administrator  
Filtered By :

2007 2  
Week 6 : 05/02/07  
Printed : 07 February 2007

**EmployeeTypes**  
Employee  
**EmployeeRecycled**  
Active Employee  
**tasks**  
All

**Crenshaw, Pat : 104**

Start Date : 03/01/06  
Recycle : AUTH REQ  
P46 Received : No

Finish Date :  
Reason For Leaving :  
Reference Received : AUTH REQ

Type : Employee  
P45 Received : No  
EmpNo : AUTH REQ

**Main Details - Crenshaw, Pat : 104****Effective Date :**

Surname : Crenshaw  
Forenames : Pat  
Title : Ms  
Known as : AUTH REQ  
Date of Birth : AUTH REQ  
NI Category : AUTH REQ  
Maiden Name : AUTH REQ

Payroll : 104  
Badge : 104  
Telephone : AUTH REQ  
Flags : AUTH REQ  
Contract Type : Management  
Pension : AUTH REQ  
Marital Status : AUTH REQ

Job Code : Supervisor  
Unit Id : AUTH REQ  
Experience : AUTH REQ  
Age Group : AUTH REQ  
Grade : AUTH REQ  
NI Number : AUTH REQ  
Ethnic Origin : AUTH REQ

**Task Details - Crenshaw, Pat : 104****Effective Date :**

Primary Task : 0001 : Admin & Management

**Report window**

5. To print the report, click **Print** in the top left hand corner of the screen.
6. A standard Windows print dialog box will be displayed. Select the relevant printer and click **Print** to print the document.

**Filters**

1. The report filters, in the top left hand corner of the screen, allow you to refine the information which is displayed in the report.
2. Clicking on one of the links will display a window, similar to the one below:

**Departments & Tasks filter**

- ☒ 0000 : Whole Store
  - ☒ 0001 : Management
    - ☒ 0001 : Admin & Management
    - ☒ 0002 : Cash Procedures
  - ☒ 0002 : Store
    - ☒ 0004 : Shop
  - ☒ 0003 : Customer Service
    - ☒ 0003 : Checkout
  - ☒ 0004 : Support
    - ☒ 0005 : Shop Support
    - ☒ 0006 : Cleaning

OK Cancel

**Departments & Tasks Filter window**

3. Ticking and unticking the boxes allows you to select which information is included in the report for example, only ticking Management, in the box above, would only display employees in the Management department.
4. Select the relevant boxes from each of the filters and click **OK** to confirm your choice or **Cancel** to disregard.

**Report Filter Setup**

1. To setup a specified filter, for use with the report, click **Report Filter Setup** link on the left hand side of the screen.
2. A screen, similar to that below, will be displayed:

Torexretail

Administrator

Week 6 : 05 February 2007

Home

Log off

Links

Employee Report

Select item

Description

Basic Details

Bas

Edit

New

Delete

Select Item window

### Create a New Report Filter

- To create a new report filter, click **New** at the bottom of the page.
- A screen, similar to that below, will be displayed:

Torexretail

Administrator

Week 6 : 05 February 2007

Log off

New item

Description

Control Details

Include Section

EmpNo

Start Date

Reason For Leaving

Reference Received

Name

Finish Date

P45 Received

Manually Set Visible

Type

Recycle

P46 Received

Visible Date

Main Details

Task Details

Rotation Details

Availability Details

Matrix Details

Sch Opt Details

Daily Sch Opt Details

Pay Rate Details

Training Details

OK

Cancel

New Item window

3. By default, all of the tick boxes will be selected. This means that all of the items displayed, will appear on the report.
4. To create a specific filter for the report, enter an appropriate name in the **Description** field.
5. Deselect options, by clicking on them. Unticked boxes will not appear in a report.
6. Click heading names to view more options.
7. When ready, click **OK** to save and confirm or **Cancel** to disregard.
8. This filter will now be available for selection from the drop down menu on the report screen.

#### Edit a Report Filter


1. To edit a Report Filter, click on its name in the list and click **Edit**.
2. Make any relevant changes and click **OK** to save and confirm or **Cancel** to disregard.

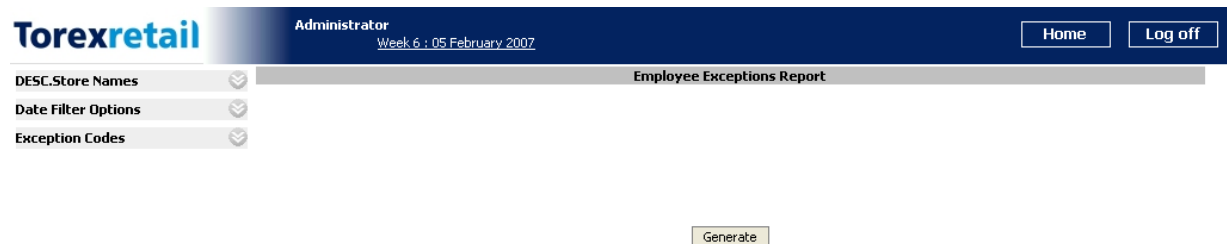
#### Delete a Report Filter

To delete a report filter, click on its name in the list and click **Delete**, at the bottom of the screen.

You will be asked **Are you sure you want to delete this item?** Click **Yes** to confirm or **Cancel** to disregard.

## Non-Attendance Report

1. To view the Non-Attendance Report, click  **Non-Attendance Report** View a printer-friendly list of absences.
2. A screen, similar to that below, will be displayed:



Employee Exception Report window

3. To run the report, click **Generate**.
4. The report will be displayed on screen.

**Torexretail**
Administrator  
Week 6 : 05 February 2007

Home
Log off

Print
Back

Store Name : 1229 : Birmingham  
Report Title : Employee Exceptions Report  
Printed By : Administrator  
Filtered By :

2007 2  
Week 6 : 05/02/07  
Printed : 06 February 2007

Store Names  
None

Date Filter Options  
Week

Exception Codes  
All

Week:05/02/07							
Refno	Emp Name	Exception Type	Start Date	Start Time	End Time	Override	Hours
4	Thomas, Ian	Holiday	06/02/07	00:00	00:00	No	9.25
4	Thomas, Ian	Holiday	07/02/07	00:00	00:00	No	9.25
4	Thomas, Ian	Holiday	08/02/07	00:00	00:00	No	9.25
4	Thomas, Ian	Holiday	09/02/07	00:00	00:00	No	9.25

Torexretail

#### Report window

5. To print the report, click **Print**.
6. A standard Windows print dialog box will be displayed. Select your printer from the list and click **Print** to send the report to the printer.

#### Filter

1. The report filters, in the top left hand corner of the screen, allow you to refine the information which is displayed in the report.
2. Clicking on one of the links will display a window, similar to the one below:





**DESC.Store Names filter**

1002 : Coventry	<input type="checkbox"/>
1003 : Wolverhampton	<input type="checkbox"/>
1004 : Walsall	<input type="checkbox"/>
1005 : Worcester	<input type="checkbox"/>
1006 : Leicester	<input type="checkbox"/>
1007 : Derby	<input type="checkbox"/>
1008 : Nottingham	<input type="checkbox"/>
1009 : Stoke	<input type="checkbox"/>
1010 : Stratford	<input type="checkbox"/>
1229 : Birmingham	<input type="checkbox"/>
1232 : Witney	<input type="checkbox"/>
Global	<input type="checkbox"/>

**Store Names Filter window**

3. Ticking and unticking the boxes allows you to select which information is included in the report for example, only ticking Birmingham, in the box above, would only display employees from the Birmingham store.
4. Select the relevant boxes from each of the filters and click **OK** to confirm your choice or **Cancel** to disregard.

## Entitlement Report



1. To view the Entitlement Report, click
2. A screen, similar to that below, will be displayed:

Departments &amp; Tasks

Employee Types

Recycled Employees

Links

 Report Filter setup

Entitlement Report

Day 5 Month February Year &lt;&lt; 2007 &gt;&gt;

Balance: Holiday

Generate

**Entitlement Report window**

3. Select the relevant date from the drop down menus.
4. Select the appropriate **Balance** from the list.
5. Click **Generate** and the report will be displayed showing the entitlements for each employee, separated by department.

Print

Back

Store Name : 1229 : Birmingham

Report Title : Entitlement Report

Printed By : Administrator

Filtered By :

2007 2

Week 6 : 05/02/07

Printed : 07 February 2007

## Holiday Entitlement Report for 5/2/2007

Store: 1229 : Birmingham

<b>Dept: 0001 : Management</b>					
<b>Task: 0001 : Admin &amp; Management</b>	<b>Entitlement</b>	<b>Taken</b>	<b>Balance</b>	<b>Booked</b>	<b>Remaining</b>
Crenshaw, Pat	0.00	0.00	0.00	0.00	0.00
Smith, Katie	0.00	0.00	0.00	0.00	0.00
Thomas, Ian	20.00	0.00	20.00	0.00	20.00
<b>Task Totals</b>	<b>20.00</b>	<b>0.00</b>	<b>20.00</b>	<b>0.00</b>	<b>20.00</b>
<b>Task: 0002 : Cash Procedures</b>					
<b>Entitlement</b>	<b>Taken</b>	<b>Balance</b>	<b>Booked</b>	<b>Remaining</b>	
Smith, Ryan	0.00	0.00	0.00	0.00	0.00
<b>Task Totals</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Department Totals</b>	<b>20.00</b>	<b>0.00</b>	<b>20.00</b>	<b>0.00</b>	<b>20.00</b>
<b>Dept: 0002 : Store</b>					
<b>Task: 0004 : Shop</b>	<b>Entitlement</b>	<b>Taken</b>	<b>Balance</b>	<b>Booked</b>	<b>Remaining</b>
Hobbs, Gareth	0.00	0.00	0.00	0.00	0.00
Jenkins, Pauline	0.00	0.00	0.00	0.00	0.00
<b>Task Totals</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Department Totals</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>
<b>Dept: 0003 : Customer Service</b>					
<b>Task: 0003 : Checkout</b>	<b>Entitlement</b>	<b>Taken</b>	<b>Balance</b>	<b>Booked</b>	<b>Remaining</b>
Evans, Dorothy	0.00	0.00	0.00	0.00	0.00
Jones, Patrick	0.00	0.00	0.00	0.00	0.00
Phillips, Sonja	0.00	0.00	0.00	0.00	0.00
Powell, Grant	0.00	0.00	0.00	0.00	0.00

## Report window

- To print the report, click **Print**.
- A standard Windows print dialog box will be displayed. Select your printer from the list and click **Print** to send the report to the printer.

## Filters

- The report filters, in the top left hand corner of the screen, allow you to refine the information which is displayed in the report.
- Clicking on one of the links will display a window, similar to the one below:

**Departments & Tasks filter**

- ☒ 0000 : Whole Store
  - ☒ 0001 : Management
    - ☒ 0001 : Admin & Management
    - ☒ 0002 : Cash Procedures
  - ☒ 0002 : Store
    - ☒ 0004 : Shop
  - ☒ 0003 : Customer Service
    - ☒ 0003 : Checkout
  - ☒ 0004 : Support
    - ☒ 0005 : Shop Support
    - ☒ 0006 : Cleaning

OK Cancel


**Departments & Tasks Filter window**

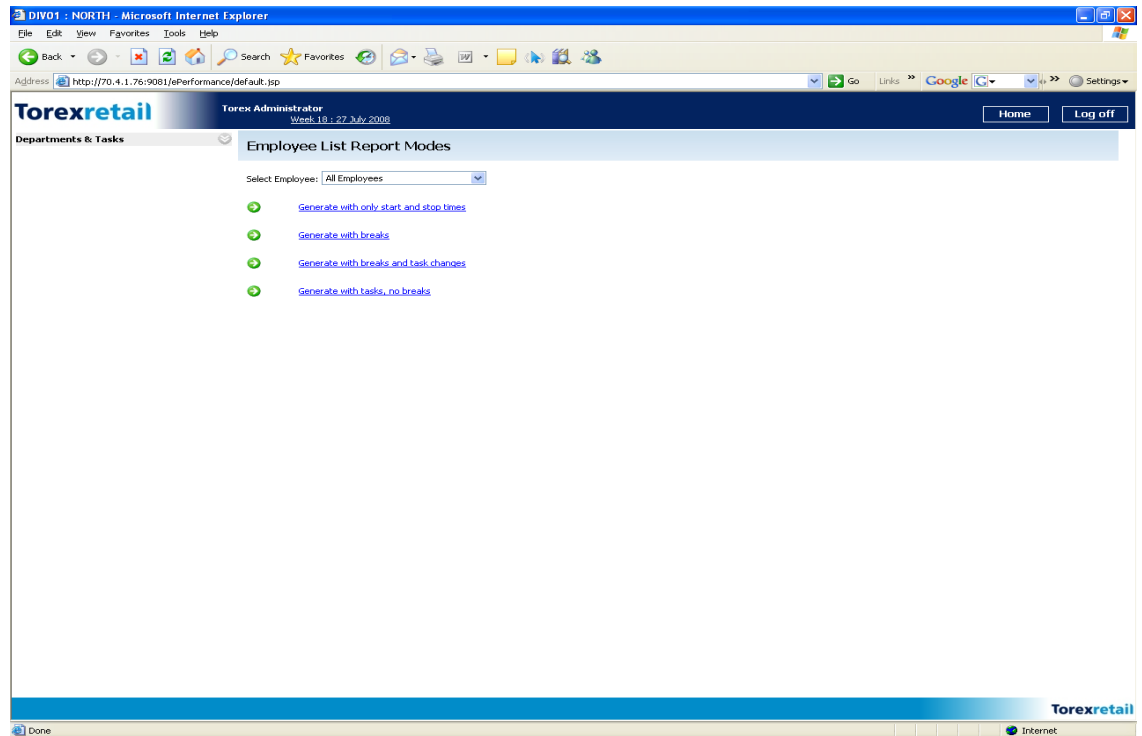
3. Ticking and unticking the boxes allows you to select which information is included in the report for example, only ticking Management, in the box above, would only display employees in the Management department.
4. Select the relevant boxes from each of the filters and click **OK** to confirm your choice or **Cancel** to disregard.

## Scheduling Reports

1. To view the Scheduling Reports, click  **Scheduling Reports**  
View schedule data reports.

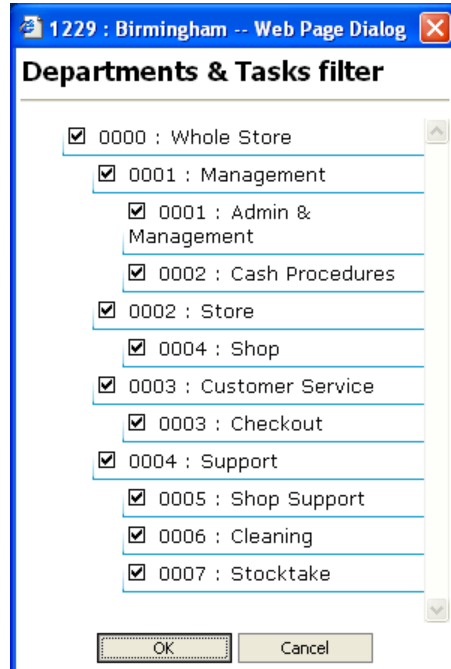
### Department Schedule Report

1. To view a Department Schedule Report, click  **Department Schedule Report**  
Standard format report, ideal for displaying for employees.
2. A screen, similar to that below, will be displayed:



**Employee List Report Modes window**

3. Clicking **Departments & Tasks** link, on the left hand side of the screen, will display a window, similar to that below:



**Departments &Tasks Filter window**

4. Ticking and unticking the boxes allows you to limit or increase the number of staff displayed on screen at once, for example, ticking the **Management** box would only show those members of staff who are assigned to the Management department.

## Generate with Only Start and Stop Times

1. Clicking on this link, will display a report, similar to that below:

Torexretail

Administrator

Week 2 : 08 January 2007

Department Schedule Report

Home

Log off

Department Schedule Report

Store Name : 1229 : Birmingham

Week2 : 08/01/07

0001 : Management

Employee	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
Crenshaw, Pat	07:00 10:30	07:00 12:45		07:00 12:45		13:00 18:45	08:45 18:30	0.00
Mitchell, John	07:00 09:00		07:00 09:00	11:30 19:30	07:00 16:45	08:45 18:30		0.00
Smith, Katie	13:00 16:00	07:00 16:45	07:00 16:45		12:45 22:30		13:15 23:00	0.00
Smith, Ryan		08:30 11:00			13:15 23:00	13:15 23:00	07:00 11:00	0.00
Thomas, Ian	07:00 10:00	11:00 20:45	07:00 16:45	07:00 16:45			08:45 18:30	0.00
Totals	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

0002 : Store

Employee	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
Hobbs, Gareth	15:00 17:00	15:00 19:45	15:00 23:00			07:00 12:45		0.00
Jenkins, Pauline	07:00 09:00	07:00 09:15	07:00 12:45	07:00 15:00	07:00 15:00			0.00
Totals	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

0003 : Customer Service

Employee	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
Evans, Dorothy	17:30 23:00	16:15 22:00			18:30 22:45		18:30 23:00	0.00
Jones, Patrick	09:30 17:30	15:00 23:00	15:00 23:00	15:00 23:00	15:00 23:00			0.00
Phillips, Sonja			09:00 11:00	09:00 11:30	09:00 14:45	08:00 16:00	10:30 12:45	0.00
Powell, Grant	08:30 10:30		11:00 13:00	10:15 18:30	10:00 18:45			0.00

Export

Print

Home

Torexretail

### Department Schedule Report window

2. This report shows each department and the staff who are assigned to them. As the name suggests, it only shows the times that the staff members start and stop their shifts.

### Export

1. Clicking **Export** will convert the file into an Adobe Acrobat pdf document.

### Print

1. Clicking **Print**, will open a standard print dialog box.
2. Select the relevant printer and click **OK**.
3. The report will be printed.

### Generate with Breaks

1. Clicking on this link, will display a report, similar to that below:

## Department Schedule Report

Store Name : 1229 : Birmingham

Week2 : 08/01/07

## 0001 : Management

Employee	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
Crenshaw, Pat 0001 : Admin & Management	07:00 10:30	07:00 09:30 0002 : Cash Procedures		07:00 09:30 0002 : Cash Procedures		13:00 15:30 0006 : Cleaning	08:45 11:15 0005 : Shop Support	0.00
		09:30 09:45 Tea Break		09:30 09:45 Tea Break		15:30 15:45 Tea Break	11:15 11:30 Tea Break	
		09:45 12:45 0006 : Cleaning		09:45 12:45 0002 : Cash Procedures		15:45 18:45 0005 : Shop Support	11:30 14:15 0005 : Shop Support	
							14:15 14:30 Tea Break	
							14:30 15:30 0002 : Cash Procedures	
							15:30 16:00 Meal Break	
							16:00 18:30 0002 : Cash Procedures	
Mitchell, John 0001 : Admin & Management	07:00 09:00 0002 : Cash Procedures		07:00 09:00 0002 : Cash Procedures	11:30 13:15 0006 : Cleaning	07:00 09:30	08:45 11:15		0.00
				13:15 13:30	09:30 09:45	11:15 11:30		

Export

Print

Home

## Report window

- This report shows each department and the staff who are assigned to them. As the name suggests, it shows the times that the staff members start and stop their shifts, including any breaks.

## Export

- Clicking **Export** will convert the file into an Adobe Acrobat pdf document.

## Print

- Clicking **Print**, will open a standard print dialog box.
- Select the relevant printer and click **OK**.
- The report will be printed.

## Generate with Breaks and Task Changes

- Clicking on this link, will display a report, similar to that below:

## Department Schedule Report

Store Name : 1229 : Birmingham

Week2 : 08/01/07

## 0001 : Management

Employee	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
Crenshaw, Pat 0001 : Admin & Management	07:00 10:30	07:00 08:00 0002 : Cash Procedures		07:00 09:30 0002 : Cash Procedures		13:00 15:00 0006 : Cleaning	08:45 11:15 0005 : Shop Support	0.00
		08:00 09:30 0006 : Cleaning		09:30 09:45 Tea Break		15:00 15:30 0005 : Shop Support	11:15 11:30 Tea Break	
		09:30 09:45 Tea Break		09:45 12:45 0002 : Cash Procedures		15:30 15:45 Tea Break	11:30 11:45 0005 : Shop Support	
		09:45 11:00 0006 : Cleaning				15:45 18:00 0005 : Shop Support	11:45 14:15 0002 : Cash Procedures	
		11:00 12:45 0002 : Cash Procedures				18:00 18:45 0004 : Shop	14:15 14:30 Tea Break	
							14:30 15:30 0002 : Cash Procedures	
							15:30 16:00 Meal Break	
							16:00 18:30 0002 : Cash Procedures	
<a href="#">Export</a> <a href="#">Print</a> <a href="#">Home</a>								

## Report window

- This report shows each department and the staff who are assigned to them. As the name suggests, it shows the times that the staff members start and stop their shifts, including any breaks and Task changes.

## Export

- Clicking **Export** will convert the file into an Adobe Acrobat pdf document.

## Print

- Clicking **Print**, will open a standard print dialog box.
- Select the relevant printer and click **OK**.
- The report will be printed.

## Generate with Tasks, No Breaks

- Clicking on this link, will display a report, similar to that below:



Microsoft Internet Explorer window showing the **Torexretail** Department Schedule Report.

Address: http://70.4.1.76:9081/ePerformance/default.jsp

**Torexretail** Torex Administrator Week 18 : 27 July 2008 Department Schedule Report

**Department Schedule Report**

Store Name : DIV01 : NORTH  
Printed by : Torex Administrator

2008 MONTH 5  
Week 18 : 27/07/08  
Printed : 08 August 2008  
Schedule Last Updated: 08-Aug-2008 16:20:27

Filtered By Department and Task :  
Show DEPARTMENTS & TASKS

**Department - ND03 : CLUSTER 03**

Employee	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Total
Locke, Frankie 12 0057 : Sheffield Hillsborough		09:00 - 15:00	09:00 - 15:00					12.00
PROOR, JACKIE 0057 : Sheffield Hillsborough			09:00 - 17:30	09:00 - 17:30	09:00 - 17:30	09:00 - 17:30	09:00 - 17:30	40.00
NASH, JU Locum Non-Agency 134 0057 : Sheffield Hillsborough	00:00 - 24:00 Other Medical	00:00 - 24:00 Other Medical	00:00 - 24:00 Other Medical	00:00 - 24:00 Other Medical	09:00 - 12:00			14.00
POPOWIE, ANDY 0057 : Sheffield Hillsborough		08:30 - 17:30 0052 : Rotherham Howard Street	08:30 - 17:30 0052 : Rotherham Howard Street	08:30 - 17:30 0052 : Rotherham Howard Street	08:30 - 17:30 0052 : Rotherham Howard Street	08:30 - 17:30 0052 : Rotherham Howard Street		40.00
<b>Totals</b>	0.00	14.00	30.00	16.00	22.00	16.00	8.00	106.00

**Store Totals**

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Total
<b>Totals</b>	0.00	14.00	30.00	16.00	22.00	16.00	8.00	106.00

Buttons: Export, Print, Home

## Report window

- This report shows each department and the staff who are assigned to them. As the name suggests, it shows the times that the staff members start and stop their shifts and task changes, but excludes any breaks.
- The report also shows extra headings that can be configured\* to be visible on all versions of the report. They are:
  - Schedule Last Updated field - This shows either the start of the week scheduled if there have been no edits made to the schedule, or the date the schedule was last edited, if more recent
  - Show/Hide Departments & Tasks - Adding this option is useful where there is a large number of departments and/or tasks for the store that take up valuable space on the report screen as they can be hidden from view by clicking wording
  - Displaying which employees are contractors/temporary staff - Staff that are not permanent employees can be labeled as such in the 'Employee' Column underneath their name
  - Displaying an employee's base/average hours - Where an employee is scheduled on a rotation basis for example, shift workers, their schedule hours may be different each week. You can add the employees average weekly hours to the details in the 'Employee' column underneath their name

\*All of these options require setting up by an Administrator

## Export

- Clicking **Export** will convert the file into an Adobe Acrobat pdf document.

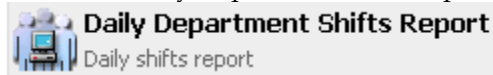
## Print

- Clicking **Print**, will open a standard print dialog box.
- Select the relevant printer and click **OK**.

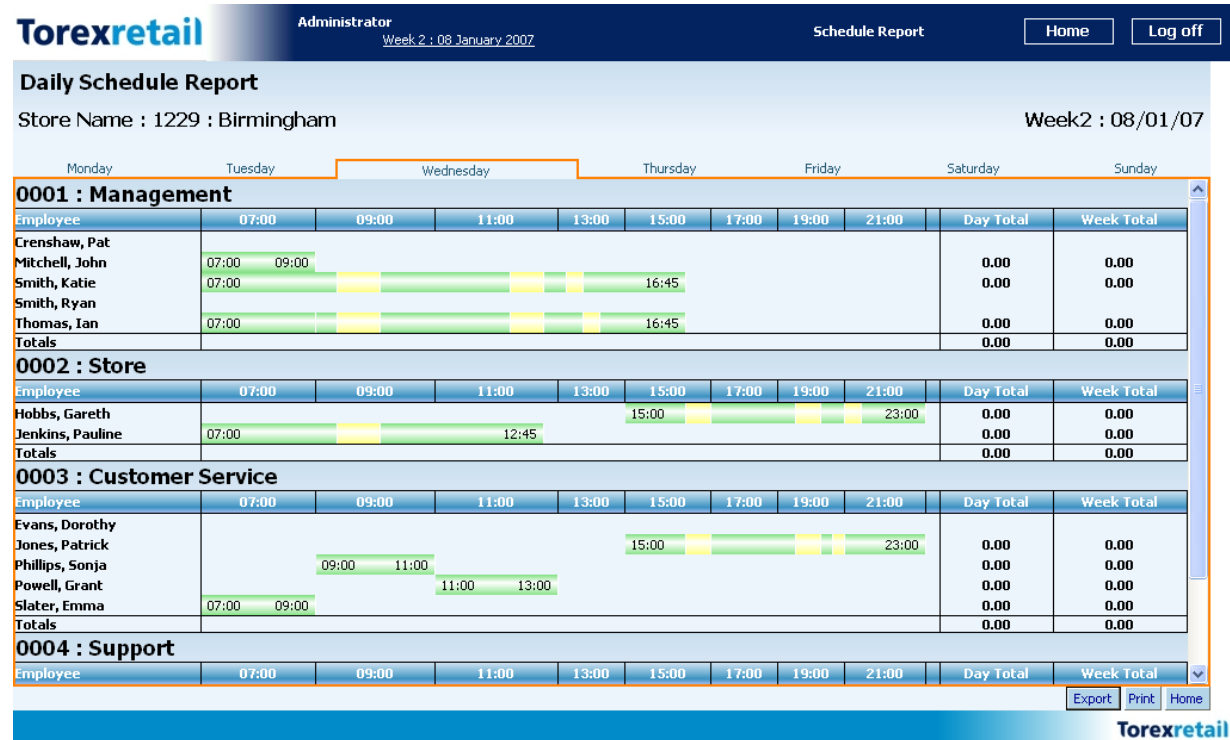
3. The report will be printed.

## Daily Department Shifts Report

1. To view a Daily Department Shifts report, click



2. A screen, similar to that below, will be displayed:



### Report window

3. This report shows each department and the members of staff assigned to them. It displays a visual representation of the hours the staff are working as well as their breaks.

### Export

1. Clicking **Export** will convert the file into an Adobe Acrobat pdf document.

### Print

1. Clicking **Print**, will open a standard print dialog box.
2. Select the relevant printer and click **OK**.
3. The report will be printed.

## Simple Schedule Report



### Simple Schedule Report

Departmental schedule listing report

1. To view a Simple Schedule Report, click
2. This will display a screen, similar to that below:

Torexretail

Administrator

Week 2 : 08 January 2007

Schedule Report

Home

Log off

Department Schedule Report

Store Name : 1229 : Birmingham

Week2 : 08/01/07

0001 : Management

Employee	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
Crenshaw, Pat	07:00 10:30	07:00 12:45		07:00 12:45		13:00 18:45	08:45 18:30	0.00
Mitchell, John	07:00 09:00		07:00 09:00	11:30 19:30	07:00 16:45	08:45 18:30		0.00
Smith, Katie	13:00 16:00	07:00 16:45	07:00 16:45		12:45 22:30		13:15 23:00	0.00
Smith, Ryan		08:30 11:00			13:15 23:00	13:15 23:00	07:00 11:00	0.00
Thomas, Ian	07:00 10:00	11:00 20:45	07:00 16:45	07:00 16:45			08:45 18:30	0.00
Totals	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

0002 : Store

Employee	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
Hobbs, Gareth	15:00 17:00	15:00 19:45	15:00 23:00			07:00 12:45		0.00
Jenkins, Pauline	07:00 09:00	07:00 09:15	07:00 12:45	07:00 15:00	07:00 15:00			0.00
Totals	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

0003 : Customer Service

Employee	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
Evans, Dorothy	17:30 23:00	16:15 22:00			18:30 22:45		18:30 23:00	0.00
Jones, Patrick	09:30 17:30	15:00 23:00	15:00 23:00	15:00 23:00	15:00 23:00			0.00
Phillips, Sonja			09:00 11:00	09:00 11:30	09:00 14:45	08:00 16:00	10:30 12:45	0.00
Powell, Grant	08:30 10:30		11:00 13:00	10:15 18:30	10:00 18:45			0.00

ExportPrintHome

Torexretail

### Report window

3. This report shows each department and the members of staff assigned to them, split by each day of the week.

### Export

1. Clicking **Export** will convert the file into an Adobe Acrobat pdf document.

### Print

1. Clicking **Print**, will open a standard print dialog box.
2. Select the relevant printer and click **OK**.
3. The report will be printed.

## Contract Report



### Contract Report

1. To view the Contract Report, click **Departmental schedule listing report** button.
2. This will display a screen, similar to that below:

Torexretail

Administrator

Week 2 : 08 January 2007

Schedule Report

Home

Log off

Department Contract Schedule Report

Store Name : 1229 : Birmingham

Week2 : 08/01/07

0001 : Management

Employee	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
Crenshaw, Pat	20:00 22:00	11:45 13:45		15:00 23:00	07:15 17:00	07:00 16:45		0.00
Mitchell, John	17:15 19:15		07:00 09:00	07:00 15:00	13:15 23:00	13:15 23:00		0.00
Smith, Katie	09:30 12:30	07:00 16:45	07:00 16:45	08:45 18:30	13:15 23:00			0.00
Smith, Ryan	07:00 09:30	07:00 11:00			13:15 23:00	13:15 23:00		0.00
Thomas, Ian	14:15 17:15	13:15 23:00	13:15 23:00	13:15 23:00	07:00 16:45			0.00
Totals	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

0002 : Store

Employee	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
Hobbs, Gareth	18:00 23:00	15:00 23:00	15:00 23:00					0.00
Jenkins, Pauline	07:00 09:00	09:00 11:00	08:30 15:00	07:00 15:00	07:00 15:00			0.00
Totals	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

0003 : Customer Service

Employee	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
Evans, Dorothy	15:00 20:00	15:00 23:00		15:00 23:00				0.00
Jones, Patrick	09:30 17:30	15:00 23:00	15:00 23:00	15:00 23:00	15:00 23:00			0.00
Phillips, Sonja	09:00 11:00		09:00 11:00	09:00 11:00	09:00 13:45	09:00 18:45		0.00
Powell, Grant	11:00 13:00		11:00 13:00	11:15 18:30	13:15 23:00			0.00

ExportPrintHome

Torexretail

### Report window

3. This report shows each department and the members of staff assigned to them, split by each day of the week.


### Export

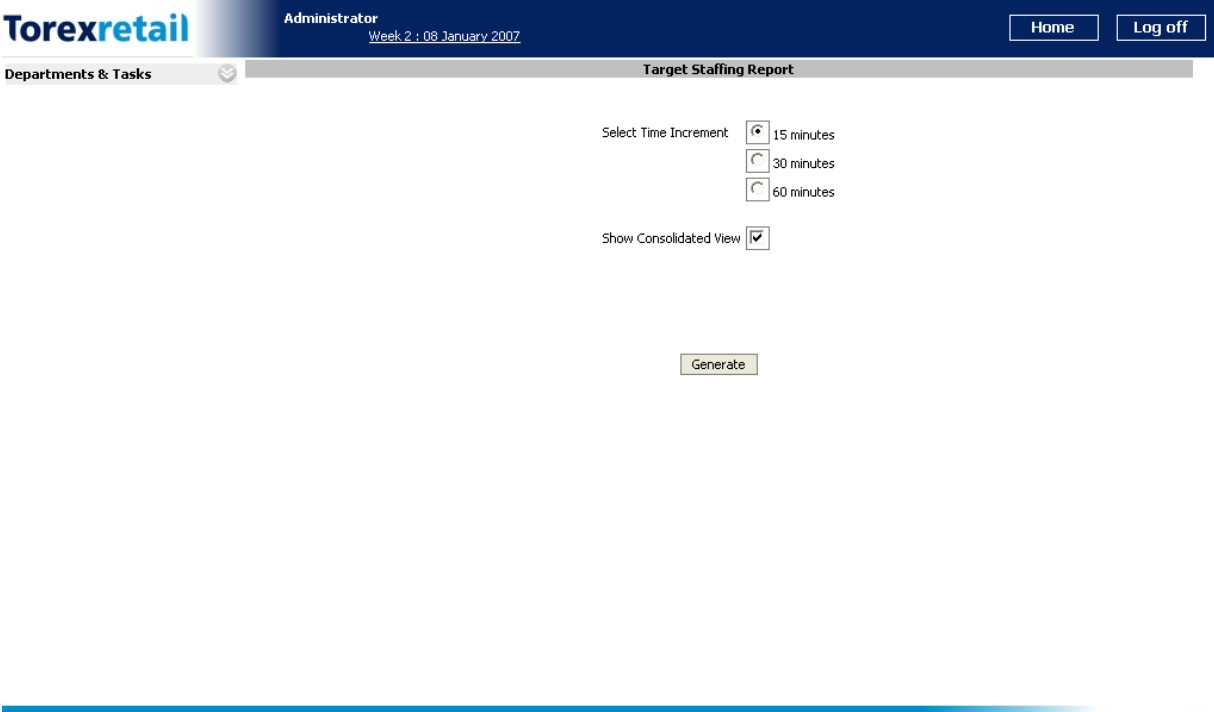
1. Clicking **Export** will convert the file into an Adobe Acrobat pdf document.

### Print

1. Clicking **Print**, will open a standard print dialog box.
2. Select the relevant printer and click **OK**.
3. The report will be printed.

## Target Staffing Report

1. To view the Target Staffing Report, click  **Target Staffing Report** Compare schedule fit with workload .
2. This will display a screen, similar to that below:



**Torexretail** Administrator Week 2 : 08 January 2007 Home Log off

Departments & Tasks Target Staffing Report

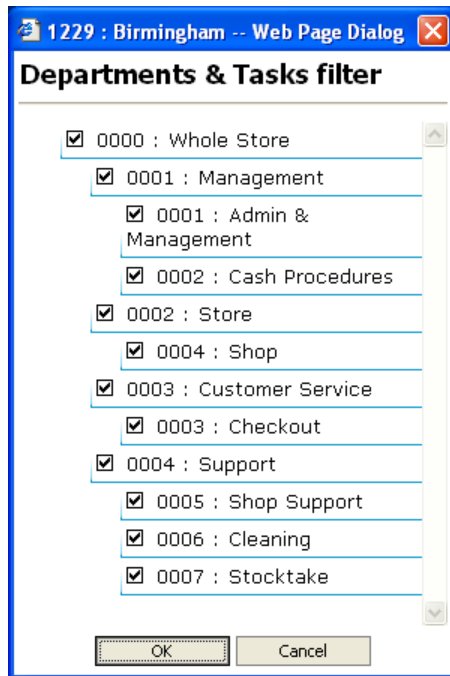
Select Time Increment ☒ 15 minutes  
☐ 30 minutes  
☐ 60 minutes

Show Consolidated View ☒

Generate

### Target Staffing Report window

3. Clicking **Departments & Tasks** link, on the left hand side of the screen, will display a window, similar to that below:



**Departments & Tasks Filter window**

4. Ticking and unticking the boxes allows you to limit or increase the number of staff displayed on screen at once, for example, ticking the **Management** box would only show those members of staff who are assigned to the Management department.
5. Select the appropriate **Time Increment** and tick whether you want to **Show Consolidated View**.
6. When ready, click **Generate**.
7. This will display a report, which shows whether you have enough staff working each shift.

Any shifts which are overstaffed are displayed in Red, Understaffed in Amber, whilst correctly covered shifts are displayed in Green.

Torexretail

ADMINISTRATOR  
Week 42 : 11 February 2007

Target Staffing Report

Home

Log off

Print

Back

Store Name : 00771 : 00771 - PCW: MANCHESTER

Report Title : Target Staffing Report

Printed By : ADMINISTRATOR

Filtered By :

2006 Period 11

Week 42 : 11/02/07

Printed : 13 February 2007

All

tasks

Time	Schedule Fit													
	Sunday		Monday		Tuesday		Wednesday		Thursday		Friday		Saturday	
	Allowed	Over By	Allowed	Over By	Allowed	Over By	Allowed	Over By	Allowed	Over By	Allowed	Over By	Allowed	Over By
Totals	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
0001 : Non Task														
0002 : Management														
08:00	0	0	1	-1	1	-1	1	-1	0	0	0	0	0	0
08:15	0	0	1	-1	1	-1	1	-1	0	0	0	0	0	0
08:30	0	0	1	-1	1	-1	1	-1	0	0	0	0	0	0
08:45	0	0	1	-1	1	-1	1	-1	0	0	0	0	0	0
09:00	0	0	1	-1	1	-1	1	-1	0	0	0	0	0	0
09:15	0	0	1	-1	1	-1	1	-1	0	0	0	0	0	0
09:30	0	0	1	-1	1	-1	1	-1	0	0	0	0	0	0
09:45	0	0	1	-1	1	-1	1	-1	0	0	0	0	0	0
10:00	1	-1	1	-1	1	-1	1	-1	0	0	0	0	0	0
10:15	1	-1	1	-1	1	-1	1	-1	0	0	0	0	0	0
10:30	1	-1	1	-1	1	-1	1	-1	0	0	0	0	0	0
10:45	1	-1	1	-1	1	-1	1	-1	0	0	0	0	0	0
11:00	1	-1	1	-1	1	-1	1	-1	0	0	0	0	0	0
11:15	1	-1	1	-1	1	-1	1	-1	0	0	0	0	0	0
11:30	1	-1	1	-1	1	-1	1	-1	0	0	0	0	0	0
11:45	1	-1	1	-1	1	-1	1	-1	0	0	0	0	0	0
12:00	1	-1	1	-1	1	-1	1	-1	0	0	0	0	0	0
12:15	1	-1	1	-1	1	-1	1	-1	0	0	0	0	0	0
12:30	1	-1	1	-1	1	-1	1	-1	0	0	0	0	0	0
12:45	1	-1	1	-1	1	-1	1	-1	0	0	0	0	0	0
13:00	1	-1	1	-1	1	-1	1	-1	0	0	0	0	0	0
13:15	1	-1	1	-1	1	-1	1	-1	0	0	0	0	0	0
13:30	1	-1	1	-1	1	-1	1	-1	0	0	0	0	0	0
13:45	1	-1	1	-1	1	-1	1	-1	0	0	0	0	0	0
14:00	1	-1	1	-1	1	-1	1	-1	0	0	0	0	0	0
14:15	1	-1	1	-1	1	-1	1	-1	0	0	0	0	0	0
14:30	1	-1	1	-1	1	-1	1	-1	0	0	0	0	0	0
14:45	1	-1	1	-1	1	-1	1	-1	0	0	0	0	0	0
15:00	1	-1	1	-1	1	-1	1	-1	0	0	0	0	0	0
15:15	1	-1	1	-1	1	-1	0	0	0	0	0	0	0	0
15:30	1	-1	1	-1	1	-1	0	0	0	0	0	0	0	0
15:45	1	-1	1	-1	1	-1	0	0	0	0	0	0	0	0

If you need assistance, please contact the Service Desk on 01438 848080

Torexretail

If you need assistance, please contact the Service Desk on 01 438 848080

Torexretail

## Report window

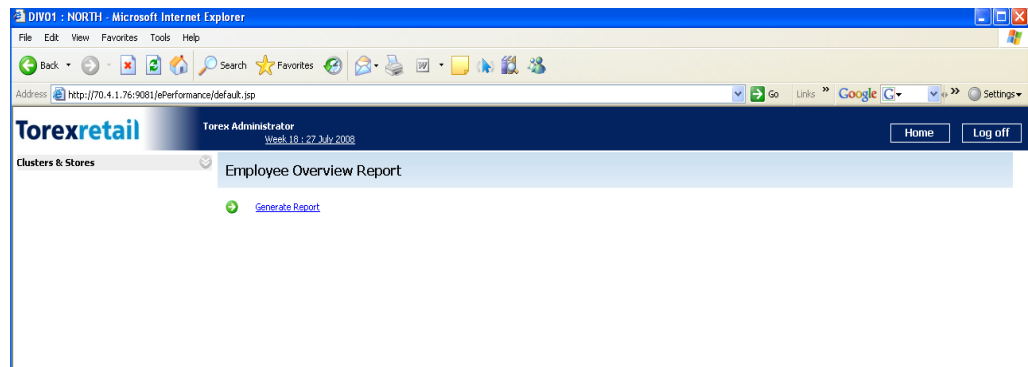
### Print

1. Clicking **Print**, will open a standard print dialog box.
2. Select the relevant printer and click **OK**.
3. The report will be printed.

## Employee Overview Report

The Employee Overview Report is a simple report detailing which employees are working in which departments, on which tasks each day. The report displays shift start and end times under each employees name.

1. To navigate to the report generate page, go to
2. Reports, Scheduling Reports and select Employee Overview Report.
3. You will see a screen similar to that below:



### Employee Overview Report window

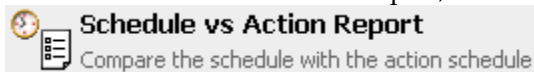
4. Select which Departments and Tasks you wish to be displayed on the report by clicking heading underneath the store logo
5. Tick or un-tick Departments and/or Tasks to make your filter selections
6. Click Generate Report link.
7. This will open up the report. See below:

Store	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
0020		WILLIS, BRUCE 08:30 - 17:30	SMITH, MIKE 08:30 - 17:30 WILLIS, BRUCE 08:30 - 17:30	SMITH, MIKE 08:30 - 17:30 WILLIS, BRUCE 08:30 - 17:30	SMITH, MIKE 08:30 - 17:30 WILLIS, BRUCE 08:30 - 17:30	SMITH, MIKE 08:30 - 17:30	SMITH, MIKE 08:30 - 17:30
0032		BROWN, BECKY 08:30 - 17:30	WRIGHT, NEIL 12:00 - 17:00 WRIGHT, SUSAN 12:00 - 17:00 BROWN, BECKY 08:30 - 17:30	WRIGHT, NEIL 12:00 - 17:00 WRIGHT, SUSAN 12:00 - 17:00 BROWN, BECKY 08:30 - 17:30	BROWN, BECKY 08:30 - 17:30	WRIGHT, SUSAN 12:00 - 17:00	
0034			PARKER, PETER 11:00 - 16:45	CHILLOH, BOB 08:30 - 17:30	CHILLOH, BOB 08:30 - 17:30	CHILLOH, BOB 08:30 - 17:30	
0036					NASH, JU Locum Non-Agency 12:00 - 15:00		
0041		SMITH, MARK 09:00 - 18:00	SMITH, MARK 09:00 - 18:00	SMITH, MARK 09:00 - 18:00	SMITH, MARK 09:00 - 18:00	SMITH, MARK 09:00 - 18:00	
0045		JOHNSTON, JANE 08:30 - 17:30 ANDREWS, LILIE 10:00 - 15:00	HASSELOFF, DAVINA 08:30 - 17:30 ANDREWS, LILIE 10:00 - 15:00	HASSELOFF, DAVINA 08:30 - 17:30	HASSELOFF, DAVINA 08:30 - 17:30	HASSELOFF, DAVINA 08:30 - 17:30 JOHNSTON, JANE 08:30 - 17:30	HASSELOFF, DAVINA 08:30 - 17:30 JOHNSTON, JANE 08:30 - 17:30
		TAYLOR, STEVE 08:00 - 16:00 WALKER, WAYNE 08:00 - 16:15	WALKER, WAYNE 08:00 - 17:00 MAGAMBO, THEO 08:30 - 17:30	TAYLOR, STEVE 08:00 - 16:00 WALKER, WAYNE 08:00 - 16:00	GOODYEAR, TYRA 08:00 - 17:30 MAGAMBO, THEO 08:30 - 17:30	GOODYEAR, TYRA 08:00 - 17:30 BALL, BOBBY 08:30 - 17:30	BALL, BOBBY 08:30 - 17:30 PUNTER, JASON 08:30 - 17:30

### Report window

## Schedule vs Action Report

1. To view a Schedule vs Action Report, click



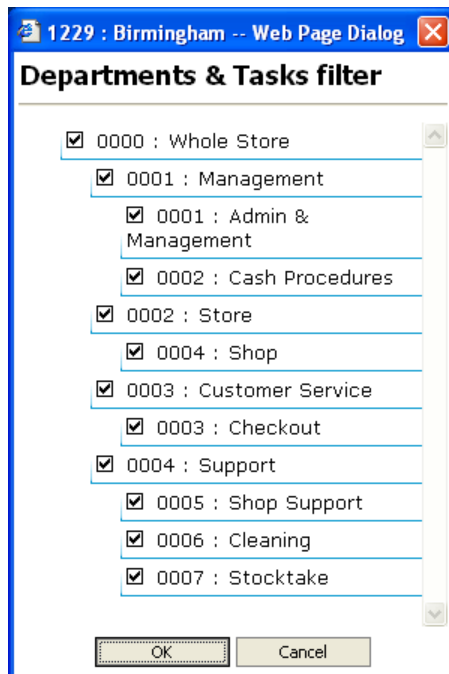
2. This will display a screen, similar to that below:



[Generate](#)

### Schedule Vs Action Report window

- Clicking **Departments & Tasks** link, on the left hand side of the screen, will display a window, similar to that below:



### Departments & Tasks Filter window

- Ticking and unticking the boxes allows you to limit or increase the number of staff displayed on screen at once, for example, ticking the **Management** box would only show those members of staff who are assigned to the Management department.

- Click **Generate** to prepare the report.

**Torexretail**
Administrator
Week 2 : 08 January 2007

Home

Log off

Print

Back

Store Name : 1229 : Birmingham  
Report Title : Schedule Vs Action Report  
Printed By : Administrator  
Filtered By :

tasks

All

2007 1  
Week 2 : 08/01/07  
Printed : 10 January 2007

Task : 0001 : Admin & Management

Employee	08/01/07 Sched - Actn	09/01/07 Sched - Actn	10/01/07 Sched - Actn	11/01/07 Sched - Actn	12/01/07 Sched - Actn	13/01/07 Sched - Actn	14/01/07 Sched - Actn	Hours Sched - Actn
Crenshaw, Pat	07:00 - 10:30 -	07:00 - 09:30 - 09:45 - 12:45 -		07:00 - 09:30 - 09:45 - 12:45 -		13:00 - 15:30 - 15:45 - 18:45 -	08:45 - 11:15 - 11:30 - 14:15 - 14:30 - 15:30 - 16:00 - 18:30 -	30.50 - 0.00
Totals	3.50 - 0.00	5.75 - 0.00	0.00 - 0.00	5.75 - 0.00	0.00 - 0.00	5.75 - 0.00	9.75 - 0.00	
Mitchell, John	07:00 - 09:00 -		07:00 - 09:00 -	11:30 - 13:15 - 13:30 - 16:15 - 16:30 - 17:30 - 18:00 - 19:30 -	07:00 - 09:30 - 09:45 - 12:30 - 12:45 - 13:45 - 14:15 - 16:45 -	08:45 - 11:15 - 11:30 - 14:15 - 14:30 - 15:30 - 16:00 - 18:30 -		31.50 - 0.00
Totals	2.00 - 0.00	0.00 - 0.00	2.00 - 0.00	8.00 - 0.00	9.75 - 0.00	9.75 - 0.00	0.00 - 0.00	
Smith, Katie	13:00 - 16:00 -	07:00 - 09:30 - 09:45 -	07:00 - 09:30 - 09:45 -		12:45 - 15:15 - 15:30 -		13:15 - 15:45 - 16:00 -	42.00 - 0.00

#### Report window

- The report displays a list of all of the employees in the store, showing the scheduled hours and the actual hours worked.

#### Print

- Clicking **Print**, will open a standard print dialog box.
- Select the relevant printer and click **OK**.
- The report will be printed.

## Management Cover Report



- To view the Management Cover Report, click
- A screen, similar to that below, will be displayed:

Store Name : 1229 : Birmingham

Report Title : Skills Report

Printed By : Administrator







Filtered By :

2007 1

Week 2 : 08/01/07

Printed : 10 January 2007

## Default

Monday	00:00	01:00	02:00	03:00	04:00	05:00	06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00
No Cover																								
Tuesday	00:00	01:00	02:00	03:00	04:00	05:00	06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00
No Cover																								
Wednesday	00:00	01:00	02:00	03:00	04:00	05:00	06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00
No Cover																								
Thursday	00:00	01:00	02:00	03:00	04:00	05:00	06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00
No Cover																								
Friday	00:00	01:00	02:00	03:00	04:00	05:00	06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00
No Cover																								
Saturday	00:00	01:00	02:00	03:00	04:00	05:00	06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00
No Cover																								
Sunday	00:00	01:00	02:00	03:00	04:00	05:00	06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00

## Report window

3. This report displays a graphical representation of management cover in the store for example, the bars will be green, when there is cover.

## Print

1. Clicking **Print**, will open a standard print dialog box.
2. Select the relevant printer and click **OK**.
3. The report will be printed.

## Daily/Weekly Planning Sheet

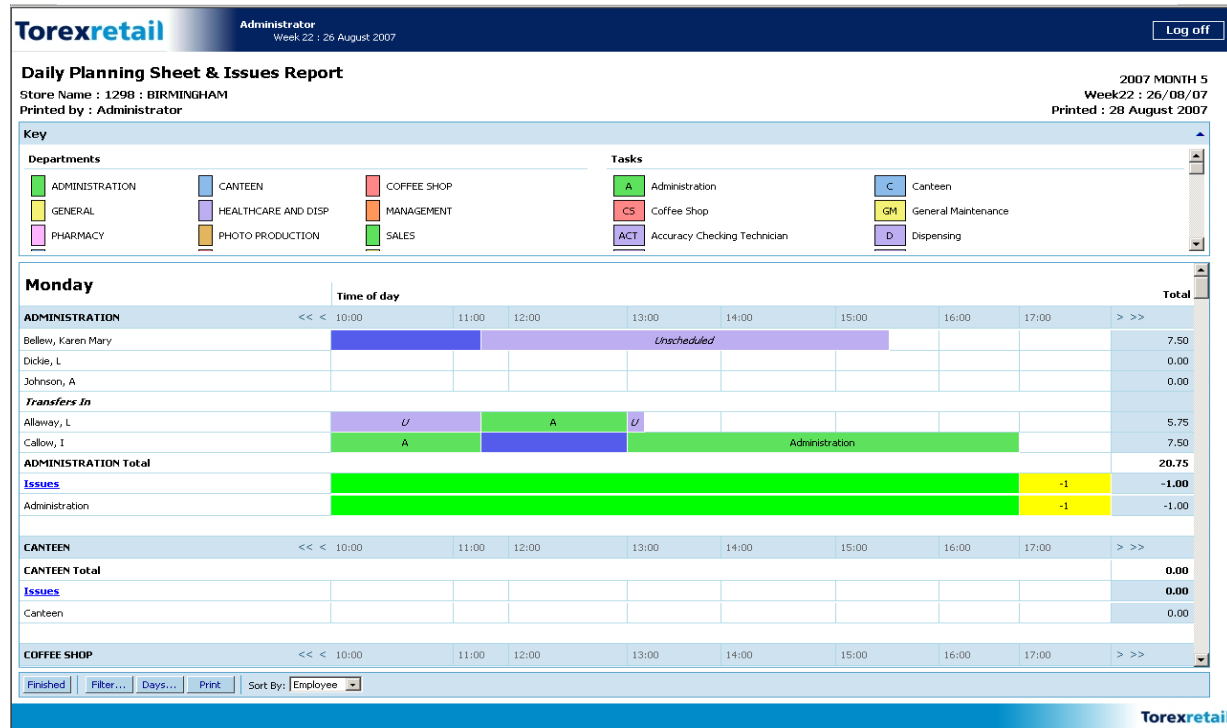
1. To view the Daily Planning Sheet, click



Daily Planning Sheet

View daily departmental shifts and issues

2. A screen, similar to that below, will be displayed:



### Report window

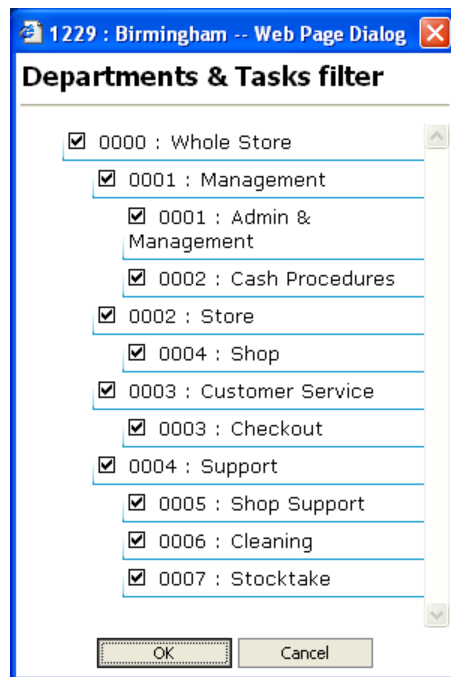
- At the top of the report is a key showing each department and task and the colors assigned to them for use within this report. Underneath this is the report itself displaying a timeline of hours across the top and employees down the side. These are sorted by department, with an issue summary under each showing whether there is a shortage (yellow), overage (red) or match (green) of staff for each task throughout the day. Clicking [Issues](#) link will bring you to the Schedule Issues screen (see page 205).
- Alongside each employee's name it will show their shift for the day (if there is one), the task(s) they are scheduled to perform, and the break(s) they have been assigned. (Breaks being visible are dependent on what is selected in the Report Settings box – see below) If an employee has been brought in to work from another department for the day, they will be listed under the *Transfers In* section. On the right of the screen it shows the total hours for each employee for the day, and the total for the department.
- Clicking < & > buttons will bring the timeline back and forward 1 hour respectively, while clicking << & >> will bring it back and forward 2 hours respectively. (However these time settings are configurable). The ▲ button at the right of the key will hide it from view, allowing more of the report to be shown on screen.

### Sort By

- You can choose to either display employees alphabetically within their home department or 'In For Day' which will sort them according to the start of their shift on the day in question.

## Filter

1. Clicking **Filter...**, at the bottom of the screen, will display a window, similar to that below:

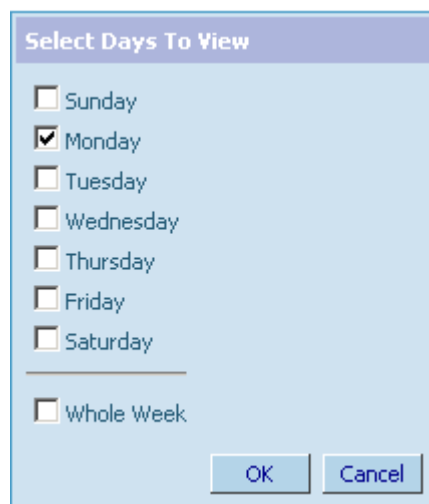


**Departments & Tasks Filter window**

2. Ticking and un-ticking the boxes allows you to limit or increase the number of departments and tasks displayed on screen at once, for example, ticking the **Management** box would only show the Management department and those members of staff who are assigned tasks within it.

## Days

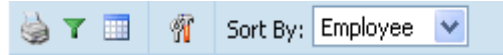
1. Clicking **Days...**, at the bottom of the screen, will display the following window:



**Select Days to View window**

2. By ticking on each day you can chose which you wish to be shown on the report, or by ticking **Whole Week** you can display every day. Each day will be listed separately and you must scroll down to see them.


Note, some versions of this report have a toolbar at the top of the screen like that below, instead of the buttons at the bottom, however they function in the same way:

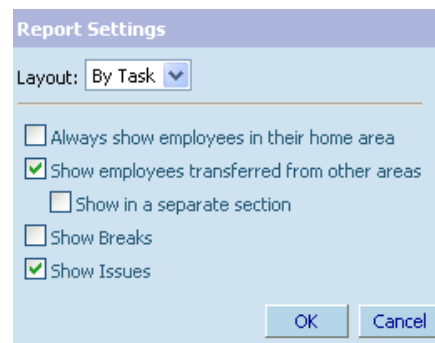


#### Toolbar window

Reports with the toolbar have an additional 'Report Settings' Option:

#### Report Settings Options

Clicking  icon brings up the pop up box below:





#### Report Settings window

Ticking or un-ticking the boxes and clicking OK allows you to select various view and layout options for display on the report.


#### Print

1. Clicking **Print**, will open a standard print dialog box.
2. Select the relevant printer and click **OK**.
3. The report will be printed.

## Time & Attendance Reports

1. To access the **Time & Attendance Reports**, click  **Reports** System reporting suite button and then the  **Time & Attendance Reports** View actual data reports button.

### T&A Report

1. To run a **T&A Report**, click  **T&A Report** T&A IN/OUT Report button.
2. A screen will be displayed, which will appear similar to that below:

## Department Actual Schedule Report

Store Name : 1229 : Birmingham

Week2 : 08/01/07

## 0001 : Management

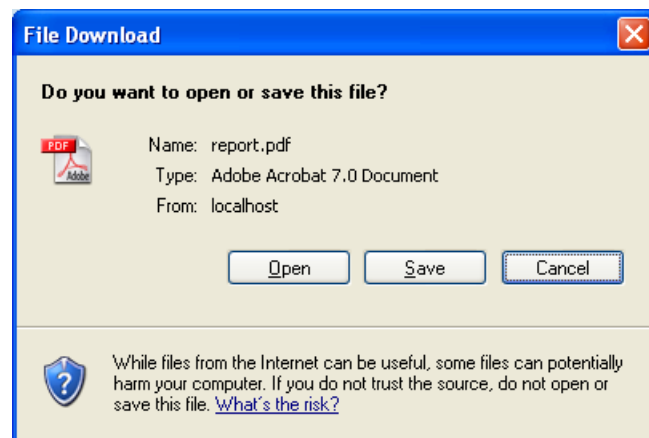
Employee	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
Totals	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Store Totals								
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Total
Totals	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Export Print Home

## Report window

## Export

1. Clicking **Export**, at the bottom of the screen, will display a window, similar to that below:



## File Download window

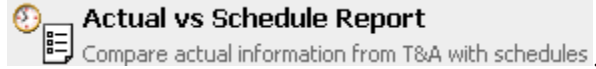
2. Clicking **Open** will display the contents of the T&A Report in the Adobe Acrobat pdf format.
3. Clicking **Save** will enable you to save the exported file onto your computer, to be viewed at a later time.
4. Clicking **Cancel** will stop the export process and return you to the T&A Report screen.

## Print

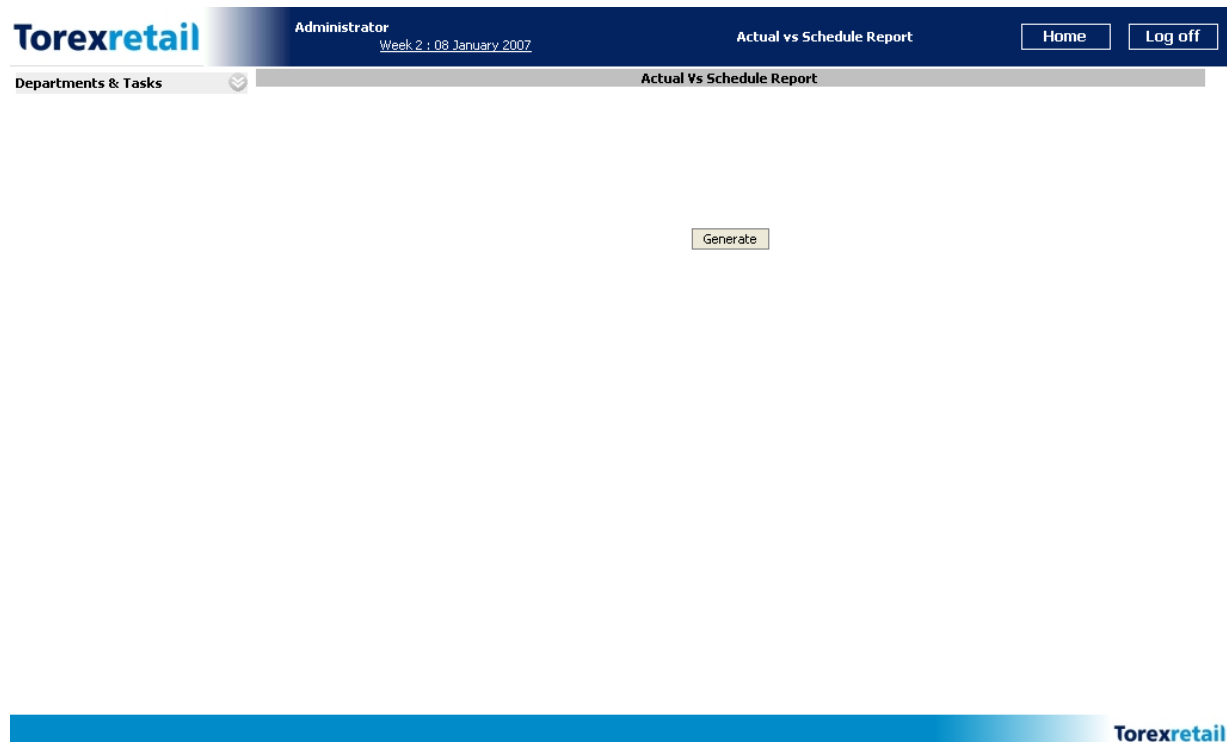
1. Clicking **Print** will display a standard print dialog box.
2. Select the appropriate printer in your list and then click **OK** to send the report to the printer.

## Actual vs Schedule Report

1. To view the Actual vs Schedule Report, click



2. A screen, similar to that below, will be displayed:



### Actual Vs Schedule window

3. Clicking **Departments & Tasks** link, on the left hand side of the screen, will display a window, similar to that below:



1229 : Birmingham -- Web Page Dialog

### Departments & Tasks filter

- ☒ 0000 : Whole Store
  - ☒ 0001 : Management
    - ☒ 0001 : Admin & Management
    - ☒ 0002 : Cash Procedures
  - ☒ 0002 : Store
    - ☒ 0004 : Shop
  - ☒ 0003 : Customer Service
    - ☒ 0003 : Checkout
  - ☒ 0004 : Support
    - ☒ 0005 : Shop Support
    - ☒ 0006 : Cleaning
    - ☒ 0007 : Stocktake

OK Cancel

Department & Tasks Filter window

4. Ticking and unticking the boxes allows you to limit or increase the number of staff displayed on screen at once, for example, ticking the **Management** box would only show those members of staff who are assigned to the Management department.
5. Click **Generate** to prepare the report.

**Torexretail** Administrator Week 2 : 08 January 2007 Home Log off

Print Back

Store Name : 1229 : Birmingham  
 Report Title : Actual Vs Schedule Report  
 Printed By : Administrator  
 Filtered By : tasks

2007 1  
 Week 2 : 08/01/07  
 Printed : 10 January 2007

All

Task : 0001 : Admin & Management

Employee	08/01/07 Actl - Schd	09/01/07 Actl - Schd	10/01/07 Actl - Schd	11/01/07 Actl - Schd	12/01/07 Actl - Schd	13/01/07 Actl - Schd	14/01/07 Actl - Schd	Hours Actl - Schd
Crenshaw, Pat	- 07:00 - 10:30	- 07:00 - 09:30 - 09:45 - 12:45		- 07:00 - 09:30 - 09:45 - 12:45		- 13:00 - 15:30 - 15:45 - 18:45	- 08:45 - 11:15 - 11:30 - 14:15 - 14:30 - 15:30 - 16:00 - 18:30	0.00 - 30.50
<b>Totals</b>	<b>0.00 - 3.50</b>	<b>0.00 - 5.75</b>	<b>0.00 - 0.00</b>	<b>0.00 - 5.75</b>	<b>0.00 - 0.00</b>	<b>0.00 - 5.75</b>	<b>0.00 - 9.75</b>	
Mitchell, John	- 07:00 - 09:00		- 07:00 - 09:00	- 11:30 - 13:15 - 13:30 - 16:15 - 16:30 - 17:30 - 18:00 - 19:30	- 07:00 - 09:30 - 09:45 - 12:30 - 12:45 - 13:45 - 14:15 - 16:45	- 08:45 - 11:15 - 11:30 - 14:15 - 14:30 - 15:30 - 16:00 - 18:30		0.00 - 31.50
<b>Totals</b>	<b>0.00 - 2.00</b>	<b>0.00 - 0.00</b>	<b>0.00 - 2.00</b>	<b>0.00 - 8.00</b>	<b>0.00 - 9.75</b>	<b>0.00 - 9.75</b>	<b>0.00 - 0.00</b>	
Smith, Katie	- 13:00 - 16:00	- 07:00 - 09:30 - 09:45	- 07:00 - 09:30 - 09:45		- 12:45 - 15:15 - 15:30		- 13:15 - 15:45 - 16:00	0.00 - 42.00

Torexretail

Report window

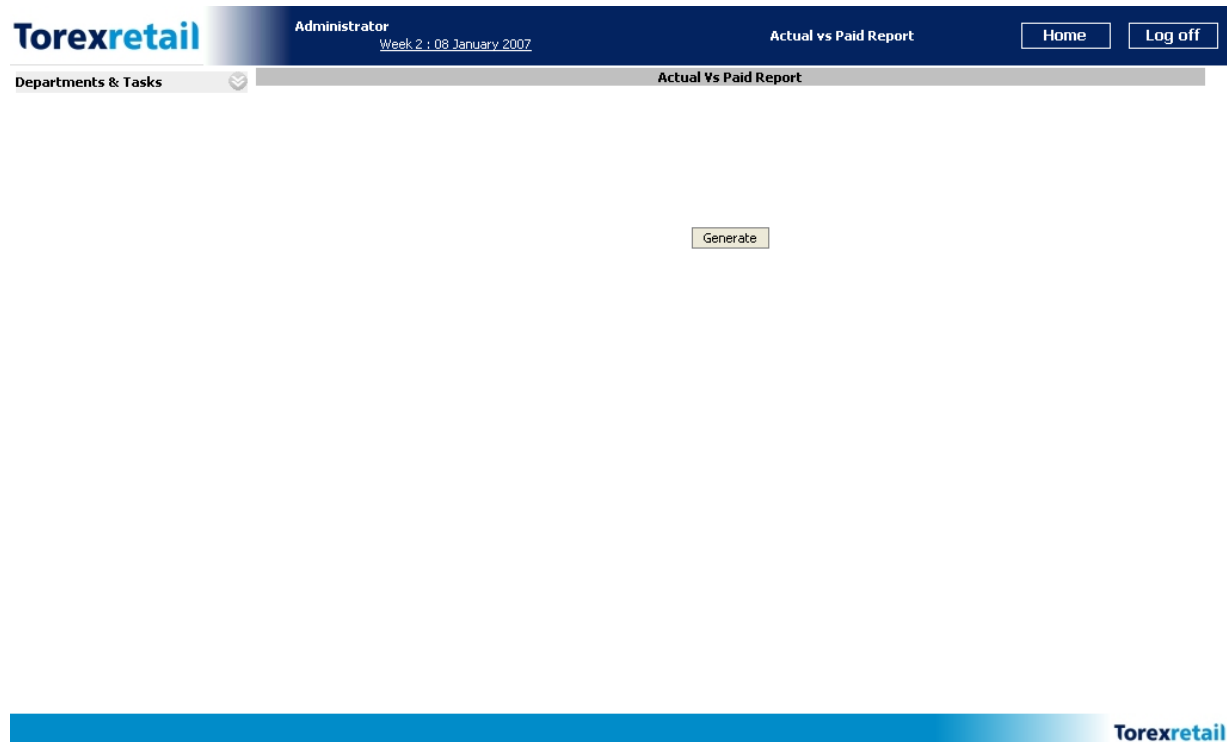
6. The report displays a list of all of the employees in the store, split by department, showing the scheduled hours and the actual hours worked.

### Print

1. Clicking **Print**, will open a standard print dialog box.
2. Select the relevant printer and click **OK**.
3. The report will be printed.

## Actual vs Paid Report

1. To view the Actual vs Paid Report, click



### Actual Vs Paid Report window

2. Clicking **Departments & Tasks** link, on the left hand side of the screen, will display a window, similar to that below:

1229 : Birmingham -- Web Page Dialog

### Departments & Tasks filter

- ☒ 0000 : Whole Store
  - ☒ 0001 : Management
    - ☒ 0001 : Admin & Management
    - ☒ 0002 : Cash Procedures
  - ☒ 0002 : Store
    - ☒ 0004 : Shop
  - ☒ 0003 : Customer Service
    - ☒ 0003 : Checkout
  - ☒ 0004 : Support
    - ☒ 0005 : Shop Support
    - ☒ 0006 : Cleaning
    - ☒ 0007 : Stocktake

OK Cancel

Departments & Tasks Filter window

3. Ticking and unticking the boxes allows you to limit or increase the number of staff displayed on screen at once, for example, ticking the **Management** box would only show those members of staff who are assigned to the Management department.
4. Click **Generate** to prepare the report.

**Torexretail** Administrator Week 2 : 08 January 2007 Home Log off

Print Back

Store Name : 1229 : Birmingham  
 Report Title : Actual Vs Paid Report  
 Printed By : Administrator  
 Filtered By : tasks

2007 1  
 Week 2 : 08/01/07  
 Printed : 10 January 2007

All

Task : 0001 : Admin & Management

Employee	08/01/07 Actl - Paid	09/01/07 Actl - Paid	10/01/07 Actl - Paid	11/01/07 Actl - Paid	12/01/07 Actl - Paid	13/01/07 Actl - Paid	14/01/07 Actl - Paid	Hours Actl - Paid
Crenshaw, Pat								0.00 - 0.00
Totals	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00
Mitchell, John								0.00 - 0.00
Totals	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00
Smith, Katie								0.00 - 0.00
Totals	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00
Thomas, Ian								0.00 - 0.00
Totals	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00
Summary								
Total Hours	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00	0.00 - 0.00	
Variances	0%	0%	0%	0%	0%	0%	0%	
Actual Hrs : 0.00 TASK VARIANCE (%): 0								
Paid Hrs : 0.00								

Task : 0002 : Cash Procedures

Torexretail

Report window

5. The report displays a list of all of the employees in the store, split by department, showing the actual hours worked and the paid hours.

### Print

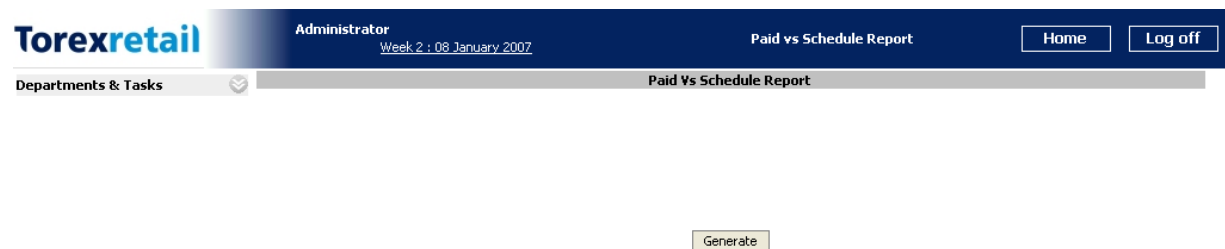
1. Clicking **Print**, will open a standard print dialog box.
2. Select the relevant printer and click **OK**.
3. The report will be printed.

## Paid vs Schedule Report

1. To view a Paid vs Schedule Report, click



2. A screen, similar to that below, will be displayed:



### Paid Vs Schedule Report window

3. Clicking **Departments & Tasks** link, on the left hand side of the screen, will display a window, similar to that below:

1229 : Birmingham -- Web Page Dialog

### Departments & Tasks filter

- ☒ 0000 : Whole Store
  - ☒ 0001 : Management
    - ☒ 0001 : Admin & Management
    - ☒ 0002 : Cash Procedures
  - ☒ 0002 : Store
    - ☒ 0004 : Shop
  - ☒ 0003 : Customer Service
    - ☒ 0003 : Checkout
  - ☒ 0004 : Support
    - ☒ 0005 : Shop Support
    - ☒ 0006 : Cleaning
    - ☒ 0007 : Stocktake

OK Cancel

Departments &Tasks Filter window

4. Ticking and unticking the boxes allows you to limit or increase the number of staff displayed on screen at once, for example, ticking the **Management** box would only show those members of staff who are assigned to the Management department.
5. Click **Generate** to prepare the report.

Torexretail

Administrator

Week 2 : 08 January 2007

Home

Log off

Print

Back

Store Name : 1229 : Birmingham

Report Title : Paid Vs Schedule Report

Printed By : Administrator

Filtered By :

tasks

All

2007 1

Week 2 : 08/01/07

Printed : 10 January 2007

Task : 0001 : Admin & Management

Employee	08/01/07 Paid - Schd	09/01/07 Paid - Schd	10/01/07 Paid - Schd	11/01/07 Paid - Schd	12/01/07 Paid - Schd	13/01/07 Paid - Schd	14/01/07 Paid - Schd	Hours Paid - Schd
Crenshaw, Pat	- 07:00 - 10:30	- 07:00 - 09:30 - 09:45 - 12:45		- 07:00 - 09:30 - 09:45 - 12:45		- 13:00 - 15:30 - 15:45 - 18:45	- 08:45 - 11:15 - 11:30 - 14:15 - 14:30 - 15:30 - 16:00 - 18:30	0.00 - 30.50
Totals	0.00 - 3.50	0.00 - 5.75	0.00 - 0.00	0.00 - 5.75	0.00 - 0.00	0.00 - 5.75	0.00 - 9.75	
Mitchell, John	- 07:00 - 09:00		- 07:00 - 09:00	- 11:30 - 13:15 - 13:30 - 16:15 - 16:30 - 17:30 - 18:00 - 19:30	- 07:00 - 09:30 - 09:45 - 12:30 - 12:45 - 13:45 - 14:15 - 16:45	- 08:45 - 11:15 - 11:30 - 14:15 - 14:30 - 15:30 - 16:00 - 18:30		0.00 - 31.50
Totals	0.00 - 2.00	0.00 - 0.00	0.00 - 2.00	0.00 - 8.00	0.00 - 9.75	0.00 - 9.75	0.00 - 0.00	
Smith, Katie	- 13:00 - 16:00	- 07:00 - 09:30 - 09:45	- 07:00 - 09:30 - 09:45		- 12:45 - 15:15 - 15:30		- 13:15 - 15:45 - 16:00	0.00 - 42.00

Torexretail

Report window

6. The report displays a list of all of the employees in the store, split by department, showing the paid hours and the scheduled hours worked.

### Print

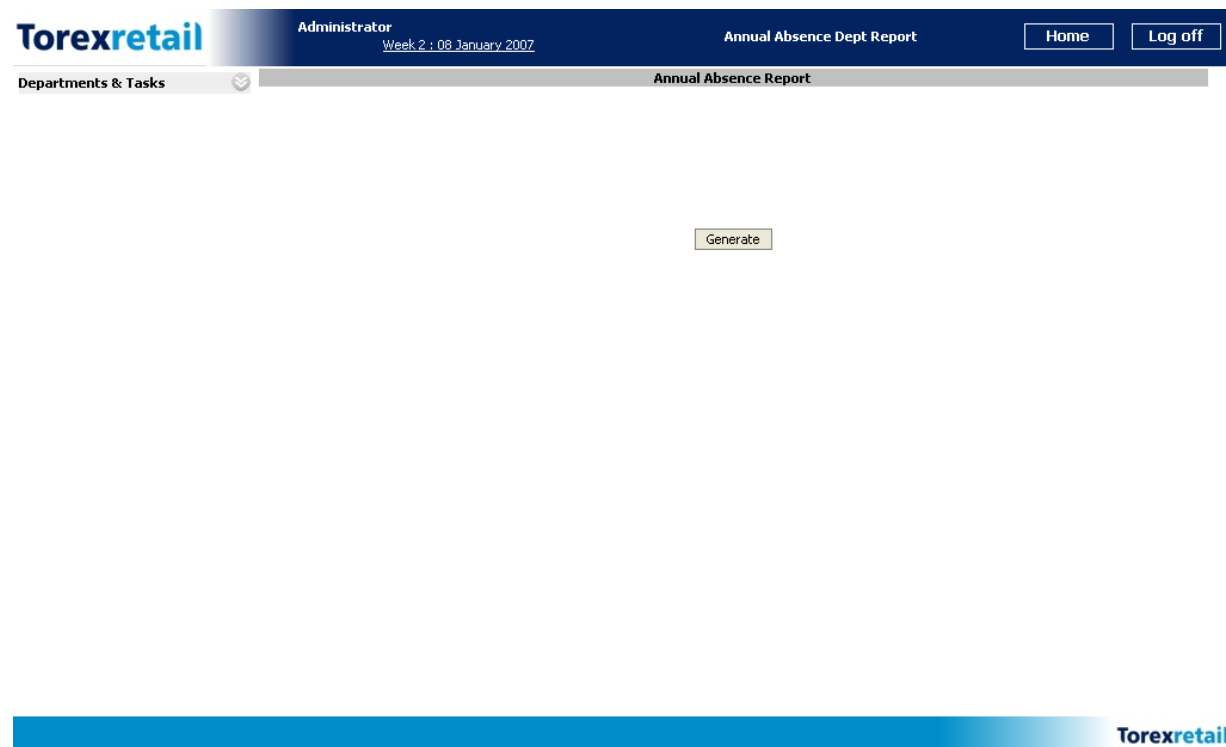
1. Clicking **Print**, will open a standard print dialog box.
2. Select the relevant printer and click **OK**.
3. The report will be printed.

## Annual Absence Dept Report

1. To view an Annual Absence Dept Report, click

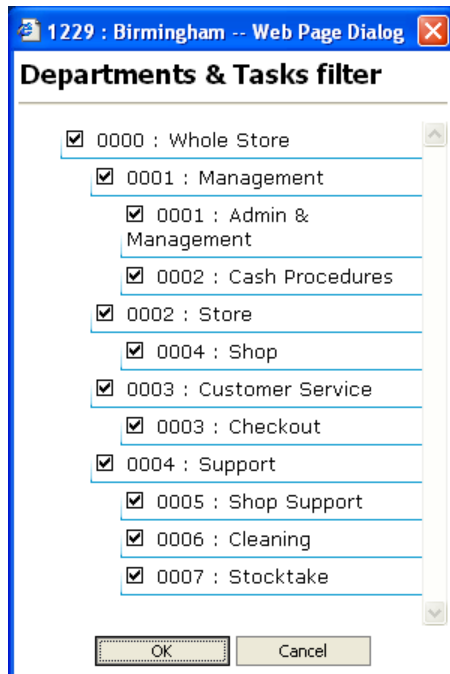


2. A screen, similar to that below, will be displayed:



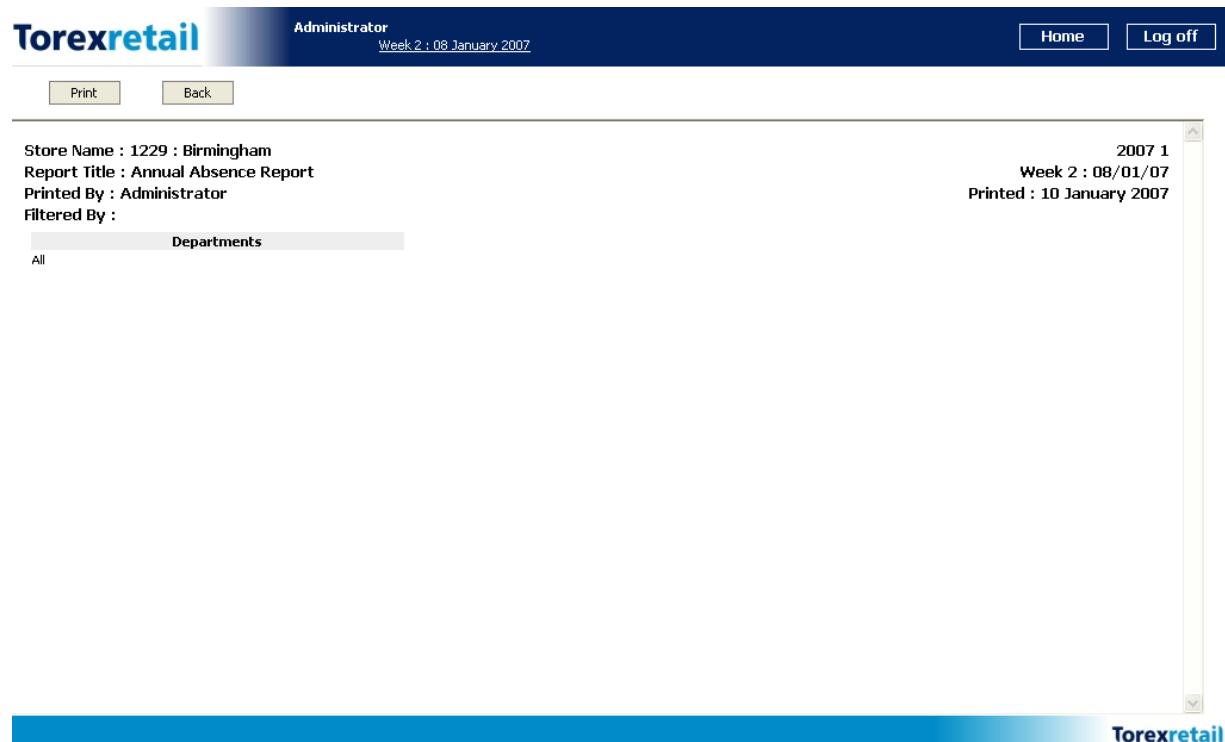
### Annual Absence Report window

3. Clicking **Departments & Tasks** link, on the left hand side of the screen, will display a window, similar to that below:



**Departments & Tasks Filter window**

4. Ticking and unticking the boxes allows you to limit or increase the number of staff displayed on screen at once, for example, ticking the **Management** box would only show those members of staff who are assigned to the Management department.
5. Click **Generate** to prepare the report.



**Report window**

6. The report displays a list of all of the employees in the store, showing their absences.

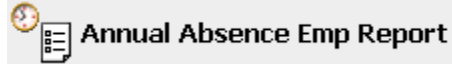
---

## Print

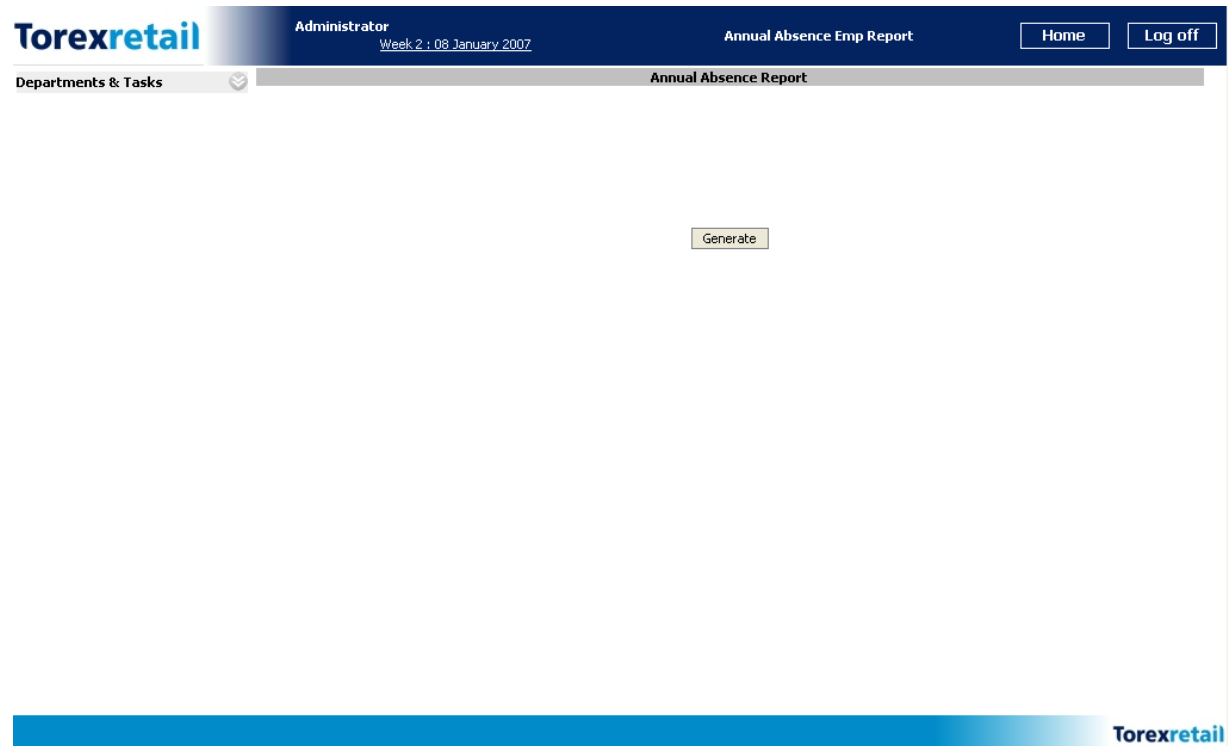
1. Clicking **Print**, will open a standard print dialog box.
2. Select the relevant printer and click **OK** button.
3. The report will be printed.

## Annual Absence Emp Report

1. To view the Annual Absence Emp Report, click



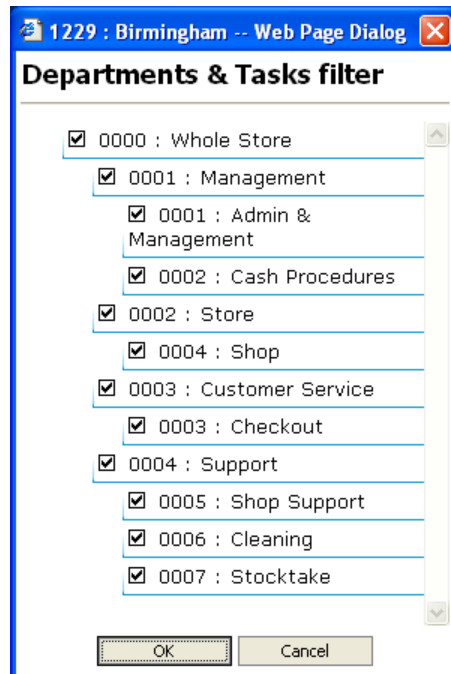
2. A screen, similar to that below, will be displayed:



### Annual Absence Report window

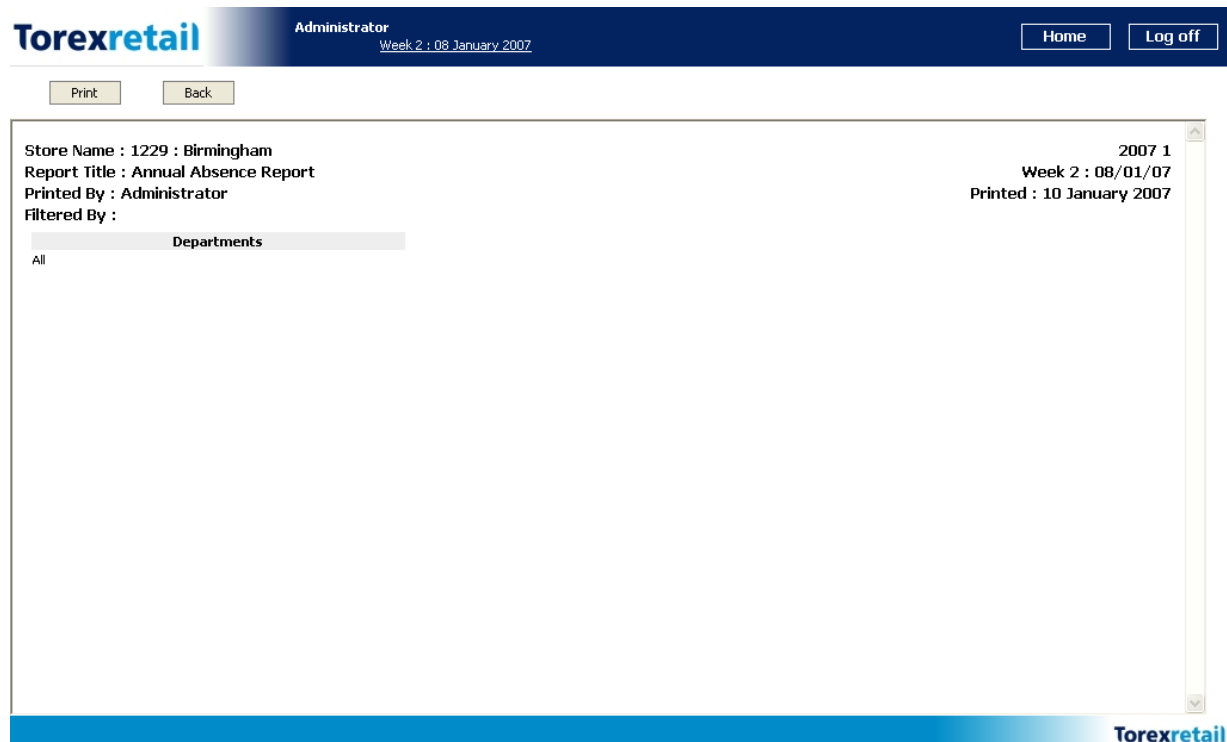
3. Clicking **Departments & Tasks** link, on the left hand side of the screen, will display a window, similar to that below:





**Departments & Tasks Filter window**

4. Ticking and unticking the boxes allows you to limit or increase the number of staff displayed on screen at once, for example, ticking the **Management** box would only show those members of staff who are assigned to the Management department.
5. Click **Generate** to prepare the report.




**Report window**

6. The report displays a list of all of the employees in the store, showing their absences.

## Print

1. Clicking **Print**, will open a standard print dialog box.
2. Select the relevant printer and click **OK**.
3. The report will be printed.

## Clocked in Report

1. To view the Clocked In Report, click  **Clocked in report**.
2. A screen, similar to that below, will be displayed:



TIME	IN	OUT
	Crenshaw, Pat : 104	
	Evans, Dorothy : 109	
	Fowler, Robert : 105	
	Hobbs, Gareth : 113	
	Jenkins, Pauline : 106	
	Jones, Patrick : 107	
	Mitchell, John : 103	
	Phillips, Sonja : 108	
	Powell, Grant : 110	
	Slater, Emma : 114	
	Smith, Katie : 102	
	Smith, Ryan : 112	
	Thomas, Ian : 101	

## Report window

3. This report shows a list of all employees, with the times that they have clocked in and out for that day.

## Comparison Reports

1. To view the Comparison Reports, click  **Comparison Reports** View reports to compare different plans.

## Actual vs Schedule Report

1. See page 268 for further information on the Actual vs Schedule Report.

## Paid vs Schedule Report

1. See page 272 for further information on the Paid vs Schedule Report.

---

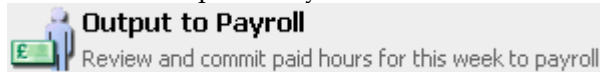
## **Schedule vs Action Report**

1. See page 259 for further information on the Schedule vs Action Report.



## Output to Payroll

1. To view the Output to Payroll module, click



## OTP Report

1. To view the OTP report, click
2. A screen, similar to that below, will be displayed:



<div> <div>Torexretail</div> <div> <div>Administrator</div> <div>Week 3 : 15 January 2007</div> </div> <div>OTP Report</div> <div> <div>Home</div> <div>Log off</div> </div> </div>								
<div> <div>Store Name : 1229 : Birmingham</div> <div>Report Title : OTP Summary Report</div> <div>Printed By : Administrator</div> <div>Filtered By :</div> </div> <div>2007 1</div> <div>Week 3 : 15/01/07</div> <div>Printed : 19 January 2007</div>								
Calculated OTP for Week 3 : 15/01/07								
Payroll	Name	Basic Rate	Overtime x 1.5	Night Rate @ 1/3rd	Night Rate @ 1.5	Bank Hol @ 1.5	Temp Payment	Absence
101	Thomas, Ian	35.50	4.00	0.00	0.00	0.00	0.00	0.00
102	Smith, Katie	20.00	0.00	0.00	0.00	0.00	0.00	0.00
103	Mitchell, John	35.50	0.00	0.00	0.00	0.00	0.00	0.00
104	Crenshaw, Pat	35.50	0.00	0.00	0.00	0.00	0.00	0.00
105	Fowler, Robert	35.50	0.00	0.00	0.00	0.00	0.00	0.00
106	Jenkins, Pauline	35.50	0.00	0.00	0.00	0.00	0.00	0.00
107	Jones, Patrick	35.50	0.00	0.00	0.00	0.00	0.00	0.00
108	Phillips, Sonja	35.50	0.00	0.00	0.00	0.00	0.00	0.00
109	Evans, Dorothy	35.50	0.00	0.00	0.00	0.00	0.00	0.00
110	Powell, Grant	9.50	4.00	0.00	0.00	0.00	0.00	0.00
112	Smith, Ryan	20.00	0.00	0.00	0.00	0.00	0.00	0.00
113	Hobbs, Gareth	35.50	0.00	0.00	0.00	0.00	0.00	0.00
114	Slater, Emma	35.50	0.00	0.00	0.00	0.00	0.00	0.00

Print

Torexretail

### Report window

3. The report shows the rates that employees have been paid, for the past week.

## Print

1. Clicking **Print**, will open a standard print dialog box.
2. Select the relevant printer and click **OK**.
3. The report will be printed.

## Corrections Report

1. To view the Corrections Report, click



### Corrections Report

Report corrections to committed OTP for current week

2. A screen, similar to that below, will be displayed:

**Torexretail** Administrator Week 1 : 02 January 2006 OTP Report [Home](#) [Log off](#)

Store Name : 1229 : Birmingham  
Report Title : OTP Summary Report  
Printed By : Administrator  
Filtered By :  
  
2006 1  
Week 1 : 02/01/06  
Printed : 17 January 2007

Edited OTP for Week 1 : 02/01/06  
Version 2 created 17 January 2007  
\*\*\* no comment \*\*\*

Payroll No.	Name	type	day1	day2	day3	day4	day5	day6	day7	total
101	Thomas, Ian	Overtime x 1.5	4.00	0.00	0.00	0.00	0.00	0.00	0.00	4.00

[Print](#)

**Torexretail**

### Report window

3. The report shows any changes which have been made to employees OTP details, for that week.

## Print

1. Clicking **Print**, will open a standard print dialog box.
2. Select the relevant printer and click **OK**.
3. The report will be printed.

## OTP Summary



1. To view the OTP Summary, click
2. A screen, similar to that below, will be displayed:

**Torexretail** Administrator Week 3 : 15 January 2007 OTP Summary [Log off](#)

< Previous This week Next >

Payroll	Name	Basic Rate	Overtime x 1.5	Night Rate @ 1/3rd	Night Rate @ 1.5	Bank Hol @ 1.5	Temp Payment	Absence
101	Thomas, Ian	0.00	0.00	0.00	0.00	0.00	0.00	0.00
102	Smith, Katie	0.00	0.00	0.00	0.00	0.00	0.00	0.00
103	Mitchell, John	0.00	0.00	0.00	0.00	0.00	0.00	0.00
104	Crenshaw, Pat	0.00	0.00	0.00	0.00	0.00	0.00	0.00
105	Fowler, Robert	0.00	0.00	0.00	0.00	0.00	0.00	0.00
106	Jenkins, Pauline	0.00	0.00	0.00	0.00	0.00	0.00	0.00
107	Jones, Patrick	0.00	0.00	0.00	0.00	0.00	0.00	0.00
108	Phillips, Sonja	0.00	0.00	0.00	0.00	0.00	0.00	0.00
109	Evans, Dorothy	0.00	0.00	0.00	0.00	0.00	0.00	0.00
110	Powell, Grant	0.00	0.00	0.00	0.00	0.00	0.00	0.00
112	Smith, Ryan	0.00	0.00	0.00	0.00	0.00	0.00	0.00
113	Hobbs, Gareth	0.00	0.00	0.00	0.00	0.00	0.00	0.00
114	Slater, Emma	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Print Comment


[Change View](#) [Update](#) [Save](#) [Cancel](#)

**Torexretail**


### Report window

3. You are able to type the hours staff have worked, directly into the relevant field.

## More Info Icon

1. Clicking  icon, to the right hand side of the screen, will display a screen showing a summary of payment information, split by day.
2. Click **Back** to return to the main screen.

## Comments

1. Typing text in the **Comment** box will apply it to that weeks data.
2. Clicking  icon, next to a person's name and pay rate, will display a window, similar to that below:

**Explorer User Prompt**

Script Prompt:  
Please enter a comment

[OK](#) [Cancel](#)

### Comment window

- 
3. Enter a comment and click on **OK** to save and return to the previous screen or **Cancel** to disregard any changes.

### **Change View**

1. Clicking **Change View** will display the **OTP Detail** screen.

### **Update**

1. Clicking **Update** will refresh the screen, with any changes made.

### **Save**

1. Clicking **Save** will send the data to the system and close the screen down.

### **Commit**

1. Clicking **Commit** will send the data to your 3<sup>rd</sup> party payroll system and close down the screen.
2. When re-entering the screen, the button will change to **Re-commit**. Clicking this will apply any changes made and re-submit the information to your 3<sup>rd</sup> party payroll system.

### **Cancel**

1. Clicking **Cancel** will disregard any changes which have been made.

### **Edit Chargeouts**

1. To add or edit any chargeouts, click  icon, next to the relevant person and pay rate.
2. A screen, similar to that below, will be displayed:




Day	Value	Store	Dept	Comment
Monday	<input type="text"/>	select	select	<input type="text"/>

OK

Cancel

### Report window

3. Select the applicable **Day**.
4. Type in the **value**.
5. Select the **Store**.
6. Select the Department.
7. Enter any appropriate Comments.
8. If you have more than 1 Chargeout to add, click . Otherwise, click on OK to confirm the information or Cancel to disregard.

### Navigating the screen

1. To move from one week to another, click **< Previous** and **Next >**.
2. Clicking **This Week** will always display the current week.

### Print

1. Clicking **Print**, will open a standard print dialog box.
2. Select the relevant printer and click **OK**.
3. The report will be printed.

## OTP Detail



1. To view the OTP details, click
2. A screen, similar to that below, will be displayed:

**Torexretail** Administrator Week 3 : 15 January 2007 Log off

< Previous This week Next >

Payroll No.	Name	Type	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Total
101	Thomas, Ian	Basic Rate <input type="button" value="Select"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	0.00
102	Smith, Katie	Basic Rate <input type="button" value="Select"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	0.00
103	Mitchell, John	Basic Rate <input type="button" value="Select"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	0.00
104	Crenshaw, Pat	Basic Rate <input type="button" value="Select"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	0.00
105	Fowler, Robert	Basic Rate <input type="button" value="Select"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	0.00
106	Jenkins, Pauline	Basic Rate <input type="button" value="Select"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	0.00
107	Jones, Patrick	Basic Rate <input type="button" value="Select"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	0.00
108	Phillips, Sonja	Basic Rate <input type="button" value="Select"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	0.00
109	Evans, Dorothy	Basic Rate <input type="button" value="Select"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	0.00

Print Comment

**Torexretail**

### Report window

3. You are able to type the hours staff have worked, directly into the relevant field.
4. To choose a different pay band, click **Select**.
5. A window will be displayed, with your different pay band.



1229 : Birmingham -- Web Page ...

### Select band


Wage Type

☐ Bank Hol @ 1.5  
☐ Night Rate @ 1.5  
☐ Night Rate @ 1/3rd  
☐ Overtime x 1.5  
☐ Temp Payment


### Select Band window

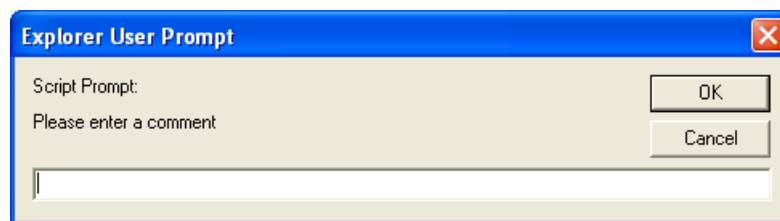
6. Tick the relevant pay band and click **OK** to save your choice and return to the previous screen or **Cancel** to disregard.
7. Enter the applicable value, under the appropriate day.
8. If you have more than 1 pay band to add, click . Another line will be displayed.
9. If you have added a pay band by mistakes, click  to remove it.

## More Info Icon

1. Clicking  icon, to the right hand side of the screen, will display a screen showing a summary of payment information, split by day.
2. Click **Back** to return to the main screen.

## Comments

1. Typing text in the **Comment** box will apply it to that weeks data.
2. Clicking  icon, next to a person's name, will display a window, similar to that below:



**Comment window**

3. Enter a comment and click on **OK** to save and return to the previous screen or **Cancel** to disregard.

## Change View

1. Clicking **Change View** will display the **OTP Summary** screen.

## Update

1. Clicking **Update** will refresh the screen, with any changes made.

## Save

1. Clicking **Save** will send the data to the system and close the screen down.

## Commit

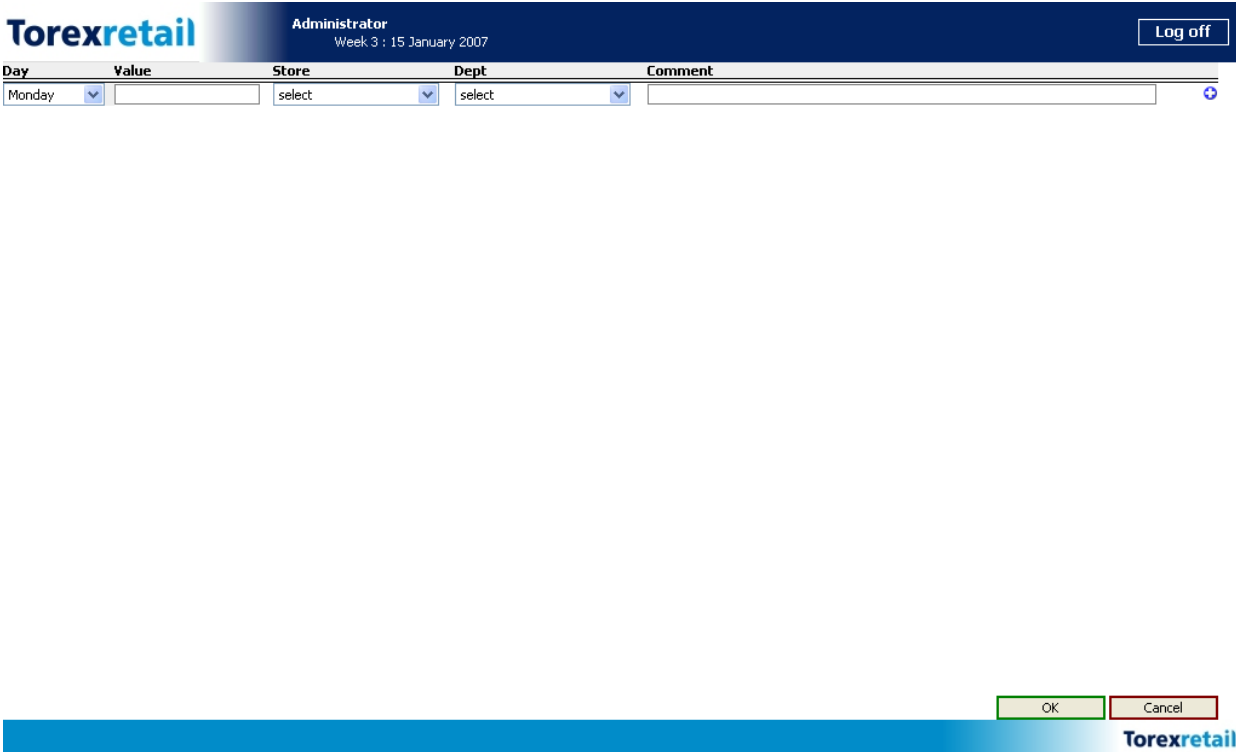
1. Clicking **Commit** will send the data to your 3<sup>rd</sup> party payroll system and close down the screen.
2. When re-entering the screen, the button will change to **Re-commit**. Clicking this will apply any changes made and re-submit the information to your 3<sup>rd</sup> party payroll system.

## Cancel

1. Clicking **Cancel** will disregard any changes which have been made.


## Edit Chargeouts

1. To add or edit any chargeouts, click  icon, next to the relevant person and pay rate.
2. A screen, similar to that below, will be displayed:



The screenshot shows the Torexretail Administrator interface. At the top, there is a header bar with the Torexretail logo on the left, the text "Administrator" and "Week 3 : 15 January 2007" in the center, and a "Log off" button on the right. Below the header is a form with five columns: "Day", "Value", "Store", "Dept", and "Comment". The "Day" column has a dropdown menu with "Monday" selected. The "Value" column has a text input field. The "Store" column has a dropdown menu with "select" selected. The "Dept" column has a dropdown menu with "select" selected. The "Comment" column has a text input field. At the bottom right of the form, there are two buttons: "OK" (green) and "Cancel" (red). The Torexretail logo is also visible in the bottom right corner of the interface.

### Edit Chargeouts window

3. Select the applicable **Day**.
4. Type in the **value**.
5. Select the **Store**.
6. Select the **Department**.
7. Enter any appropriate Comments.
8. If you have more than 1 Chargeout to add, click . Otherwise, click on OK to confirm the information or Cancel to disregard.

## Navigating the screen

1. To move from one week to another, click **< Previous** and **Next >**.
2. Clicking **This Week** will always display the current week.

## Print

1. Clicking **Print**, will open a standard print dialog box.
2. Select the relevant printer and click **OK**.
3. The report will be printed.

## OTP Admin



1. To view the OTP Admin screen, click
2. A screen, similar to that below, will be displayed:

**Torexretail** Administrator Week 1 : 02 January 2006 OTP Admin [Home](#) [Log off](#)

#	Status	User	Date	Comment	Delete ?
1	Committed	Administrator	17/01/07 12:24	** no comment **	<input type="checkbox"/>
2	Saved	Administrator	17/01/07 12:32	** no comment **	<input type="checkbox"/>

Delete

Torexretail

### OTP Admin window

3. This screen shows any changes which have been made to the OTP section of the system and allows you to undo any changes.
4. Click in the **Delete?** tick box, next to the relevant option you want to undo
5. Click **Delete**.

**Note:** You are not asked for confirmation when you click **Delete**. Make sure that you are certain about the changes you want to delete, before clicking **Delete**.



# Enterprise Messages



## Enterprise Messages

Create and send messages to stores.

1. To send messages to another store, click
2. A screen, similar to that below will be displayed:

**Torexretail** Administrator Week 6 : 05 February 2007 Messages Home Log off

<input type="checkbox"/>	From	Subject	Added	Due
<input type="checkbox"/>	Administrator	New Promotions Available	07/02/07	
<input type="checkbox"/>	Administrator	Meeting on Tuesday	05/02/07	

New... Delete Recall Filter...

**Torexretail**

Administrator window

## Create a New Message

1. To create a new message, click **New....**
2. A screen, similar to that below, will be displayed:

**Compose Message**

Subject:

From: Administrator

Due Date:  ... Effective Date: 06/02/2007 ... Expires On:  ...

Access Level: User Importance: High

**Message Detail**

**Stores List**

- ☐ Enterprise
  - ☐ Region 1
    - ☐ 1229 : Birmingham
    - ☐ 1002 : Coventry
    - ☐ 1010 : Stratford

Send Save as draft Delete Recall Cancel

### Compose Message window

3. Enter the **Subject** of the message.
4. Enter the **From** name, if applicable.
5. If required, enter a **Due Date**, **Effective Date** or **Expires On** date. These dates are for reference only.
6. Select the **Access Level** of the users who the message is intended for.
7. Change the **Importance** of the message, if required.
8. Type the message in the **Message Detail** box.
9. Select the store(s) that this message is intended for, from the **Store List**.
10. When ready click **Send** to send the message immediately or **Save as Draft**, to save the message for further editing at a later time.

## Update a Message

1. To send an update to a previously sent message, click previous message in the main list.
2. Click **Compose Update**. This will open a new message, which duplicates the information from the previous message.
3. Type in the updated message and click **Save** to initiate the update.

## Delete a Message

1. To delete a message, click in the tick box, to the left of the applicable message.
2. Click **Delete** at the bottom of the screen.
3. You will be asked **Are you sure you want to delete the selected message(s)?** Click **OK** to confirm or **Cancel** to disregard.



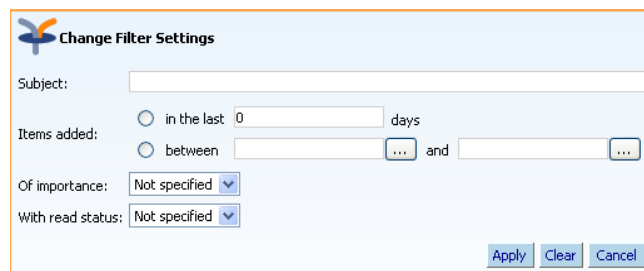
## Recall a Message

1. To mark a message as recalled, click in the tick box, next to the relevant message and click **Recall**.
2. You will be asked **Are you sure you want to recall the selected message(s)?** Click **OK** to confirm or **Cancel** to disregard.

## Filter Messages


The Filter allows you to reduce the number of messages displayed, making it easier to find a specific one.

1. To do this, click **Filter** at the bottom of the screen.
2. A window, similar to the one below, will be displayed:



### Change Filter Settings window

3. The components of the screen are described below:

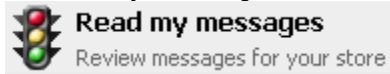
Subject		The Subject field can be used to find specific strings of text within the subjects of the messages for example, If I wanted to find a message with the subject Meeting to discuss Store Performance and I entered Store Performance, then this message would be displayed in the filtered list. If I had entered Store Performance Meeting, then the message would not have been included as those words do not appearing the correct order. Note that the Subject is not case sensitive.
Items Added		Entering a number or date in the relevant field will only display messages within the specified time frame.
	In the last n days	Entering a figure in this field, will only display messages added (received) within the specified number of days for example, Entering 10, would only display messages received within the past 10 days.
	Between n and n	This field requires 2 dates to be entered. The date can either be typed directly, in the format dd/mm/yyyy, or you can click  and click relevant date. Selecting this method will only display messages which were added (received) within the specified time frame for example, If the following was entered Between 01/12/2006 and 31/12/2006, then only messages received during this month, would be displayed.
Of Importance		There are 3 options which can be selected from the drop down menu - High, Low or Normal. Selecting one of these options will only display messages with the appropriate importance level.
With Read Status		There are 2 options which can be selected from the drop down menu - Unread or Read.

4. Any, or a combination, of the options above can be selected.
5. When ready, click **Apply**.

6. You will be returned to the main message screen and only messages which match the filter criteria you have set, will be displayed.
7. To adjust the list further, click **Filter**.
8. To undo the filter and display the full list of messages, click **Clear Filter**.

## Read my Messages

1. To read any new or previous messages, which have been sent to you, click



2. A list of received, read and unread, messages will be displayed.

### Messages window

3. Each message can have a series of icons to the left of the sender's name. An explanation of each icon is below:

	<b>Recall</b> Indicates that this message has been recalled.
	<b>High Importance</b> Shows that the message has been sent with a High Importance.
	<b>Normal Status</b> This icon indicates it is a standard message.
	<b>Low Importance</b> Shows that the message has been sent with a low importance.

4. When a message is unread, it will be displayed on the screen, with the text of the message listed below it and the summary information in bold (as can be seen in the screen above).

5. When a message is read, the text will be hidden and the summary information will no longer be displayed in bold (as can be seen in the screen below).
6. The message can be re-read by clicking subject. This acts a link to the whole message.

The screenshot shows the Torexretail Messages window. At the top, there is a header bar with the Torexretail logo, the user role 'ADMINISTRATOR', the date 'Week 32 : 03 December 2006', and buttons for 'Messages', 'Home', and 'Log off'. Below the header is a table with columns: From, Subject, Added, and Due. The table contains three rows of messages. Below the table is a large empty box for the message content. At the bottom of the table area are buttons for 'Delete', 'Mark as Read', 'Mark as Unread', and 'Filter...'. A footer bar contains the text 'If you need assistance, please contact the Service Desk on 01438 848080' and the Torexretail logo.

From	Subject	Added	Due
Head Office	Christmas Special Offers	06/12/06	
Head Office	Weekly Report	06/12/06	
Cheltenham Manager	Meeting on 19th December	06/12/06	

Buttons: Delete, Mark as Read, Mark as Unread, Filter...

Footer: If you need assistance, please contact the Service Desk on 01438 848080

#### Messages window

## Reading Messages

1. To read a received message, click **Subject** of the relevant message. This acts as a link to display the whole message.
2. The message will be displayed and will appear similar to the screen below:

**Messages window**

1	If any updates have been made to this sent message, the date these changes occurred is noted here.
2	If the message has been set to expire (be removed from your message list) on a certain date, it will be displayed here. It can also show if a message has been recalled.
3	If a message has been set with a High or Low importance, the status will be displayed here.
4	The subject of the message is displayed here.
5	The sender of the message will be displayed here.
6	Any due date, set by the sender, will be displayed here.
7	The date that the message was added (sent), will be displayed here.
8	The actually contents of the message will be displayed here.

## Deleting Messages

There are 2 ways to delete a message from the system:

- Main Screen
- Reading the Message

### Main Screen

#### Deleting a Single Message

1. To delete a single message from the system, click in the tick box, to the left of the message. The message will become highlighted.
2. Click **Delete**, at the bottom of the screen.

- 
3. You will be asked **Are you sure you want to delete the selected message(s)?** Click on **OK** to confirm the deletion or **Cancel**.

### **Deleting Multiple Messages**

1. To delete multiple messages from the system, click in the tick box, to the left of each message. The relevant messages will become highlighted.
2. Click **Delete**, at the bottom of the screen.
3. You will be asked **Are you sure you want to delete the selected message(s)?** Click on **OK** to confirm the deletion or **Cancel**.

### **Deleting All Messages**

1. To delete all messages from the system, click in the tick box at the top of the screen. This will highlight all of the messages.
2. Click **Delete**, at the bottom of the screen.
3. You will be asked **Are you sure you want to delete the selected message(s)?** Click on **OK** to confirm the deletion or **Cancel**.

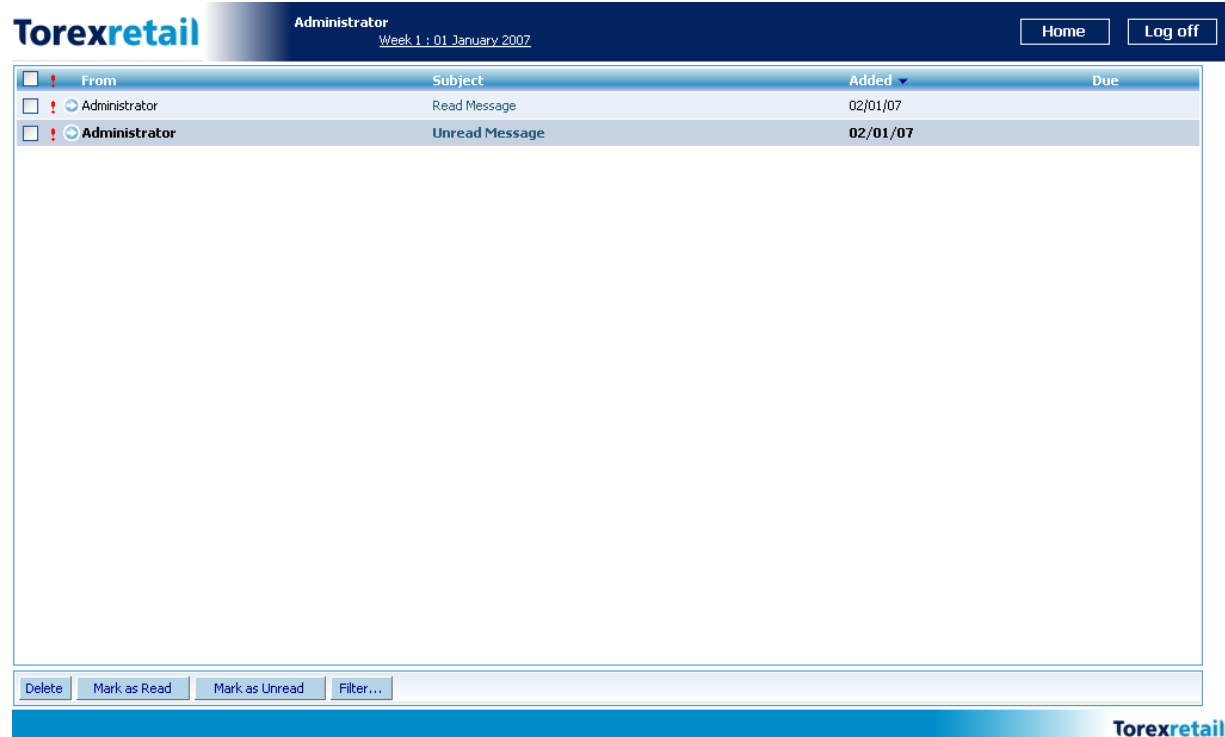
## **Reading the Message**

1. When reading a message, click **Delete** at the bottom of the screen.
2. You will be asked **Are you sure you want to delete the selected message(s)?** Click on **OK** to confirm the deletion or **Cancel**.
3. You will be returned to the main list of received messages.

## **Mark as Read**

Messages which are unread are displayed in Bold. This enables them to be distinguishable from read messages. It is possible to change a messages status to read, even though it may not have been.

The screen below shows the difference between a read and an unread message:



### Messages window

#### Marking a Single Message as Read

1. To mark a single message as read, click in the tick box, to the left of the message. The message will become highlighted.
2. Click **Mark as Read**, at the bottom of the screen.
3. The message will then appear as a read message, in the list.

#### Marking Multiple Messages as Read

1. To mark multiple messages as read, click in the tick box, to the left of each message. The relevant messages will become highlighted.
2. Click **Mark as Read**, at the bottom of the screen.
3. The messages will then appear as read, in the list.

#### Marking All Messages as Read

1. To mark all messages as read, click in the tick box at the top of the screen. This will highlight all of the messages.
2. Click **Mark as Read**, at the bottom of the screen.
3. All of the messages will then appear as read, in the list.

### Reading the Message

1. When reading a message, the system will automatically mark the message as read, when you return to the main list of messages.

## Mark as Unread

Messages which are unread are displayed in Bold. This enables them to be distinguishable from read messages. It is possible to change a messages status to Unread, even though it may have been.

The screen below shows the difference between a read and an unread message:

From	Subject	Added	Due
Administrator	Read Message	02/01/07	
Administrator	Unread Message	02/01/07	

### Messages window

#### Marking a Single Message as Unread

1. To mark a single message as unread, click in the tick box, to the left of the message. The message will become highlighted.
2. Click **Mark as Unread**, at the bottom of the screen.
3. The message will then appear as an Unread message, in the list.

#### Marking Multiple Messages as Unread

1. To mark multiple messages as Unread, click in the tick box, to the left of each message. The relevant messages will become highlighted.
2. Click **Mark as Unread**, at the bottom of the screen.
3. The messages will then appear as Unread, in the list.

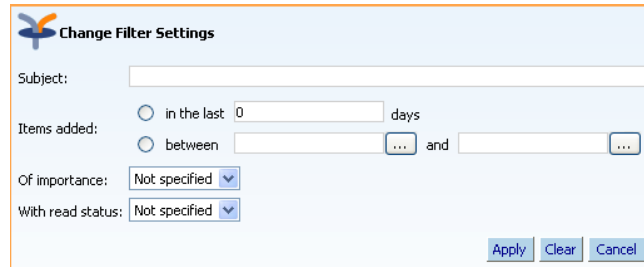
#### Marking All Messages as Unread

1. To mark all messages as Unread, click in the tick box at the top of the screen. This will highlight all of the messages.
2. Click **Mark as Unread**, at the bottom of the screen.
3. All of the messages will then appear as Unread, in the list.

## Filter


The Filter allows you to reduce the number of messages displayed, making it easier to find a specific one.

1. To do this, click **Filter** at the bottom of the screen.
2. A window, similar to the one below, will be displayed:



### Change Filter Settings window

3. The components of the screen are described below:

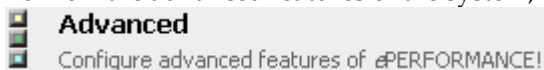
Subject		The Subject field can be used to find specific strings of text within the subjects of the messages for example, If I wanted to find a message with the subject Meeting to discuss Store Performance and I entered Store Performance, then this message would be displayed in the filtered list. If I had entered Store Performance Meeting, then the message would not have been included as those words do not appearing the correct order. Note that the Subject is not case sensitive.
Items Added		Entering a number or date in the relevant field will only display messages within the specified time frame.
	In the last n days	Entering a figure in this field, will only display messages added (received) within the specified number of days for example, Entering 10, would only display messages received within the past 10 days.
	Between n and n	This field requires 2 dates to be entered. The date can either be typed directly, in the format dd/mm/yyyy, or you can click  and click relevant date. Selecting this method will only display messages which were added (received) within the specified time frame for example, If the following was entered Between 01/12/2006 and 31/12/2006, then only messages received during this month, would be displayed.
Of Importance		There are 3 options which can be selected from the drop down menu - High, Low or Normal. Selecting one of these options will only display messages with the appropriate importance level.
With Read Status		There are 2 options which can be selected from the drop down menu - Unread or Read.

4. Any, or a combination, of the options above can be selected.
5. When ready, click **Apply**.
6. You will be returned to the main message screen and only messages which match the filter criteria you have set, will be displayed.
7. To adjust the list further, click **Filter**.
8. To undo the filter and display the full list of messages, click **Clear Filter**.



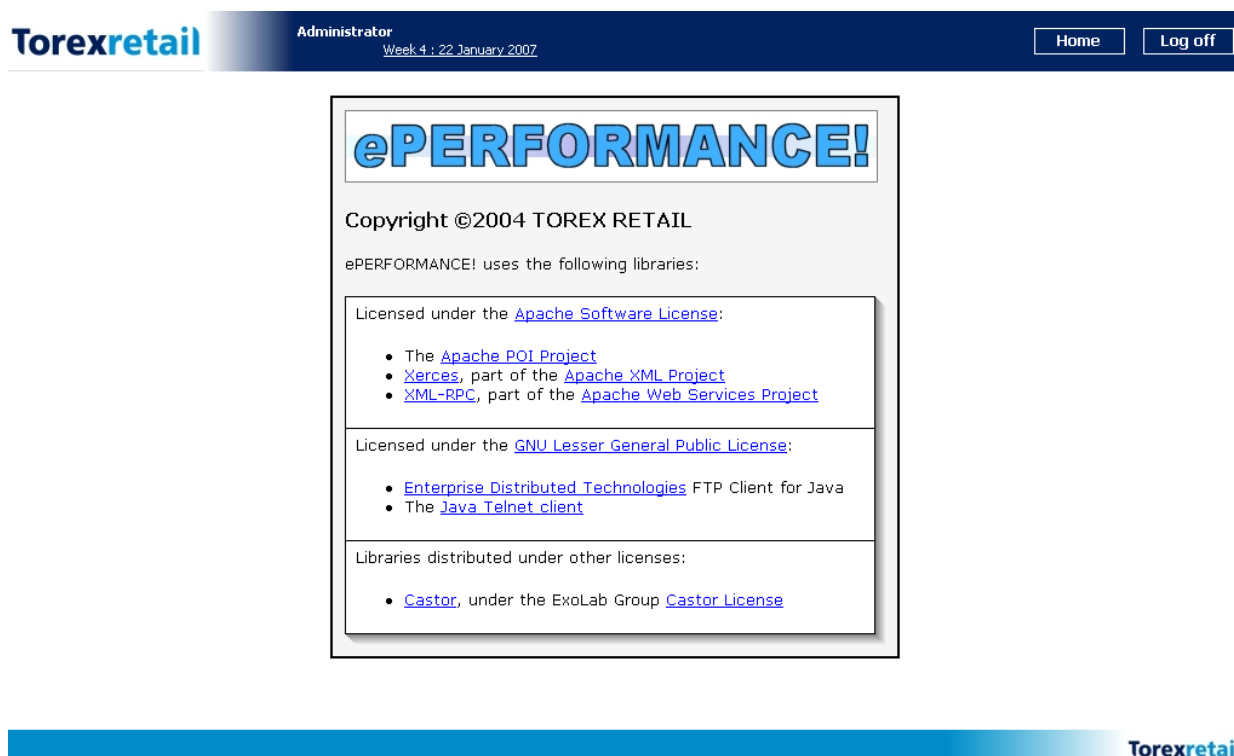
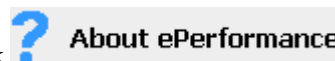
## Advanced

1. To view the advanced features of the system, click



### About ePerformance

1. To view licensing information for the system, click
2. A screen, similar to that below, will be displayed:



#### About window

3. Click links to view the relevant information.

### Table Editors

1. To view the table editors, click



### Global Descriptions

1. To view the global descriptions, click
2. A screen, similar to that below, will be displayed:



## Select item

Group	Section
DESC	ACTION PROCESSES
DESC	ACTION RULE APPLIES
DESC	ACTION RULES
DESC	ACTION TYPE ACTIONS
DESC	ACTION TYPES
DESC	ADDRESS TYPES
DESC	AGE CODE
DESC	ANALYSIS TYPES
DESC	AVAILABILITY NAMES
DESC	BANK HOLIDAY TYPE
DESC	BREAK PATTERNS
DESC	BREAK TYPES
DESC	CONTRACTS
DESC	COSTBANDS
DESC	CUSTOMARY HOLIDAY TYPE
DESC	DATE FILTER OPTIONS
DESC	DAY NAMES
DESC	DELIVERY STATUS
DESC	EMPLOYEE RECYCLED
DESC	EMPLOYEE TYPES
ACT-EMP ETH-REC REG-UNI	
Edit New Delete	

## Select Item window

## Add a New Global Description

1. To add a new global description, click **New**.
2. Enter the relevant information and click **OK** to save and confirm or **Cancel** to disregard.

## Add an Item

1. To add an item to a global description, click description in the list.
2. Click **Edit**.
3. Click **New**.
4. Enter the appropriate information and click **OK** to save and confirm or **Cancel** to disregard.

## Edit a Global Description

1. To edit a global description, click on its name in the list and click **Edit**.
2. Edit or add any relevant information and click **OK** to save and confirm or **Cancel** to disregard.

## Delete an Item


1. To delete an item, tick the **Delete?** tick box.
2. Click **OK**.
3. You will be asked **Are you sure you want to delete the selected items?** Click on **OK** to confirm or **Cancel** to disregard.


## Delete a Global Description

1. To delete a global description, click on its name in the list and click **Delete**.

2. You will be asked **Are you sure you want to delete this item?** Click on **Yes** to confirm or **No** to disregard.

## Global Table Editor (CODES)

1. To view the global table editor screen, click  **Global Table Editor (CODES)**.
2. A screen, similar to that below, will be displayed:



**Select item**

Group	Section ↑
CODES	ACTION TYPE
CODES	BREAK TYPES
CODES	COMMODITY GROUPS
CODES	LEVELS
CODES	REGIONS

ACT-REG

Edit New Delete

### Select Item window

#### Add a New Global Table

1. To add a new global table, click **New**.
2. Enter the relevant information and click **OK** to save and confirm or **Cancel** to disregard.

#### Add an Item

1. To add an item to a global description, click description in the list.
2. Click **Edit**.
3. Click **New**.
4. Enter the appropriate information and click **OK** to save and confirm or **Cancel** to disregard.

#### Edit a Global Table

1. To edit a global table, click on its name in the list and click **Edit**.
2. Edit or add any relevant information and click **OK** to save and confirm or **Cancel** to disregard.


### Delete an Item

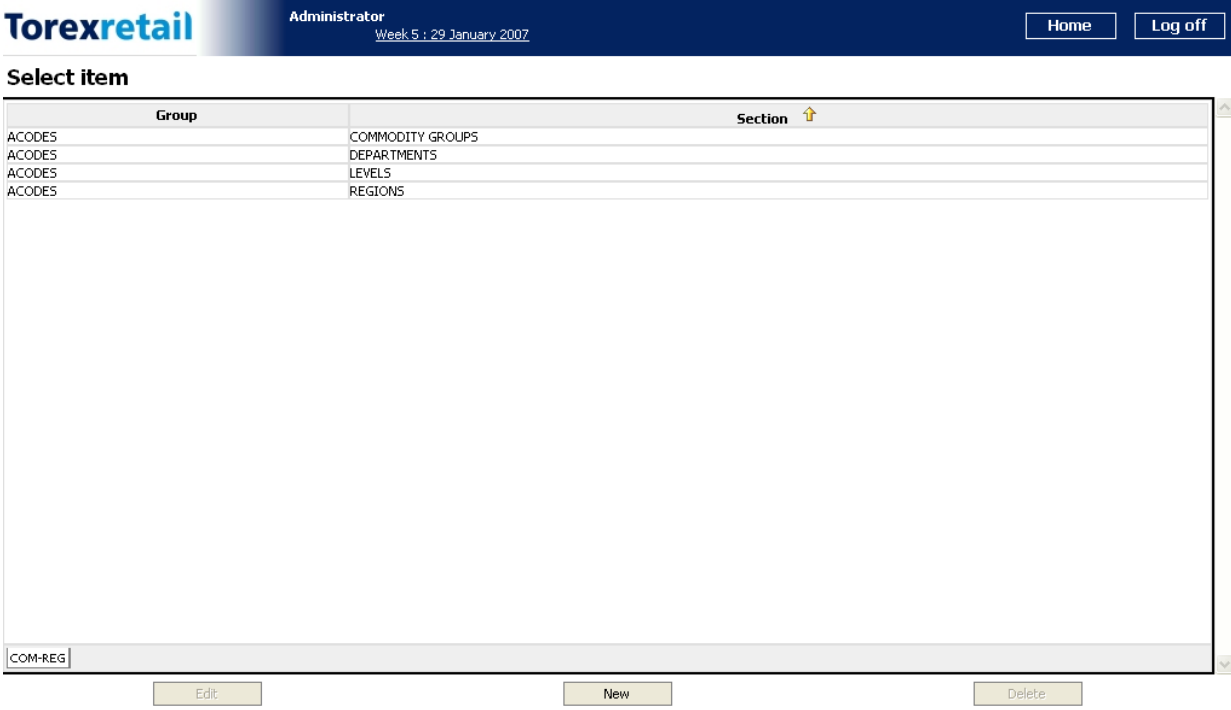
1. To delete an item, tick the **Delete?** tick box.
2. Click **OK**.
3. You will be asked **Are you sure you want to delete the selected items?** Click on **OK** to confirm or **Cancel** to disregard.

### Delete a Global Description

1. To delete a global table, click on its name in the list and click **Delete**.
2. You will be asked **Are you sure you want to delete this item?** Click on **Yes** to confirm or **No** to disregard.

## Global Table Editor (ACODES)

1. To view the global table editor screen, click  **Global Table Editor (ACODES)**.
2. A screen, similar to that below will be displayed:



**Torexretail** Administrator Week 5 : 29 January 2007 Home Log off

Select item

Group	Section ↑
ACODES	COMMODITY GROUPS
ACODES	DEPARTMENTS
ACODES	LEVELS
ACODES	REGIONS

COM-REG

Edit New Delete

**Torexretail**

### Select Item window

### Add a New Global Table

1. To add a new global table, click **New**.
2. Enter the relevant information and click **OK** to save and confirm or **Cancel** to disregard.

### Add an Item

1. To add an item to a global table, click description in the list.
2. Click **Edit**.
3. Click **New**.

4. Enter the appropriate information and click **OK** to save and confirm or **Cancel** to disregard.

### Edit a Global Table

1. To edit a global table, click on its name in the list and click **Edit**.
2. Edit or add any relevant information and click **OK** to save and confirm or **Cancel** to disregard.


### Delete an Item


1. To delete an item, tick the **Delete?** tick box.
2. Click **OK**.
3. You will be asked **Are you sure you want to delete the selected items?** Click on **OK** to confirm or **Cancel** to disregard.

### Delete a Global Table

1. To delete a global table, click on its name in the list and click **Delete**.
2. You will be asked **Are you sure you want to delete this item?** Click on **Yes** to confirm or **No** to disregard.

## Fileset Descriptions

1. To view the fileset descriptions, click  **Fileset descriptions**.
2. A screen, similar to that below, will be displayed:



**Torexretail** Administrator Week 5 : 29 January 2007 Fileset descriptions Home Log off

Select item

There are no items on this page

Edit New Delete

**Torexretail**

Select Item window

---

### Add a New Fileset Description

1. To add a new fileset description, click **New**.
2. Enter the relevant information and click **OK** to save and confirm or **Cancel** to disregard.

### Add an Item

1. To add an item to a fileset description, click description in the list.
2. Click **Edit**.
3. Click **New**.
4. Enter the appropriate information and click **OK** to save and confirm or **Cancel** to disregard.

### Edit a Fileset Description

1. To edit a fileset description, click on its name in the list and click **Edit**.
2. Edit or add any relevant information and click **OK** to save and confirm or **Cancel** to disregard.

### Delete an Item

1. To delete an item, tick the **Delete?** tick box.
2. Click **OK**.
3. You will be asked **Are you sure you want to delete the selected items?** Click **OK** to confirm or **Cancel** to disregard.

### Delete a Fileset Description


1. To delete a fileset description, click on its name in the list and click **Delete**.
2. You will be asked **Are you sure you want to delete this item?** Click on **Yes** to confirm or **No** to disregard.

## Fileset Codes



### Fileset codes

Fileset specific configuration codes

1. To view the fileset codes, click  Fileset specific configuration codes.
2. A screen, similar to that below, will be displayed:

## Select item

There are no items on this page

Edit New Delete

## Select Item window

**Add a New Fileset Code**

1. To add a new fileset code, click **New**.
2. Enter the relevant information and click **OK** to save and confirm or **Cancel** to disregard.

**Add an Item**

1. To add an item to a fileset code, click description in the list.
2. Click **Edit**.
3. Click **New**.
4. Enter the appropriate information and click **OK** to save and confirm or **Cancel** to disregard.

**Edit a Fileset Code**

1. To edit a fileset code, click on its name in the list and click **Edit**.
2. Edit or add any relevant information and click **OK** to save and confirm or **Cancel** to disregard.

**Delete an Item**


1. To delete an item, tick the **Delete?** tick box.
2. Click **OK**.
3. You will be asked **Are you sure you want to delete the selected items?** Click on **OK** to confirm or **Cancel** to disregard.

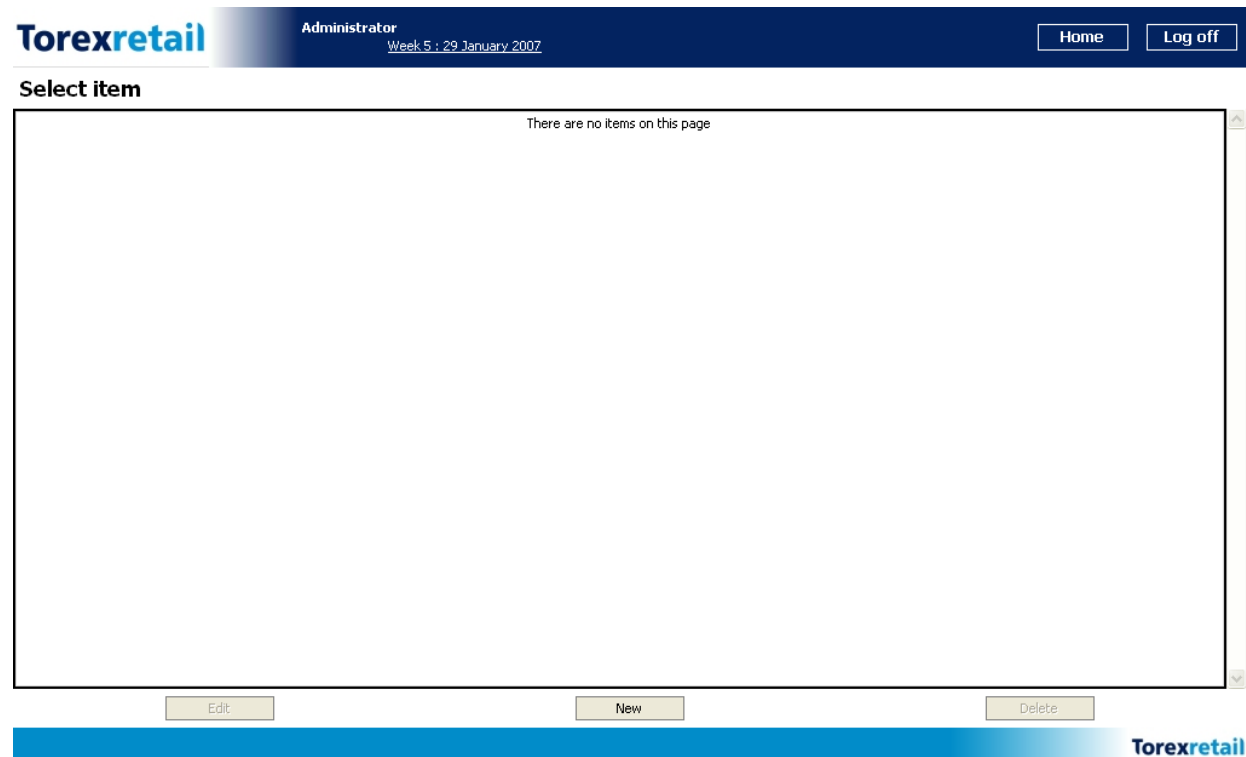
**Delete a Fileset Code**

1. To delete a fileset code, click on its name in the list and click **Delete**.

2. You will be asked **Are you sure you want to delete this item?** Click on **Yes** to confirm or **No** to disregard.

## Group Descriptions

1. To view the group descriptions, click  **Group descriptions**.
2. A screen, similar to that below, will be displayed:



### Select Item window

#### Add a New Group Description

1. To add a new group description, click **New**.
2. Enter the relevant information and click **OK** to save and confirm or **Cancel** to disregard.

#### Add an Item

1. To add an item to a group description, click description in the list.
2. Click **Edit**.
3. Click **New**.
4. Enter the appropriate information and click **OK** to save and confirm or **Cancel** to disregard.

#### Edit a Group Description

1. To edit a group description, click on its name in the list and click **Edit**.
2. Edit or add any relevant information and click **OK** to save and confirm or **Cancel** to disregard.



### Delete an Item

1. To delete an item, tick the **Delete?** tick box.
2. Click **OK**.
3. You will be asked **Are you sure you want to delete the selected items?** Click on **OK** to confirm or **Cancel** to disregard.

### Delete a Group Description

1. To delete a group description, click on its name in the list and click **Delete**.
2. You will be asked **Are you sure you want to delete this item?** Click on **Yes** to confirm or **No** to disregard.

## Global Forecast Descriptions

1. To view the global forecast description screen, click



**Global Forecast Descriptions**

2. A screen, similar to that below, will be displayed:

**Torexretail** Administrator Week 5 : 29 January 2007 Home Log off

Select item

Group	Section
FCSDESC	COMMODITY GROUPS
FCSDESC	DRIVERS
FCSDESC	MODELS
FCSDESC	OPERATING WINDOWS
FCSDESC	PATTERNS
FCSDESC	PROFILES
FCSDESC	RULE FOCUS
FCSDESC	RULE ORDER
FCSDESC	RULE TYPES
FCSDESC	RULES
FCSDESC	STORE GROUPS
FCSDESC	TEMPLATE WORKLOADS
FCSDESC	WINDOW OFFSET TYPES
FCSDESC	WORKLOAD RESOLUTION

COM-WOR

Edit New Delete

**Torexretail**

### Select Item window

### Add a New Global Forecast Description

1. To add a new global forecast description, click **New**.
2. Enter the relevant information and click **OK** to save and confirm or **Cancel** to disregard.

### Add an Item

1. To add an item to a global forecast description, click description in the list.
2. Click **Edit**.

3. Click **New**.
4. Enter the appropriate information and click **OK** to save and confirm or **Cancel** to disregard.

### Edit a Global Forecast Description

1. To edit a global forecast description, click on its name in the list and click **Edit**.
2. Edit or add any relevant information and click **OK** to save and confirm or **Cancel** to disregard.


### Delete an Item

1. To delete an item, tick the **Delete?** tick box.
2. Click **OK**.
3. You will be asked **Are you sure you want to delete the selected items?** Click on **OK** to confirm or **Cancel** to disregard.

### Delete a Global Forecast Description

1. To delete a global forecast description, click on its name in the list and click **Delete**.
2. You will be asked **Are you sure you want to delete this item?** Click on **Yes** to confirm or **No** to disregard.

## Forecaster Images

1. To view the forecaster images, click  **Forecaster Images**.
2. A screen, similar to that below, will be displayed:



The screenshot shows the 'Forecaster Images' window in the Torexretail application. The window has a dark blue header bar containing the Torexretail logo, the user role 'Administrator', the current date 'Week 5 : 29 January 2007', the title 'Forecaster Images', and 'Home' and 'Log off' buttons. Below the header, there is a 'Select item' section with a 'Find' input field and a 'Go' button. The main content area is a large white rectangle with the text 'There are no items on this page'. At the bottom of the window, there are three buttons: 'Edit', 'New', and 'Delete'.

Select Item window

### Add a New Forecaster Image

1. To add a new forecaster image, click **New**.
2. Enter the relevant information and click **OK** to save and confirm or **Cancel** to disregard.


### Edit a Forecaster Image

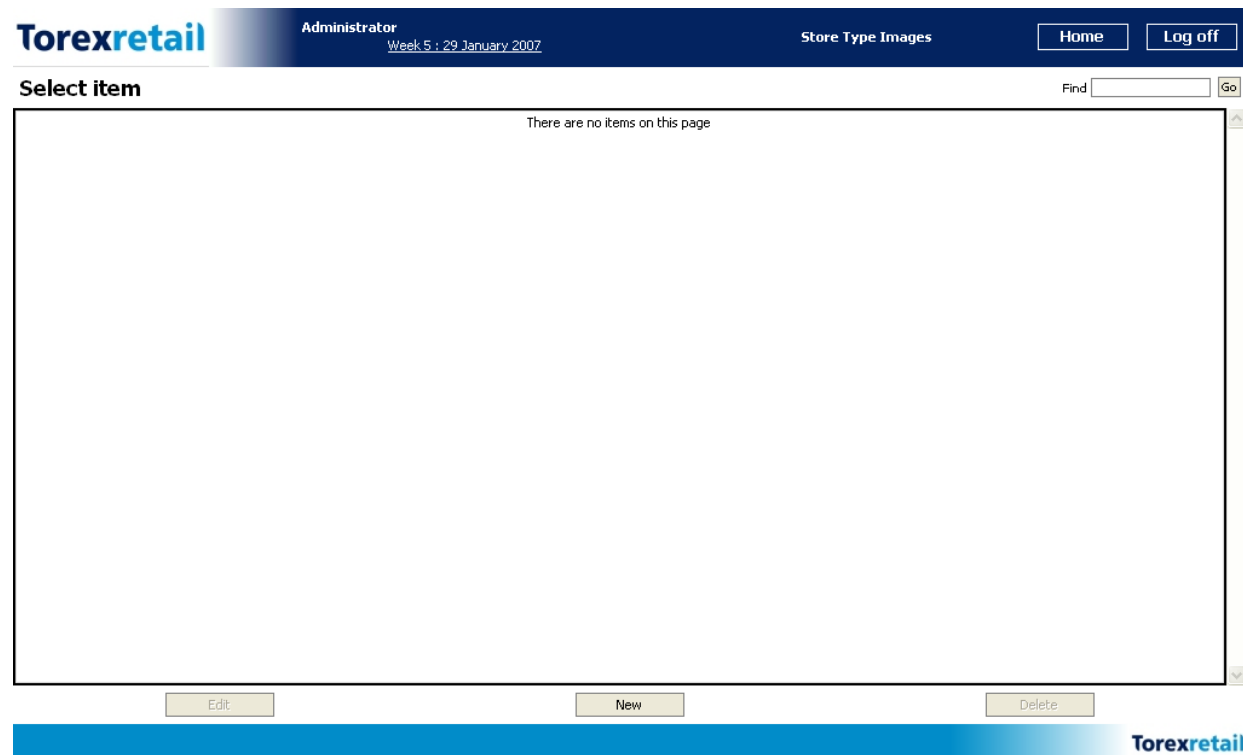
1. To edit a forecaster image, click on its name in the list and click **Edit**.
2. Edit or add any relevant information and click **OK** to save and confirm or **Cancel** to disregard.

### Delete a Forecaster Image

1. To delete a forecaster image, click on its name in the list and click **Delete**.
2. You will be asked **Are you sure you want to delete this item?** Click on **Yes** to confirm or **No** to disregard.

## Store Type Images

1. To view the store type images, click  **Store Type Images**.
2. A screen, similar to that below, will be displayed:



**Torexretail** Administrator Week 5 : 29 January 2007 Store Type Images Home Log off

Select item Find  Go

There are no items on this page

Edit New Delete

### Select Item window

### Add a New Store Type Image

1. To add a new store type image, click **New**.
2. Enter the relevant information and click **OK** to save and confirm or **Cancel** to disregard.

### Edit a Store Type Image

1. To edit a store type image, click on its name in the list and click **Edit**.
2. Edit or add any relevant information and click **OK** to save and confirm or **Cancel** to disregard.

### Delete a Store Type Image

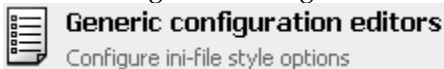
1. To delete a store type image, click on its name in the list and click **Delete**.
2. You will be asked **Are you sure you want to delete this item?** Click on **Yes** to confirm or **No** to disregard.

## Store Listing


1. To view the Store Listing, click  **Store Listing**.
2. Further information on this screen can be found on page 124.

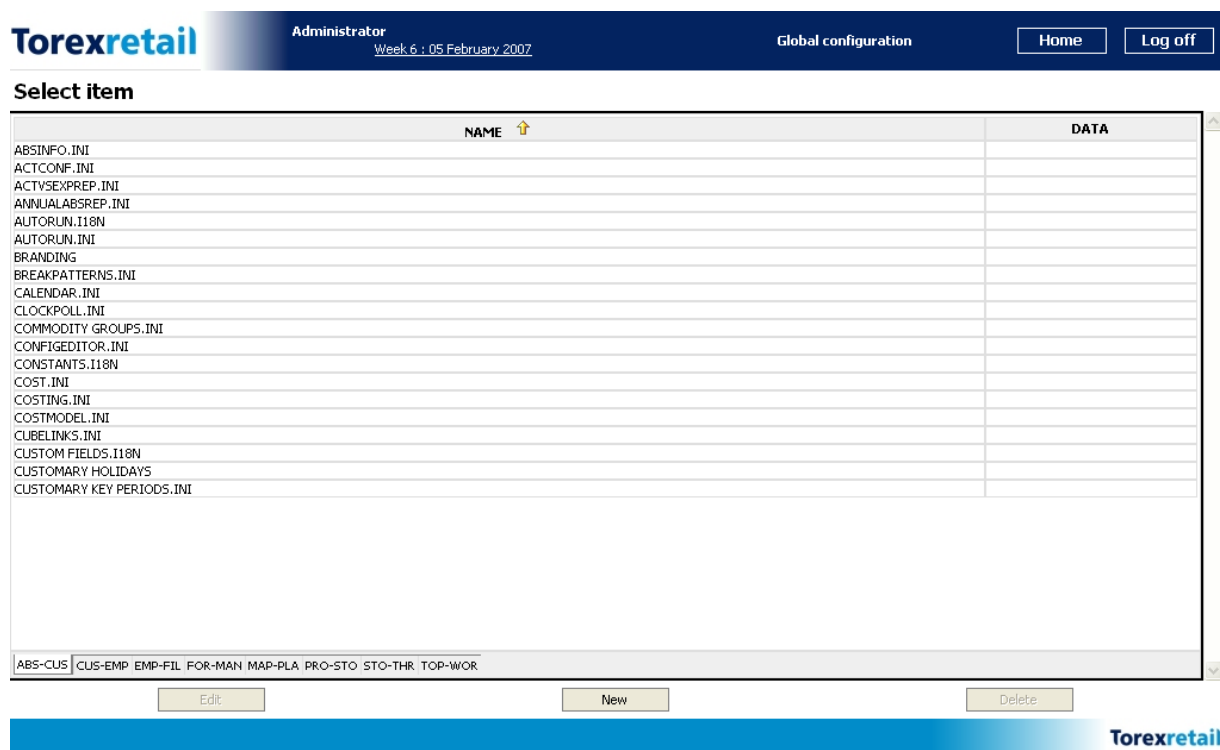
## Generic Configuration Editors

1. To view the generic configuration editors, click



## Global Configuration

1. To view the Global Configuration screen, click  **Global configuration**.
2. A screen, similar to that below, will be displayed:

The screenshot shows the "Global configuration" screen in the Torexretail application. The header bar includes the "Torexretail" logo, the user role "Administrator", the date "Week 6 : 05 February 2007", and navigation buttons for "Home" and "Log off". The main content area is titled "Select item" and contains a table with two columns: "NAME" and "DATA". The table lists various configuration files such as ABSINFO.INI, ACTCONF.INI, and CUSTOMARY KEY PERIODS.INI. At the bottom of the table, there is a search bar with the text "ABS-CUS" and a list of items: "CUS-EMP EMP-FIL FOR-MAN MAP-PLA PRO-STO STO-THR TOP-WOR". Below the table, there are three buttons: "Edit", "New", and "Delete". The Torexretail logo is also present in the bottom right corner of the page.

Select Item window

### Add a New Global Configuration File

1. To add a new global configuration file, click **New**.
2. Enter the name and the contents of the file.
3. Click **OK** to save and confirm or **Cancel** to disregard.


### Edit a Global Configuration File

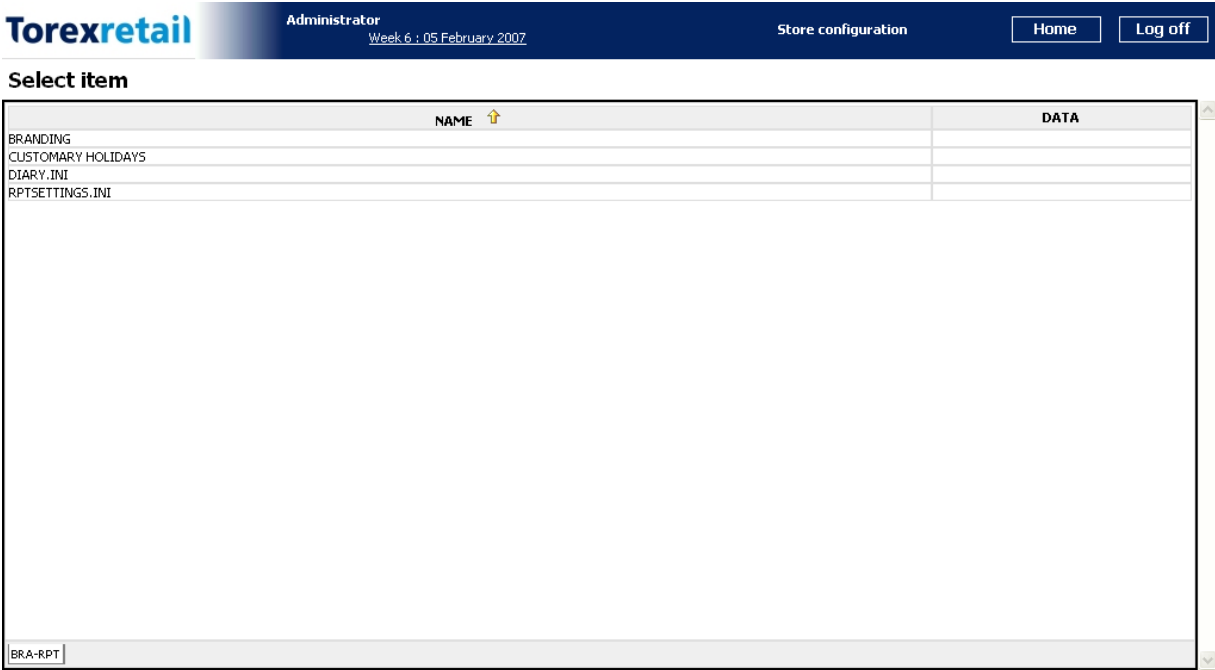
1. To edit a global configuration file, select the applicable file from the list and click **Edit**.
2. Make any relevant changes and click **OK** to confirm the changes or **Cancel** to disregard.

### Delete a Global Configuration File

1. To delete a global configuration file, select the applicable file from the list.
2. Click **Delete**.
3. You will be asked **Are you sure you want to delete this item?** Click **Yes** to confirm or **Cancel** to disregard.

## Store Configuration

1. To view the Store Configuration screen, click  **Store configuration**.
2. A screen, similar to that below, will be displayed:



**Torexretail** Administrator Week 6 : 05 February 2007 Store configuration Home Log off

Select item

NAME	DATA
BRANDING	
CUSTOMARY HOLIDAYS	
DIARY.INI	
RPTSETTINGS.INI	

BRA-RPT

Edit New Delete

**Torexretail**

### Select Item window

### Add a New Store Configuration File

1. To add a new store configuration file, click **New**.
2. Enter the name and the contents of the file.

3. Click **OK** to save and confirm or **Cancel** to disregard.


### **Edit a Store Configuration File**

1. To edit a store configuration file, select the applicable file from the list and click **Edit**.
2. Make any relevant changes and click **OK** to confirm the changes or **Cancel** to disregard.

### **Delete a Store Configuration File**

1. To delete a store configuration file, select the applicable file from the list.
2. Click **Delete**.
3. You will be asked **Are you sure you want to delete this item?** Click **Yes** to confirm or **Cancel** to disregard.


## **File System**

1. To view the File System screen, click  **File System**.
2. For further information on using this screen, see Page 350.


## **Tree Editors**

1. To view the Tree Editors screen, click  **Tree editors**  
Configure hierarchy trees and store listing.

## **Store Listing**

1. To view the Store Listing, click  **Store Listing**.
2. Further information on this screen can be found on page 124.

## **Regions & Stores**

1. To view the Regions & Stores screen, click  **Regions & Stores**.
2. A screen, similar to that below, will be displayed:

## Editing Company Structure

Regions: 3 Stores: 10

Enterprise

Region 1

- 1229 : Birmingham
- 1002 : Coventry
- 1010 : Stratford
- 1004 : Walsall
- 1003 : Wolverhampton
- 1005 : Worcester

Region 2

Available Items

- 1232 : Witney

<< Add

Remove >>

Move Up

Move Down

OK Cancel

Editing Company Structure window

## Adding a Store to a Region

1. To add a store to a region, click on its name on the right hand side of the screen.
2. Click **<< Add**.

## Removing a Store from a Region

1. To remove a store from a region, click on its name on the left hand side of the screen.
2. Click **Remove >>**, which will move the name to the right hand side of the screen.

## Moving a Store in a Region

1. To move a store, click on its name on the left hand side of the screen.
2. Click **Move Up** to move the name up 1 place in the list.
3. Click **Move Down** to move the name 1 place down in the list.

## Levels & Contracts

1. To view the Levels and Contracts screen, click
2. A screen, similar to that below, will be displayed:



## Editing Levels and Contracts Structure

Levels: 1 Contracts: 0

Available

☒ Whole Store

☒ Available Items

- ☐ Management
- ☐ Non-Management

<< Add

Remove >>

Move Up

Move Down

OK Cancel

Editing Levels and Contracts Structure window

## Adding an Item to a Store

1. To add an item to a store, click on its name on the right hand side of the screen.
2. Click **<< Add**.

## Removing an Item from a Store

1. To remove an item from a store, click on its name on the left hand side of the screen.
2. Click **Remove >>**, which will move the name to the right hand side of the screen.

## Moving an Item in a Store

1. To move an item, click on its name on the left hand side of the screen.
2. Click **Move Up** to move the name up 1 place in the list.
3. Click **Move Down** to move the name 1 place down in the list.

## Department & Task Configuration

1. To view the Department & Task Configuration screen, click

**Department & Task Configuration**

Configure department and task list and descriptions.


## Store Groups

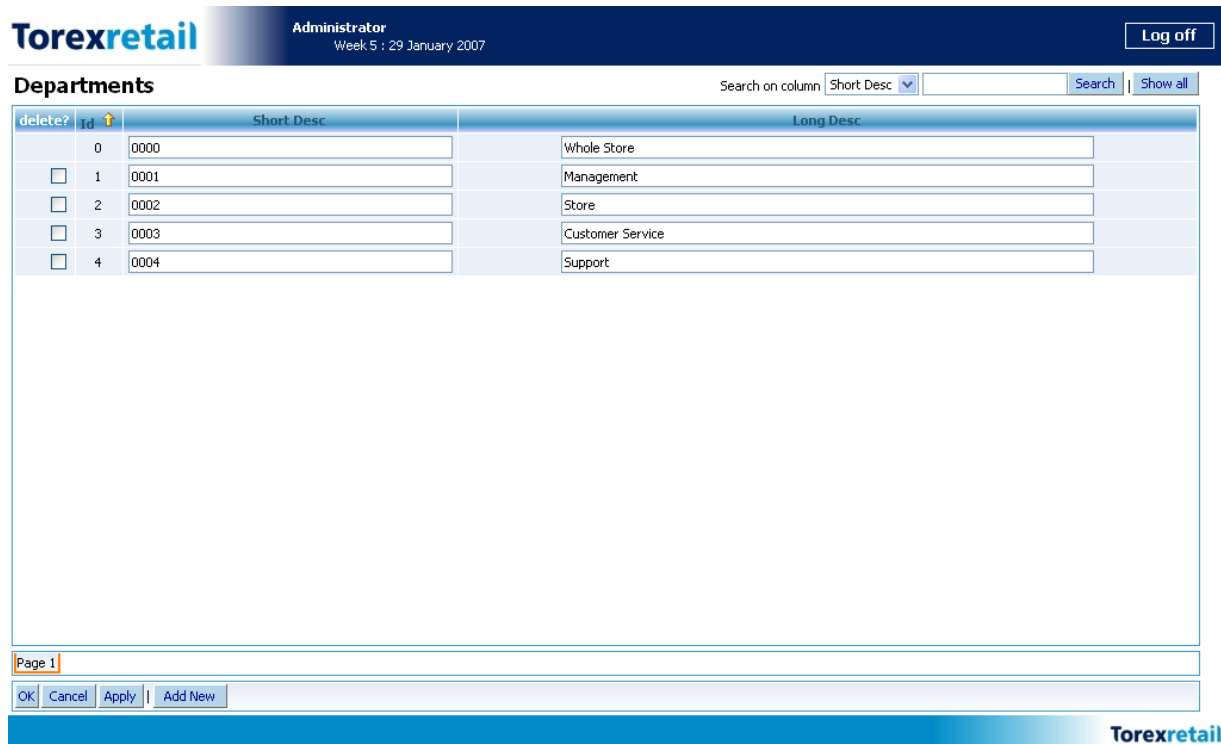
**Store Groups**

1. To view the Store Groups, click
2. Further information on this screen can be found on page 112.



## Department Descriptions

1. To view the Department Descriptions, click  **Department descriptions**.
2. A screen, similar to that below, will be displayed:



delete?	Id	Short Desc	Long Desc
<input type="checkbox"/>	0	0000	Whole Store
<input type="checkbox"/>	1	0001	Management
<input type="checkbox"/>	2	0002	Store
<input type="checkbox"/>	3	0003	Customer Service
<input type="checkbox"/>	4	0004	Support

### Departments window

#### Add a New Department Description

1. To add a new department description, click **Add New** at the bottom of the screen.
2. Enter the relevant information and click **OK** to save and confirm or **Cancel** to disregard.

#### Edit a Department Description

1. To edit a department, make the changes on screen and click **OK** to save and confirm the changes or **Cancel** to disregard.

#### Delete a Department Description

1. To delete a department description, tick the **delete?** box, next to the relevant description.
2. Click **OK**, at the bottom of the screen.
3. A message will be displayed asking **Are you sure you want to delete the selected departments?** Click on **OK** to confirm or **Cancel** to disregard.

#### Searching for an Existing Department Description

The **Department Description** list also contains a **Search** box in the top right hand corner of the screen. It will look similar to that below:


Search on column **Short Desc**

### Search window

This **Search** box allows you to search on 3 columns:

- Short Desc
  - ID
  - LongDesc
1. Select the appropriate column from the list.
  2. Type the relevant word, into the **Search** box.
  3. Click **Search**.
  4. The results will be displayed in the main screen.
  5. Click **Show all** to display all of the parameters again.

## Task Descriptions

1. To view the Task Descriptions, click  **Task descriptions**.
2. A screen, similar to that below, will be displayed:

**Torexretail**

Administrator  
Week 5 : 29 January 2007

Log off

Tasks

Search on column **Short Desc**

delete?	Id	Short Desc	Long Desc
	0	0000	No Task
<input type="checkbox"/>	1	0001	Admin & Management
<input type="checkbox"/>	2	0002	Cash Procedures
<input type="checkbox"/>	3	0003	Checkout
<input type="checkbox"/>	4	0004	Shop
<input type="checkbox"/>	5	0005	Shop Support
<input type="checkbox"/>	6	0006	Cleaning

Page 1

Torexretail

### Tasks window

#### Add a New Task Description

1. To add a new task description, click **Add New** at the bottom of the screen.
2. Enter the relevant information and click **OK** to save and confirm or **Cancel** to disregard.

#### Edit a Task Description

1. To edit a task, make the changes on screen and click **OK** to save and confirm the changes or **Cancel** to disregard.

### Delete a Task Description

1. To delete a task description, tick the **delete?** box, next to the relevant description.
2. Click **OK**, at the bottom of the screen.
3. A message will be displayed asking **Are you sure you want to delete the selected task?** Click on **OK** to confirm or **Cancel** to disregard.

### Searching for an Existing Task Description

The **Task Description** list also contains a **Search** box in the top right hand corner of the screen. It will look similar to that below:

Search on column Short Desc  Search | Show all

#### Search window

This **Search** box allows you to search on 3 columns:

- Short Desc
  - ID
  - LongDesc
1. Select the appropriate column from the list.
  2. Type the relevant word, into the **Search** box.
  3. Click **Search**.
  4. The results will be displayed in the main screen.
  5. Click **Show all** to display all of the parameters again.

## Module Configuration Editors

1. To view the Module Configuration Editors, click



### Module configuration editors

Configure options for specific areas of functionality.

## Breaks Patterns

1. To view the Break Patterns, click
2. A screen, similar to that below, will be displayed:



### Breaks Patterns

Define what breaks apply to which types of shift.



## Select item to edit

Pattern	Shift Length
Default Break Pattern	4.25
Default Break Pattern	6.00
Default Break Pattern	8.00

## Select Item window

## Add a Break Pattern

1. To add a break pattern to the system, click **Add**, at the bottom of the screen.
2. Enter the relevant information and click **OK** to save and confirm or **Cancel** to disregard.

## Edit a Break Pattern

1. To edit a break pattern, click pattern you want to edit. A screen similar to that below will be displayed:

Torexretail

Administrator

Week 22 : 28 May 2007

Home

Log off

Editing Item Break

Select item to edit

ID	Type	Minimum Distance	Window Width	Offset	Length
14	Tea Break (Unpd)	0.00	0.50	-1.50	0.25
14	Tea Break	0.00	0.50	1.00	0.25

Add

Delete

OK

Cancel

Torexretail

### Select Item window

- This screen shows you the breaks which the system will create during a schedule run for those employees assigned to this break pattern. Each has their own settings, which can be accessed by clicking break you want to amend. Doing so will open a screen which contains the following:

### Editing item Break Config

ID	14
Type	Tea Break
Minimum Distance	0.00
Window Width	0.50
Offset	1.00
Length	0.25
Join Other Breaks	<input type="checkbox"/>
BreakMustJoin	<input type="checkbox"/>
<div>Key</div>	


### Editing Item Break Config window

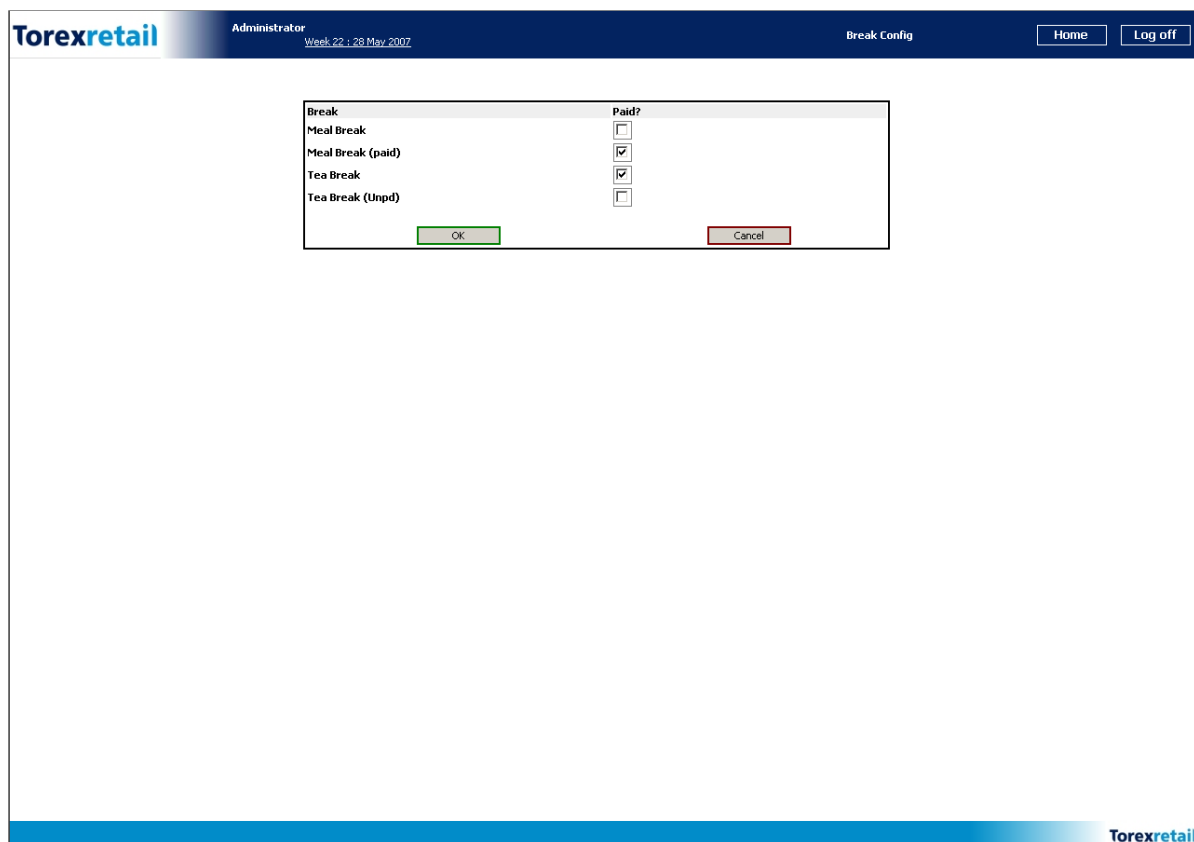
- This screen is where you are able to tell the system that certain breaks must be joined together chronologically. Any breaks in the break pattern you are in that have the **BreakMustJoin** option ticked will be scheduled next to each other. Make any other applicable changes and click **OK** to save the changes or **Cancel** to disregard.

## Delete a Break Pattern

1. To delete a break pattern, click **Delete**, at the bottom of the screen.
2. Click pattern you want to delete.
3. You will be asked **Are you sure you want to delete this item?** Click on **Yes** to confirm or **Cancel** to disregard.
4. Repeat steps 2 and 3 above to delete more patterns or click **Done** to return to the previous screen.

## Break Config

1. To view the Break Config screen, click  **Break Config** Define which break types are paid.
2. A screen, similar to that below, will be displayed:



Break	Paid?
Meal Break	<input type="checkbox"/>
Meal Break (paid)	<input checked="" type="checkbox"/>
Tea Break	<input checked="" type="checkbox"/>
Tea Break (Unpd)	<input type="checkbox"/>

OK Cancel

### Break Config window

3. Tick which breaks should be paid and click OK to save and confirm or Cancel to disregard. These settings will be used to determine whether or not the break in question will be paid or not, which is used when setting up break patterns (see above).

## Schedule Window Config

This screen is used in conjunction with the Schedule Window Status and sets the times when a Schedule Rerun can occur.

1. To view the Schedule Window Config screen, click  **Schedule Window Config** Edit Schedule Window.

2. A screen, similar to that below, will be displayed:

**Torexretail**

Administrator  
Week 6 : 05 February 2007

HomeLog off

### Schedule Window Configuration

Clicking on a cell will toggle the time period between active and inactive states.  
Consecutive active time periods comprise a Schedule Window.


	00:00	01:00	02:00	03:00	04:00	05:00	06:00	07:00	08:00	09:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00	19:00	20:00	21:00	22:00	23:00
Mon																								
Tue																								
Wed																								
Thu																								
Fri																								
Sat																								
Sun																								

SaveCancel

**Schedule Window Configuration window**

- 3. Click on one of the cells to activate that time period. Click on it again to deactivate it.
- 4. When complete, click **Save** to confirm the changes or **Cancel** to disregard.

**T&A Action Configuration**

- 1. To view the T & A Action config screen, click  **T&A Action Config**.
- 2. A screen, similar to that below, will be displayed:

## Select item to edit

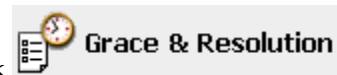
Action Type	Rule Type	Applied To	Threshold Value	Authorise Action	Deny Action
Early Finish	Early	Shift Out	4	Pay Worked	Pay Scheduled
Early Start	Early	Shift In	5	Pay Worked	Pay Scheduled
Extra Hours Worked	More Hours	Total Worked Hours	10	Pay Worked	Pay Scheduled
Late Finish	Late	Shift Out	5	Pay Worked	Pay Scheduled
Late Start	Late	Shift In	4	Pay Worked	Pay Scheduled
Unplanned Absence	Less Hours	Total Worked Hours	30	Apply Absence	Pay Scheduled

## Select Item window

3. To edit an action, click on one of the lines.
4. Make the relevant changes and click **OK** to save and exit or **Cancel** to disregard.

## Grace &amp; Resolution

1. To view the Grace and Resolution screen, click
2. A screen, similar to that below, will be displayed:





## Global Settings - To Save Values Click Change Button

Infer Using Contracted Times



Link To Expected Plan



Change

Cancel

## Config Settings - To Change, Select Shift Type, Contract Type and click Go

Shift



Management



Go

Cancel

## Global Settings window

## Global Settings

1. Select the applicable settings from the lists and click **Change** to apply your choice.

## Config Settings

1. To change the config settings, select the relevant options from the list and click **Go**.
2. A screen, similar to that below, will be displayed:

## Grace &amp; Resolution Configuration

ShiftType: Tea Break

ContractType: Management

In		Out		Length
EarlyIn	Apply grace and resolution ▼	EarlyOut	Do not apply rounding ▼	<input checked="" type="checkbox"/> Infer length
LateIn	Do not apply rounding ▼	LateOut	Do not apply rounding ▼	<input checked="" type="checkbox"/> Infer if within threshold
InferIn	Do not infer ▼	InferOut	Do not infer ▼	<input type="checkbox"/> Use a static threshold
GraceInmins	0.00	GraceOutmins	0.00	<input checked="" type="checkbox"/> Based on Tea Break length
ResolutionInmins	0.00	ResolutionOutmins	0.00	Length <input type="text"/> Threshold <input type="text"/> +

Apply to additional contract(s) ☐ Non-Management

OK

Cancel

## Grace &amp; Resolution Configuration window

3. Select the relevant Grace and Resolution settings for the **In** section.
4. Select the relevant Grace and Resolution settings for the **Out** section.
5. Select the relevant Length information to be applied.
6. Additional contracts will be listed at the bottom of the screen. To apply these settings to those additional contracts, tick the box next to the relevant one(s).
7. When ready, click **OK** to save and confirm or **Cancel** to disregard.

## HR Cost Models

1. To view the HR Cost Models options, click



HR Cost Models

## Absence Config

1. To view the Absence Config screen, click
2. For further information on this screen, see Page 333.



Absence Config

## Models

1. To view the Models screen, click
2. A screen, similar to that below, will be displayed:



Models

## HR Cost Models

Select	Short description	Long description	Comments	Delete ?
<input type="radio"/>	1	Management		<input type="checkbox"/>
<input type="radio"/>	2	Non-Management		<input type="checkbox"/>

Edit details... | Apply | Cancel | New | Delete | Home

## HR Cost Models window

## Add a New Model

1. To add a new model to the system, click **New**.
2. Enter the details and click **OK** to save and confirm or **Cancel** to disregard.


## Edit a Model

1. To edit a model, click in the **Select** circular, next to the applicable model and click **Edit Details...**
2. Make the appropriate changes and click **OK** to save and confirm or **Cancel** to disregard.

## Delete a Model

1. To delete a model, tick the **Delete?** tick box, next to the relevant model.
2. Click **Delete**, at the bottom of the screen.
3. You will be asked to confirm the deletion and to assign a replacement. Select the relevant model from the list and click **OK** to confirm or **Cancel** to disregard.

## Categories

1. To view the Categories screen, click  **Categories**.
2. A screen, similar to that below, will be displayed:

## HR Cost Model Categories

Short description	Long description	Comments	Delete ?
<input type="text" value="Default"/>	<input type="text" value="Default"/>	<input type="text"/>	<input type="checkbox"/>

Apply Cancel New Delete Home

## HR Cost Model Categories window

## Add a New Category

1. To add a new category, click **New**.
2. Enter the relevant information and click **OK** to save and confirm or **Cancel** to disregard.


## Edit a Category

1. To edit a category, make any applicable changes on the screen and click **Apply** to save the changes or **Cancel** to disregard.

## Delete a Category

1. To delete a Category, click in the **Delete?** tick box, next to the relevant category.
2. Click **Delete**.
3. You will be asked to **Confirm delete?** Select the replacement category from the list and click **OK** to confirm or **Cancel** to disregard.

## Bands

1. To view the Bands screen, click  **Bands**.
2. A screen, similar to that below, will be displayed:

## Cost bands

Short description	Long description	Comments	Delete ?
0	Basic Rate		<input type="checkbox"/>
1	OT 1.5		<input type="checkbox"/>
2	TOIL		<input type="checkbox"/>
3	Bank Holiday		<input type="checkbox"/>

Apply Cancel New Delete Home

## Cost Bands window

## Add a New Band

1. To add a new band, click **New**.
2. Enter the relevant information and click **OK** to save and confirm or **Cancel** to disregard.

## Edit a Band

1. To edit a band, make any applicable changes on the screen and click **Apply** to save the changes or **Cancel** to disregard.

## Delete a Band

1. To delete a band, click in the **Delete?** tick box, next to the relevant band.
2. Click **Delete**.
3. You will be asked to **Confirm delete?** Select the replacement band from the list and click **OK** to confirm or **Cancel** to disregard.

## NIC Tables



1. To view the NIC Tables screen, click
2. A screen, similar to that below, will be displayed:

## NIC Tables

Select	Short description	Long description	Comments	Delete ?
<input type="radio"/>	Default	Default		<input type="checkbox"/>

Edit details... | Apply | Cancel | New | Delete | Home

## NIC Tables window

## Add a New NIC Table

1. To add a new NIC Table to the system, click **New**.
2. Enter the details and click **OK** to save and confirm or **Cancel** to disregard.

## Edit an NIC Table

1. To edit an NIC Table, click in the **Select** circular, next to the applicable table and click **Edit Details...**
2. Make the appropriate changes and click **OK** to save and confirm or **Cancel** to disregard.

## Delete an NIC Table

1. To delete an NIC Table, tick the **Delete?** tick box, next to the relevant table.
2. Click **Delete**, at the bottom of the screen.
3. You will be asked to confirm the deletion and to assign a replacement. Select the relevant NIC Table from the list and click **OK** to confirm or **Cancel** to disregard.

## Pension Schemes

1. To view the Pension Schemes screen, click
2. A screen, similar to that below, will be displayed:



## Pension Schemes

Select	Short description	Long description	Comments	Delete ?
<input type="radio"/>	Default	Default		<input type="checkbox"/>

Edit details... | Apply | Cancel | New | Delete | Home

## Pension Schemes window

## Add a New Pension Scheme

1. To add a new Pension Scheme to the system, click **New**.
2. Enter the details and click **OK** to save and confirm or **Cancel** to disregard.

## Edit a Pension Scheme

1. To edit a Pension Scheme, click in the **Select** circular button, next to the applicable scheme and click **Edit Details...**
2. Make the appropriate changes and click **OK** to save and confirm or **Cancel** to disregard.

## Delete a Pension Scheme

1. To delete a Pension Scheme, tick the **Delete?** tick box, next to the relevant scheme.
2. Click **Delete**, at the bottom of the screen.
3. You will be asked to confirm the deletion and to assign a replacement. Select the relevant scheme from the list and click **OK** to confirm or **Cancel** to disregard.

## Cost Model Scenarios



1. To view the Cost Model Scenarios, click
2. A screen, similar to that below, will be displayed:

## Scenario checker

All shifts long than 4.00 hours are allocated ½ hour unpaid breaks

Select model 1 : Management

Basic 0.00 hourly

Days	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Totals
Statutory Holidays	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Contract</b>								
Start	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Stop	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<b>Actuals</b>								
Start	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Stop	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

Calc

## Scenario Checker window

3. Select the relevant model from the list and enter the basic hourly wage.
4. Select any **Statutory Holidays**, by ticking the box, under the relevant day(s).
5. Enter the contracted **Start** and **Stop** hours and the Actuals.
6. Click **Calc**, in the bottom right hand corner, to run the scenario.
7. The results will be displayed at the bottom of the screen.

## Task Schedule Options



Task Schedule Options

1. To view the Task Schedule Options, click
2. A screen, similar to that below, will be displayed:



## Select item

TaskName ↑	MinTransLength	TaskPos
0001 : Admin & Management	1.00	0
0002 : Cash Procedures	1.00	0
0003 : Checkout	0.25	0
0004 : Shop	0.50	0
0005 : Shop Support	1.00	0
0006 : Cleaning	1.00	0

-000

EditNewDelete

## Select Item window

## Add a New Task Schedule

1. To add a new task schedule, click **New**, at the bottom of the screen.
2. Fill in all of the relevant information and click **OK** to save or **Cancel** to disregard.

## Edit a Task Schedule

1. To edit a task schedule, click relevant schedule in the list.
2. Click **Edit**.
3. Make any applicable changes and click **OK** to save and confirm the changes or **Cancel** to disregard.

## Delete a Task Schedule

1. To delete a task schedule, click applicable schedule and click **Delete**.
2. You will be asked to confirm the deletion. Click **OK** to confirm or **Cancel** to disregard.

## Absence Config




1. To view the Absence Config screen, click
2. A screen, similar to that below, will be displayed:

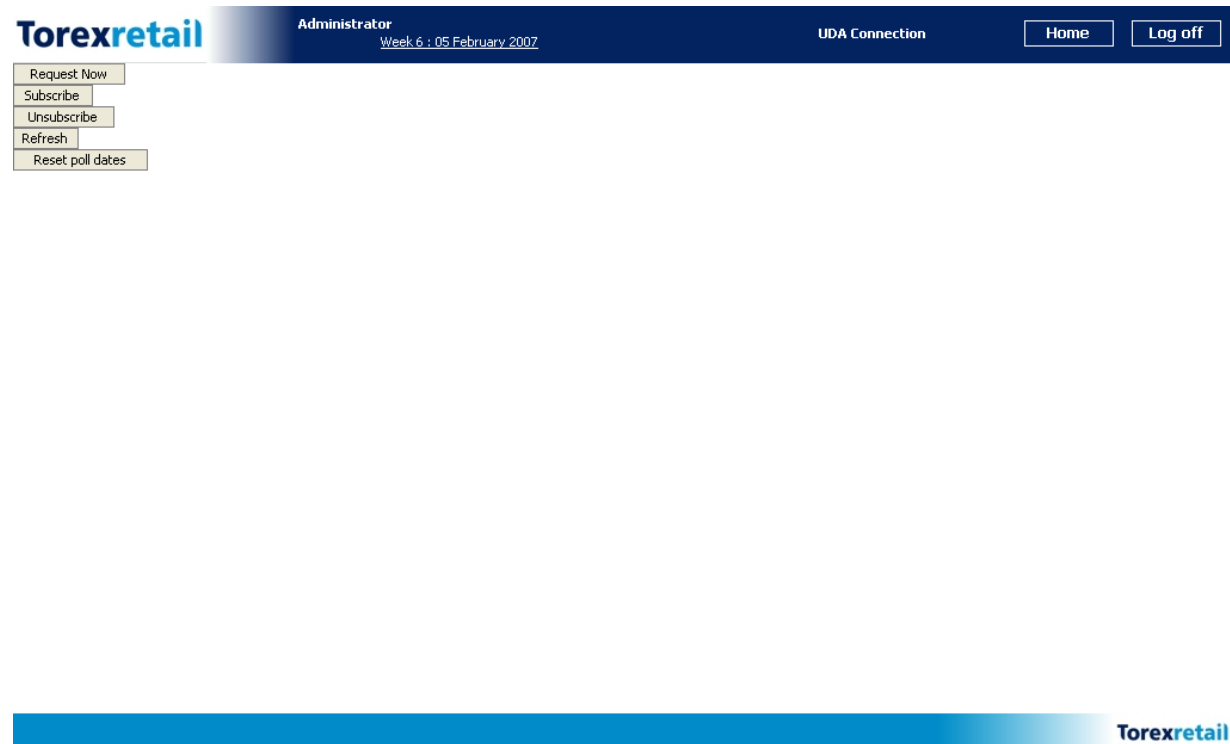


---

## UDA Connection


The UDA Connection is a bespoke screen used to connect 3<sup>rd</sup> party software to the system. This screen is no longer used.

1. To view the UDA Connection screen, click  **UDA Connection**.
2. A screen, similar to that below, will be displayed:



UDA Connection window

## Autorun

1. To view the Autorun screen, click  **Autorun**.
2. A screen, similar to that below, will be displayed:

**Autorun Manager**● Autorun is currently active. [Stop](#)[Refresh jobs](#)


Name	Last run	Next run	Run now
CLEAROTP	N/A	Mon Feb 12 03:30:00 GMT 2007	<a href="#">Run now</a>
PLANEXPORT	N/A	Wed Feb 07 00:00:00 GMT 2007	<a href="#">Run now</a>

**Autorun Manager window**

- Any jobs which have been set to autorun at set times, will be displayed here.
- Clicking **Stop**, at the top of the screen, will disable the autorun functionality. When clicked, the button will change to a **Start** button. Click this to re-enable the autorun functionality.
- Clicking **Refresh Jobs** will force the system to check for additional autorun jobs. If found, they will be displayed in the list.
- To activate one of the jobs now, Click **Run Now**, next to the applicable job.

## Drop Field Cache

If changes are made to parts of the system, but are not appearing on screen, this section can be used to force the system to refresh itself and use the new settings.

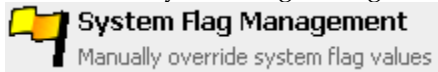
- To view the Drop Field Cache screen, click  **Drop field cache**.
- A screen, similar to that below, will be displayed:

**System Field Options Cache Refresh****System Field Options Cache Refresh window**

3. Click **Refresh** to refresh the cache.

**System Flag Management**

1. To view the System Flag Management screen, click



2. A screen, similar to that below, will be displayed:

Administrator

Week 5 : 29 January 2007

System Flag Management

Home

Log off

REGIONS.STORE NAMES.false

Flag Name

	<input type="checkbox"/>	Absences Updated
	<input type="checkbox"/>	Current Schedule Viewed
	<input type="checkbox"/>	Department Schedule Report Printed
	<input type="checkbox"/>	Employee Details Updated
	<input type="checkbox"/>	Forecast Generated
	<input type="checkbox"/>	KPI's Reviewed
	<input type="checkbox"/>	OTP Committed
	<input checked="" type="checkbox"/>	OTP Report Printed
	<input type="checkbox"/>	Schedule Edited
	<input type="checkbox"/>	Schedule Run
	<input type="checkbox"/>	T&A Issues Updated
	<input type="checkbox"/>	T&A Plan Edited

OK

Cancel

Apply

### Flag Name window

3. Tick or untick the relevant boxes.
4. Clicking filter link, in the top left hand corner of the screen, will allow you to select the stores that these changes will be applied to.

1229 : Birmingham -- Web Page Dialog

REGIONS.STORE NAMES.false

filter

☒ Enterprise

☒ Region 1

☒ 1229 : Birmingham

☒ 1002 : Coventry

☒ 1010 : Stratford

☒ 1004 : Walsall

☒ 1003 : Wolverhampton

☒ 1005 : Worcester

☒ Region 2

☒ 1007 : Derby

☒ 1006 : Leicester

☒ 1008 : Nottingham

☒ 1009 : Stoke


OK

Cancel

### Filter window

- 5. Once all of the options have been selected, click **Apply** to make the changes and then **OK** to leave the screen.
- 6. Click **Cancel** to disregard any changes, but be aware that if you Click **Apply** first, the **Cancel** will have no effect.

System Upgrade History

- 1. To view the System Upgrade History screen, click  **System Upgrade History**.
- 2. A screen, similar to that below, will be displayed:

TorexretailAdministratorWeek 5 : 29 January 2007HomeLog off

Job #	Status	Last Run	Description	Marked as Run
1	Success	03-Aug-2005 13:15:02	Add JOBDESC column to TBLUPGRADEHISTORY	No
2	Success	03-Aug-2005 13:15:02	Add MARKEDASRUN column to TBLUPGRADEHISTORY	No
3	Success	03-Aug-2005 13:15:02	Modified JOBDESC in TBLUPGRADEHISTORY to be 1024 chars in length	No
4	Success	03-Aug-2005 13:15:02	ALTER TABLE TBLEXCEPTIONOPTIONS ADD INCAPT INT NULL	No
5	Success	03-Aug-2005 13:15:02	dbpatch 47 - Create TBLNOTICEBOARD,TBLNOTICEBOARDLINKS,VWNOTICEBOARD	No
6	Success	03-Aug-2005 13:15:02	Add ADDITIONALCOST column to TBLFORECASTVIEW	No
7	Success	03-Aug-2005 13:15:02	Add ADDITIONALCOST to VIEW TBLFORECASTTASKVIEW	No
8	Success	03-Aug-2005 13:15:02	Insert MESSAGE IMPORTANCE descriptions to tblHashTable	No
9	Success	03-Aug-2005 13:15:02	dbpatch 51 - Create TBLSYSTEMFLAGS and populate hashtable	No
10	Success	03-Aug-2005 13:15:02	dbpatch 52 - update tblnoticeboard values	No
11	Success	03-Aug-2005 13:15:02	dbpatch 53 - create tblDeptSystemMetric	No
12	Success	03-Aug-2005 13:15:02	dbpatch 54 - Default config for realtime schedule viewer	No
13	Success	03-Aug-2005 13:15:02	dbpatch 55 - Create TBVWORKLOADSUMMARY	No
14	Success	03-Aug-2005 13:15:02	dbpatch 56 - Create TBVEMPLOYEEBALANCES	No
15	Success	03-Aug-2005 13:15:02	dbpatch 57 - create TBVEMPLOYEEEXCPHOURS	No
16	Success	03-Aug-2005 13:15:02	Add VARHOURS, FIXHOURS column to TBLMODELTASK	No


Refresh

Torexretail

System Upgrade History window

- 3. Clicking **Refresh** will update the screen.

System Error Test

- 1. To run a System Error test, click  **System Error Test**.
- 2. A screen, similar to that below, will be displayed:

## Servlet Error Handling Test

Select error type:

### Test Error window

3. Select the relevant error from the list and click **Test Error** to display the applicable error message.

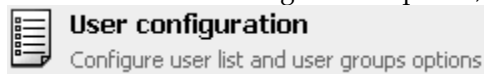
## SQL Query Tool



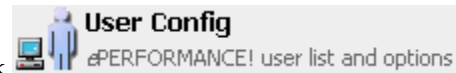
1. To run the SQL Query Tool, click
2. For further information on using this screen, see Page 354.

## User Configuration

1. To view the User Configuration options, click



## User Config



1. To view the User Configuration screen, click
2. A screen, similar to that below, will be displayed:



## Select item

UserName	Logon	Password
Administrator	administrator	admin

Adm

Edit New Delete

## Select Item window

## Adding a New User

1. To add a new user to the system, click **New**.
2. A screen, similar to that below, will be displayed:

## New item

UserName

Logon

Password  Enter Passwords:

Enter Again:

UserGroup

Email

## HomeCompany

- Enterprise
  - Region 1
    - 1229 : Birmingham
    - 1002 : Coventry
    - 1010 : Stratford
    - 1004 : Walsall
    - 1003 : Wolverhampton
    - 1005 : Worcester
  - Region 2
    - 1007 : Derby

Key

OK

Cancel

## New Item window

3. Type in a suitable **UserName** and **Logon**. The Logon will be needed to access the system.
4. Type in the **Password**, which can be case sensitive.
5. Enter the **Password** again, to confirm it has been typed correctly.
6. Select the appropriate **UserGroup** from the list.
7. Enter an **Email** address, if applicable.
8. Select the relevant **HomeCompany** by clicking on it.
9. Once complete, click **OK** to save and confirm or **Cancel** to disregard.


### Editing a User


1. To edit a user, click on their name. They will become highlighted.
2. Click **Edit**.
3. Make any changes and click **OK** to save and confirm or **Cancel** to disregard.

### Deleting a User

1. To delete a user from the system, click on their name. They will become highlighted.
2. Click **Delete**.
3. You will be asked **Are you sure you want to delete this item?** Click **Yes** to confirm or **Cancel** to disregard.

## User Groups

1. To view the User Groups, click  **User Groups**.
2. A screen, similar to that below, will be displayed:



UserGroupId	GroupDescription	AccessLevel
2	Assistant Manager	Admin Store User
1	Manager	Power User
3	Store Manager	User
-1	System Administrator	Administrator

Select Item window

## Adding a New User Group

1. To add a new user group, click **New**.
2. A screen, similar to that below, will be displayed:

The screenshot shows the 'New item' window in the Torexretail Administrator interface. The window has a dark blue header with the 'Torexretail' logo, the title 'Administrator', the date 'Week 5 : 29 January 2007', and a 'Log off' button. The main content area is white and contains several form fields and two tree views.

**Form Fields:**

- GroupDescription:** A text input field.
- AccessLevel:** A dropdown menu with 'Please Select...' as the current selection.
- HomePage:** A dropdown menu with '/jsp/home.jsp' as the current selection.
- HomeResetDate:** A date picker icon.

**Tree Views:**

- HomeHR:** A tree structure showing levels of hierarchy. The root is 'Whole Store', which branches into 'Level 1', 'Level 2', and 'Level 3'. 'Level 2' branches into 'Non-Management' and 'Management'.
- HomeOrg:** A tree structure showing organizational levels. The root is '0000 : Whole Store', which branches into '0001 : Management' and '0002 : Store'. '0001 : Management' branches into '0001 : Admin & Management' and '0002 : Cash Procedures'. '0002 : Store' branches into '0004 : Shop', '0003 : Customer Service', and '0004 : Support'. '0003 : Customer Service' branches into '0003 : Checkout', and '0004 : Support' branches into '0005 : Shop Support'.

At the bottom of the window, there are two buttons: 'OK' (green border) and 'Cancel' (red border). The Torexretail logo is visible in the bottom right corner of the window.

### New Item window

3. Enter an appropriate **Groupdescription**.
4. Select the relevant **AccessLevel** from the list.
5. Select the appropriate **HomePage** from the list:
6. /jsp/diary.jsp – only allows the user access to the diary, when they logon.
7. /jsp/home.jsp – Gives the user access to the whole system, when they logon.
8. Select or deselect the HomeResetDate.
9. Select the appropriate **HomeHR** and **HomeOrg** levels.
10. Once complete, click **OK** to save and confirm or **Cancel** to disregard.

## Editing a User Group

1. To edit a user group, click name. It will become highlighted.
2. Click **Edit**.
3. Make any changes and click **OK** to save and confirm or **Cancel** to disregard.

## Deleting a User Group

1. To delete a user group from the system, click name. It will become highlighted.
2. Click **Delete**.
3. You will be asked **Are you sure you want to delete this item?** Click **Yes** to confirm or **Cancel** to disregard.

---

## Company Perm

The Company Perms screen allows you to change the number of users who can log into a store at the same time. The password to access this screen must be supplied by Torex Retail. Contact your account manager for more information.

1. To view the Company Perms screen, click



2. A screen, similar to that below, will be displayed:

A screenshot of the 'Concurrent User Login' screen. At the top is a dark blue header bar with the 'Torexretail' logo on the left, 'Administrator' and 'Week 6 : 05 February 2007' in the center, and 'Company Perms' on the right. On the right side of the header are two buttons: 'Home' and 'Log off'. Below the header, the title 'Concurrent User Login' is displayed. Underneath, there is a label 'Enter Password' followed by a text input field. Below the input field is a 'Submit' button.A screenshot of the top part of the 'Concurrent User Login window'. It features a blue gradient header bar with the 'Torexretail' logo on the right side.

### Concurrent User Login window

3. Enter the relevant password and click **Submit**.
4. A screen, similar to that below, will be displayed:

## Select item

There are no items on this page

Edit

New

Delete

## Select Item window

## Add a New Setting

1. To add a new setting, click **New** at the bottom of the screen.
2. A screen, similar to that below, will be displayed:

## New item

ConcurrentUsers

0

## Region/Store

- Enterprise
  - Region 1
    - 1229 : Birmingham
    - 1002 : Coventry
    - 1010 : Stratford
    - 1004 : Walsall
    - 1003 : Wolverhampton
    - 1005 : Worcester
  - Region 2
    - 1007 : Derby

Key

OK

Cancel

## New Item window

3. Enter the number of concurrent users and select the **Region/Store** from the list.
4. When ready, click **OK** to save and confirm or **Cancel** to disregard.


### Edit a Setting

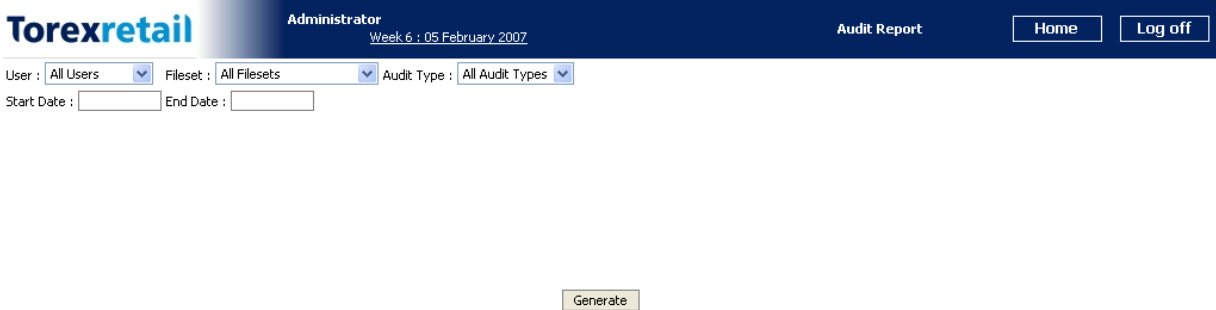
1. To edit a setting, click name in the list and click **Edit**.
2. Make any applicable changes and click **OK** to save and confirm or **Cancel** to disregard.

### Delete a Setting

1. To delete a Concurrent User Setting, click on its name in the list and click **Delete**.
2. You will be asked **Are you sure you want to delete this item?** Click **Yes** to confirm or **Cancel** to disregard.

## Audit Report

1. To view the Audit Report screen, click  **Audit Report**.
2. A screen, similar to that below, will be displayed:



**Torexretail** Administrator Week 6 : 05 February 2007 Audit Report Home Log off

User : All Users Fileset : All Filesets Audit Type : All Audit Types

Start Date : End Date :

Generate

### Audit Report window

3. Select the relevant **User** from the list
4. Select the relevant **Fileset** from the list
5. Select the relevant **Audit Type** from the list
6. Enter a **Start** and **End Date**.
7. When ready, click **Generate**.
8. The following report screen will be displayed:

---

Print Report

Close

Store Name : 1229 : Birmingham

Report Title : Audit Report

Printed By : Administrator

Filtered By :

Week : 05/02/07

Printed : 05 February 2007

All Users, All Filesets, All Audit Types, from \* to \*

User	Fileset	Date	Time	Module	Field	Action	RowIndex	OldValue	NewValue	Employee
------	---------	------	------	--------	-------	--------	----------	----------	----------	----------

### Report window

9. The report shows an audit trail for the selected user.
10. To print the report, click **Print Report** at the top of the screen.
11. Click **Close** to exit the screen.

## Import Clockings

1. To manually import the clockings data, click
2. A screen, similar to that below, will be displayed:



Import Clockings

**Torexretail**

Administrator

Week 5 : 29 January 2007

Import Clockings

Home

Log off

MEM.ClockFiles

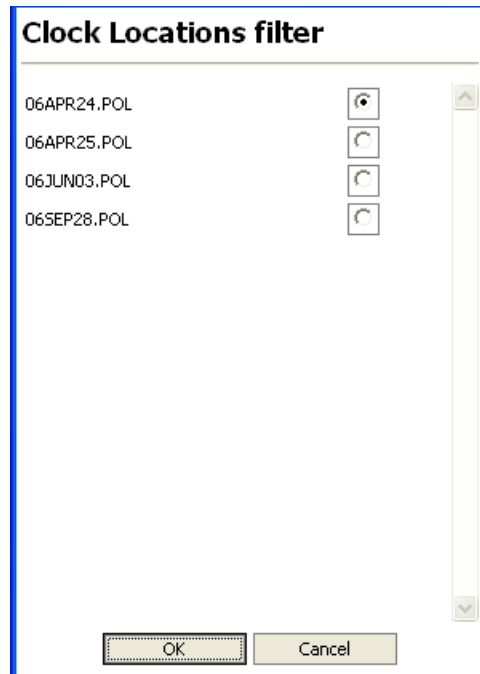


Select Import File, using the Filter, then Click  to Start Import

**Torexretail**

### Import Clockings window


3. To select the file to import, click Clockfiles link, in the top left hand corner of the screen.
4. A window, similar to that below, will be displayed:



**Filter window**

5. The system will look in the specified location and display any files with a **.pol** extension. Select the appropriate file and click **OK** to confirm or **Cancel** to disregard.
6. Click **Go**, to begin the import process.

## Template Info

1. To view the template info screen, click  **Template Info**.
2. A screen, similar to that below, will be displayed:



CLEAR

Filename	Tags
C:\Program Files\Apache Software Foundation\Tomcat 5.5\webapps\Performance\templates\mvc\controls.html	home, scriptFile, isPopup, buttonName, buttonScript, embeddedScript, scriptPath, buttonLabel
C:\Program Files\Apache Software Foundation\Tomcat 5.5\webapps\Performance\templates\mvc\messagenew.html	itemType
C:\Program Files\Apache Software Foundation\Tomcat 5.5\webapps\Performance\templates\rep\RepGenPage.html	REP_FILE_OPT_VAL, GEN_BUTTON_NAME, REP_TITLE, REP_FILE_OPT_DESC, IN_NAME, REPGEN_JSP_NAME, REP_JSP_NAME, PLANTYPE, IN_VAL, GEN_CLICK_SCRIPT
C:\Program Files\Apache Software Foundation\Tomcat 5.5\webapps\Performance\templates\rep\repHeader.html	PrintDate, CurrentWeek, BranchName, Title, WeekNo, filterTitle, filterList, UserName, periodNumber
C:\Program Files\Apache Software Foundation\Tomcat 5.5\webapps\Performance\templates\mvc\overview.html	rowindex, CUSTOMPARAMS, mode, filterId, home, navi, SHOWHIDEHOME, progressFrame, isPopup
C:\Program Files\Apache Software Foundation\Tomcat 5.5\webapps\Performance\templates\navi.html	CurrentForm, FILTER_ID, LINKCAPTION, Info, NosellItems, CustSubmit, IMPNAVISCRIPT, SellItems, IMGUPR, Id3, Id1, LINKACTION, IMGUPG, JSPPath, IMGDOWNR, SELECTION, LINKIMG, ACTIVESTATUS, Action, CurrentSubType, IMGDOWNG, INITIALARROW, Label, IFrameName
C:\Program Files\Apache Software Foundation\Tomcat 5.5\webapps\Performance\templates\redirect.html	url, content
C:\Program Files\Apache Software Foundation\Tomcat 5.5\webapps\Performance\templates\mvc\messagedelete.html	itemName, LOCK_MESSAGE
C:\Program Files\Apache Software Foundation\Tomcat 5.5\webapps\Performance\templates\mvc\messageedit.html	itemName, LOCK_MESSAGE
C:\Program Files\Apache Software Foundation\Tomcat 5.5\webapps\Performance\templates\mvc\listselect.html	AddnCustInputs, rowIndex, fieldVal, label, ENABLEFLAGS, imagePath, filterId, home, id, AddnInputs, tabLabel, tabFilterId, fieldId, LOCKIMAGE, scriptPath
C:\Program Files\Apache Software Foundation\Tomcat 5.5\webapps\Performance\templates\mvc\itemedit.html	tableName, AddnInputs, fieldhelpurl, propedit, maxlength, req, helpiconurl, checkFieldVal, filterId, fieldLabel, RowIndex, rows, jspPath, customId, subtype, fieldVal, validation, customHtml, fieldDesc, size, selected, mode, rootPath, target, action, AddnCustInputs, cols, isPopup, Title, styleURL, scriptPath, calendar, linkURL, html, linkLabel, fieldItemVal, ctrlclass, radioLabel, sectionName, fieldname
C:\Program Files\Apache Software Foundation\Tomcat 5.5\webapps\Performance\templates\mvc\multiedit.html	tableName, AddnInputs, propedit, maxlength, req, imagePath, checkFieldVal, filterId, RowIndex, rows, jspPath, customId, subtype, fieldVal, validation, idx, fieldDesc, id, tabFilterId, size, selected, mode, rootPath, home, target, action, LOCKIMAGE, AddnCustInputs, cols, tabLabel, isPopup, fieldId, scriptPath, calendar, linkURL, html, linkLabel, fieldItemVal, ctrlclass, label, radioLabel, sectionName, fieldname
C:\Program Files\Apache Software Foundation\Tomcat 5.5\webapps\Performance\templates\mvc\messageselect.html	home, paramValue, target, itemType, findText, paramName
C:\Program Files\Apache Software Foundation\Tomcat 5.5\webapps\Performance\templates\excifilt.html	NaviSubmit, NaviPath, ItmDesc, NaviId, ItmChecked, ItmId


### Template Info window

- When you access a part of the system, which uses a set template, a log of the fields used in that template is recorded here.
- To clear the log, click **Clear** at the top of the screen.

## Record Lock Admin

This screen indicates if any screens are currently being accessed by another user. If your web browser crashes, the system may think that a user is still logged into parts of the software. Use this screen to clear any unneeded locks.


**Record Lock Admin**

- To view the Record Lock Admin screen, click  **Record Lock Admin**.
- A screen, similar to that below, will be displayed:

**Record Locking Administration**

Clear Selected

Refresh Locks

Clear <input type="checkbox"/>
<b>Schedule</b>
Lock Index: 3:39116:7
<input type="checkbox"/> Administrator Mon Feb 05 11:25:59 GMT 2007

**Record Locking Administration window**

3. Click in the **Clear** tick box and then Click **Clear Selected** to reset any system locks.
4. Click **Refresh** to refresh the screen and force the system to check for any new locks.

## File System

**File System**

1. To view the File System screen, click
2. A screen, similar to that below, will be displayed:

## Select item

DIR	FILENAME	SIZE
kpi	kpi.xml	1398
otp	otp.xml	6423
hr	additionalhoursoptions.xml	535
systemcalendar	systemcalendar.xml	4352

1-7

EditNewDelete

Select Item window

## Add a New File

1. To add a new file to the system, click **New**.
2. Enter the relevant filenames and enter the information into the **Data** field.
3. When ready, click **OK** to save and confirm or **Cancel** to disregard.

## Edit a File

1. To edit one of the files, select the relevant name in the list and click **Edit**.
2. Change the applicable information and click **OK** to save or **Cancel** to disregard.

## Delete a File

1. To delete a file, select the relevant name in the list and click **Delete**.
2. You will be asked **Are you sure you want to delete this item?** Click **Yes** to confirm or **Cancel** to disregard.

## Task Managers



### Task Managers

1. To view the Task Managers screen, click
2. A screen, similar to that below, will be displayed:

## Background Task Administrator

[Abort All](#)[SCHEDULE](#) [OTP](#) [CLOCKPOLLING](#) [CLEARVIEW](#) [SYSTEM](#)

Completed (1)

Desc	Created	Started	Finished	Elapsed	Running Time	Host
Recruitment for 3:39102	2007-01-24 09:06:32.01	2007-01-24 09:06:32.12	2007-01-24 09:06:33.913	1.903 sec	1.793 sec	laptop-001193

No messages

[hide messages](#) [disable scroll](#)[Refresh](#)[Home](#)

## Background Task Administrator window

3. This screen shows any background processes which are currently running.
4. Clicking tabs at the top of the screen, will show any processes running for that section.
5. Click **Abort All** to cancel all processes.
6. Click **Hide Messages** link at the bottom of the screen to hide any information which explains how the process is progressing
7. The messages at the bottom of the screen will automatically update when new information is to be displayed. Click **Disable Scroll** link to disable this automatic update.

## Message Log

**Message Log**

1. To view the Message Log screen, click
2. A screen, similar to that below, will be displayed:

**Message Log**

(messages since 2007-02-06 11:27:58.372)

Id	Date/Time	Section	Level	User	Code	Msg
No data						

**Message Log window**

3. This screen lists system processing data, similar to that displayed in the Background Task Administrator.

## Store Groups



1. To view the Store Groups, click .
2. Further information on this screen can be found on page 112.

## Select Fileset



1. To access the select fileset screen, click .
2. Further information on this screen can be found on page 174.

## Configure Schedule / Plan Validation and Alerts

1. To select the employment rules which when broken alert / warn the user, click on **Module Configuration Editors**, then **Validation Rules**
2. A screen similar to that below will be displayed.

00701 : PCW: CHEL TENHAM - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Links Free Hotmail Customize Links Windows Windows Marketplace Windows Media first direct internet banking

Address http://ppmmsg01:9080/ePerformance/default.jsp

**Torexretail** ADMINISTRATOR Week 18 : 26 August 2007 Validation Rules Log off

Standard Advanced

Rule	Schedule Plan	Action Plan	Actual Plan	Scheduler	Use Actuals
Warn on Overage					
Contract Hours Exceeded					
No Shifts					
Too Few Shifts					
Too Many Shifts					
Too Many Long Shifts					
Too Few Late Shifts					
Too Many Late Shifts					
Invalid Availability					
Invalid Task					
Max Hours Exceeded					
Shift Too Short					
Shift Too Long					
Below Contract Hours					
Employee Availability Invalid					

Finished Opt Out

If you need assistance, please contact the Service Desk on 01 438 848080

Torexretail

javascript:pagePlanRuleToggle(0, 0, false);

Local intranet

### Standard Tab window

- To select whether a rule generates a warning or an alert and on which plan, click associated symbols;



This symbol is a **warning** advising that a rule has been breached. It is advisory only.



This symbol denotes an **error** advising that a rule has been breached. The user cannot continue until the issue is resolved.



This symbol means an alert for a rule is switched on



This symbol means that the selected rules use actual times instead of contracted/scheduled times

- Selecting any of the symbols by clicking associated button at the **top** of the page, switches functionality on for all of the rules listed below it.
- To de-select, click button again.

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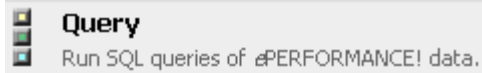
**Note.** Individual rules can be switched on and others left off. It is advisable to configure the system in this way, so the user is not overloaded with alerts.

---

Query

**INCORRECT USAGE OF THIS MODULE COULD CAUSE SERIOUS DAMAGE TO YOUR DATA.**

1. To access the Query area of the system, click



2. A screen, similar to that below, will be displayed.

The screenshot shows the Torexretail web application interface. At the top is a dark blue header with the "Torexretail" logo on the left, the user role "Administrator" and the date "Week 5 : 29 January 2007" in the center, and "Home" and "Log off" buttons on the right. Below the header is a light blue section titled "Enter SQL query here...". Inside this section is a large text area containing the SQL query "select \* from tblfileset;". To the right of the text area is a vertical scrollbar. Below the text area is a button labeled "Execute SQL....". Below the button is a table displaying the results of the query. The table has five columns: "FILESETID", "SHORTDESC", "LONGDESC", "STOREGROUP", and "STORETYPE". The table contains eight rows of data, each representing a different location. The "Torexretail" logo is also visible in the bottom right corner of the page.

FILESETID	SHORTDESC	LONGDESC	STOREGROUP	STORETYPE
3	1229	Birmingham	0	
4	1002	Coventry	0	
5	1003	Wolverhampton	0	
7	1004	Walsall	0	
8	1005	Worcester	0	
9	1006	Leicester	0	
10	1007	Derby	0	
11	1008	Nottingham	0	

#### Enter SQL Query window

3. Enter any valid SQL statements in the top half of the screen and click **Execute SQL.....**
4. The results will be displayed in the bottom half of the screen.





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