Oracle® Retail Workforce Management

User Guide

Release 1.62

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Oracle® Retail Workforce Management User Guide, Release 1.62

Primary Author: Sean Hamill

Contributors: Matt Preston, Tracy Gunston

Value-Added Reseller (VAR) Language

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- Did you understand the context of the procedures?
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- Do you need different information or graphics? If so, where, and in what format?
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Preface

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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

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

https://support.oracle.com

When contacting Customer Support, please provide the following:

- 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 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
```

1

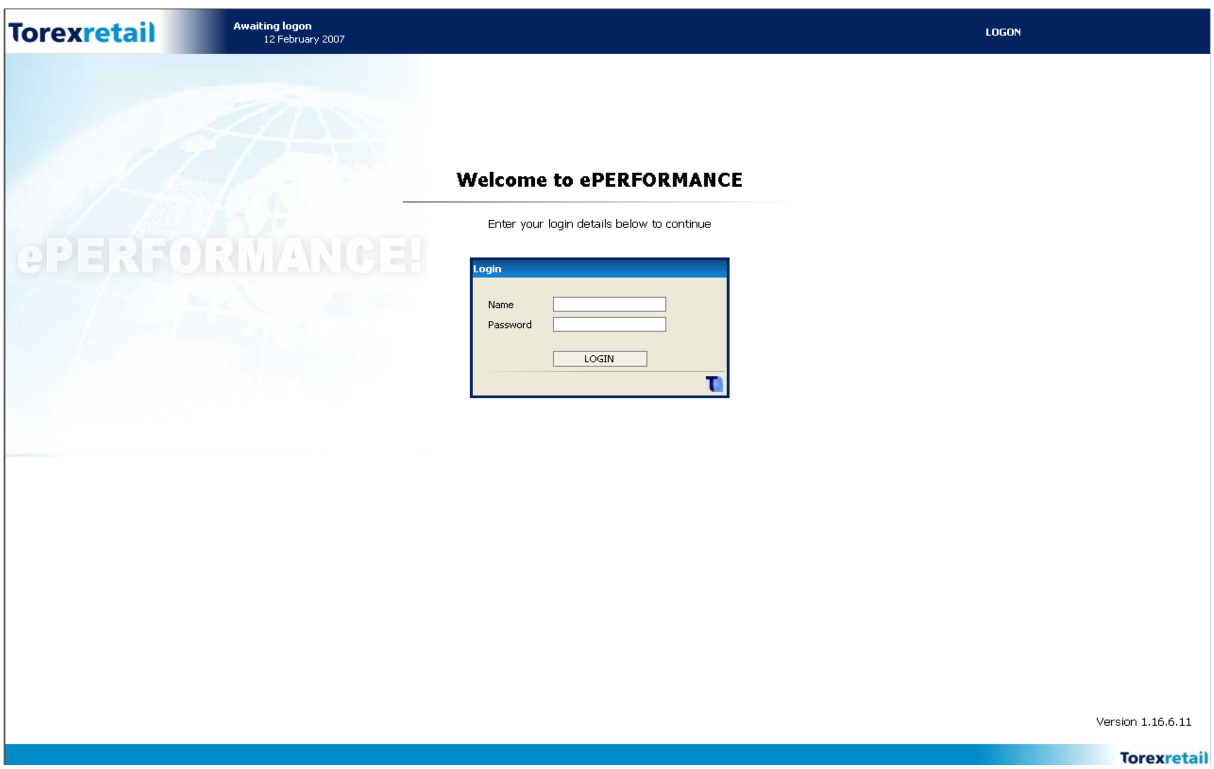
Introduction

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.



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.

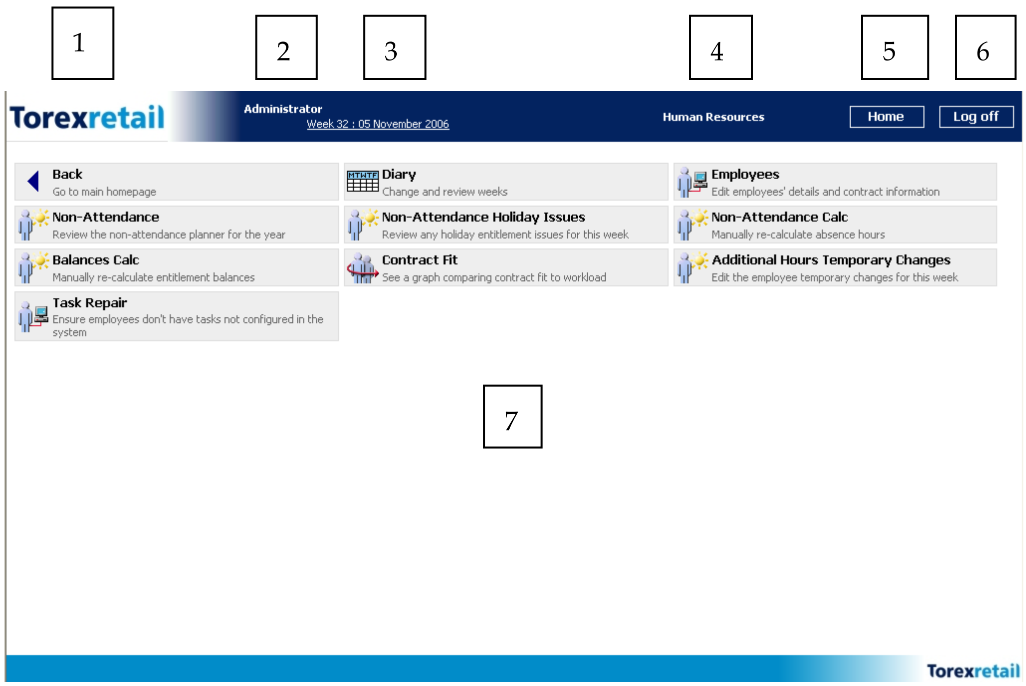
Log Off

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.

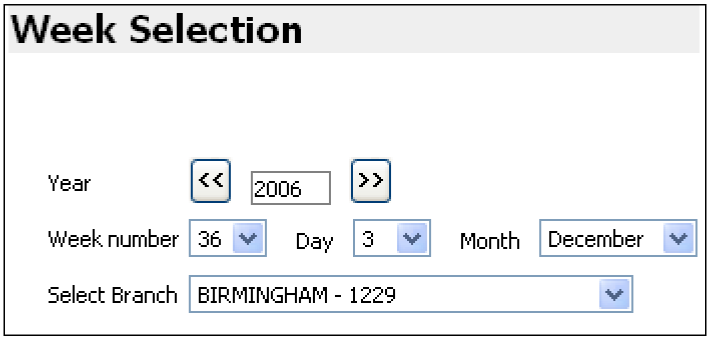


Administrator window

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.



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.

2

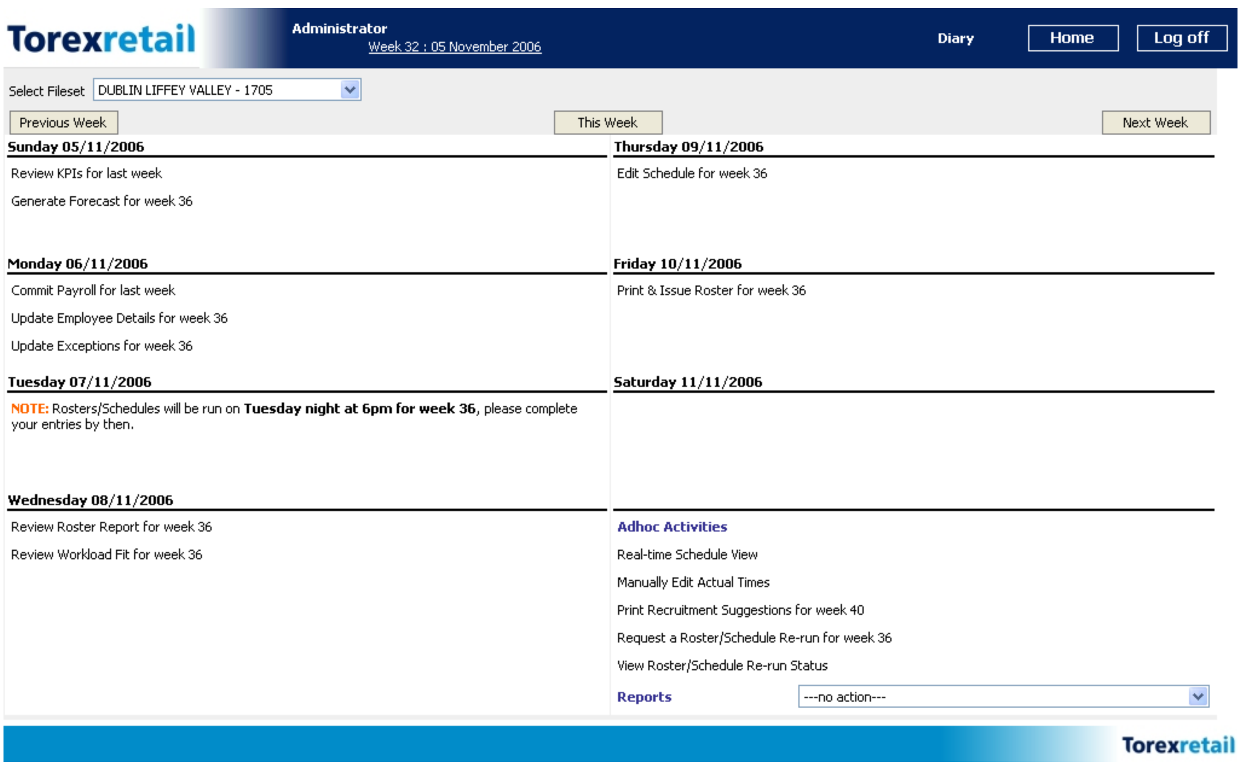
Diary

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.



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.

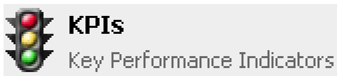
3. Beneath that, you have the option to select the **Previous Week**, **This Week,** or **Next Week**. Clicking these buttons will cycle through the relevant weeks and allow you to view the Diary for the period. Clicking **This Week** will always return the screen to the current weeks view.

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.

3

KPIs

1. To view the KPIs module, click **KPIs**.



KPI button

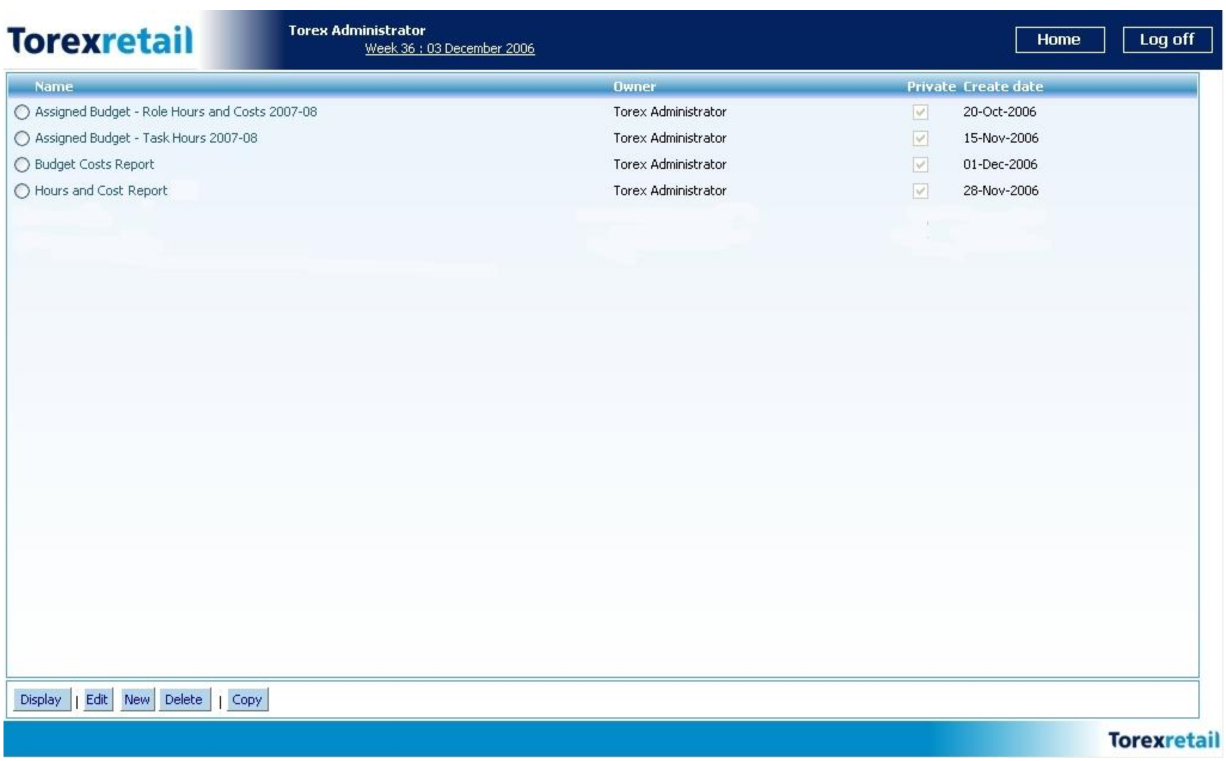
Report Library

1. To access the **Report Library**, click KPIs.
2. Then click **Report Library**.

Report Library button

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

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



Reports window

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.

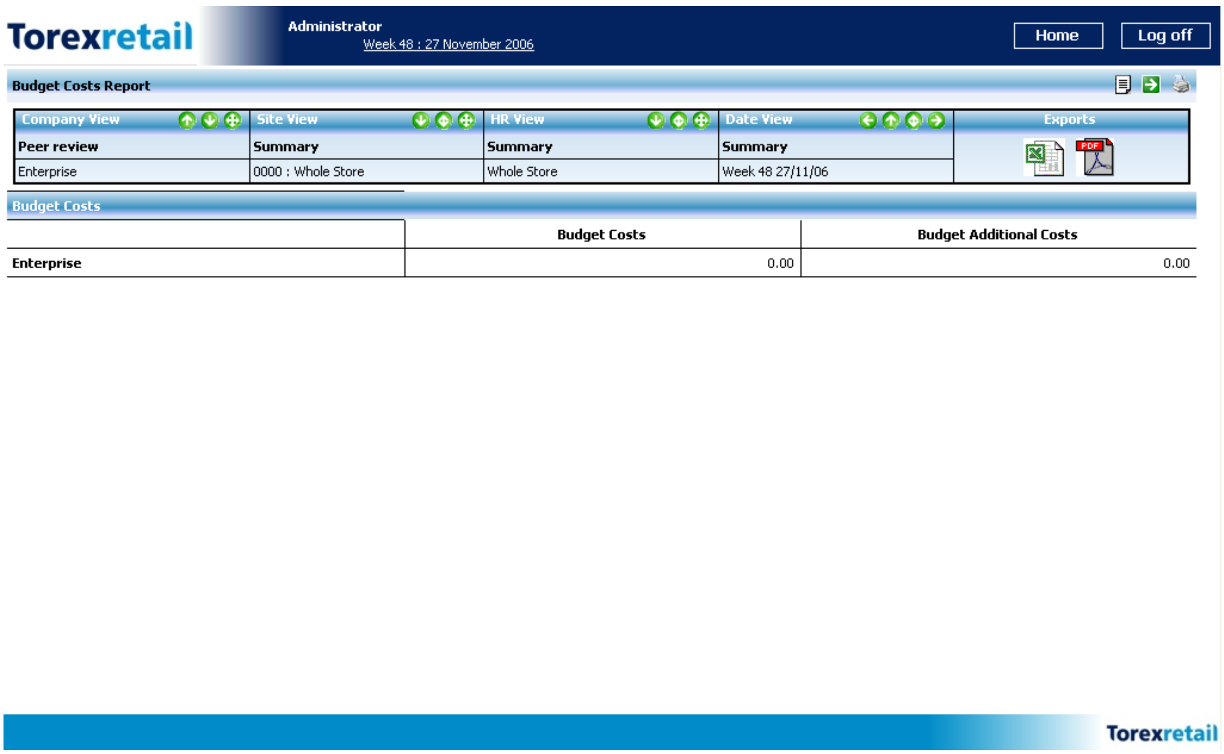
Display a Report

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:



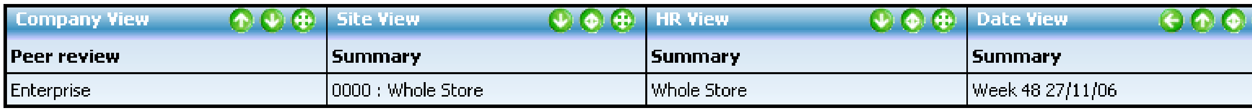
Open Report window

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



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,

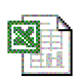
Area 1 contains:

- 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.

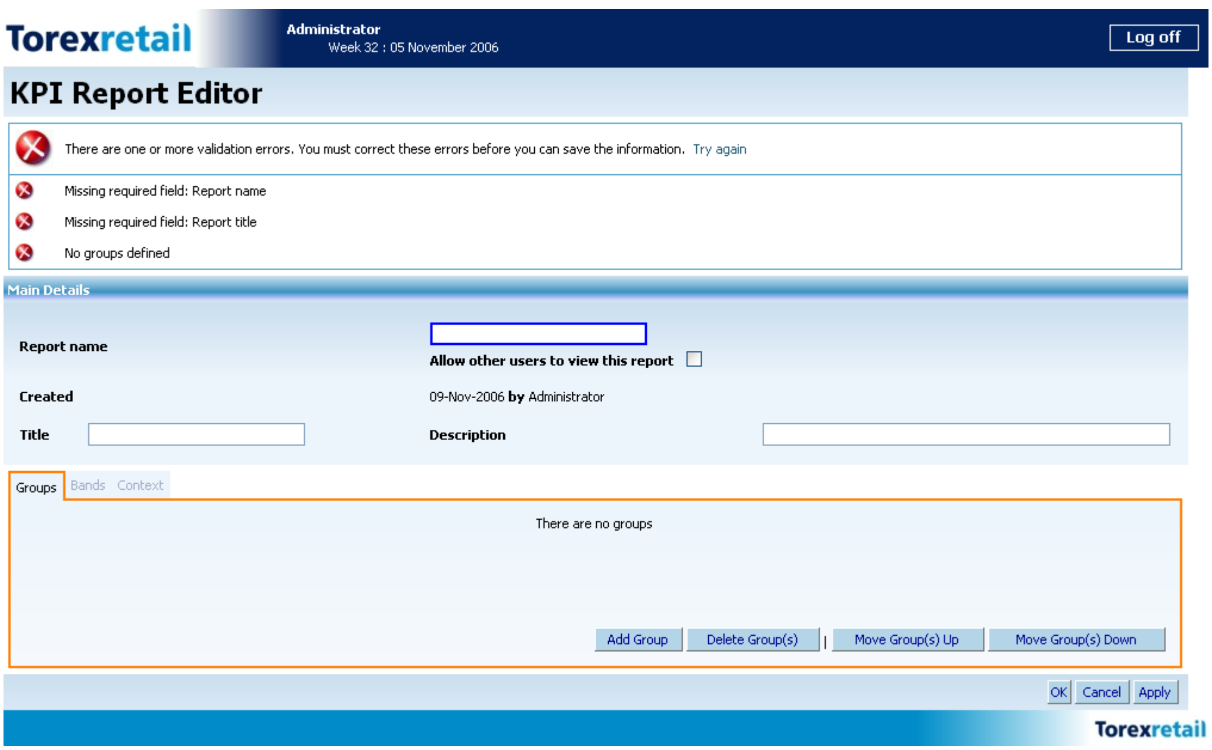
Note: The **Autorun** option cannot be manually run by the user. The system can be configured to export the required information at a pre-defined time. Speak to your Torex Retail Account Manager for further information regarding the implementation of this option.

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:



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

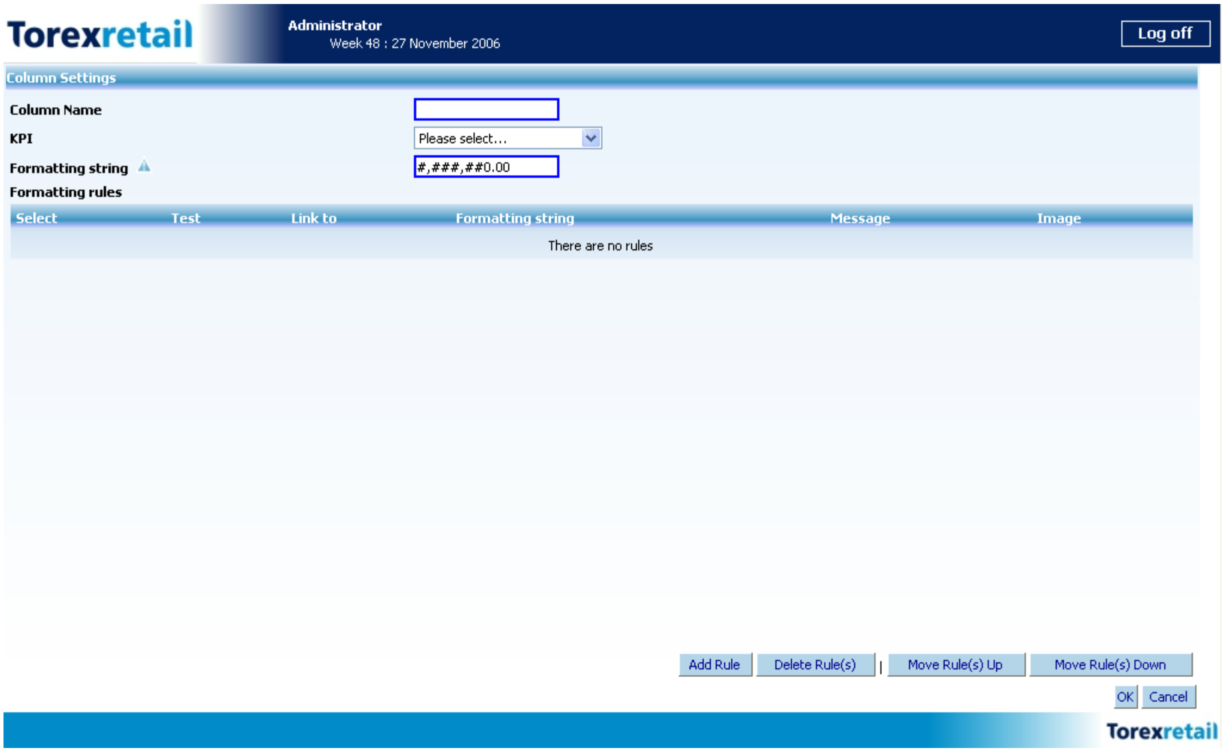
1. To add a Group to the report, click **Add Group** at the bottom of the screen.
2. The screen will change and information, similar to that below, will be displayed:

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:



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.

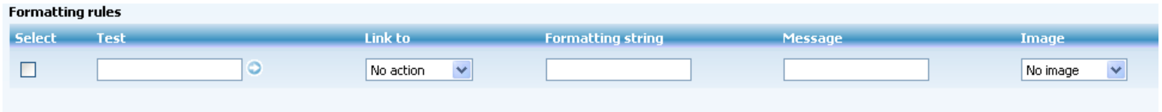
   The values which can be entered are:

#	-	Is for 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%**.

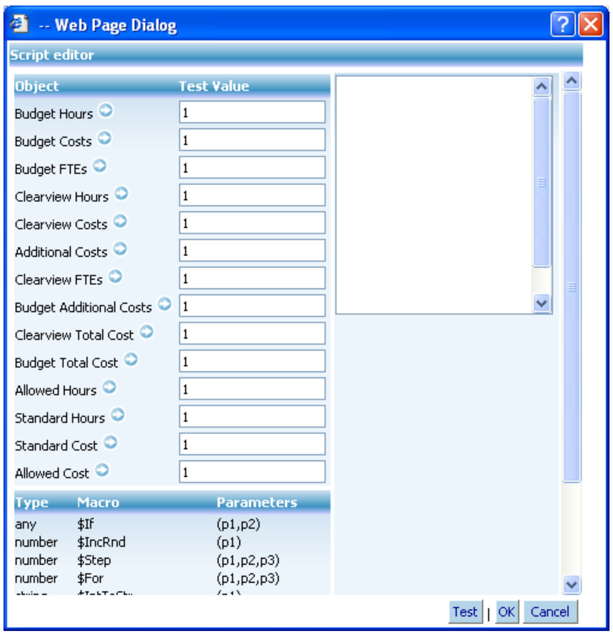
Add a Rule

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



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:



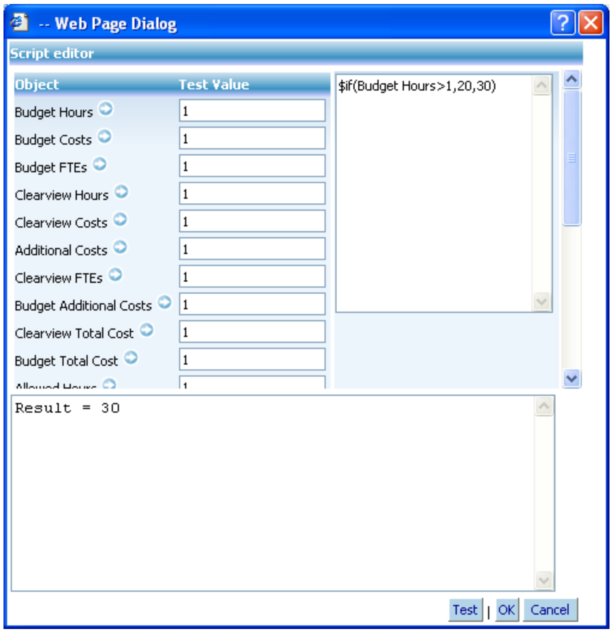
Add a Rule window

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

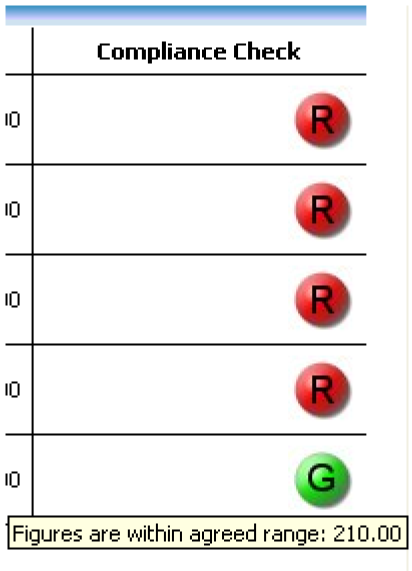
7. Once an appropriate Macro has been written, click **OK** to return to the previous screen.
8. The Macro text will be displayed in the **Test** field.
9. The **Link to** list should always be set to **No action**.
10. Changing the information in the **Formatting String** field, will alter the way the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

12. 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

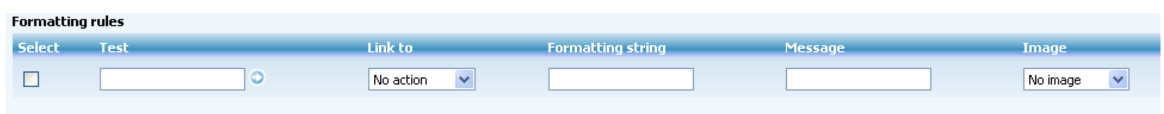
    You could assign a Green image to this statement, to quickly show to the user that the generated budget figures are correct. Alternatively you could then set up a further rule with a red image with the following test

    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

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

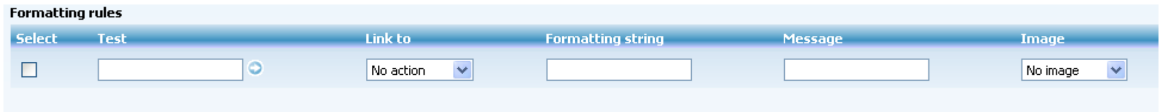


Delete a Rule window

2. Click **Delete Rule(s)** at the bottom of the screen.
3. 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.



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

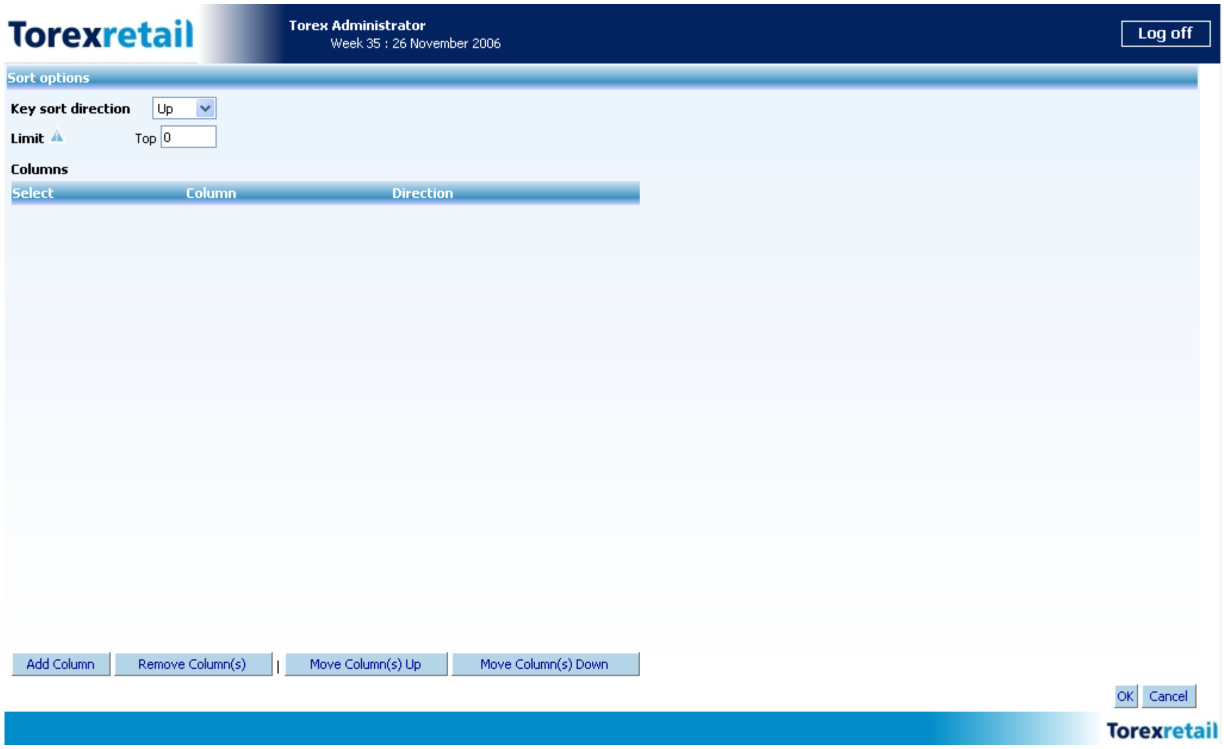
1. To edit an existing column, click appropriate column name and click Edit.
2. This will then display the **Add** column screen, but the information will be populated. Change or add any applicable data and then click **OK**.

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 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:



Sorted by Context window

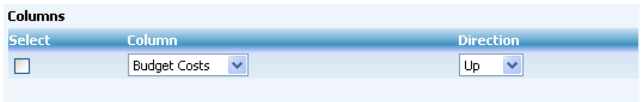
4. The **Key Sort Direction** drop down allows you to either sort the values in the data column up or down (alphabetically/numerically).
5. Click **Key sort direction** list and select the way in which you would like the data to be sorted, **Up** or **Down**.
6. For example if you had the following in 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.

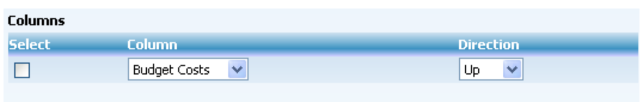


Add Column window

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.

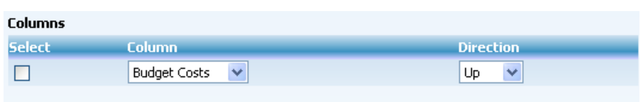


Remove Column window

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.



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.

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

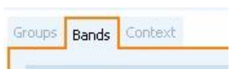
1. To move a group, so that it is displayed in a different place in the report, tick the box next to the **Name** field.

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.



Bands button

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

Add a Band window

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

Add a Filter

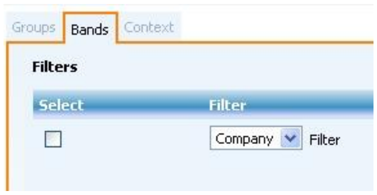
1. To add a filter to the Band, click **Add filter**.

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

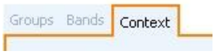
1. To move a Band in the list, click in the tick box, next to the **Name** field.

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**.

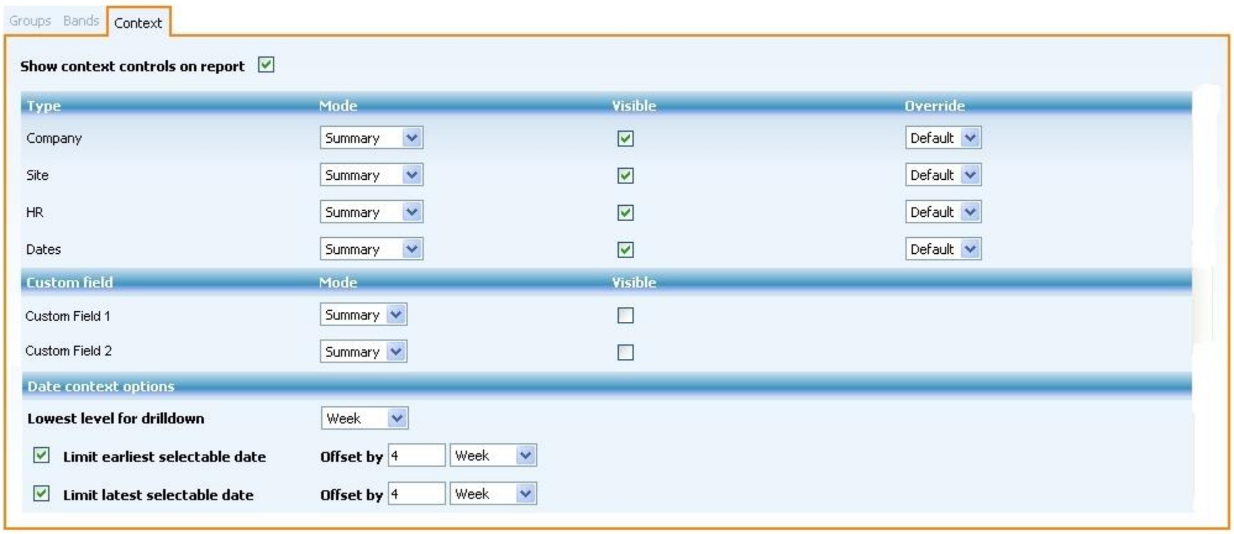
Context

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:



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.

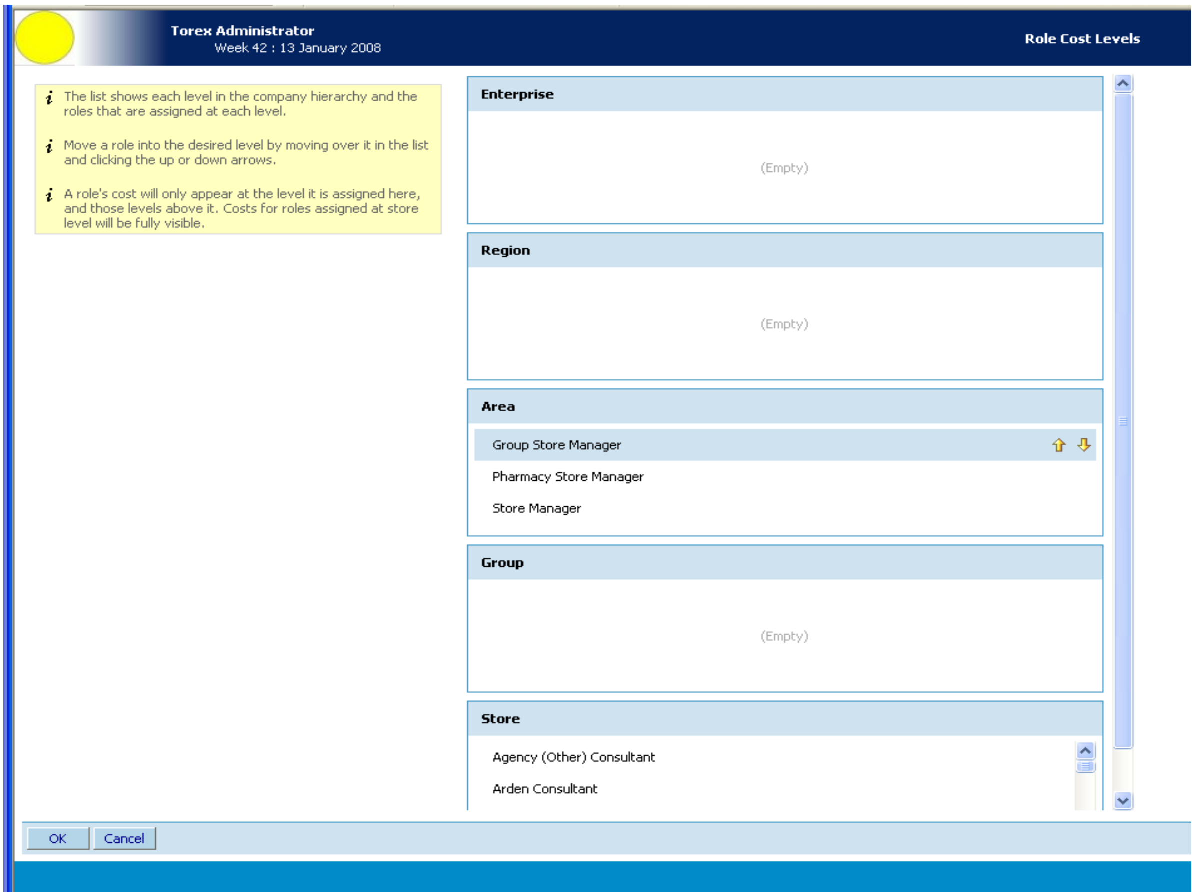
Viewing information only at specified levels

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.

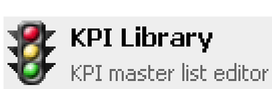
1. Click in the radio button to the left hand side of the report, you want to copy. It will become highlighted.
2. Click **Copy**, at the bottom of the screen.
3. A field will appear at the bottom of the screen, which displays the text **Copy of <Report Name>**. You can click in this box, edit the text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

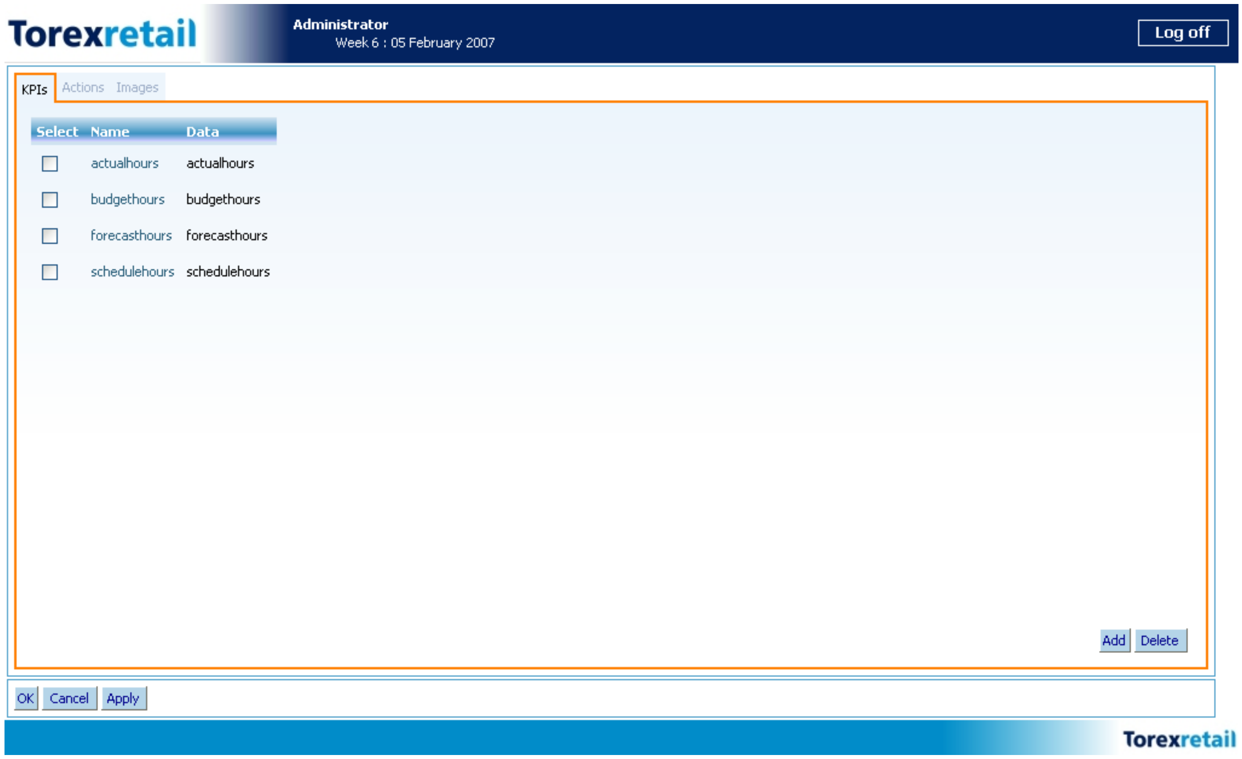
KPI Library

To view the KPI Library, click KPI Library.



KPI Library button

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

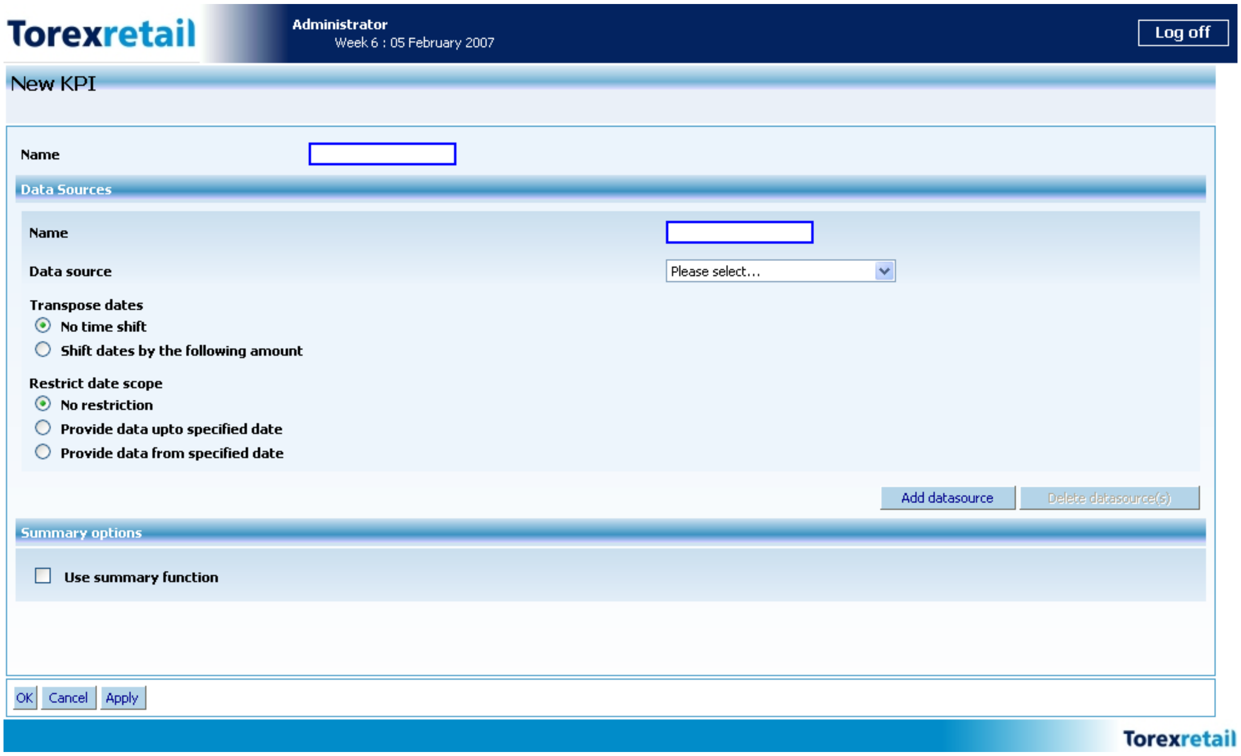


KPIs window

KPIs Tab

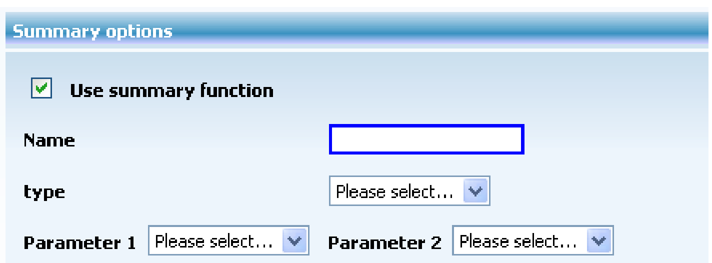
Add a KPI

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



New KPI 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:



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

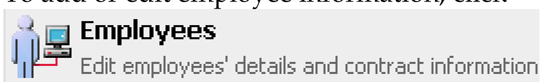
2. See the **Using a Report** section on Page 8, for further information on navigating the report.

Human Resources

1. To view the Human Resources information, click 

.

Employees

1. To add or edit employee information, click


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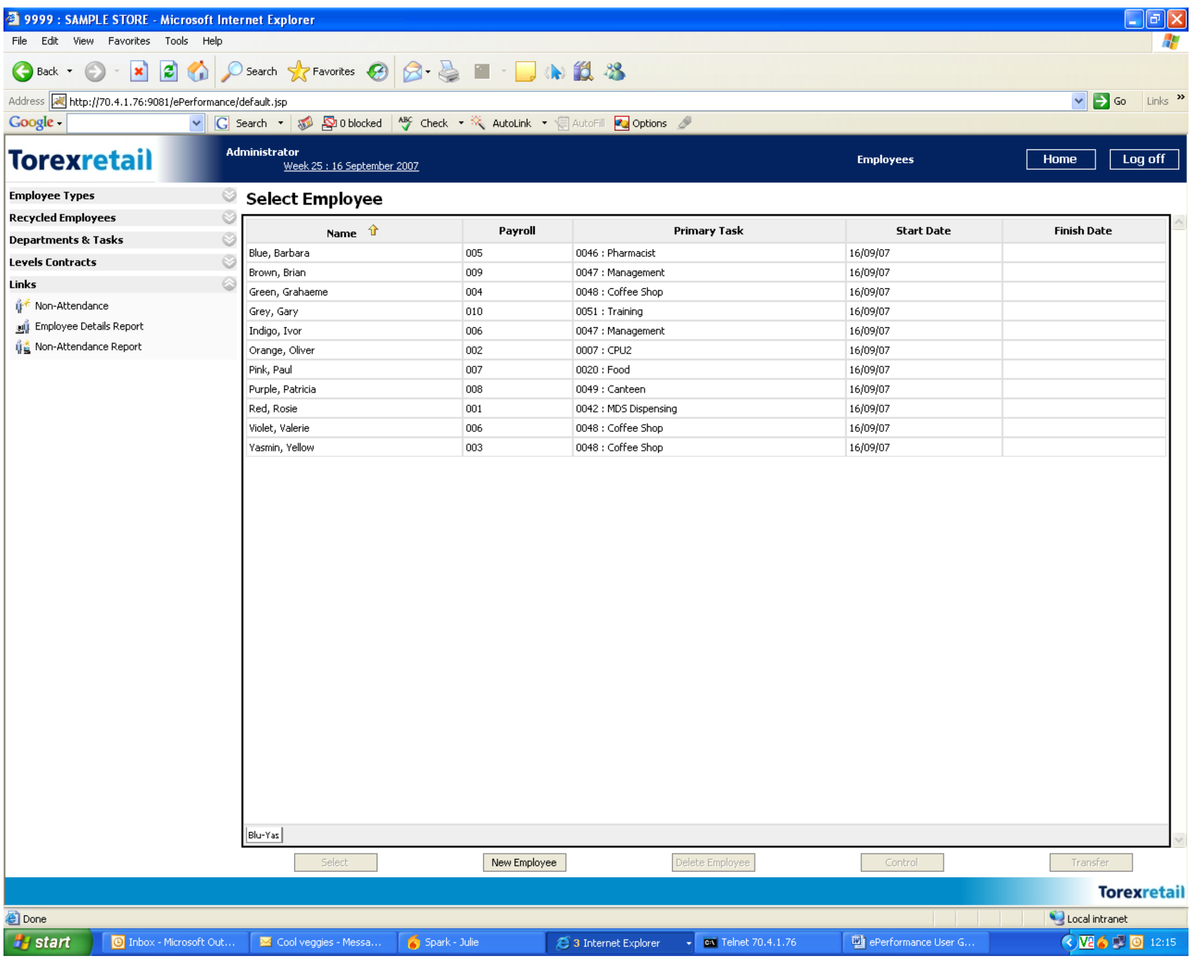
2. A screen, similar to the one below, will be displayed:

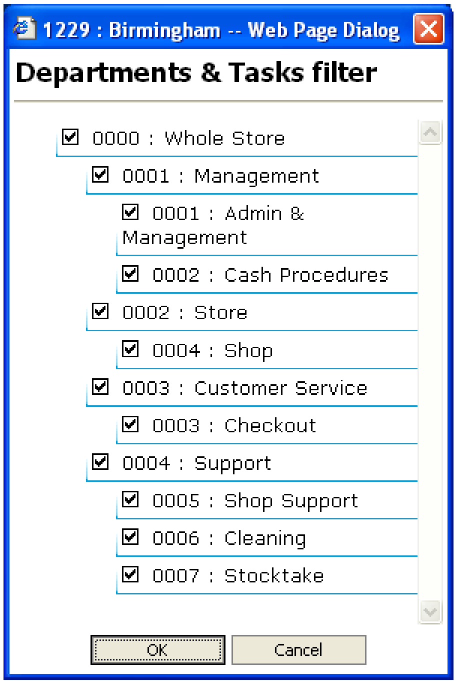


Select Employees window

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:

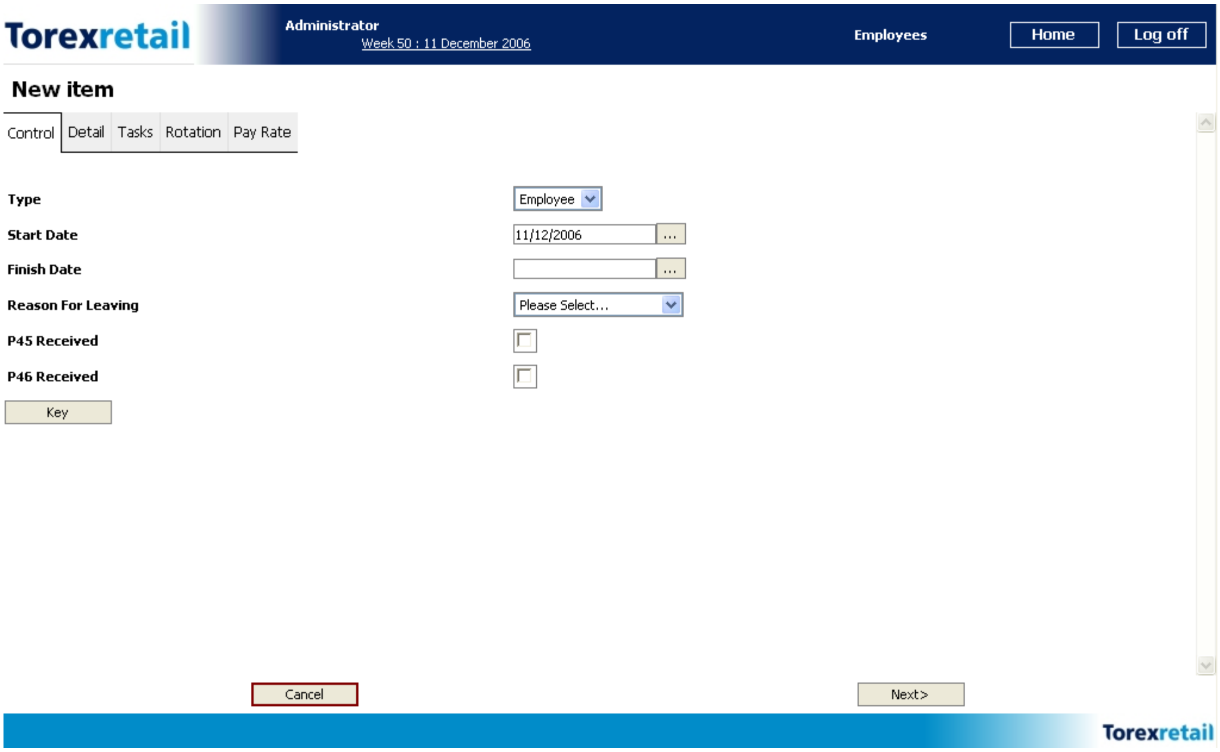


Departments & Task Filter window

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.

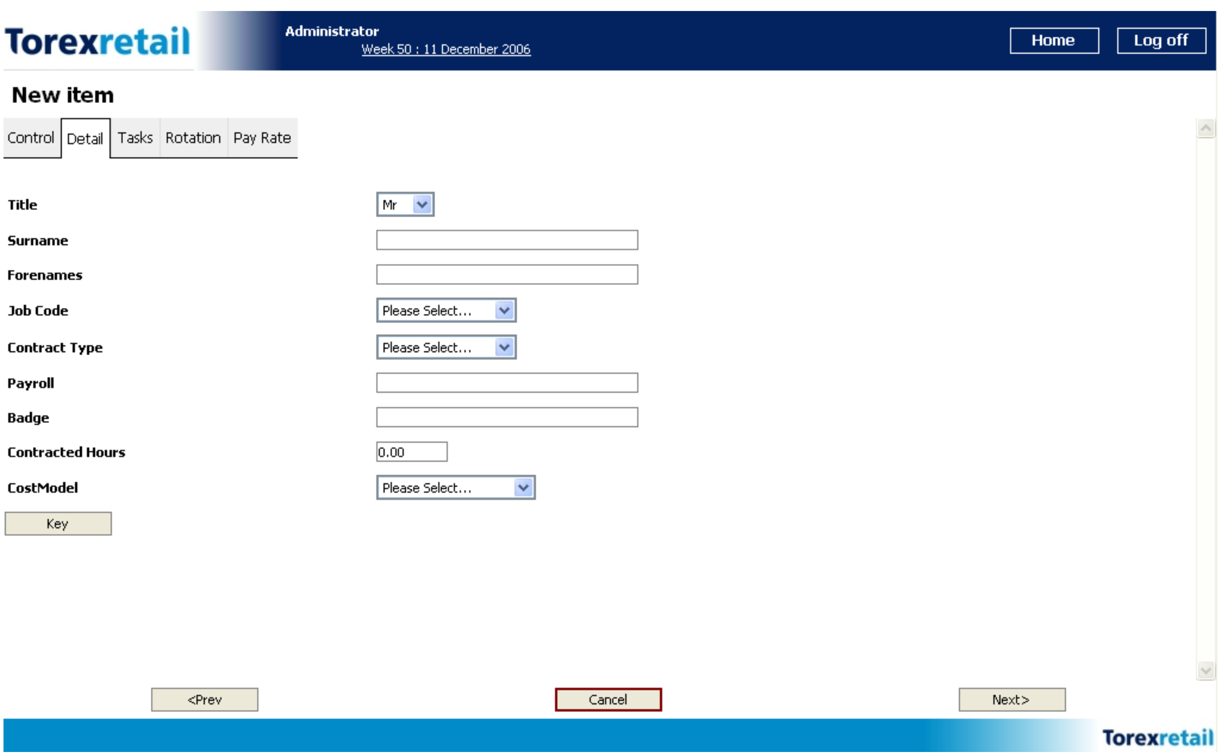
Adding a New Employee

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:



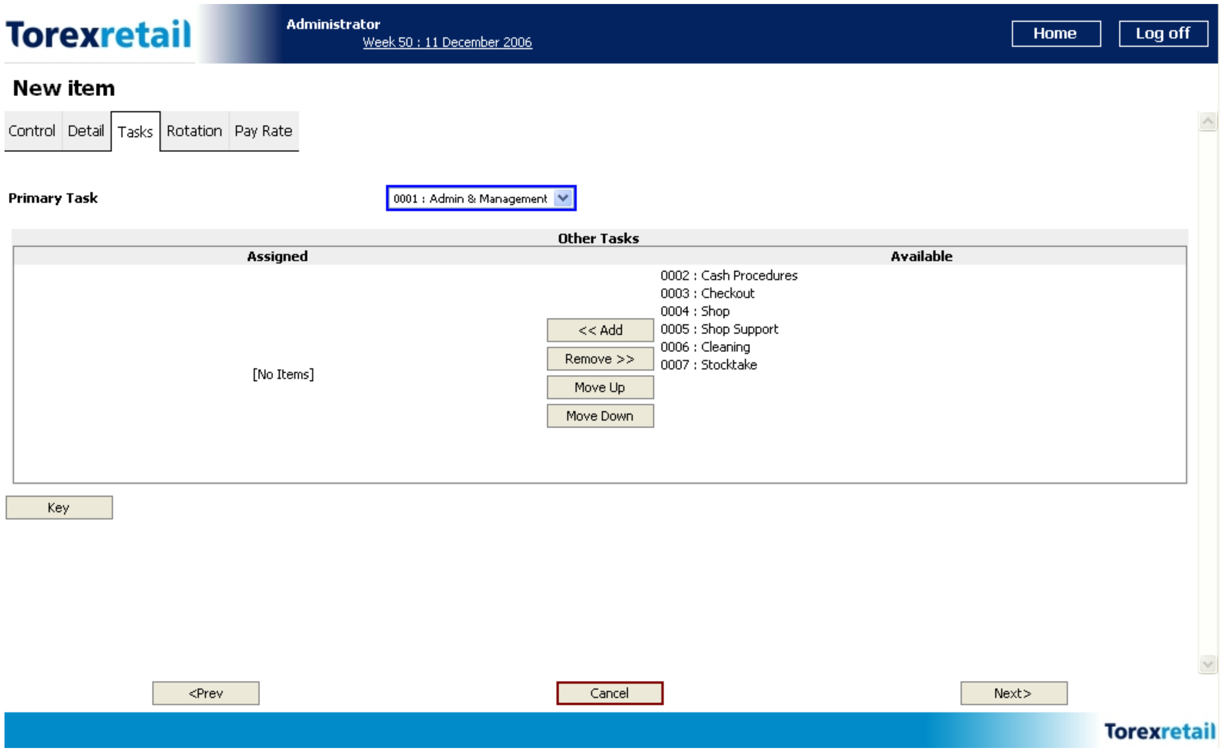
New Item Control window

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**.



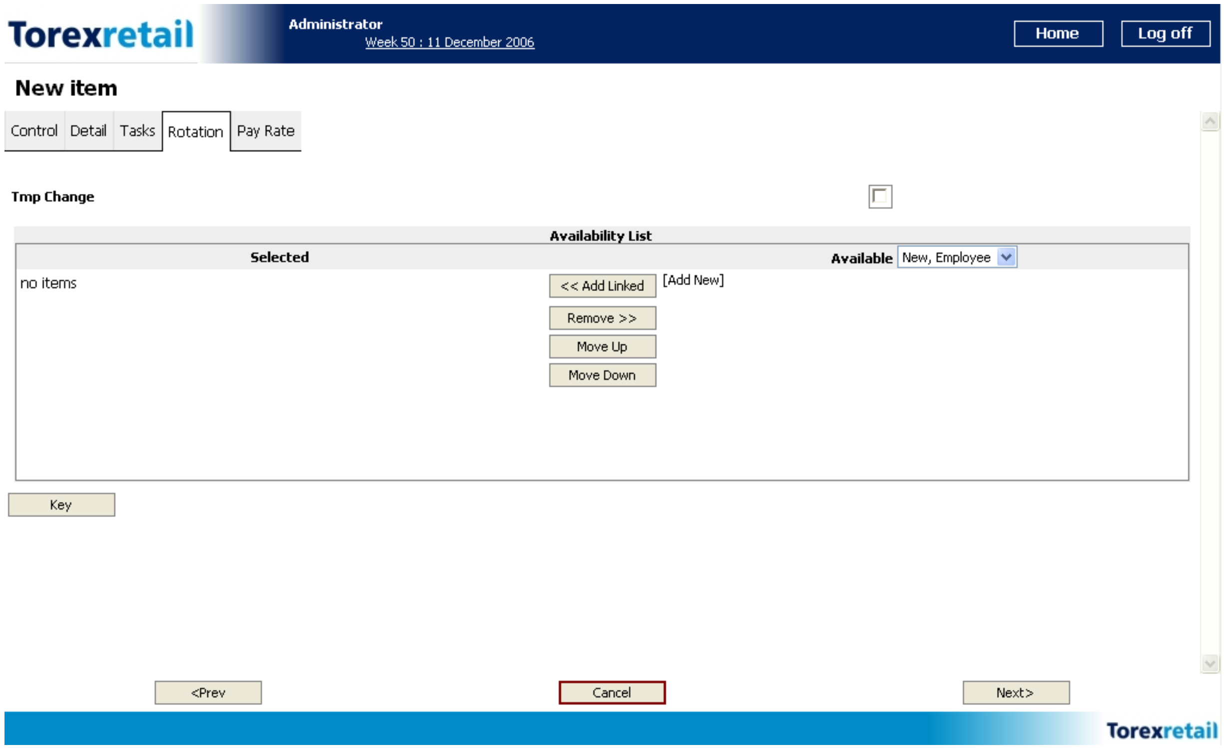
New Item Detail window

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



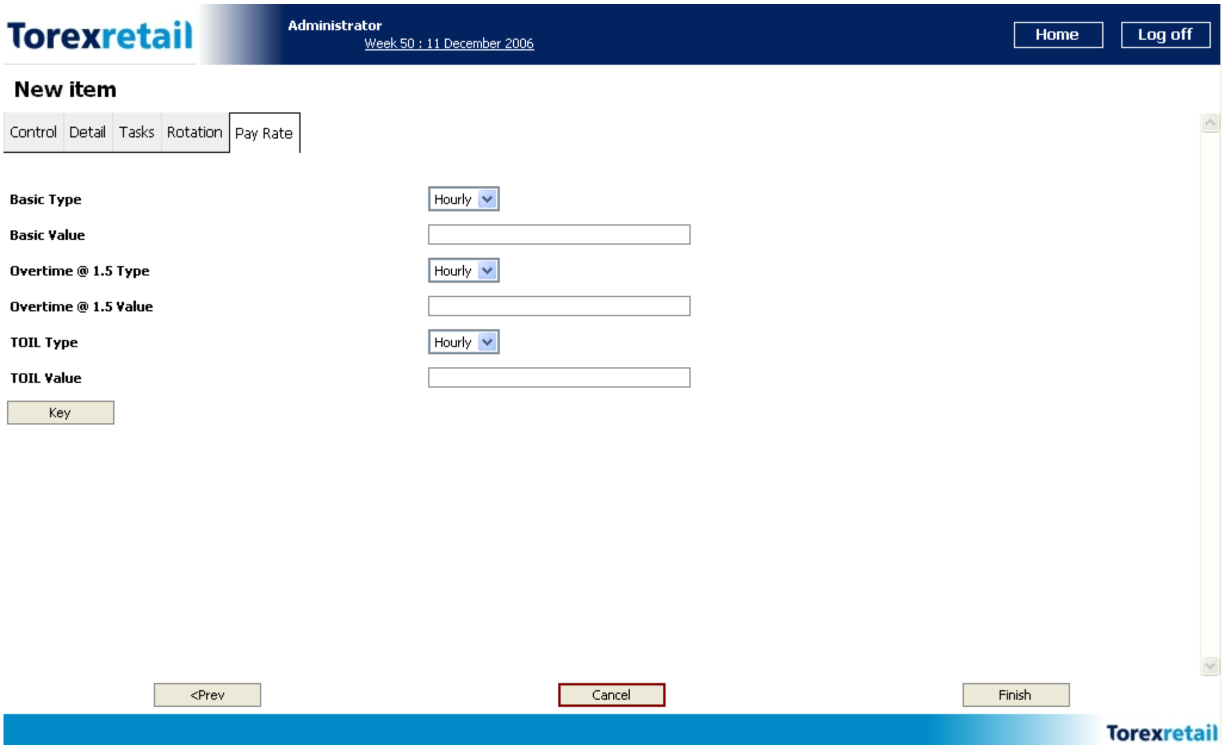
New Item Tasks window

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



New Item Rotation window

6. Select the relevant shift for the employee, by selecting it on the eight 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**.

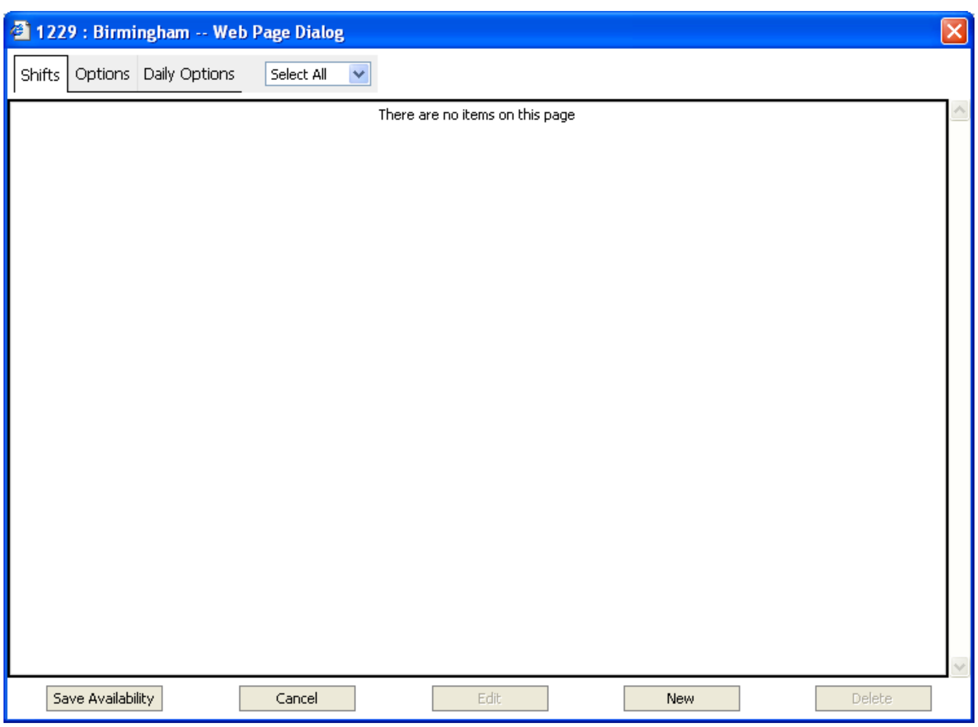


New Item Pay Rate window

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

Shifts Tab

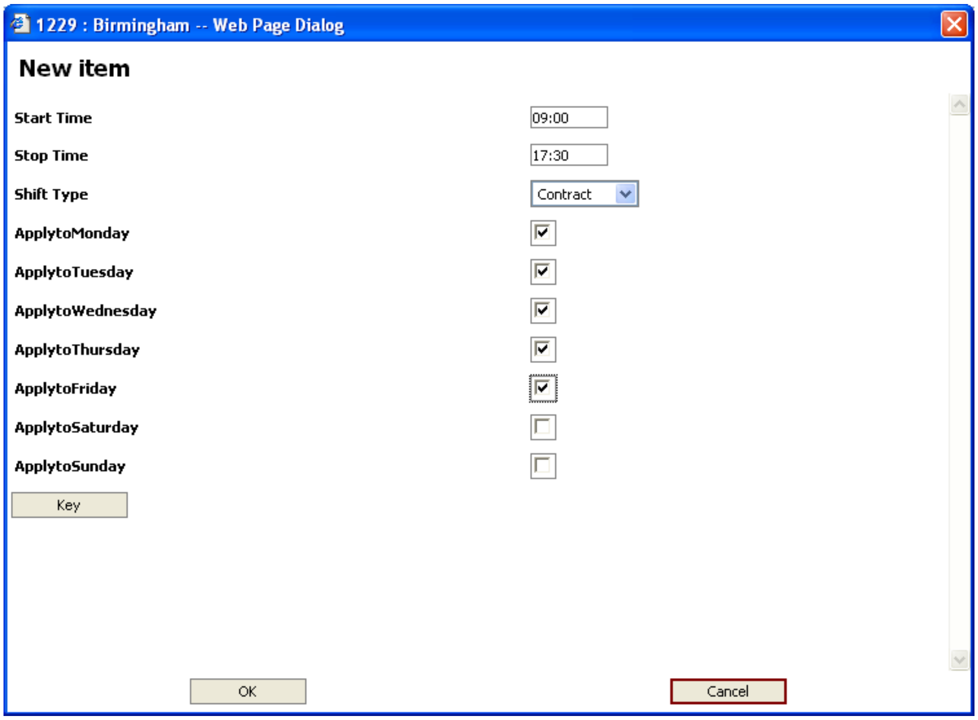
This window allows you to add different shifts, which can then be assigned to an employee.



Shifts window

Create a New Shift

1. Click **New**.



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

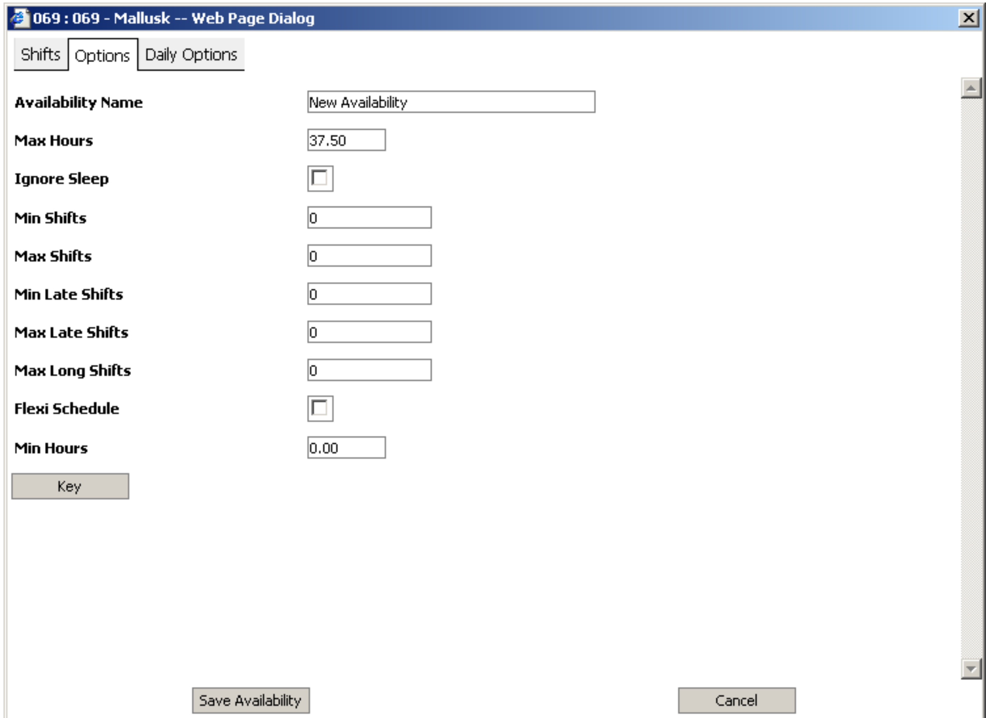
1. Select the relevant day in the list and click **Edit**.
2. Make any applicable changes and click **OK** to save and confirm or **Cancel** to disregard.

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

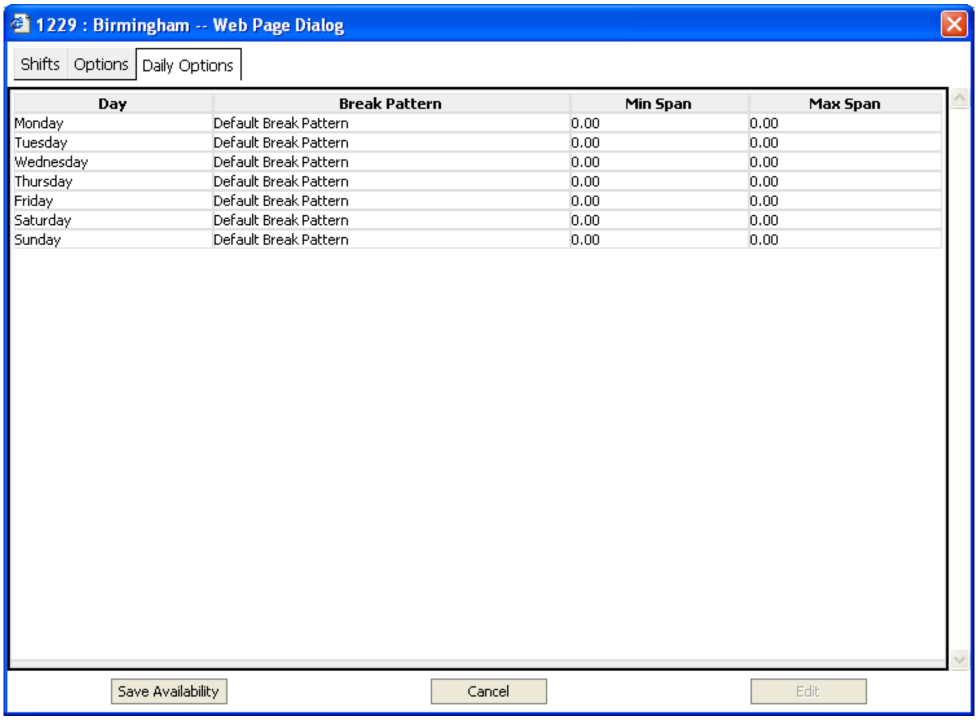
The Options tab allows you to name the shift and set options pertinent to the overall pattern. You can tell the system to ignore the minimum rest period rules for this availability pattern by ticking the **Ignore Sleep** tick box, which will allow the scheduling engine to break rules, including the European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



Options window

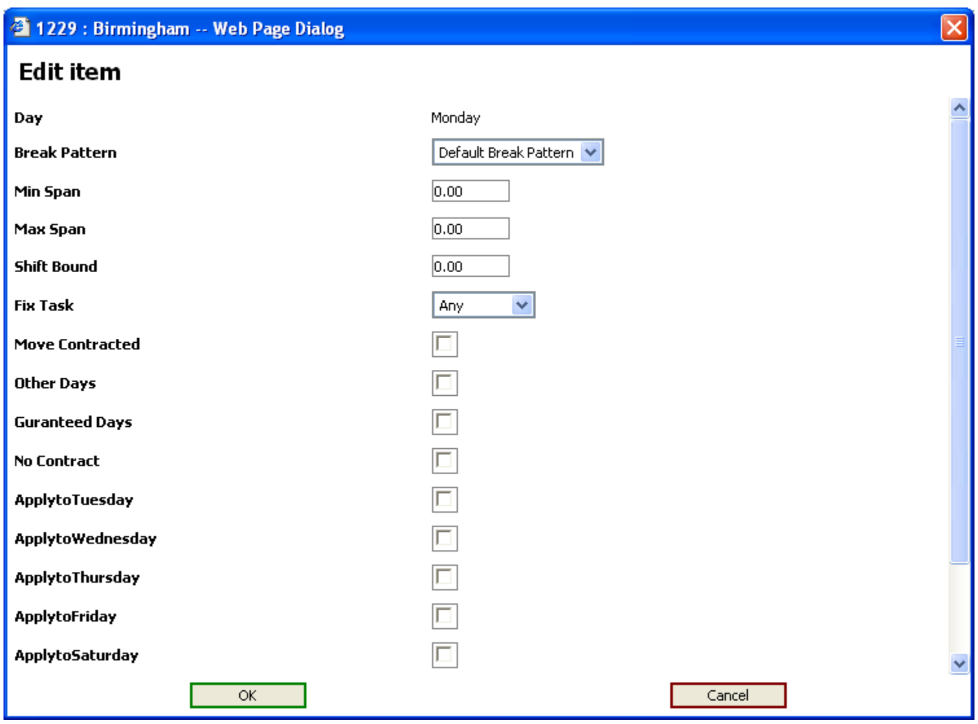
Daily Options

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



Daily Options window

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



Edit Item window

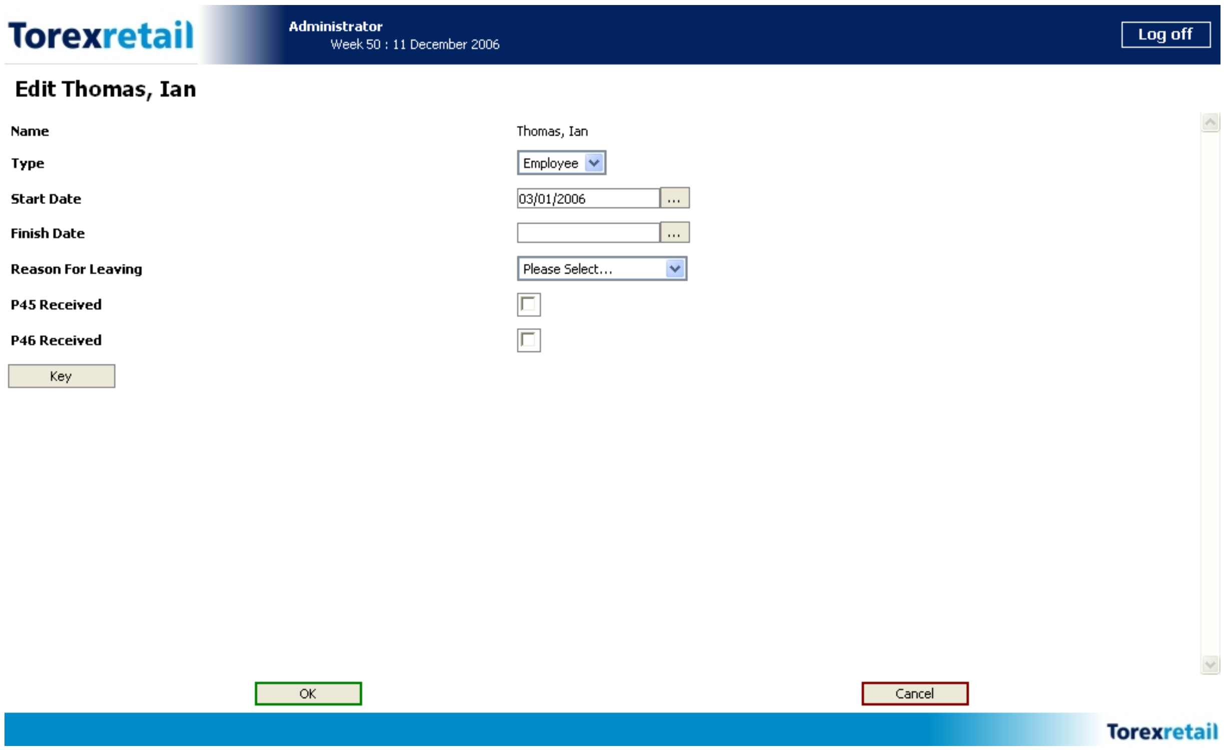
2. Make the relevant changes and click **OK** to save and confirm or **Cancel** to disregard.

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:

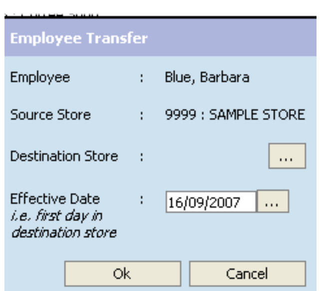


Edit employee window

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

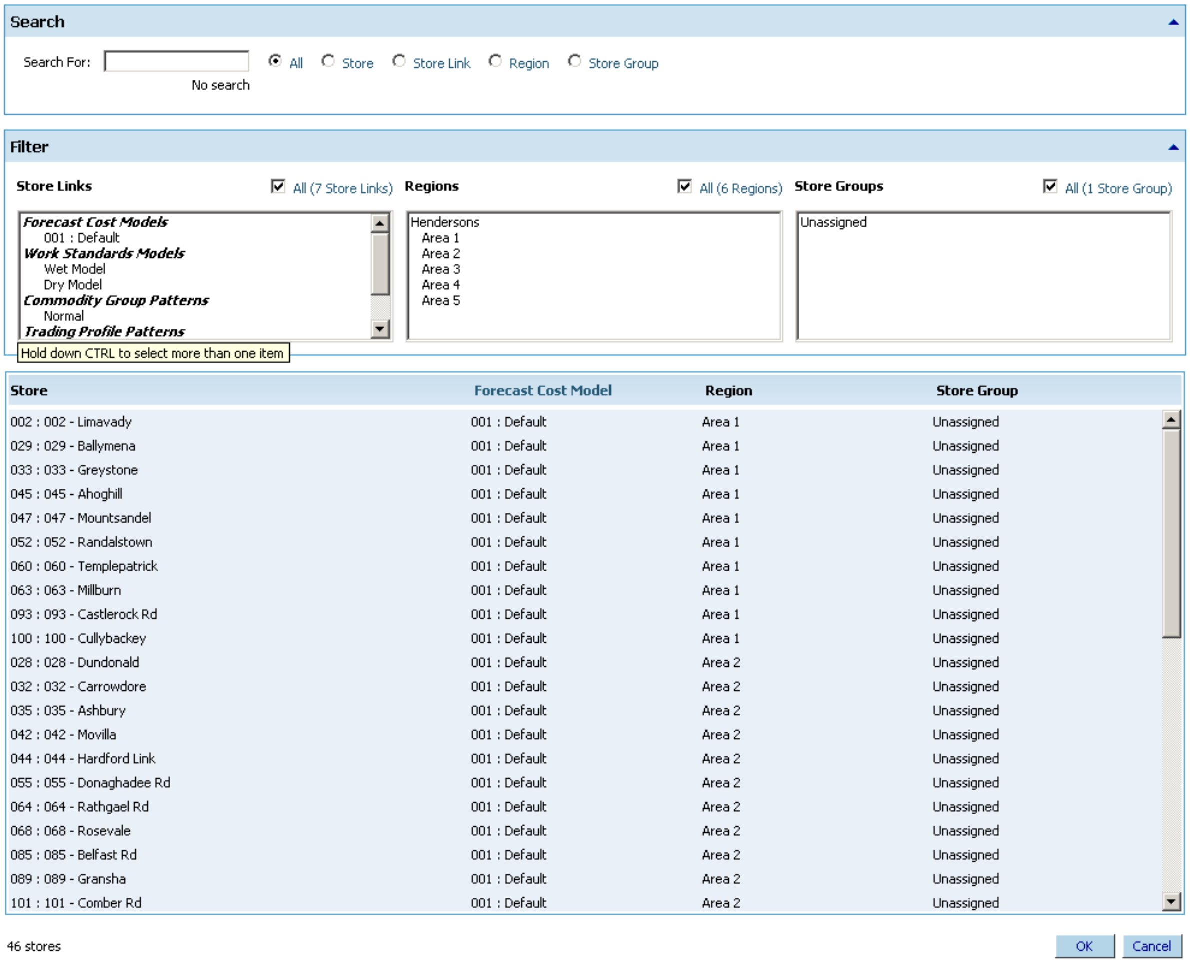
Transferring an employee

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 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 for Store window

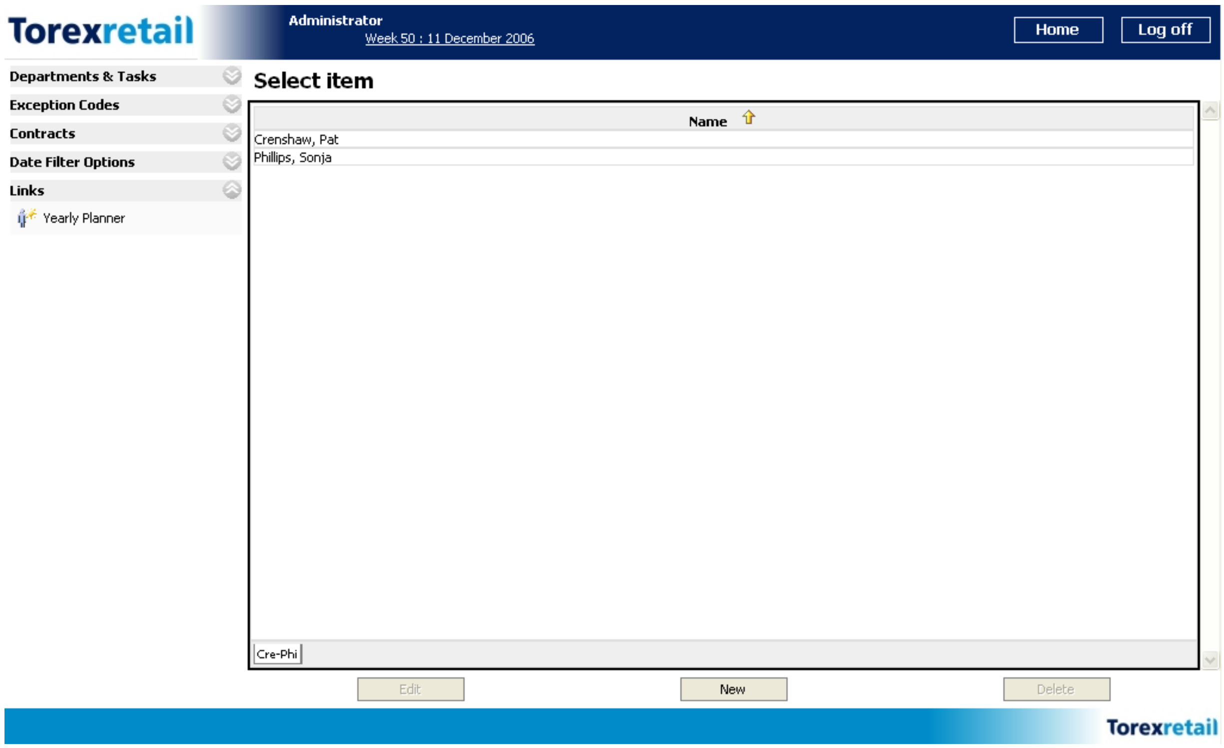
You can search for the store you want to move the employee to by using the **Search For** box, or alternatively you can refine the list by using the central **Regions** list. When you have found the store you are looking for, click on it to highlight it, and then click **OK**. You will be returned to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

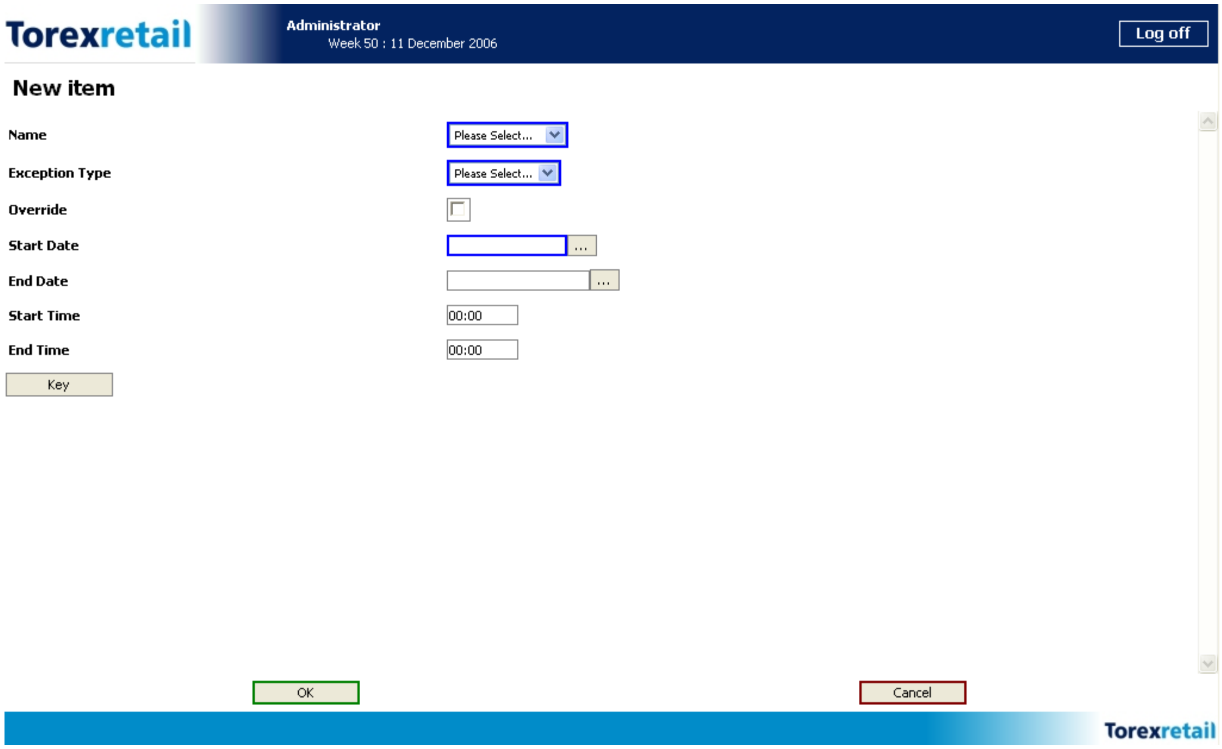


Select Item window

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 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.

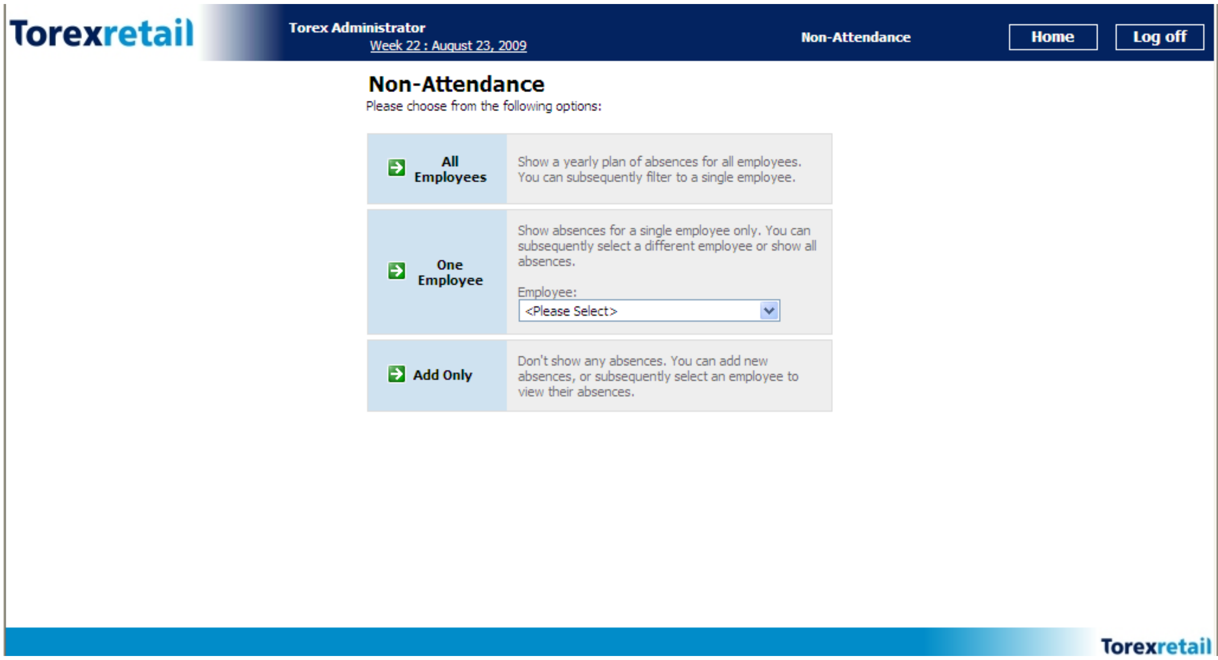
Non-Attendance Report

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

Non-Attendance

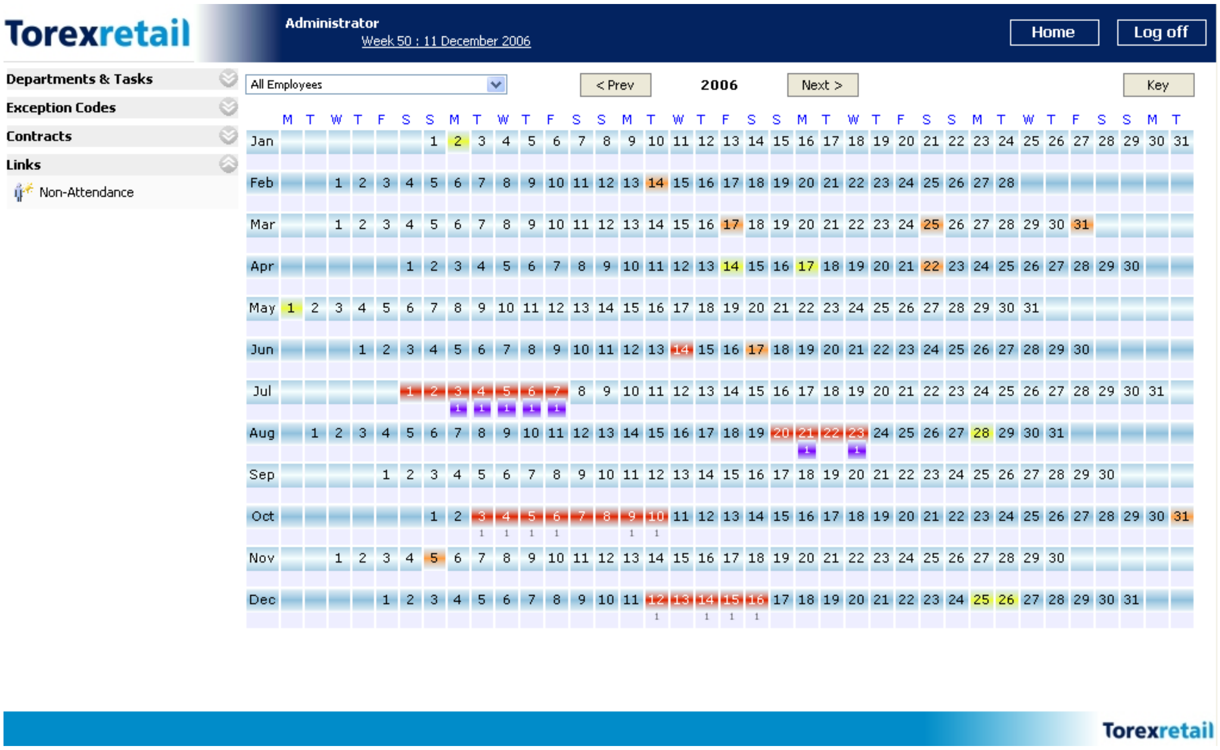
1. To view the Non-Attendance screen, click 

.
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.



All Employees window

6. 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

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

Yearly Planner Legend window

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

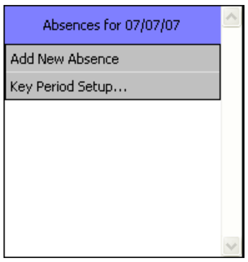
Adding an Absence

There are 2 ways to add a new absence:

- Directly to the calendar
- Non-Attendance Link

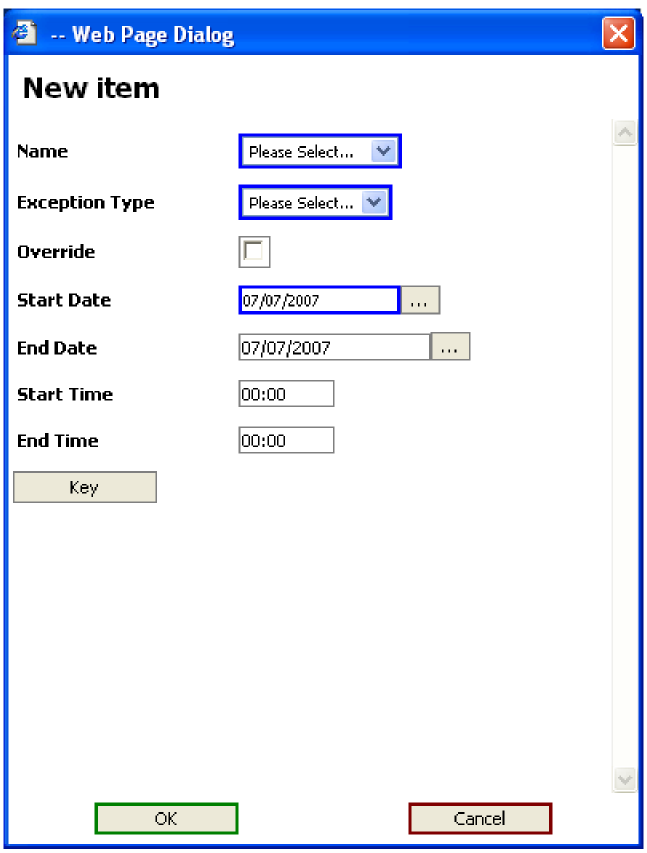
Direct to the Calendar

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:

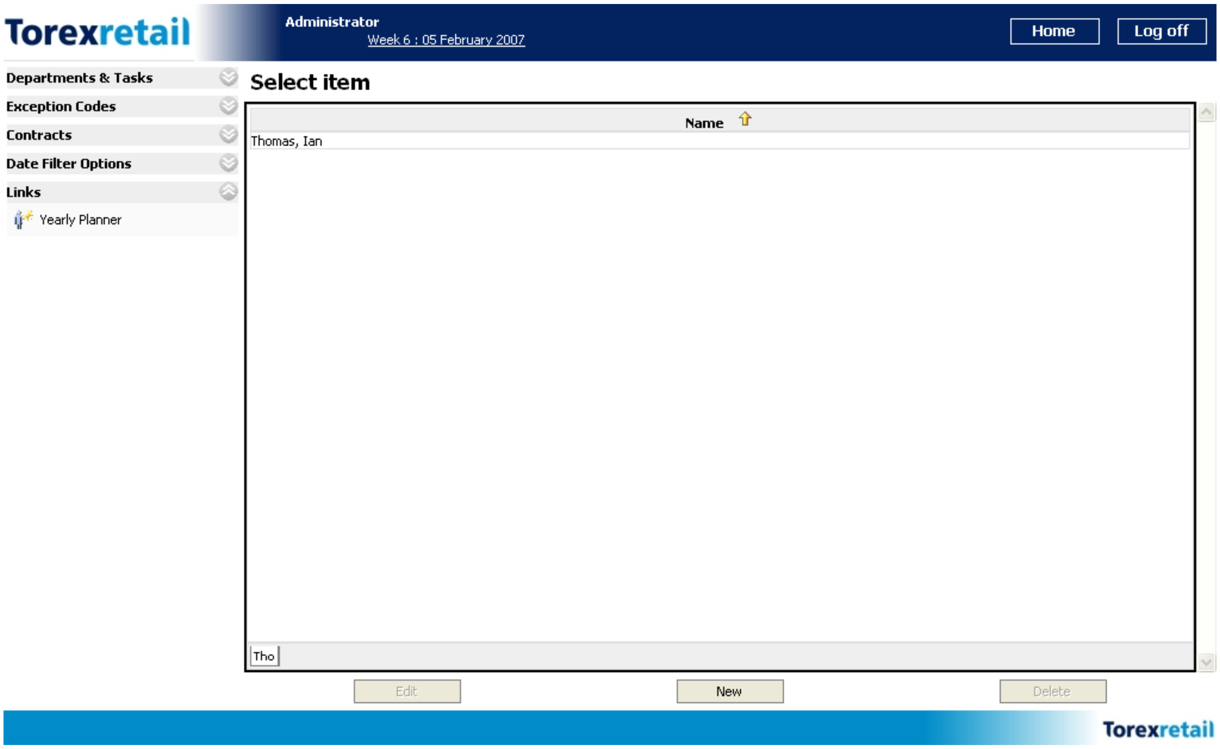


New Item window

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:



Select Item window

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

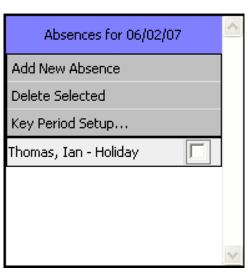
Editing an Absence

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:



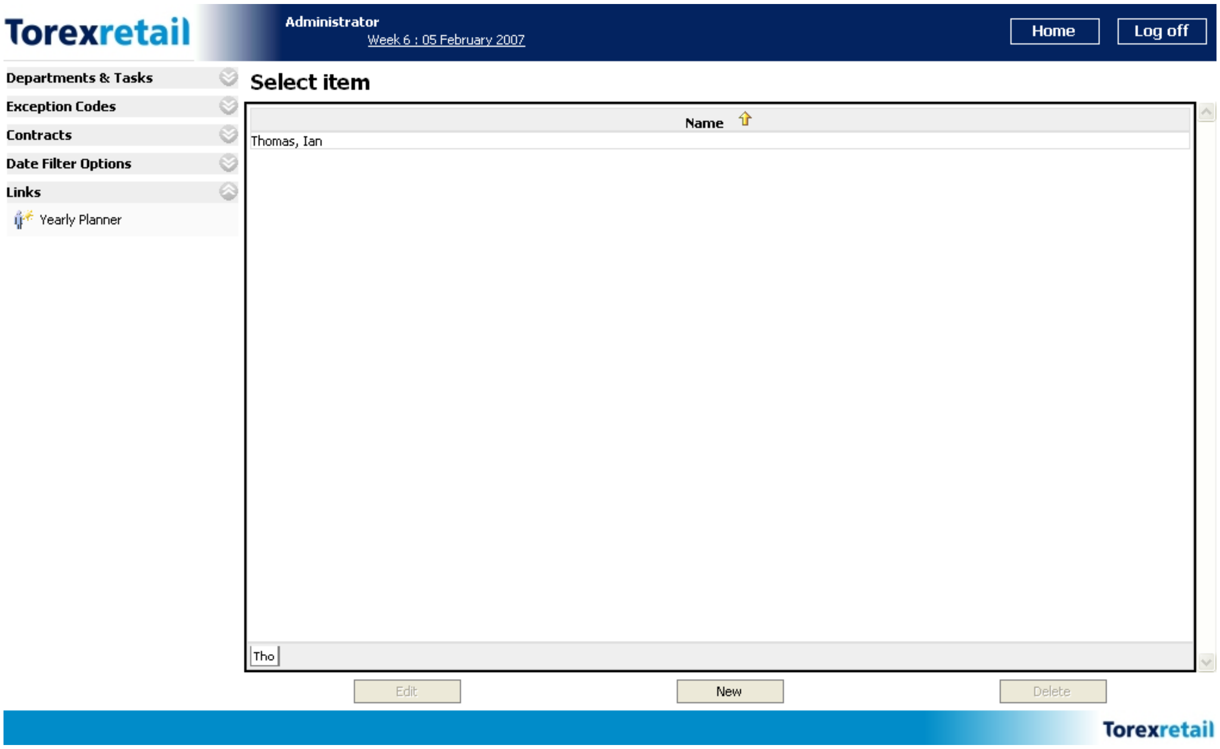
Absence window

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:



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.

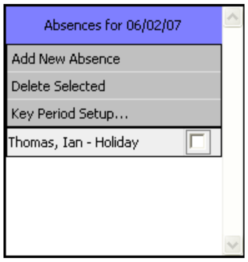
Deleting an Absence

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:

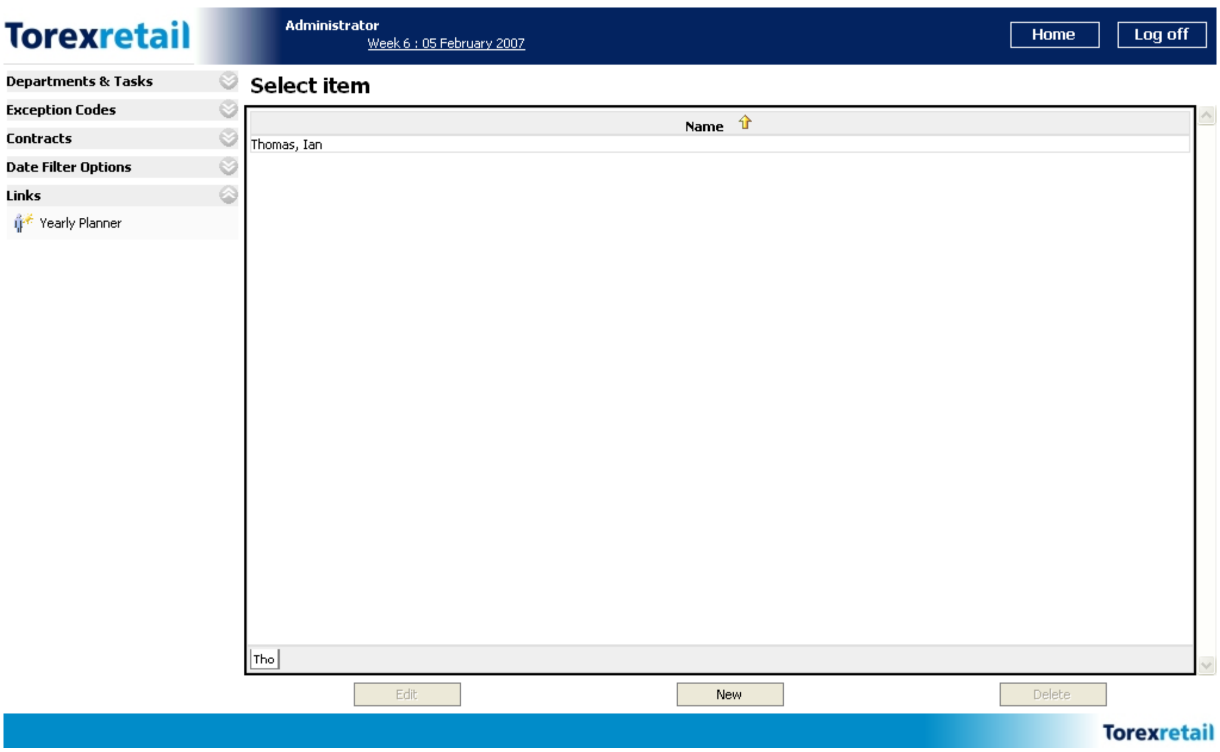


Absences window

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:

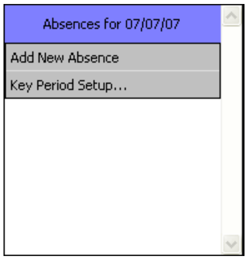


Select Item window

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.

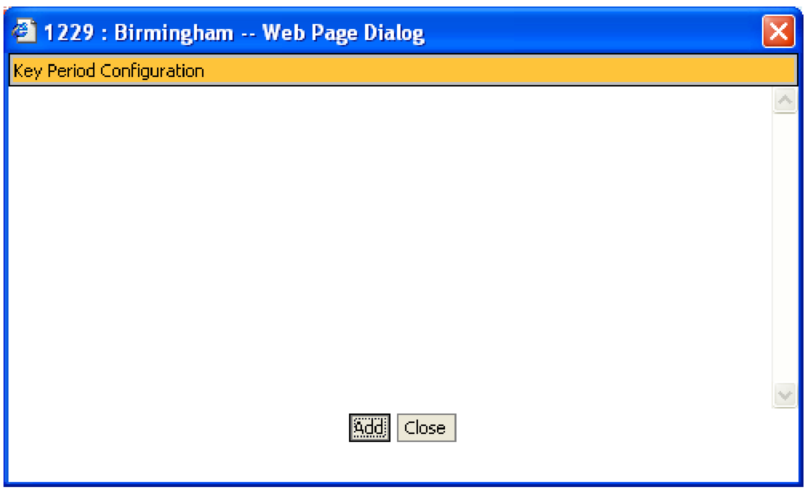
Adding a Key Period

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



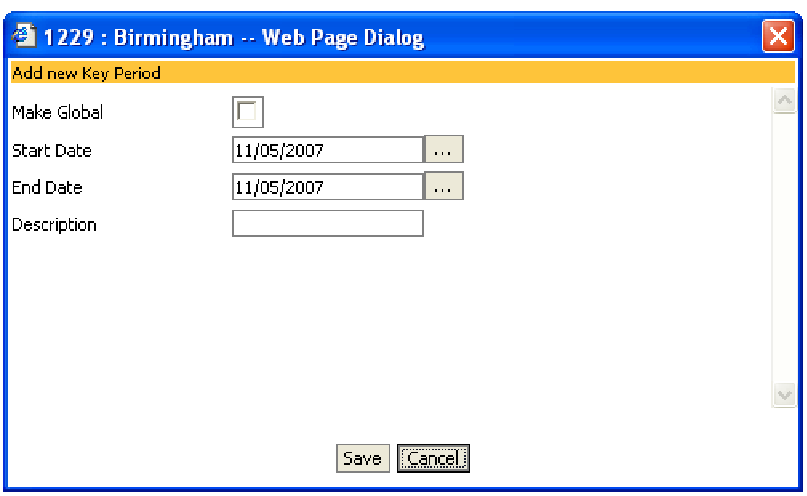
Absences window

3. Click **Key Period Setup…**.



Key Period Configuration window

4. Click **Add**.

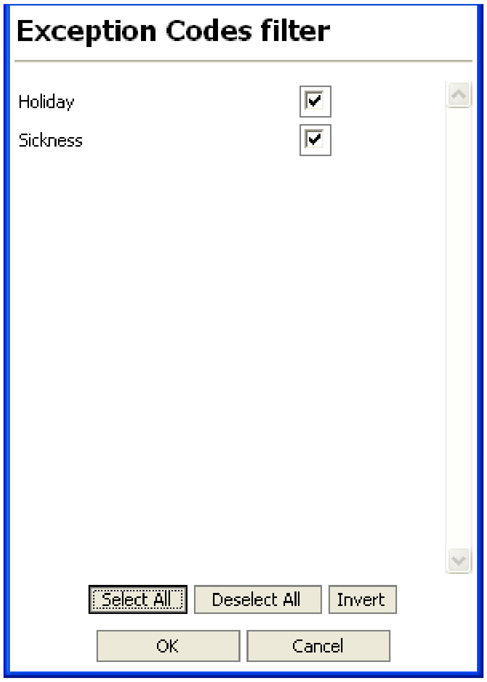


Add New Key Period window

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:



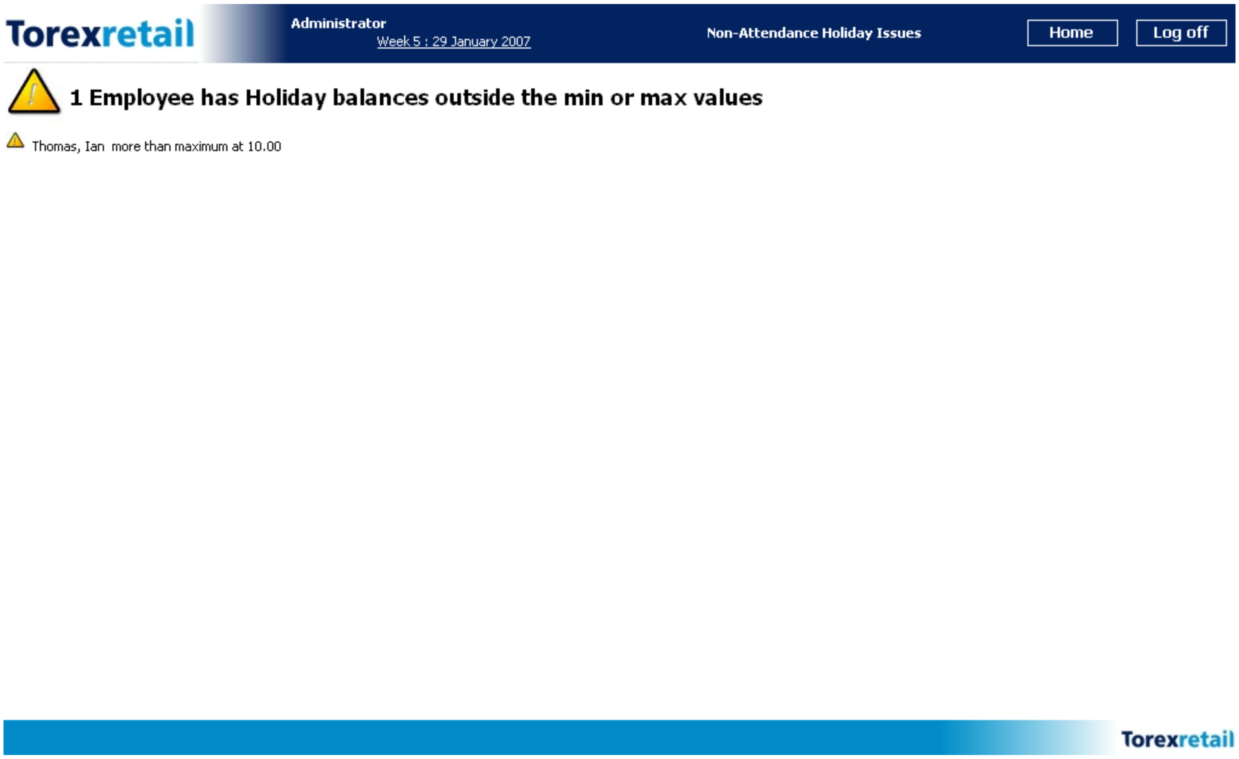
Exception Codes Filter window

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 

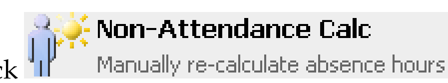
.
2. A screen, similar to that below, will be displayed:



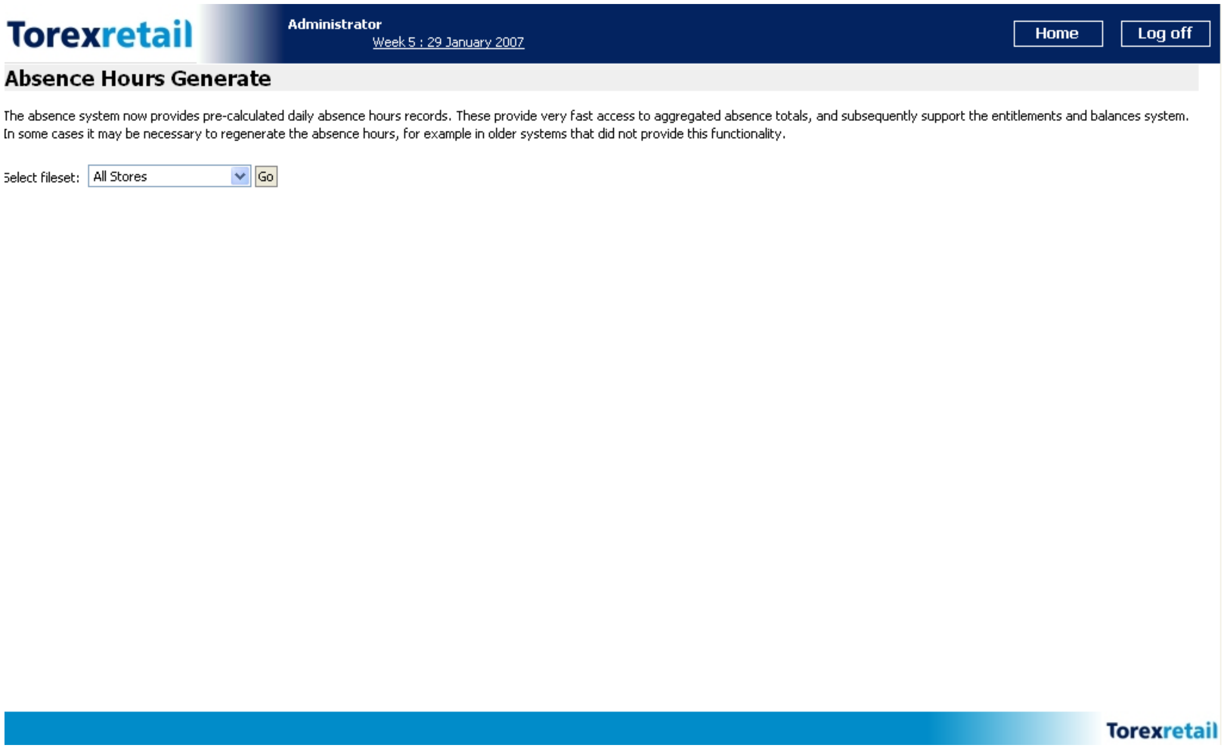
Holiday window

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

1. To view the Non-Attendance Calc, click 

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



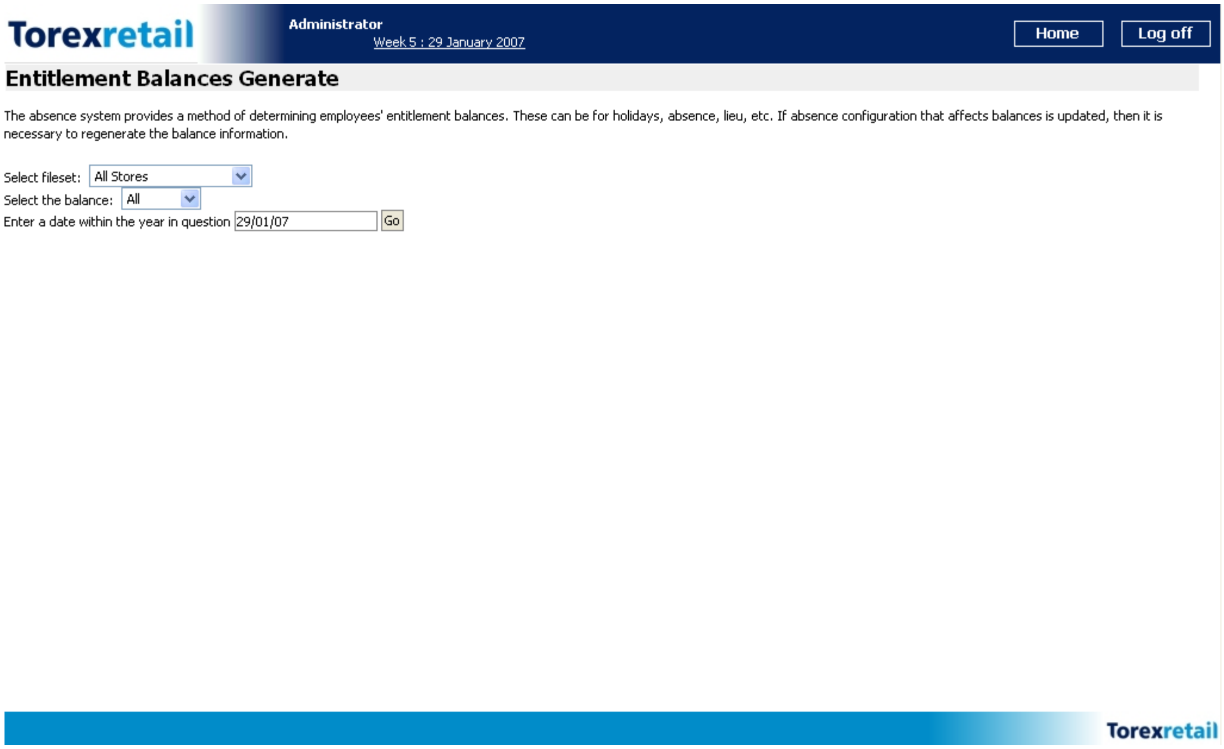
Absence Hours Generate window

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

1. To view the Balances Calc, click 

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



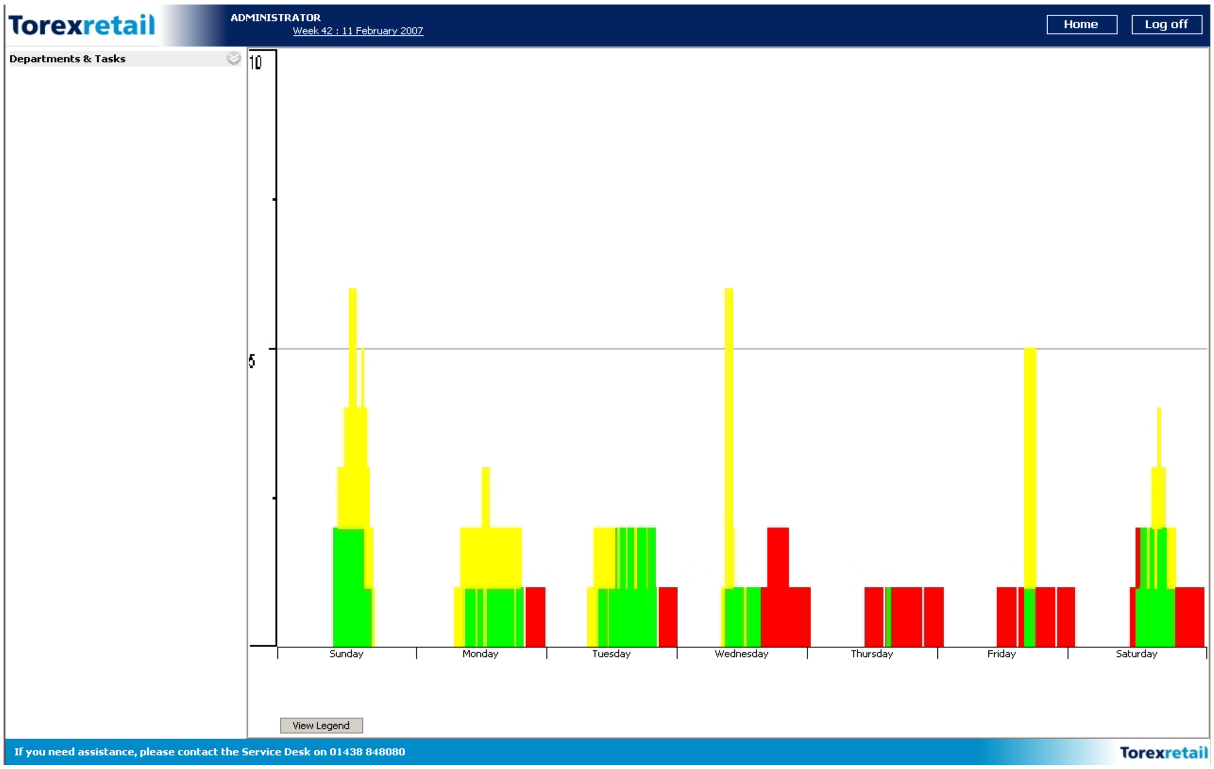
Entitlement Balances Generate window

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

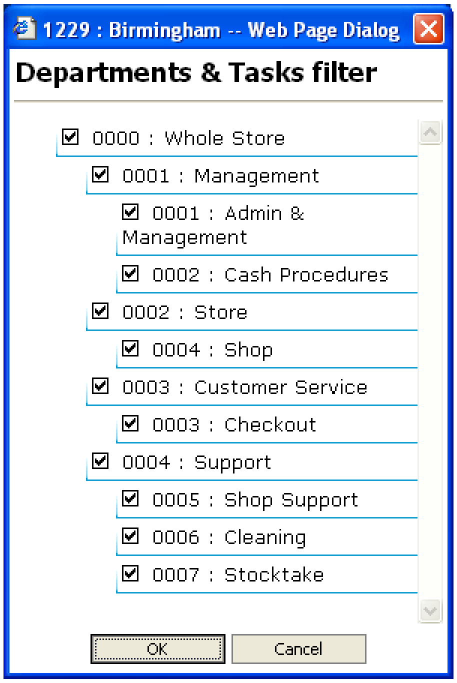
1. To view the Contract Fit screen, click 

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



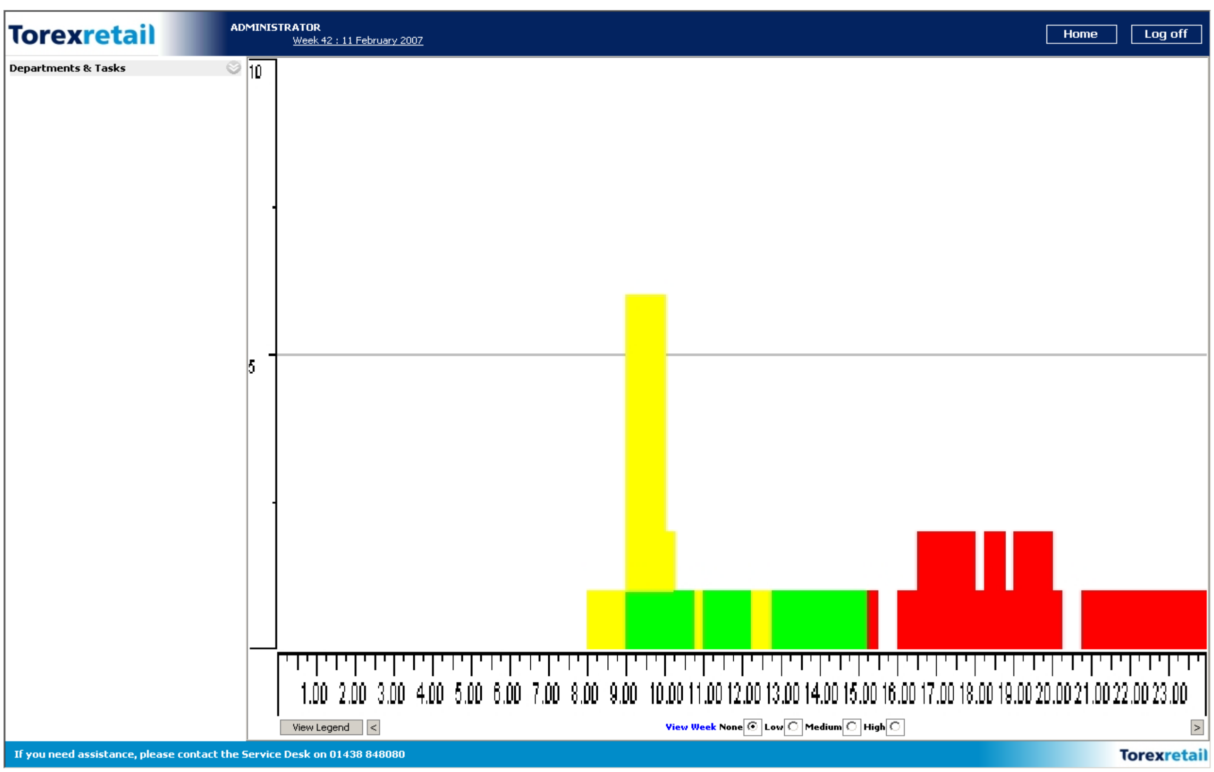
Contract Fit window

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

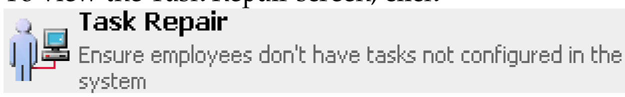
4. This screen allows you to alter the number of departments and tasks which are displayed in the graph. Unticking a department. For example, **Management** would remove it from the graph, altering its structure.
5. Clicking on one of the days of the week, will display the graph, with the times shown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



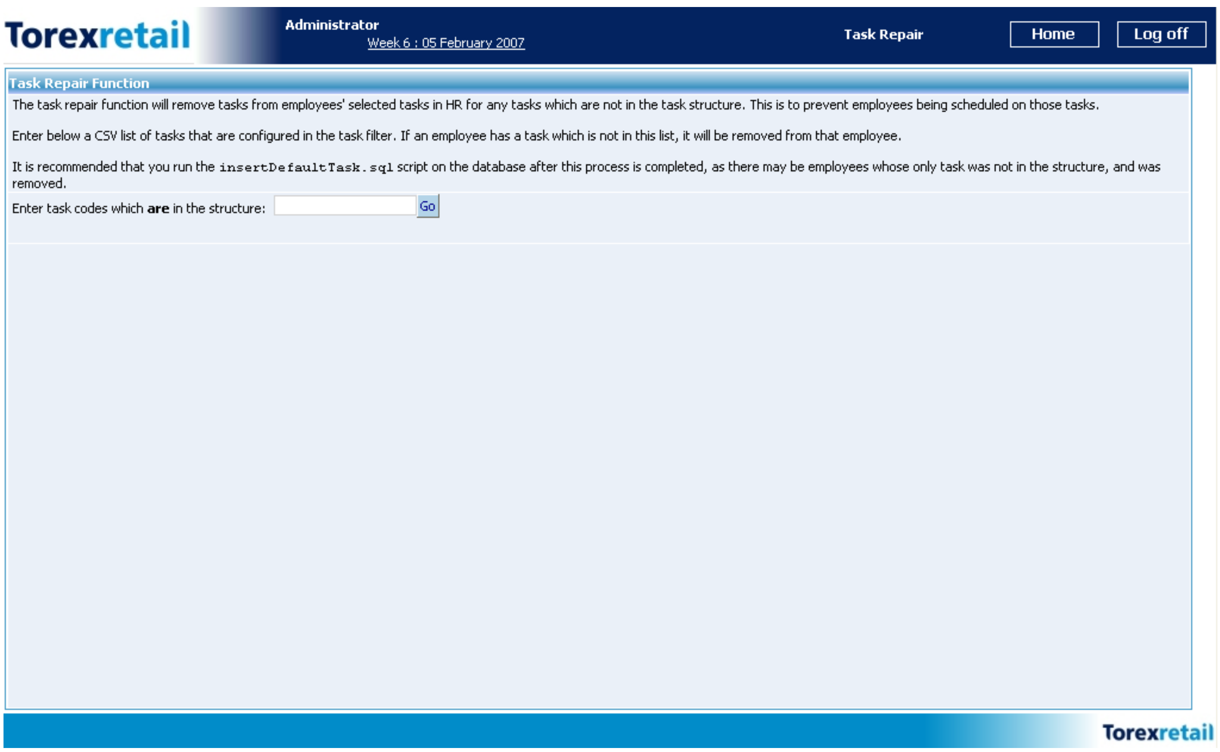
Days & Times window

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:



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.

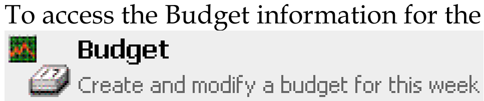
5

Forecasting

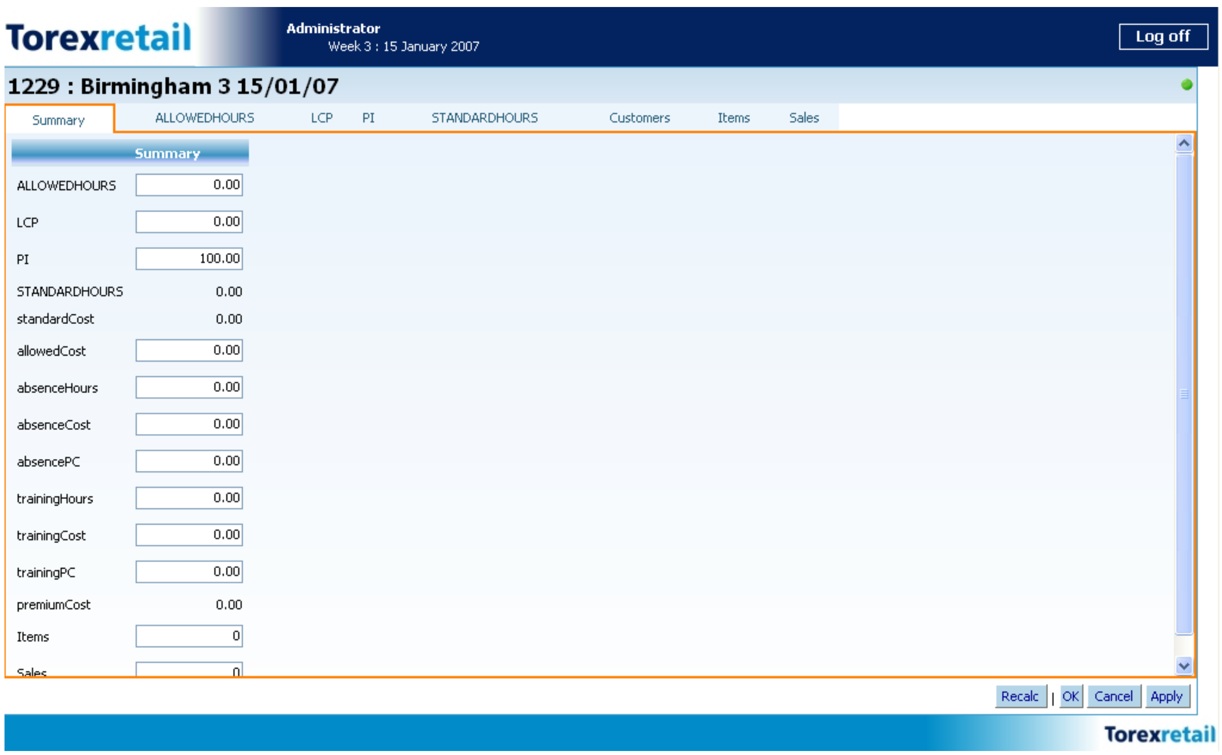
1. To access the Forecasting module of the system, click 

.

Budget

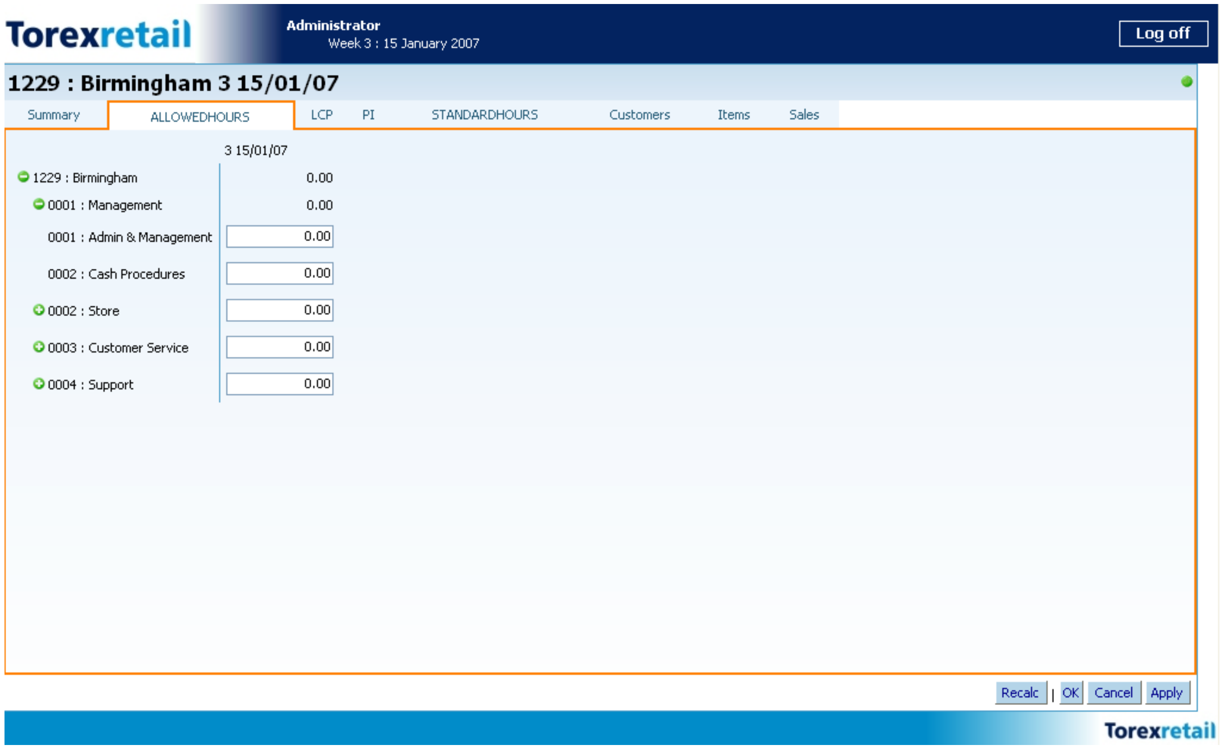
1. To access the Budget information for the week, click


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



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.



Allowed Hours window

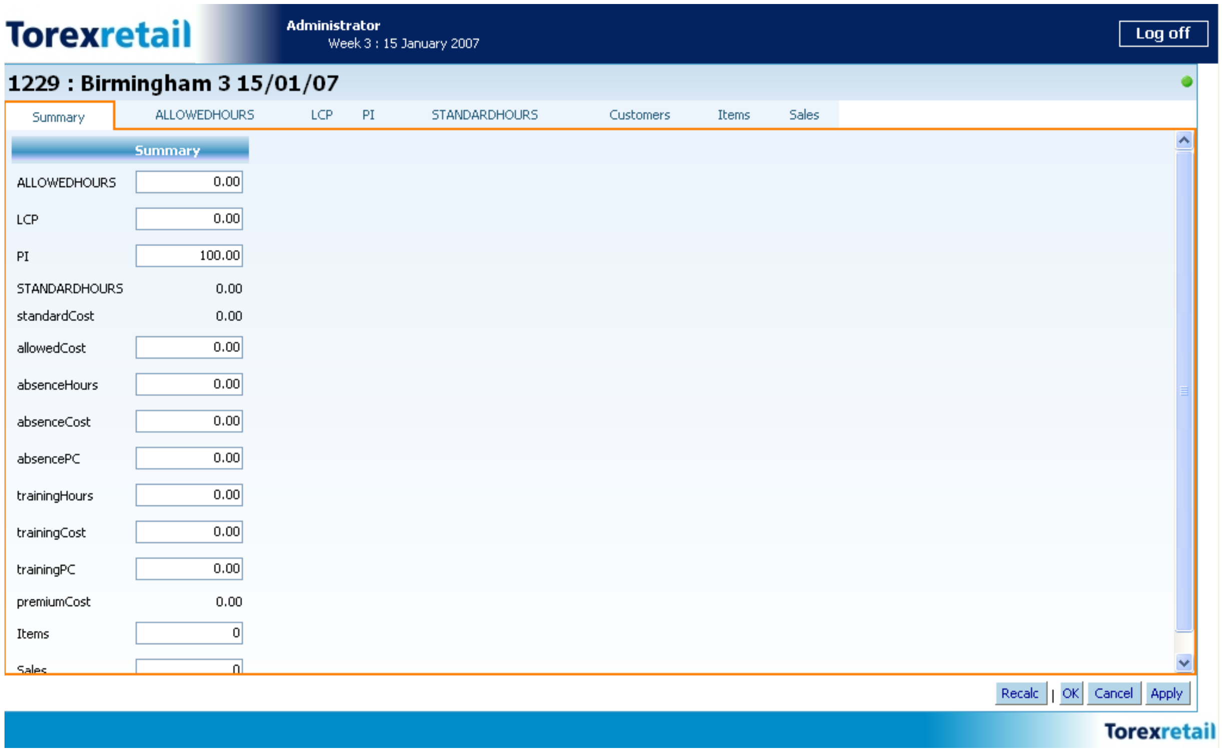
7. Click **Recalc** to update the screen with any changes you have made.
8. Click **Apply** to update the screen and to confirm the changes to the system.
9. Click **OK** to confirm any changes and close the screen or **Cancel** to disregard.

Target

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

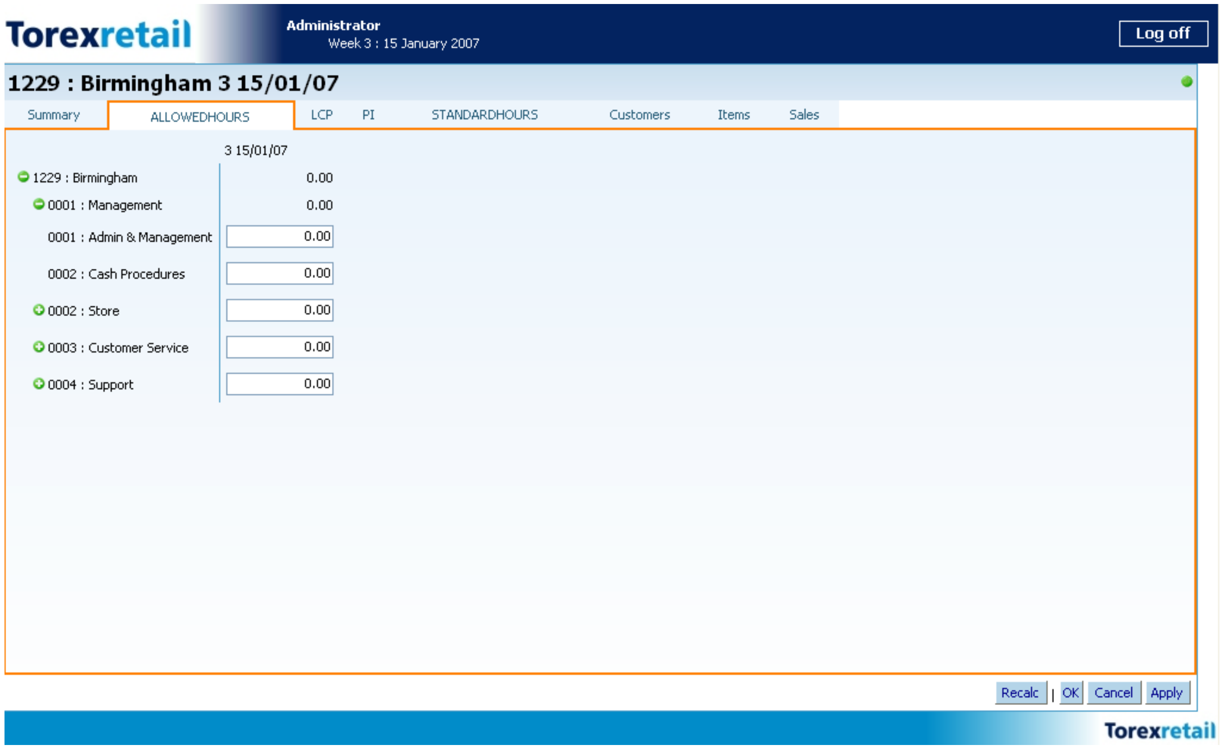
.

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



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.

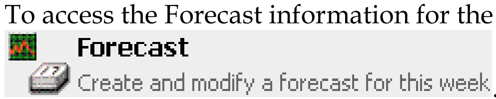


Allowed Hours window

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.

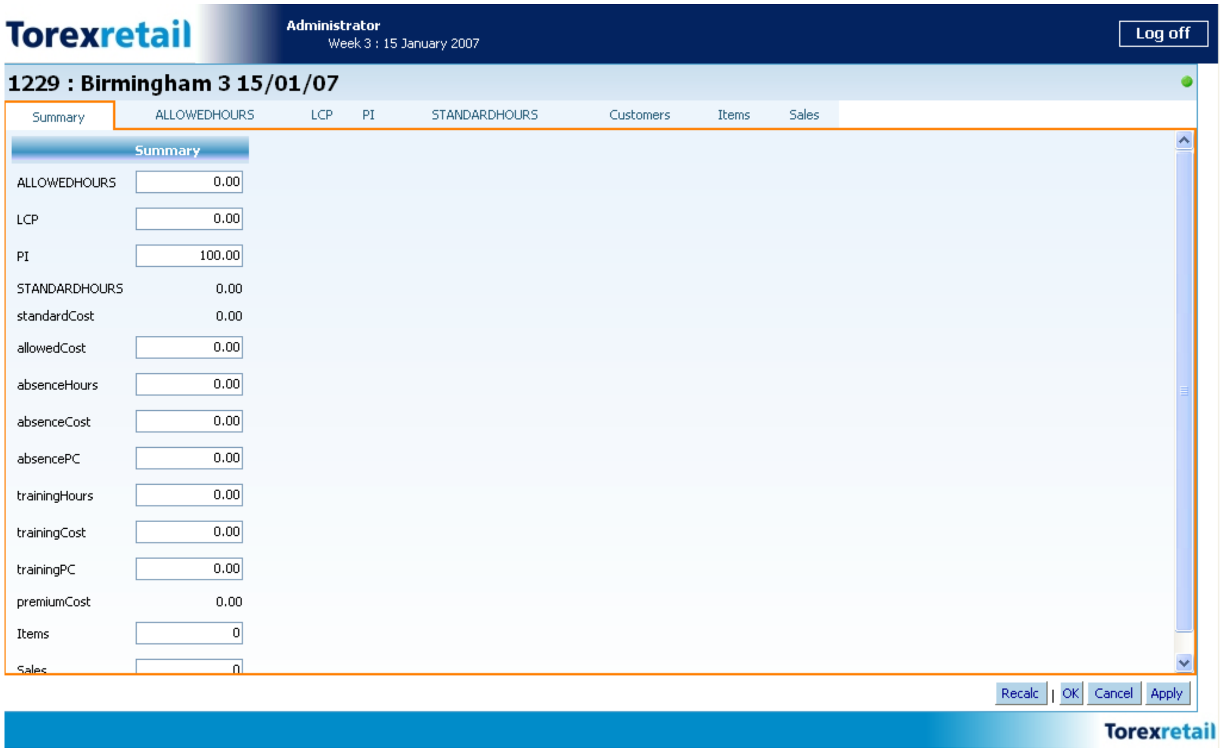
Forecast

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



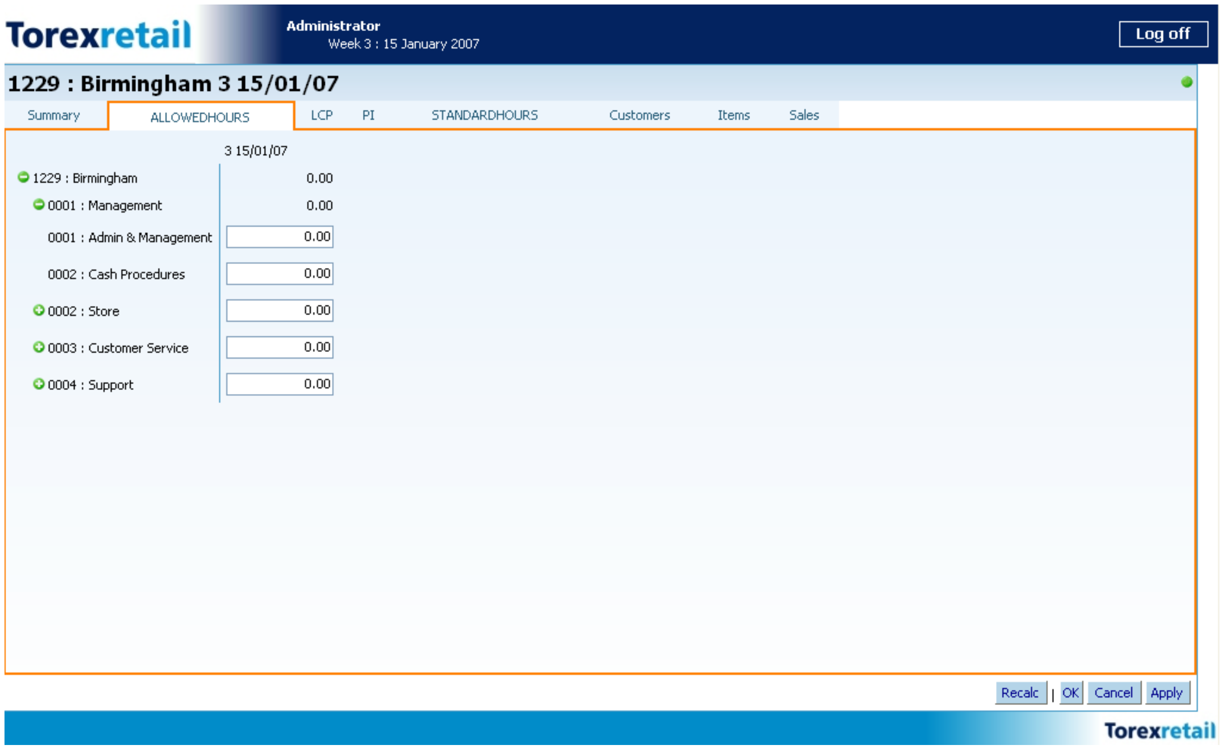
.

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



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.



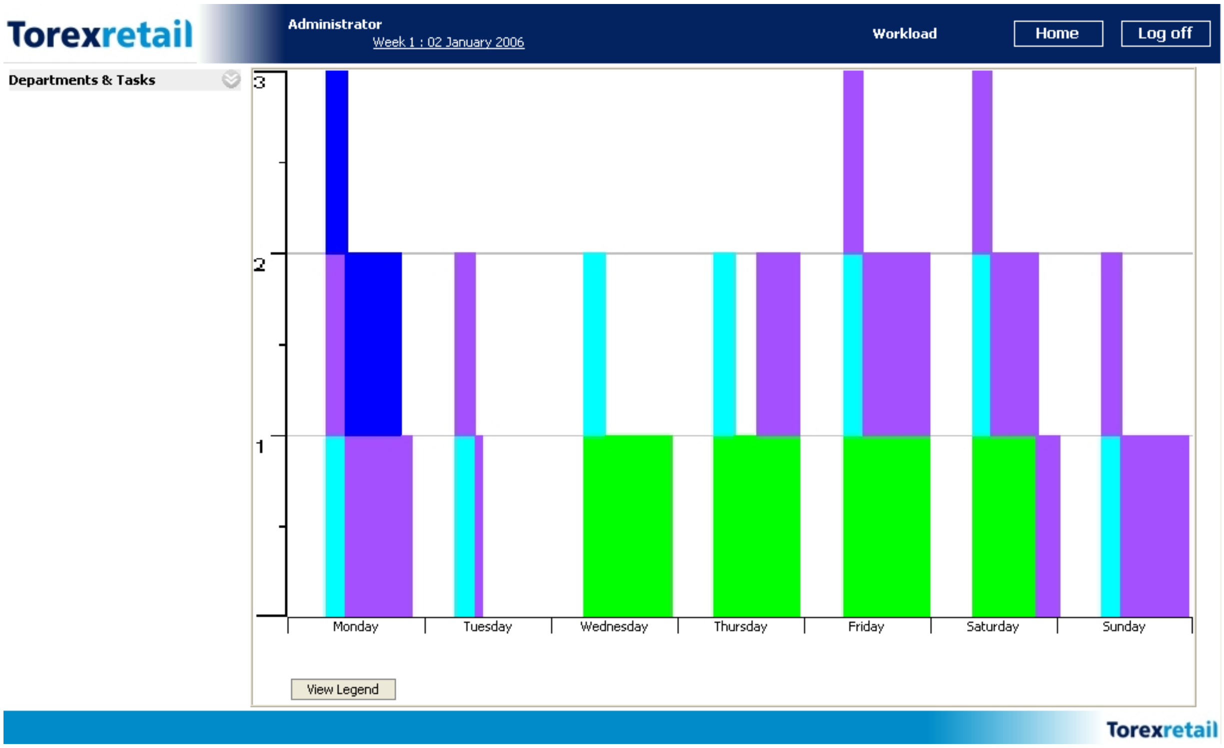
Allowed Hours window

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

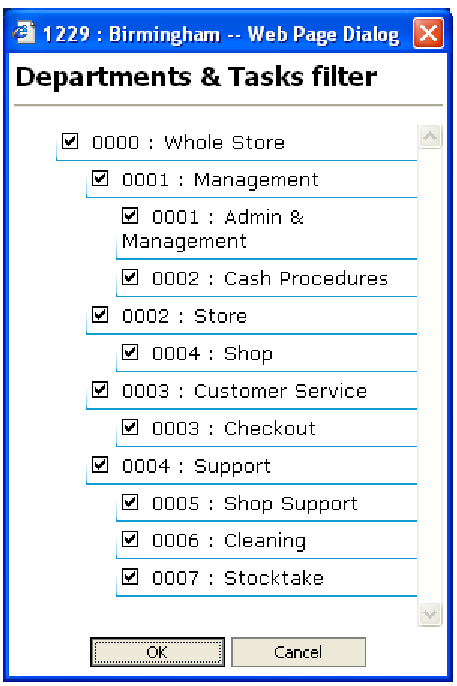
1. To view a graphical representation of the Workload, click 

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



Department & Tasks window

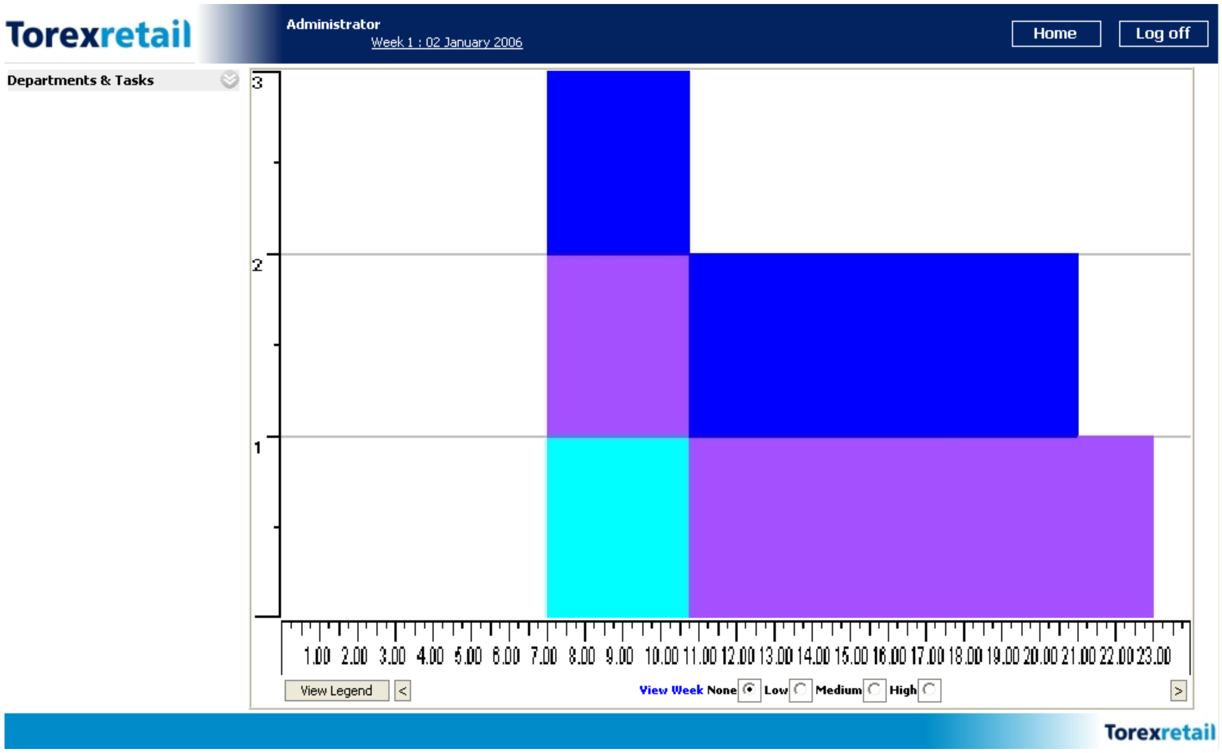
3. Clicking **Departments & Tasks** link, in the top left hand corner of the screen, will display a window, similar to that below:



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.

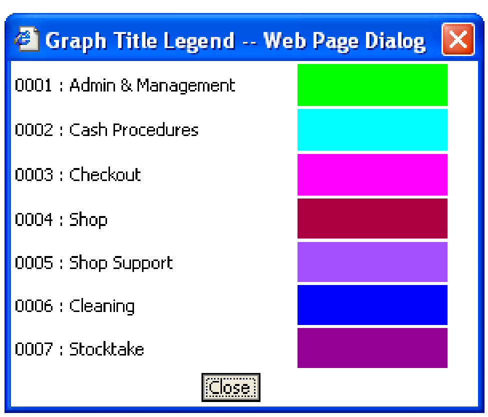


Graph window

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

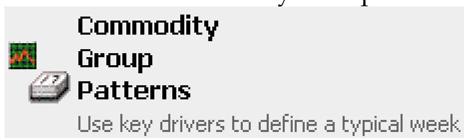
1. Clicking **View Legend** will indicate which task each color corresponds to.



Graph Title Legend window

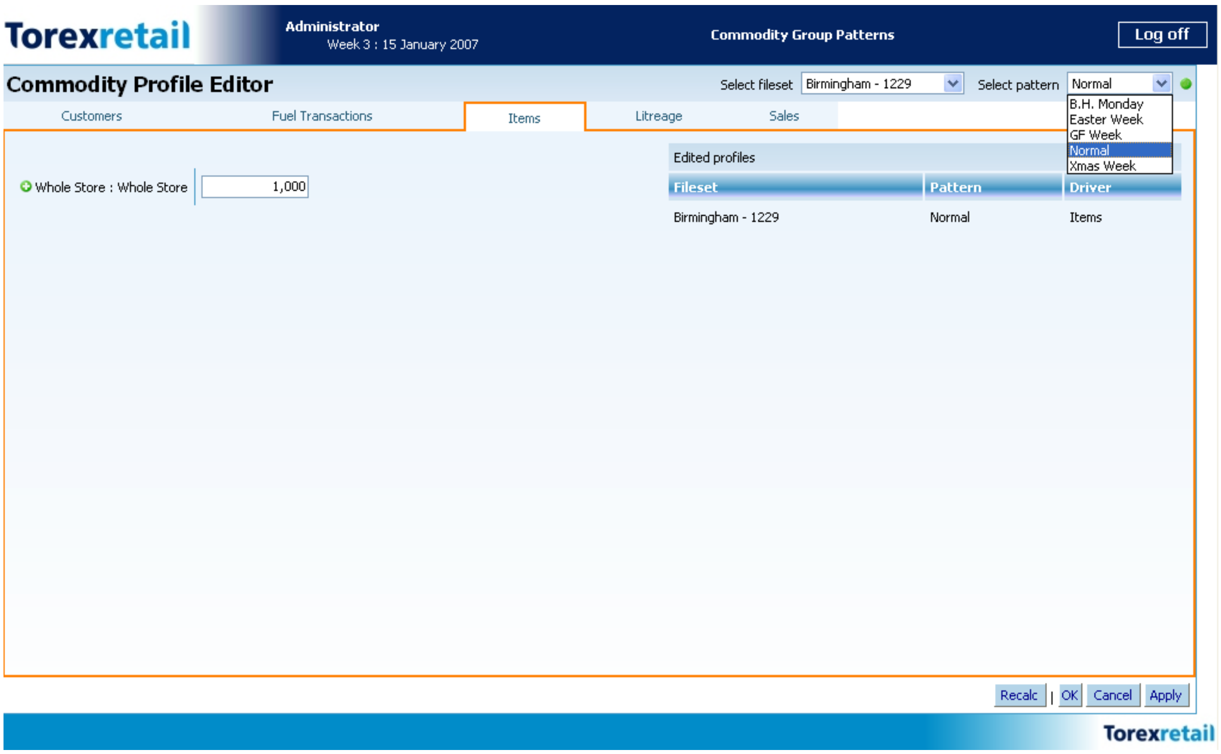
Commodity Group Patterns

1. To view the Commodity Group Patterns screen, click



.

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



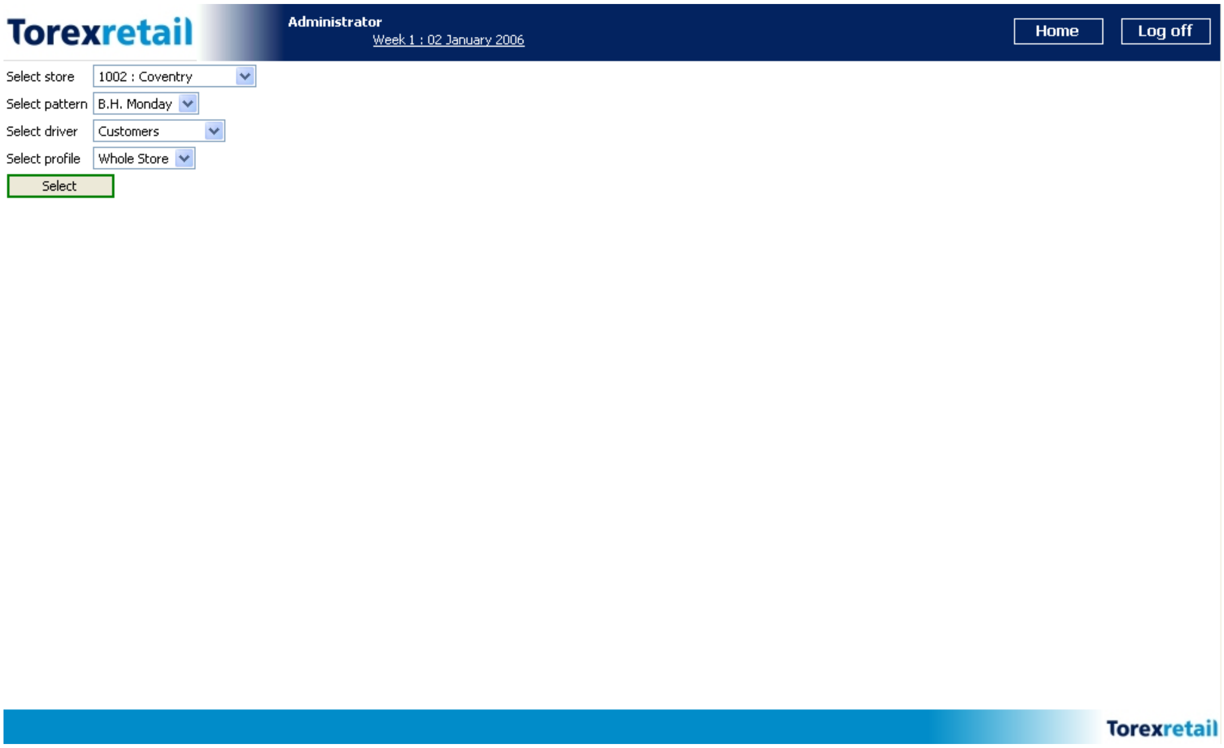
Commodity Profile Editor window

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

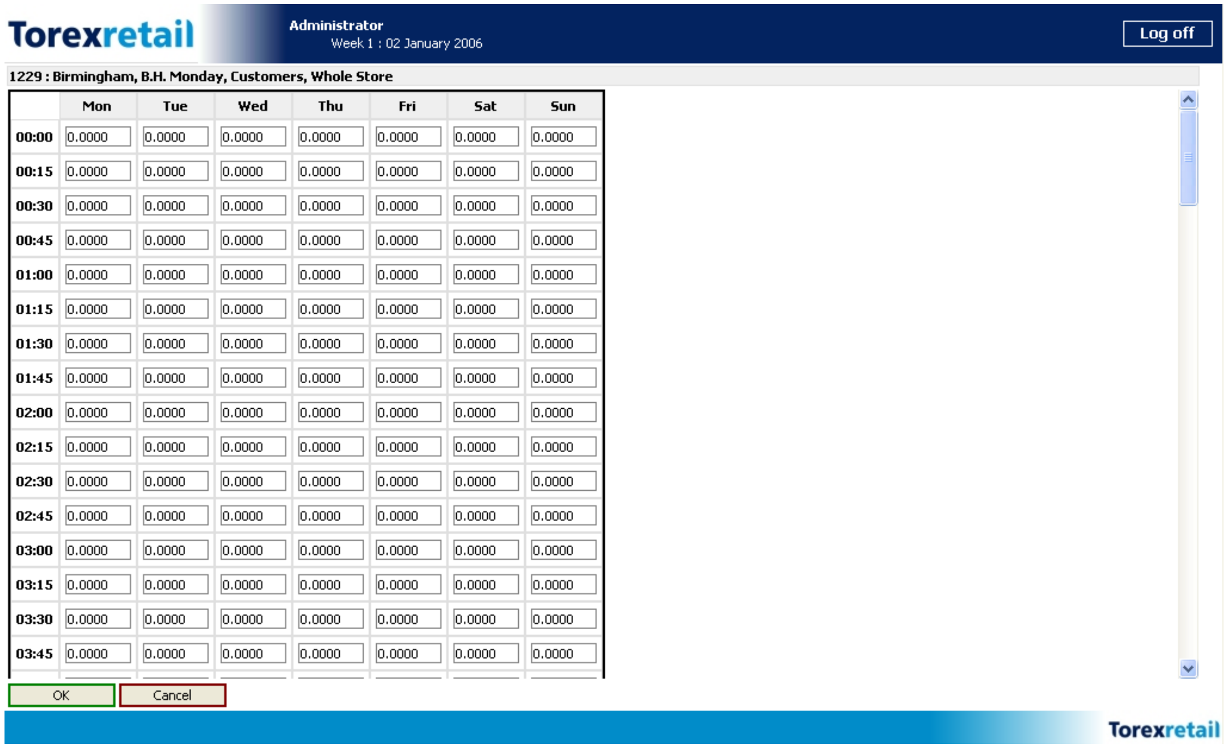
1. To view and edit the Trading Profiles, click 

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



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.



List of Values window

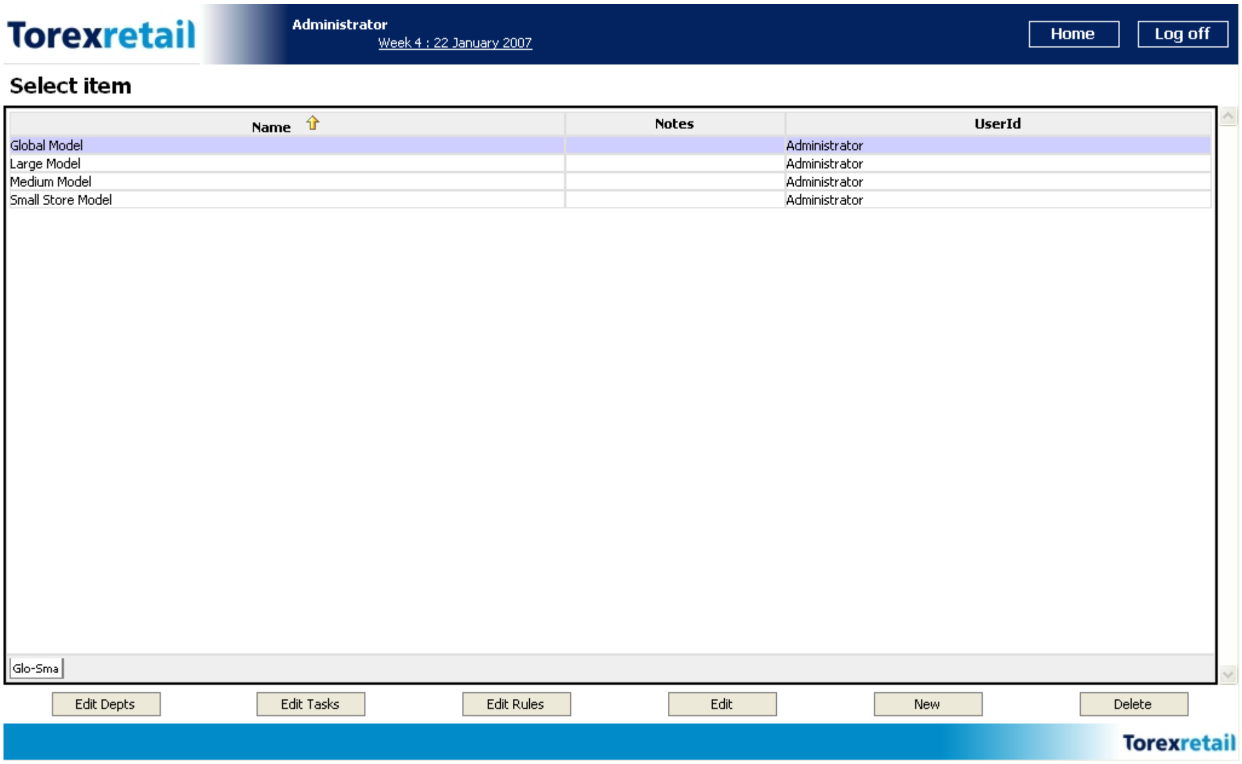
5. Make any changes and click **OK** to confirm or **Cancel** to disregard.

Models

1. To access the Models area of the system, click 

.

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



Models 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.

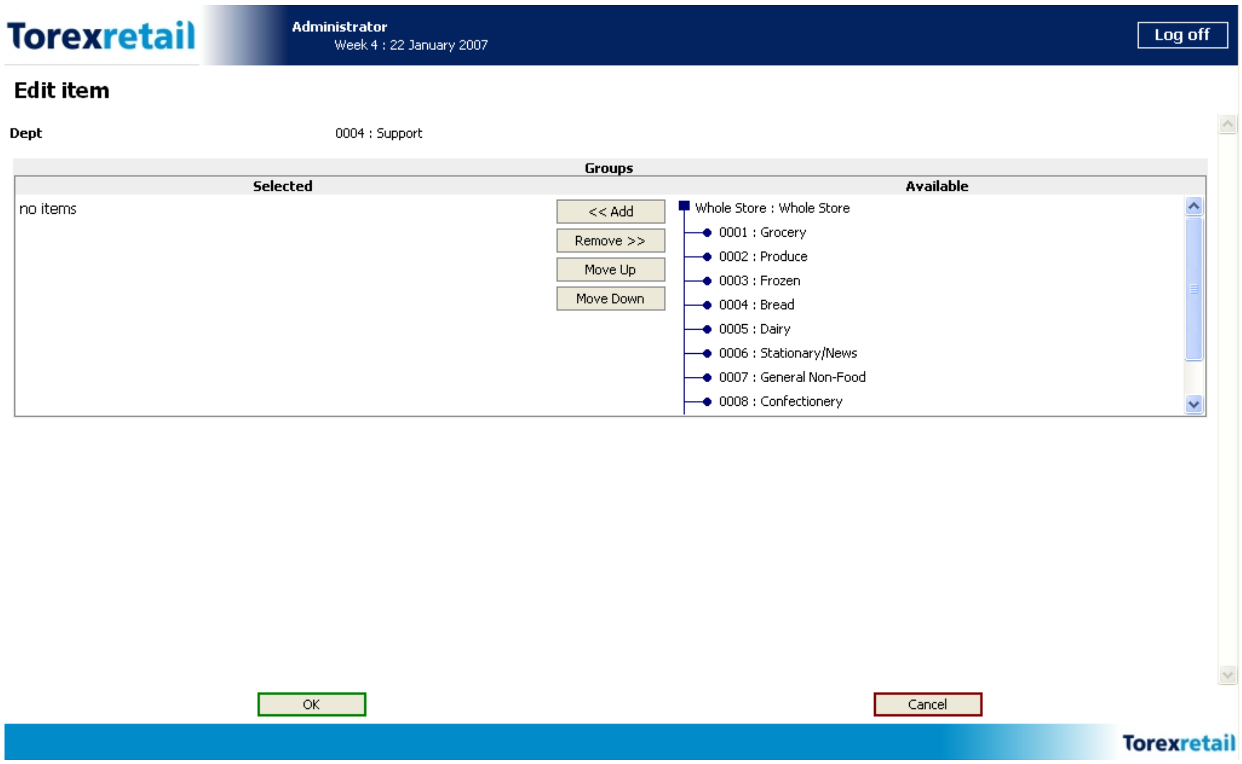
Delete a Model

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:



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.

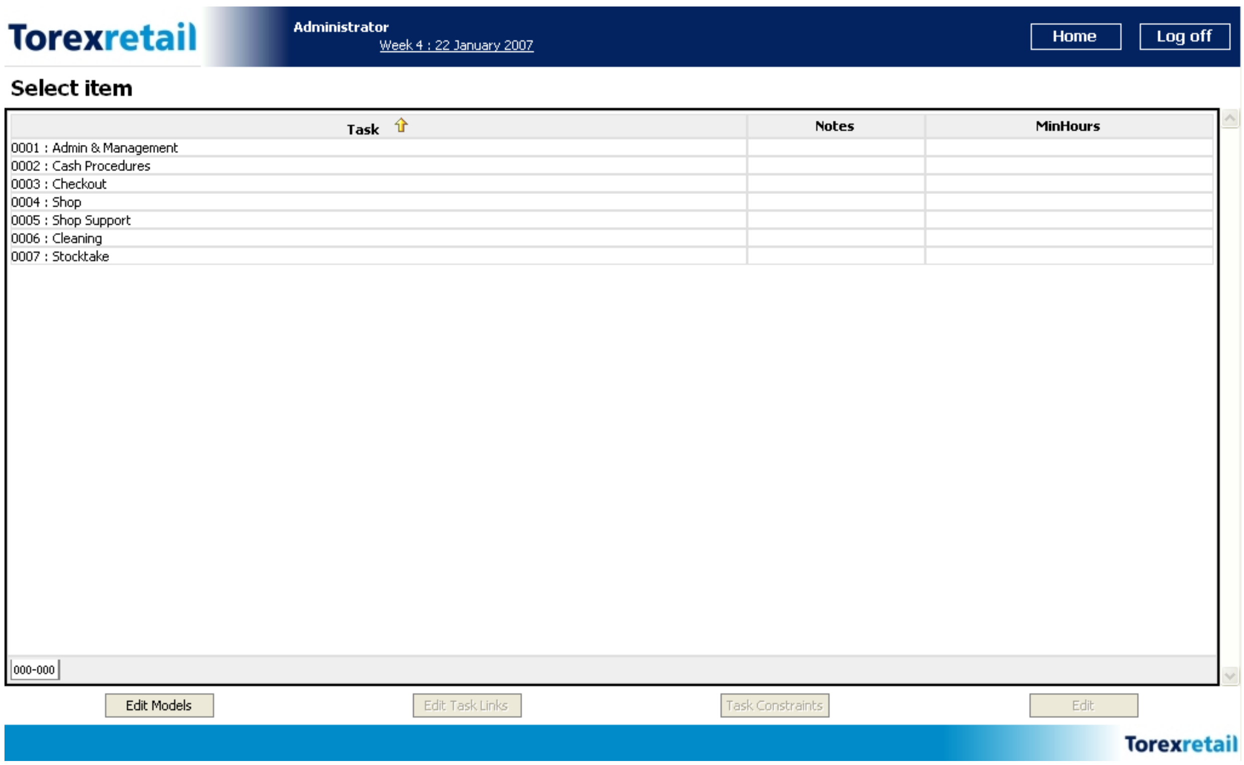
4. To confirm the changes, click **OK** at the bottom of the screen or **Cancel** to disregard any changes.

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:

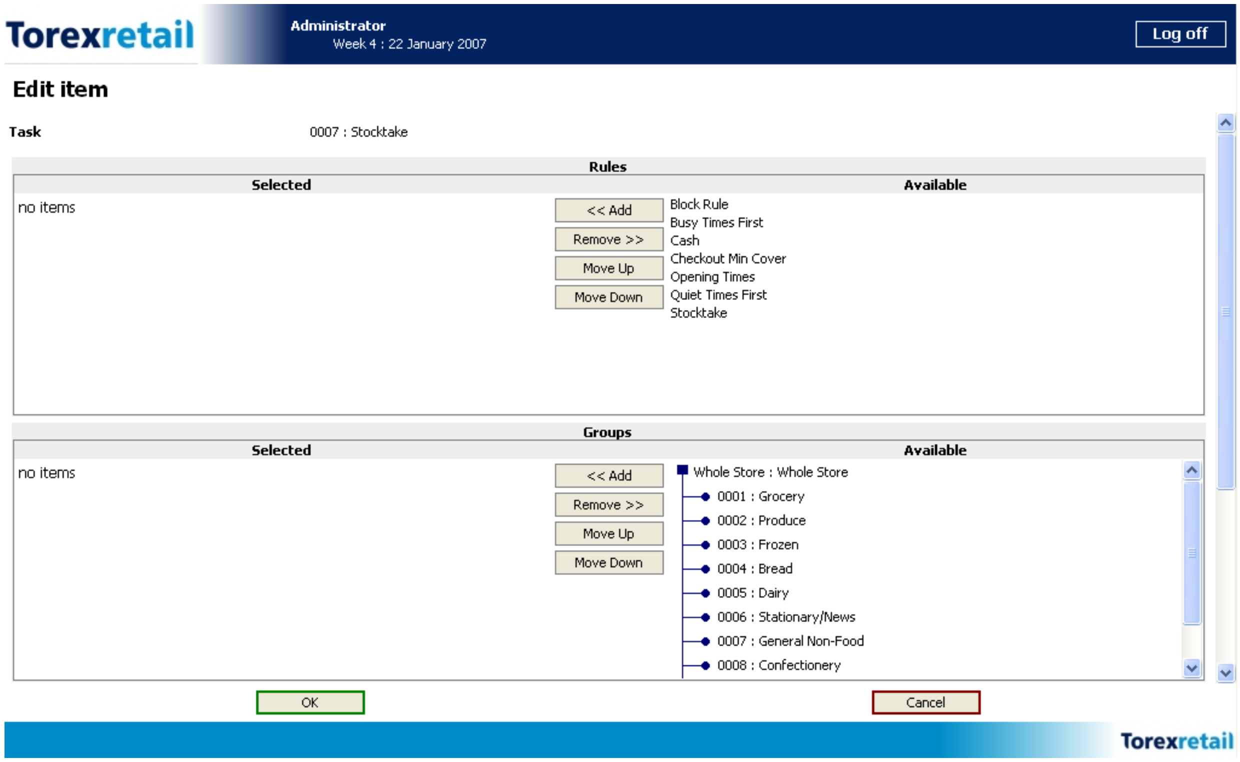


Tasks window

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 window

3. Click relevant **Rules** / **Groups** or **Elements**, on the right hand side of the screen and then click **<< Add**.
4. 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.

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

Remove a Task Link

1. To remove 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 **Remove >>**.
3. 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.

4. 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**.

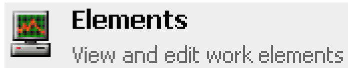
Edit the Rules

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

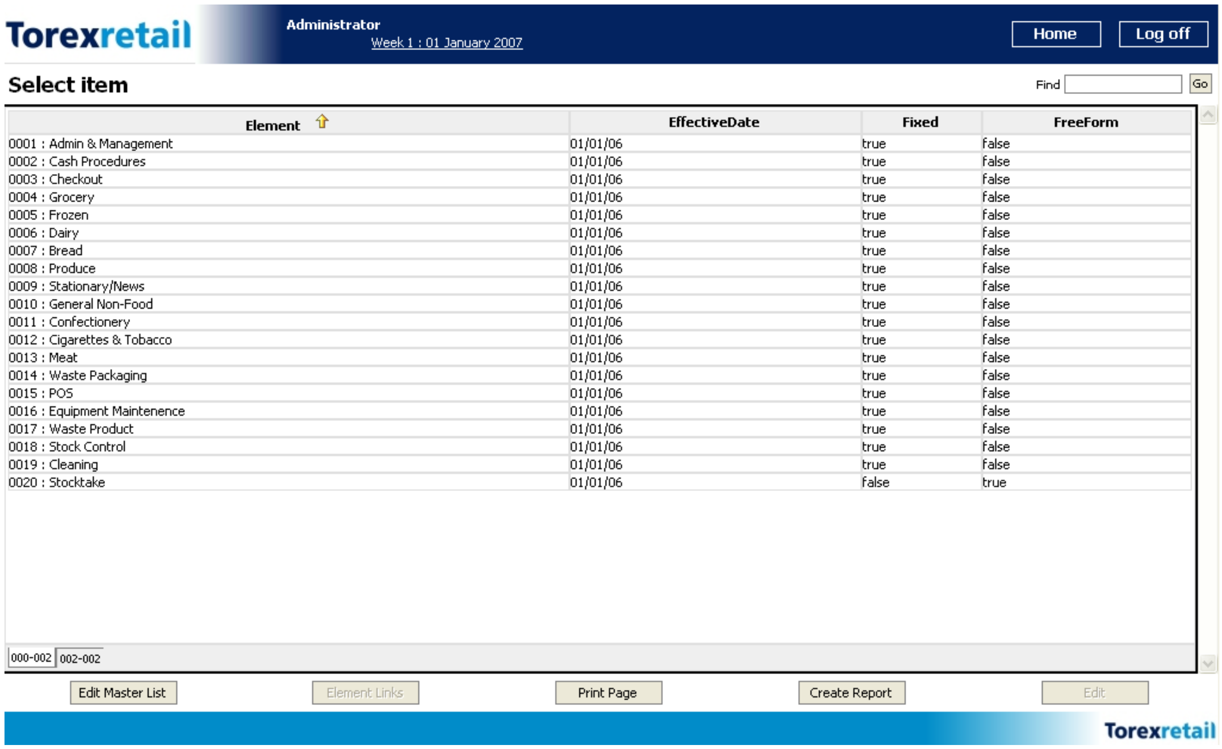
1. To edit the Daily Option, select the applicable Rule and click **Edit Daily Options**.
2. Select the applicable day and click **Edit**.
3. Make the appropriate changes and click **OK** to confirm or **Cancel** to disregard.

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 Maintenence	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 **C**onfectionary, and you search for the **C**onfectionary, 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.

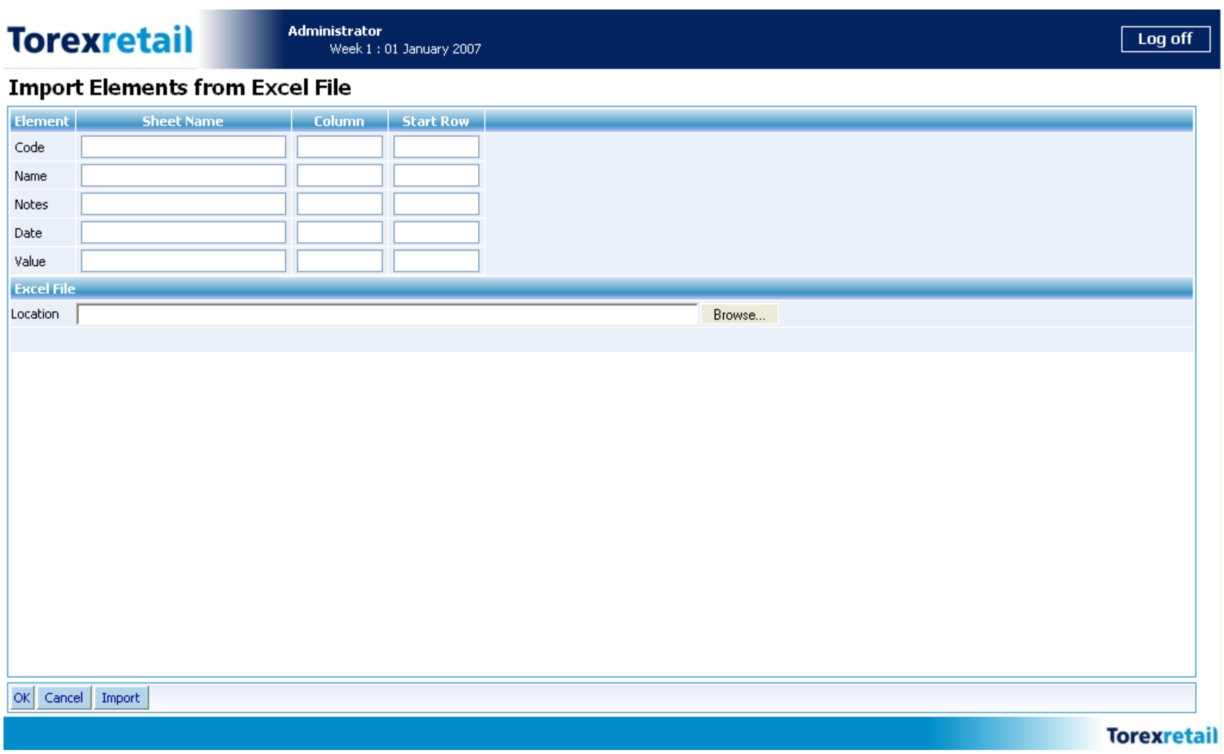
> **Note:** It is advisable to begin each code number with leading 0's for example, Instead of 20, write 0020. This will ensure the list is displayed in numerical order on the main element page.

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.

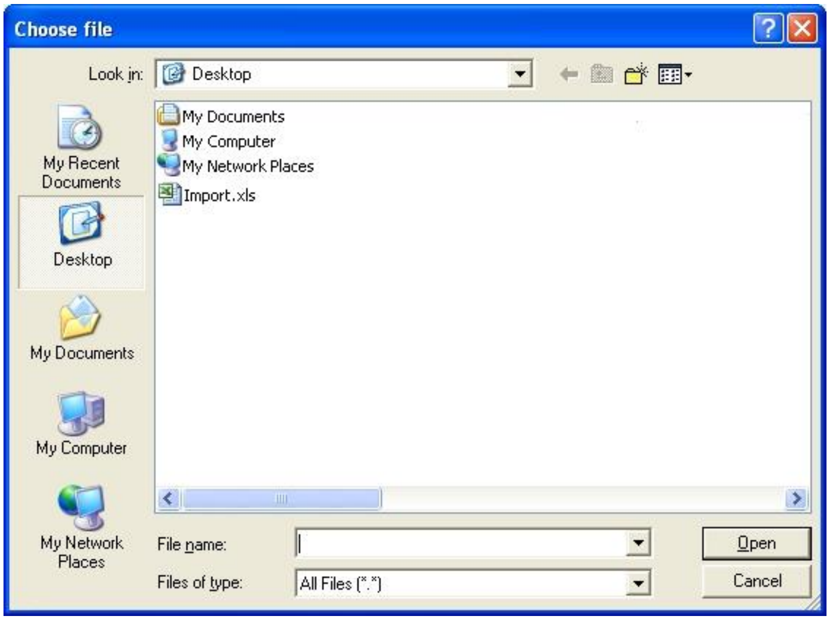
1. To Import a list of elements, ensure that you have clicked on the **Edit Master List**.
2. Click **Add New**.
3. Click **Import from File**.
4. A screen, similar to that below, will be displayed:



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**.

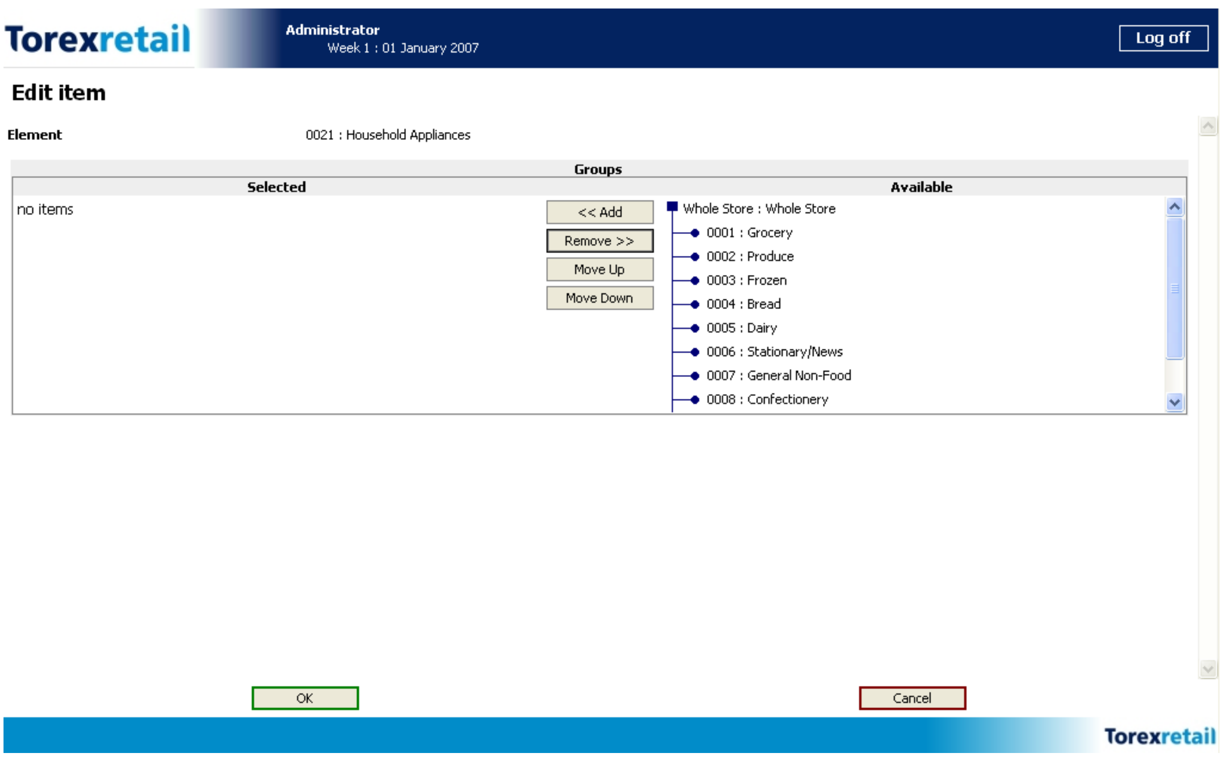
> **Note:** You are only able to delete elements on the page currently being displayed. Repeat the process below on each applicable page.

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:



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.

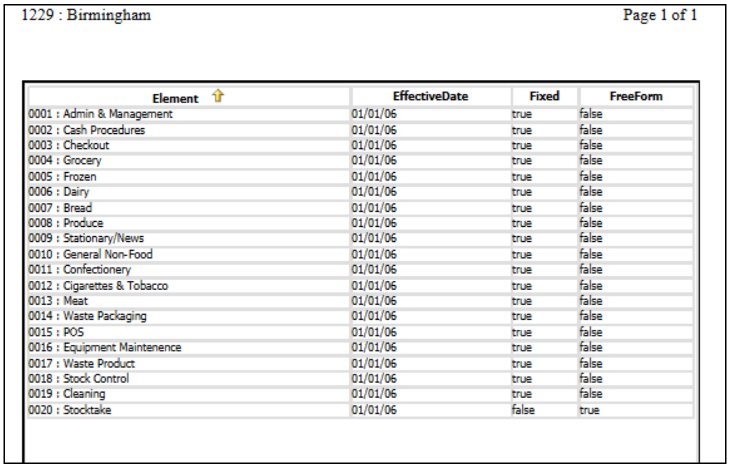
4. To confirm the changes, click **OK** at the bottom of the screen or **Cancel** to disregard any changes.

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:

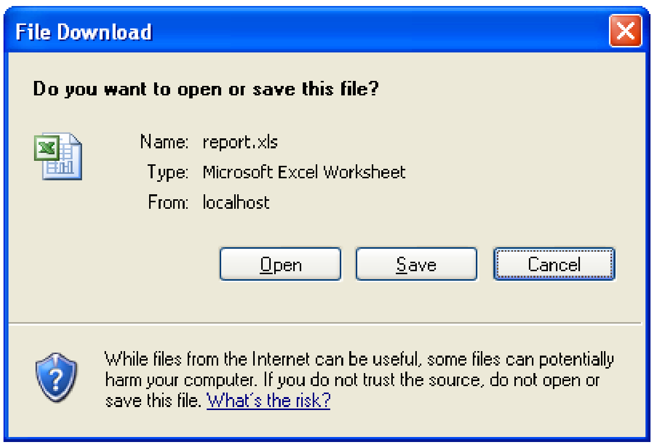

1229 : Birmingham Page 1 of 1

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 Maintenence	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:

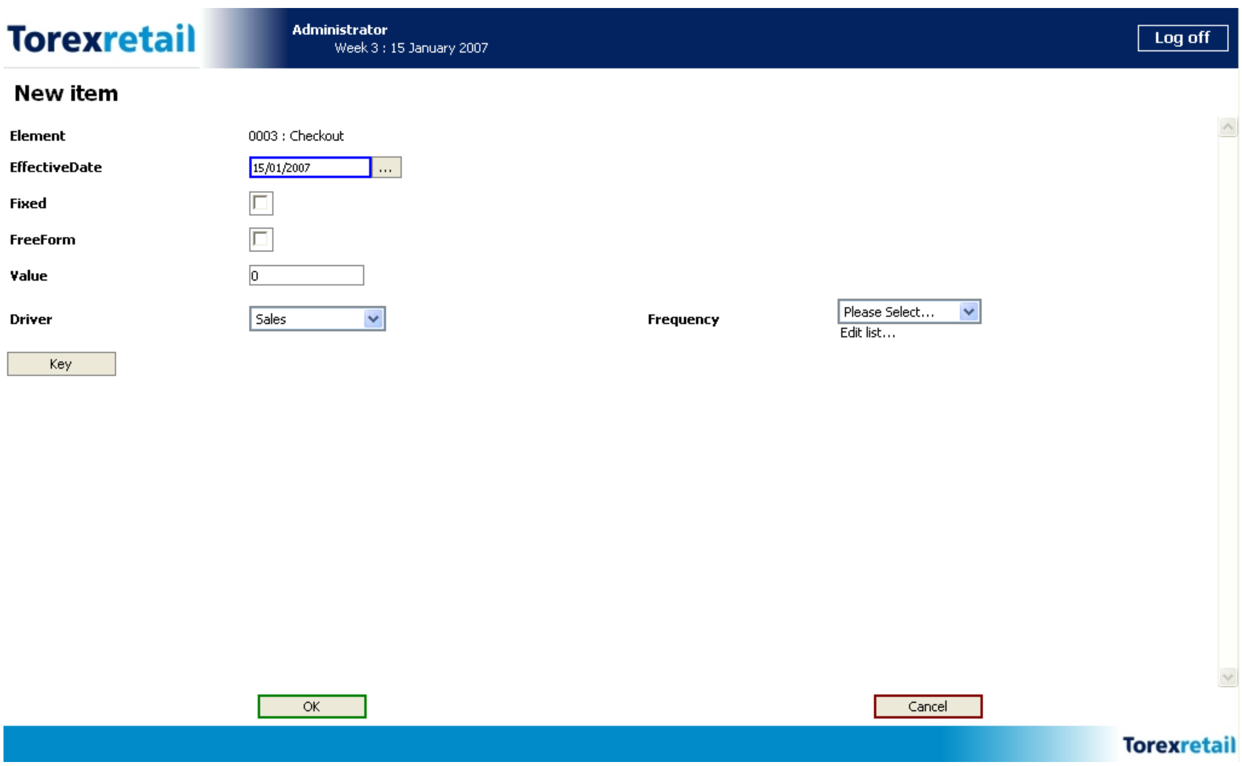
Work Elements Report Run Date: 03/01/07 Page 1

Work Element	Effective Date	SCRIPT	SMV	Driver	Frequency
0001 : Admin & Management	01/01/06		514	No Driver	6 : Once Per Day
0011 : Confectionery	01/01/06		0.0550	Items	5 : Once Per Week
0009 : Stationary/News	01/01/06		0.17	Items	5 : Once Per Week
0002 : Cash Procedures	01/01/06		220	No Driver	6 : Once Per Day
0007 : Bread	01/01/06		0.05	Items	5 : Once Per Week
0003 : Checkout	01/01/06		0.83	Customers	5 : Once Per Week
0014 : Waste Packaging	01/01/06		157.20	No Driver	6 : Once Per Day
0015 : POS	01/01/06		99	No Driver	6 : Once Per Day
0008 : Produce	01/01/06		0.15	Items	5 : Once Per Week
0005 : Frozen	01/01/06		0.5120	Items	5 : Once Per Week
0004 : Grocery	01/01/06		0.30	Items	5 : Once Per Week
0013 : Meat	01/01/06		2.0250	Items	5 : Once Per Week
0006 : Dairy	01/01/06		0.20	Items	5 : Once Per Week
0012 : Cigarettes & Tobacco	01/01/06		0.14	Items	5 : Once Per Week
0016 : Equipment Maintenence	01/01/06		108	No Driver	6 : Once Per Day
0017 : Waste Product	01/01/06		165	No Driver	6 : Once Per Day
0019 : Cleaning	01/01/06		120	No Driver	6 : Once Per Day
0018 : Stock Control	01/01/06		130	No Driver	6 : Once Per Day
0020 : Stocktake	01/01/06	$if(store params.Stocktake <1,0,3226.80)/60;			

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:

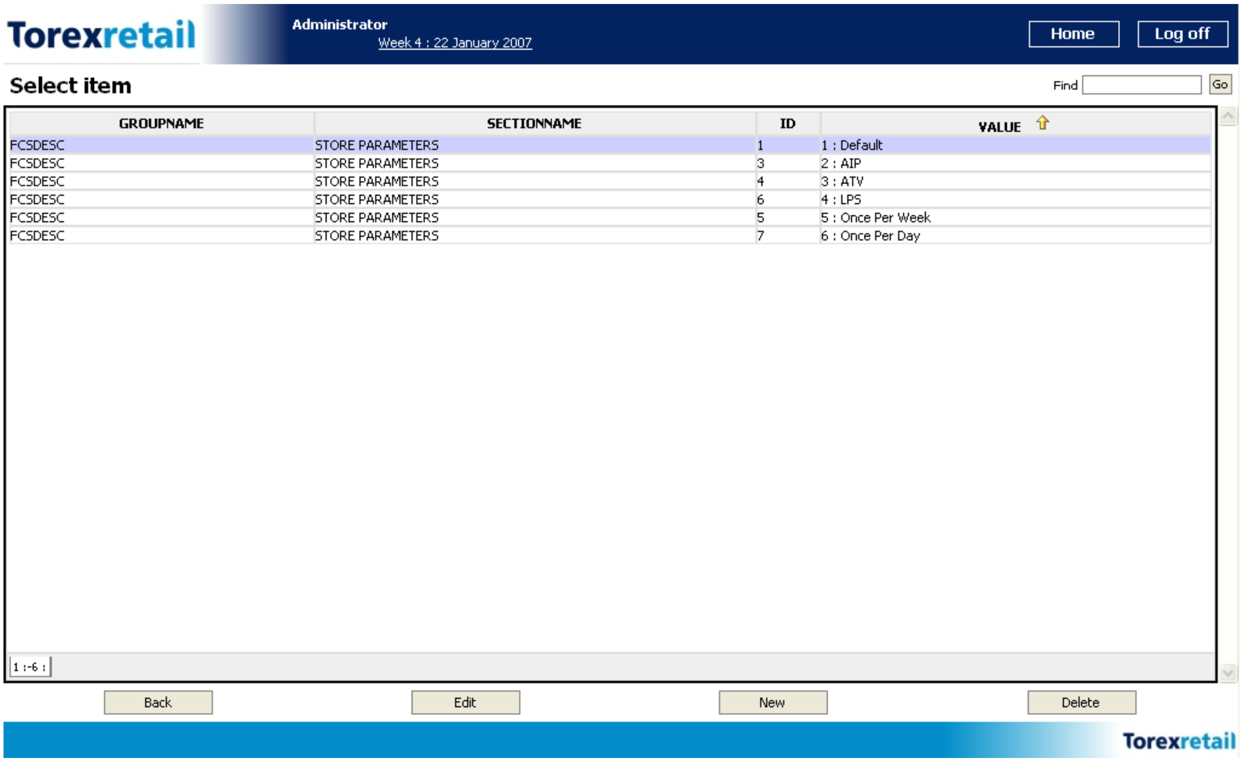


New Item window

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:



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

1. To view the Store Parameters, click 

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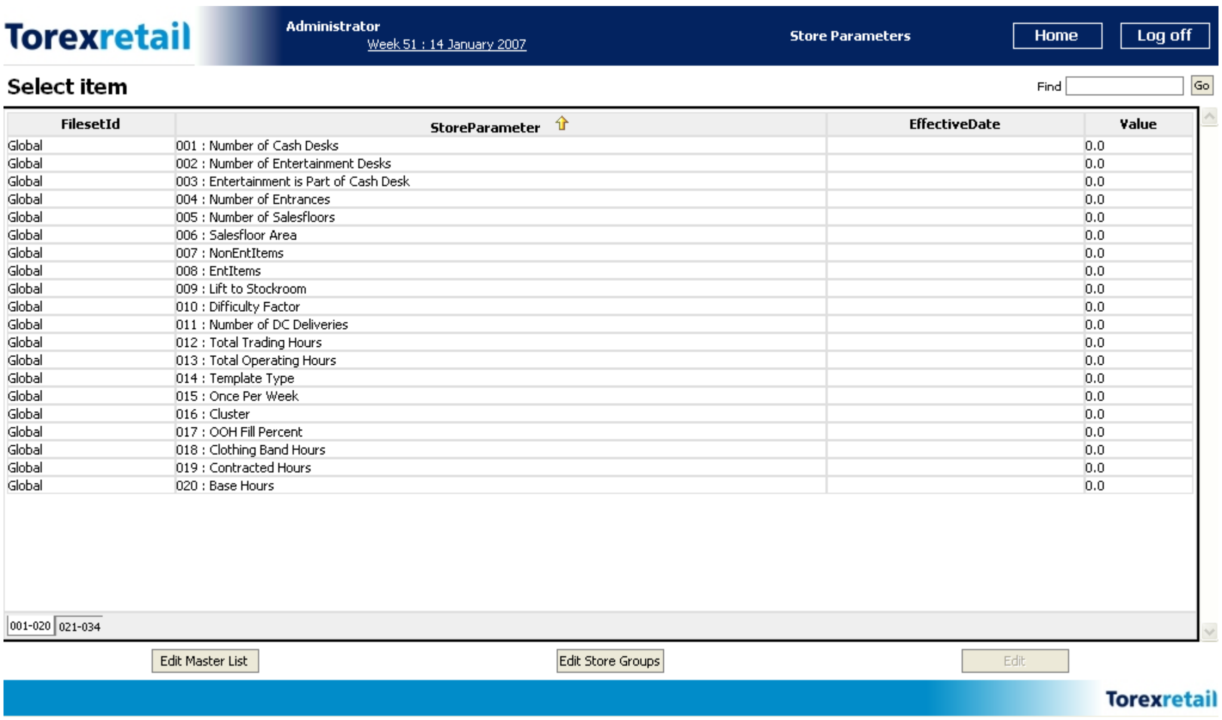
2. A screen, similar to that below, will be displayed:



Store Parameters window

Finding a Parameter

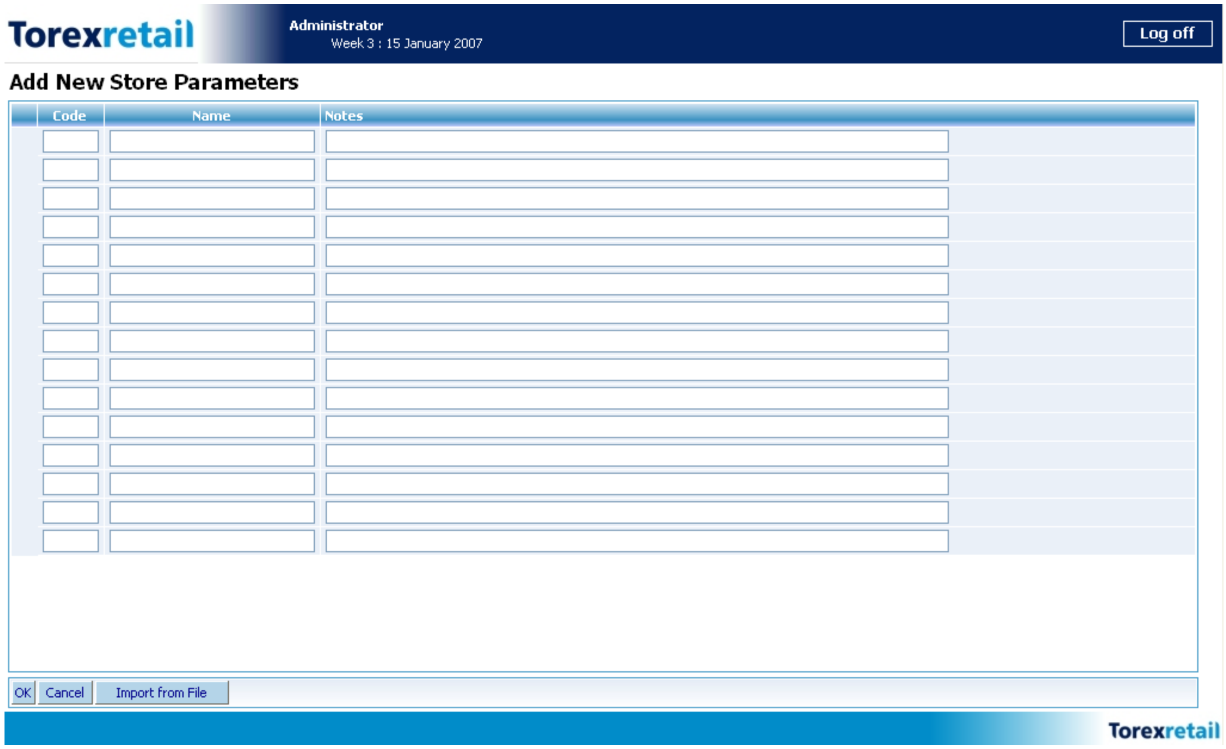
1. To locate a Parameter, on any of the pages, you can use the **Find** box, in the top right hand corner of the screen.

> **Note:** This **Find** box is case sensitive. For example, if you are trying to find the word **C**onfectionary and you search for the word **c**onfectionary, 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.



Add a Parameter window

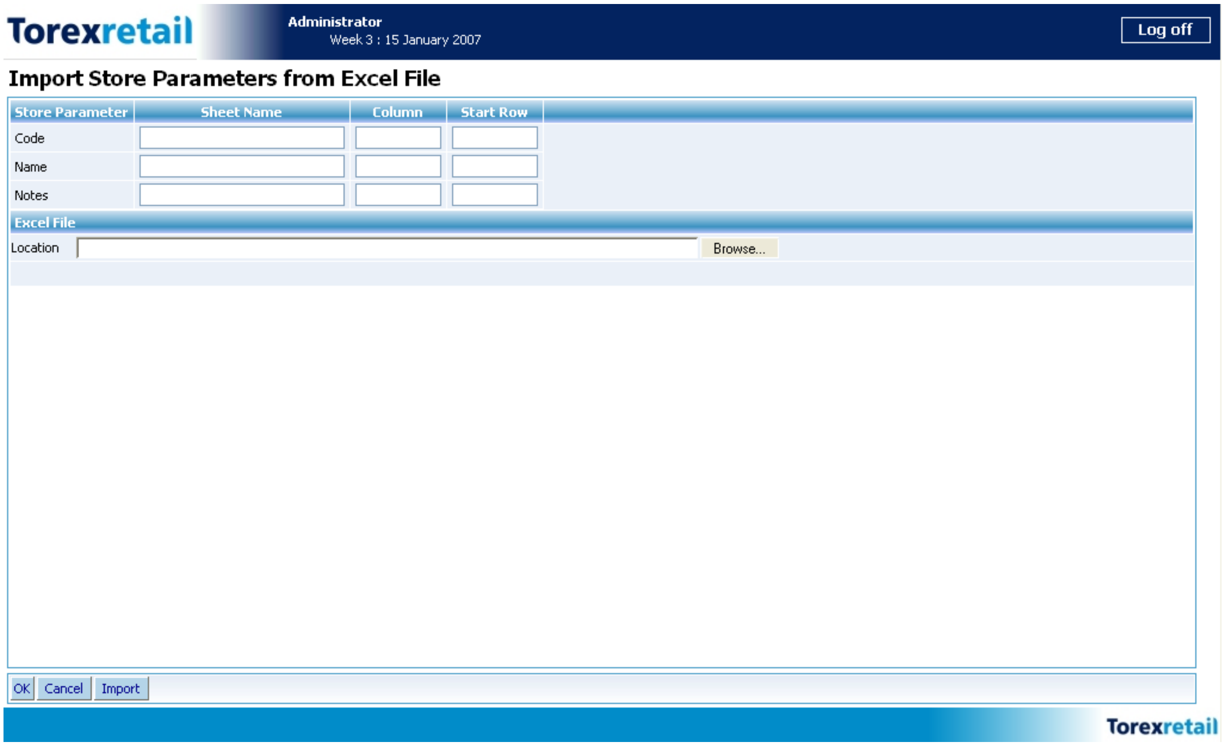
3. Click **Add New**, at the bottom of the page.

> **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.

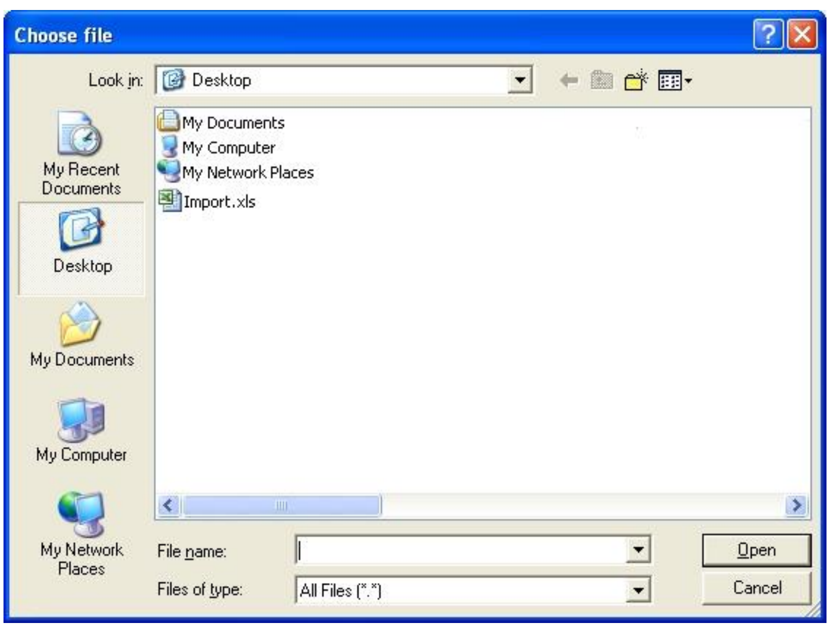
Import

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 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

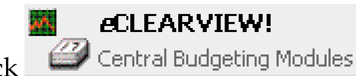
1. To edit an Item, click **Edit**.
2. Change the relevant information and click **OK** to save and continue or **Cancel** to disregard.

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.

6

eClearview!

1. To access the eClearview module, click 

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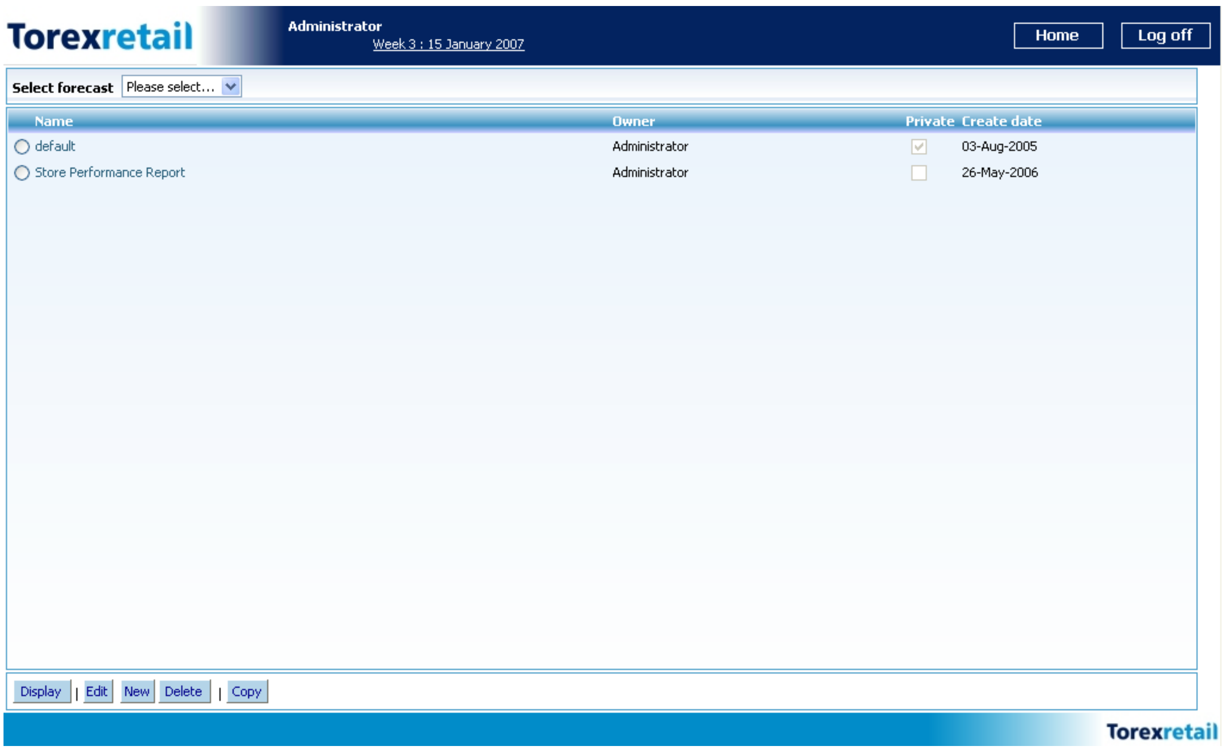
KPI Report Library

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).



Select Forecast window

1. To access the KPI Report Library, click 

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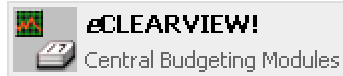
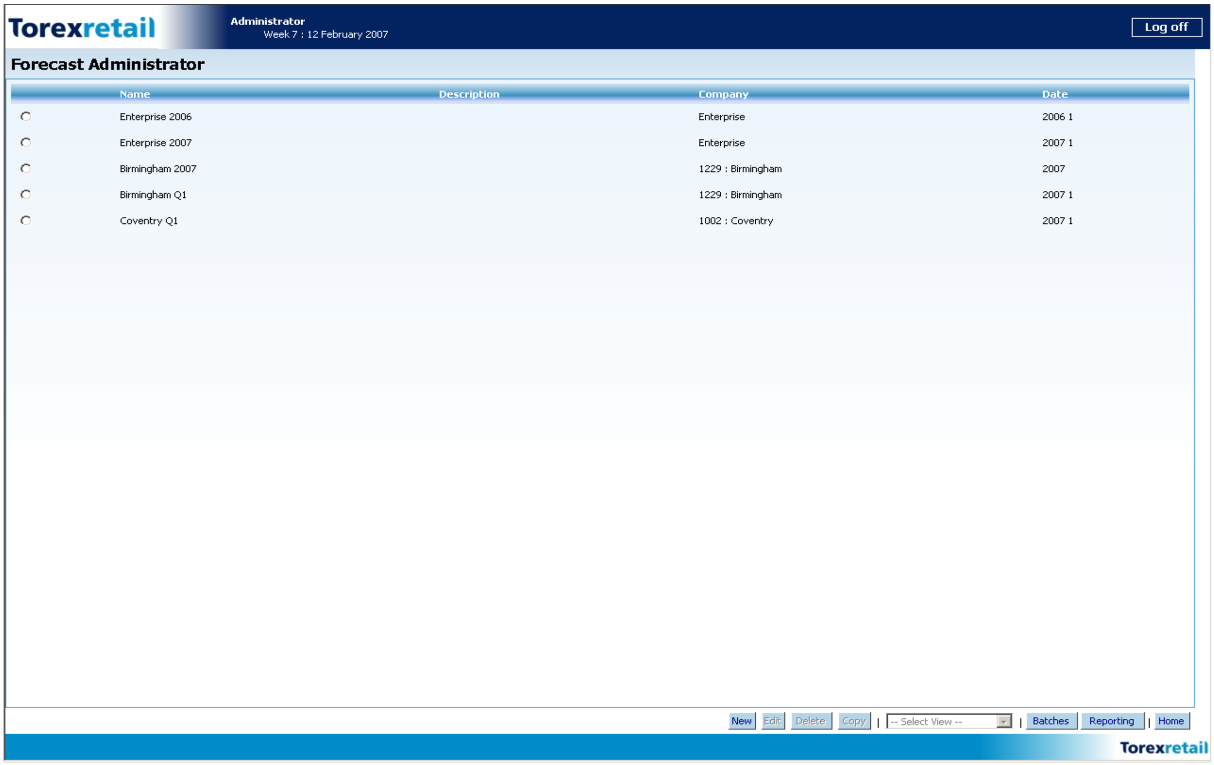
2. For more information on how this area of the system operates, see page 7 of this document.

eClearview!

1. To edit or create a new forecast, click .

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

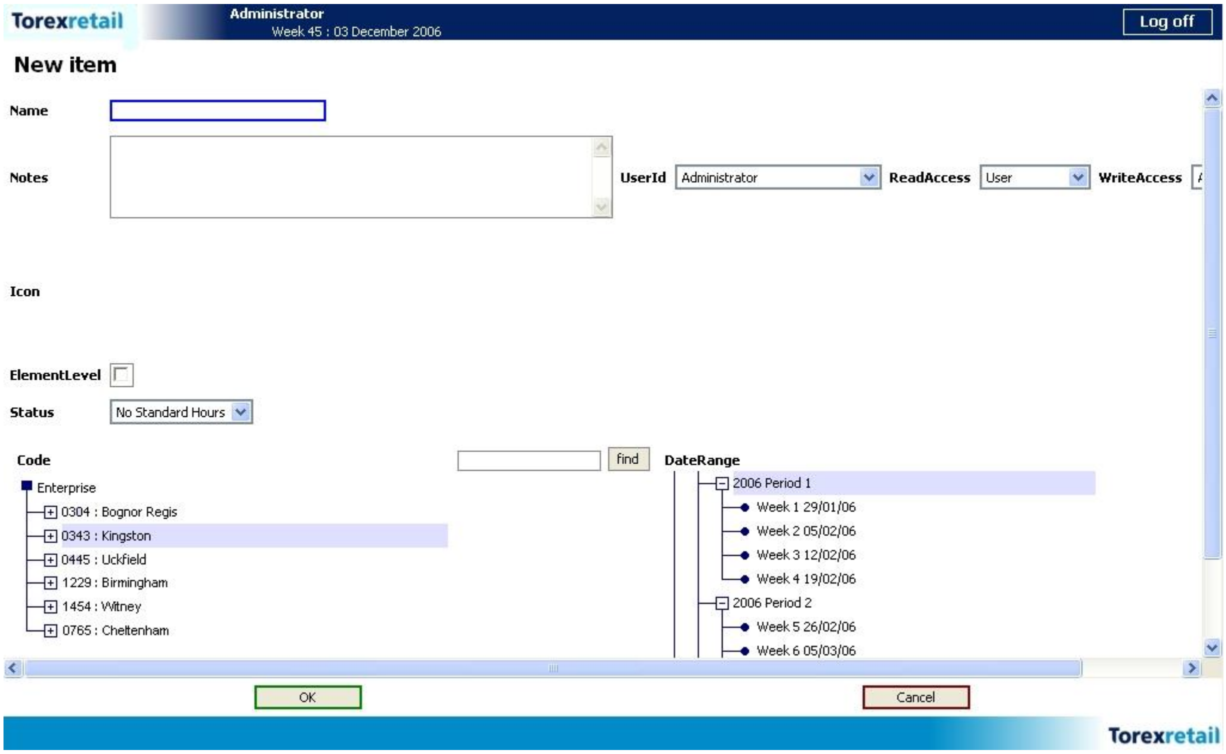


Forecast Administrator window

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:



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.

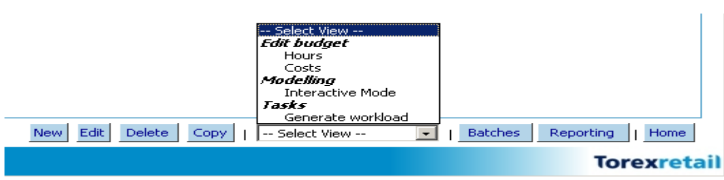
Copy a Forecast

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

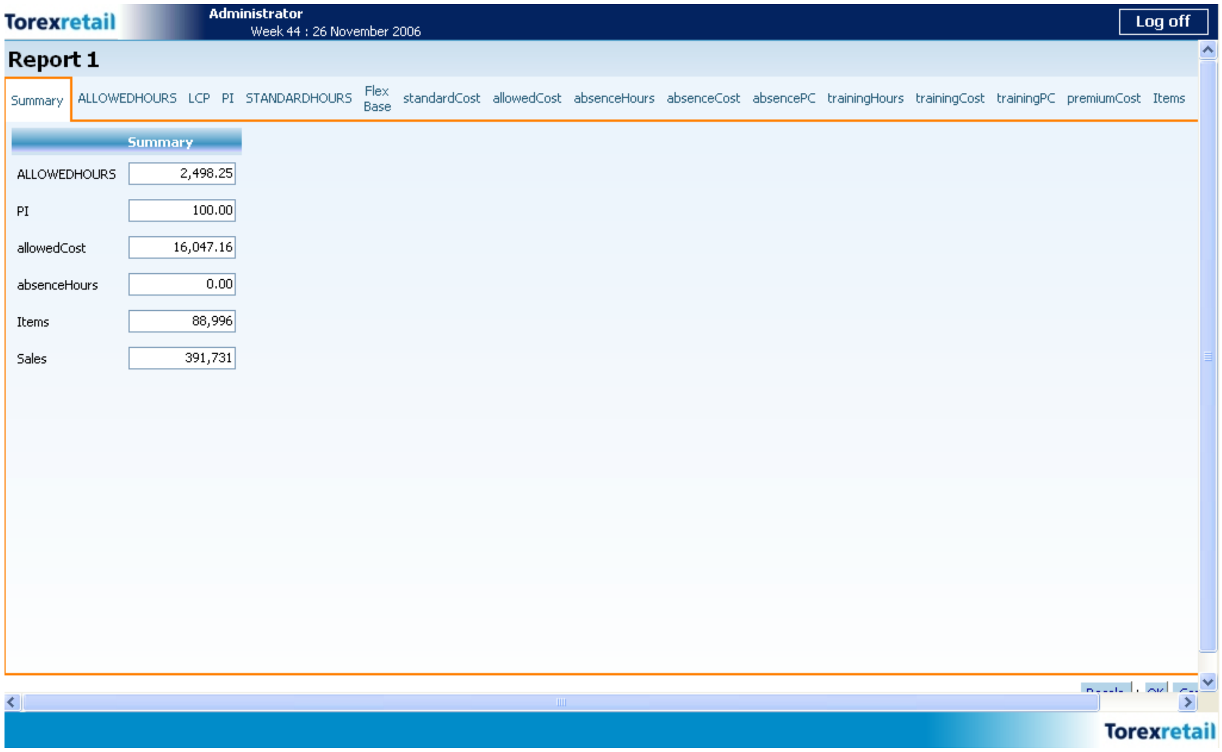
To access and edit the **Interactive Mode** information to be applied to a Forecast:

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



Interactive Mode window

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



Report window

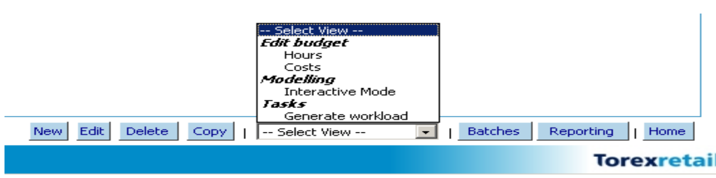
4. Click **OK** to confirm the changes and return to the Forecast screen or **Cancel** to disregard any changes.

> **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

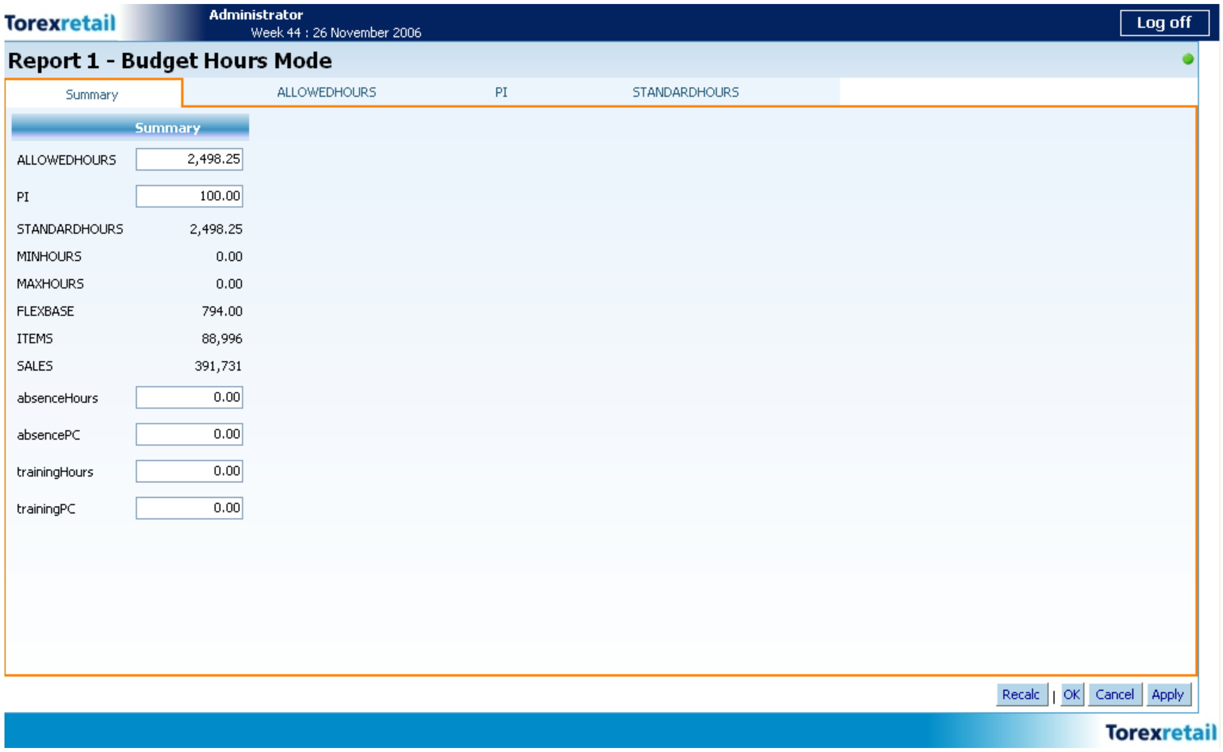
To access and edit the **Budget Hours Mode** information to be applied to a Forecast:

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



Budget Hours Mode window

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

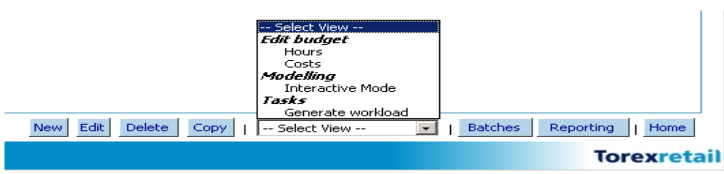


Budget Hours Mode Report window

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

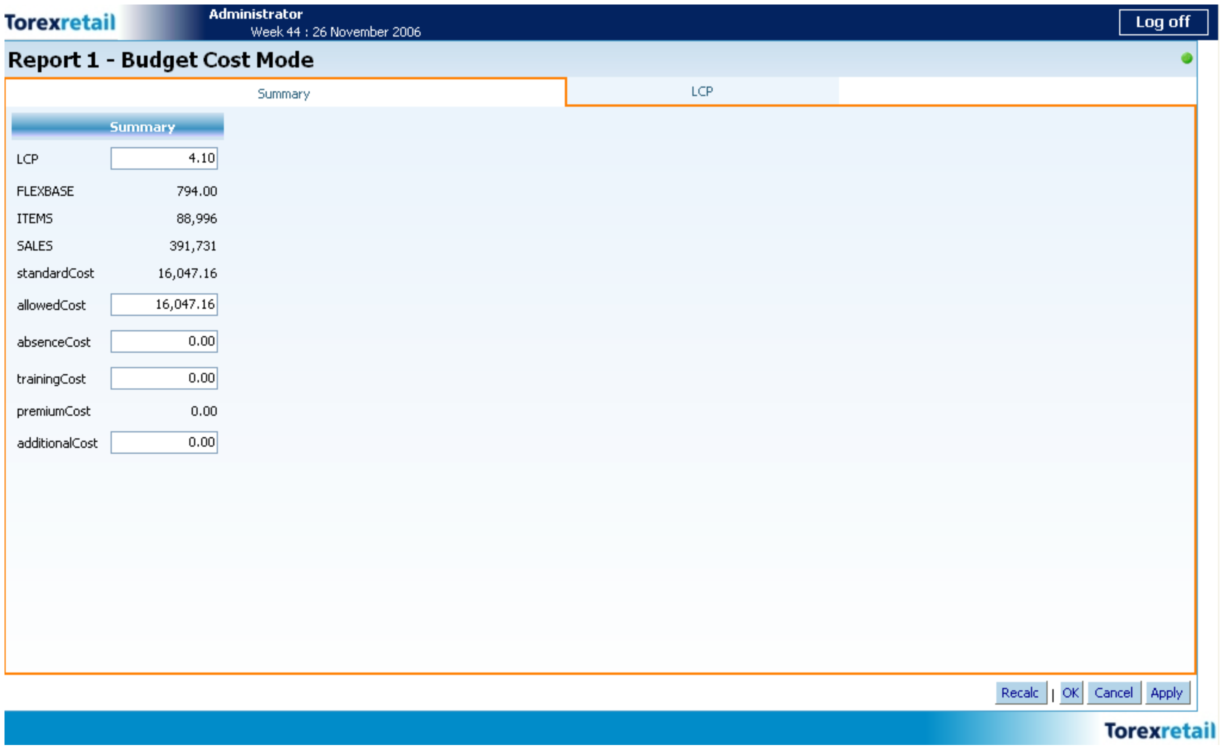
Budget Cost Mode

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



Budget Cost Mode window

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

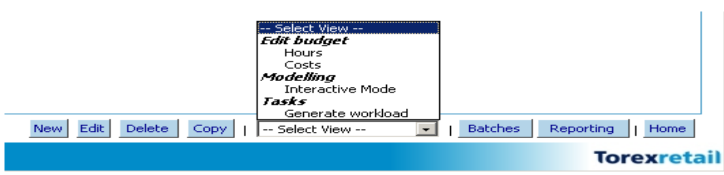


Budget Cost Mode Report window

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

Generate Workload

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



Generate Workload window

3. 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

1. 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.

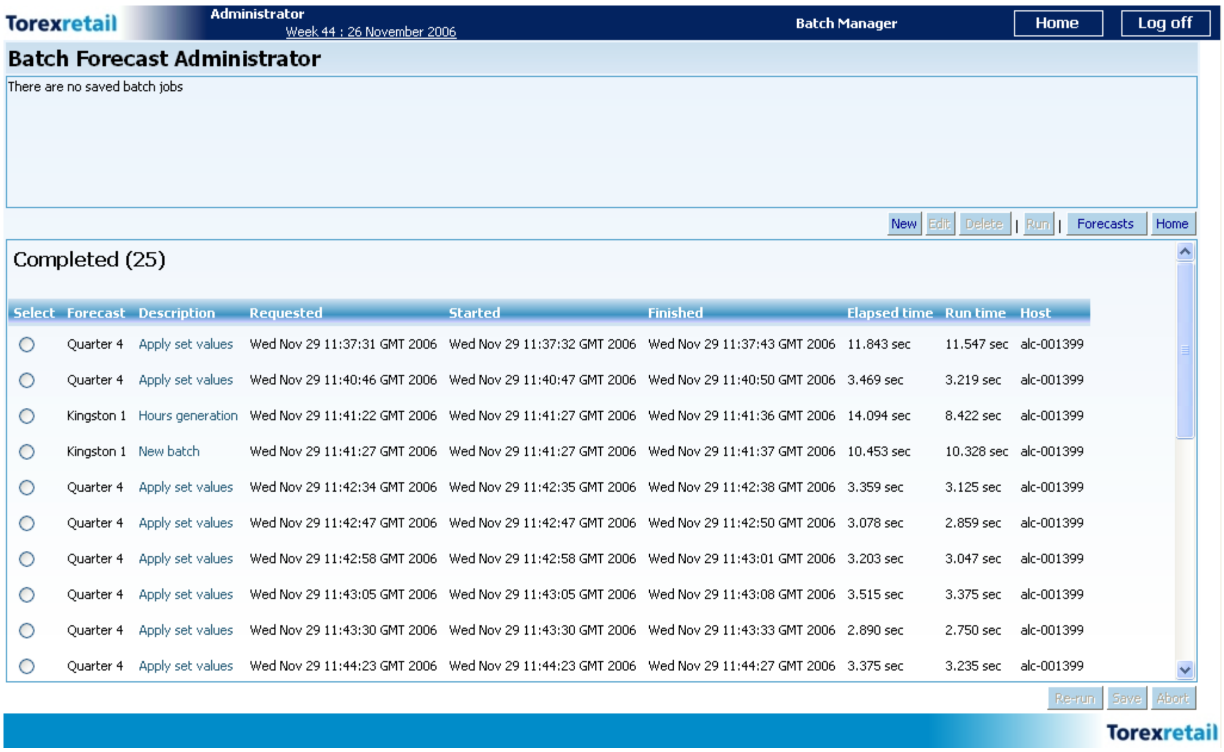
Reporting

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 

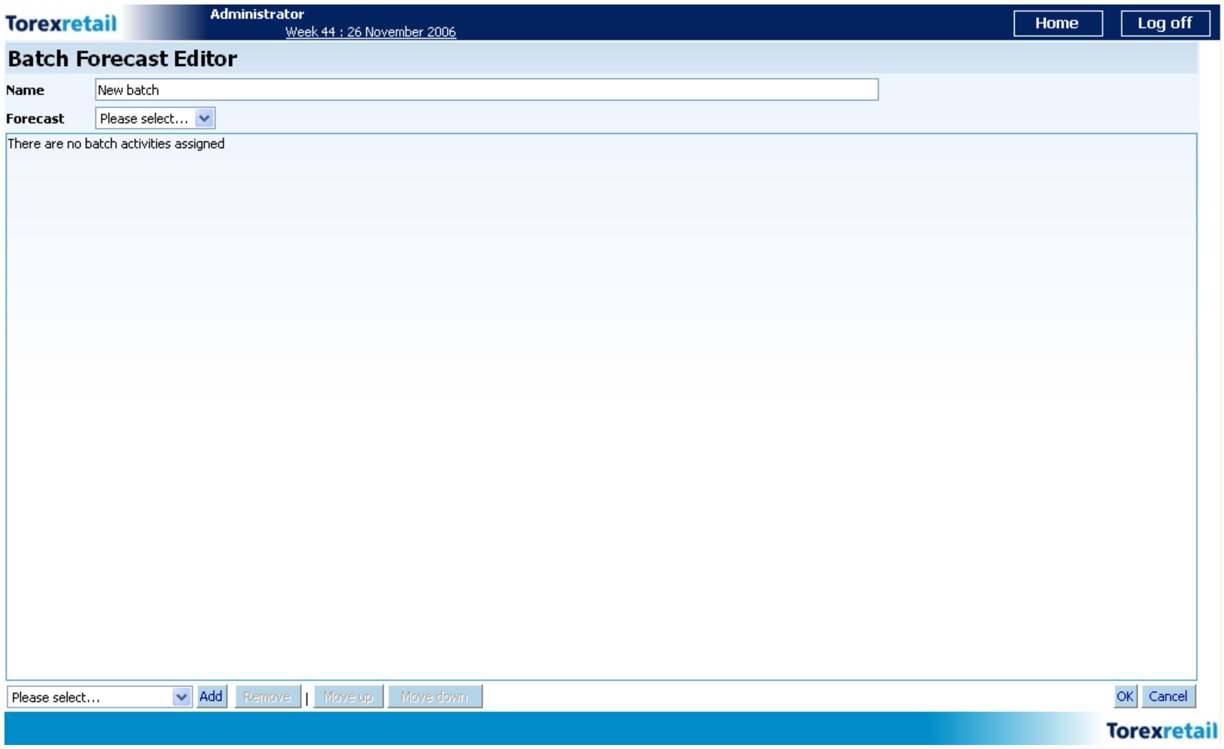
.
2. A screen, similar to that below, will be displayed:



Batch Forecast Administrator 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

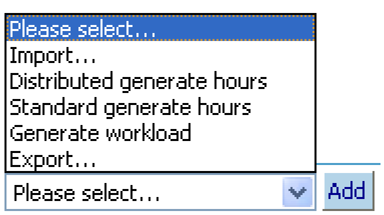
3. First, type a relevant name for this job, in the **Name** field at the top of the screen.
4. Select the appropriate **Forecast** from the list.
5. You now need to add the activities to be processed. See below.

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.

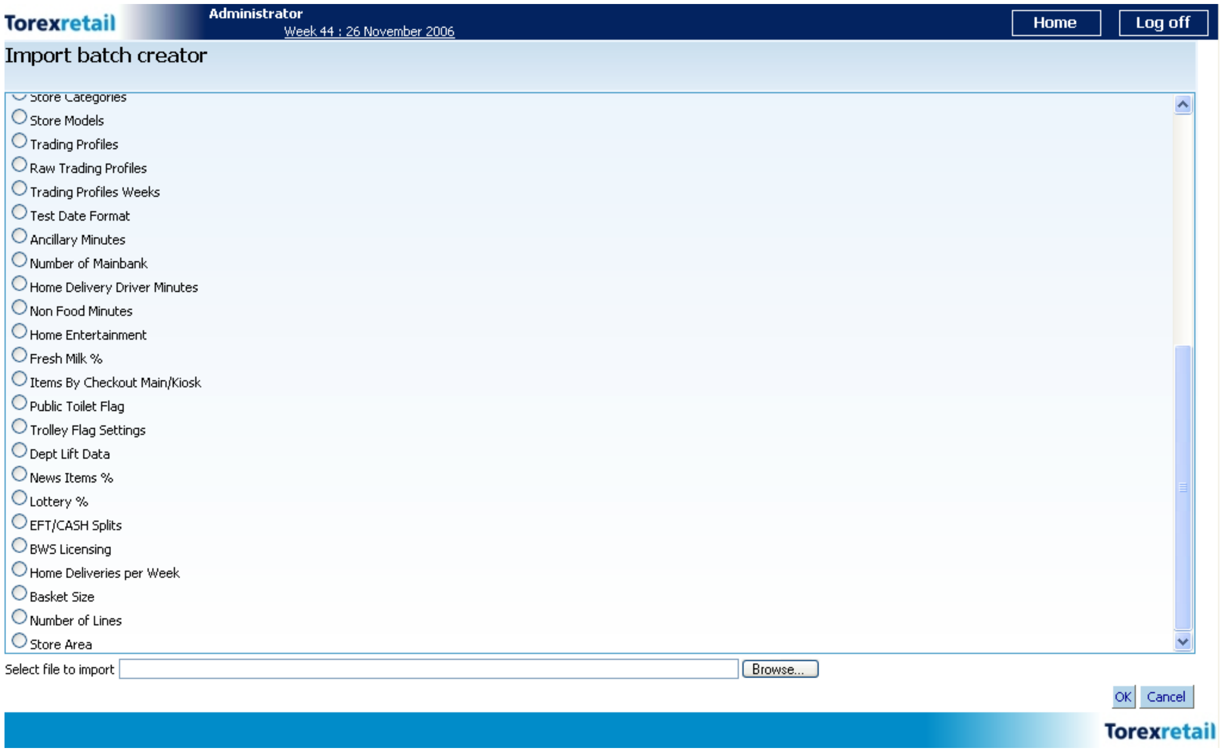
Import

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



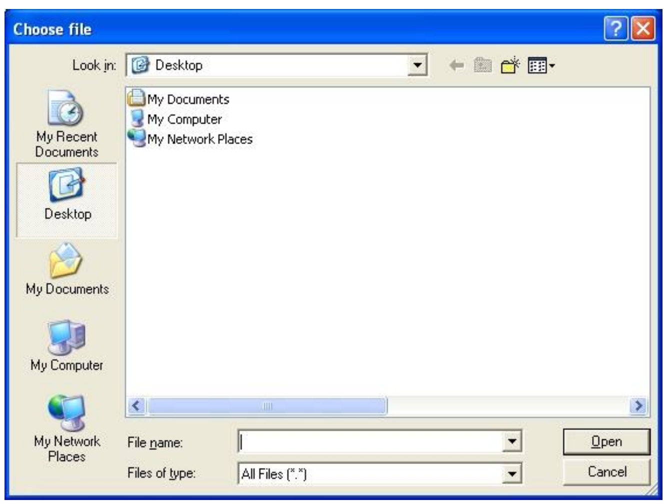
Select Import window

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.



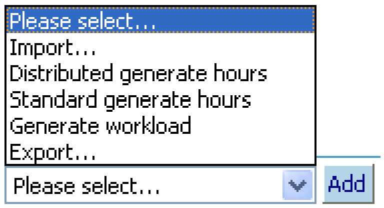
Choose File window

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.

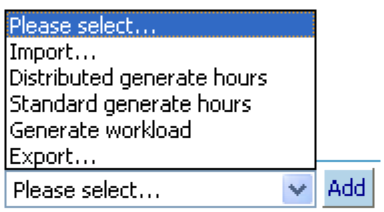


Select Import window

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.

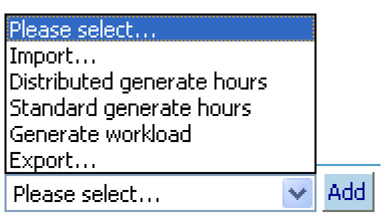


Select Import window

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.

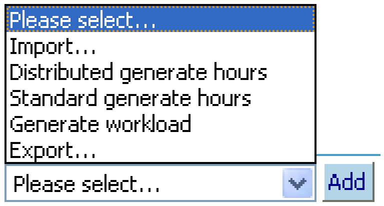


Select Import window

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

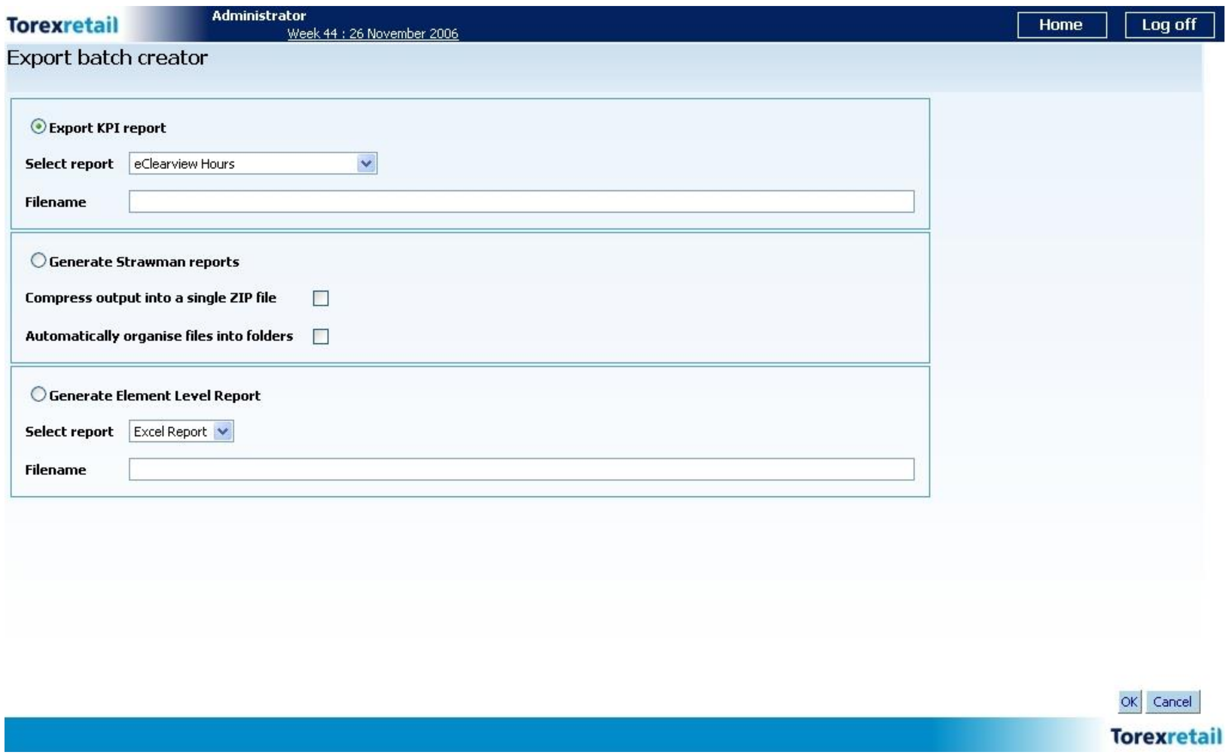
Export

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:



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.

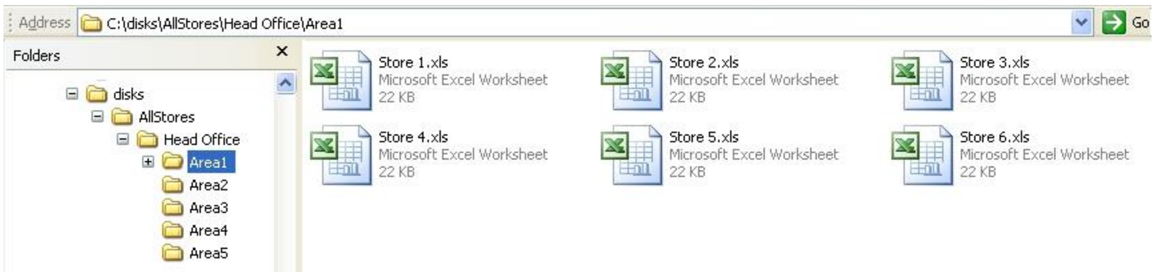
Generate Strawman Reports

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

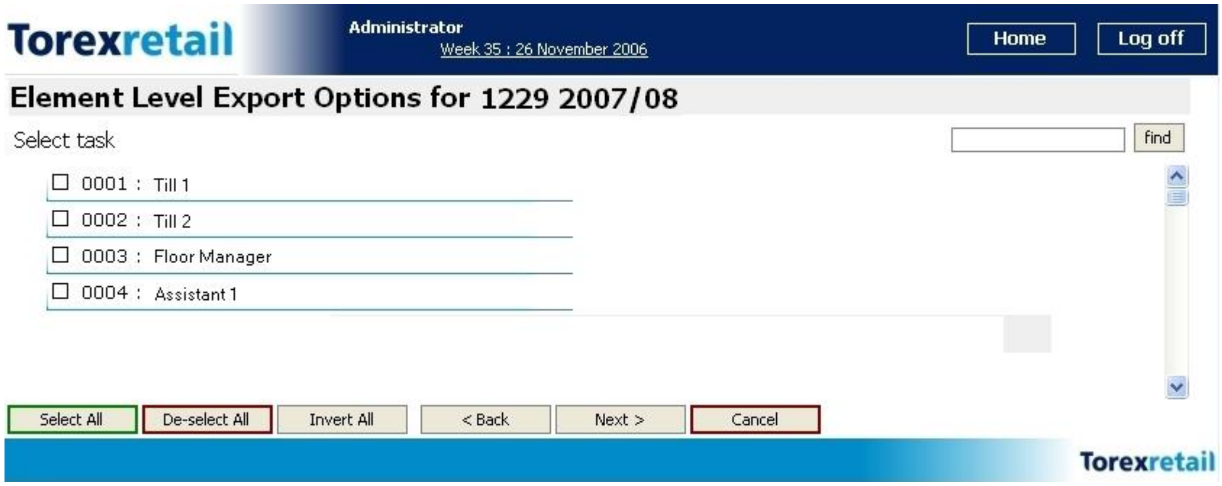
4. Once ready, click **OK** to confirm the changes or **Cancel** to disregard any actions.

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 window

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

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

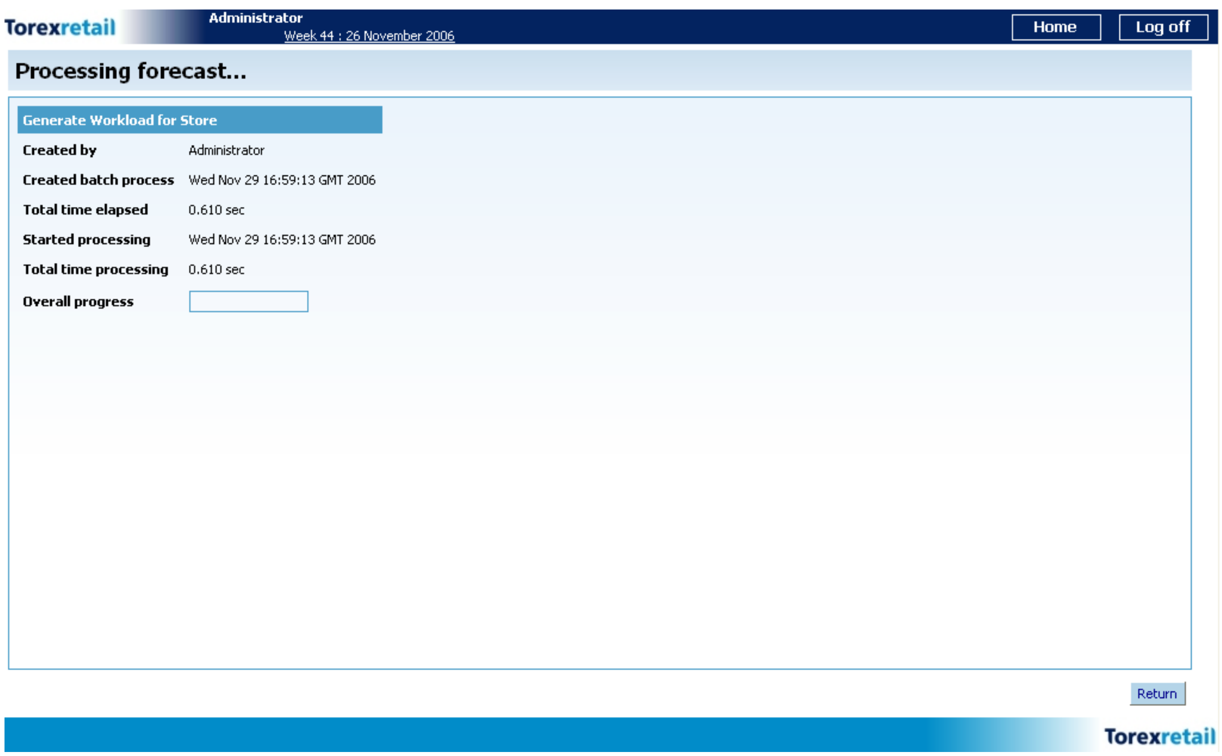
1. To edit a Batch Job, click in the circular to the left of the relevant Job.
2. Click **Edit**.
3. You are now able to **Add**, **Remove** or **Move** the Activities in the list.

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**.

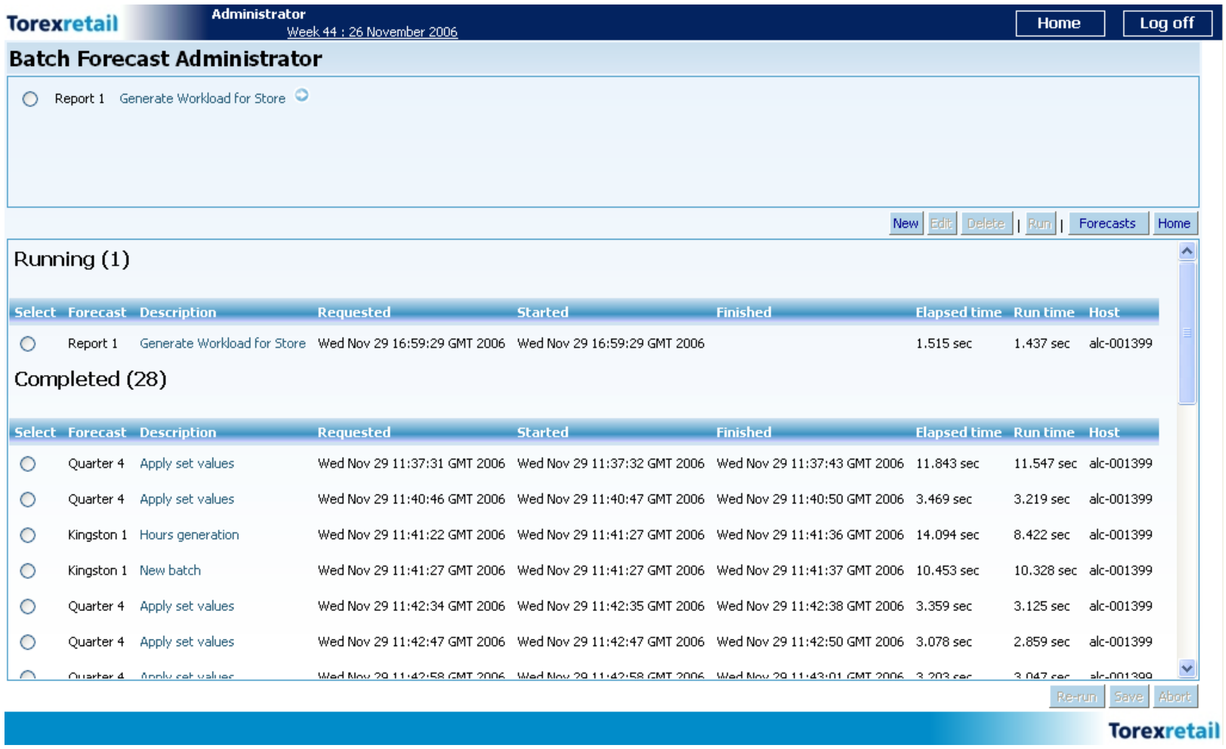
Run a Batch Job

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:



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**.



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

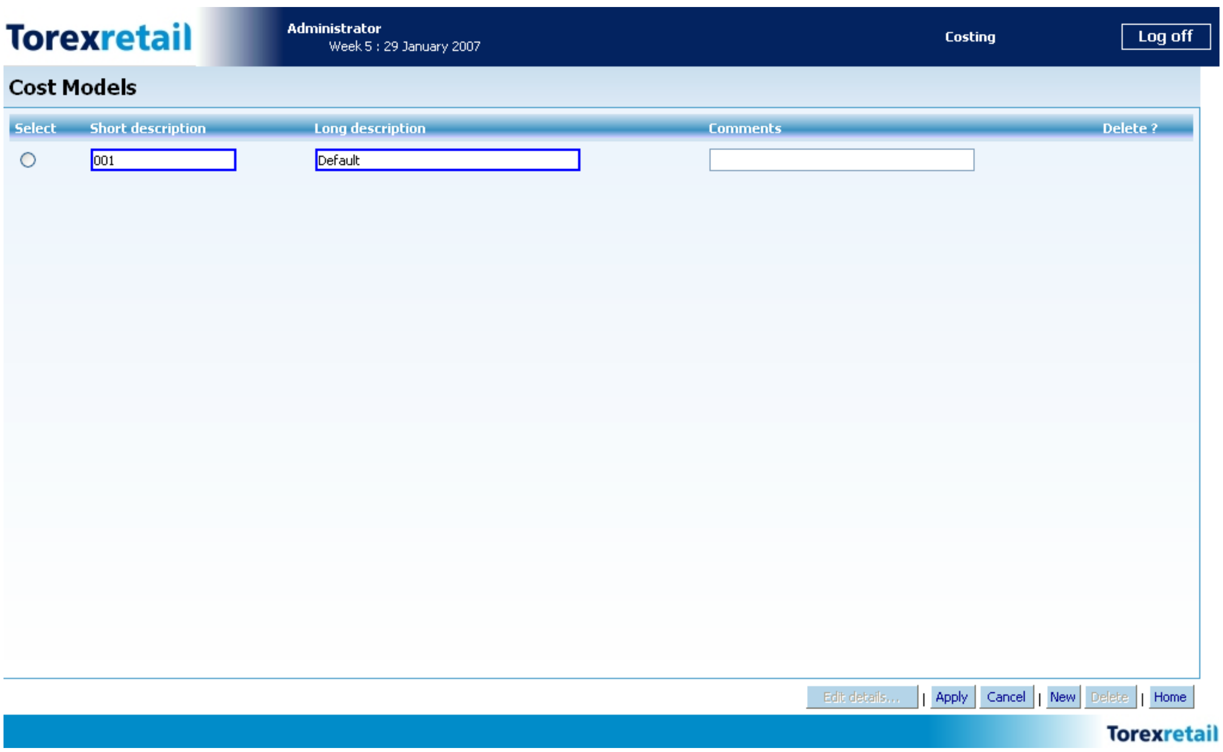
1. To view the Models, click 

.
2. More information on using the Models screen can be found on page 67.

Costing

1. To view the Costing information, click 

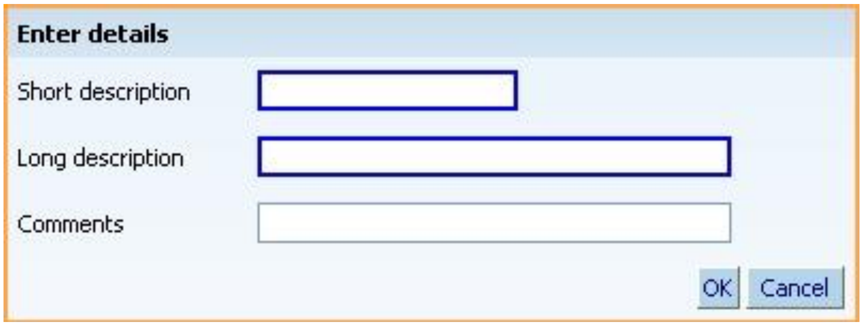
.
2. A screen, similar to that below, will be displayed:



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:



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.

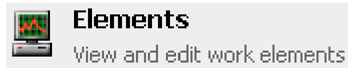
Delete a Costing Model

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:

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

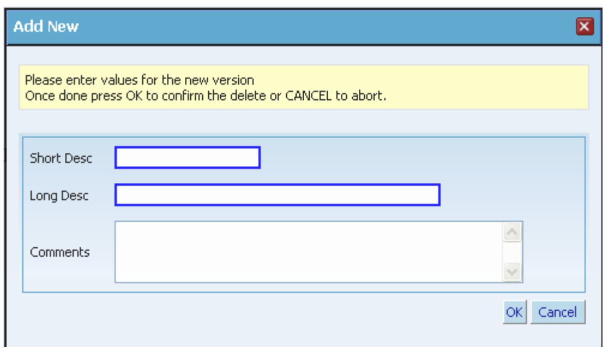
To access the Commodity Group Version section:

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

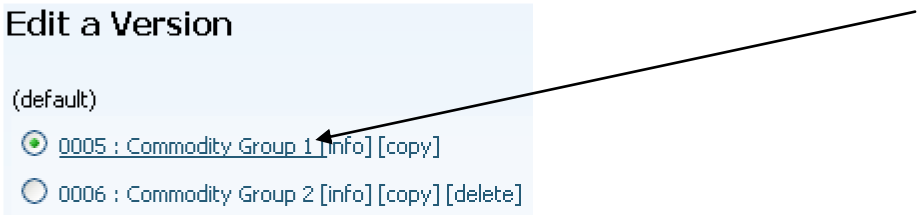
3. Enter the Short Desc, Long Desc and Comments, if applicable.
4. Once complete, click on OK to continue or Cancel to return to the previous screen.

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 window

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

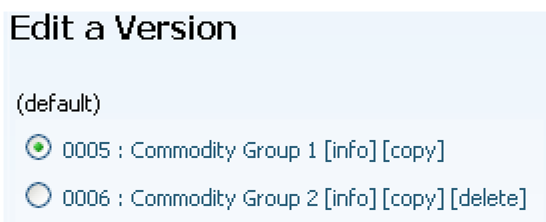
Error! Objects cannot be created from editing field codes.

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,



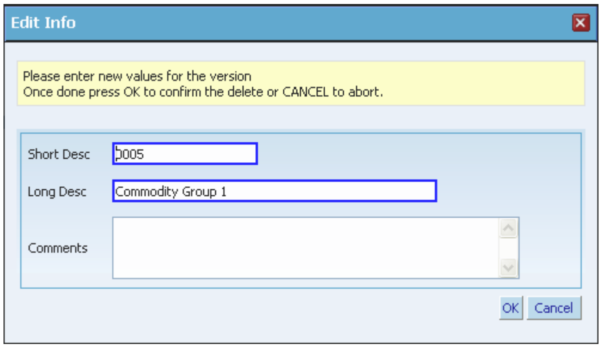
Edit a Version window

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:



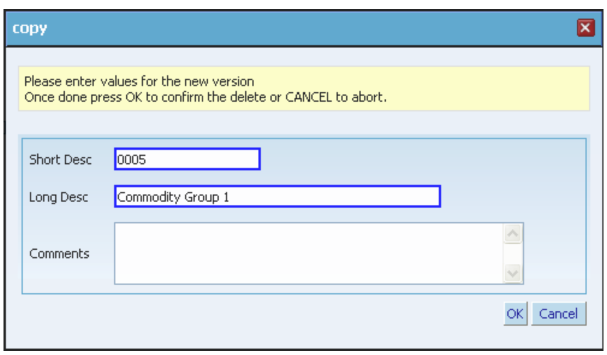
Edit Info window

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:



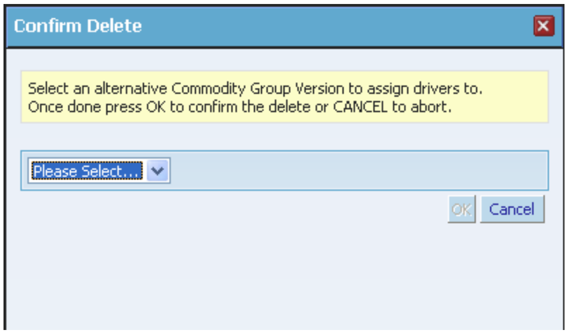
Copy window

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:

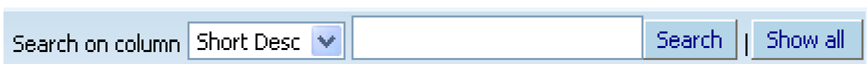
1. Click **Add New**. A screen, similar to that below, will be displayed:

Add New Commodity Groups

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:

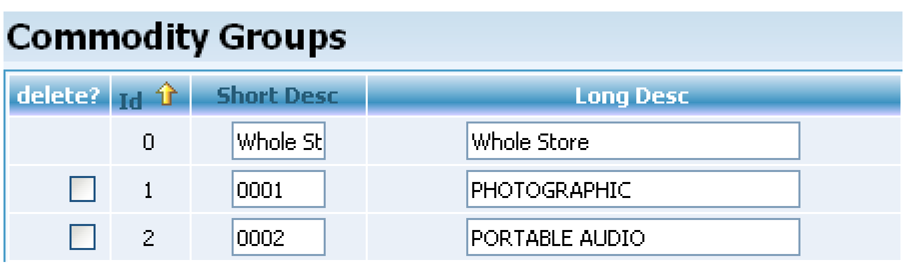


Search on Column window

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 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

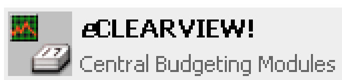
This screen allows you to assign the relevant **Commodity Group Version** to a **Driver**. For each **Driver** there are 2 hierarchy settings:

- 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:

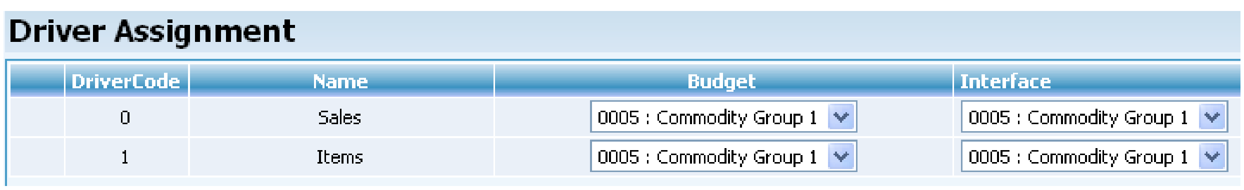
1. Log into the software as usual.
2. Click 

.
3. Then click 

.

Assigning a Commodity Group Version to a Driver

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



Driver Assignment window

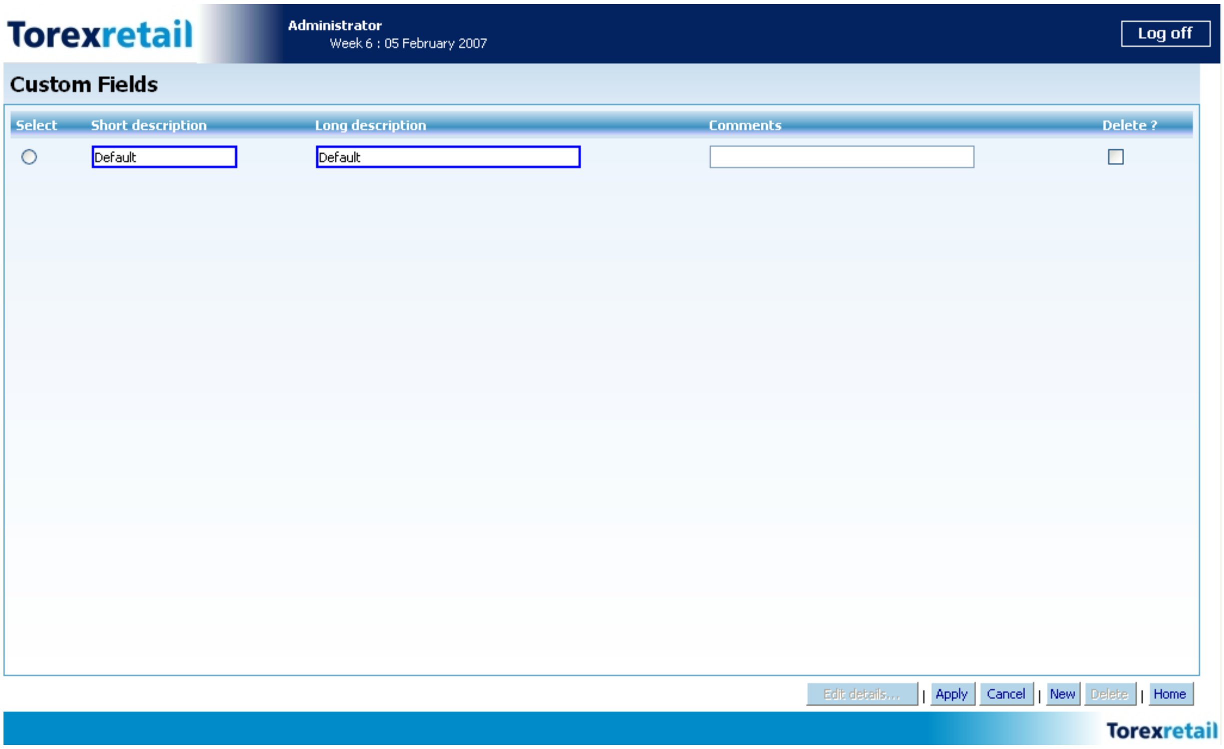
1. Click drop down menu next to the relevant **Driver**, under the headings **Budget** and **Interface**.
2. Select the appropriate **Commodity Group Version** for each and click **Apply**, at the bottom of the screen, for the settings to take effect.

> **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).

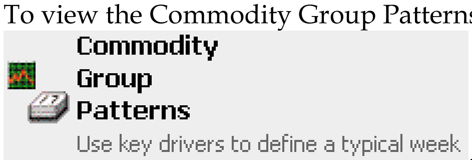
Edit a Custom Field

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

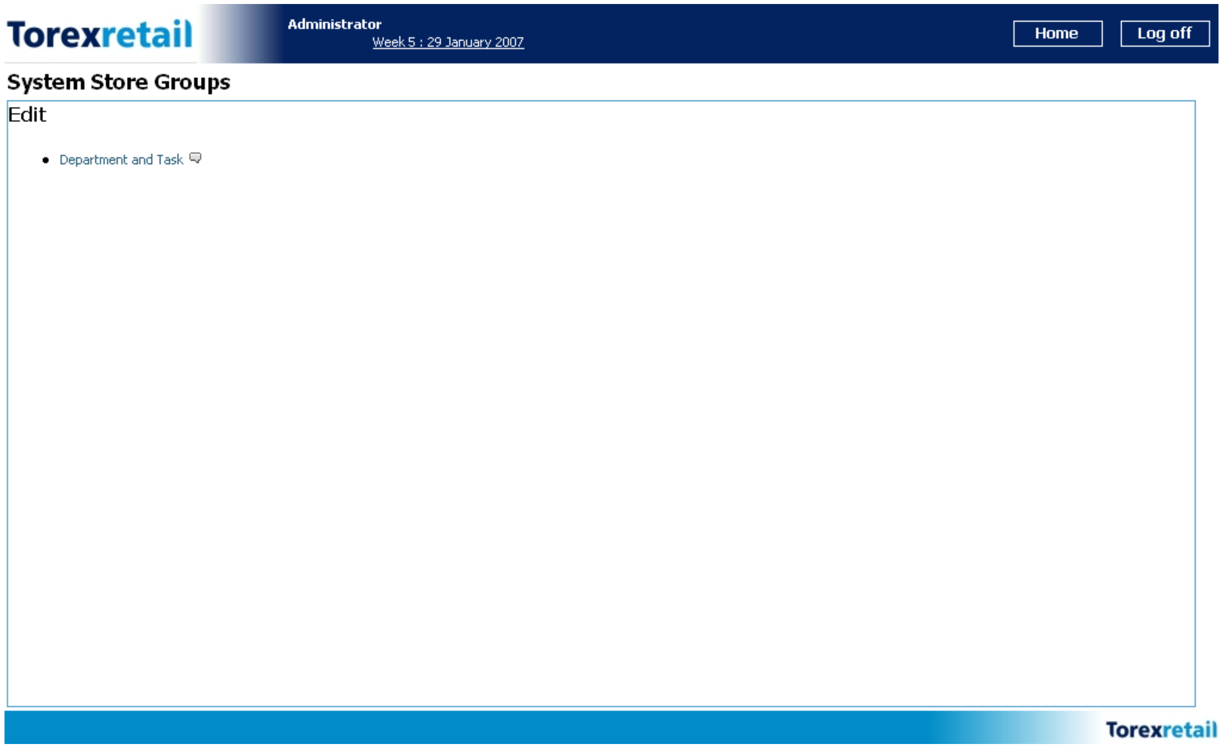
1. To view the Commodity Group Patterns, click 

.
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 window

Edit a Store Group

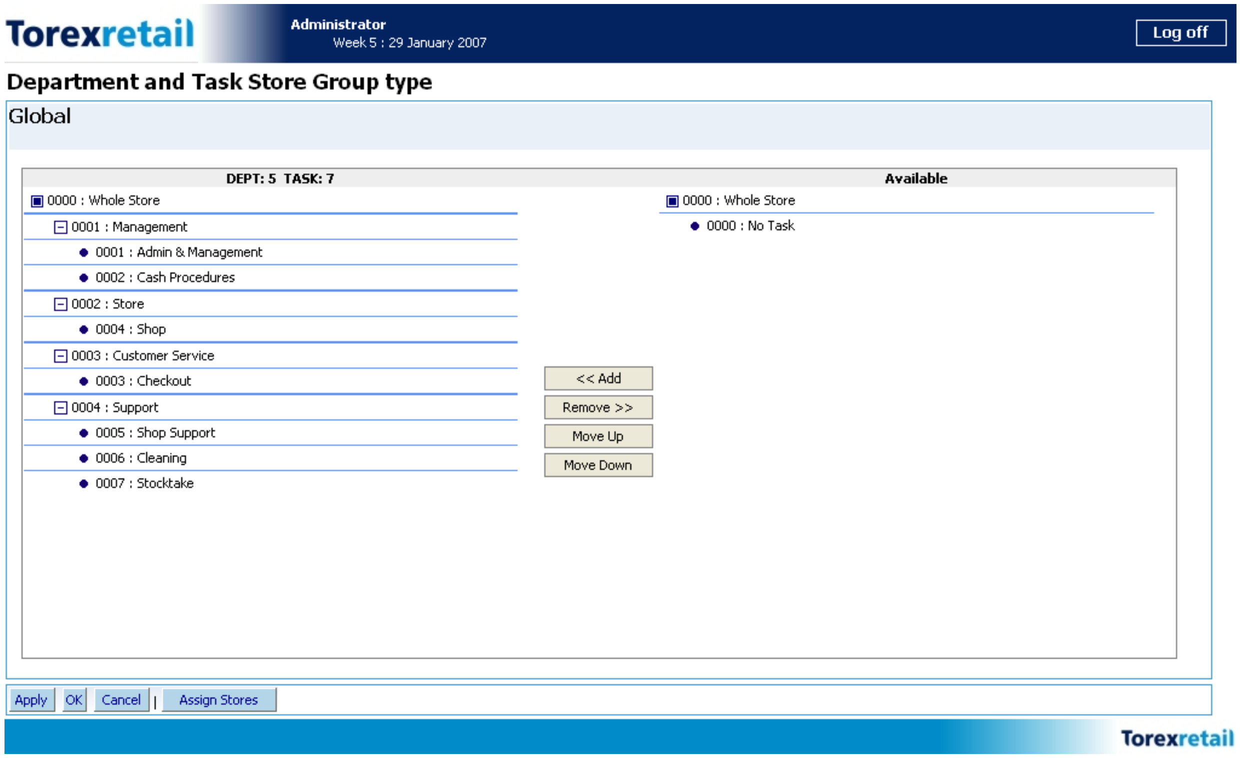
1. To edit a Store Group, click name.

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:

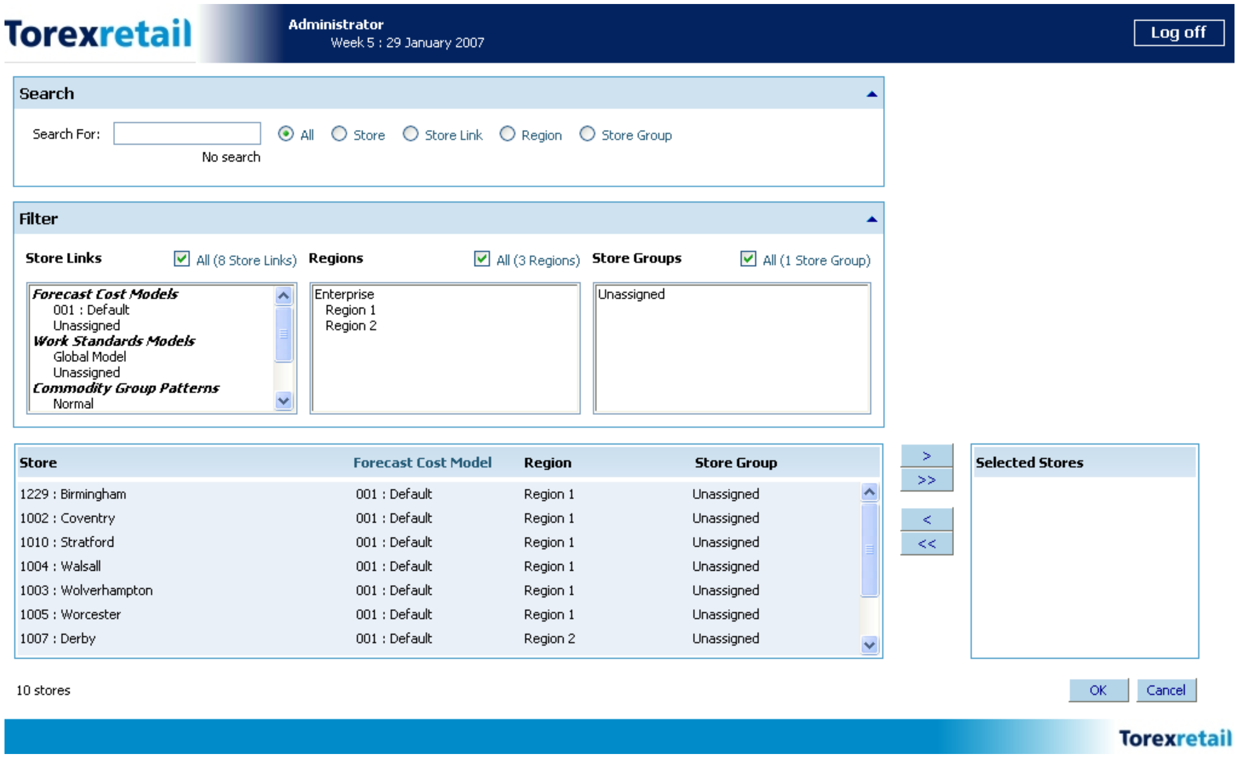


Department and Task Store Group Type window

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:



Assign a Store window

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

Rename a Type

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

Delete a Type

1. To delete a type, click icon, next to the relevant type.
2. 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

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

Store Parameters

1. To view the Store Parameters, click 

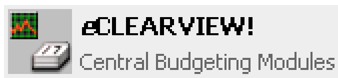
.
2. For further information on using this screen, see page 81.

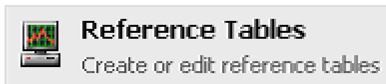
Reference Tables

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:

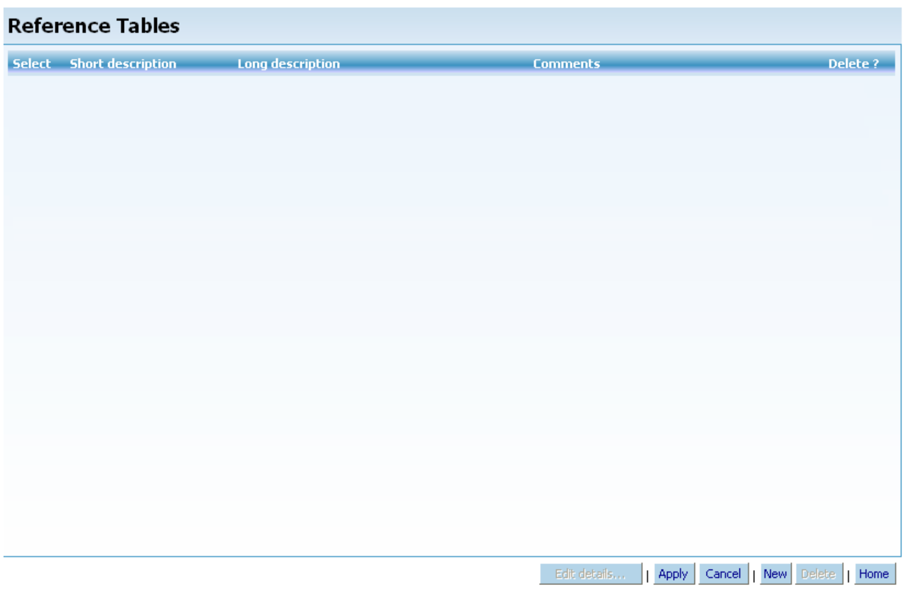
1. Log into the software as usual.
2. Click 

.
3. Then click 

.

Creating a New Table

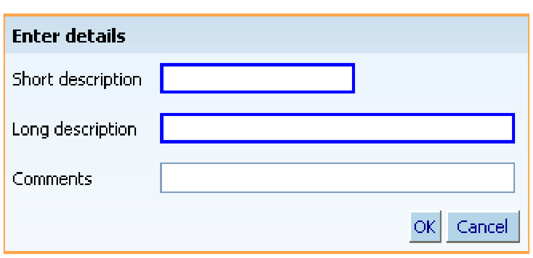
Once the **Reference Tables** area has been accessed, a screen, similar to that below, will be displayed:



Reference Tables window

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

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



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.

	Sales	Labour Cost
Level 1	0	5000
Level 2	20000	7500
Level 3	40000	10000
Level 4	60000	15000
Level 5	70000	16000

	Sales	Labour Cost
Level 1	0	5000
Level 2	20000	7500
Level 3	40000	10000
Level 4	60000	15000
Level 5	70000	16000
G		

Add a Row window

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.

	Sales	Labour Cost
Level 1	0	5000
Level 2	20000	7500
Level 3	40000	10000
Level 4	60000	15000
Level 5	70000	16000

	Sales	Labour Cost	C
Level 1	0	5000	
Level 2	20000	7500	
Level 3	40000	10000	
Level 4	60000	15000	
Level 5	70000	16000	

Add a Column window

Deleting a Row

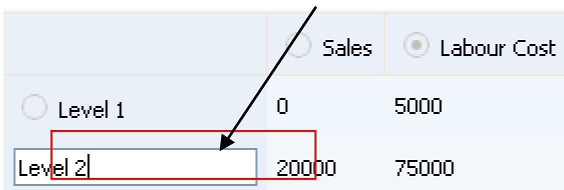
1. Click row that you want to delete.
2. Click **Delete row** at the bottom of the screen.
3. You will be asked '**<ROW NAME> Are you sure you want to delete this row?**'. If you are sure, click **OK**. Otherwise, click **Cancel**.

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,



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.

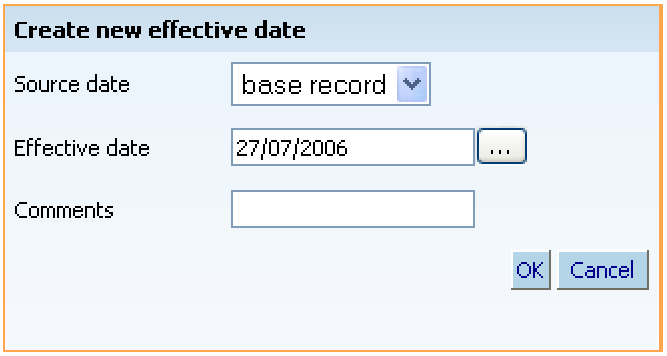
Adding Data to a Cell

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.

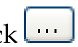
Creating an Effective Date

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:

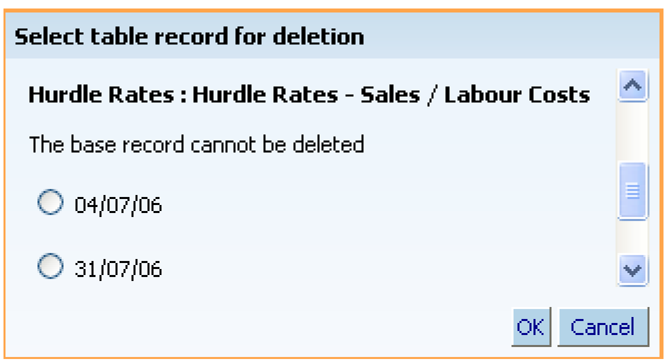


Create New Effective Date window

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:

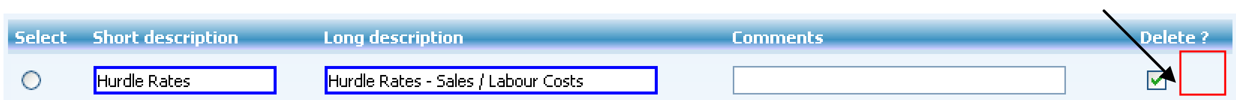
Select Table window

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

Deleting a Table

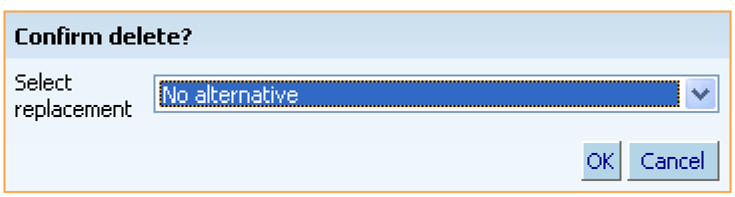
To delete a table from the list, follow the steps below:

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



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 window

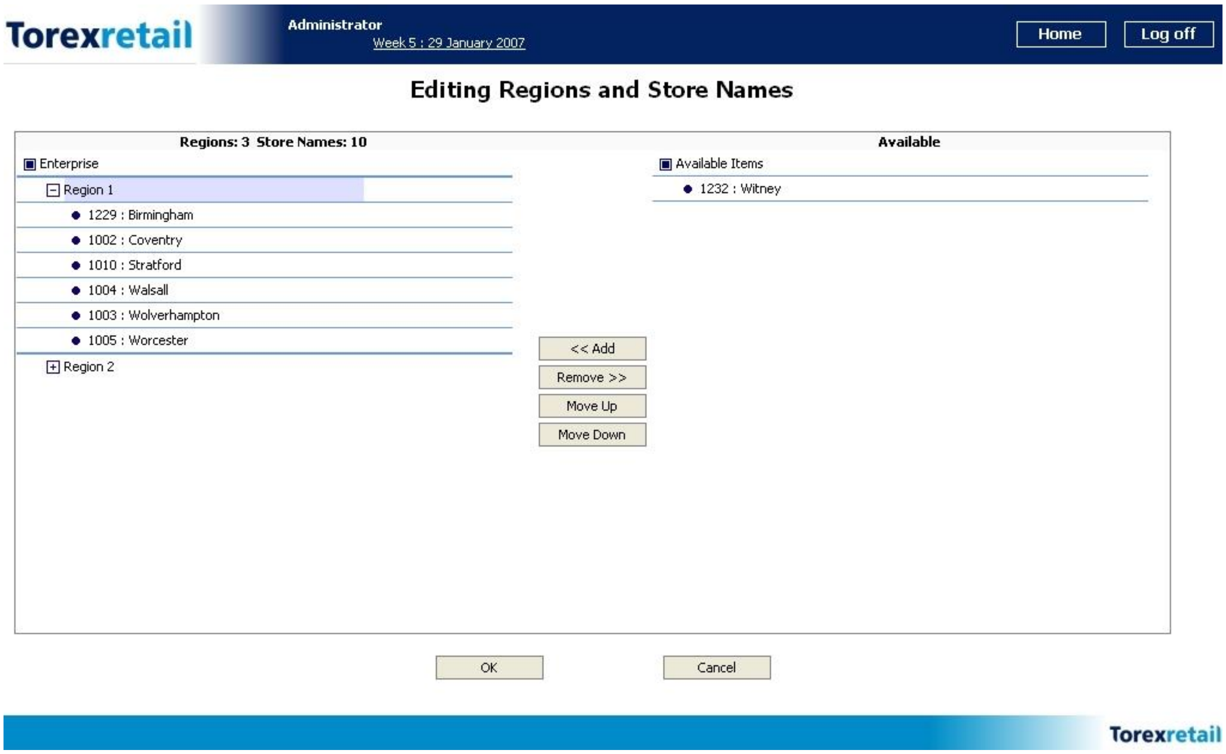
3. Either select an alternative table from the list, by clicking arrow button, left clicking table and selecting the **OK** or leave the option on its default setting, **No alternative**, and click on **OK**.

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:



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.

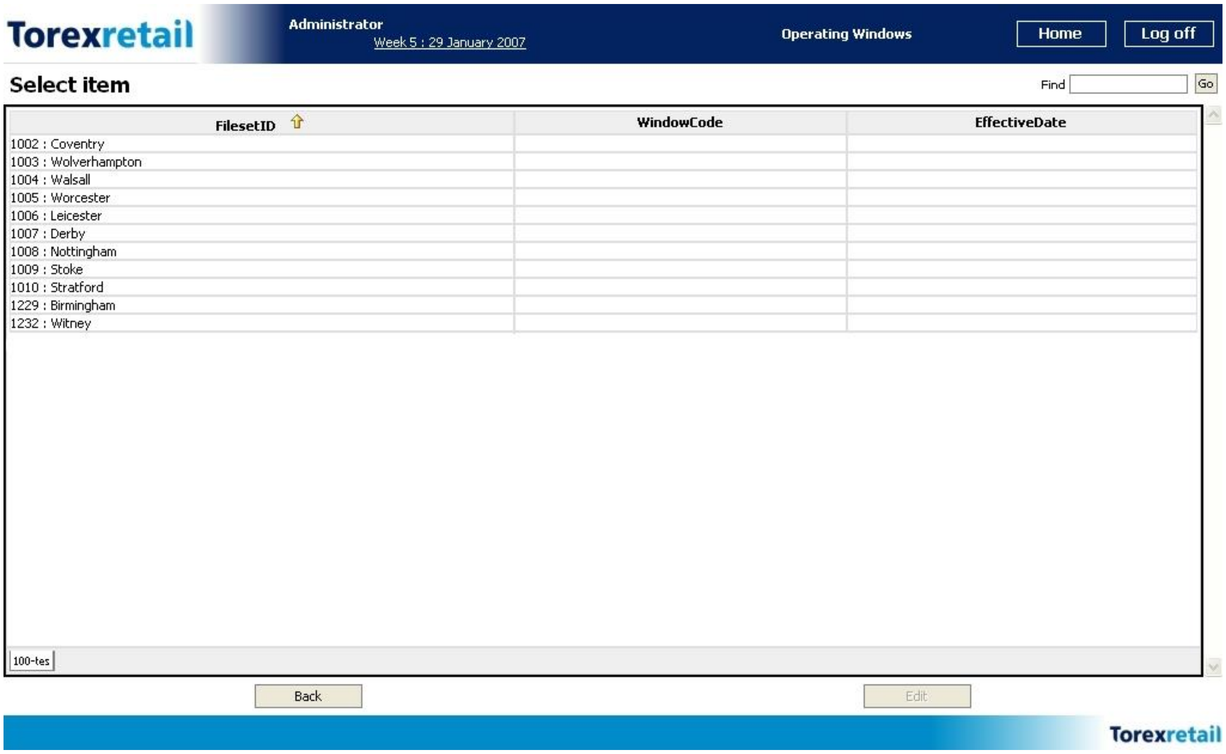
Moving a Store in a Region

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:



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

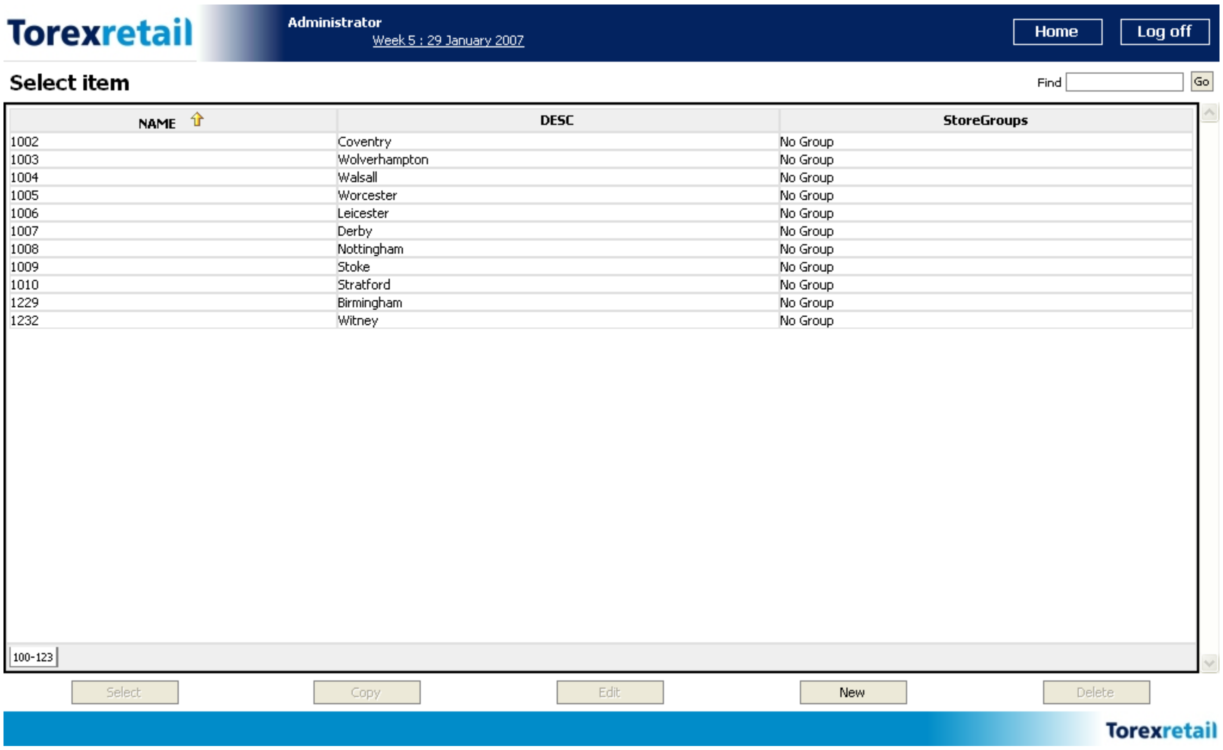
1. To edit an operational window code, click relevant store.
2. Click **Edit**.
3. Click **Edit Master List**.
4. Click relevant code and click **Edit**.
5. Make applicable changes and click **OK** to save and confirm or Cancel to disregard.

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

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



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.

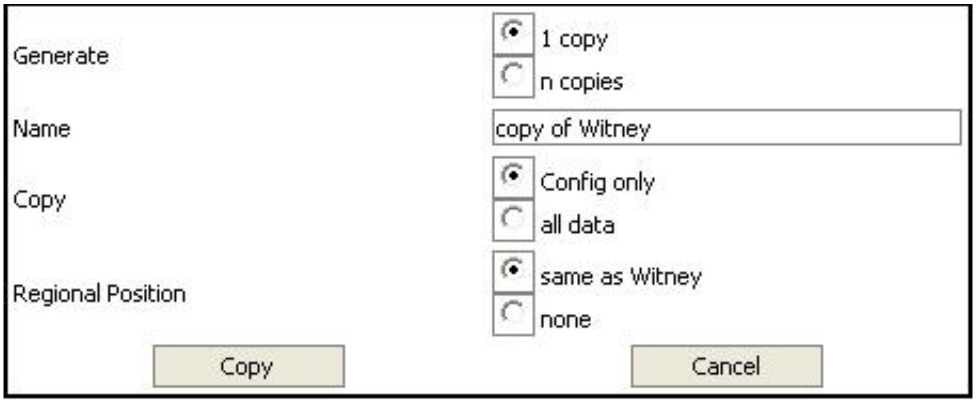
Select a Store

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:



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.

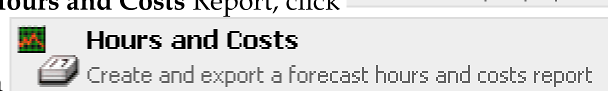
Reports

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 window

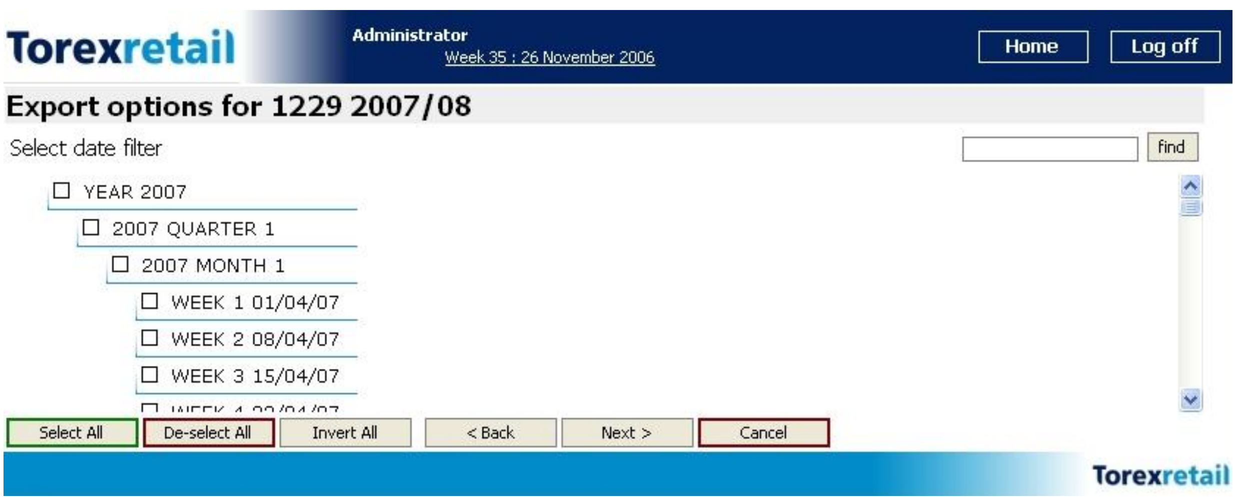
3. Choose the required Forecast from the list and then click **Select Options**.
4. You will then be prompted to select the relevant Region, Division or Store, from the list provided.

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.

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.

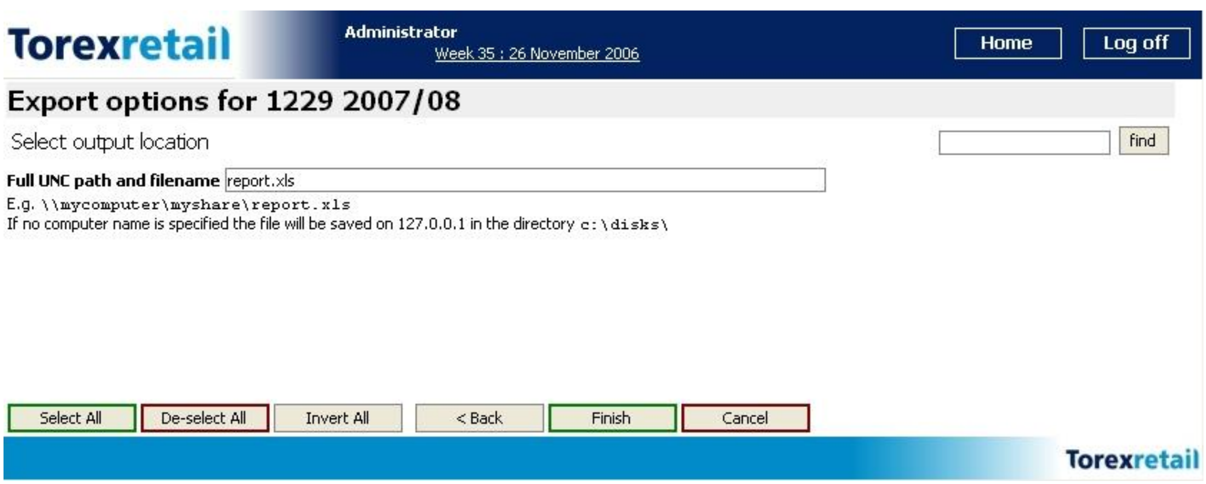
24. To tick all of the fields in the list, click **Select All**, at the bottom of the screen.

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

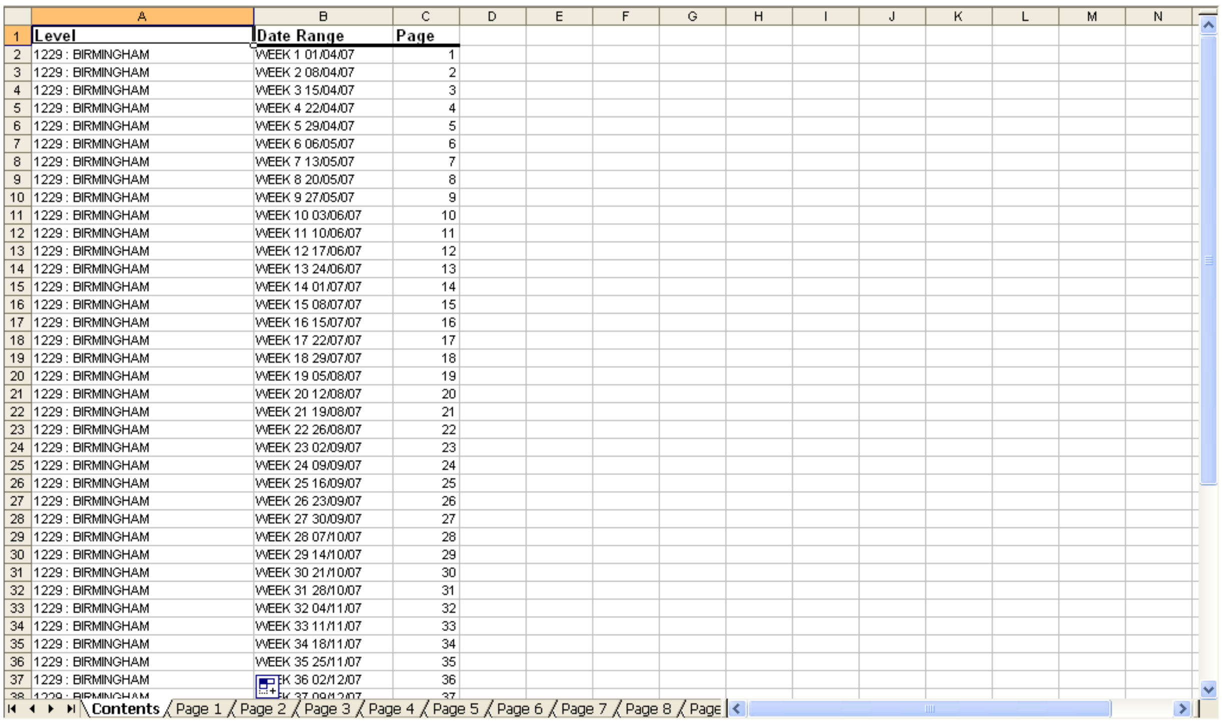
29. The filename **report.xls** will be set as the default name for this report. To change this, click into the field, delete the current name and type a new name.

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:



Level	Date Range	Page
1229 : BIRMINGHAM	WEEK 1 01/04/07	1
1229 : BIRMINGHAM	WEEK 2 08/04/07	2
1229 : BIRMINGHAM	WEEK 3 15/04/07	3
1229 : BIRMINGHAM	WEEK 4 22/04/07	4
1229 : BIRMINGHAM	WEEK 5 29/04/07	5
1229 : BIRMINGHAM	WEEK 6 06/05/07	6
1229 : BIRMINGHAM	WEEK 7 13/05/07	7
1229 : BIRMINGHAM	WEEK 8 20/05/07	8
1229 : BIRMINGHAM	WEEK 9 27/05/07	9
1229 : BIRMINGHAM	WEEK 10 03/06/07	10
1229 : BIRMINGHAM	WEEK 11 10/06/07	11
1229 : BIRMINGHAM	WEEK 12 17/06/07	12
1229 : BIRMINGHAM	WEEK 13 24/06/07	13
1229 : BIRMINGHAM	WEEK 14 01/07/07	14
1229 : BIRMINGHAM	WEEK 15 08/07/07	15
1229 : BIRMINGHAM	WEEK 16 15/07/07	16
1229 : BIRMINGHAM	WEEK 17 22/07/07	17
1229 : BIRMINGHAM	WEEK 18 29/07/07	18
1229 : BIRMINGHAM	WEEK 19 05/08/07	19
1229 : BIRMINGHAM	WEEK 20 12/08/07	20
1229 : BIRMINGHAM	WEEK 21 19/08/07	21
1229 : BIRMINGHAM	WEEK 22 26/08/07	22
1229 : BIRMINGHAM	WEEK 23 02/09/07	23
1229 : BIRMINGHAM	WEEK 24 09/09/07	24
1229 : BIRMINGHAM	WEEK 25 16/09/07	25
1229 : BIRMINGHAM	WEEK 26 23/09/07	26
1229 : BIRMINGHAM	WEEK 27 30/09/07	27
1229 : BIRMINGHAM	WEEK 28 07/10/07	28
1229 : BIRMINGHAM	WEEK 29 14/10/07	29
1229 : BIRMINGHAM	WEEK 30 21/10/07	30
1229 : BIRMINGHAM	WEEK 31 28/10/07	31
1229 : BIRMINGHAM	WEEK 32 04/11/07	32
1229 : BIRMINGHAM	WEEK 33 11/11/07	33
1229 : BIRMINGHAM	WEEK 34 18/11/07	34
1229 : BIRMINGHAM	WEEK 35 25/11/07	35
1229 : BIRMINGHAM	K 36 02/12/07	36

Viewing the Report window

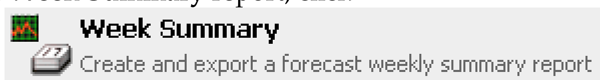
4. The Region, Department and Store information is displayed in the first column (**Level**).
5. The **Date Range** shows the dates selected in the Forecast.
6. **Page**, indicates the tab that the information can be located on for example, Page 1 etc at the bottom of the screen.
7. Clicking **Page 1**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

menu and then the 

.
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.

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.

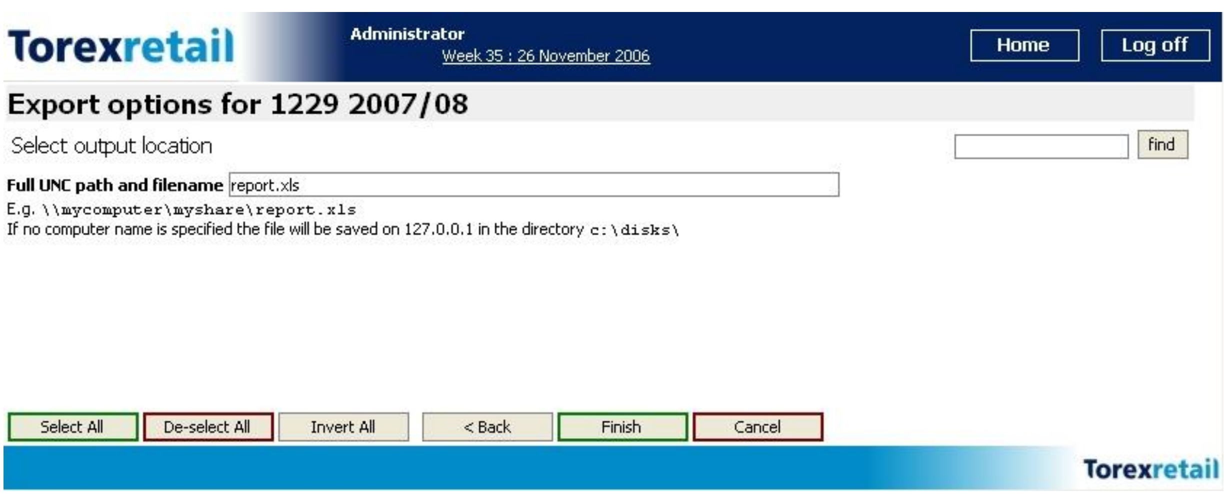
Export Options window

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. 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?



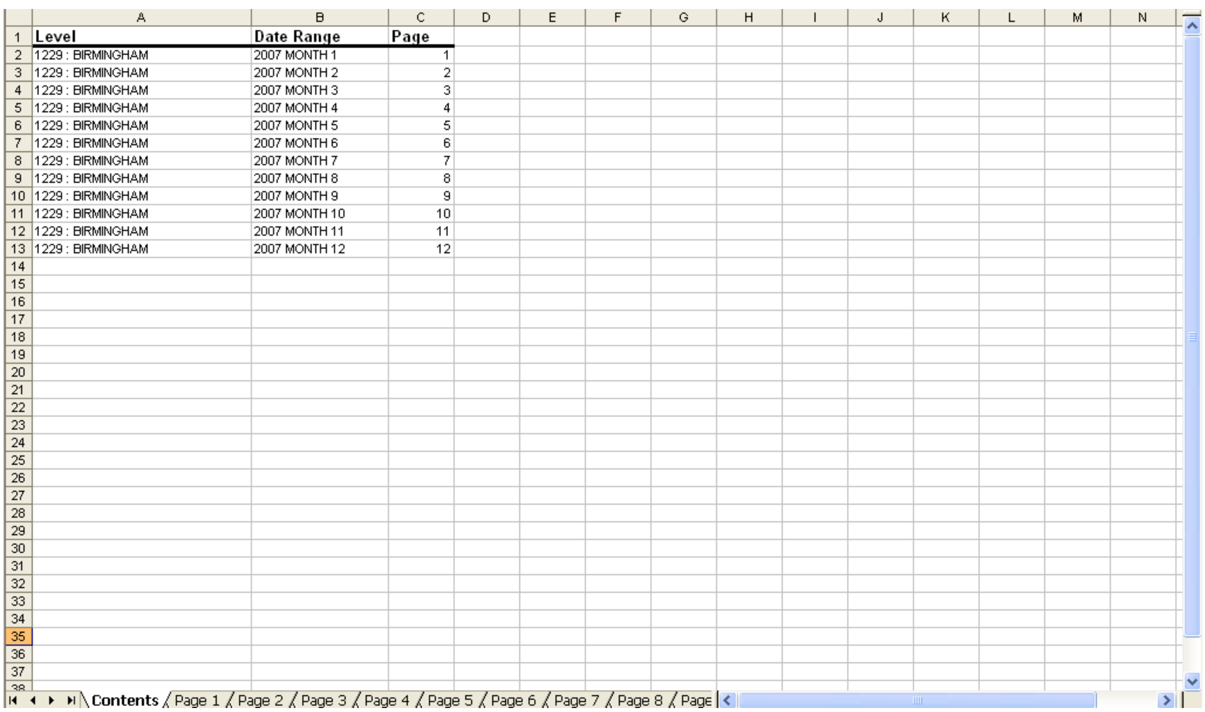
Export Options window

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

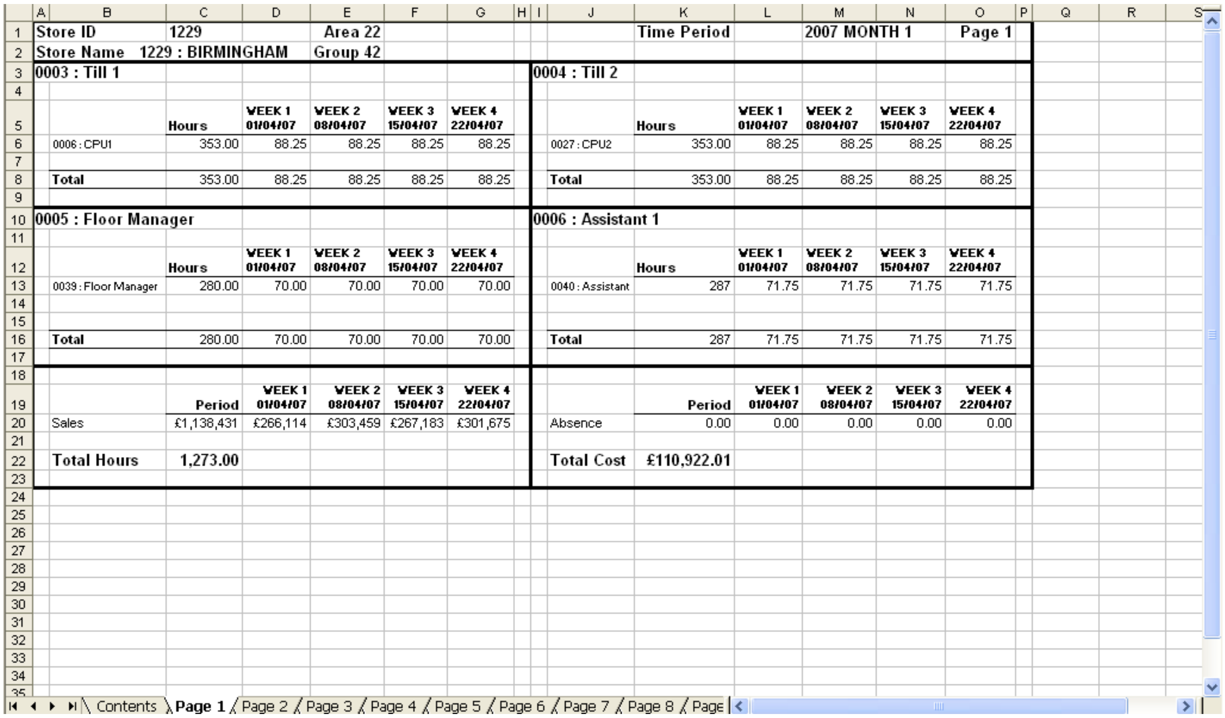
1. To view the report, go to the location where it was saved.
2. Double click file, for example, Report.xls.
3. The report will open in Microsoft Excel and will look similar to the screen below:



Level	Date Range	Page
1229 : BIRMINGHAM	2007 MONTH 1	1
1229 : BIRMINGHAM	2007 MONTH 2	2
1229 : BIRMINGHAM	2007 MONTH 3	3
1229 : BIRMINGHAM	2007 MONTH 4	4
1229 : BIRMINGHAM	2007 MONTH 5	5
1229 : BIRMINGHAM	2007 MONTH 6	6
1229 : BIRMINGHAM	2007 MONTH 7	7
1229 : BIRMINGHAM	2007 MONTH 8	8
1229 : BIRMINGHAM	2007 MONTH 9	9
1229 : BIRMINGHAM	2007 MONTH 10	10
1229 : BIRMINGHAM	2007 MONTH 11	11
1229 : BIRMINGHAM	2007 MONTH 12	12

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:



Store ID	1229		Area 22			Time Period		2007 MONTH 1		Page 1
Store Name	1229 : BIRMINGHAM		Group 42							

0003 : Till 1	Hours	WEEK 1 01/04/07	WEEK 2 08/04/07	WEEK 3 15/04/07	WEEK 4 22/04/07	0004 : Till 2	Hours	WEEK 1 01/04/07	WEEK 2 08/04/07	WEEK 3 15/04/07	WEEK 4 22/04/07
0006 : CPU1	353.00	88.25	88.25	88.25	88.25	0027 : CPU2	353.00	88.25	88.25	88.25	88.25
Total	353.00	88.25	88.25	88.25	88.25	Total	353.00	88.25	88.25	88.25	88.25

0005 : Floor Manager	Hours	WEEK 1 01/04/07	WEEK 2 08/04/07	WEEK 3 15/04/07	WEEK 4 22/04/07	0006 : Assistant 1	Hours	WEEK 1 01/04/07	WEEK 2 08/04/07	WEEK 3 15/04/07	WEEK 4 22/04/07
0039 : Floor Manager	280.00	70.00	70.00	70.00	70.00	0040 : Assistant	287	71.75	71.75	71.75	71.75
Total	280.00	70.00	70.00	70.00	70.00	Total	287	71.75	71.75	71.75	71.75

	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
Sales	£1,138,431	£266,114	£303,459	£267,183	£301,675	Absence	0.00	0.00	0.00	0.00	0.00
Total Hours	1,273.00					Total Cost	£110,922.01				

Contents / Page 1 / Page 2 / Page 3 / Page 4 / Page 5 / Page 6 / Page 7 / Page 8 / Page

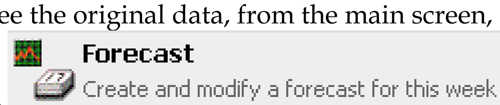
Report window

8. 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.

1. To see the original data, from the main screen, click 

and then 

.

Running the Report

1. To access the **Hours List Excel Report**, click 

menu and then the 

button.
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.

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.

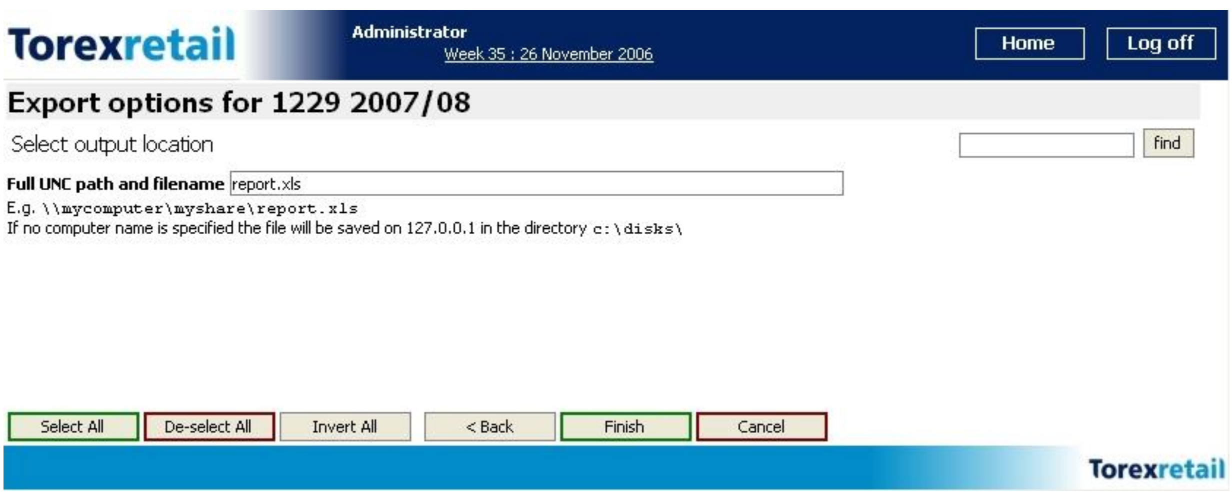
24. To tick all of the fields in the list, click **Select All**, at the bottom of the screen.

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

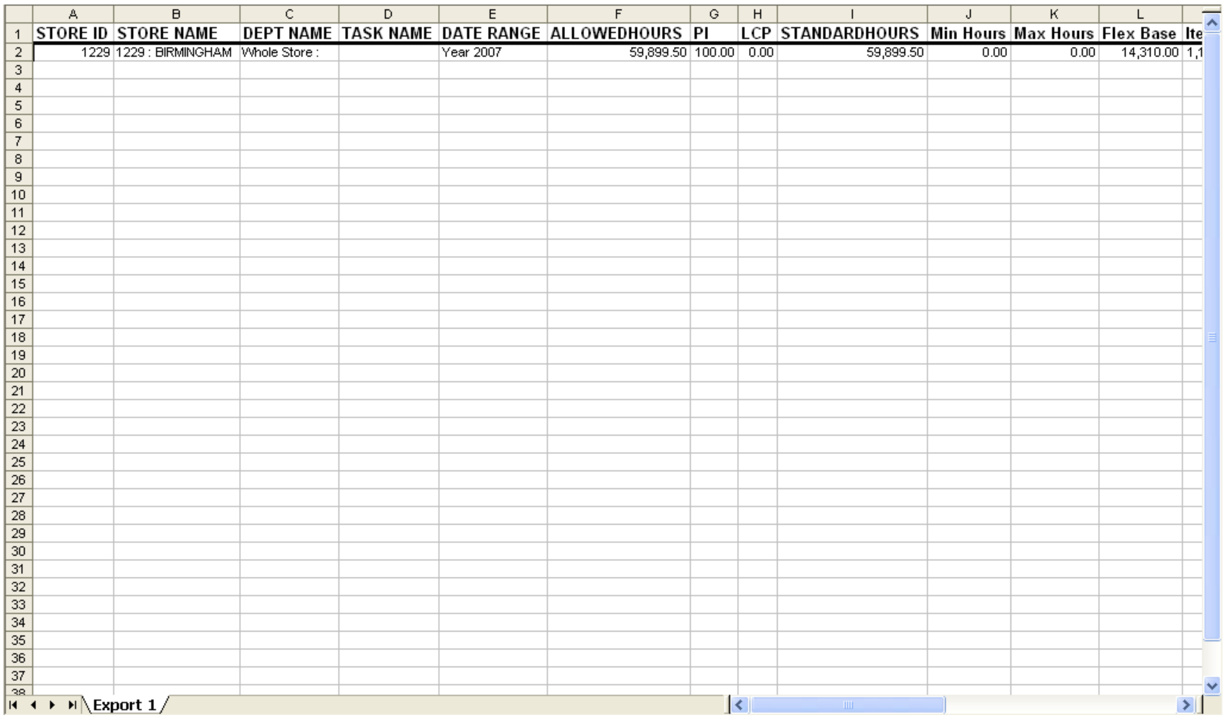
29. The filename **report.xls** will be set as the default name for this report. To change this, click into the field, delete the current name and type a new name.

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:



Viewing a Report window

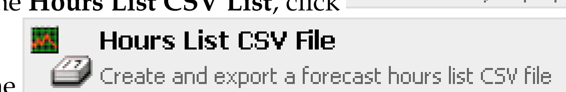
4. The relevant Store information is displayed first, with the Forecast data leading off to the right hand side of the screen.

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 

menu and then the 

.
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.

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.

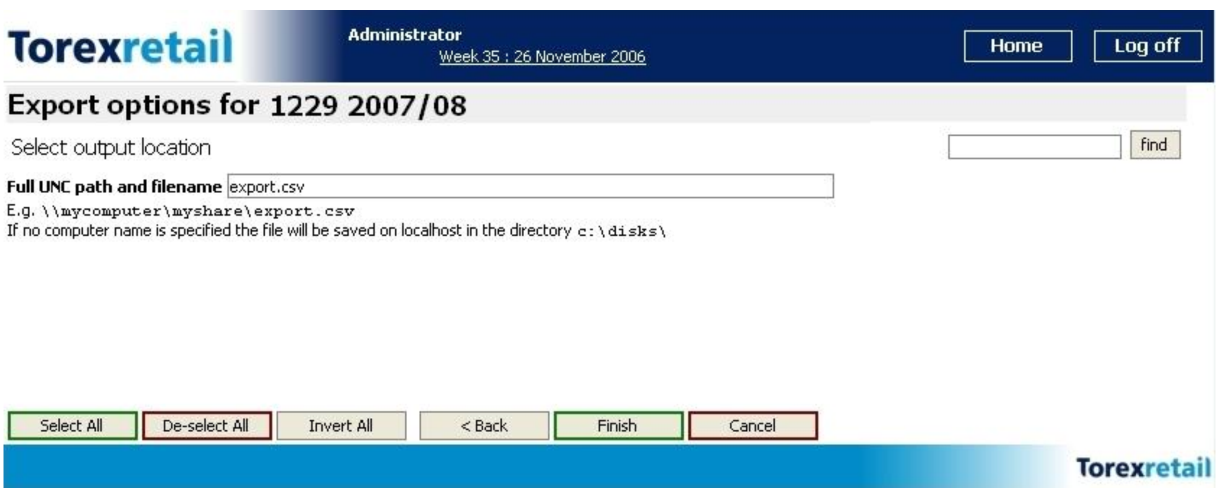
20. Clicking **Invert All** will tick any boxes which are unticked and untick any boxes which are ticked.

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 file for example, Where do you want it to be saved?



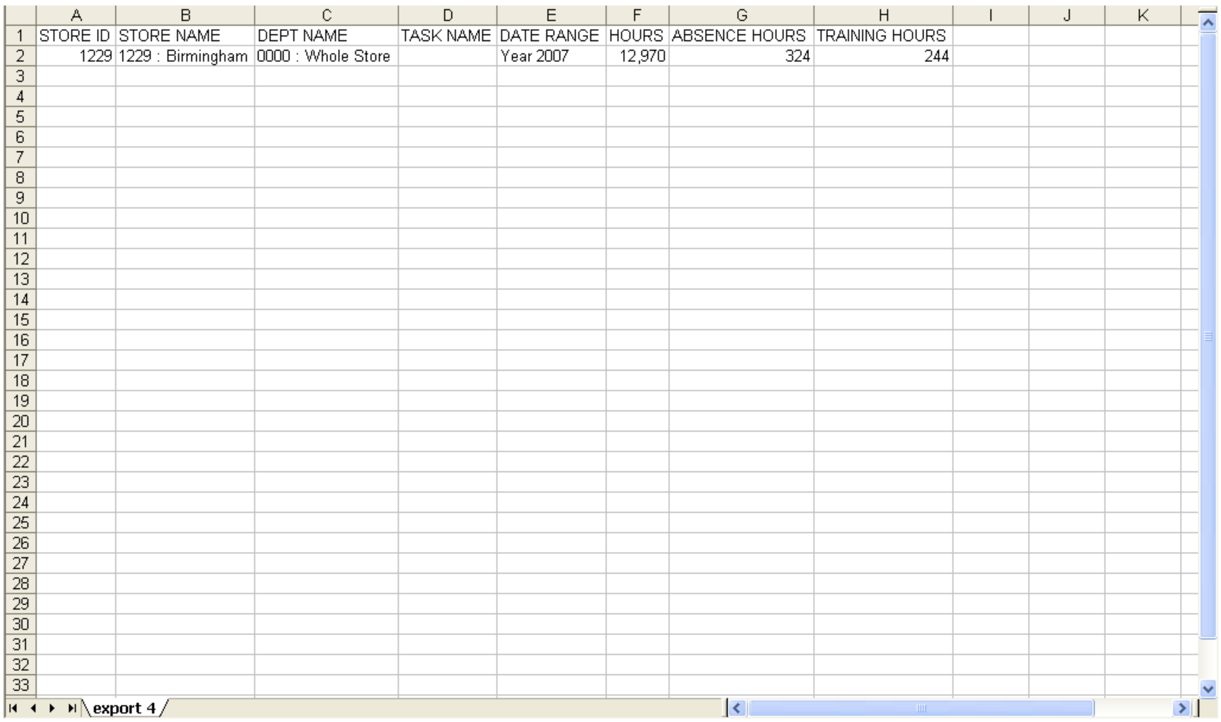
Export Options window

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:



STORE ID	STORE NAME	DEPT NAME	TASK NAME	DATE RANGE	HOURS	ABSENCE HOURS	TRAINING HOURS
1229	1229 : Birmingham	0000 : Whole Store		Year 2007	12,970	324	244

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 

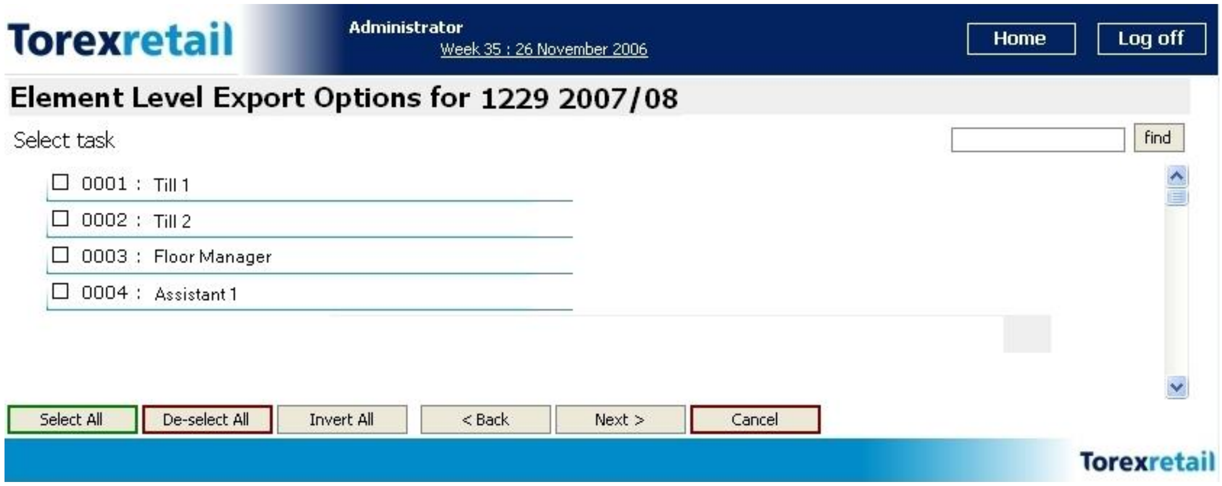
.
2. A screen, similar to that below, will be displayed:

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.

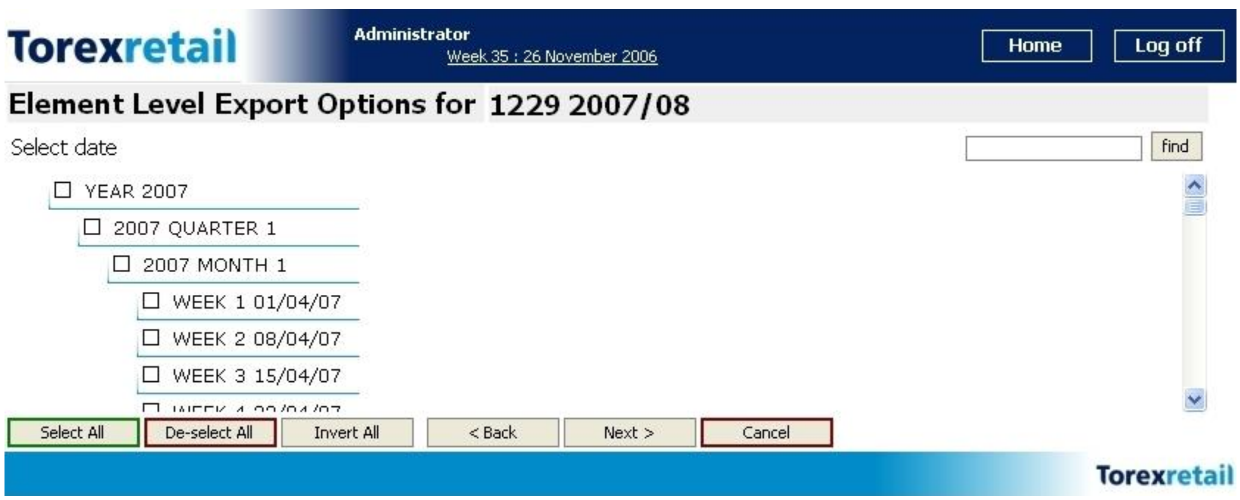
Export Options window

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.



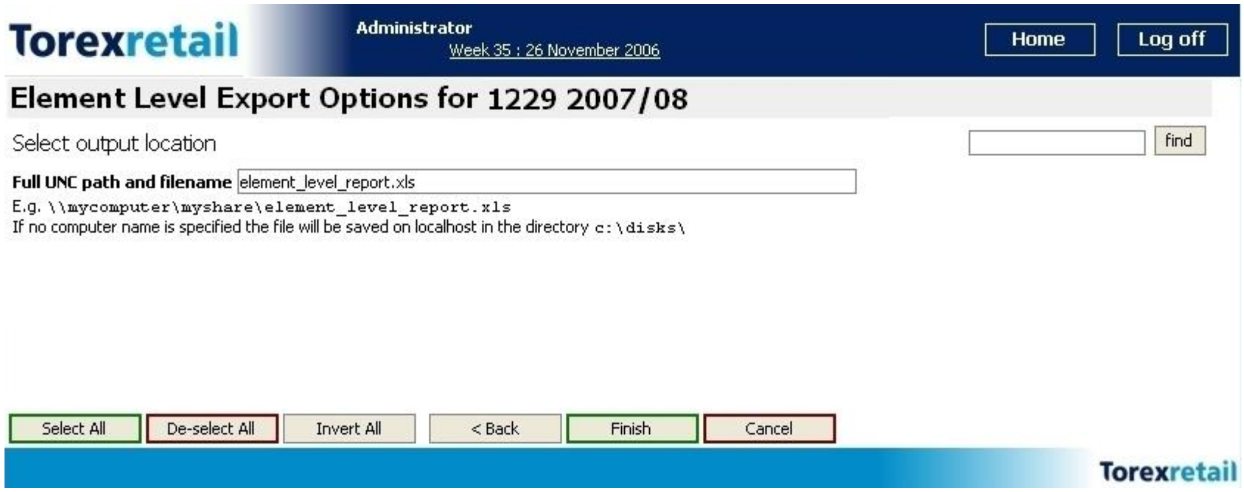
Export Options window

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.



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?



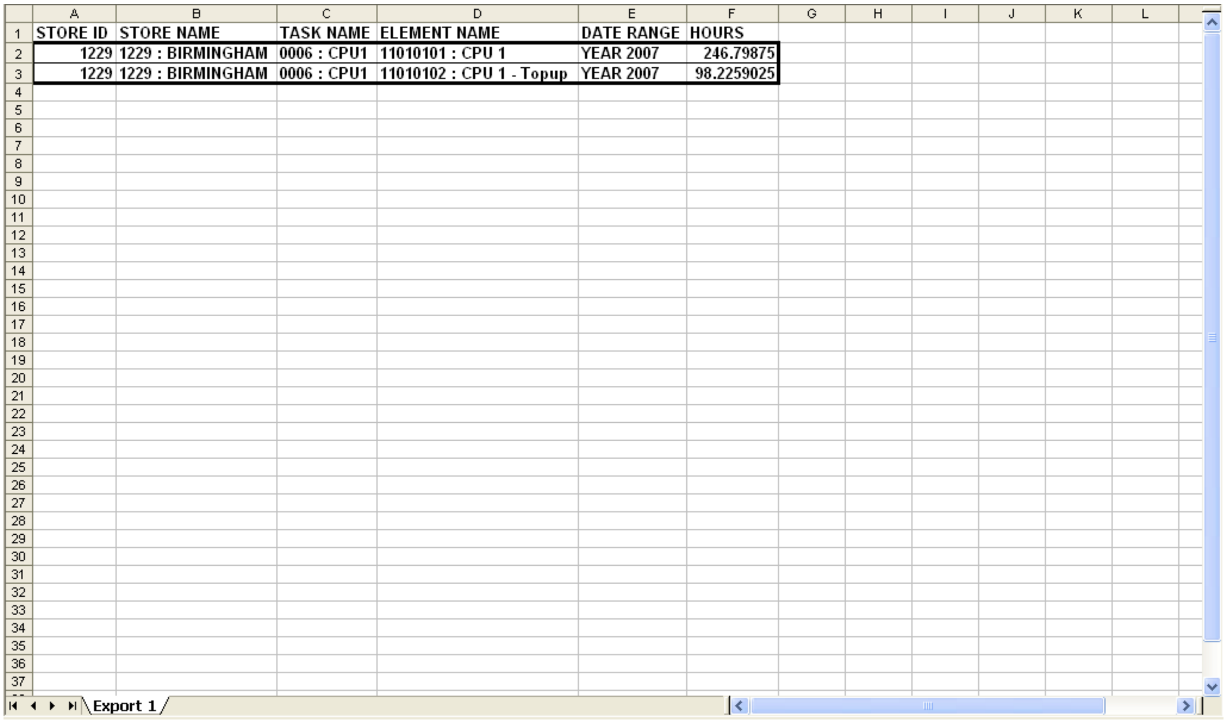
Export Options window

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:



STORE ID	STORE NAME	TASK NAME	ELEMENT NAME	DATE RANGE	HOURS
1229	1229 : BIRMINGHAM	0006 : CPU1	11010101 : CPU 1	YEAR 2007	246.79875
1229	1229 : BIRMINGHAM	0006 : CPU1	11010102 : CPU 1 - Topup	YEAR 2007	98.2259025

Viewing the Report window

4. 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

1. To access the **Element Level CSV File**, click 

menu and then the 

.

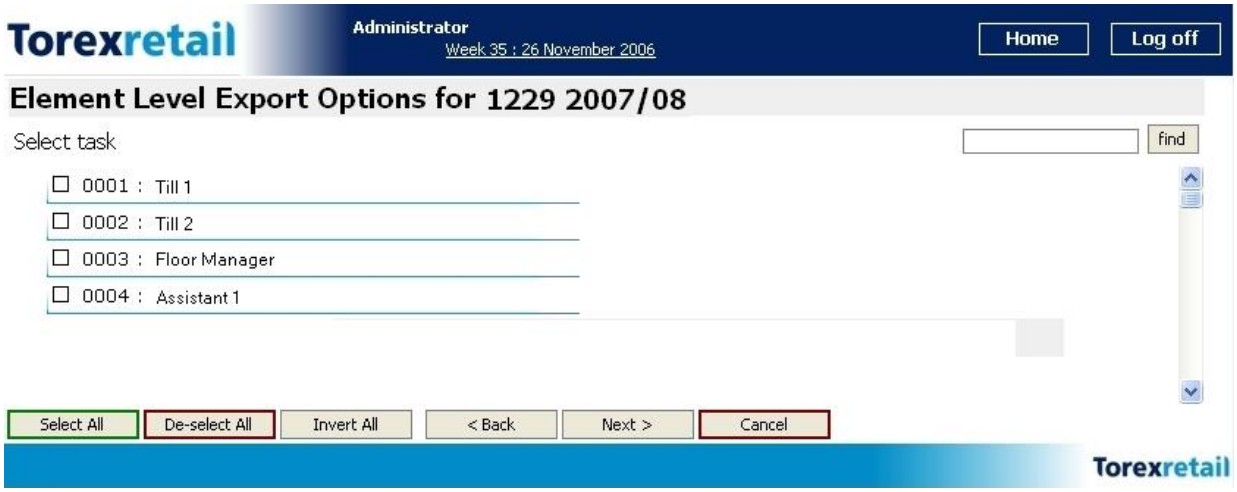
2. A screen, similar to that below, will be displayed:

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.

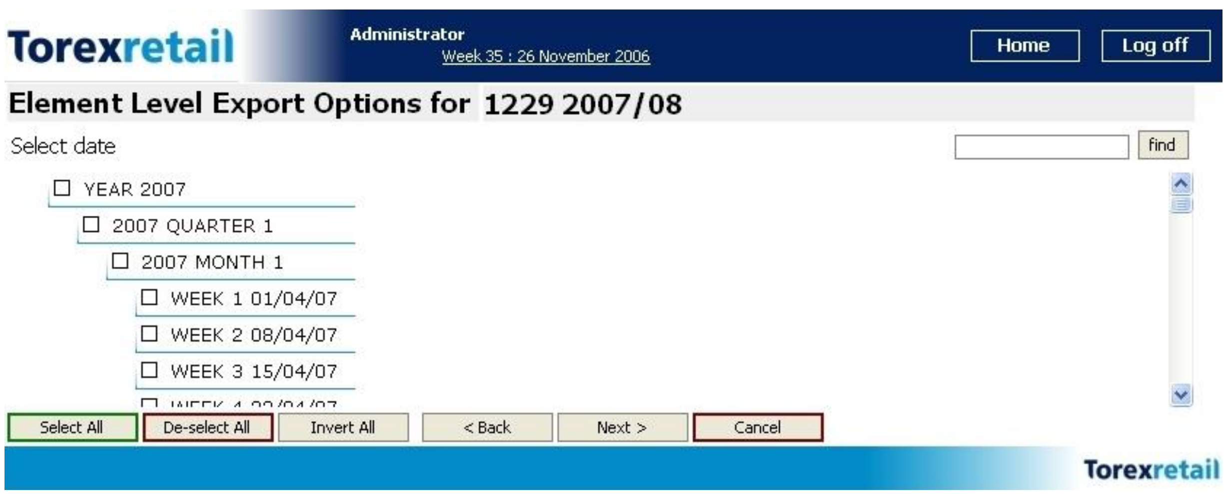
Export Options window

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.



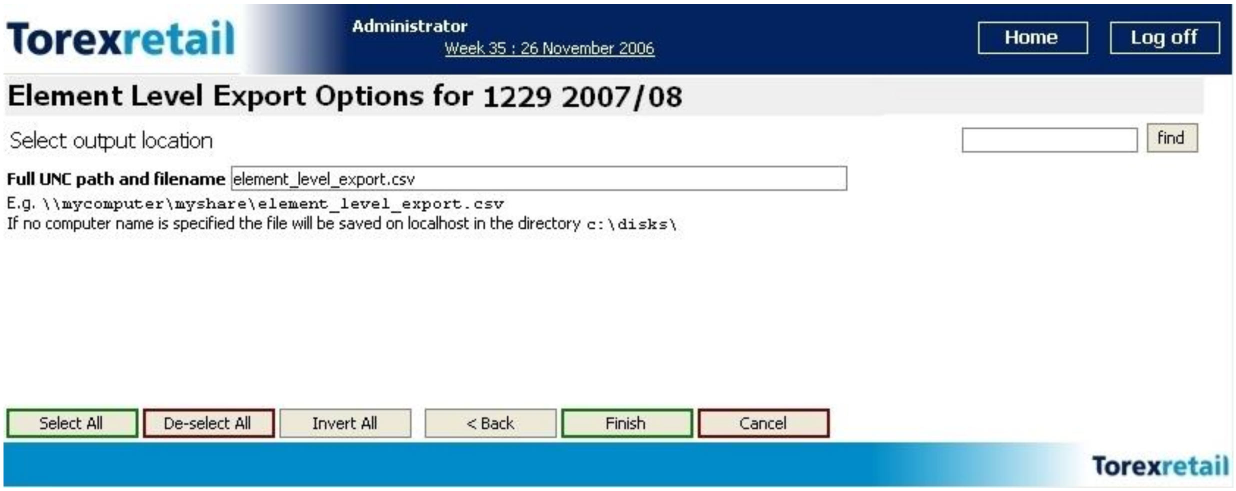
Export Options window

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. You are then required to enter the Output Location for the file for example, Where do you want it to be saved?



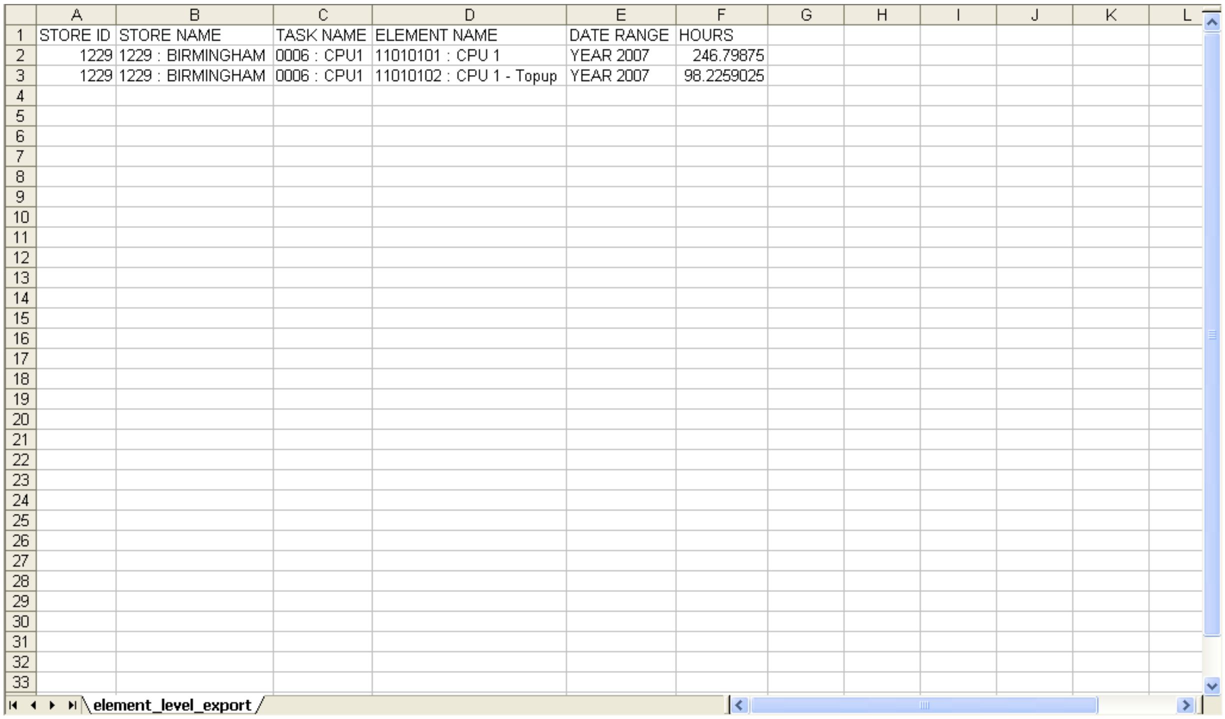
Export Options window

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
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

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

1. To access the **Breakdown**, click 

menu and then the 

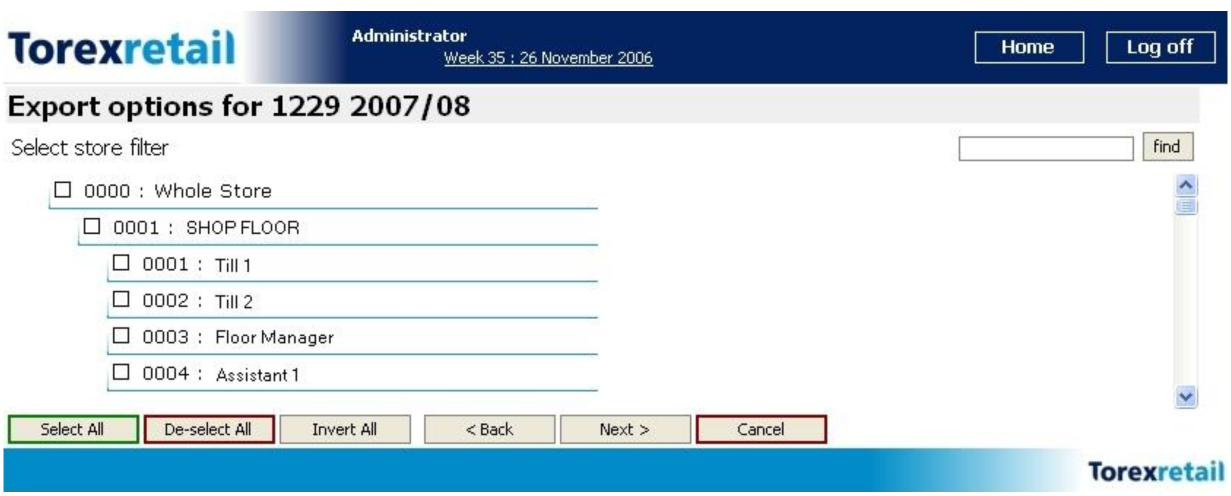
.
2. A screen, similar to that below, will be displayed:

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.



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.

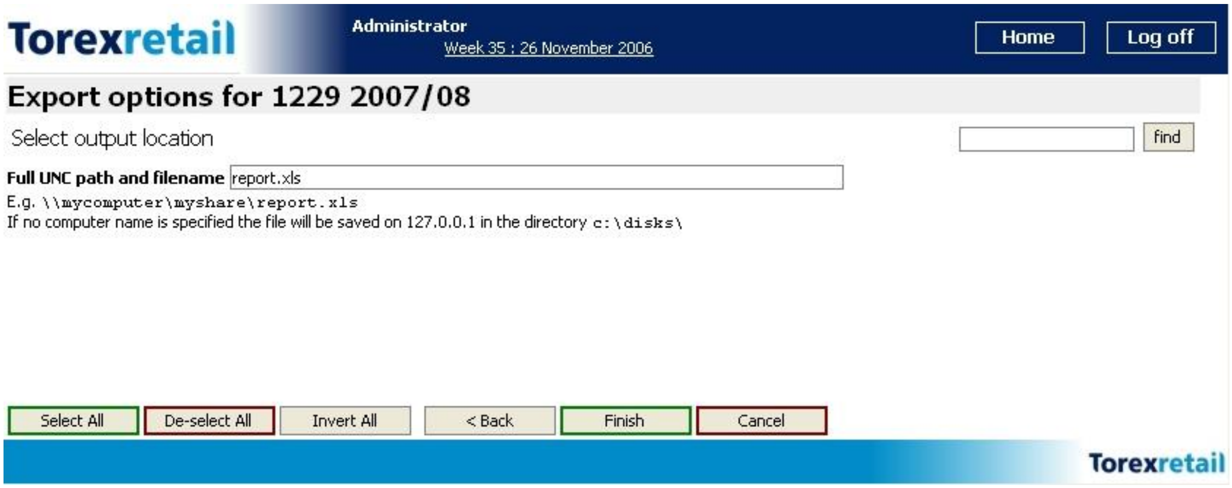
Export Options window

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?



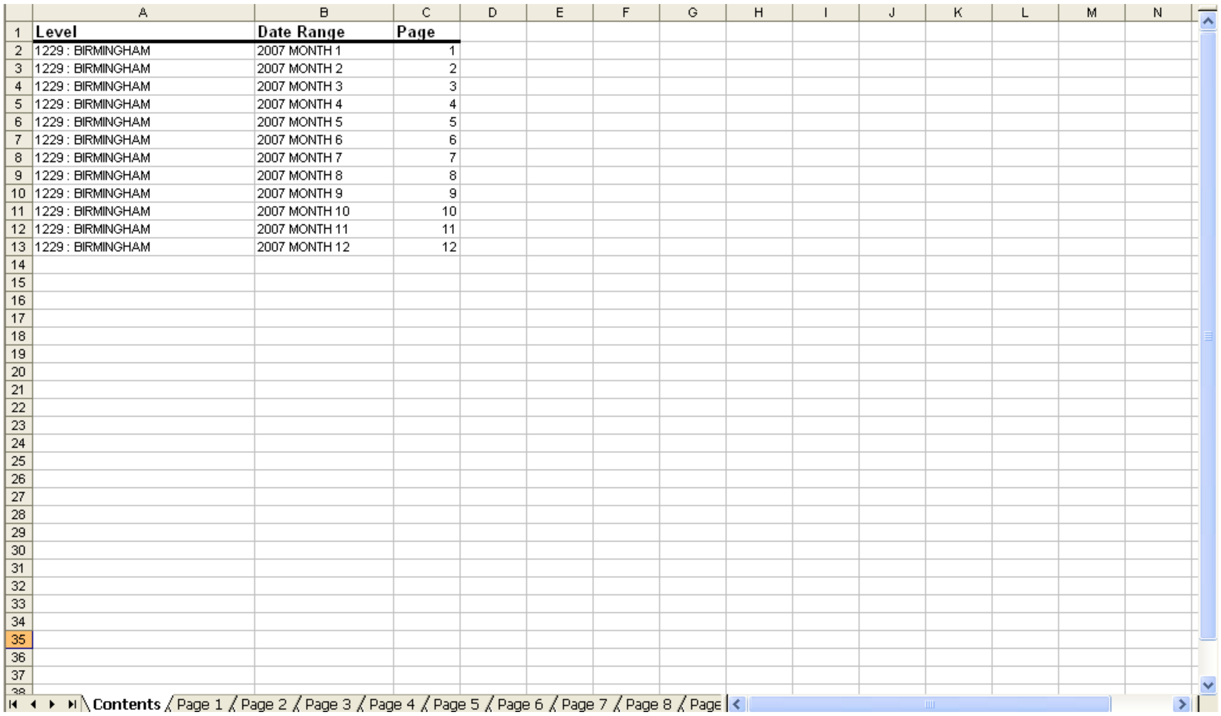
Export Options window

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:



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:

Store ID	1229	Area 22	Time Period	2007 MONTH 1
Store Name 1229 : BIRMINGHAM		Group 42		Page 1

0003 : TILL 1	Items	Hours	SubTotal	0004 : TILL 2	Items	Hours	SubTotal
0006 : CPU1			353.00	0027 : CPU2			353.00
Total			353.00	Total			353.00

0013 : FLOOR MANAGER	Items	Hours	SubTotal	0014 : ASSISTANT 1	Items	Hours	SubTotal
0039 : Floor Manager			280.00	0040 : Assistant			287.00
Total			280.00	Total			287.00

Total Hours	1,273.00

Report window

8. 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

1. To access the **New Summary**, click 

menu and then the 

.

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

Create and Export a Forecast Report

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.

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.

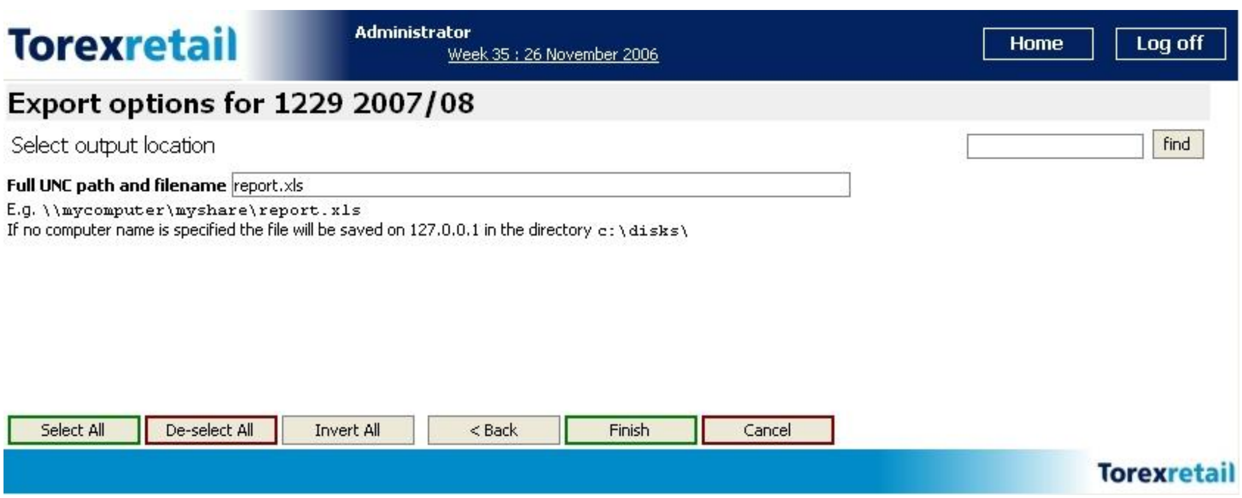
24. To tick all of the fields in the list, click **Select All**, at the bottom of the screen.

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

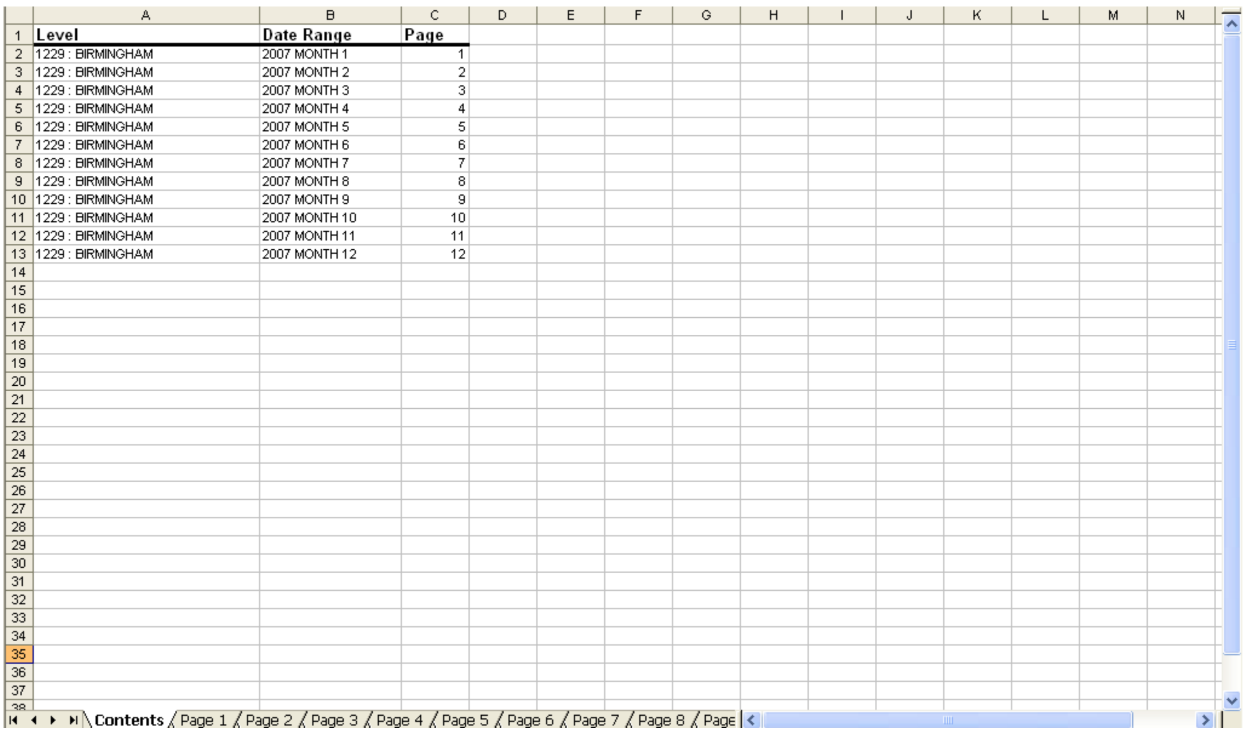
29. The filename **report.xls** will be set as the default name for this report. To change this, click into the field, delete the current name and type a new name.

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

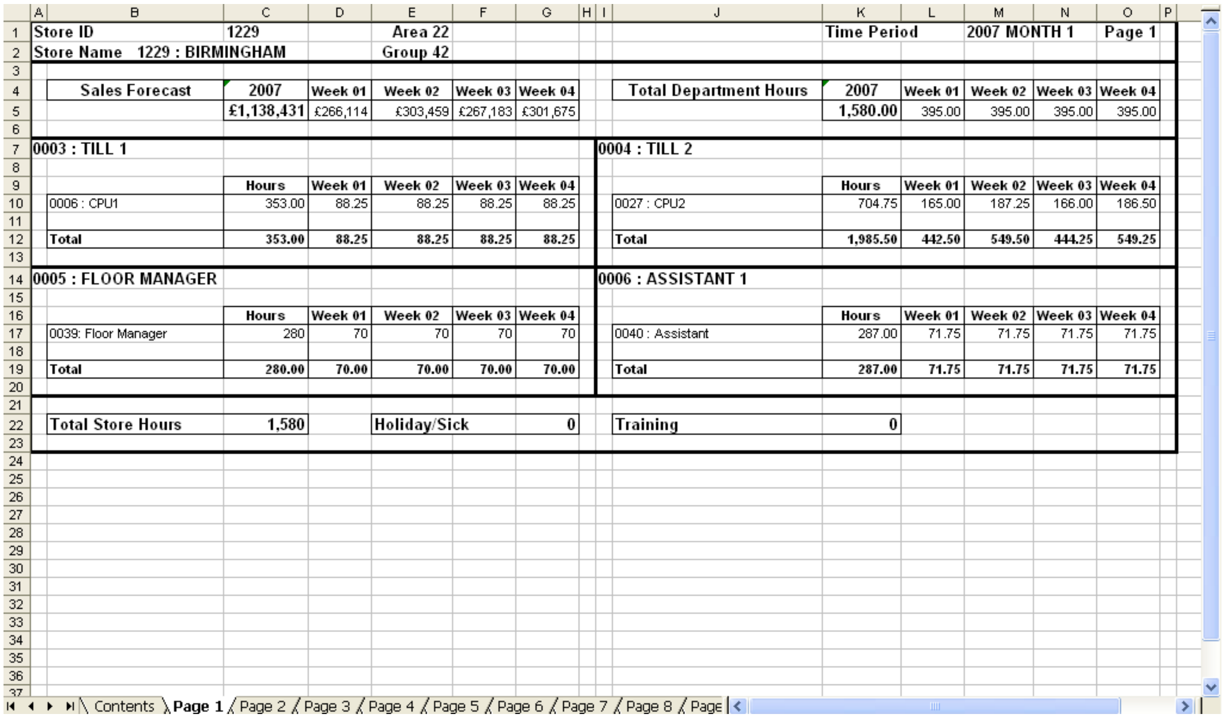
1. To view the report, go to the location where it was saved.
2. Double click file, for example, Report.xls.
3. The report will open in Microsoft Excel and will look similar to the screen below:



Level	Date Range	Page
1229 : BIRMINGHAM	2007 MONTH 1	1
1229 : BIRMINGHAM	2007 MONTH 2	2
1229 : BIRMINGHAM	2007 MONTH 3	3
1229 : BIRMINGHAM	2007 MONTH 4	4
1229 : BIRMINGHAM	2007 MONTH 5	5
1229 : BIRMINGHAM	2007 MONTH 6	6
1229 : BIRMINGHAM	2007 MONTH 7	7
1229 : BIRMINGHAM	2007 MONTH 8	8
1229 : BIRMINGHAM	2007 MONTH 9	9
1229 : BIRMINGHAM	2007 MONTH 10	10
1229 : BIRMINGHAM	2007 MONTH 11	11
1229 : BIRMINGHAM	2007 MONTH 12	12

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:



Report window

8. 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.

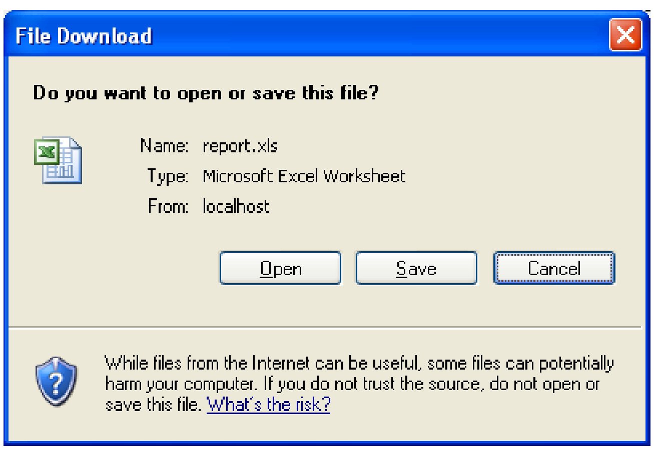
Running the Report

1. To access the **Elements**, click 

menu and then the 

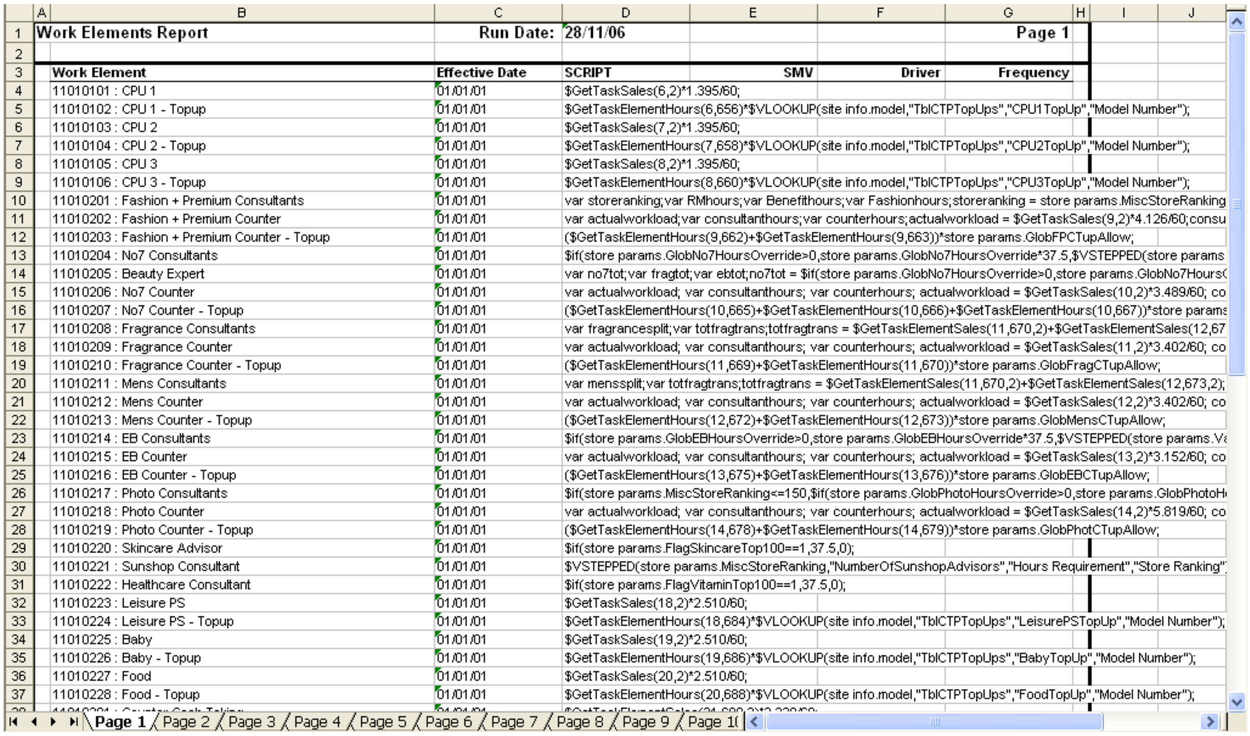
.

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.
6. If you chose to **Open** the file, or opened it at a later date, a screen, similar to that below, will be displayed:


Work Elements Report | Run Date: 28/11/06 | Page 1

Work Element	Effective Date	SCRIPT	SMV	Driver	Frequency
11010101 : CPU 1	01/01/01	$GetTaskSales(6,2)*1.395/60;			
11010102 : CPU 1 - Topup	01/01/01	$GetTaskElementHours(6,656)*$VLOOKUP(site info.model,"TblCTPTopUps","CPU1TopUp","Model Number");			
11010103 : CPU 2	01/01/01	$GetTaskSales(7,2)*1.395/60;			
11010104 : CPU 2 - Topup	01/01/01	$GetTaskElementHours(7,658)*$VLOOKUP(site info.model,"TblCTPTopUps","CPU2TopUp","Model Number");			
11010105 : CPU 3	01/01/01	$GetTaskSales(8,2)*1.395/60;			
11010106 : CPU 3 - Topup	01/01/01	$GetTaskElementHours(8,660)*$VLOOKUP(site info.model,"TblCTPTopUps","CPU3TopUp","Model Number");			
11010201 : Fashion + Premium Consultants	01/01/01	var storeranking;var RMhours;var Benefithours;var Fashionhours;storeranking = store params.MiscStoreRanking			
11010202 : Fashion + Premium Counter	01/01/01	var actualworkload;var consultanthours;var counterhours;actualworkload = $GetTaskSales(9,2)*4.126/60;consu			
11010203 : Fashion + Premium Counter - Topup	01/01/01	($GetTaskElementHours(9,662)+$GetTaskElementHours(9,663))*store params.GlobFPCTupAllow;			
11010204 : No7 Consultants	01/01/01	$if(store params.GlobNo7HoursOverride>0,store params.GlobNo7HoursOverride*37.5,$VSTEPPED(store params			
11010205 : Beauty Expert	01/01/01	var no7tot;var fragtot;var ebtot;no7tot = $if(store params.GlobNo7HoursOverride>0,store params.GlobNo7Hours(			
11010206 : No7 Counter	01/01/01	var actualworkload; var consultanthours; var counterhours; actualworkload = $GetTaskSales(10,2)*3.489/60; co			
11010207 : No7 Counter - Topup	01/01/01	($GetTaskElementHours(10,665)+$GetTaskElementHours(10,666)+$GetTaskElementHours(10,667))*store params			
11010208 : Fragrance Consultants	01/01/01	var fragrancesplit;var totfragtrans;totfragtrans = $GetTaskElementSales(11,670,2)+$GetTaskElementSales(12,67			
11010209 : Fragrance Counter	01/01/01	var actualworkload; var consultanthours; var counterhours; actualworkload = $GetTaskSales(11,2)*3.402/60; co			
11010210 : Fragrance Counter - Topup	01/01/01	($GetTaskElementHours(11,669)+$GetTaskElementHours(11,670))*store params.GlobFragCTupAllow;			
11010211 : Mens Consultants	01/01/01	var menssplit;var totfragtrans;totfragtrans = $GetTaskElementSales(11,670,2)+$GetTaskElementSales(12,673,2);			
11010212 : Mens Counter	01/01/01	var actualworkload; var consultanthours; var counterhours; actualworkload = $GetTaskSales(12,2)*3.402/60; co			
11010213 : Mens Counter - Topup	01/01/01	($GetTaskElementHours(12,672)+$GetTaskElementHours(12,673))*store params.GlobMensCTupAllow;			
11010214 : EB Consultants	01/01/01	$if(store params.GlobEBHoursOverride>0,store params.GlobEBHoursOverride*37.5,$VSTEPPED(store params.Va			
11010215 : EB Counter	01/01/01	var actualworkload; var consultanthours; var counterhours; actualworkload = $GetTaskSales(13,2)*3.152/60; co			
11010216 : EB Counter - Topup	01/01/01	($GetTaskElementHours(13,675)+$GetTaskElementHours(13,676))*store params.GlobEBCTupAllow;			
11010217 : Photo Consultants	01/01/01	$if(store params.MiscStoreRanking<=150,$if(store params.GlobPhotoHoursOverride>0,store params.GlobPhotoH			
11010218 : Photo Counter	01/01/01	var actualworkload; var consultanthours; var counterhours; actualworkload = $GetTaskSales(14,2)*5.819/60; co			
11010219 : Photo Counter - Topup	01/01/01	($GetTaskElementHours(14,678)+$GetTaskElementHours(14,679))*store params.GlobPhotCTupAllow;			
11010220 : Skincare Advisor	01/01/01	$if(store params.FlagSkincareTop100==1,37.5,0);			
11010221 : Sunshop Consultant	01/01/01	$VSTEPPED(store params.MiscStoreRanking,"NumberOfSunshopAdvisors","Hours Requirement","Store Ranking"			
11010222 : Healthcare Consultant	01/01/01	$if(store params.FlagVitaminTop100==1,37.5,0);			
11010223 : Leisure PS	01/01/01	$GetTaskSales(18,2)*2.510/60;			
11010224 : Leisure PS - Topup	01/01/01	$GetTaskElementHours(18,684)*$VLOOKUP(site info.model,"TblCTPTopUps","LeisurePSTopUp","Model Number");			
11010225 : Baby	01/01/01	$GetTaskSales(19,2)*2.510/60;			
11010226 : Baby - Topup	01/01/01	$GetTaskElementHours(19,686)*$VLOOKUP(site info.model,"TblCTPTopUps","BabyTopUp","Model Number");			
11010227 : Food	01/01/01	$GetTaskSales(20,2)*2.510/60;			
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

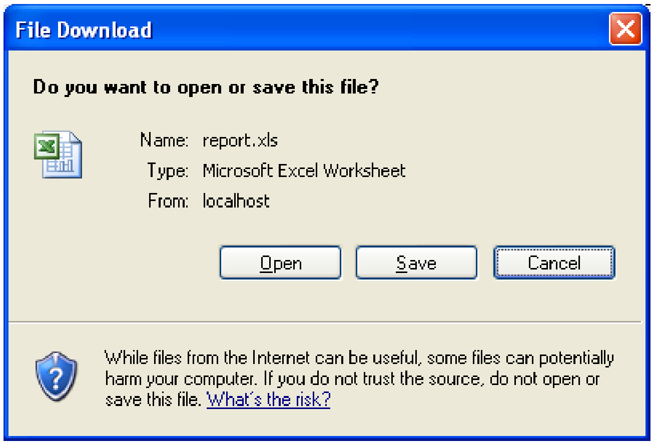
Running the Report

1. To access the **Export**, click 

and then the 

.

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

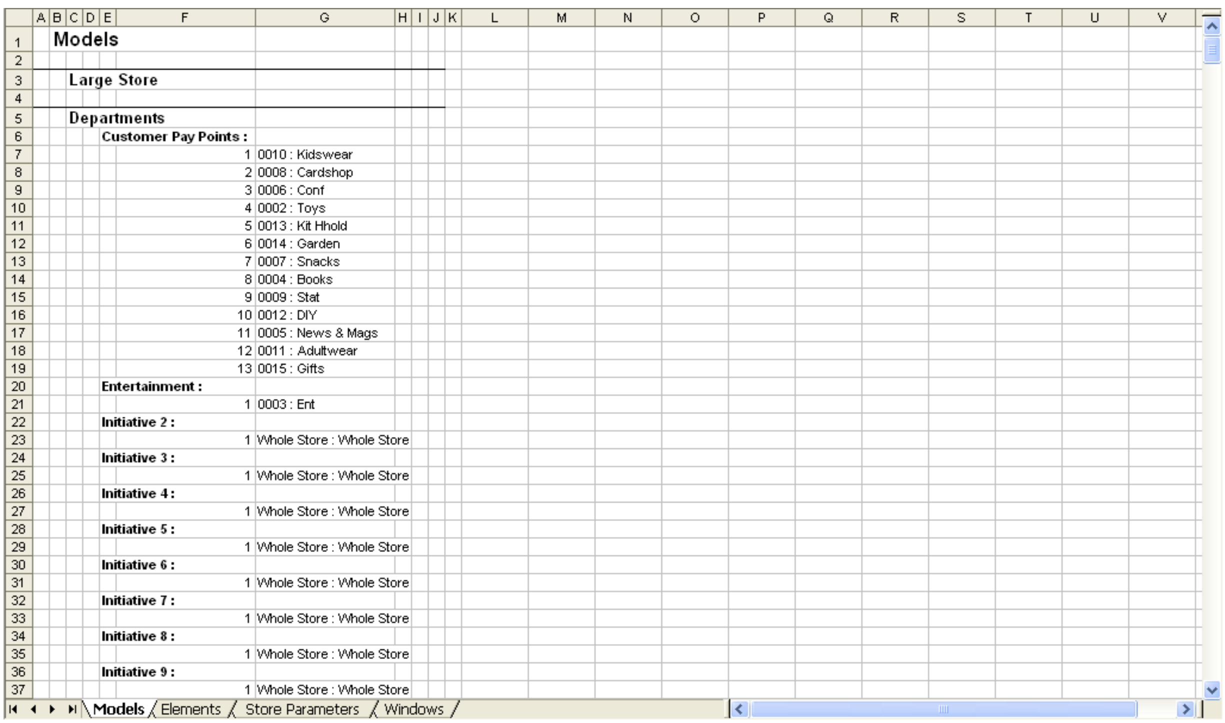


File Download window

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:



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.

Element	Date	Fixed?	Freeform	Script	Driver	SMV	Frequency
001 : Sales Floor Cust	01/01/2000	variable	yes	((0.001786/store params.Peak Week Perc)*store params.Cust Serv Ramp)*($GetTaskSales(5,1)+$GetT			
002 : In Trade Fill	01/01/2000	variable	yes	($GetTaskSales(5,1)*(1-store params.OOH Fill Percent))*(0.0083835/store params.Peak Week Perc);			
003 : Extra Fill (Fri. Sat	01/01/2000	variable	yes	(0.0012205/store params.Peak Week Perc)*$GetTaskSales(5,1);			
004 : Extra Fill (High Pr	01/01/2000	fixed	no		No Driver	0	015 : Once Per Week
005 : Additional Sales	01/01/2000	variable	yes	$if(store params.Number of Salesfloors>2,Windows.Store Trading Hours.Hours*2,$if(store params.Num			
006 : Clothing Band H	01/01/2000	variable	yes	store params.Clothing Band Hours;			
007 : Clean and Count	01/01/2000	fixed	no		No Driver	606	015 : Once Per Week
008 : OOH Fill	01/01/2000	variable	yes	($GetTaskSales(6,1)*0.75)*(0.0041918/store params.Peak Week Perc);			
009 : OOH Manageme	01/01/2000	fixed	yes	0.5*((($GetTaskSales(6,1)*0.75)*(0.0041918/store params.Peak Week Perc))/store params.Peak Week			
010 : Stock Managem	01/01/2000	fixed	no		No Driver	70.8	015 : Once Per Week
013 : Lottery Element	01/01/2000	variable	no		Items	0.1488	015 : Once Per Week
014 : Ent In Trade Fill	01/01/2000	variable	yes	$GetTaskSales(3,1)*(0.25)*0.0088;			
015 : Ent OOH Fill	01/01/2000	variable	yes	$GetTaskSales(3,1)*(0.75)*0.0088;			
016 : Ent. Cash Desk 1	01/01/2000	fixed	no		No Driver	1117.8	015 : Once Per Week
017 : Checkouts	01/01/2000	variable	yes	(0.0021070*(store params.Cust Paypoint Ramp))*$GetTaskSales(1,1);			
018 : Minimum Manni	01/01/2000	fixed	no		No Driver	3432	015 : Once Per Week
020 : King Store Savin	01/01/2000	fixed	no		Sales	394.8	016 : Cluster
021 : SM, Ams Elemen	01/01/2000	fixed	no		No Driver	8100	015 : Once Per Week
022 : All Office Work 1	01/01/2000	fixed	no		No Driver	234	015 : Once Per Week
023 : Stock Managem	01/01/2000	variable	yes	var calc;calc=0.0022311*$GetTaskSales(7,1);this=$if(calc>140,140,calc);			
024 : Entertainment C	01/01/2000	variable	yes	(0.0364394*store params.Cust Serv Ramp)*$GetTaskSales(3,1)			
025 : Ent. Cash Desk 2	01/01/2000	variable	no		Items	0.744	015 : Once Per Week
026 : Minimum Manni	01/01/2000	variable	yes	(65*4)-($GetTaskSales(1,1))*0.0023;			
027 : All Office Work 2	01/01/2000	variable	yes	$GetTaskSales(8,1)*(0.001128/store params.Peak Week Perc);			
028 : Sales Floor Targ	01/01/2000	variable	yes	store params.Target Adjustment;			
029 : Sales Floor Top	01/01/2000	variable	yes	((((store params.Sales Floor-store params.Sales Floor Cover)*0.99)-42)/store params.Peak Week Perc)			
030 : Permanent Diffi	01/01/2000	variable	yes	store params.Difficulty Factor;			
031 : Shop Floor Top	01/01/2000	fixed	no		No Driver	300	015 : Once Per Week
032 : Minimum POS/S	01/01/2000	variable	yes	(store params.Contracted Hours-store params.Base Hours)*$if(store params.Cluster>8,0.8,$if(store pa			
033 : Ent Runners	15/10/2000	variable	yes	store params.Entertainment Runners;			
034 : Botany Bay	15/10/2000	variable	yes	store params.Botany Bay;			
035 : Electric Shop	15/10/2000	variable	yes	store params.Electric Shop			
036 : Top 200 xmas Se	15/10/2000	variable	yes	store params.Top 200 xmas Service;			
037 : Ent Extended	15/10/2000	variable	yes	store params.Ent Extended			
038 : Swap Element	01/01/2000	variable	yes	store params.Swap Hours			

Models | Elements | Store Parameters | Windows

Elements Tab window

4. Selecting the **Store Parameters** tab, displays all of the **Store Parameters** for each store.

Store Parameters

Name	Site	Effective date	Value
001 : Number of Cash Desks	0229 : Birmingham	30/07/2006	2
001 : Number of Cash Desks	0229 : Birmingham	06/08/2006	2
001 : Number of Cash Desks	0229 : Birmingham	13/08/2006	2
001 : Number of Cash Desks	0229 : Birmingham	20/08/2006	2
001 : Number of Cash Desks	0229 : Birmingham	27/08/2006	2
001 : Number of Cash Desks	0229 : Birmingham	03/09/2006	2
001 : Number of Cash Desks	0229 : Birmingham	10/09/2006	2
001 : Number of Cash Desks	0229 : Birmingham	17/09/2006	2
001 : Number of Cash Desks	0229 : Birmingham	24/09/2006	2
001 : Number of Cash Desks	0229 : Birmingham	01/10/2006	2
001 : Number of Cash Desks	0229 : Birmingham	08/10/2006	2
001 : Number of Cash Desks	0229 : Birmingham	15/10/2006	2
001 : Number of Cash Desks	0229 : Birmingham	22/10/2006	2
001 : Number of Cash Desks	0229 : Birmingham	29/10/2006	2
001 : Number of Cash Desks	0229 : Birmingham	05/11/2006	2
001 : Number of Cash Desks	0229 : Birmingham	12/11/2006	2
001 : Number of Cash Desks	0229 : Birmingham	19/11/2006	2
001 : Number of Cash Desks	0229 : Birmingham	26/11/2006	2
001 : Number of Cash Desks	0229 : Birmingham	03/12/2006	2
001 : Number of Cash Desks	0229 : Birmingham	10/12/2006	2
001 : Number of Cash Desks	0229 : Birmingham	17/12/2006	2
001 : Number of Cash Desks	0229 : Birmingham	24/12/2006	2
001 : Number of Cash Desks	0229 : Birmingham	31/12/2006	2
001 : Number of Cash Desks	0229 : Birmingham	07/01/2007	2
001 : Number of Cash Desks	0229 : Birmingham	14/01/2007	2
001 : Number of Cash Desks	0229 : Birmingham	21/01/2007	2
001 : Number of Cash Desks	0229 : Birmingham	28/01/2007	2
001 : Number of Cash Desks	0314 : Witney	30/07/2006	1
001 : Number of Cash Desks	0314 : Witney	06/08/2006	1
001 : Number of Cash Desks	0314 : Witney	13/08/2006	1
001 : Number of Cash Desks	0314 : Witney	20/08/2006	1
001 : Number of Cash Desks	0314 : Witney	27/08/2006	1
001 : Number of Cash Desks	0314 : Witney	03/09/2006	1
001 : Number of Cash Desks	0314 : Witney	10/09/2006	1

Models | Elements | Store Parameters | Windows

Store Parameters window

5. Selecting the **Windows** tab, displays the **Operating Windows** for each store.

Operating Windows

Store Trading Hours

0229 : Birmingham	Default	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	Start	11:00	08:30	08:30	08:30	08:30	08:30	08:30
	Stop	17:00	18:00	18:00	18:00	20:00	18:00	18:00
0229 : Birmingham	12/11/2006	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	Start	11:00	08:30	08:30	08:30	08:30	08:30	08:30
	Stop	17:00	18:00	18:00	18:00	20:00	19:00	19:00
0229 : Birmingham	19/11/2006	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	Start	11:00	08:30	08:30	08:30	08:30	08:30	08:30
	Stop	17:00	18:00	18:00	18:00	20:00	19:00	19:00
0229 : Birmingham	26/11/2006	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	Start	11:00	08:30	08:30	08:30	08:30	08:30	08:30
	Stop	17:00	18:00	18:00	18:00	21:00	19:00	19:00
0229 : Birmingham	03/12/2006	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	Start	11:00	08:30	08:30	08:30	08:30	08:30	08:30
	Stop	17:00	18:00	18:00	18:00	21:00	19:00	19:00
0229 : Birmingham	10/12/2006	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	Start	11:00	08:30	08:30	08:30	08:30	08:30	08:30
	Stop	17:00	19:00	19:00	19:00	21:00	20:00	20:00
0229 : Birmingham	17/12/2006	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	Start	11:00	08:30	08:30	08:30	08:30	08:30	08:30
	Stop	17:00	20:00	20:00	20:00	21:00	21:00	21:00
0229 : Birmingham	24/12/2006	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	Start	11:00	00:00	09:00	08:30	08:30	08:30	08:30
	Stop	17:00	00:00	17:30	18:00	18:00	18:00	18:00
0229 : Birmingham	31/12/2006	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	Start	11:00	08:30	08:30	08:30	08:30	08:30	08:30
	Stop	17:00	18:00	18:00	18:00	18:00	18:00	18:00
0314 : Witney	Default	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	Start	10:30	09:00	09:00	09:00	09:00	09:00	09:00
	Stop	16:30	17:30	17:30	17:30	17:30	17:30	17:30
0314 : Witney	10/12/2006	Sun	Mon	Tue	Wed	Thu	Fri	Sat
	Start	10:30	09:00	09:00	09:00	09:00	09:00	09:00
	Stop	16:30	17:30	17:30	17:30	17:30	20:00	18:00

Models / Elements / Store Parameters / Windows

Operating Windows window

Workload

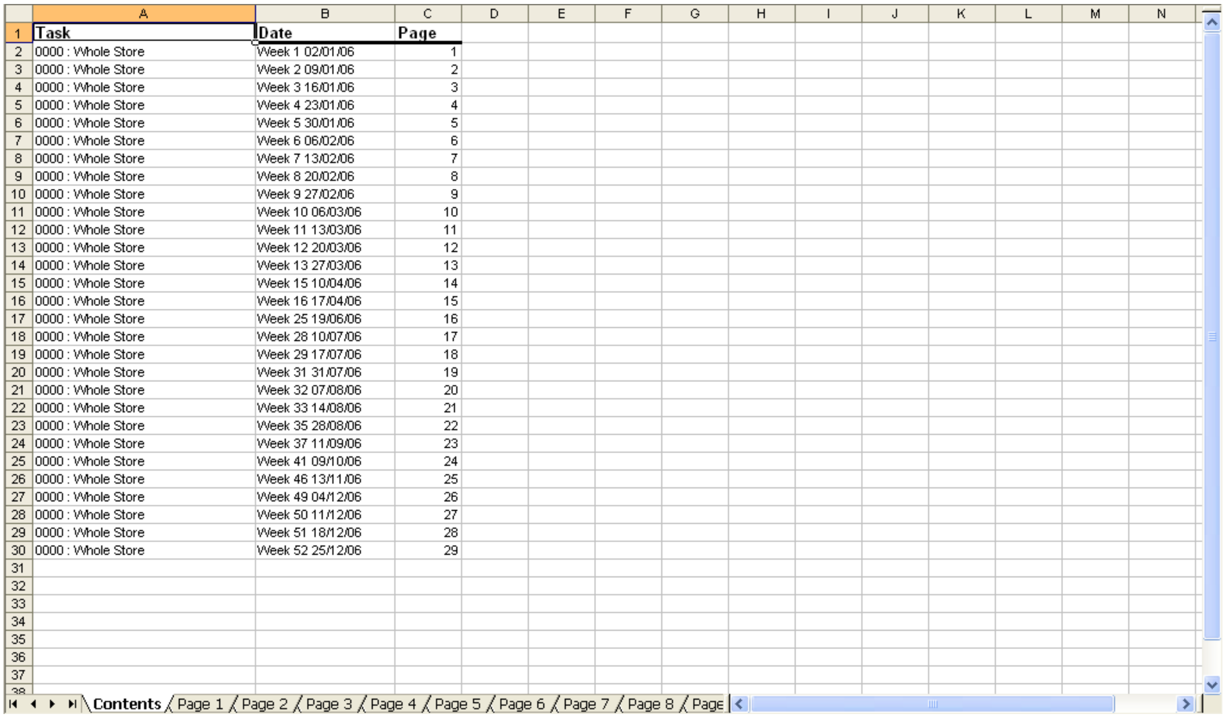
This report displays the number of staff required on a daily basis.

Running the Report

1. To access the **Workload**, click 

and then the 

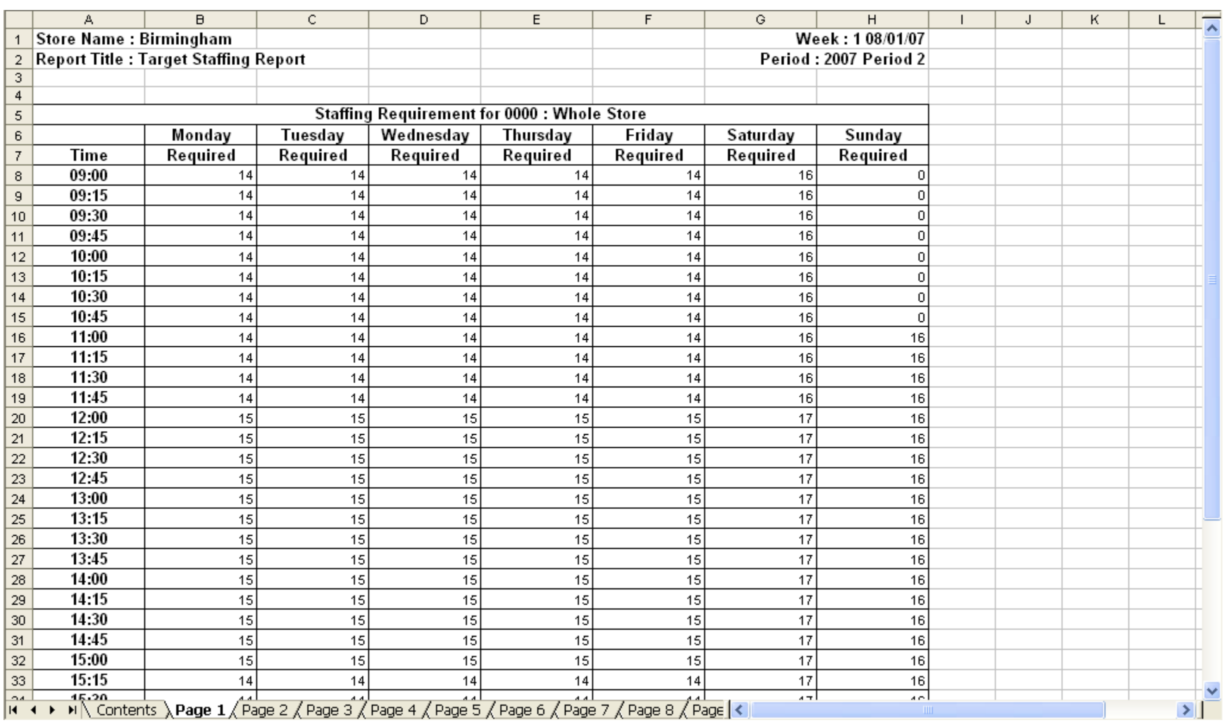
.
2. A screen, similar to that below, will be displayed:



Task	Date	Page
0000 : Whole Store	Week 1 02/01/06	1
0000 : Whole Store	Week 2 09/01/06	2
0000 : Whole Store	Week 3 16/01/06	3
0000 : Whole Store	Week 4 23/01/06	4
0000 : Whole Store	Week 5 30/01/06	5
0000 : Whole Store	Week 6 06/02/06	6
0000 : Whole Store	Week 7 13/02/06	7
0000 : Whole Store	Week 8 20/02/06	8
0000 : Whole Store	Week 9 27/02/06	9
0000 : Whole Store	Week 10 06/03/06	10
0000 : Whole Store	Week 11 13/03/06	11
0000 : Whole Store	Week 12 20/03/06	12
0000 : Whole Store	Week 13 27/03/06	13
0000 : Whole Store	Week 15 10/04/06	14
0000 : Whole Store	Week 16 17/04/06	15
0000 : Whole Store	Week 25 19/06/06	16
0000 : Whole Store	Week 28 10/07/06	17
0000 : Whole Store	Week 29 17/07/06	18
0000 : Whole Store	Week 31 31/07/06	19
0000 : Whole Store	Week 32 07/08/06	20
0000 : Whole Store	Week 33 14/08/06	21
0000 : Whole Store	Week 35 28/08/06	22
0000 : Whole Store	Week 37 11/09/06	23
0000 : Whole Store	Week 41 09/10/06	24
0000 : Whole Store	Week 46 13/11/06	25
0000 : Whole Store	Week 49 04/12/06	26
0000 : Whole Store	Week 50 11/12/06	27
0000 : Whole Store	Week 51 18/12/06	28
0000 : Whole Store	Week 52 25/12/06	29

Running the Report window

3. 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.
4. Selecting one of the Page tabs at the bottom of the screen, will display a page similar to that below:



Store Name : Birmingham — Week : 1 08/01/07
Report Title : Target Staffing Report — Period : 2007 Period 2

Staffing Requirement for 0000 : Whole Store							
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Time	Required	Required	Required	Required	Required	Required	Required
09:00	14	14	14	14	14	16	0
09:15	14	14	14	14	14	16	0
09:30	14	14	14	14	14	16	0
09:45	14	14	14	14	14	16	0
10:00	14	14	14	14	14	16	0
10:15	14	14	14	14	14	16	0
10:30	14	14	14	14	14	16	0
10:45	14	14	14	14	14	16	0
11:00	14	14	14	14	14	16	16
11:15	14	14	14	14	14	16	16
11:30	14	14	14	14	14	16	16
11:45	14	14	14	14	14	16	16
12:00	15	15	15	15	15	17	16
12:15	15	15	15	15	15	17	16
12:30	15	15	15	15	15	17	16
12:45	15	15	15	15	15	17	16
13:00	15	15	15	15	15	17	16
13:15	15	15	15	15	15	17	16
13:30	15	15	15	15	15	17	16
13:45	15	15	15	15	15	17	16
14:00	15	15	15	15	15	17	16
14:15	15	15	15	15	15	17	16
14:30	15	15	15	15	15	17	16
14:45	15	15	15	15	15	17	16
15:00	15	15	15	15	15	17	16
15:15	14	14	14	14	14	17	16

Report window

5. Clicking on other Page tabs, at the bottom of the screen, will display information for other dates.

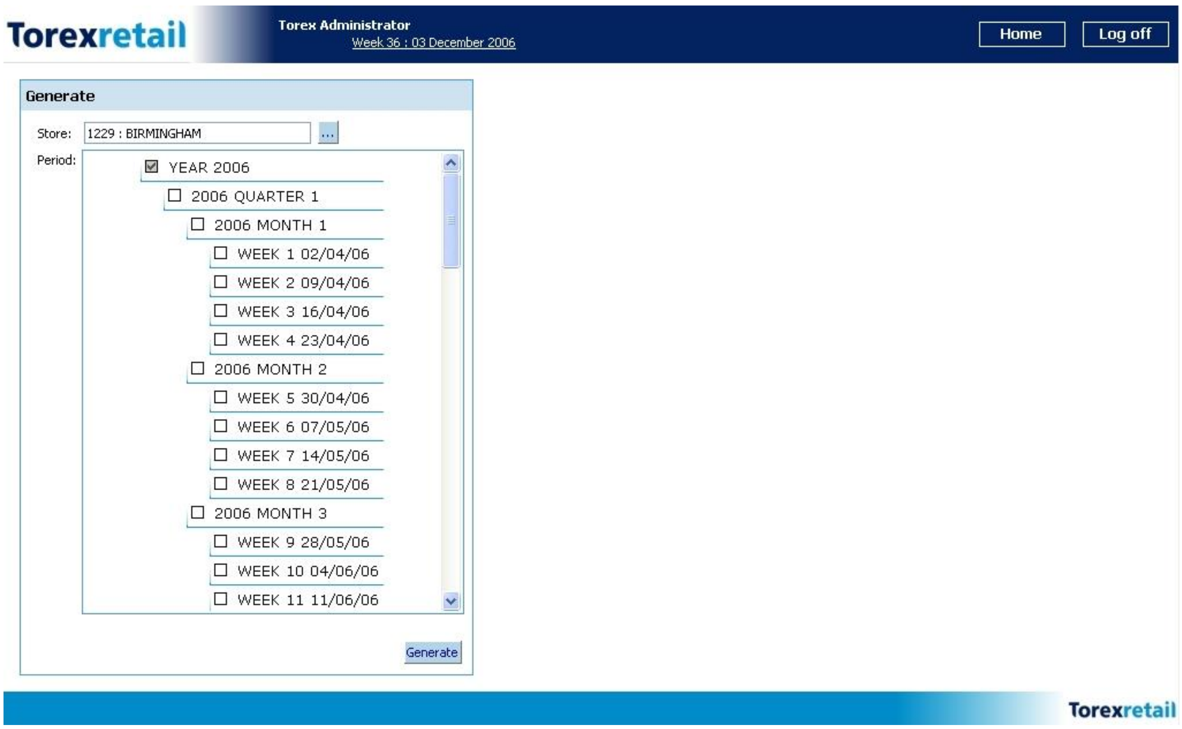
PMC Report

1. To access the **PMC Report**, click 

and then the 

.

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

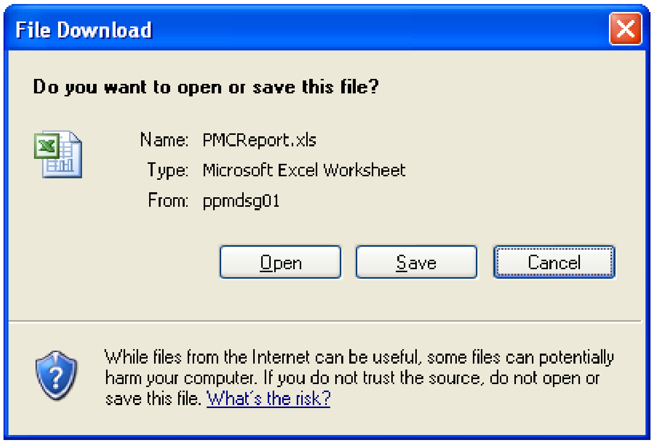


Generate a Report window

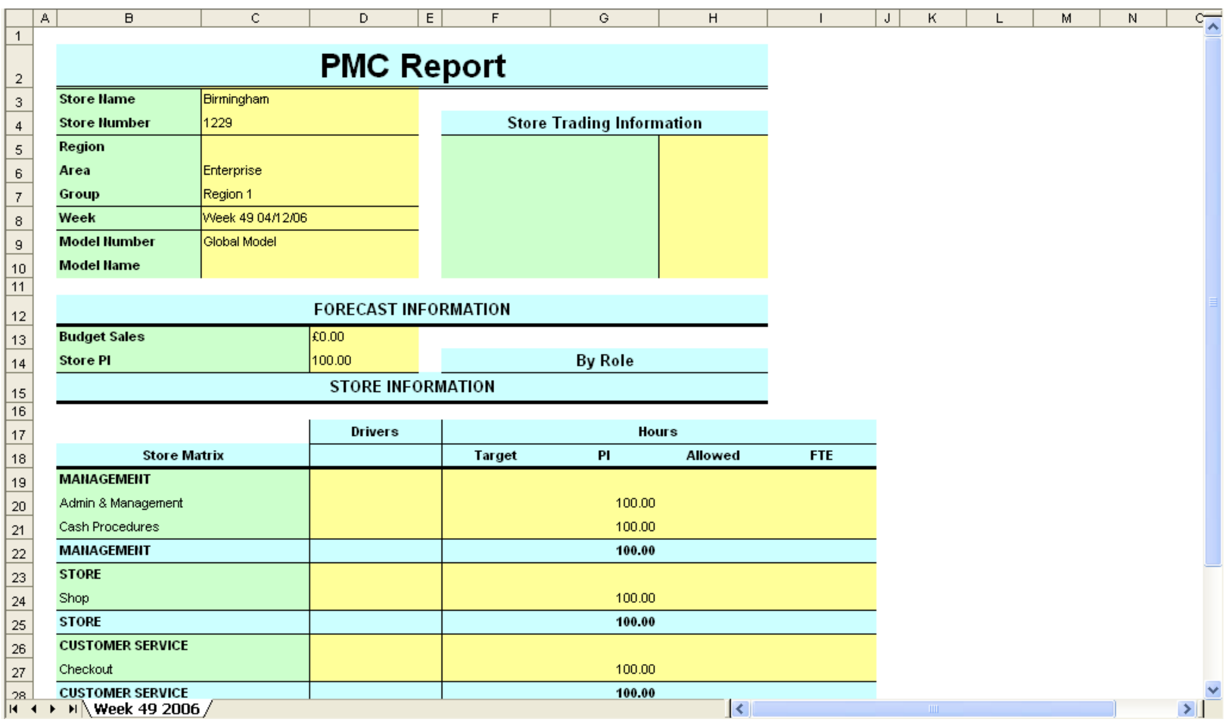
3. If the **Store** selection, at the top of the screen, is incorrect, see the **Changing the Store** section below for further information on changing the store.
4. Tick the relevant time period and then click **Generate**.

Viewing the Report

1. Once you click **Generate**, the following window will be displayed:



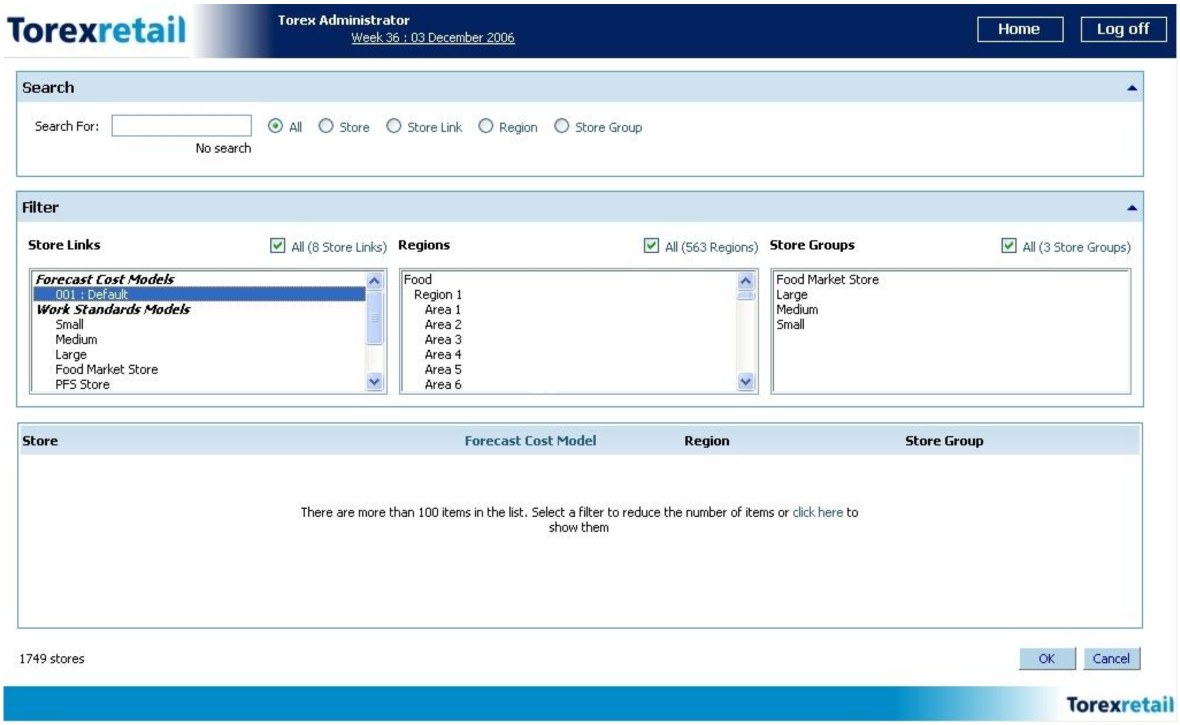
2. File Download window
3. Clicking on **Open** will display the report, for the specified period.



PMC Report window

Changing the Store

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



Changing the Store window

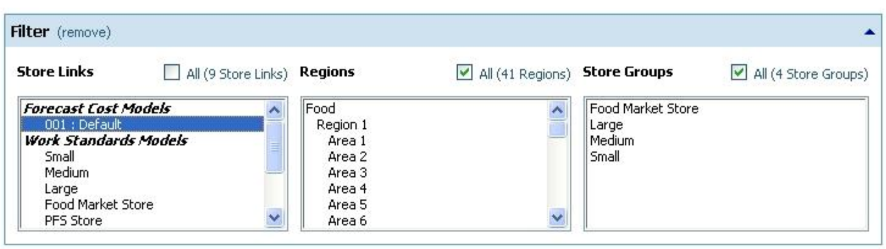
Search

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.



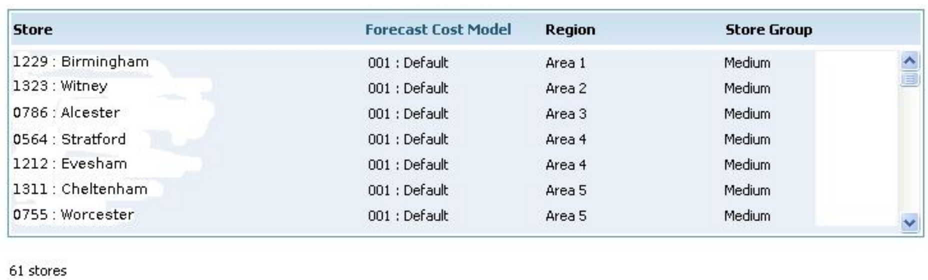
Filter window

2. To remove any Filters which have been applied, click **Remove** link, found next to the **Filter** heading 

.

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.



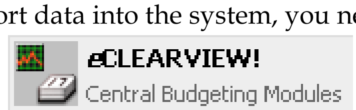
Store	Forecast Cost Model	Region	Store Group
1229 : Birmingham	001 : Default	Area 1	Medium
1323 : Witney	001 : Default	Area 2	Medium
0786 : Alcester	001 : Default	Area 3	Medium
0564 : Stratford	001 : Default	Area 4	Medium
1212 : Evesham	001 : Default	Area 4	Medium
1311 : Cheltenham	001 : Default	Area 5	Medium
0755 : Worcester	001 : Default	Area 5	Medium

61 stores

Store window

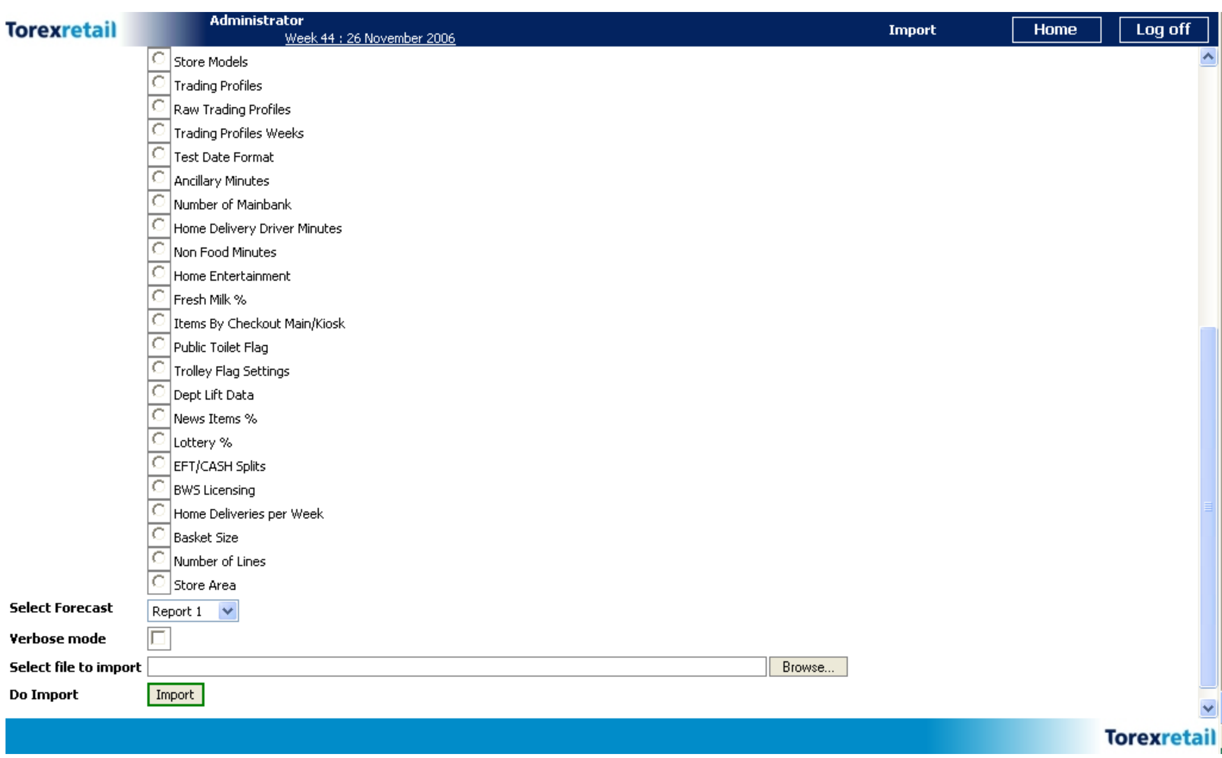
3. Once the correct company is located, click applicable name and it will become highlighted.
4. Click **OK** to confirm the selection and return to the previous screen.

Import

1. To Import data into the system, you need to access the Import area of the system by clicking 

and then the 

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

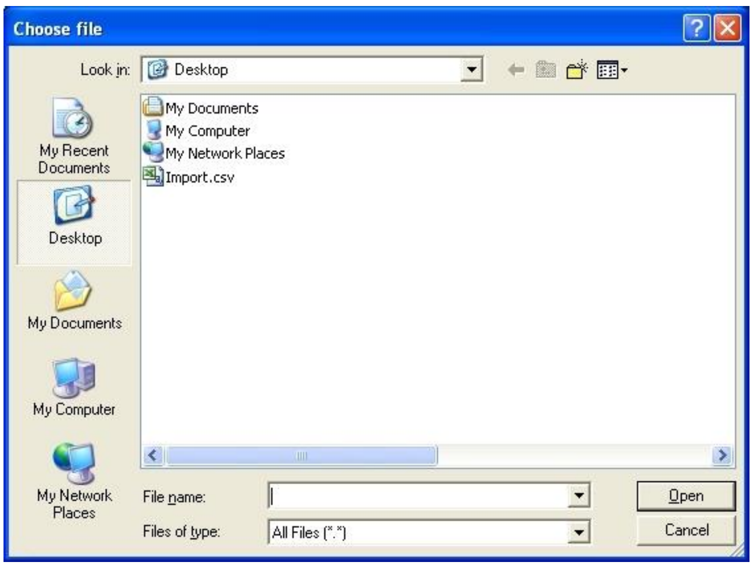


Import window

3. Select the appropriate Import file type from the list, by clicking in the circular box next to the name.

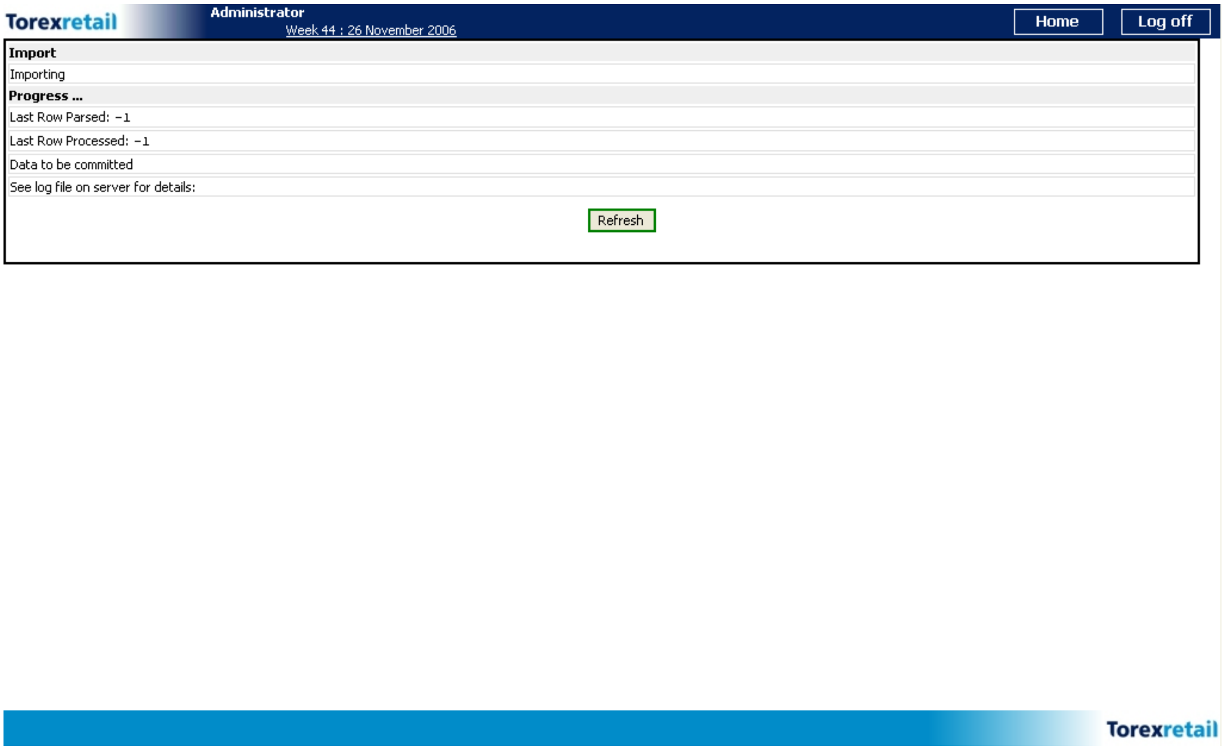
> **Note:** The list in the screenshot above may differ from what appears on your screen.

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.



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.

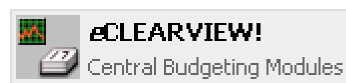
1. First export a KPI report to excel. Then open the excel report, and save as a CSV file. The report will then be in the correct format for importing into ePerformance.
2. Navigate to **eClearview > Import**, select the **Store Hours Import** radio button and the file you wish to import and click **Import**.
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.

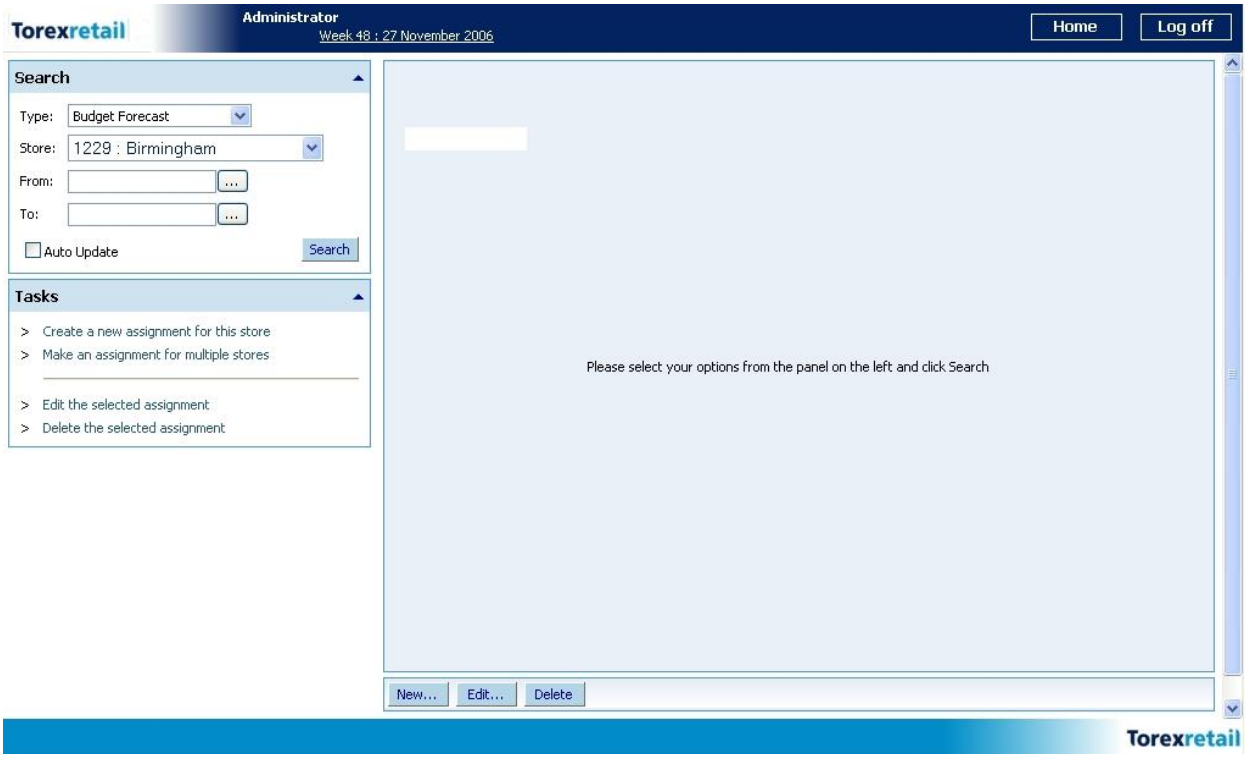
1. You must first export the data from Performance into a CSV file
2. Then navigate to **eClearview > Import**, select the **RHRP Import** radio button and the file you wish to import and click **Import**.
3. The data in the file will now be imported into the associated System Metrics, which can be viewed on a KPI report

Assign Stores

1. To access the Assign Stores area of the system, click 

, followed by the 

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



Assign Stores window

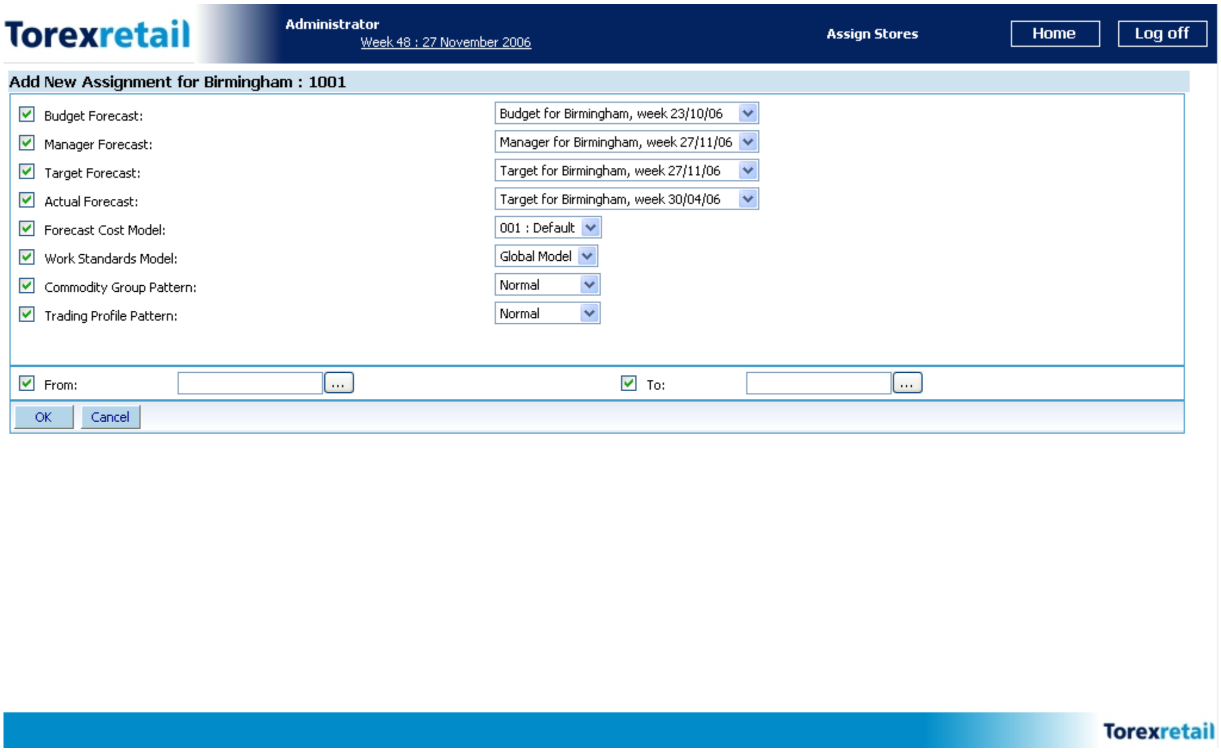
Search

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:

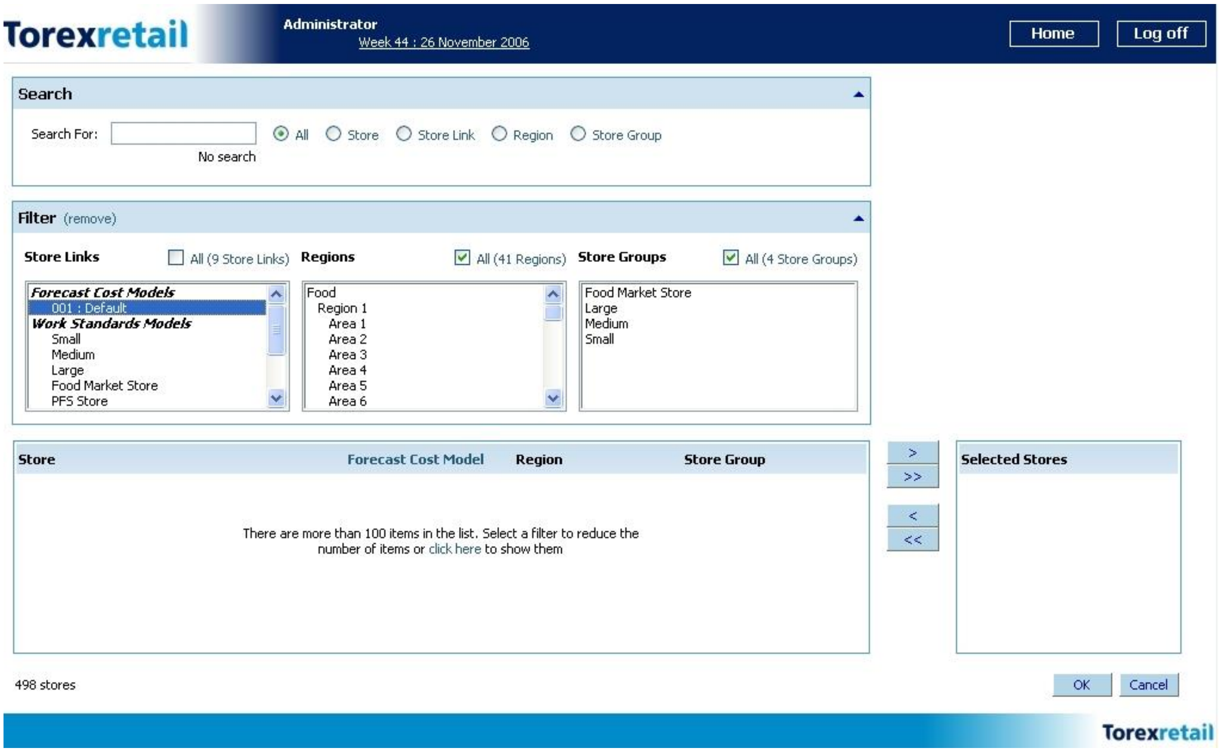


Single Store window

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:



Multiple Stores window

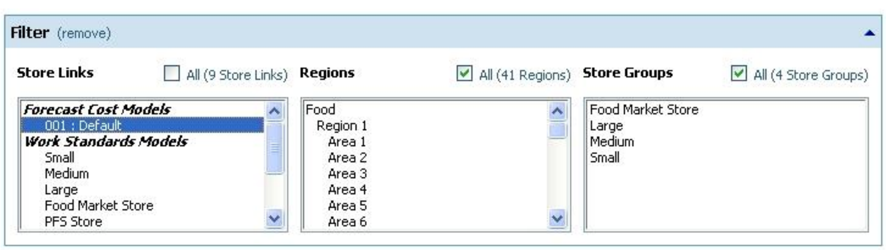
Search

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.



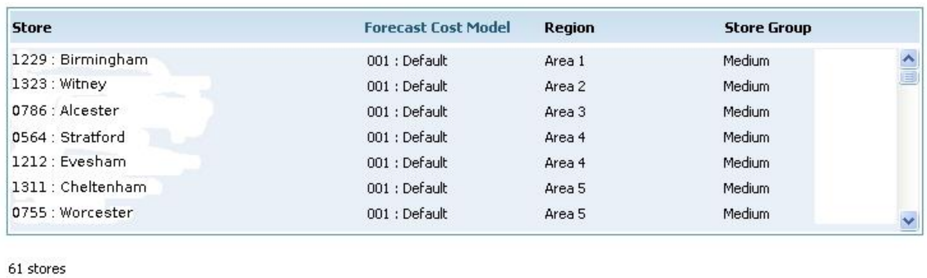
Filter window

2. To remove any Filters which have been applied, click **Remove** link, found next to the **Filter** heading 

.

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.



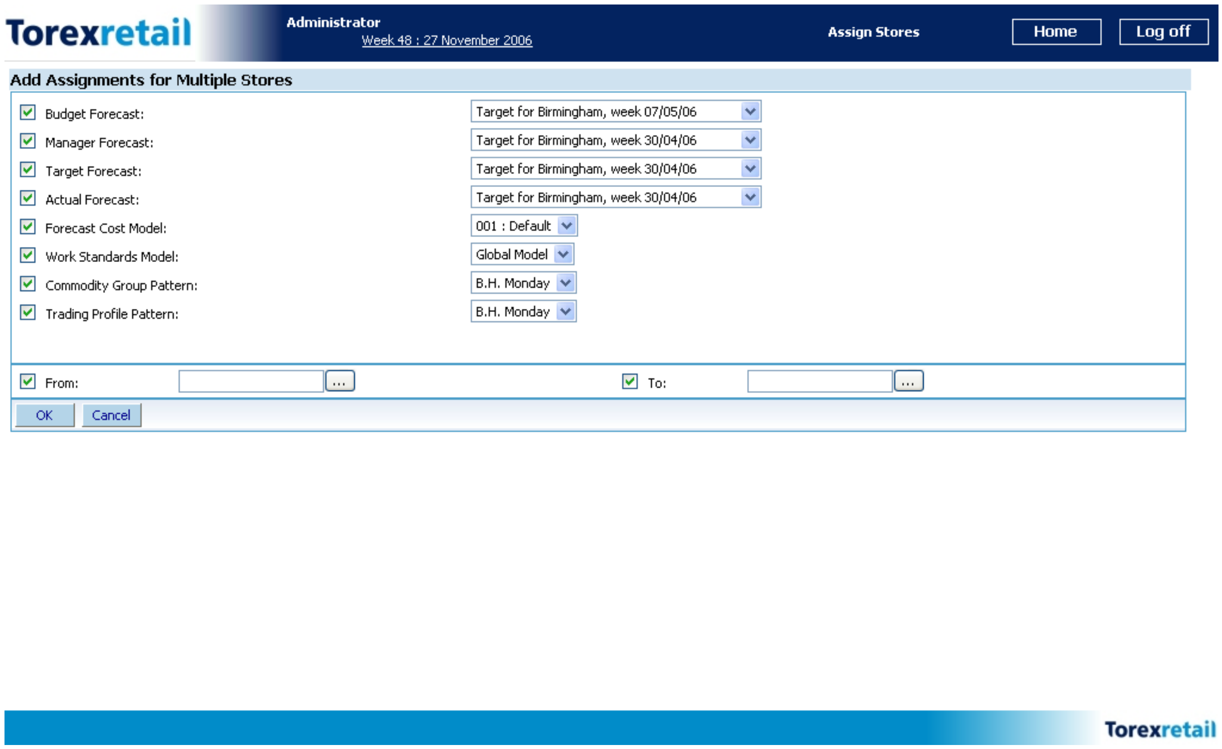
Store window

Selected Stores

Once you have the selected stores displayed in the **Store** section, you can move them into the **Selected Stores** section.

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.



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

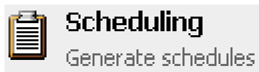
1. To view the Store Groups screen, click **Store Groups**.
2. Further information on this screen can be found on page 353.

Select Fileset

1. To view the Select Fileset screen, click **Select Fileset**.
2. Further information on this screen can be found on page 353.

7

Scheduling

1. To access the Scheduling area of the system, log on as normal and click 

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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:

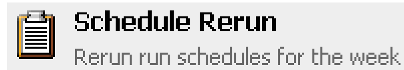
- Need Skilled – Where a solution leaves the number of skilled employees (i.e. not apprentices) scheduled to a task below the workload
- Working When No Work (Jobless) – Where a solution places an employee on a task which is closed (outside of operating windows)
- Closure – Where a solution causes a 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

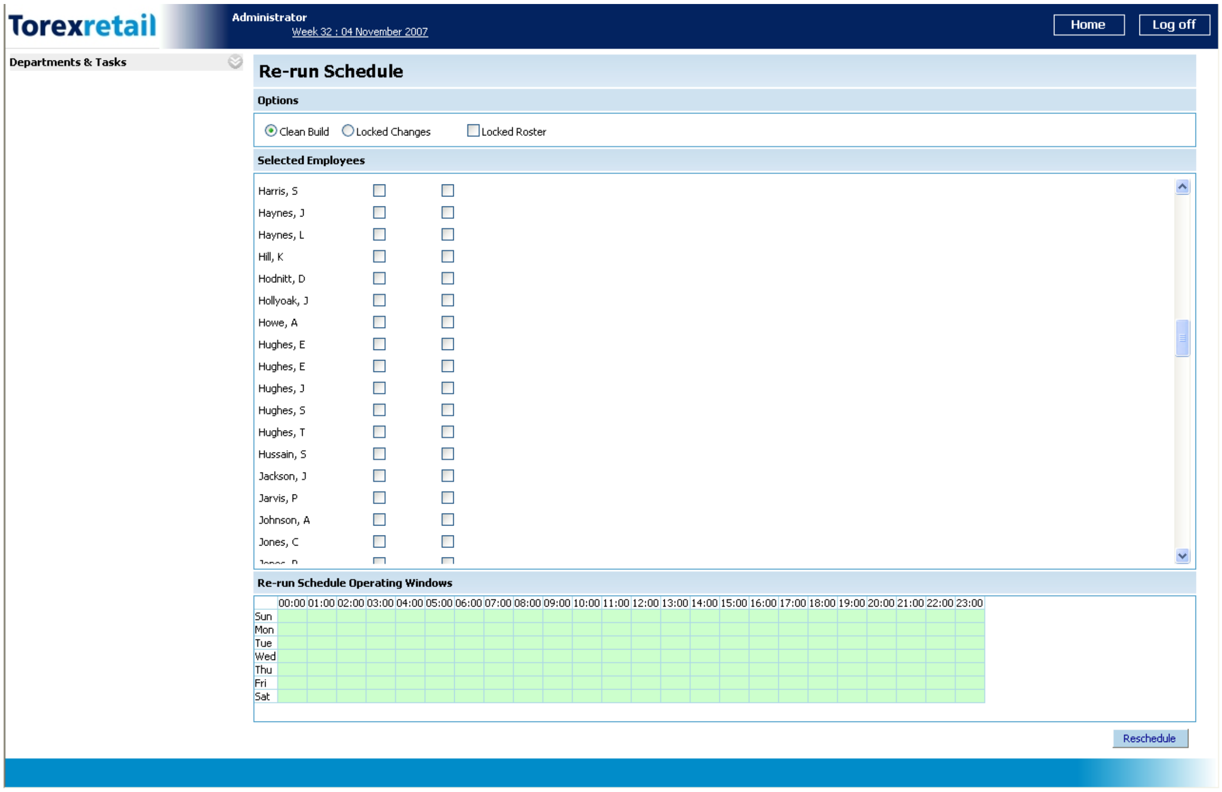
The weightings are set in the configuration file **SCHEDULE WEIGHTING.INI**, the higher the weighting the more important the scheduler will consider it to avoid. For example, setting Unders = 20 and Overs = 10, will make Unders twice as undesirable as Overs. Therefore if the scheduler generates 2 solutions, 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.

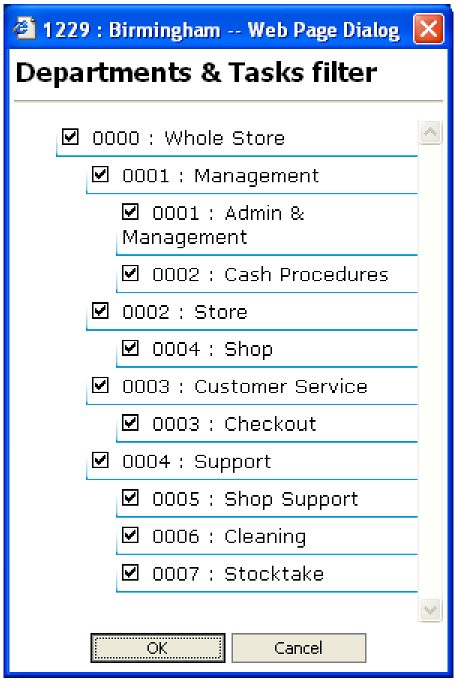
Schedule Rerun

1. To begin a Schedule Rerun, click 
.
2. A screen, similar to that below, will be displayed:



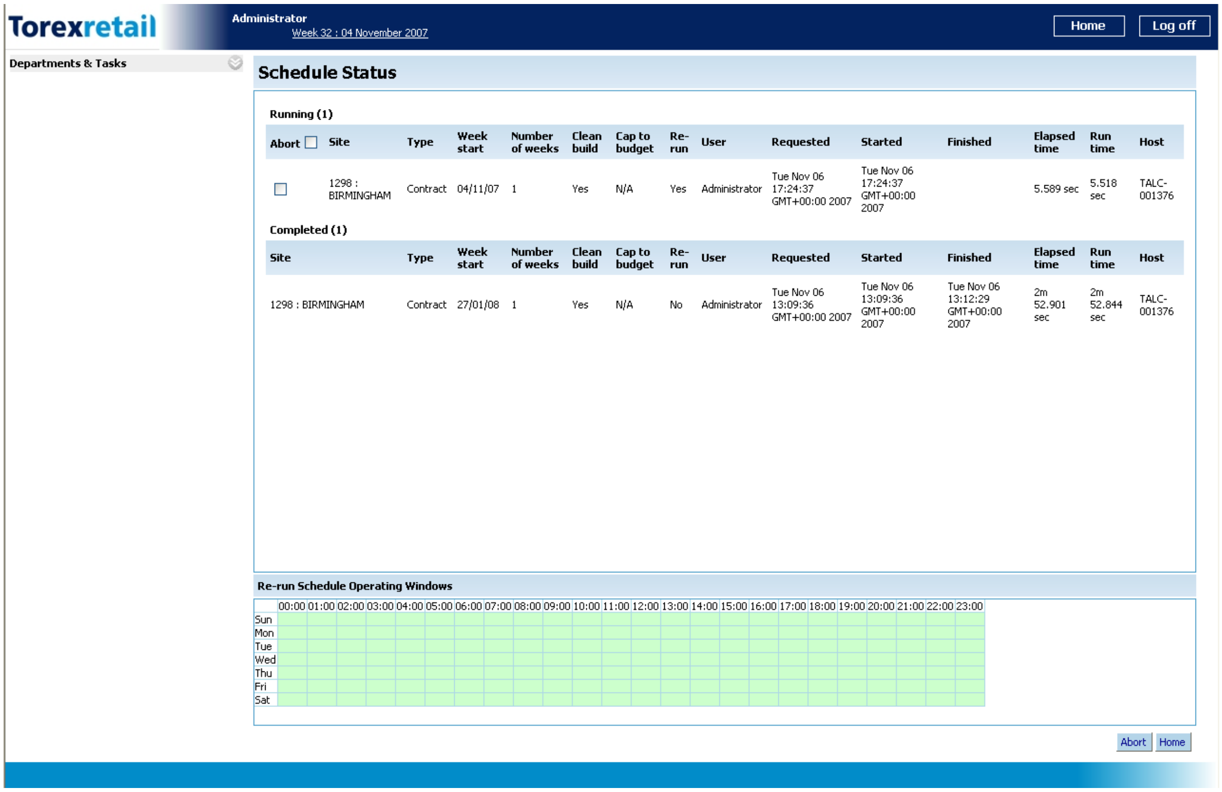
Re-run Schedule window

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 manger 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.

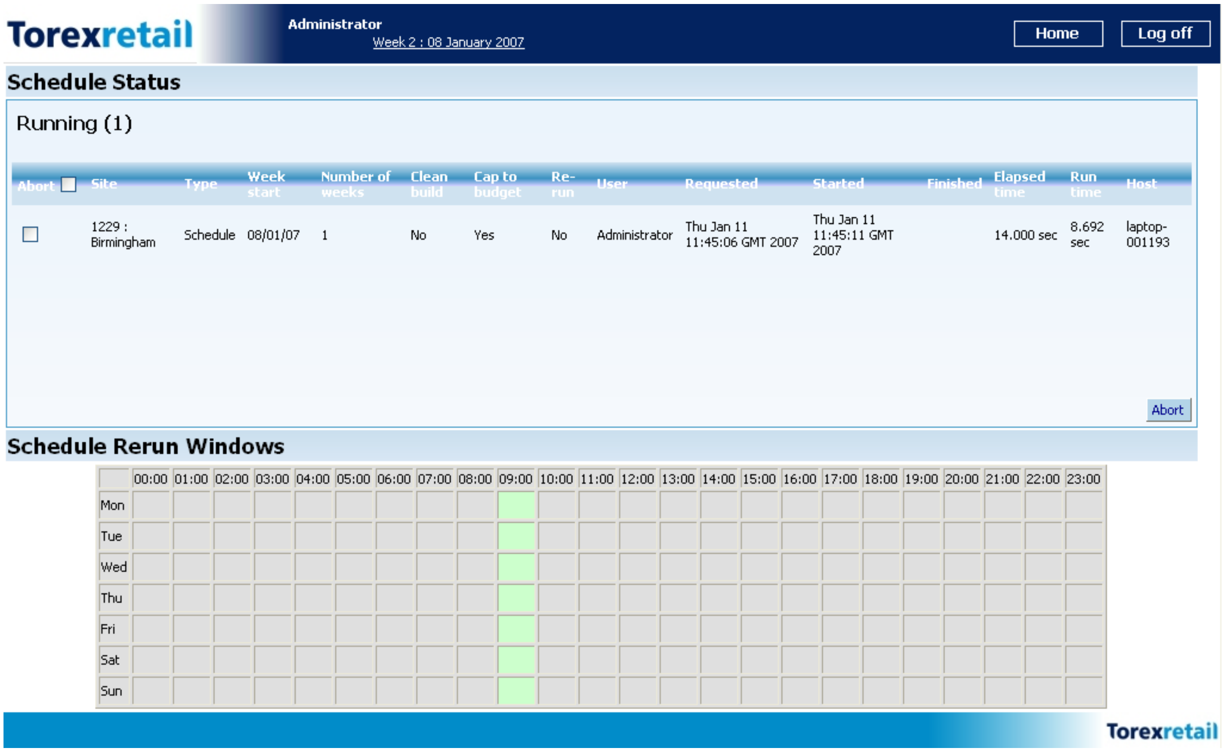


Schedule Status window

Schedule Window Status

1. To view the Schedule Window Status, click 

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



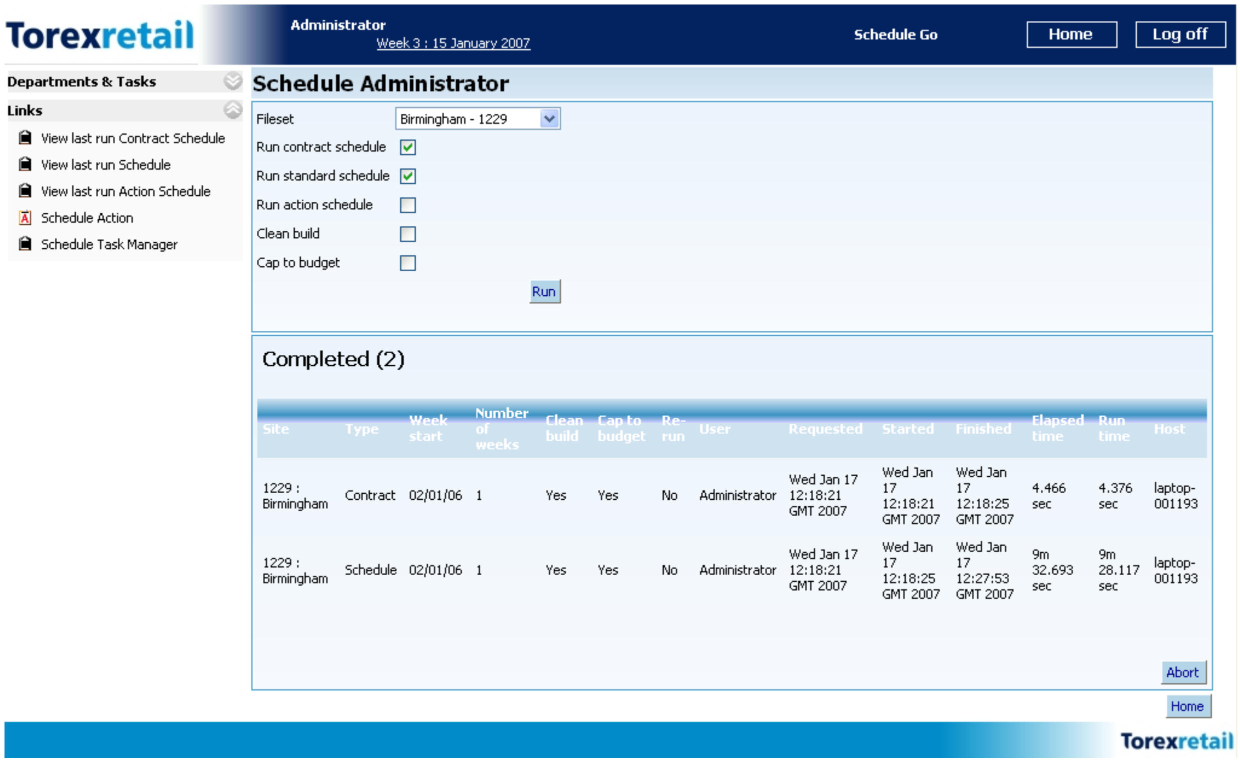
Schedule Status window

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

1. To view the Schedule Go screen, click 

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



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

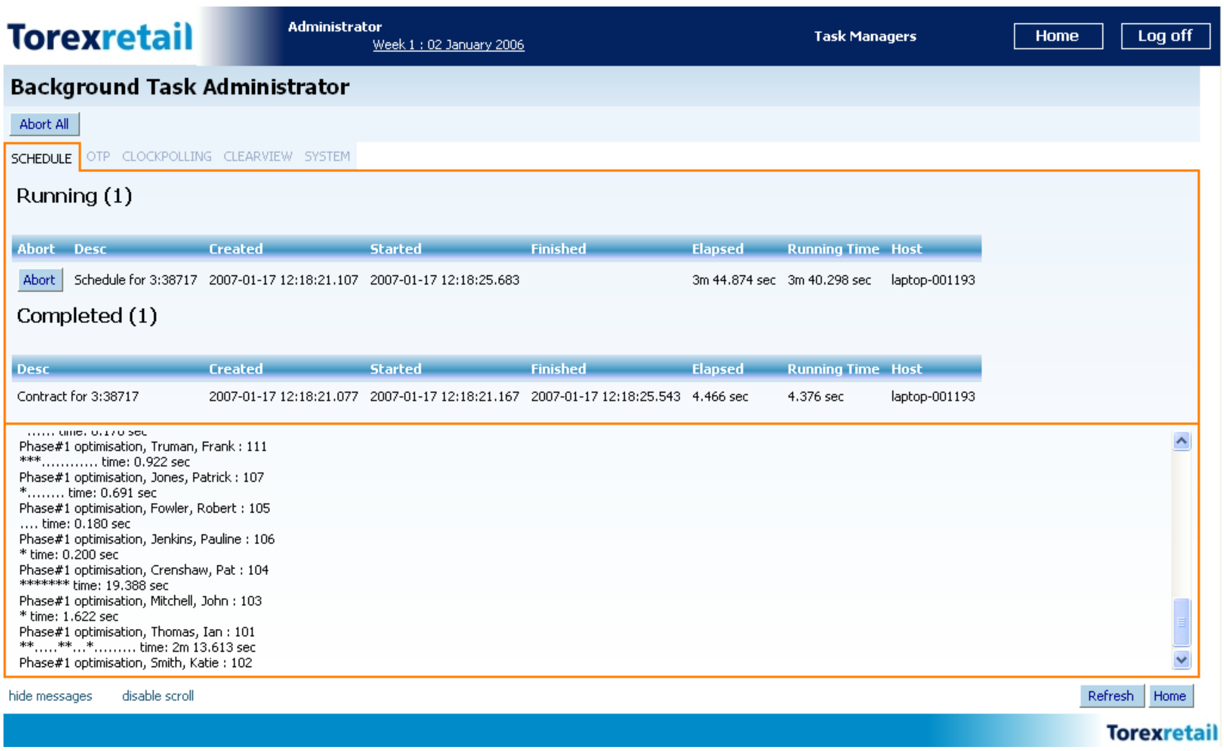
1. Clicking link **View last run Contract Schedule**, will display summary information on the last Contract Schedule to be run by the system
2. Click link **return to Schedule Go**, in the top left hand corner, to return to the previous screen.

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 of have been completed.



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.

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

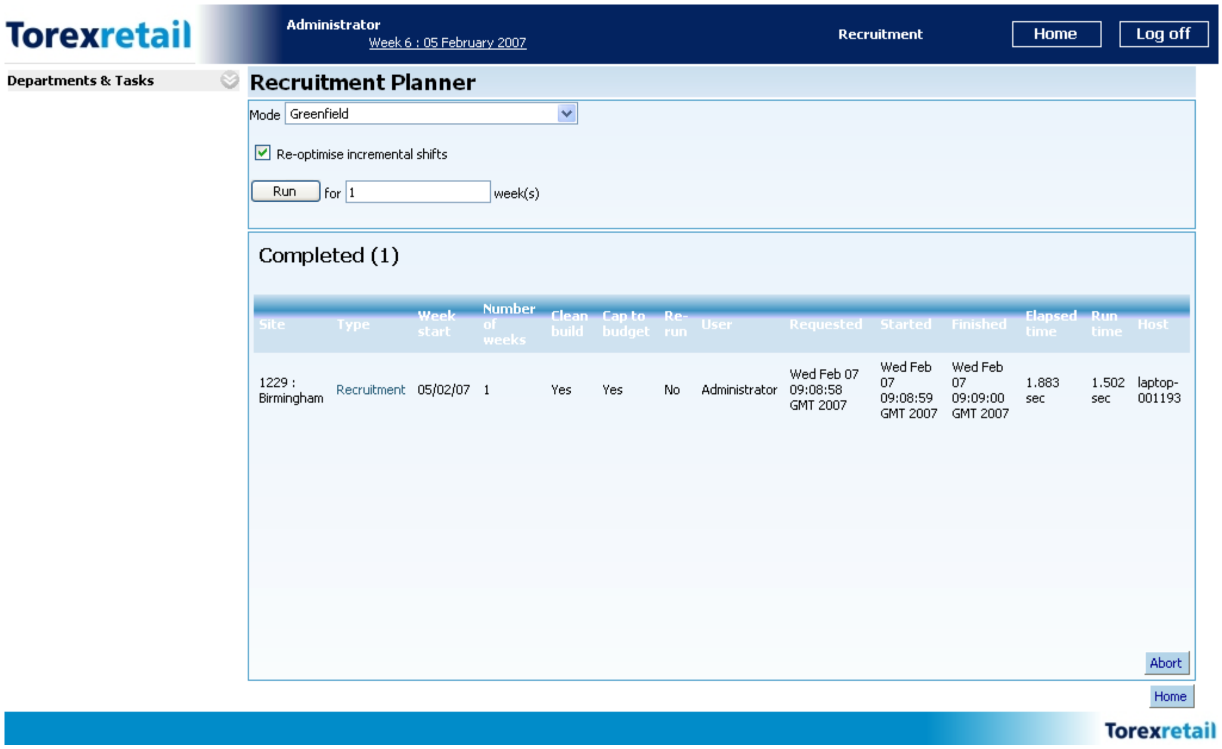
1. To view the recruitment screen, click 

.

Recruitment

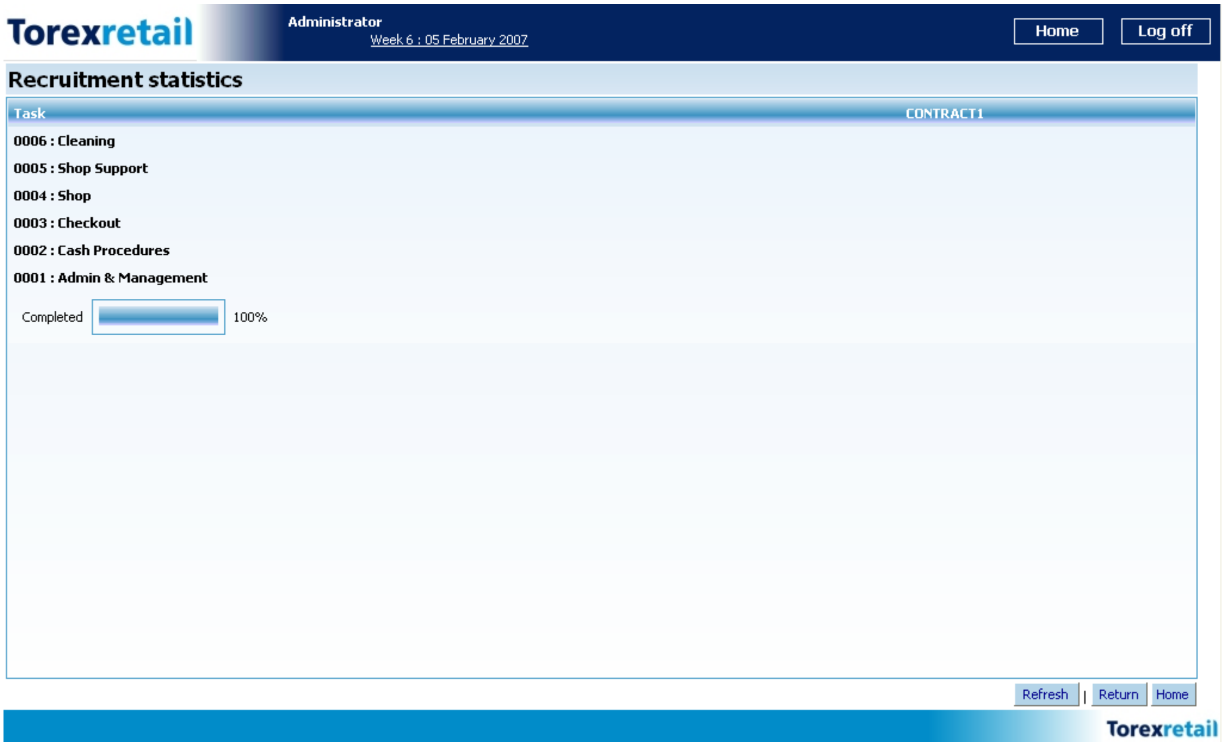
1. To view the Recruitment screen, click 

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



Recruitment Planner 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.

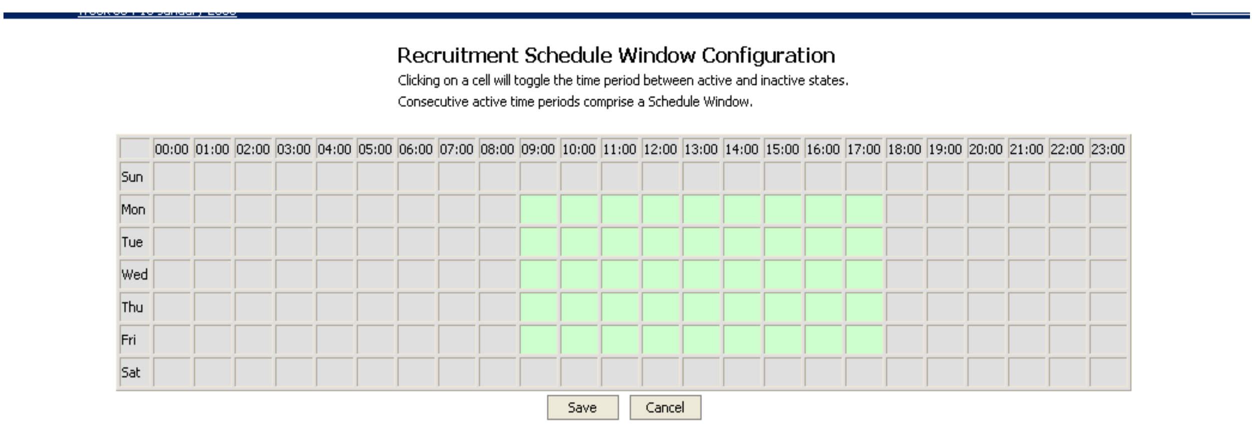


Recruitment Statistics window

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:



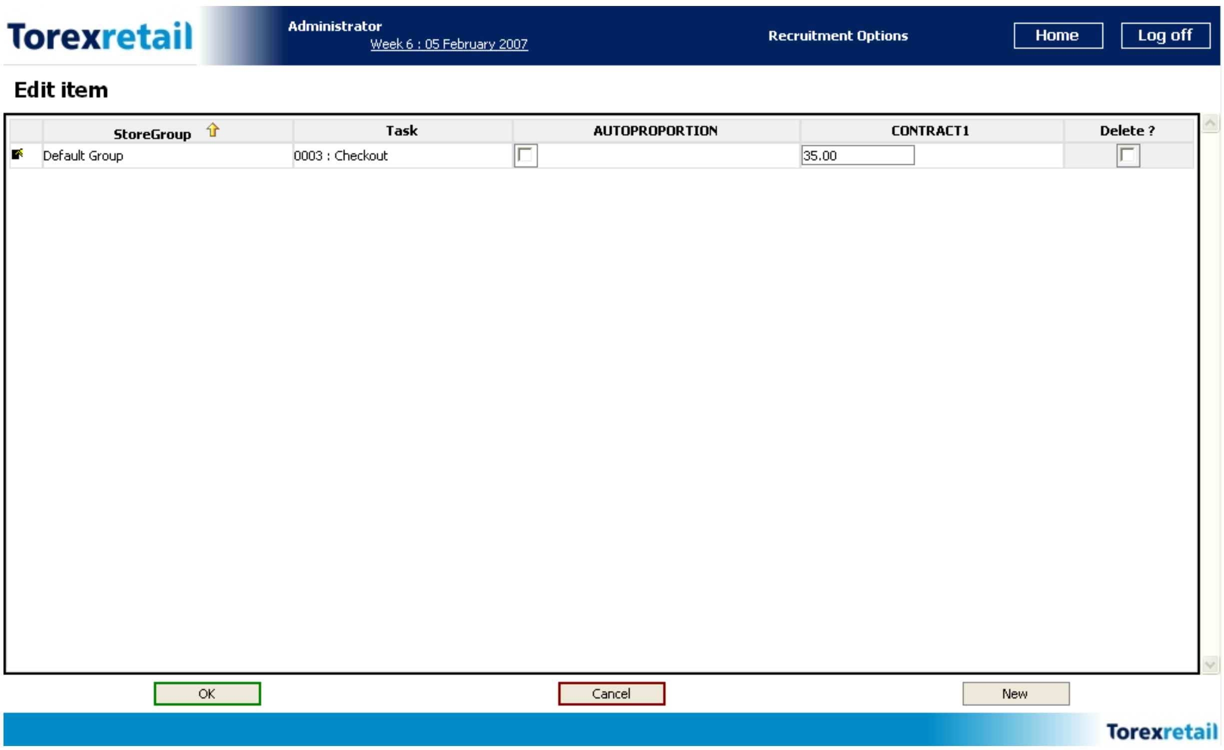
Recruitment Schedule window

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

1. To view the Recruitment Options screen, click 

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



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.

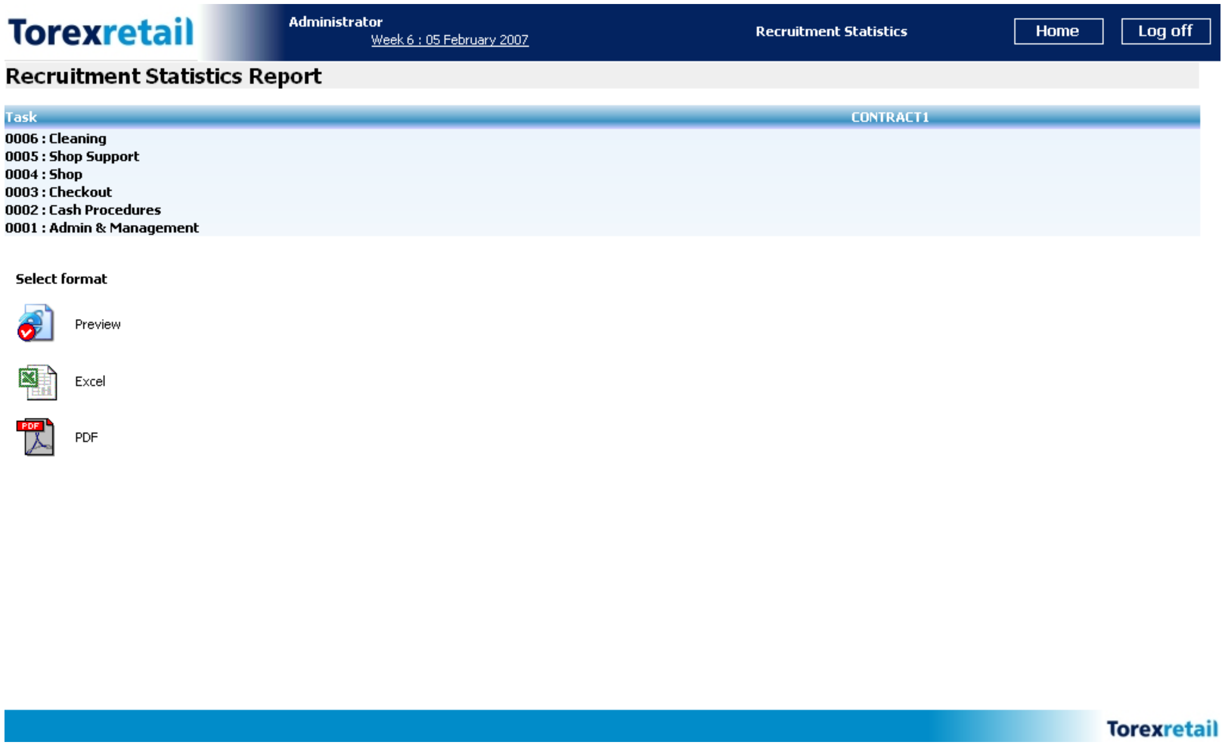
Delete an Item

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

1. To view the Recruitment Statistics screen, click 

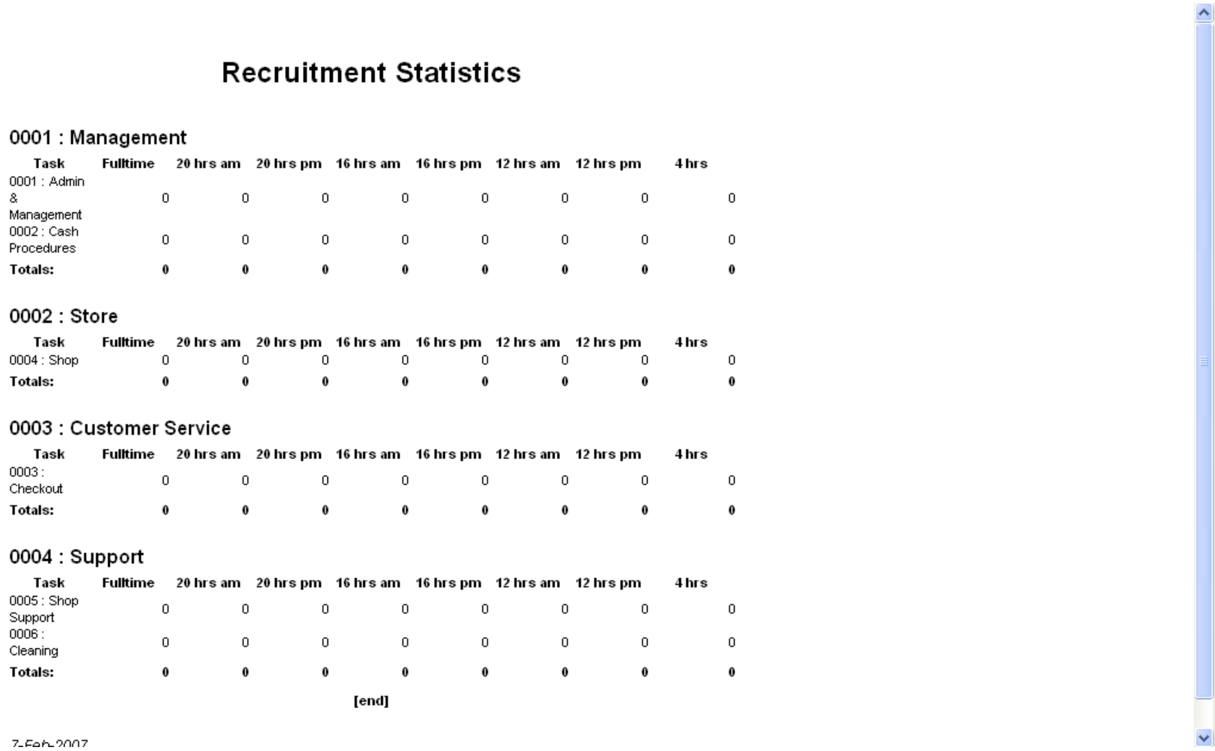
.
2. A screen, similar to that below, will be displayed:



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
Totals:	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**

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
Totals:	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**

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
Totals:	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**

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
Totals:	**0**	**0**	**0**	**0**	**0**	**0**	**0**	**0**

[end]

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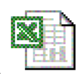
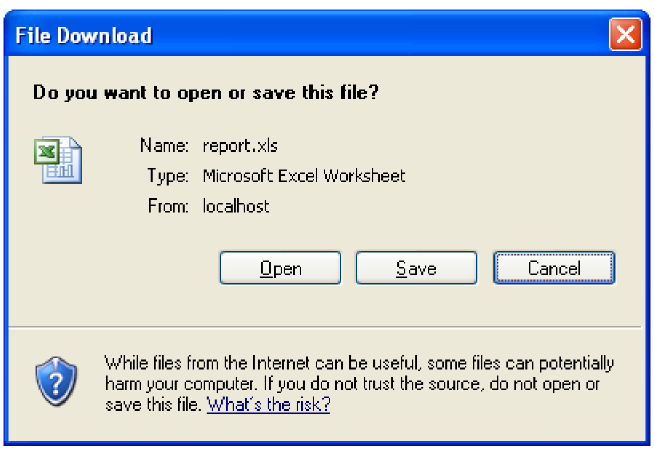
Recruitment Statistics window

Output to Excel

1. To view or save the report as a Microsoft Excel file, click  icon.

2. A Window will be displayed:



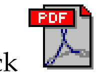
File Download window

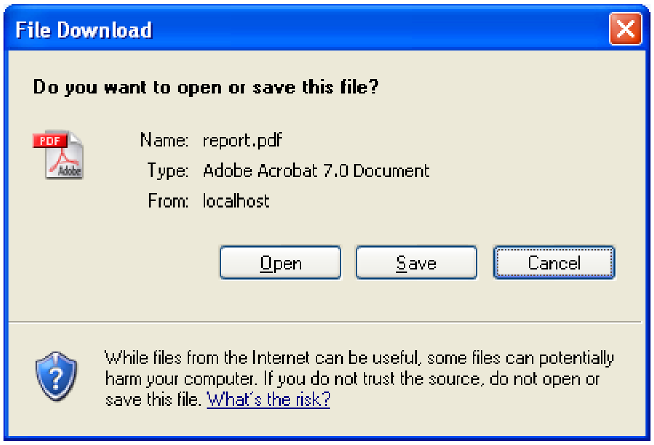
3. Click **Open** to open the report into Excel.

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.

Output to PDF

1. To view or save the report as an Adobe Acrobat PDF format, click  icon.
2. A window will be displayed:



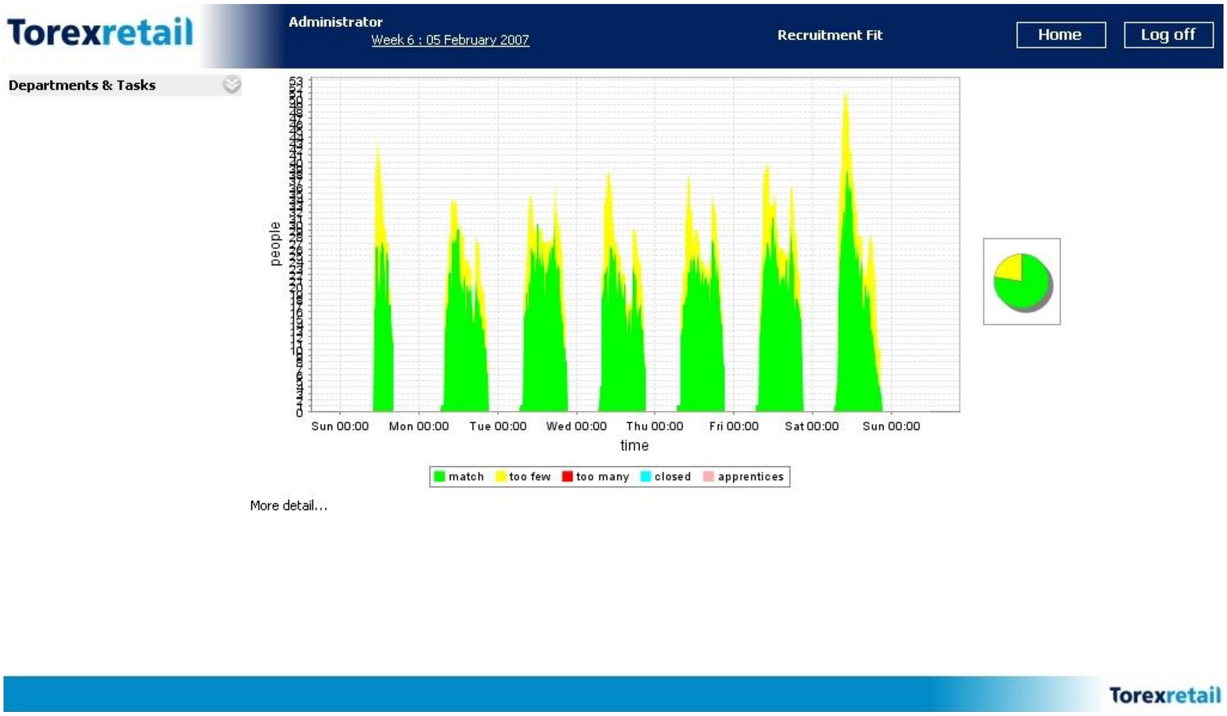
File Download window

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 

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



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


.

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

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

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

Department Recruitment Schedule Report window

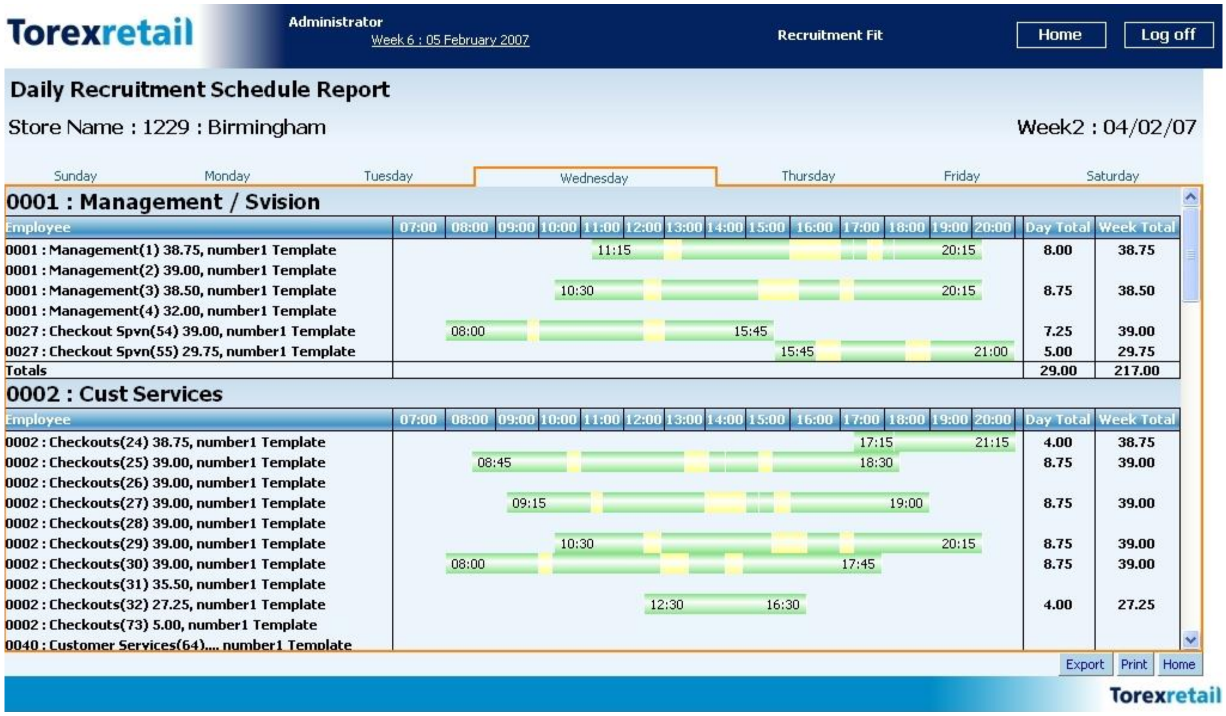
3. To export the report to Adobe Acrobat PDF format, click **Export**.
4. To print the report, click **Print**.

Recruitment Daily Shifts Report

1. To view the Recruitment Daily Shifts Report, click

.

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

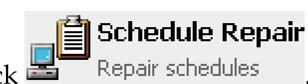


Daily Recruitment Schedule Report window

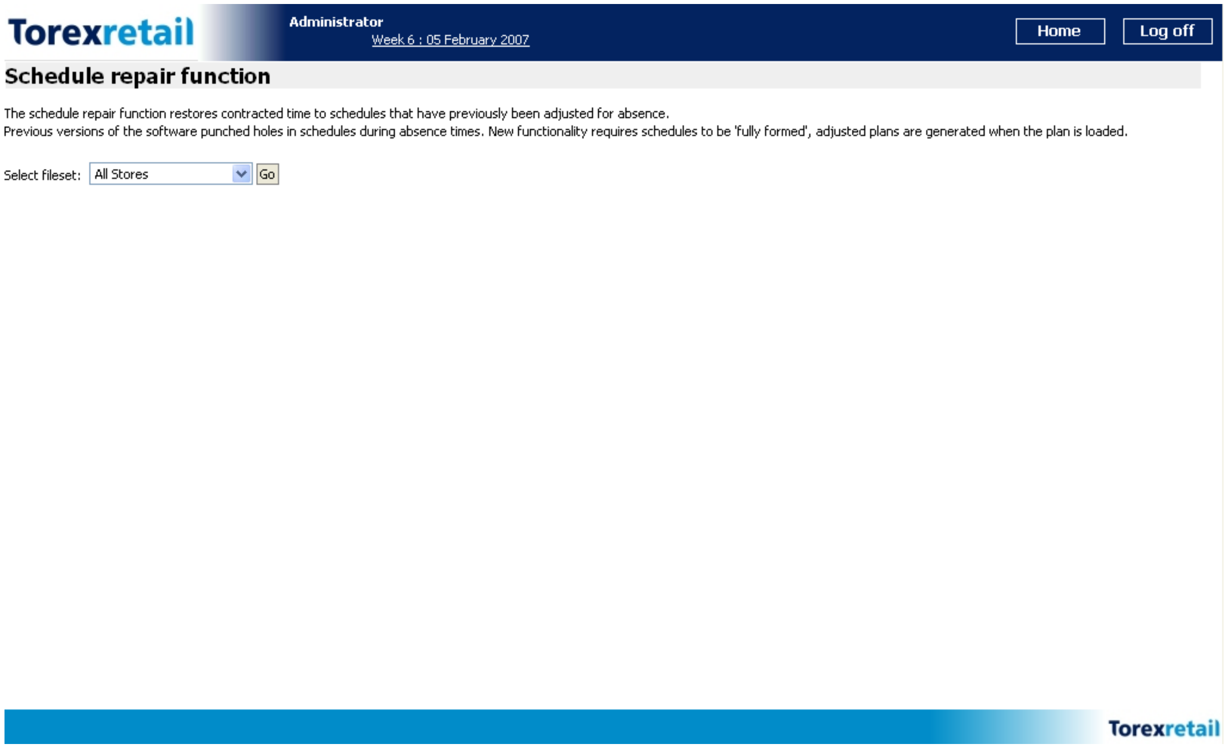
3. To view the different days, click relevant names at the top of the screen.
4. To export the report to Adobe Acrobat PDF format, click **Export**.
5. To print the report, click **Print**.

Schedule Repair

The schedule repair function restores contracted time to schedules that have previously been adjusted for absence.

1. To access the Schedule Repair screen, click 

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



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 3rd 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 abscences 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.

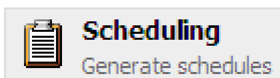
In all cases, the XML file will be generated in the background. Once complete, it will be copied in to the system default folder. The default file name will follow the structure **planexport{yyyyMMddHHmmss}.xml** for example, planexport20060816160902.xml. This date/time prefix will correspond to the 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.

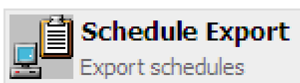
When the export is taking place, the system will check each record to ascertain which information has been updated or created. Only this updated information will be exported from the system, into the XML file.

Running an Export

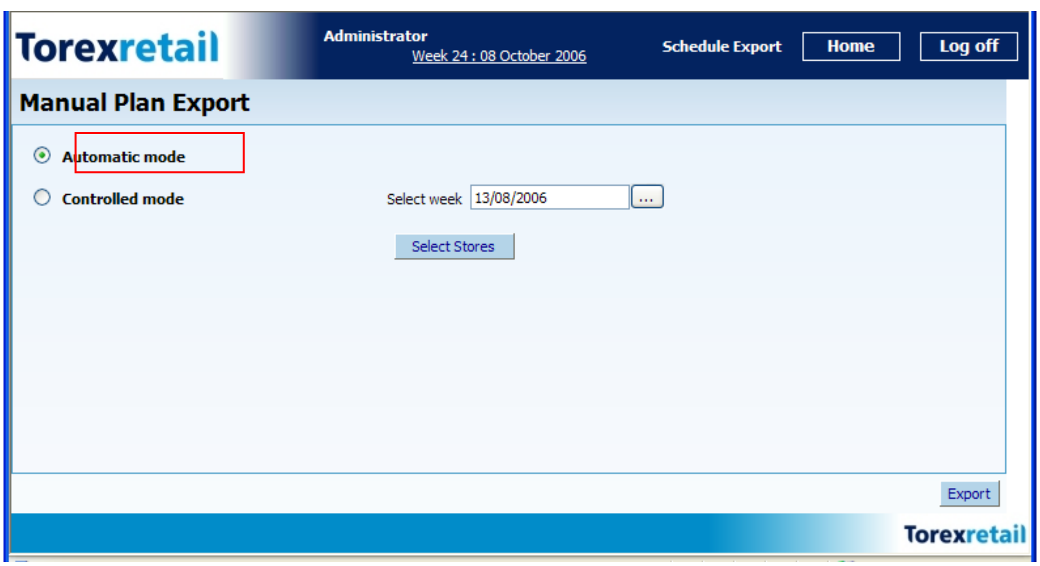
Automatic Mode

To extract the default information, pre-configured for your system, follow the steps below:

1. Log into the software as usual.
2. Click 

.
3. Then click 

.
4. Ensure **Automatic mode** is selected, as shown below:

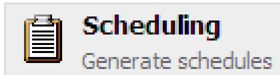


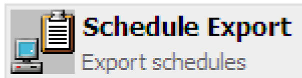
Automatic Mode window

5. Click **Export**.
6. If any Employee plans have been added or modified, an XML file will be exported to your default system location.

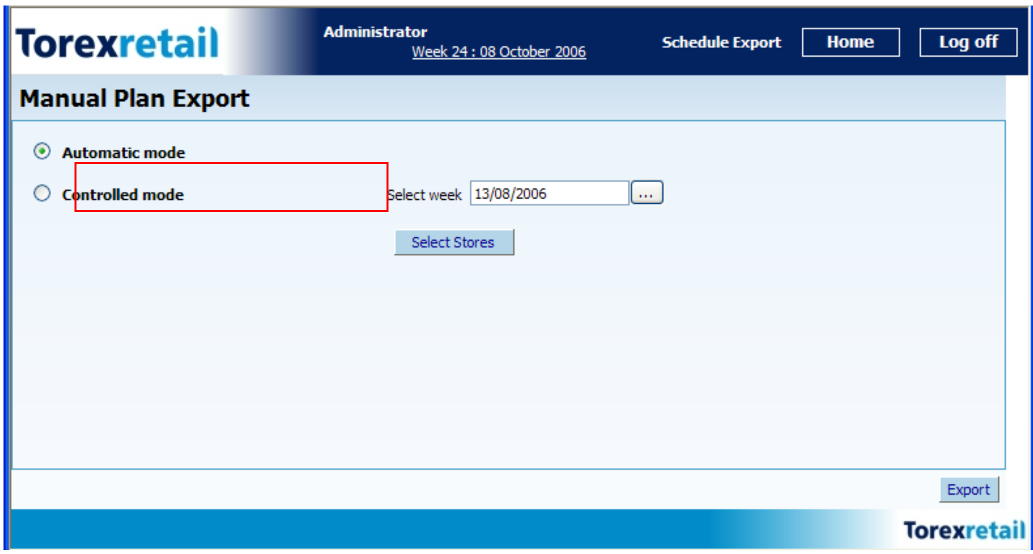
Controlled Mode

To extract the default information, pre-configured for your system, follow the steps below:

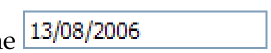
1. Log into the software as usual.
2. Click 

.
3. Then click 

.
4. Ensure **Controlled mode** is selected, as shown below:

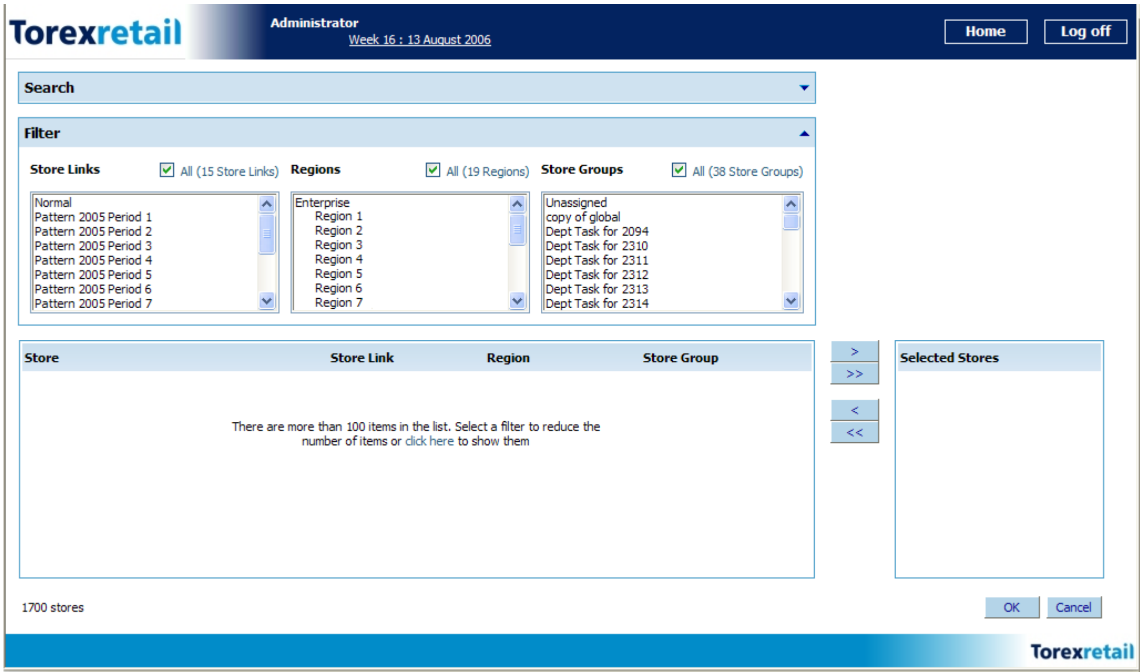


Controlled Mode window

5. To select a week, either:
   – Type in the relevant date into the 

 field (the date will default to the 1st 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,

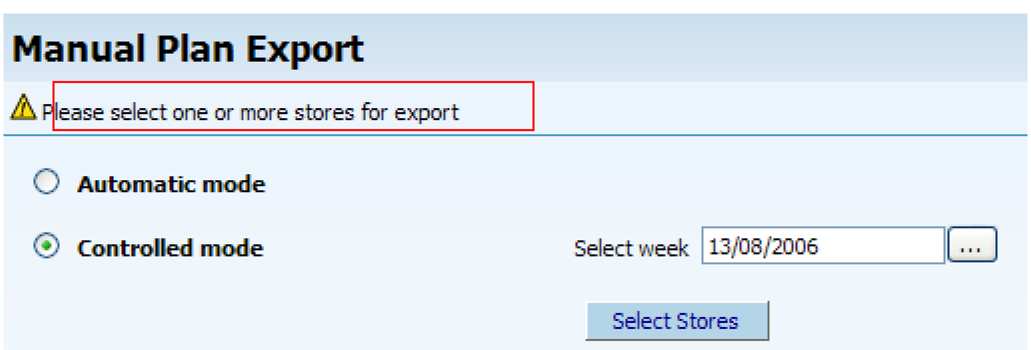
   will move the highlighted store(s) into the **Selected Stores** list.

   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**.



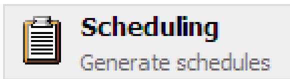
Manual Plan Export window

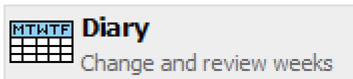
9. If any Employee plans have been added or modified, an XML file will be exported to your default system location.

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.
2. Click 

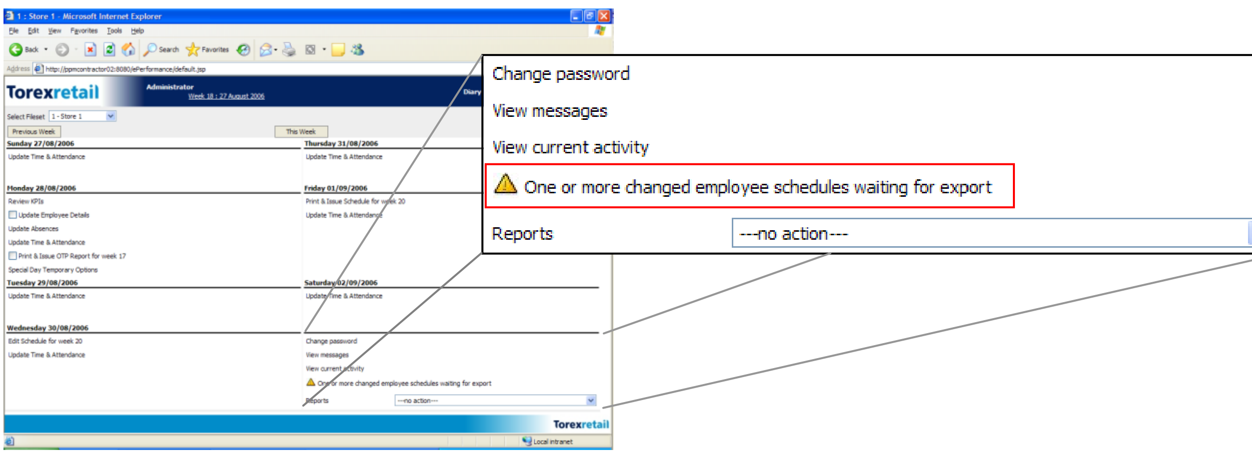
.
3. Then click 

.

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.

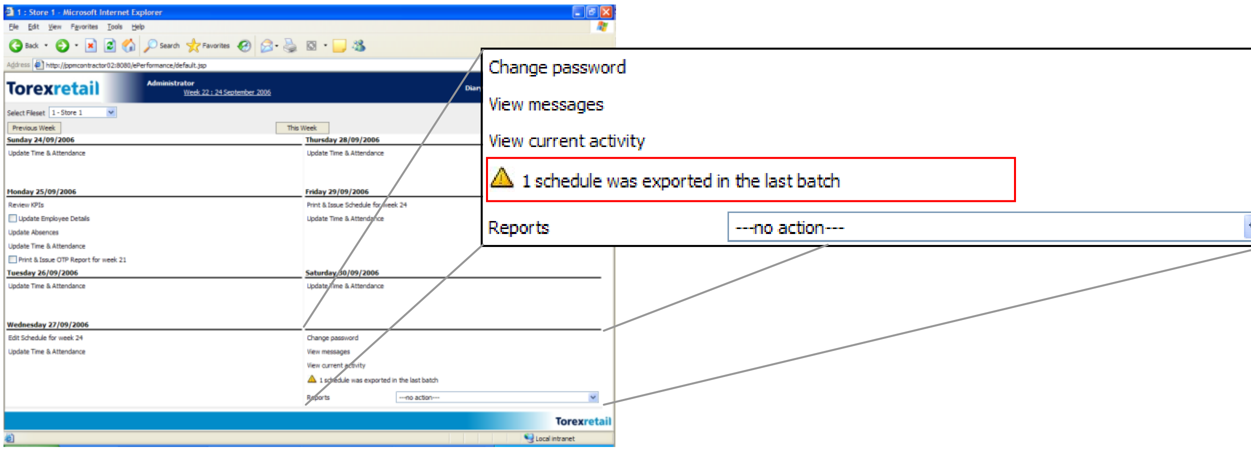


Pre-Export window

Post Export

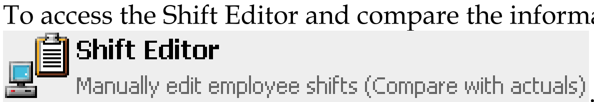
A message will be displayed in the current users' diary stating that **x schedule was exported in the last batch**. **X** represents the number of employee plans.

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.

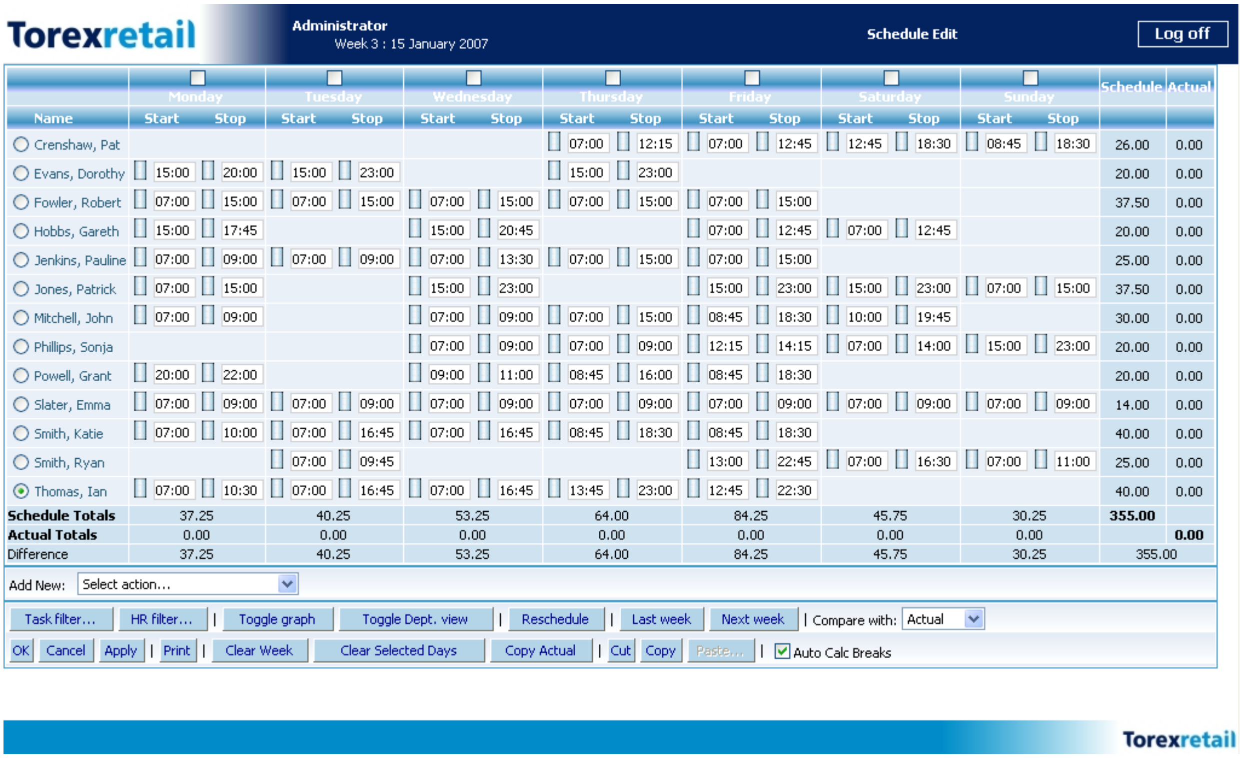


Post Export window

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:



Shift Editor window

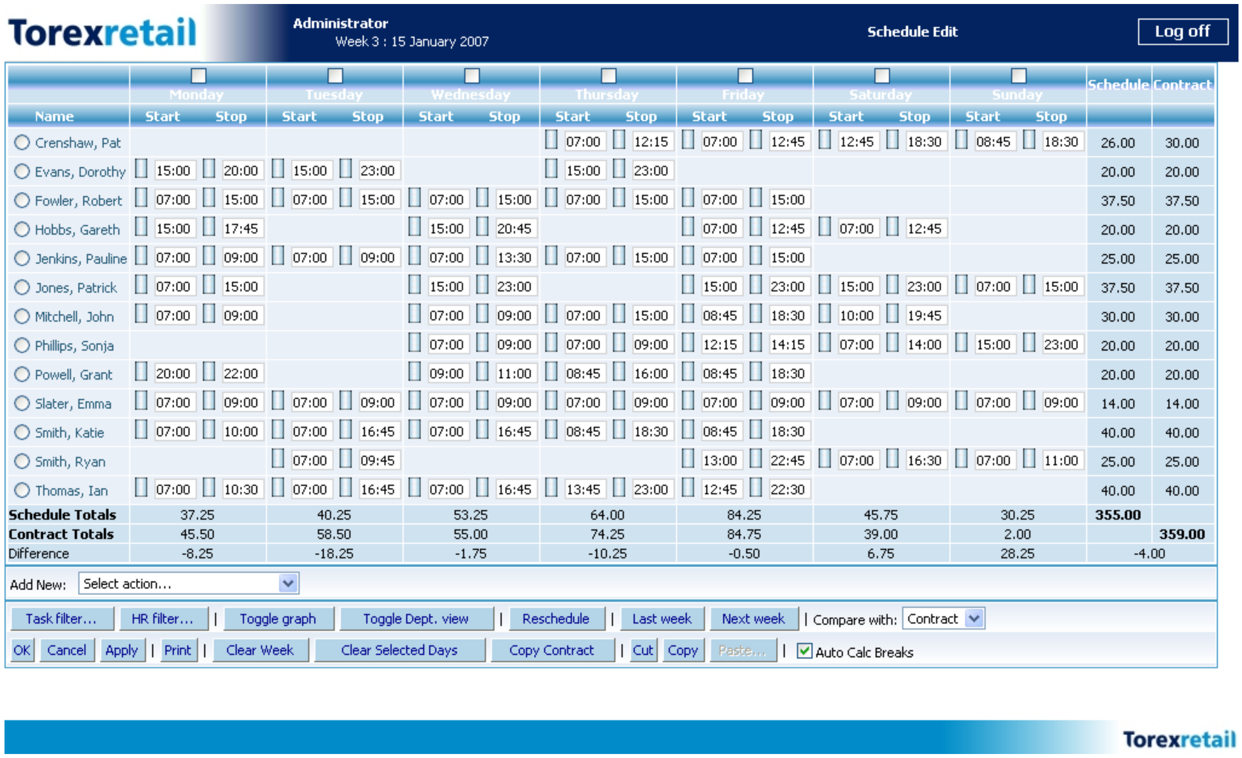
3. By default, this screen compares the Scheduled hours to the Actual hours worked.
4. For further information on using this screen, see page 229.

Shift Editor (Compare with Contract)

1. To access the Shift Editor and compare the information with the contract, click

.

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

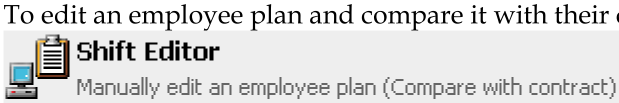


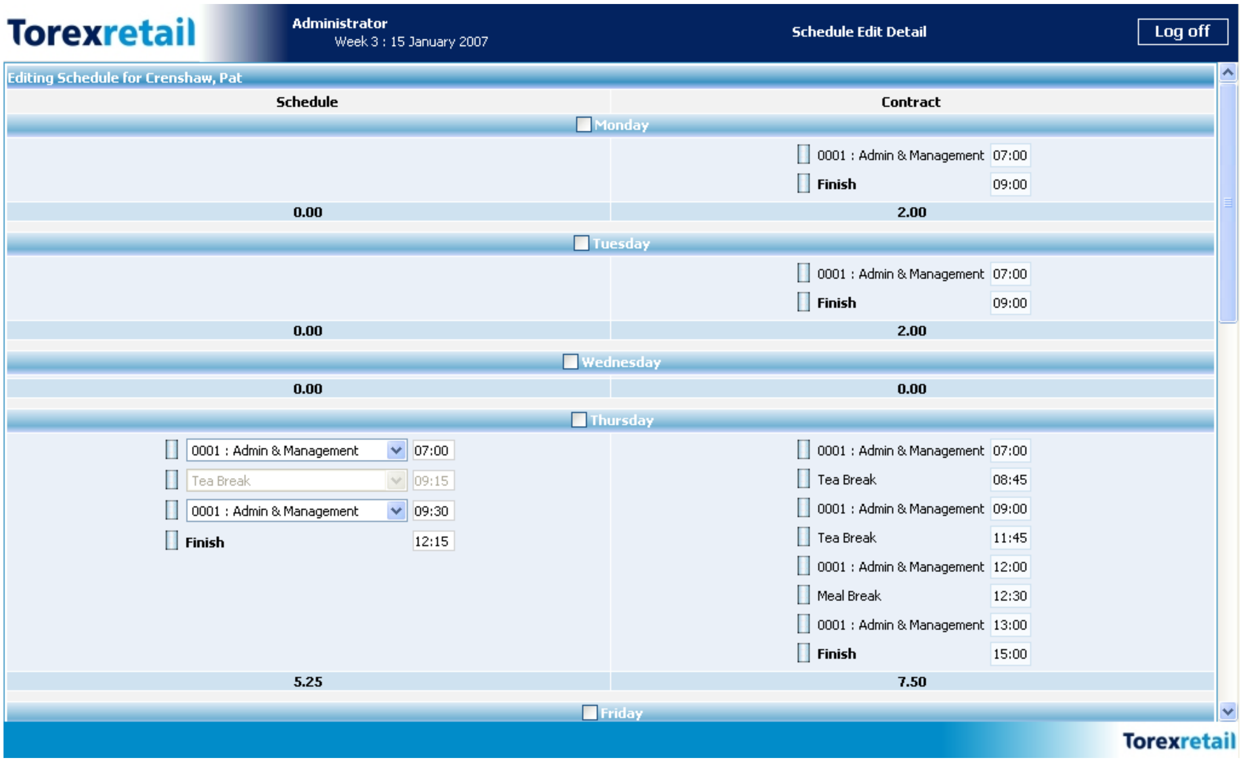
	Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Sunday		Schedule	Contract
Name	Start	Stop	Start	Stop	Start	Stop	Start	Stop	Start	Stop	Start	Stop	Start	Stop		
Crenshaw, Pat							07:00	12:15	07:00	12:45	12:45	18:30	08:45	18:30	26.00	30.00
Evans, Dorothy	15:00	20:00	15:00	23:00			15:00	23:00							20.00	20.00
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
Hobbs, Gareth	15:00	17:45			15:00	20:45			07:00	12:45	07:00	12:45			20.00	20.00
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
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
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
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
Powell, Grant	20:00	22:00			09:00	11:00	08:45	16:00	08:45	18:30					20.00	20.00
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
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
Smith, Ryan			07:00	09:45					13:00	22:45	07:00	16:30	07:00	11:00	25.00	25.00
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
Schedule Totals	37.25		40.25		53.25		64.00		84.25		45.75		30.25		**355.00**	
Contract Totals	45.50		58.50		55.00		74.25		84.75		39.00		2.00			**359.00**
Difference	-8.25		-18.25		-1.75		-10.25		-0.50		6.75		28.25		-4.00	

Shift Editor window

3. By default, this screen compares the Scheduled hours to the Contracted hours worked.
4. For further information on using this screen, see page 229.

Shift Editor (Employee Plan - Compare with Contract)

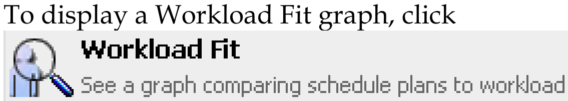
1. To edit an employee plan and compare it with their contracted hours, click 
.
2. A screen, similar to that below, will be displayed:



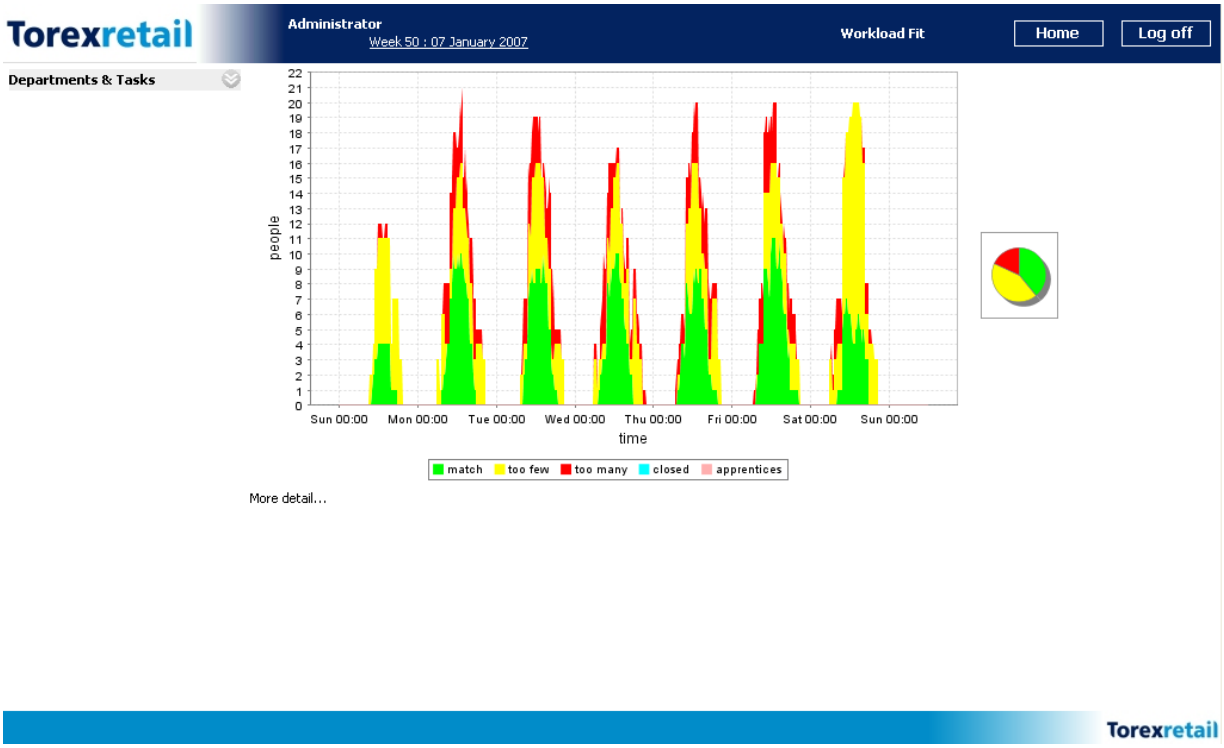
Shift Editor window

3. By default, this screen compares an employee's Scheduled hours to their Contracted hours.
4. 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.
5. For further information on using this screen, see page 229

Workload Fit

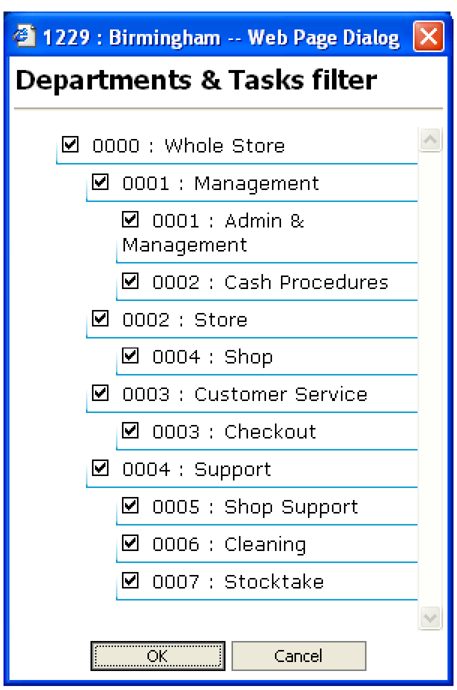
1. To display a Workload Fit graph, click 

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



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:

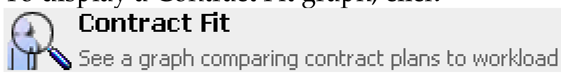


Departments & Tasks Filter window

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.

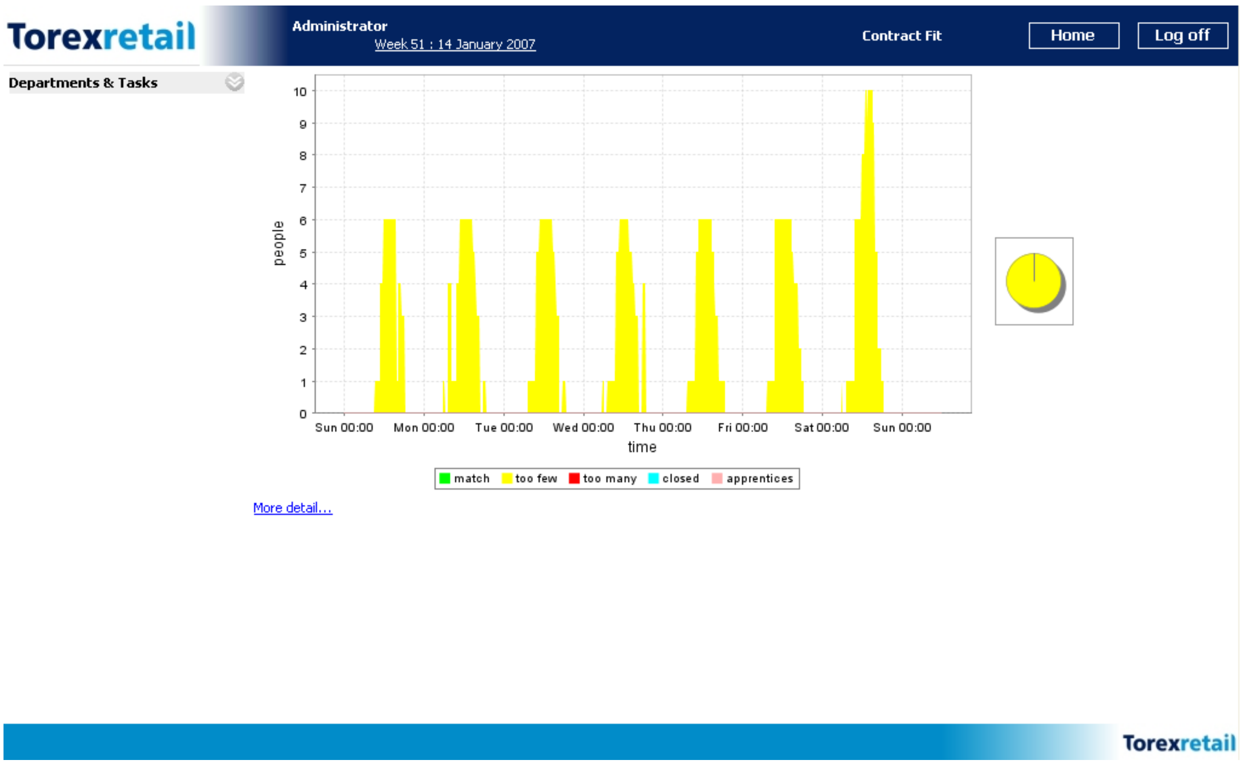
Contract Fit

1. To display a Contract Fit graph, click



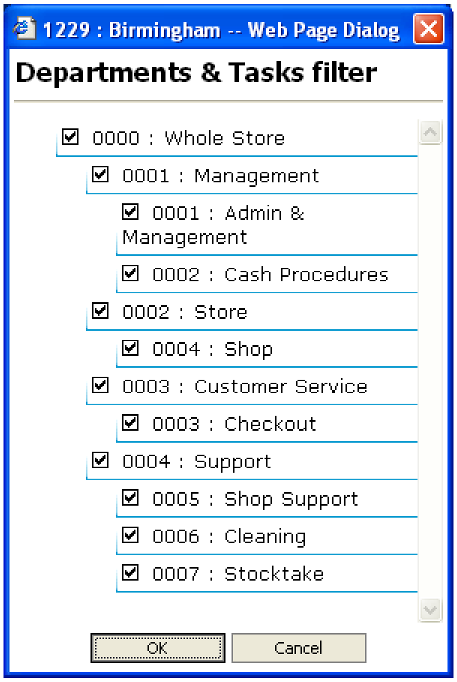
.

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:



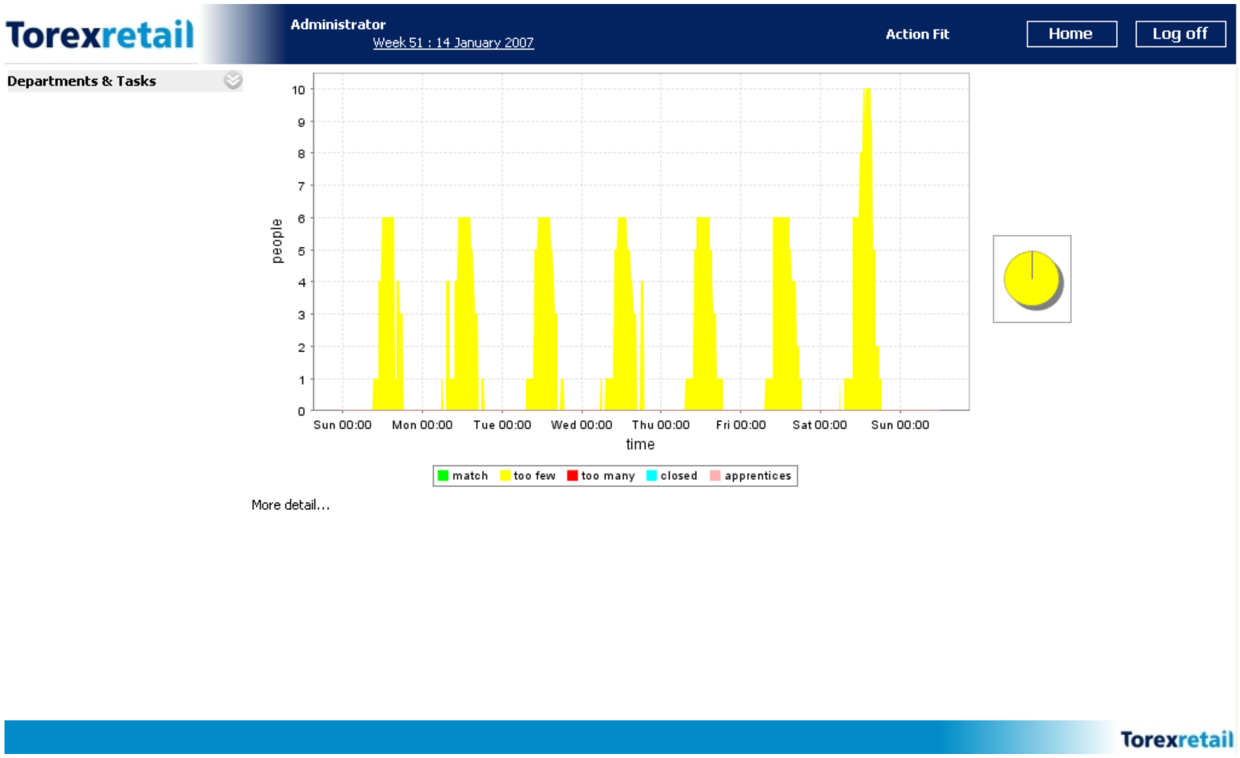
Departments & Tasks Filter window

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

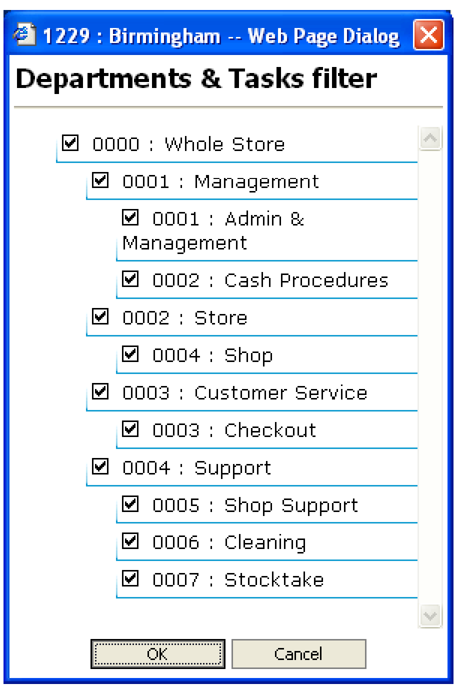
1. To display an Action Fit graph, click 

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



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:

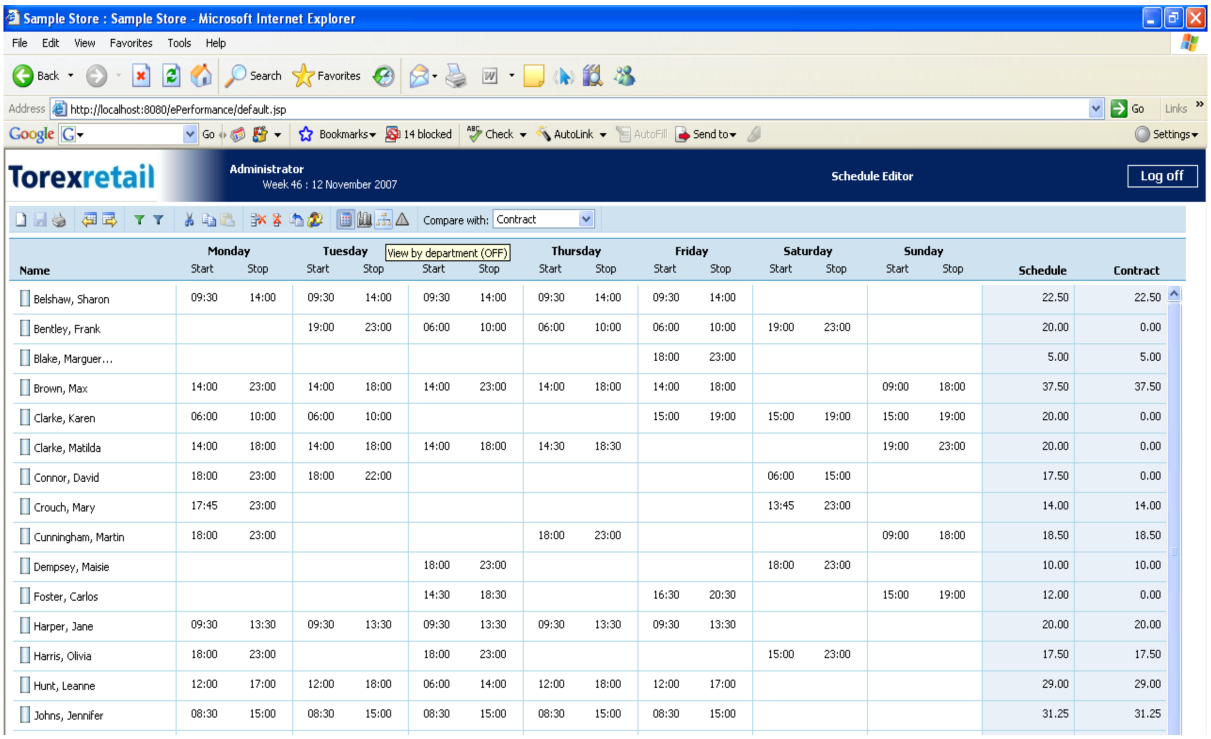


Departments & Tasks Filter window

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.

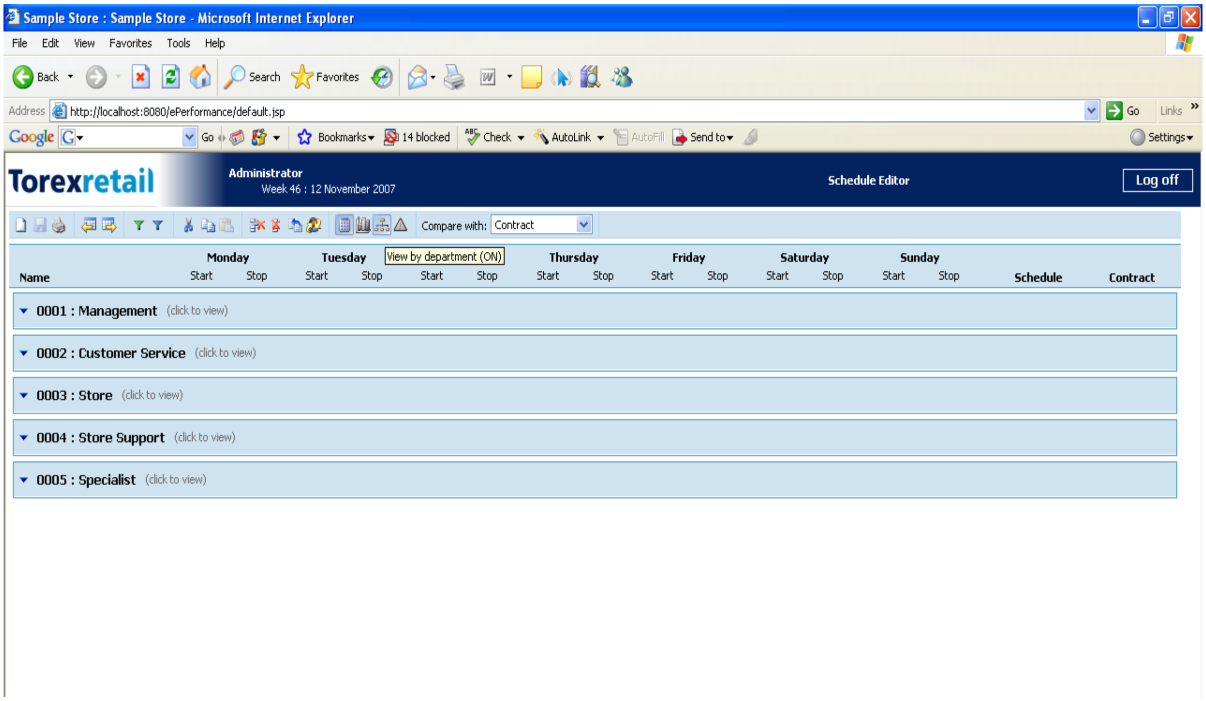
Simplified Plan Editor (New Schedule /Shift Editor)

Select the  toggle button to view the Plan Editor either by Department or by Employees (in alphabetical order)



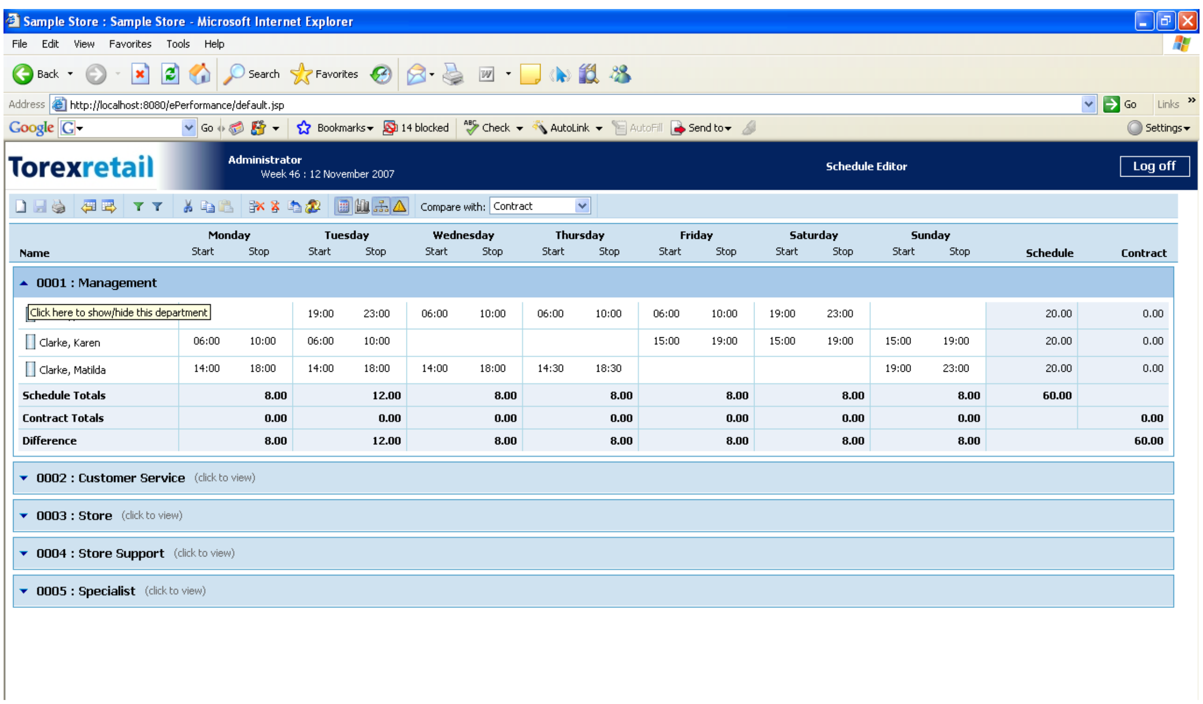
Simplified Plan Editor window

This view is by employee – the 'View by Department' toggle button is off



View by Employee window

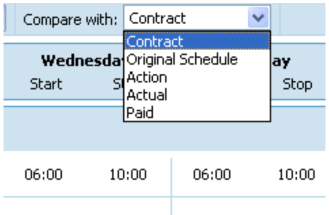
This view is by Department – the 'View by Department' toggle button is on



View by Department window

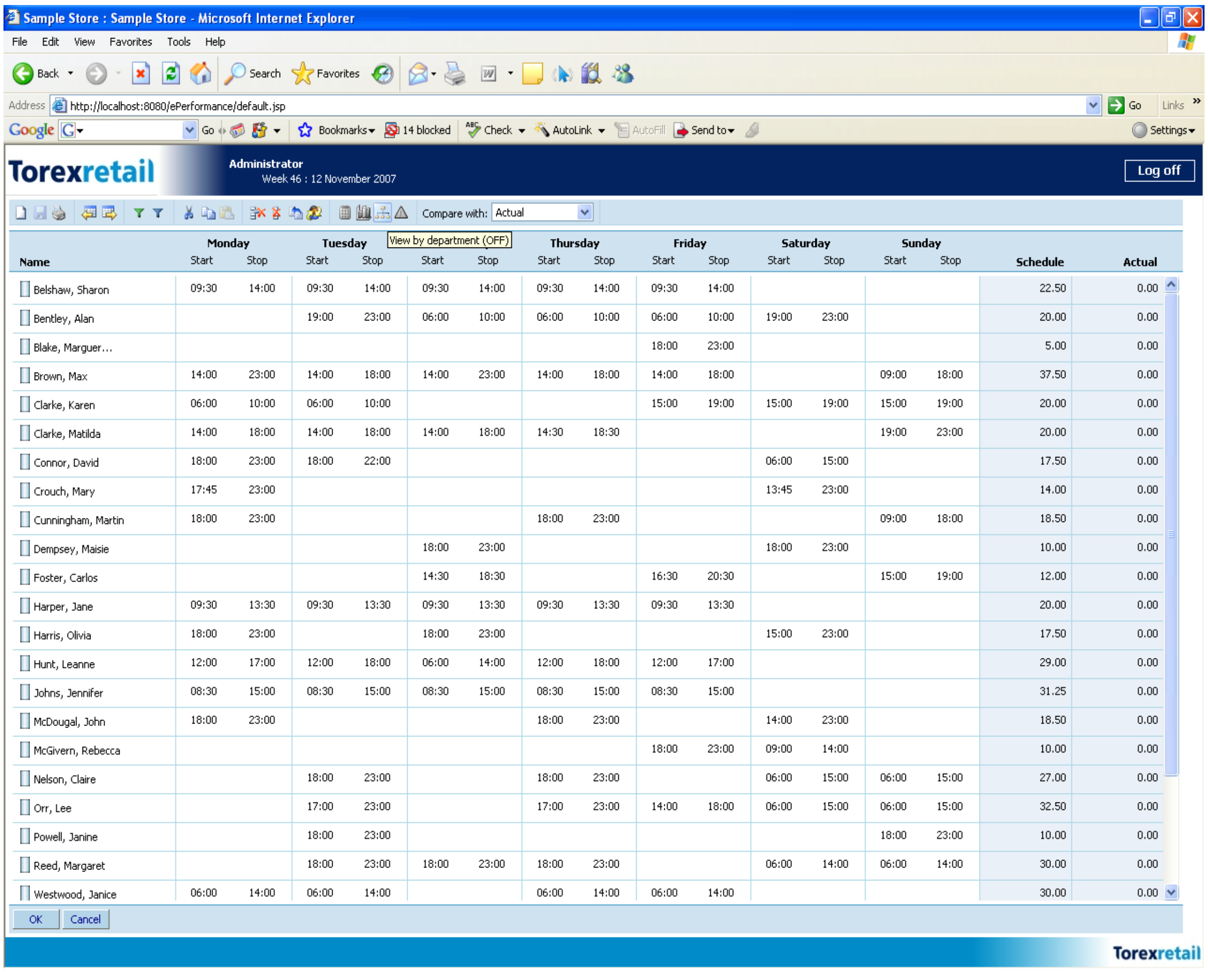
Compare with Actuals

To Compare the information with the actuals, click dropdown tab to ‘Actual’:



Actual window

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



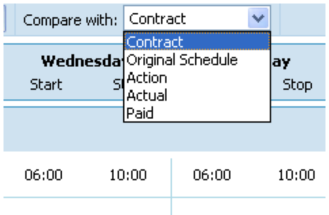
Name	Monday Start	Monday Stop	Tuesday Start	Tuesday Stop	Start	Stop	Thursday Start	Thursday Stop	Friday Start	Friday Stop	Saturday Start	Saturday Stop	Sunday Start	Sunday Stop	Schedule	Actual
Belshaw, Sharon	09:30	14:00	09:30	14:00	09:30	14:00	09:30	14:00	09:30	14:00					22.50	0.00
Bentley, Alan			19:00	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.

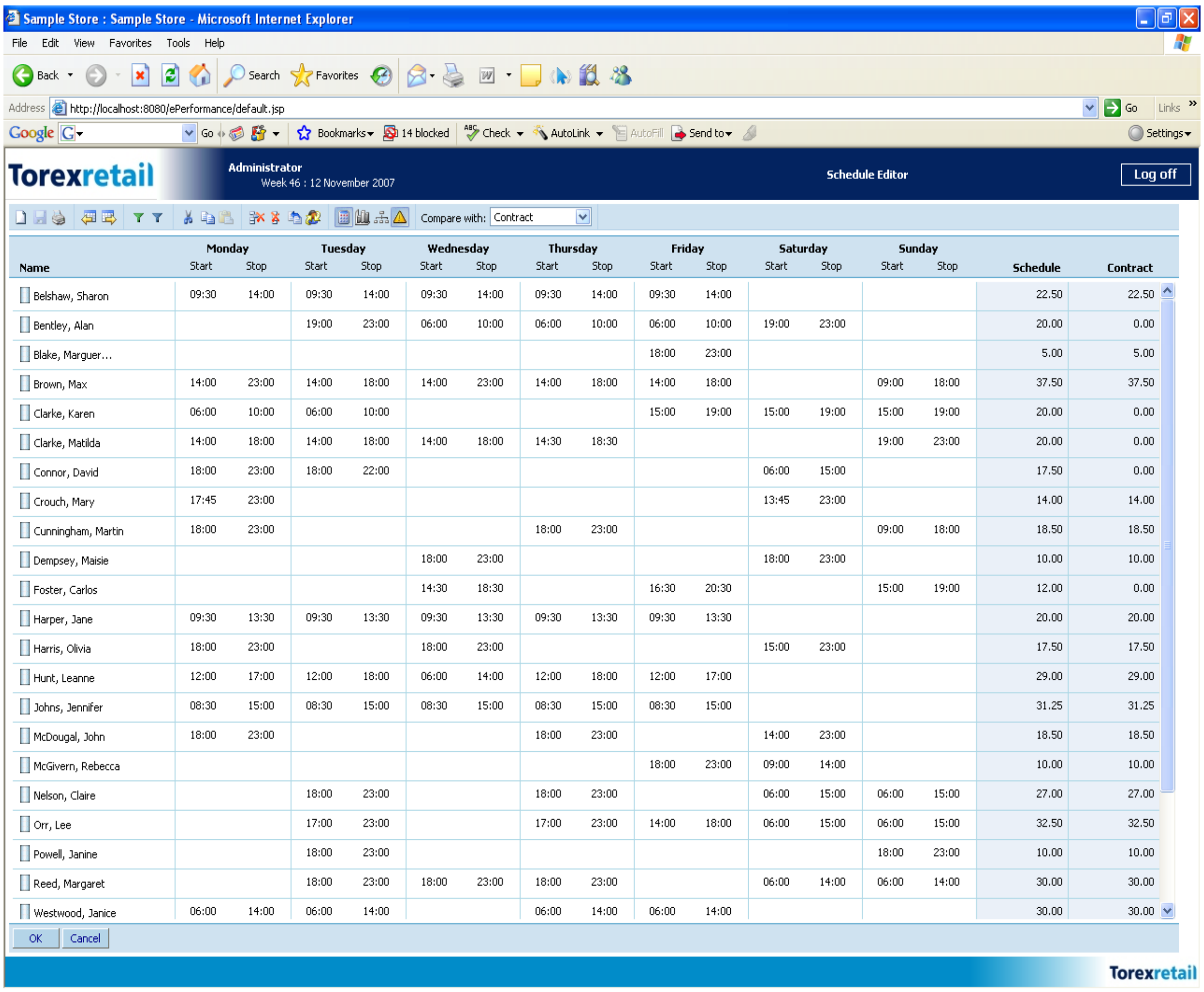
Compare with Contract

To edit an employee plan and compare it with their contracted hours, click drop down tab and select ‘Contract.’



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, 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
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

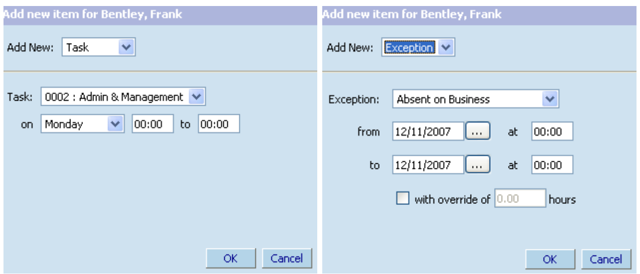
This option allows you to edit the Plan Editor and compare it with an employee's paid hours

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

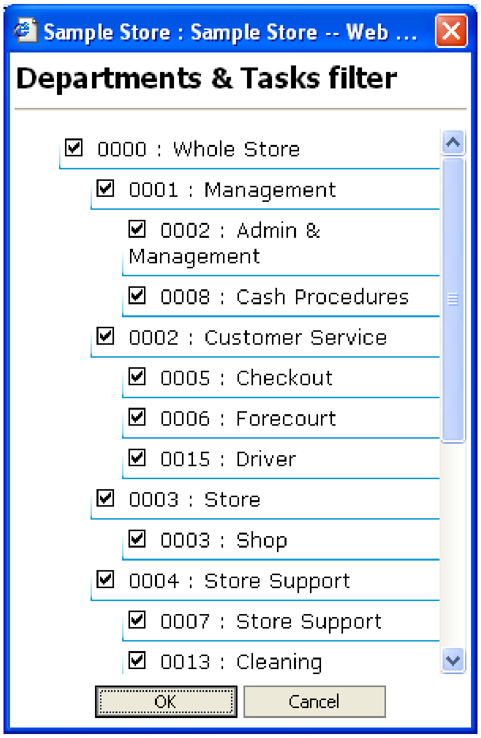
 - Print the Simplified Plan Editor

View Last Week's/Next Week's Plans / Schedules

 - These buttons allow the user to view last weeks and next week's Plans/Schedules.

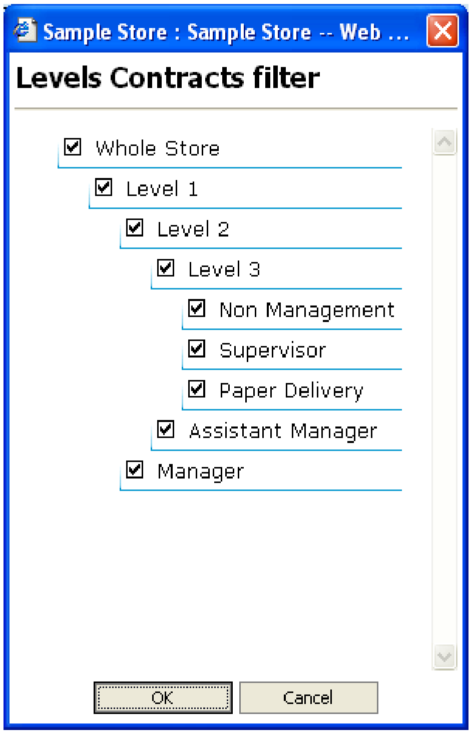
Filters

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

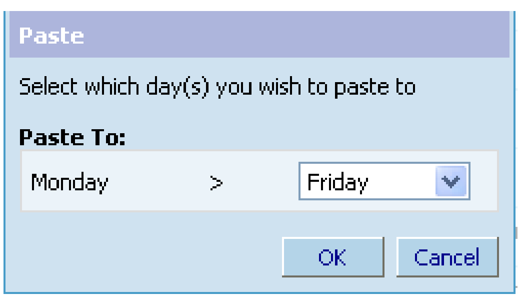
Cut, Copy, Paste

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 

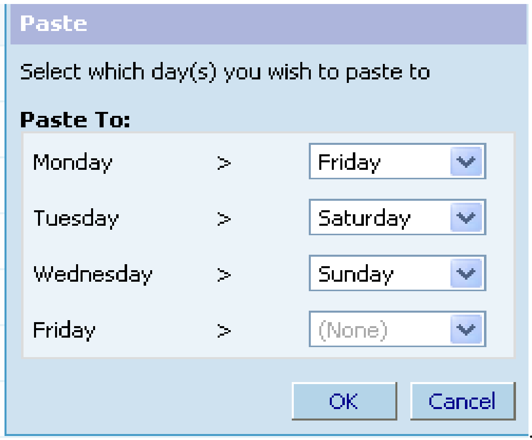
Then choose the day/s you wish the shift to be pasted to, and select the 

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.

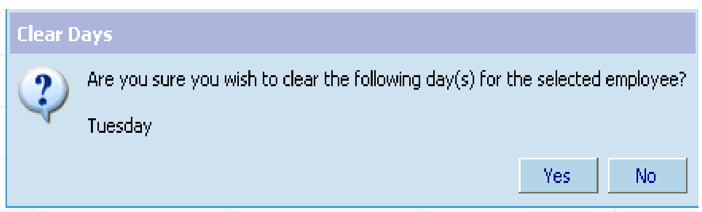


Paste Days window

To change the 'Paste to' days, click drop down tabs.

Clear an Employee's Shifts on a Particular Day/Days

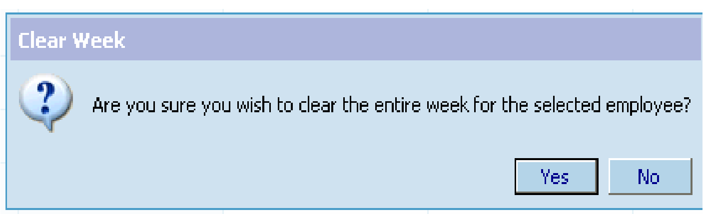
Click on an employee's name and on a selected day/s then click  to clear the day/s. This will bring up a dialogue box asking you to confirm that you wish to clear the selected days;



Clear Days window

Clear an Employee's Entire Weeks Shifts

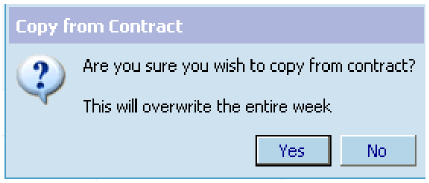
Click on an employee's name and then click  to clear all shifts in the week. This will bring up a dialogue box asking you to confirm that you wish to clear the entire week;



Clear Week window

Replace an employee's scheduled hours with their contracted hours

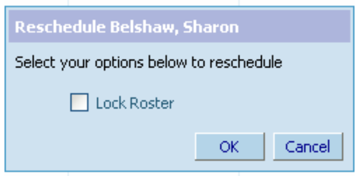
Click on employees name and then click . You will be asked to confirm that you wish to copy the weeks contracted hours and advised that this will overwrite the employees existing schedule



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

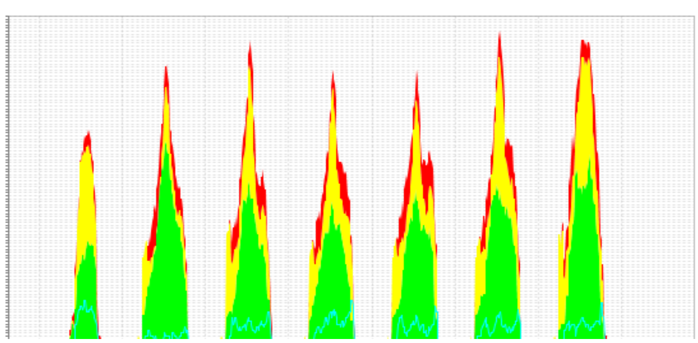
 When selected, the system automatically adds in relevant breaks. When deselected, the user can manually add breaks.

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;

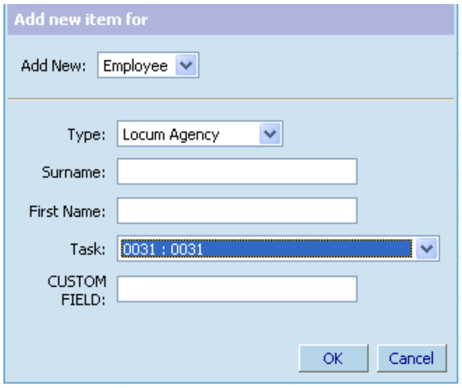


Workload Fit Graph window

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.

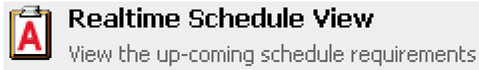
Department Schedule Report

See page 248 for further information on the Department Schedule Report.

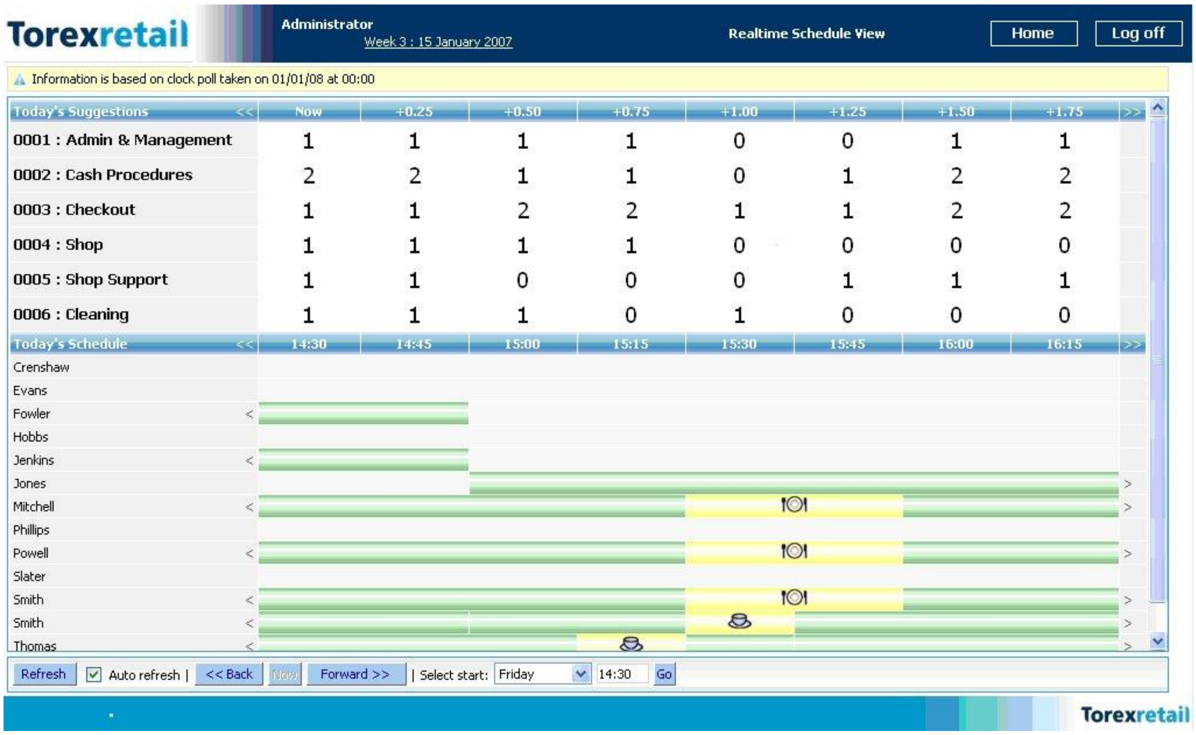
Target Staffing Report

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).

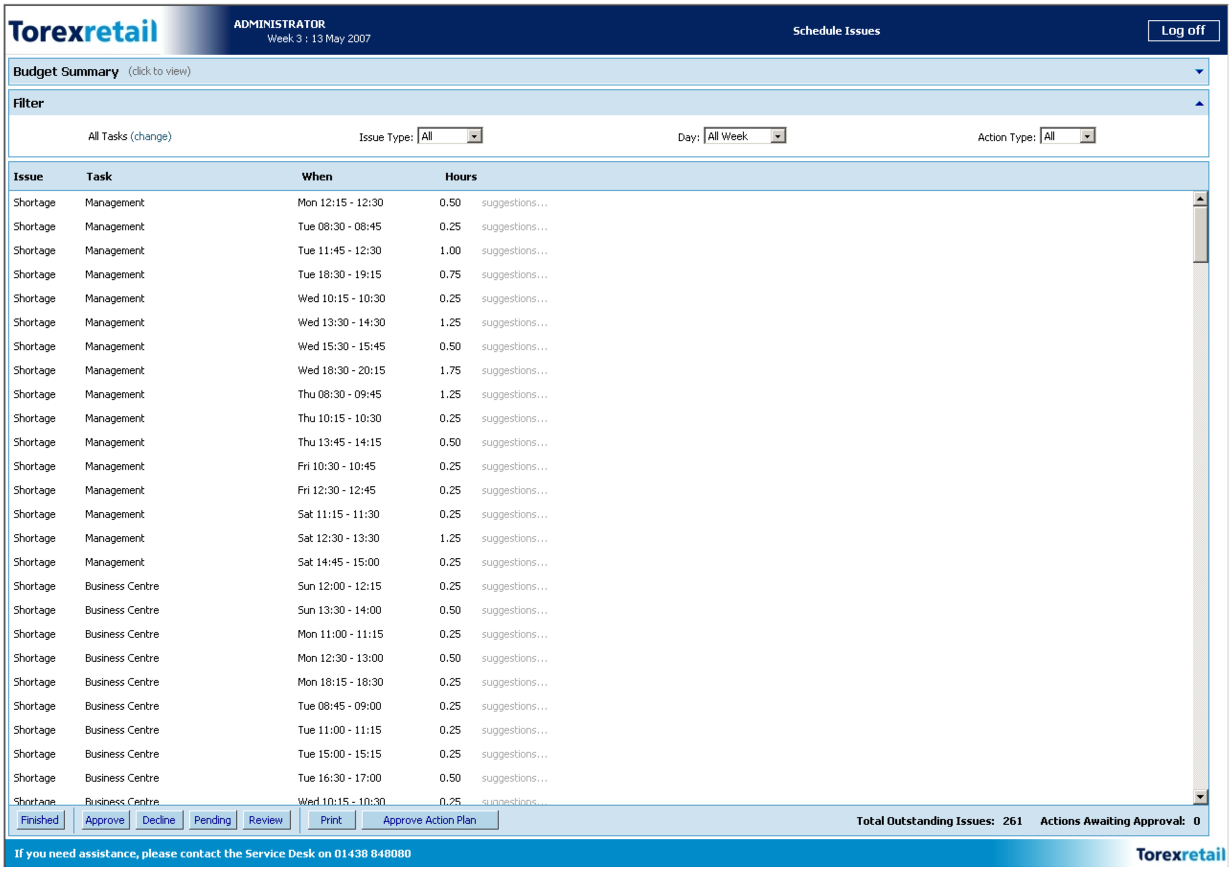
Using these priorities, it is also possible to configure the module so that when the scheduler is run, staff will not be allocated to a task where the workload requirement has already been met, thereby preventing overages appearing against real tasks. Here, an 'unscheduled task' is allocated to employees 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:



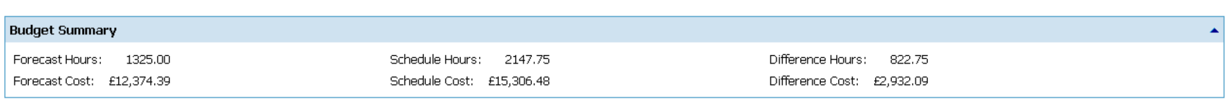
Budget Summary window

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 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 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.

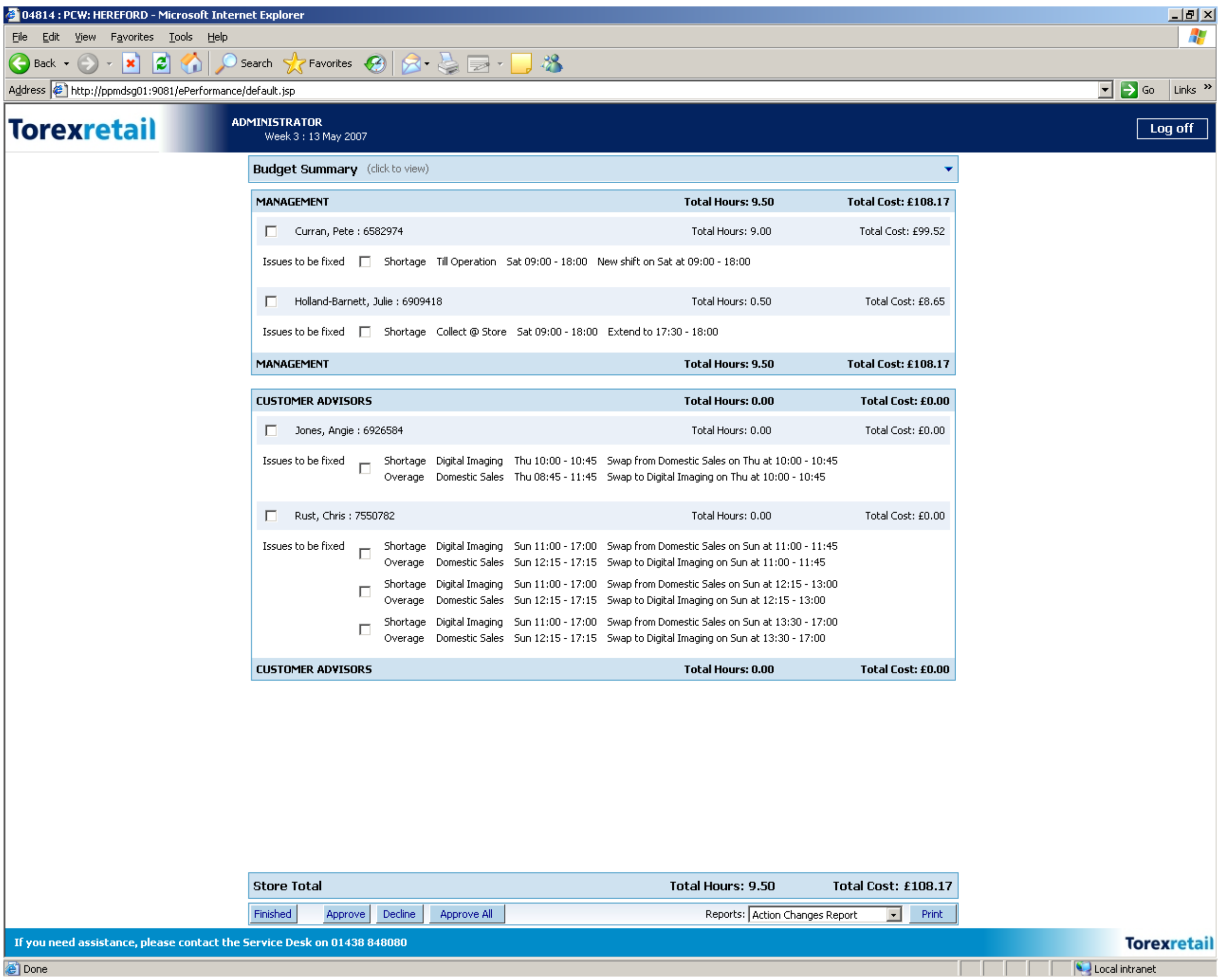
6. You can highlight any suggestion that meets your needs by clicking on it. The radio button to the left of the employee's name will become filled.
7. You now have a choice of doing one of the following to the suggestion you have selected:

- 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:



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.

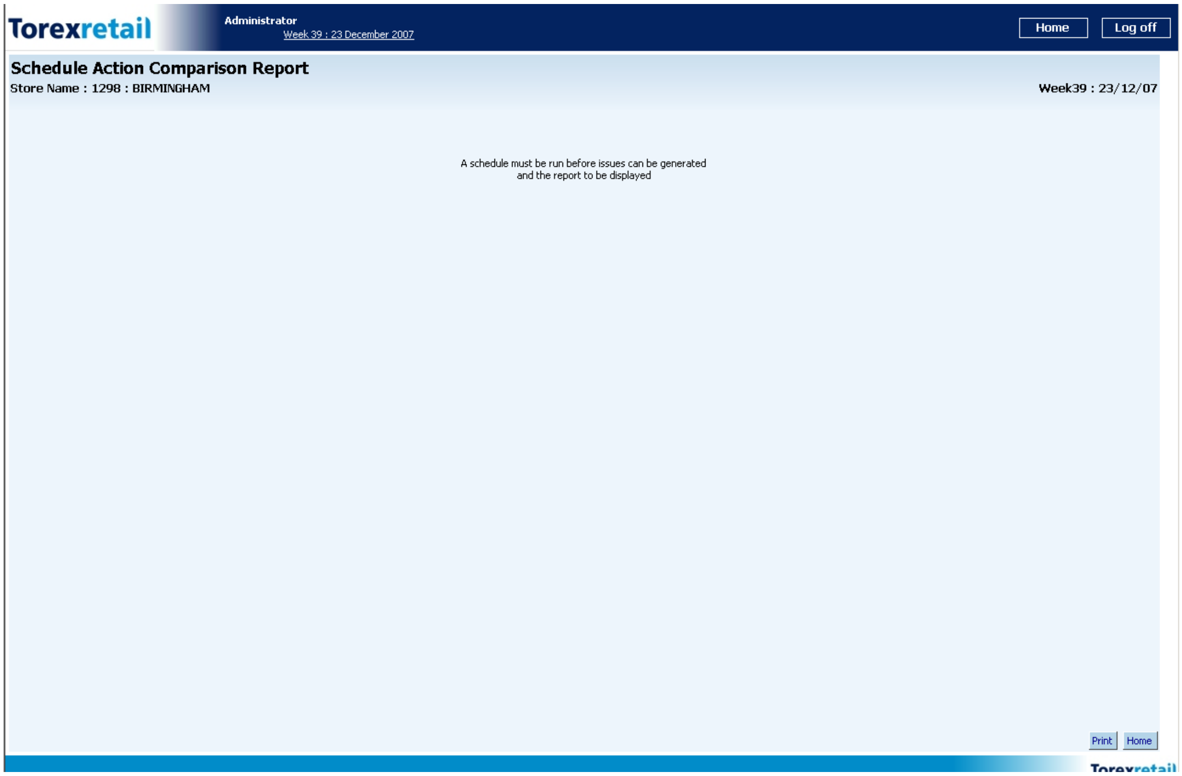
Once you have completely finished with the module, click **Finish** to leave the module.

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.

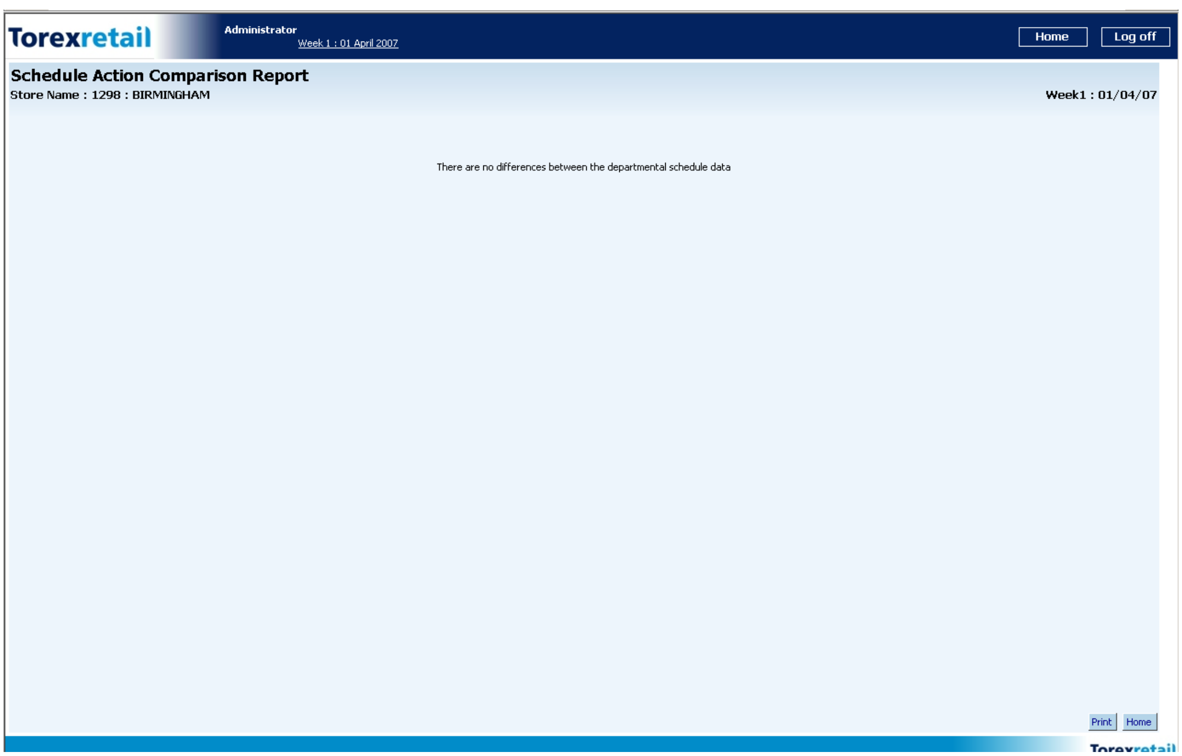
1. To view the Schedule Action Comparison Report, click 

.
2. If a schedule has not yet been run for the current week a screen, similar to that below, will be displayed:



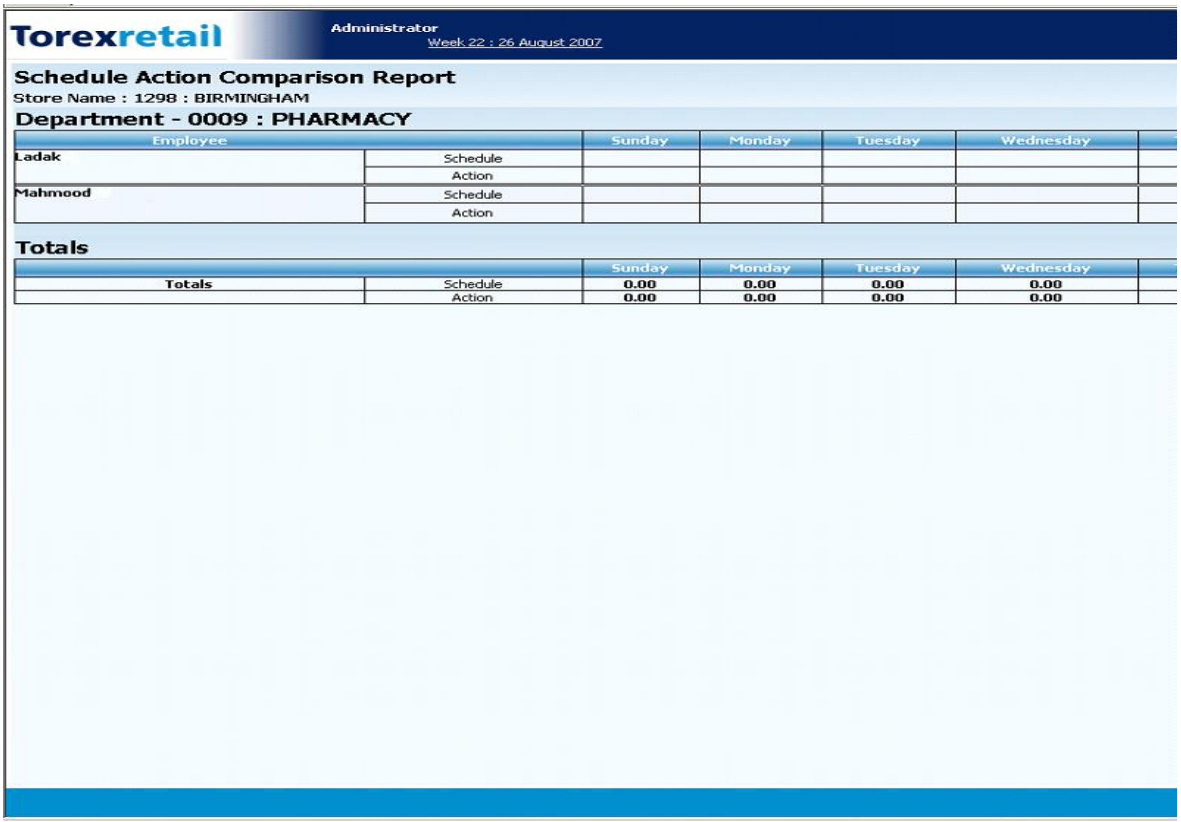
Schedule Action comparison Report window

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:



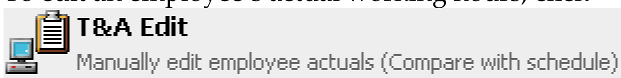
Report window

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.

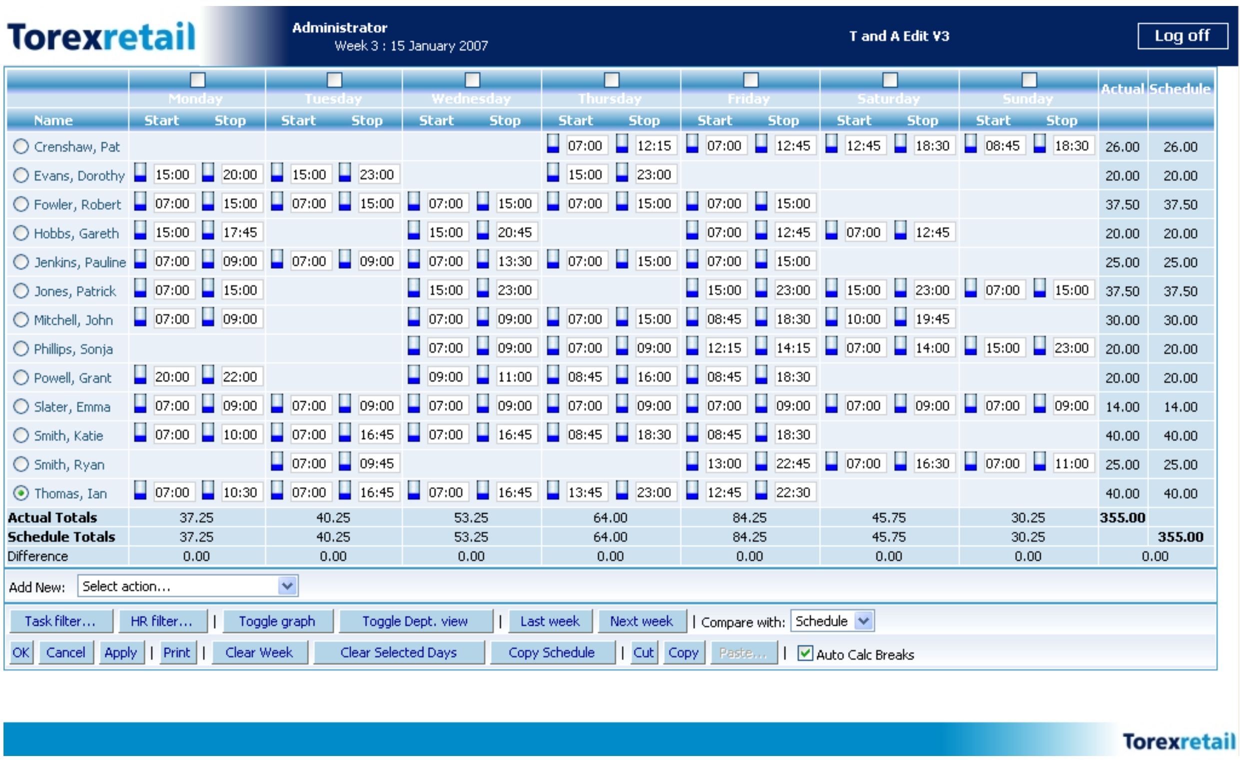
Print

1. Clicking **Print**, will open a standard print dialog box.
2. Select the relevant printer and click **OK**.
3. The report will be printed.

T&A Edit

1. To edit an employee's actual working hours, click  .

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



	Monday		Tuesday		Wednesday		Thursday		Friday		Saturday		Sunday		Actual	Schedule
Name	Start	Stop	Start	Stop	Start	Stop	Start	Stop	Start	Stop	Start	Stop	Start	Stop		
Crenshaw, Pat							07:00	12:15	07:00	12:45	12:45	18:30	08:45	18:30	26.00	26.00
Evans, Dorothy	15:00	20:00	15:00	23:00			15:00	23:00							20.00	20.00
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
Hobbs, Gareth	15:00	17:45			15:00	20:45			07:00	12:45	07:00	12:45			20.00	20.00
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
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
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
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
Powell, Grant	20:00	22:00			09:00	11:00	08:45	16:00	08:45	18:30					20.00	20.00
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
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
Smith, Ryan			07:00	09:45					13:00	22:45	07:00	16:30	07:00	11:00	25.00	25.00
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
Actual Totals	37.25		40.25		53.25		64.00		84.25		45.75		30.25		**355.00**	
Schedule Totals	37.25		40.25		53.25		64.00		84.25		45.75		30.25			**355.00**
Difference	0.00		0.00		0.00		0.00		0.00		0.00		0.00		0.00	

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…

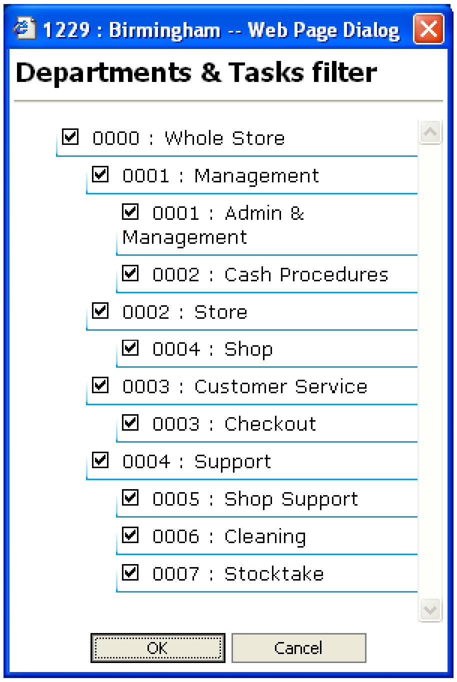
At the bottom of the screen is an **Add New** drop down menu. This enables you to add a new task or exception for example, Holiday, to an individual.

Add New 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:

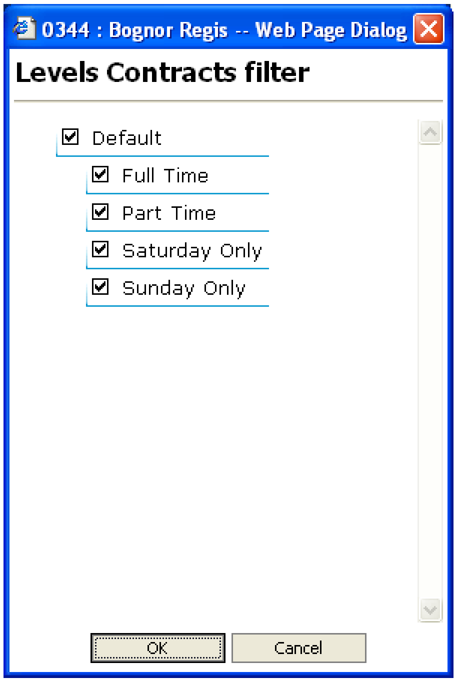


Departments & Tasks Filter window

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:

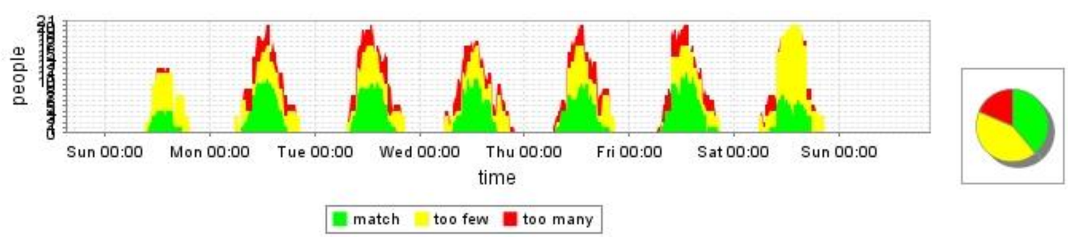


Levels Contracts Filter window

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

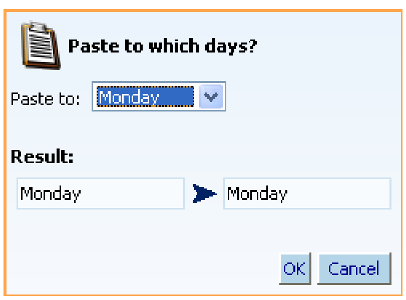
1. This button changes, depending on which column you are currently using with the **Compare With** option (See Page 232 for further information).
2. Clicking on this button, after selecting an employee, will copy those hours and apply them to the employee for example, If **Contracted** was selected 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.

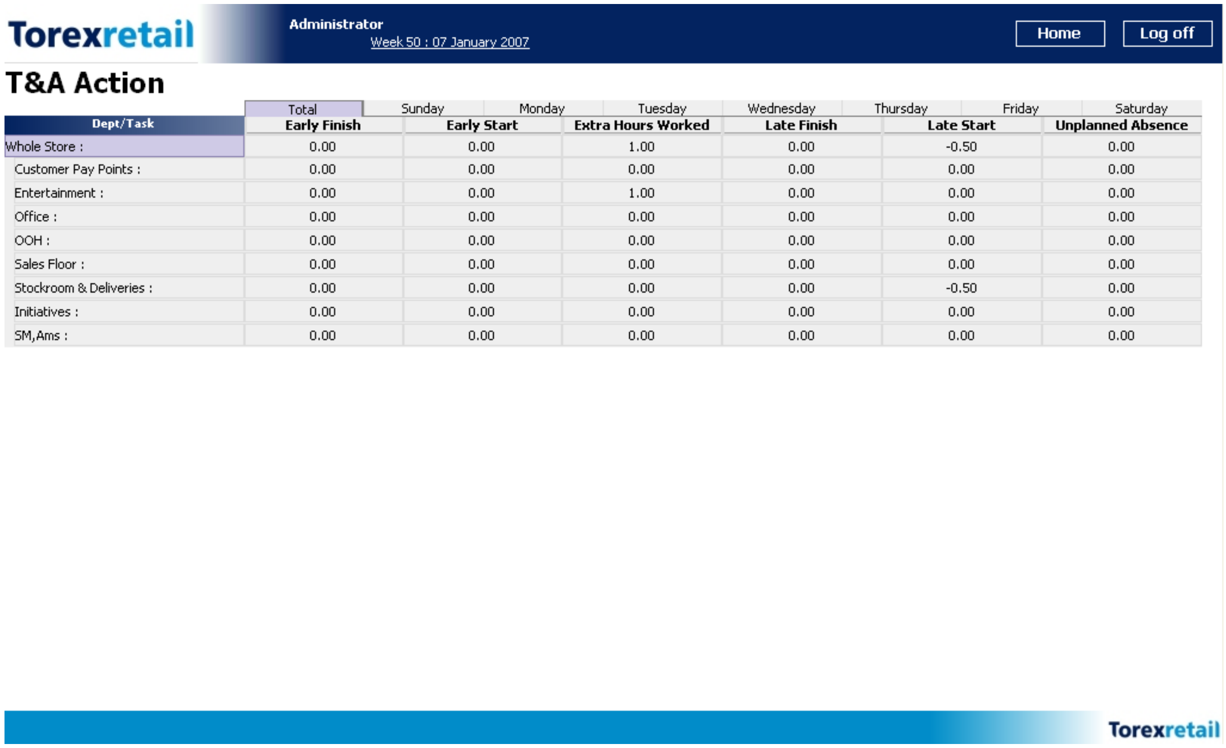
Auto Calc Breaks

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 .

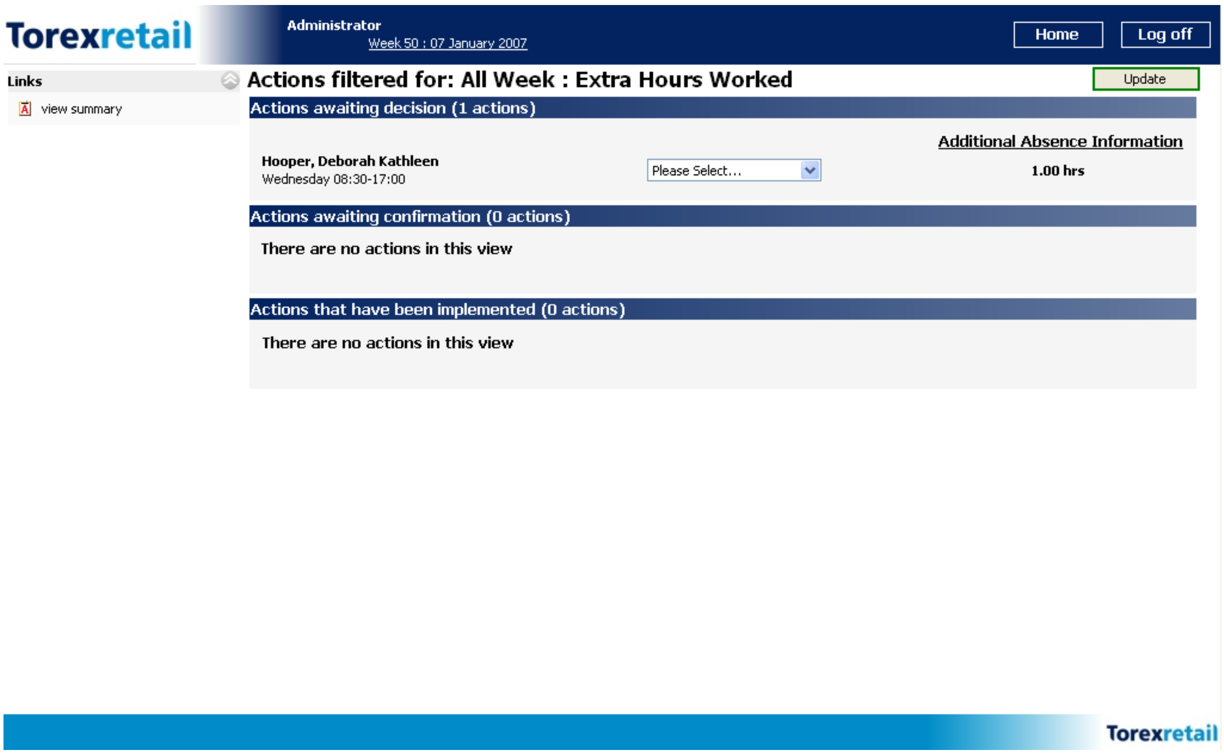
2. This will display a screen, similar to the one below:



Dept/Task	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

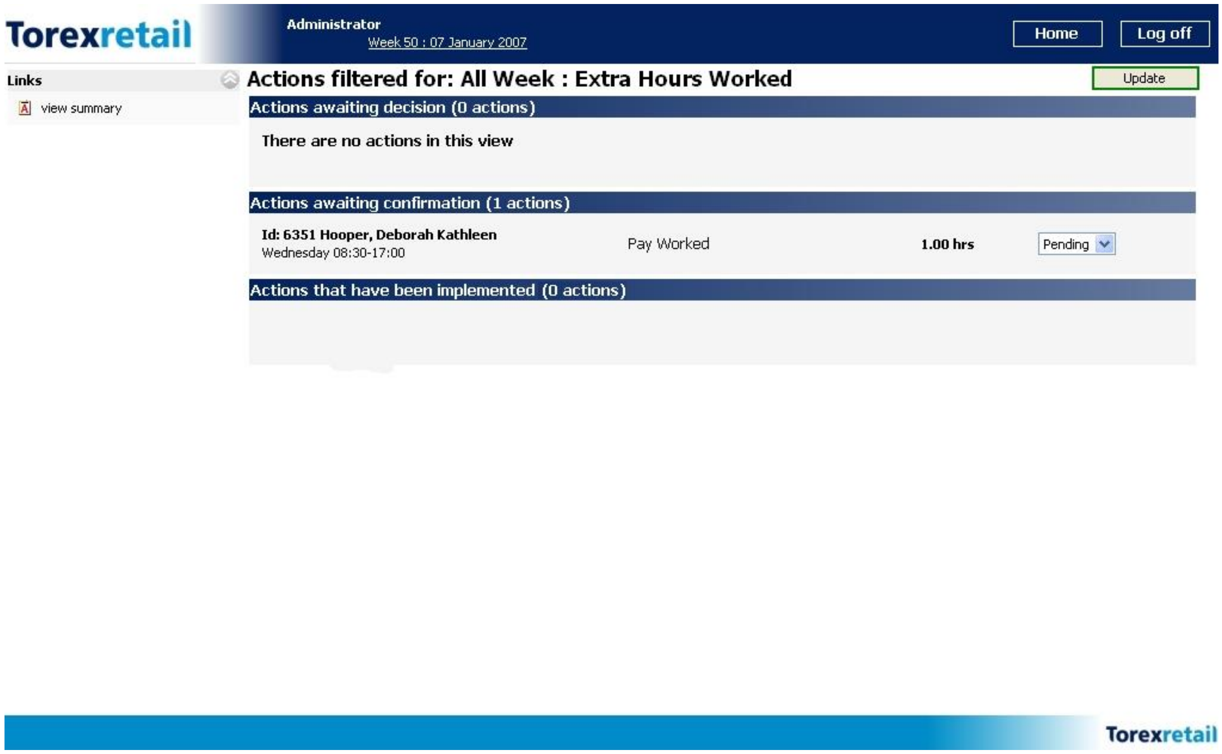
T&A Action window

3. 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.
4. Clicking **1.00** extra hours will alter the view to show a further breakdown of the discrepancies.
5. Clicking second **1.00** will display a screen, similar to that below:



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.

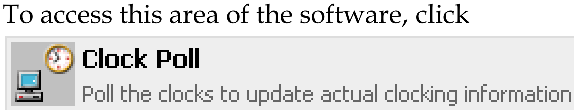


Actions Filtered window

9. When the correct choices have been made, click **Update** at the top of the screen.
10. 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.
11. Repeat the process above for each of the discrepancies.
12. Once all of the times have been set to **0**, then all of the discrepancies have been accounted for.

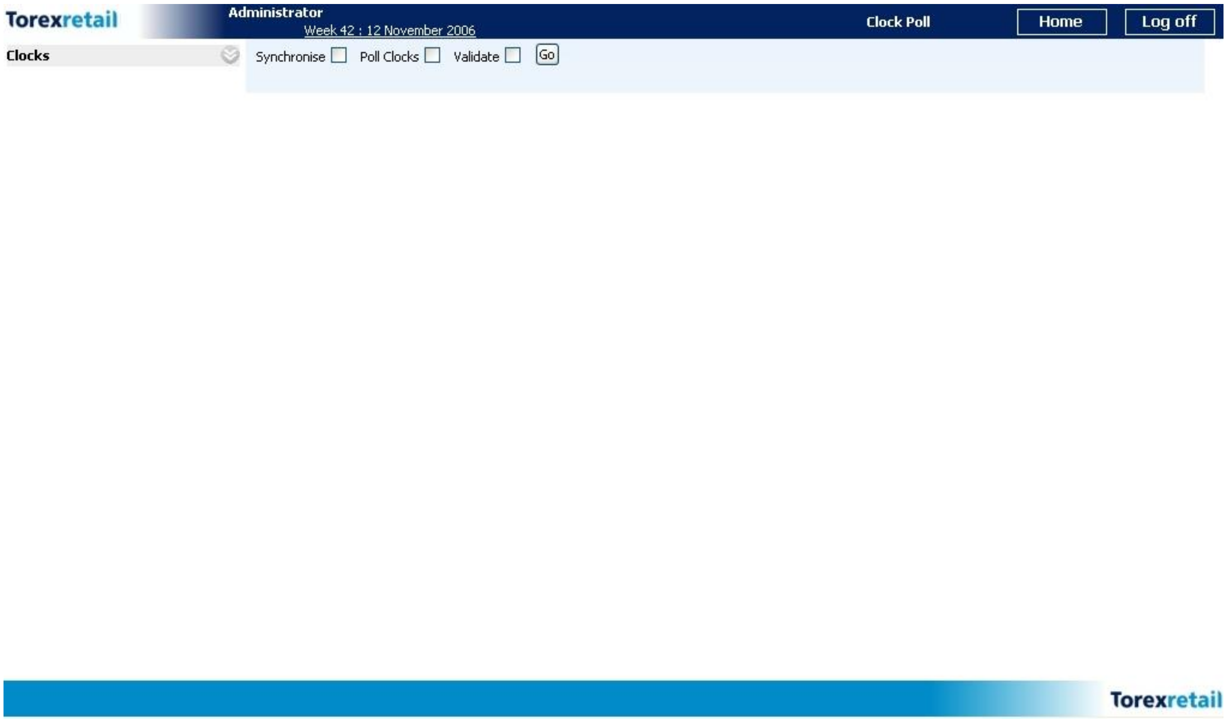
Clock Poll

1. To access this area of the software, click



.

2. 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

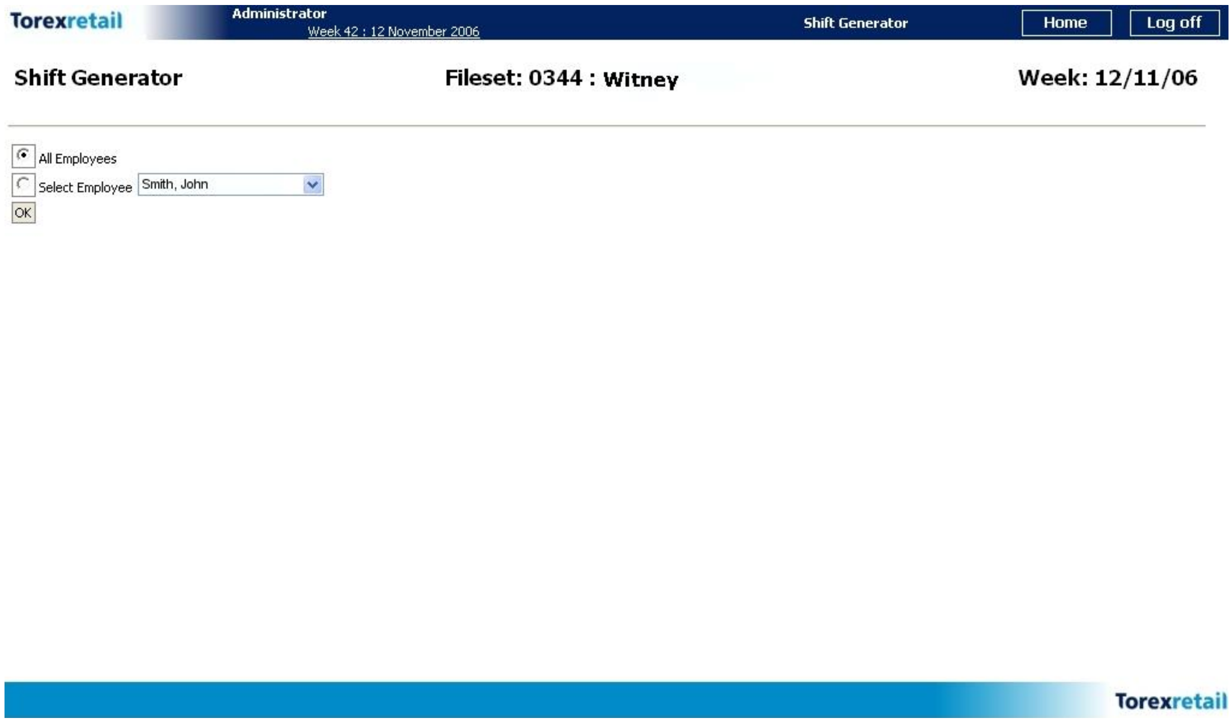
1. Ticking the **Validate** box will update the employee information in the clocks. It will add any new employee data and delete any employees who have left.

Shift Generator

1. To access the **Shift Generator**, click


.

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



Shift Generator window

3. Either leave the **All Employees** option selected or choose someone from the **Select Employee** list and then click **OK**.

9
Reports

1. To view the Reports module, click 

.

HR Reports

1. To view the HR Reports, click 

.

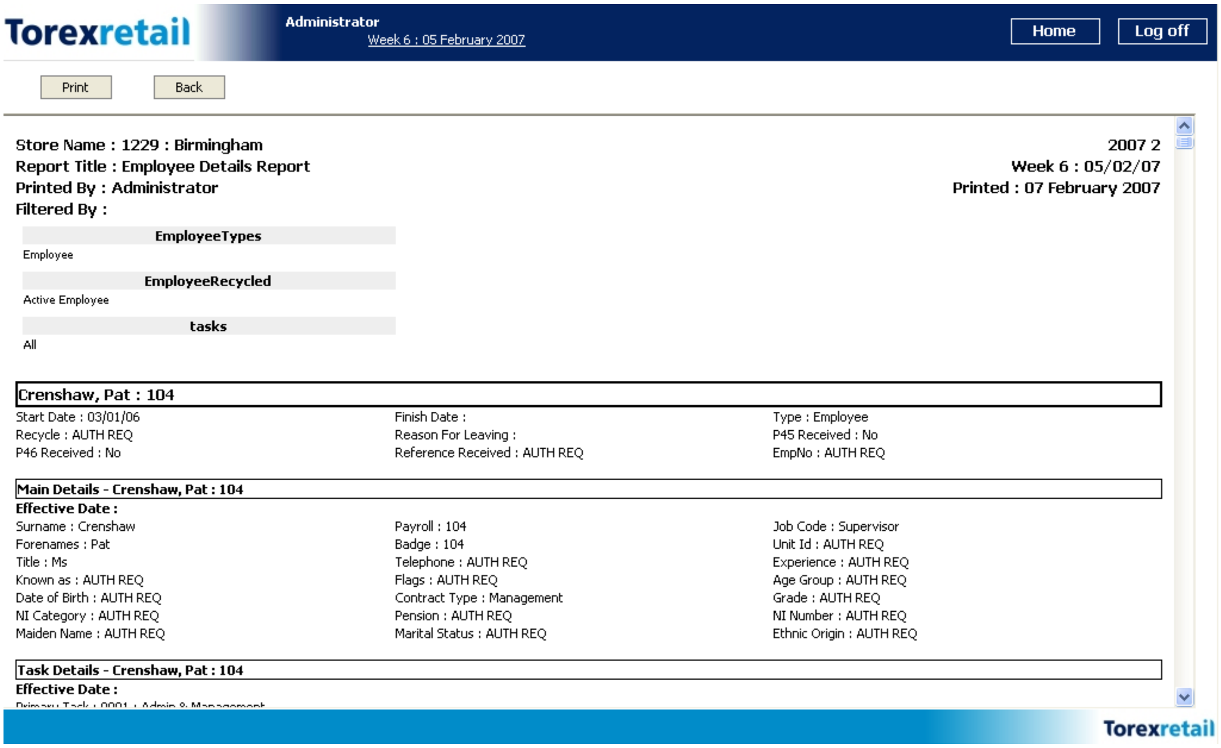
Employee Details Report

1. To view the Employee Details Report, click


.
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.

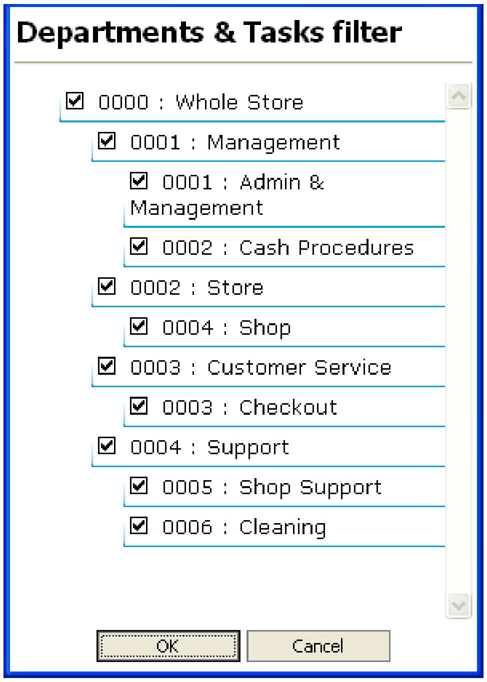


Report window

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:

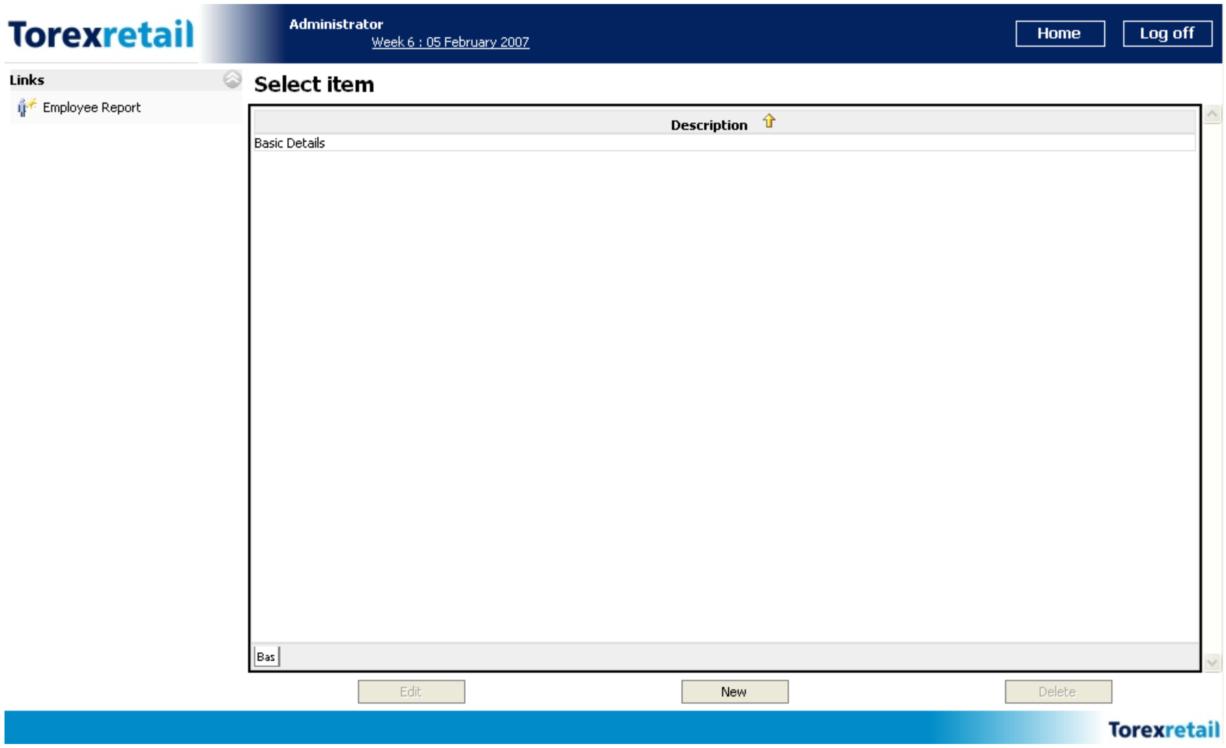


Departments & Tasks Filter window

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

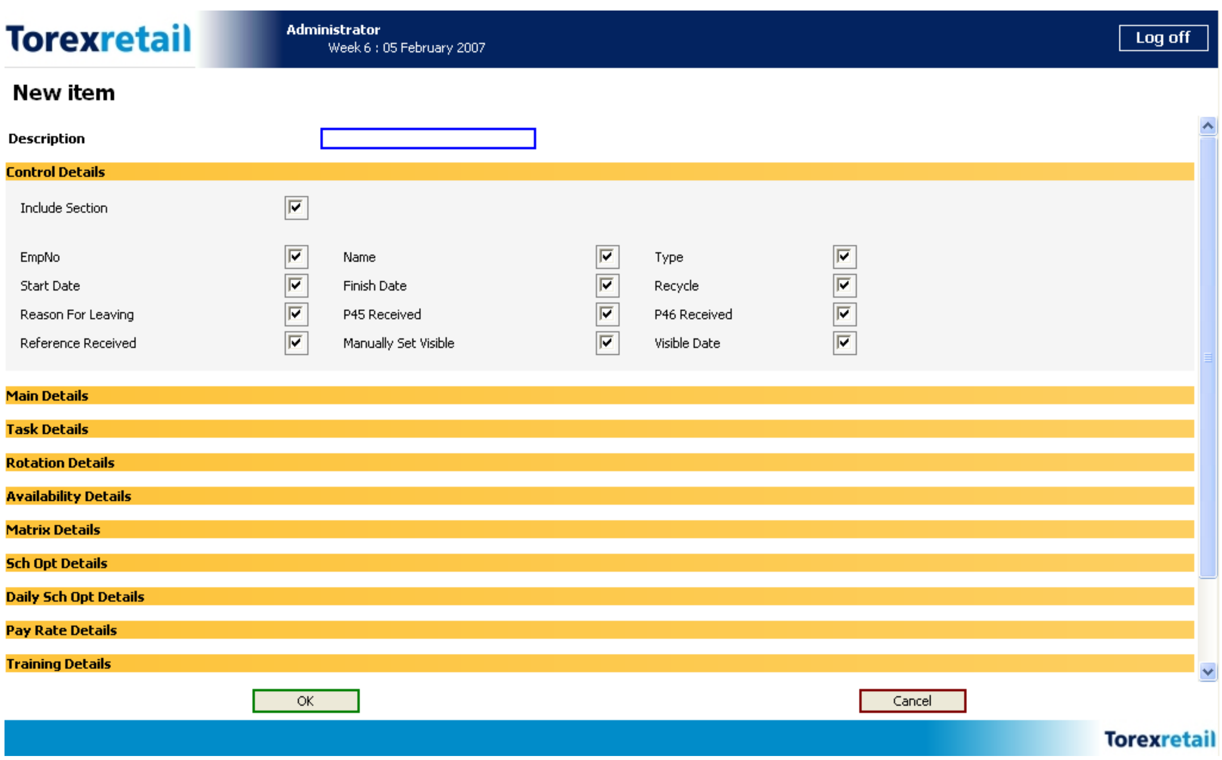
1. To setup a specified filter, for use with the report, click **Report Filter Setup** link on the left hand side of the screen.
2. A screen, similar to that below, will be displayed:



Select Item window

Create a New Report Filter

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



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

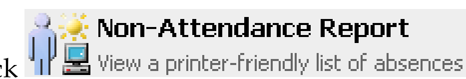
1. To edit a Report Filter, click on its name in the list and click **Edit**.
2. Make any relevant changes and click **OK** to save and confirm or **Cancel** to disregard.

Delete a Report Filter

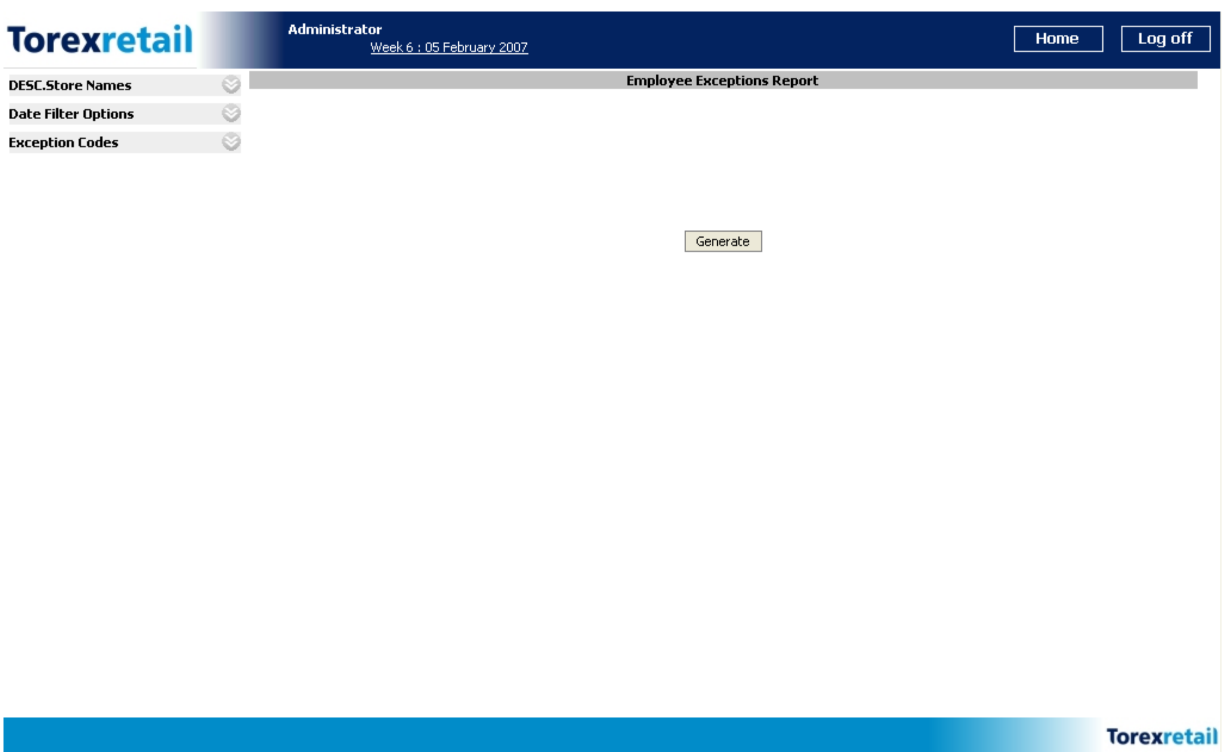
To delete a report filter, click on its name in the list and click **Delete**, at the bottom of the screen.

You will be asked **Are you sure you want to delete this item?** Click **Yes** to confirm or **Cancel** to disregard.

Non-Attendance Report

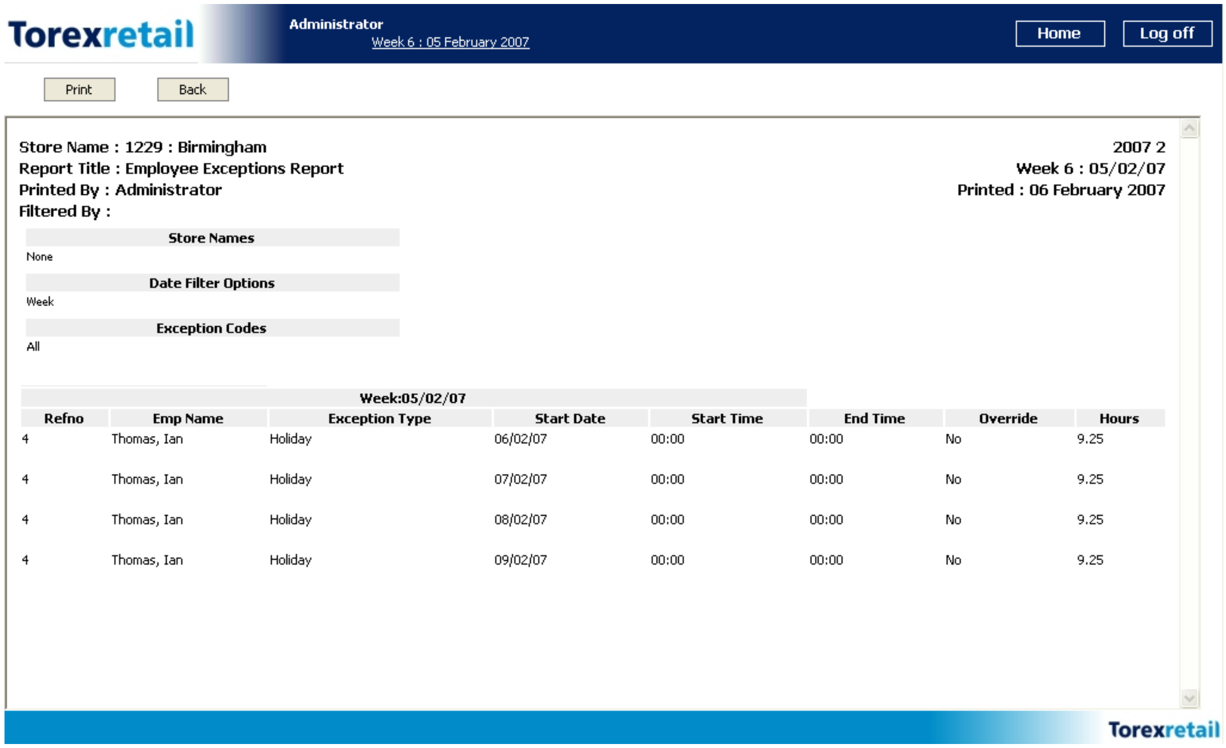
1. To view the Non-Attendance Report, click 

.
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.



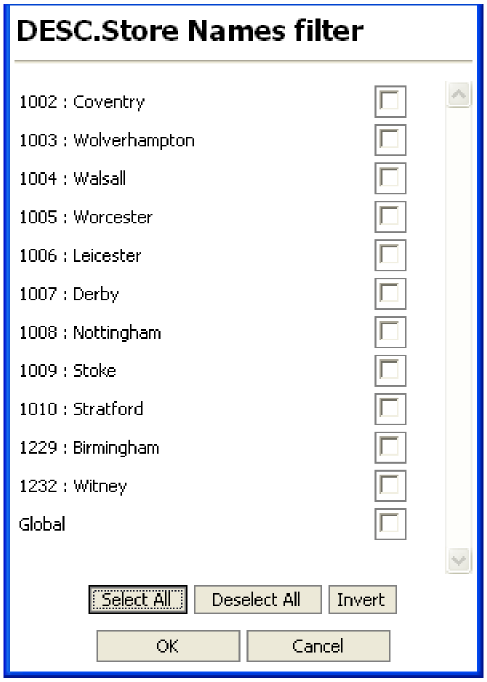
Refno	Emp Name	Exception Type	Start Date	Start Time	End Time	Override	Hours
4	Thomas, Ian	Holiday	06/02/07	00:00	00:00	No	9.25
4	Thomas, Ian	Holiday	07/02/07	00:00	00:00	No	9.25
4	Thomas, Ian	Holiday	08/02/07	00:00	00:00	No	9.25
4	Thomas, Ian	Holiday	09/02/07	00:00	00:00	No	9.25

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:



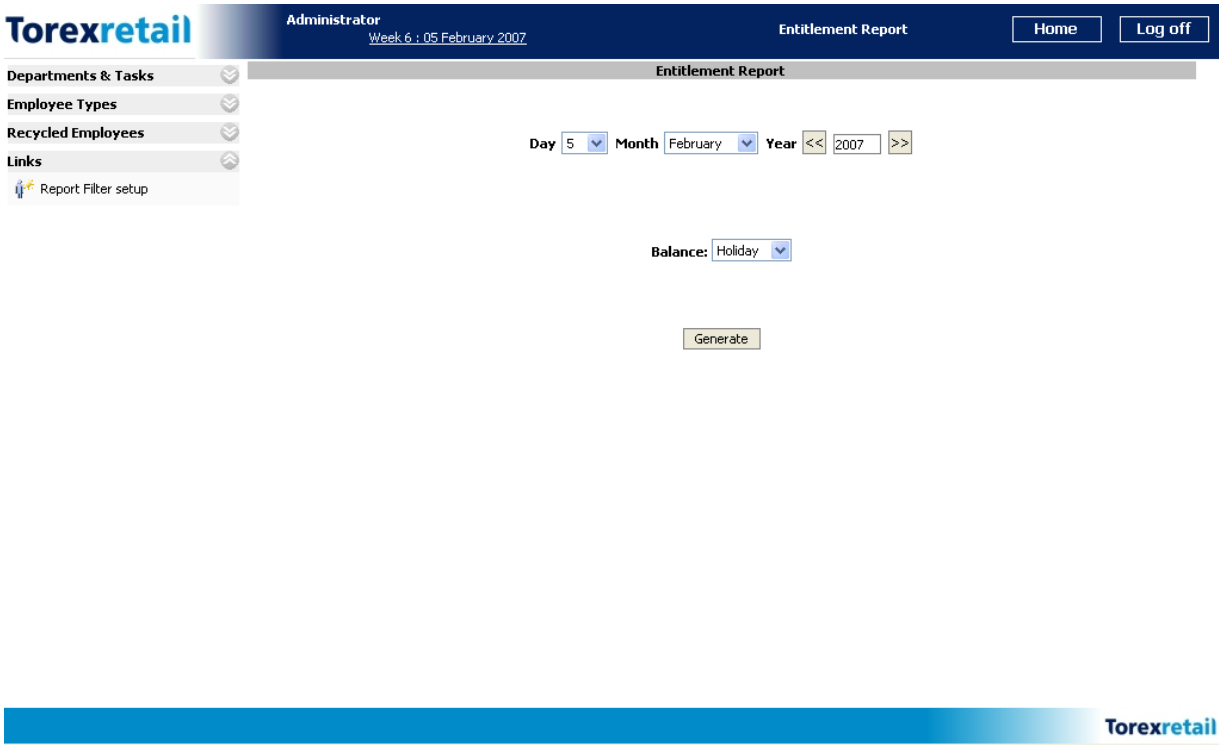
Store Names Filter window

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:

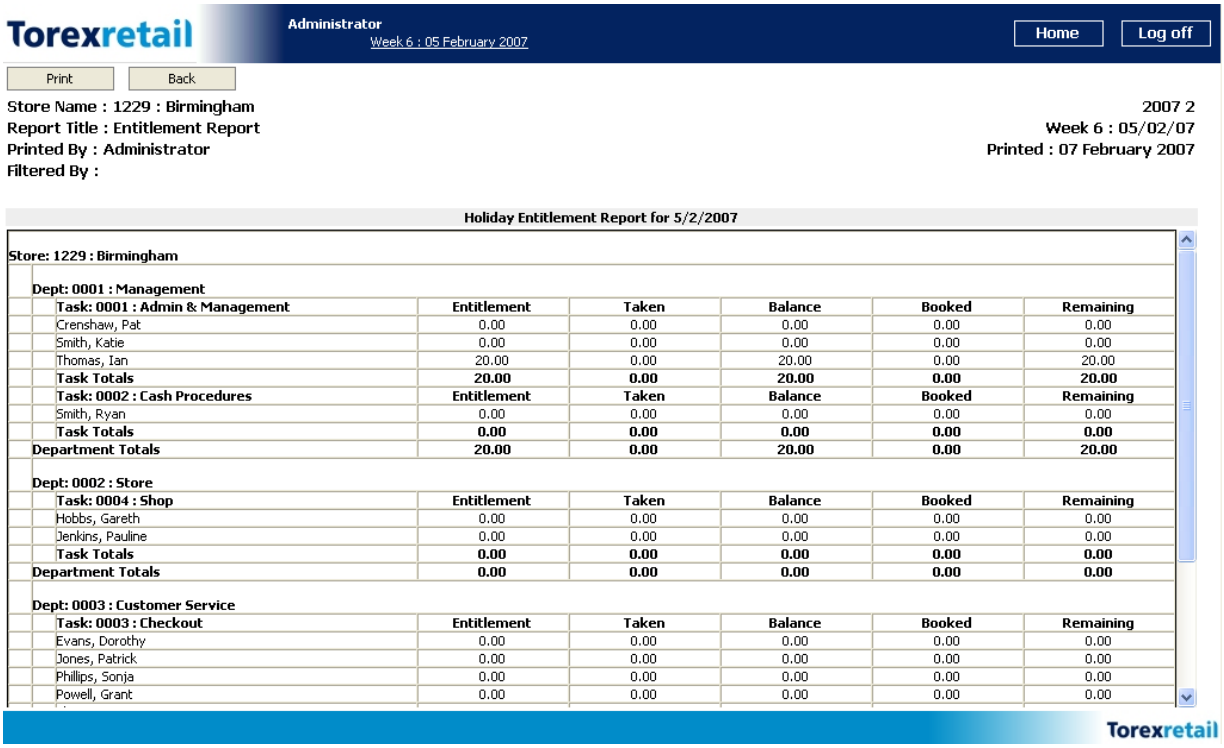


Entitlement Report window

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.


Torexretail
Administrator
Week 6 : 05 February 2007
Home
Log off
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

	Entitlement	Taken	Balance	Booked	Remaining
Dept: 0001 : Management					
Task: 0001 : Admin & Management	**Entitlement**	**Taken**	**Balance**	**Booked**	**Remaining**
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
Task Totals	**20.00**	**0.00**	**20.00**	**0.00**	**20.00**
Task: 0002 : Cash Procedures	**Entitlement**	**Taken**	**Balance**	**Booked**	**Remaining**
Smith, Ryan	0.00	0.00	0.00	0.00	0.00
Task Totals	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**
Department Totals	**20.00**	**0.00**	**20.00**	**0.00**	**20.00**
Dept: 0002 : Store					
Task: 0004 : Shop	**Entitlement**	**Taken**	**Balance**	**Booked**	**Remaining**
Hobbs, Gareth	0.00	0.00	0.00	0.00	0.00
Jenkins, Pauline	0.00	0.00	0.00	0.00	0.00
Task Totals	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**
Department Totals	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**
Dept: 0003 : Customer Service					
Task: 0003 : Checkout	**Entitlement**	**Taken**	**Balance**	**Booked**	**Remaining**
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

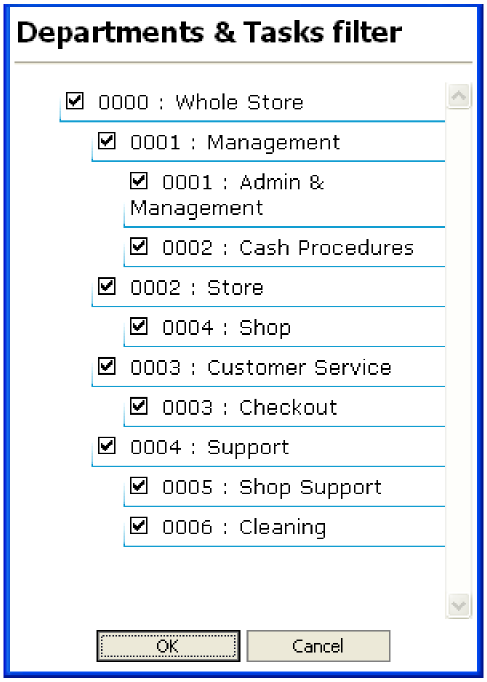
Torexretail

Report window

6. To print the report, click **Print**.
7. 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

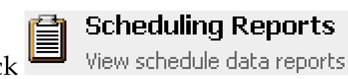
1. The report filters, in the top left hand corner of the screen, allow you to refine the information which is displayed in the report.
2. Clicking on one of the links will display a window, similar to the one below:



Departments & Tasks Filter 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 

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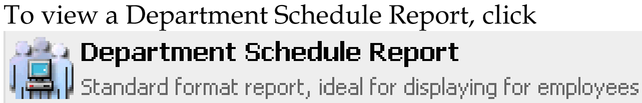
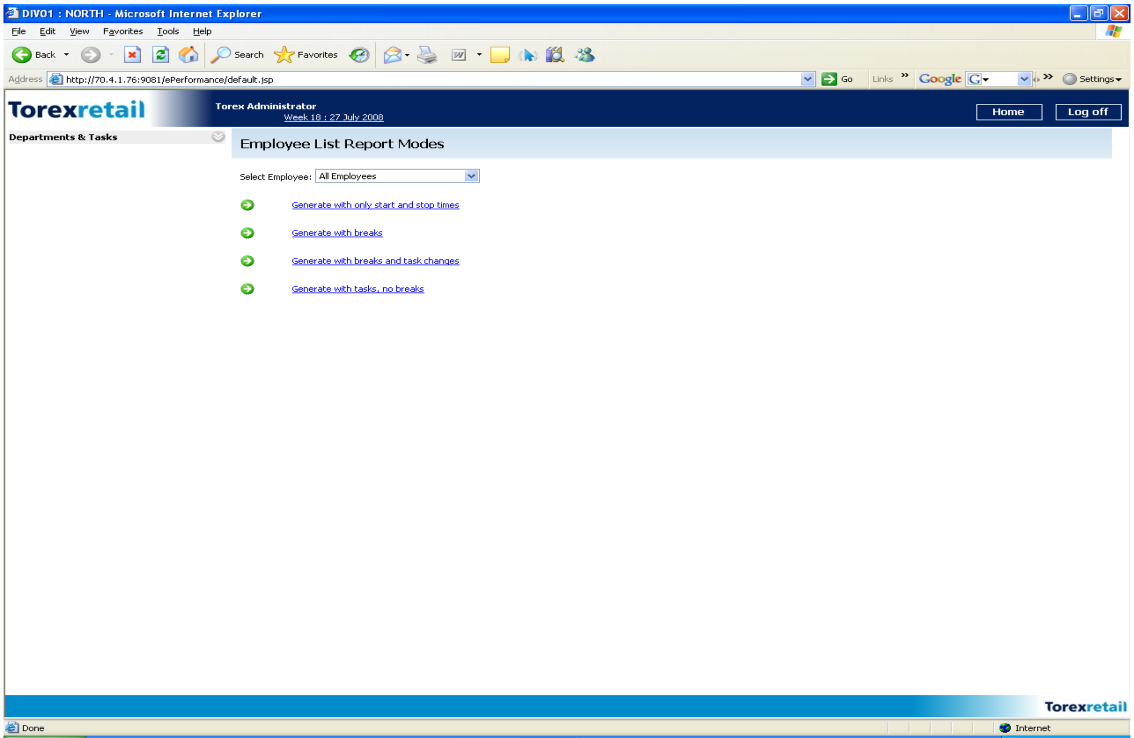
Department Schedule Report

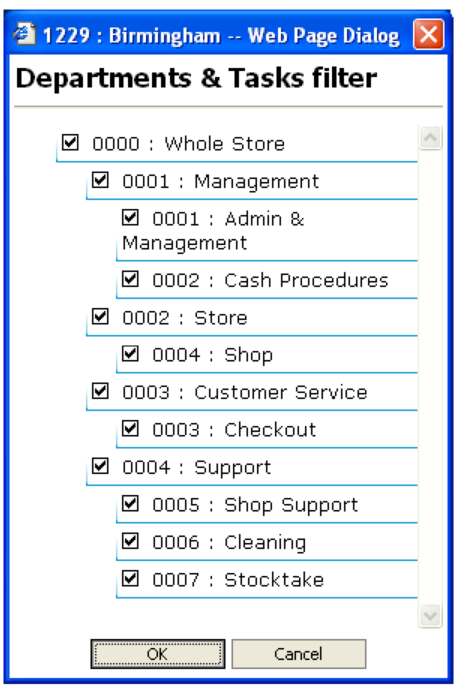
1. To view a Department Schedule Report, click 

.
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:

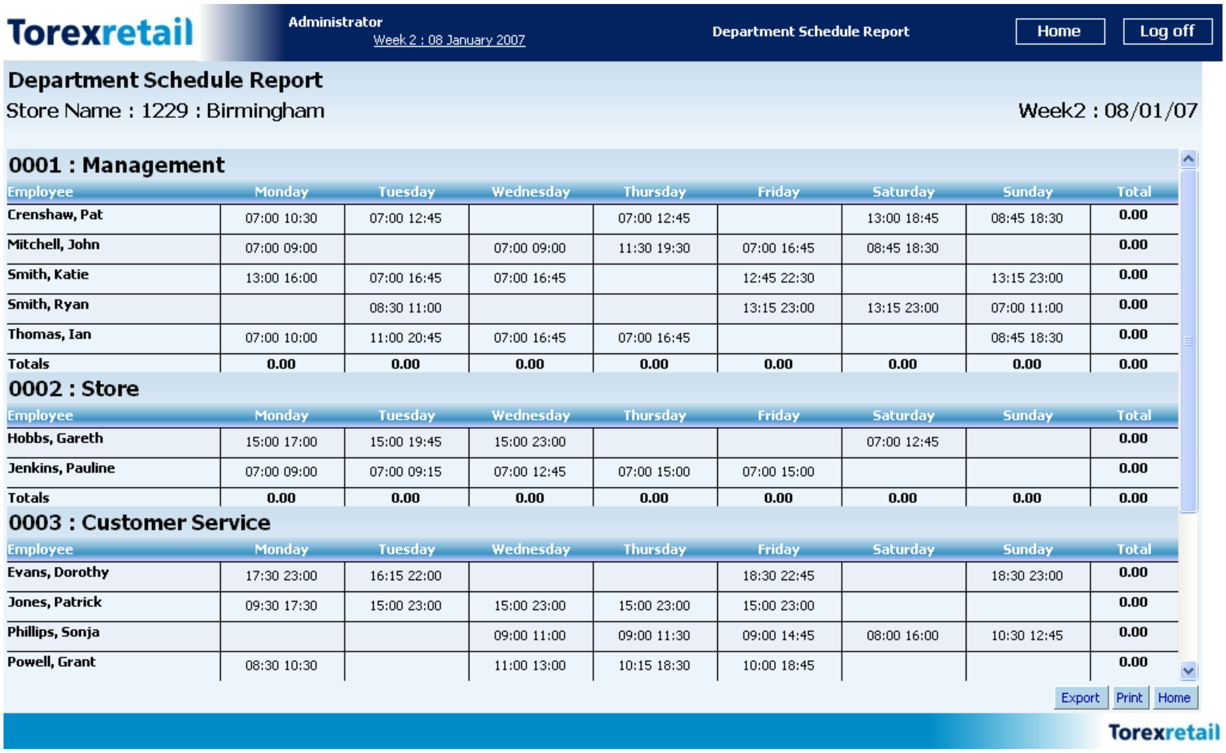


Departments &Tasks Filter window

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:



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

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

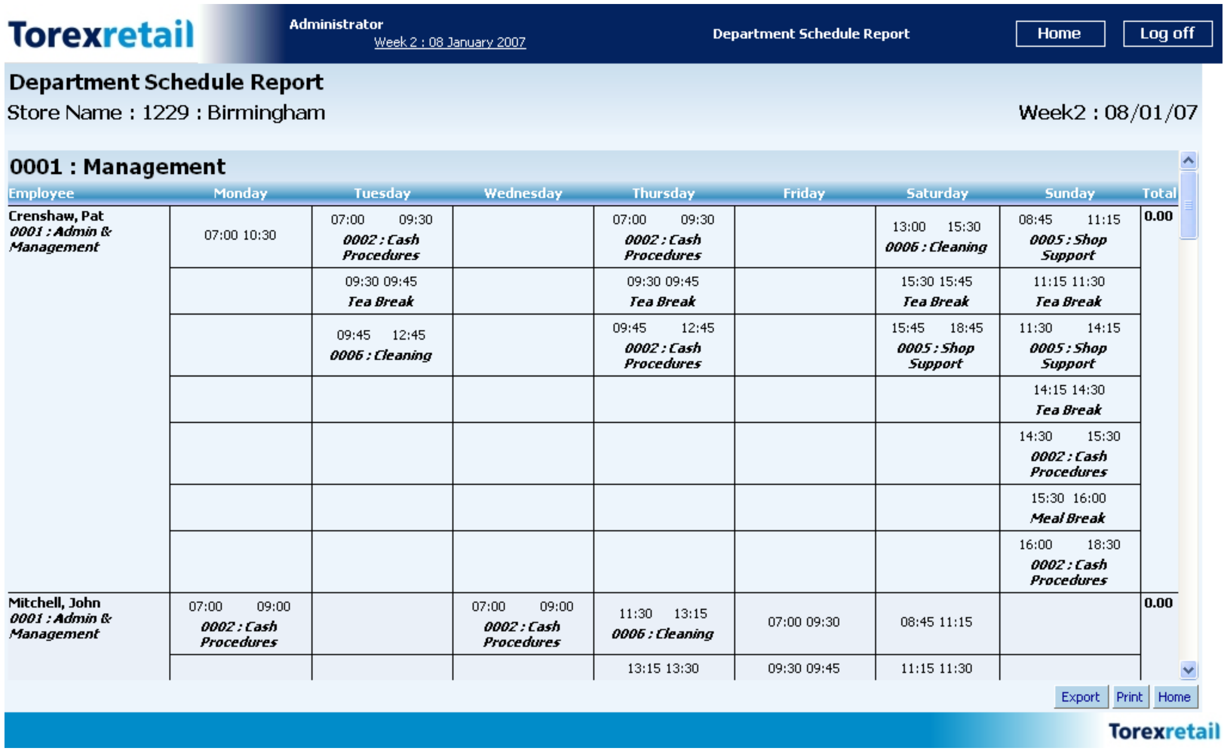
1. Clicking **Export** will convert the file into an Adobe Acrobat pdf document.

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:



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		

Report window

2. 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

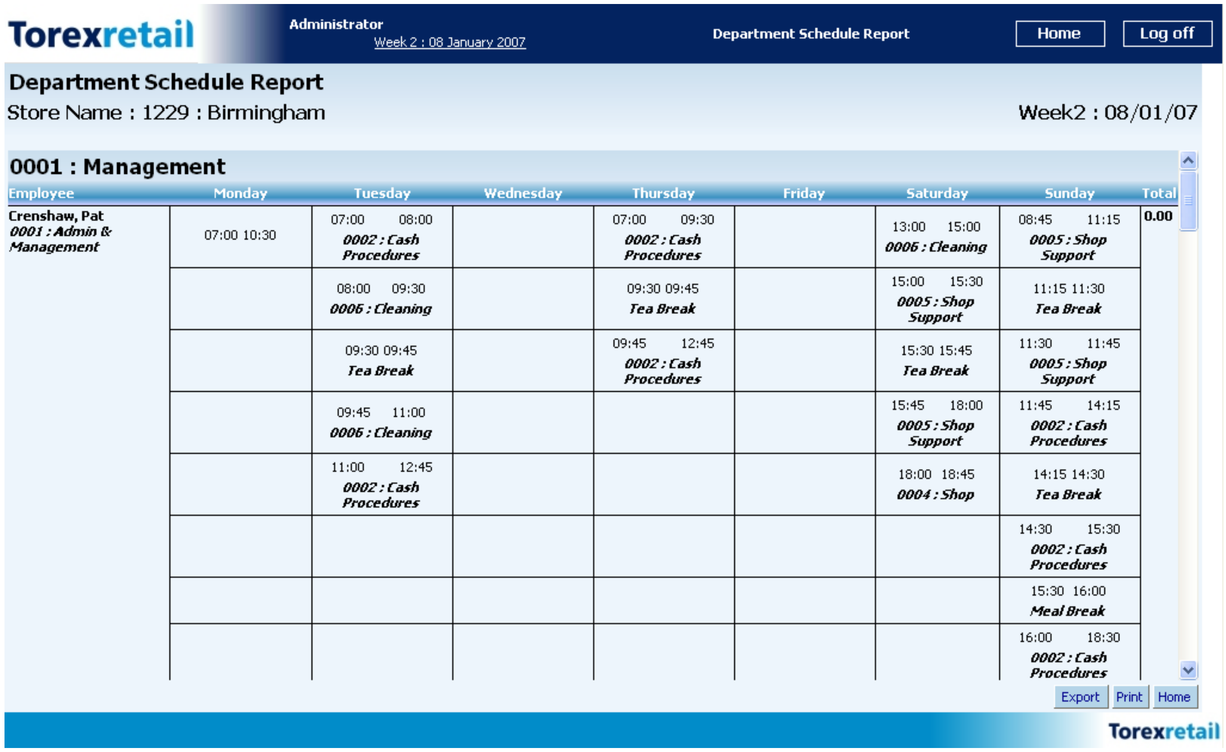
1. Clicking **Export** will convert the file into an Adobe Acrobat pdf document.

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 and Task Changes

1. Clicking on this link, will display a report, similar to that below:



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*	

Report window

2. 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

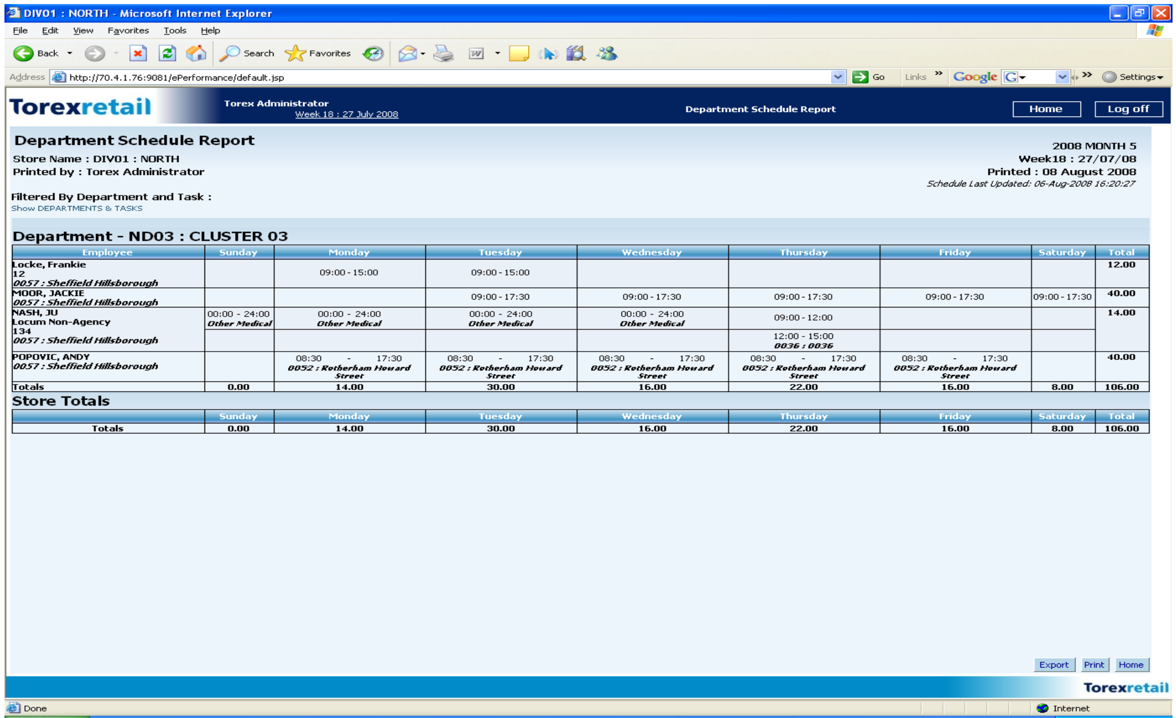
1. Clicking **Export** will convert the file into an Adobe Acrobat pdf document.

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 Tasks, No Breaks

1. Clicking on this link, will display a report, similar to that below:



Report window

2. 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.
3. 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 b y 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

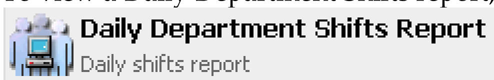
1. Clicking **Export** will convert the file into an Adobe Acrobat pdf document.

Print

1. Clicking **Print**, will open a standard print dialog box.
2. Select the relevant printer and click **OK**.

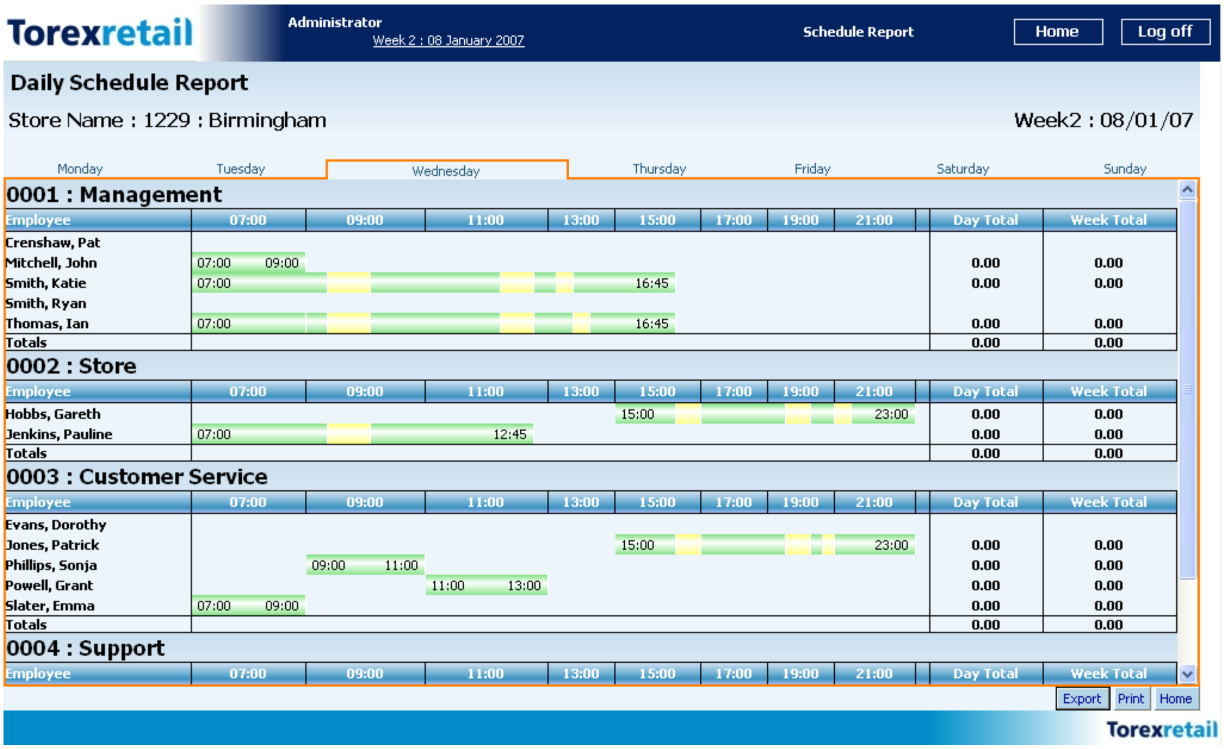
3. The report will be printed.

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.

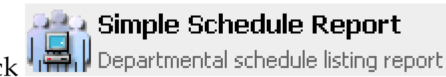
Export

1. Clicking **Export** will convert the file into an Adobe Acrobat pdf document.

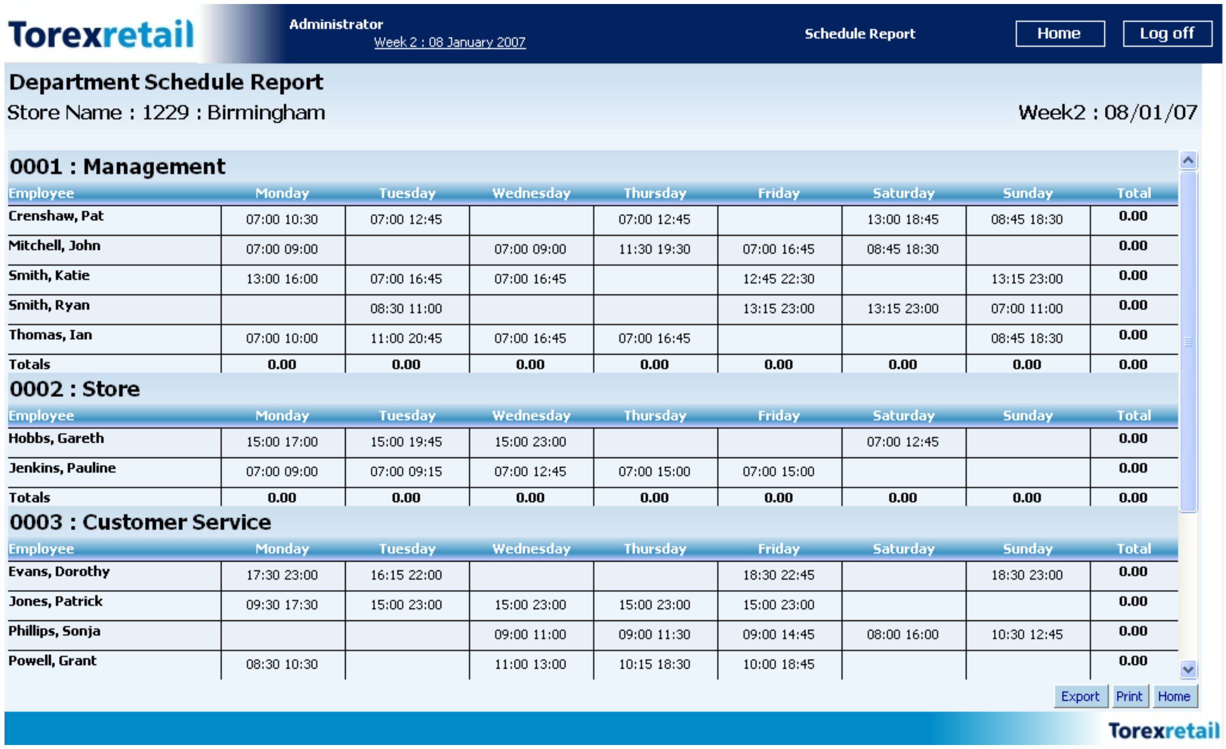
Print

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

1. To view a Simple Schedule Report, click 

.
2. This will display a screen, 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	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

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.

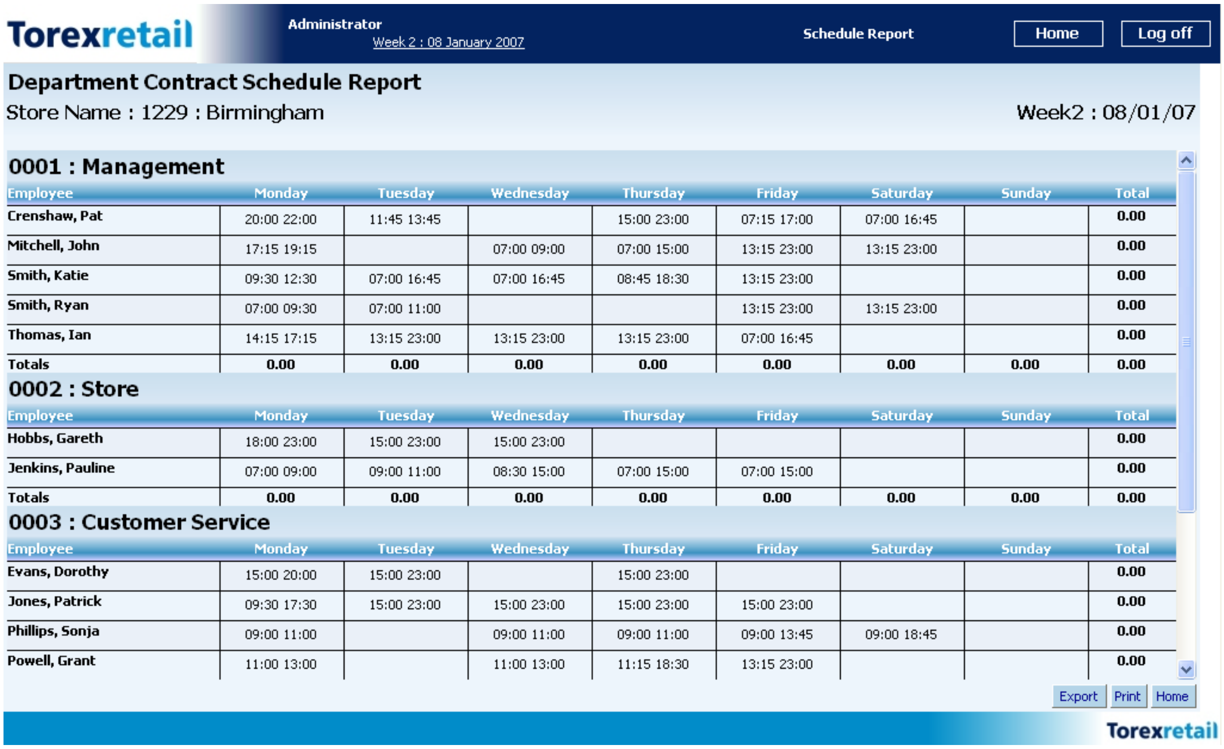
Print

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

1. To view the Contract Report, click  button.

2. This will display a screen, similar to that below:



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

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.

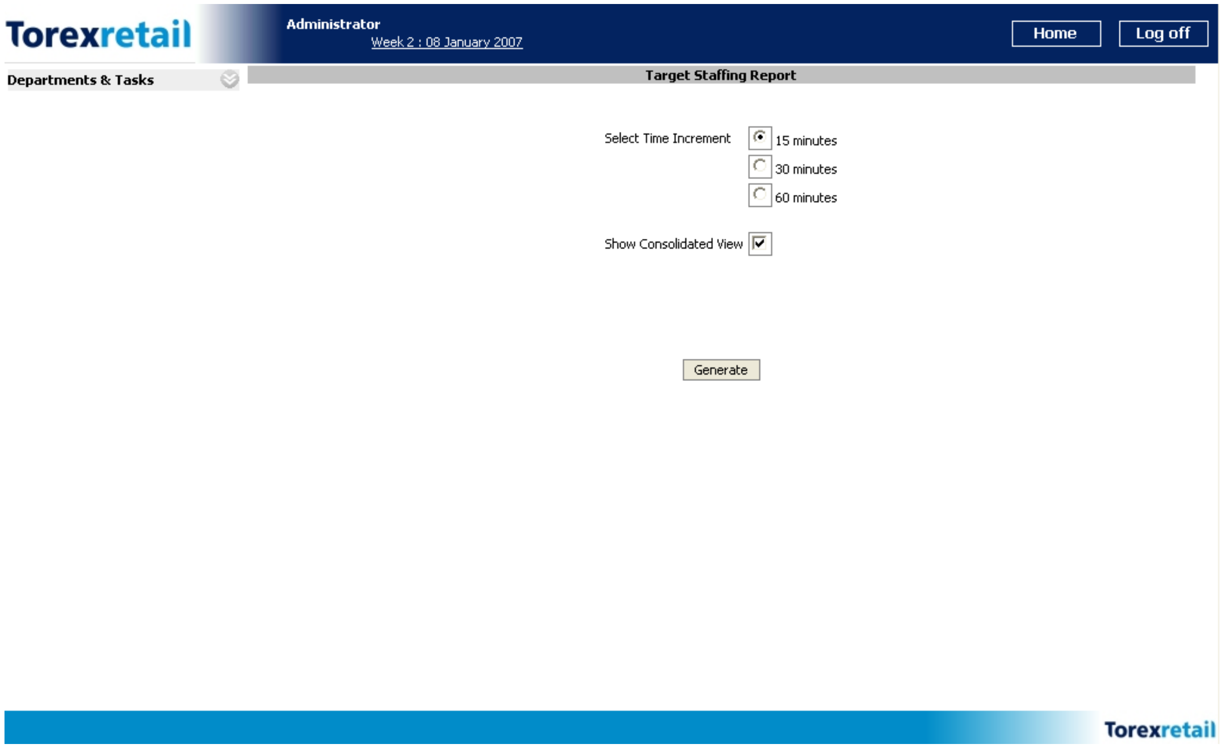
Print

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

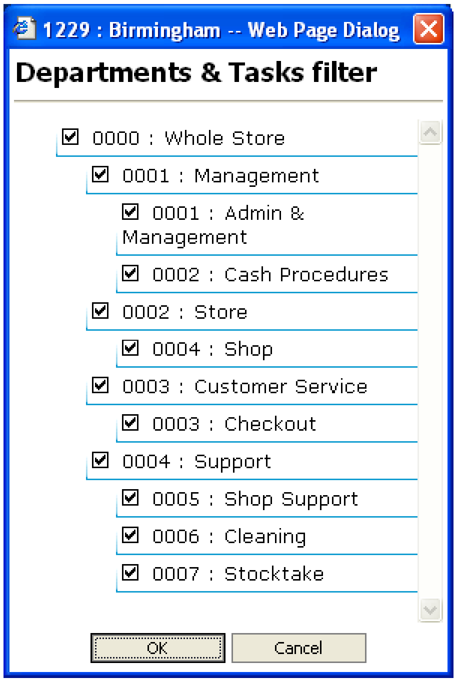
1. To view the Target Staffing Report, click 

.
2. This will display a screen, similar to that below:



Target Staffing Report window

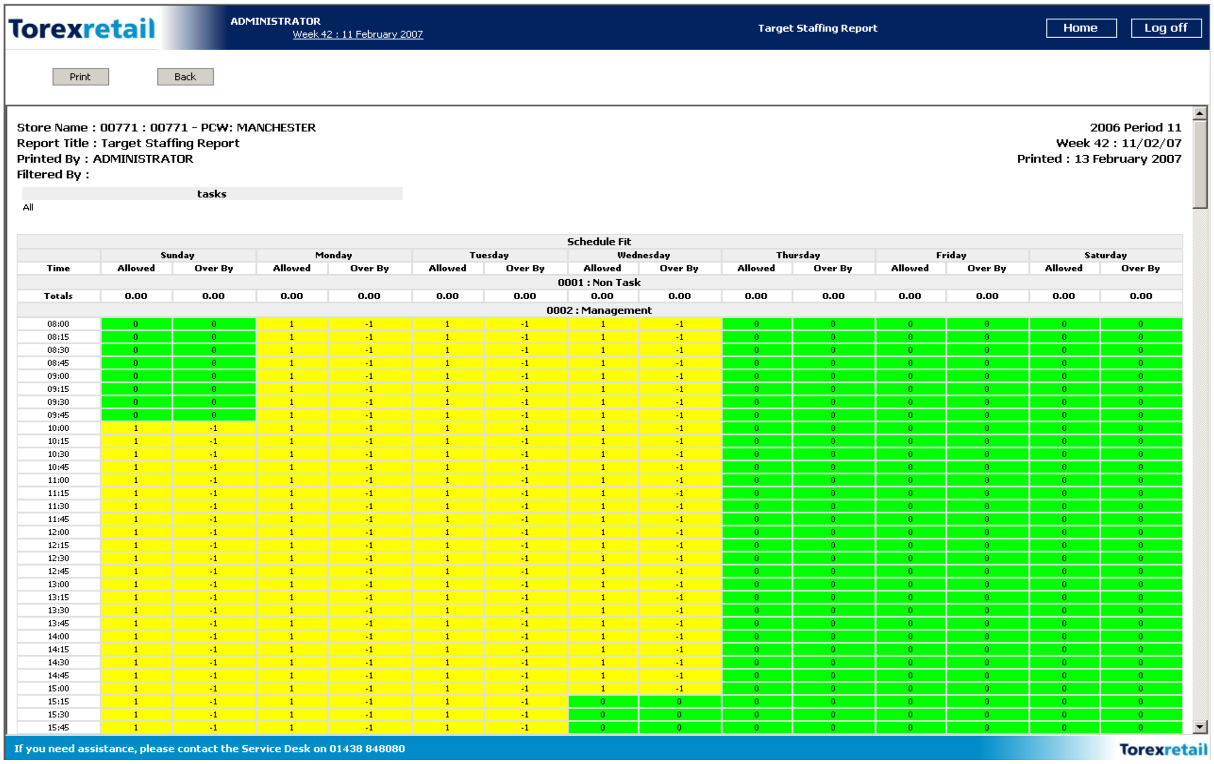
3. Clicking **Departments & Tasks** link, on the left hand side of the screen, will display a window, similar to that below:



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.



Schedule Fit														
	Sunday		Monday		Tuesday		Wednesday		Thursday		Friday		Saturday	
Time	Allowed	Over By	Allowed	Over By	Allowed	Over By	Allowed	Over By	Allowed	Over By	Allowed	Over By	Allowed	Over By
0001 : Non Task														
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
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

Report window

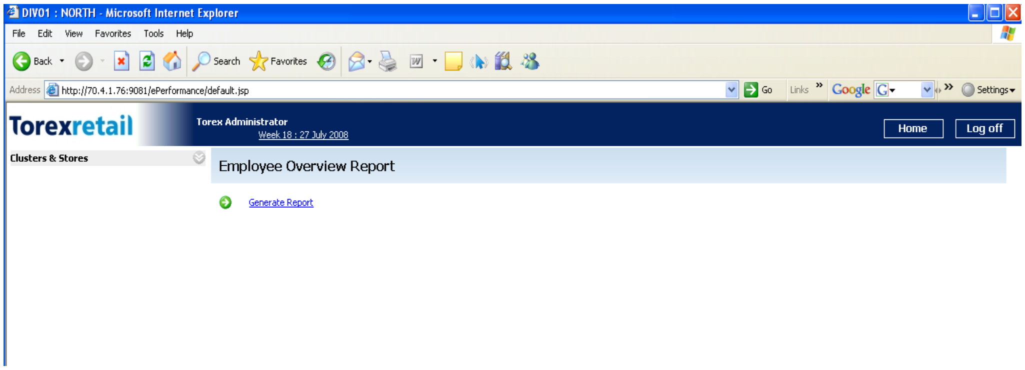
Print

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

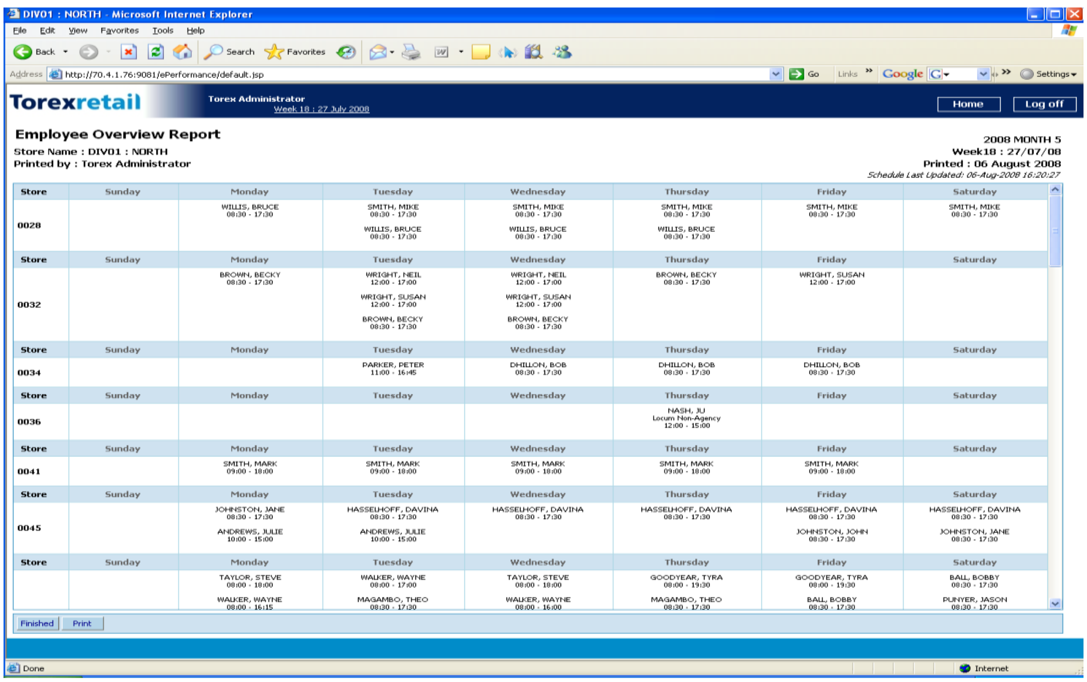
The Employee Overview Report is a simple report detailing which employees are working in which departments, on which tasks each day. The report displays shift start and end times under each employees name.

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

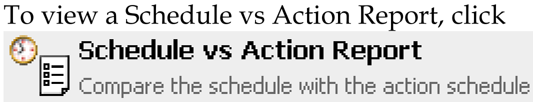
4. Select which Departments and Tasks you wish to be displayed on the report by clicking heading underneath the store logo
5. Tick or un-tick Departments and/or Tasks to make your filter selections
6. Click Generate Report link.
7. This will open up the report. See below:



Report window

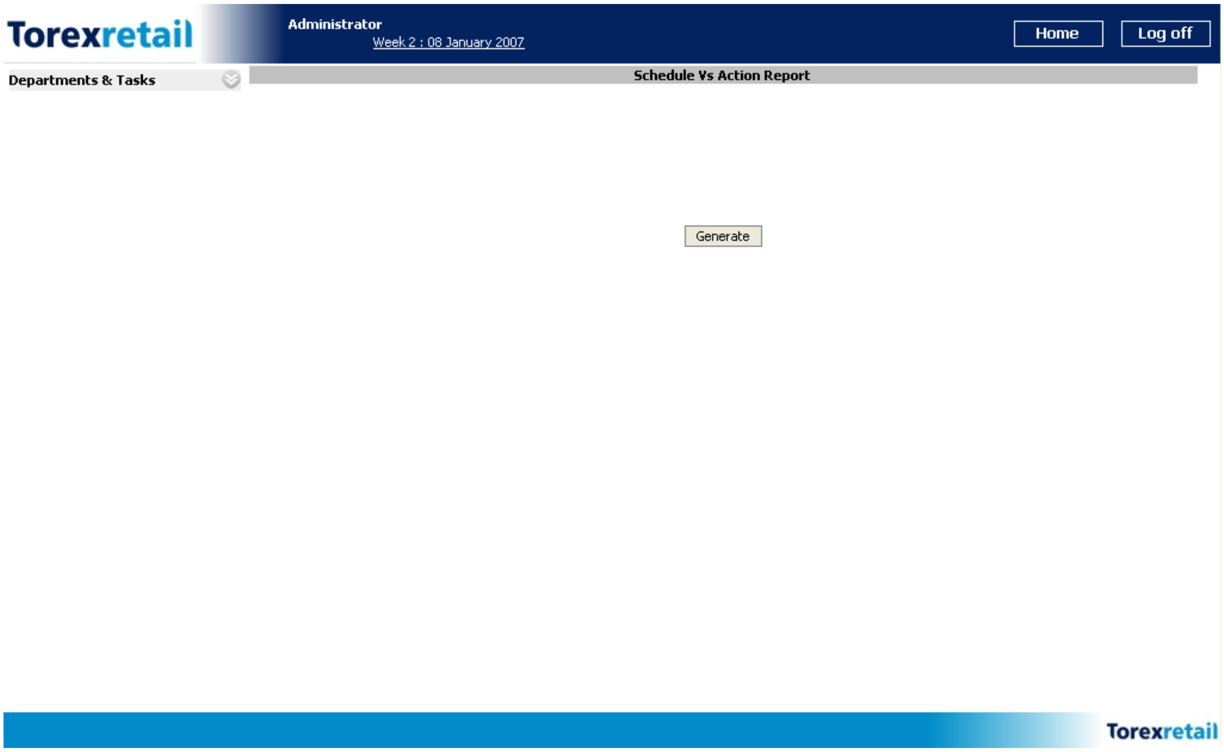
Schedule vs Action Report

1. To view a Schedule vs Action Report, click



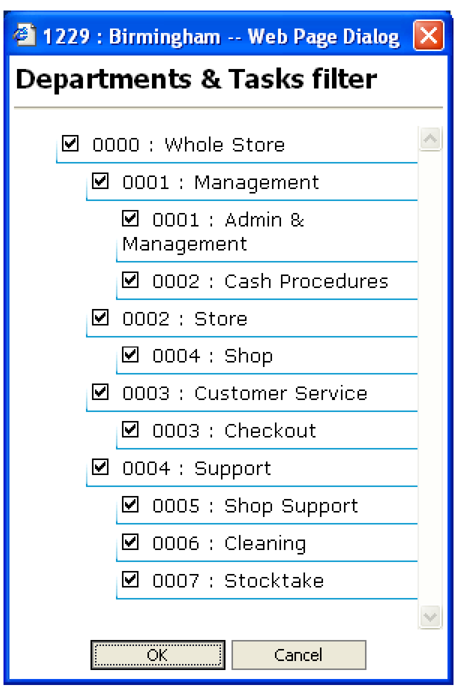
.

2. This will display a screen, similar to that below:



Schedule Vs Action Report window

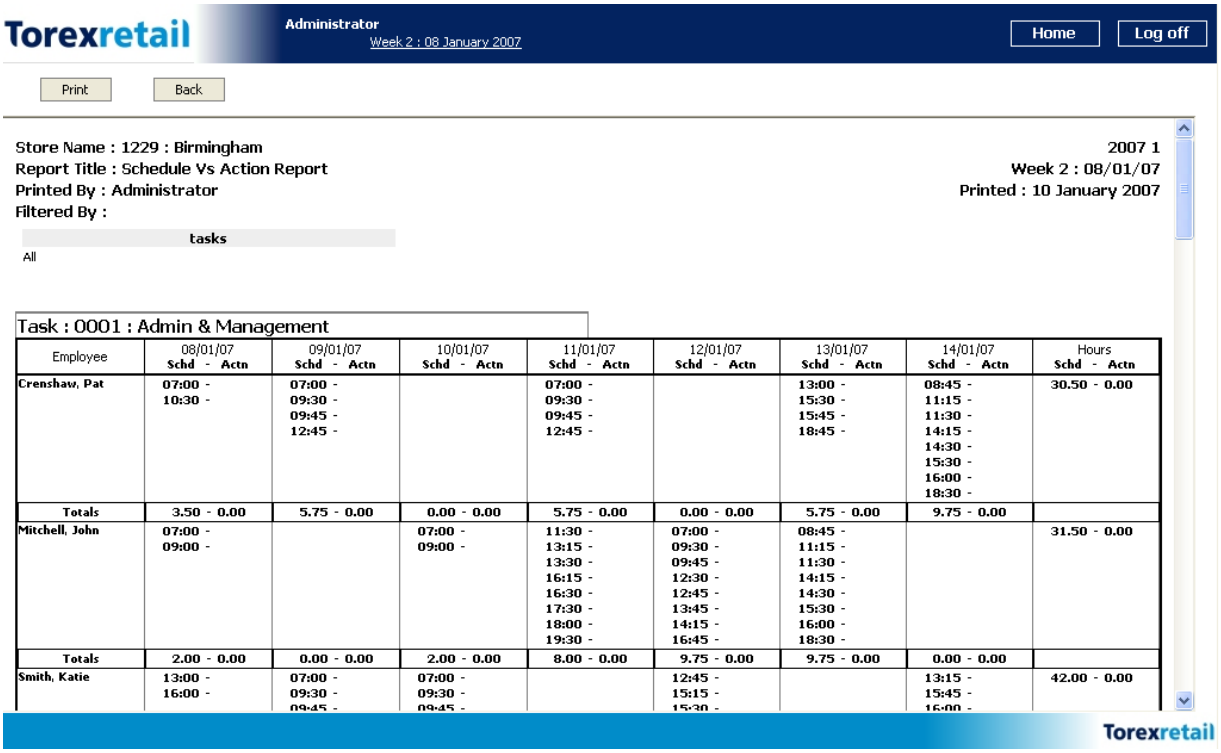
3. Clicking **Departments & Tasks** link, on the left hand side of the screen, will display a window, similar to that below:



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.



Employee	08/01/07 Schd - Actn	09/01/07 Schd - Actn	10/01/07 Schd - Actn	11/01/07 Schd - Actn	12/01/07 Schd - Actn	13/01/07 Schd - Actn	14/01/07 Schd - Actn	Hours Schd - 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

6. The report displays a list of all of the employees in the store, showing the scheduled hours and the actual hours worked.

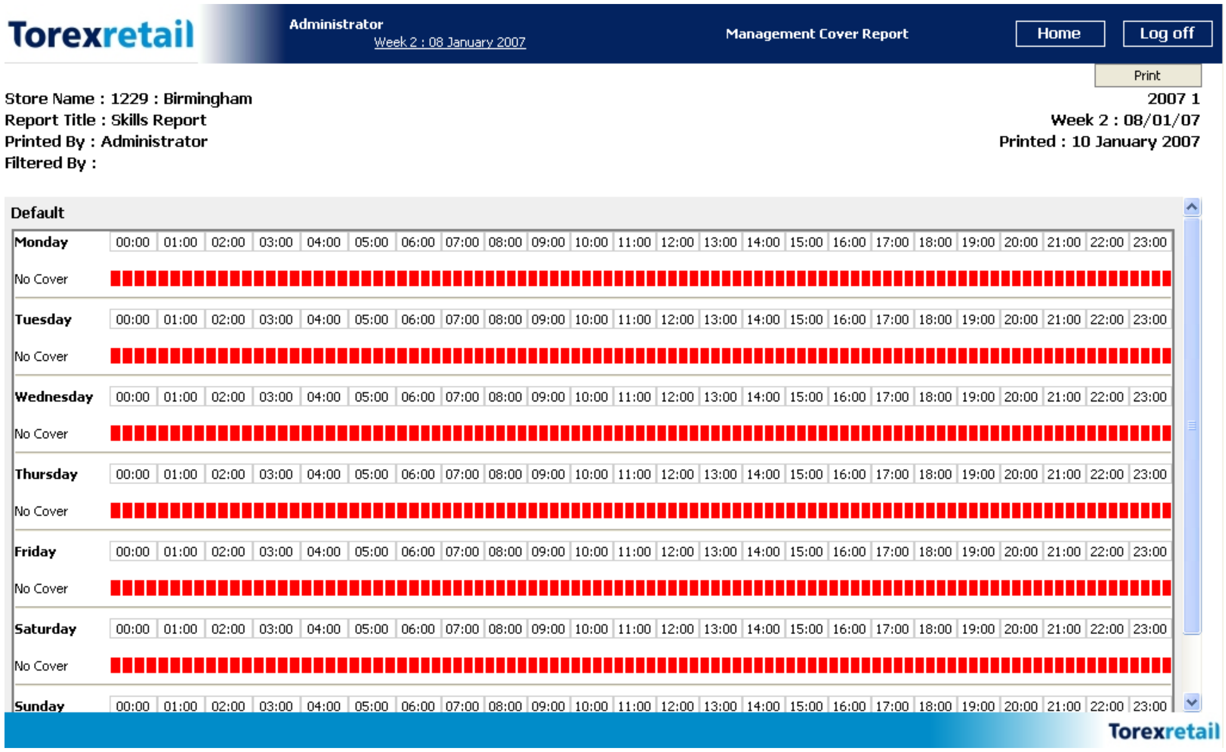
Print

1. Clicking **Print**, will open a standard print dialog box.
2. Select the relevant printer and click **OK**.
3. The report will be printed.

Management Cover Report

1. To view the Management Cover Report, click 

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



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

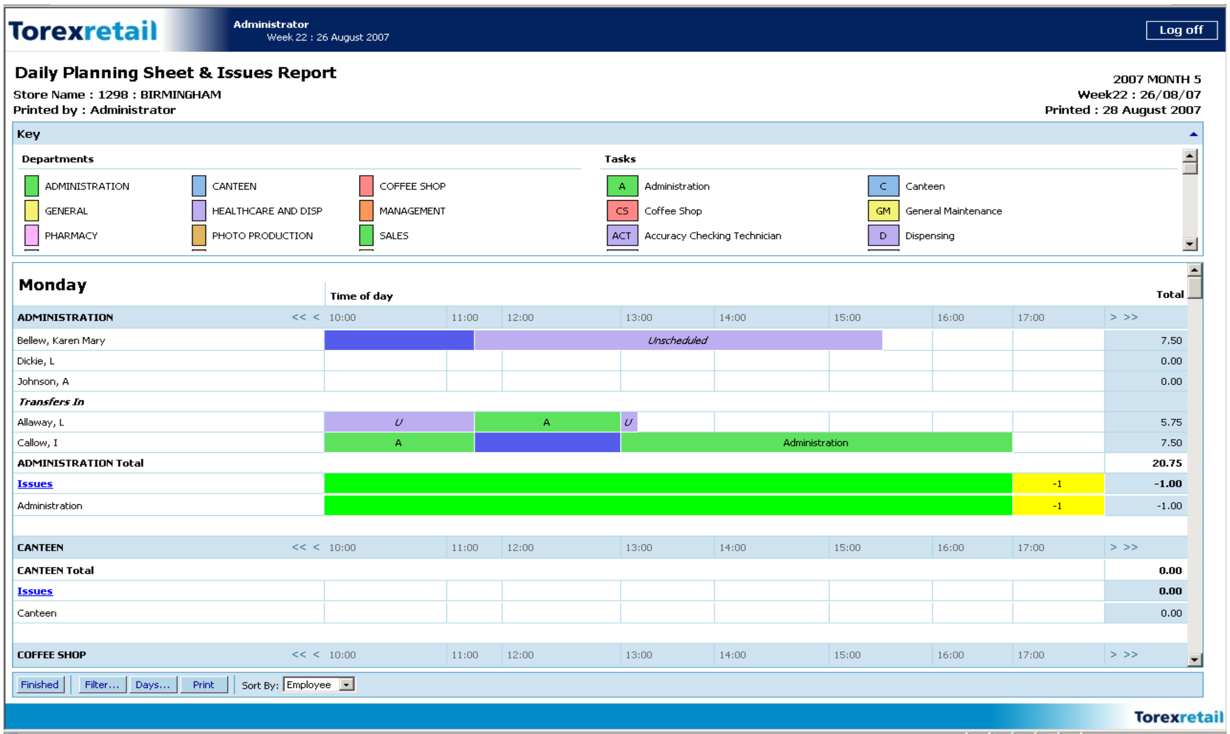
1. Clicking **Print**, will open a standard print dialog box.
2. Select the relevant printer and click **OK**.
3. The report will be printed.

Daily/Weekly Planning Sheet

1. To view the Daily Planning Sheet, click

.

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



Report window

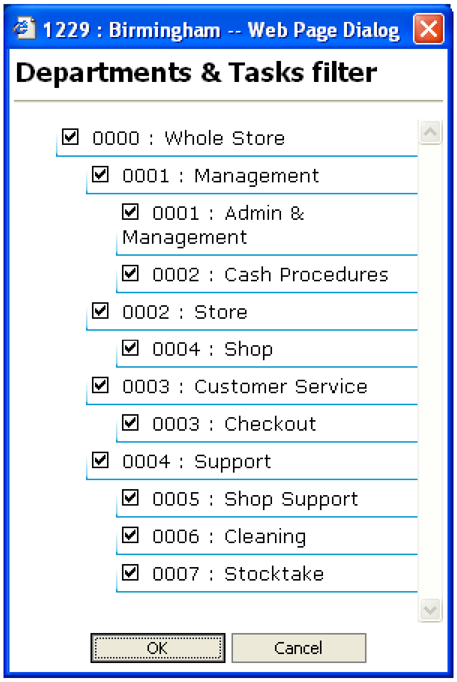
3. At the top of the report is a key showing each department and task and the colors assigned to them for use within this report. Underneath this is the report itself displaying a timeline of hours across the top and employees down the side. These are sorted by department, with an issue summary under 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).
4. 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.
5. 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

1. 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:

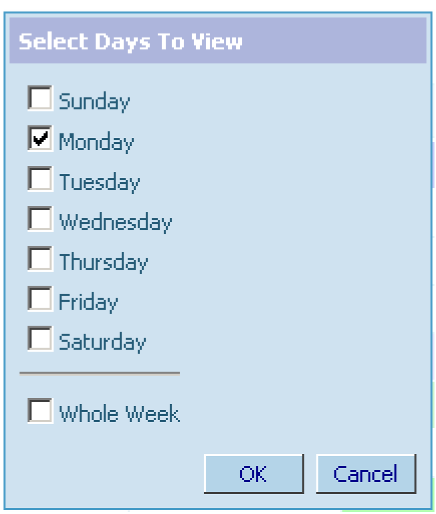


Departments & Tasks Filter window

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.

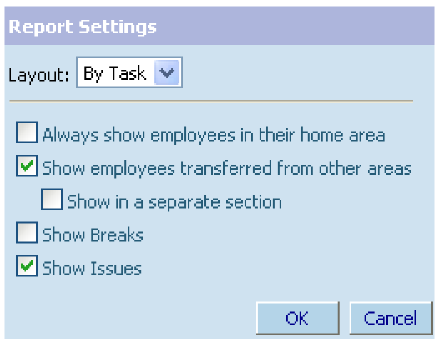
Note, some versions of this report have a toolbar at the top of the screen like that below, instead of the buttons at the bottom, however they function in the same way:

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 

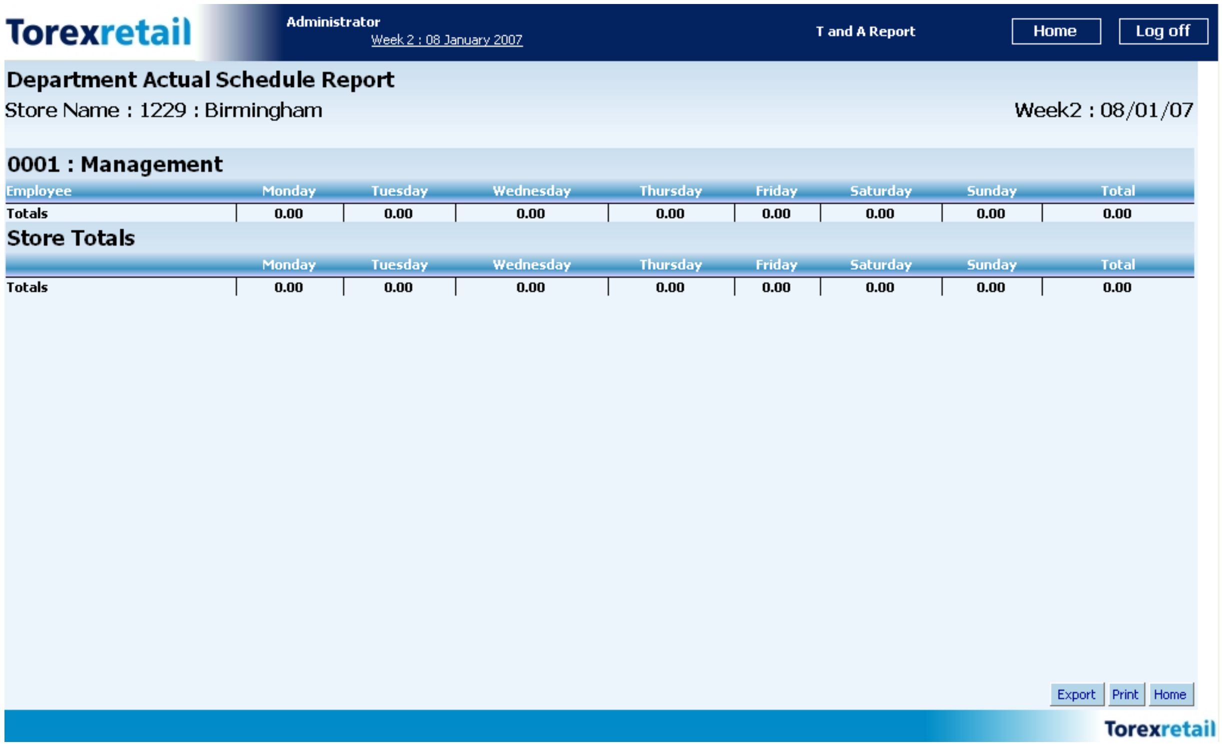
button and then the 

.

T&A Report

1. To run a **T&A Report**, click 

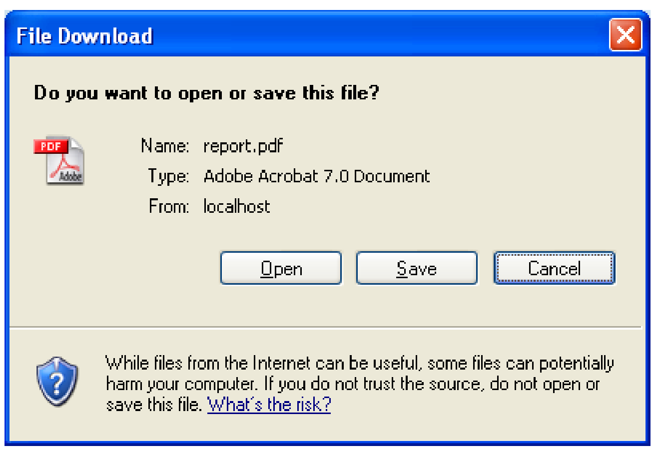
.
2. A screen will be displayed, which will appear similar to that below:



Report window

Export

1. Clicking **Export**, at the bottom of the screen, will display a window, similar to that below:



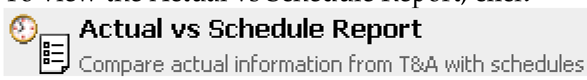
File Download window

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.

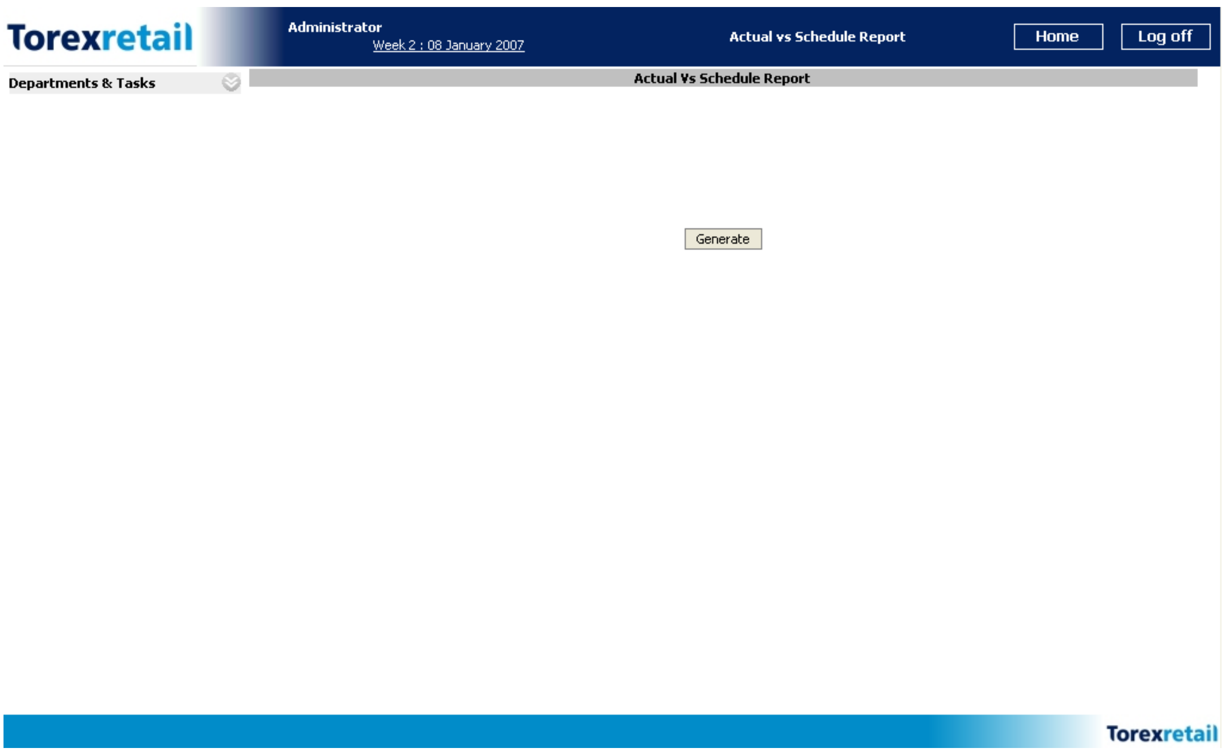
Print

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

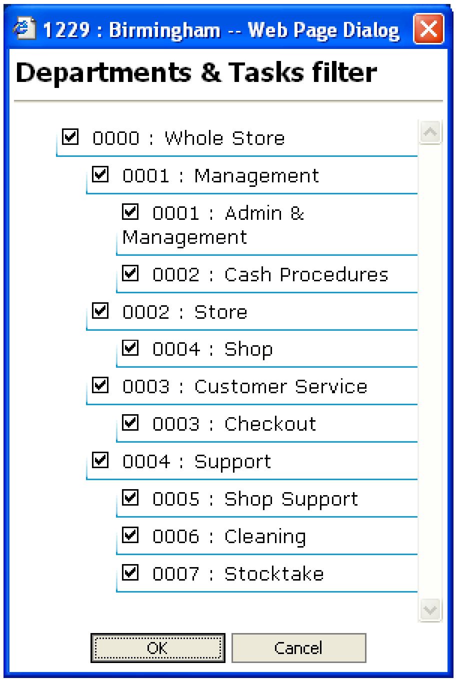
1. To view the Actual vs Schedule Report, click


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



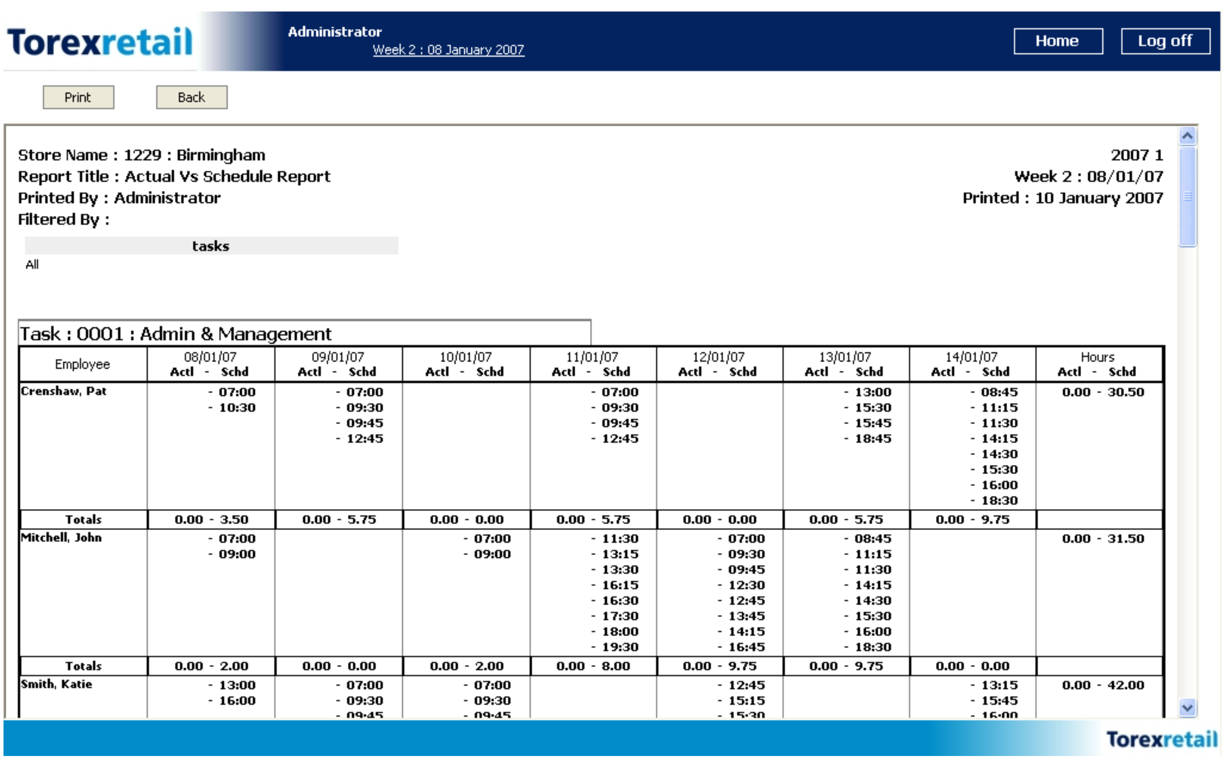
Actual Vs Schedule window

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



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.



Store Name : 1229 : Birmingham
Report Title : Actual Vs Schedule Report
Printed By : Administrator
Filtered By :

2007 1
Week 2 : 08/01/07
Printed : 10 January 2007

tasks
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
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

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.

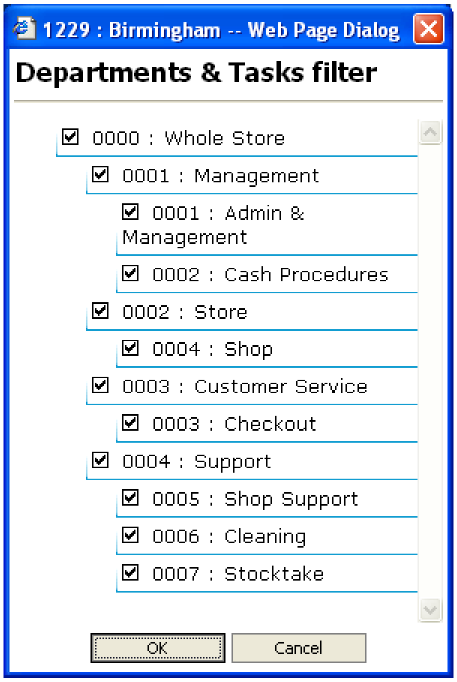
Actual vs Paid Report

1. To view the Actual vs Paid Report, click 

.

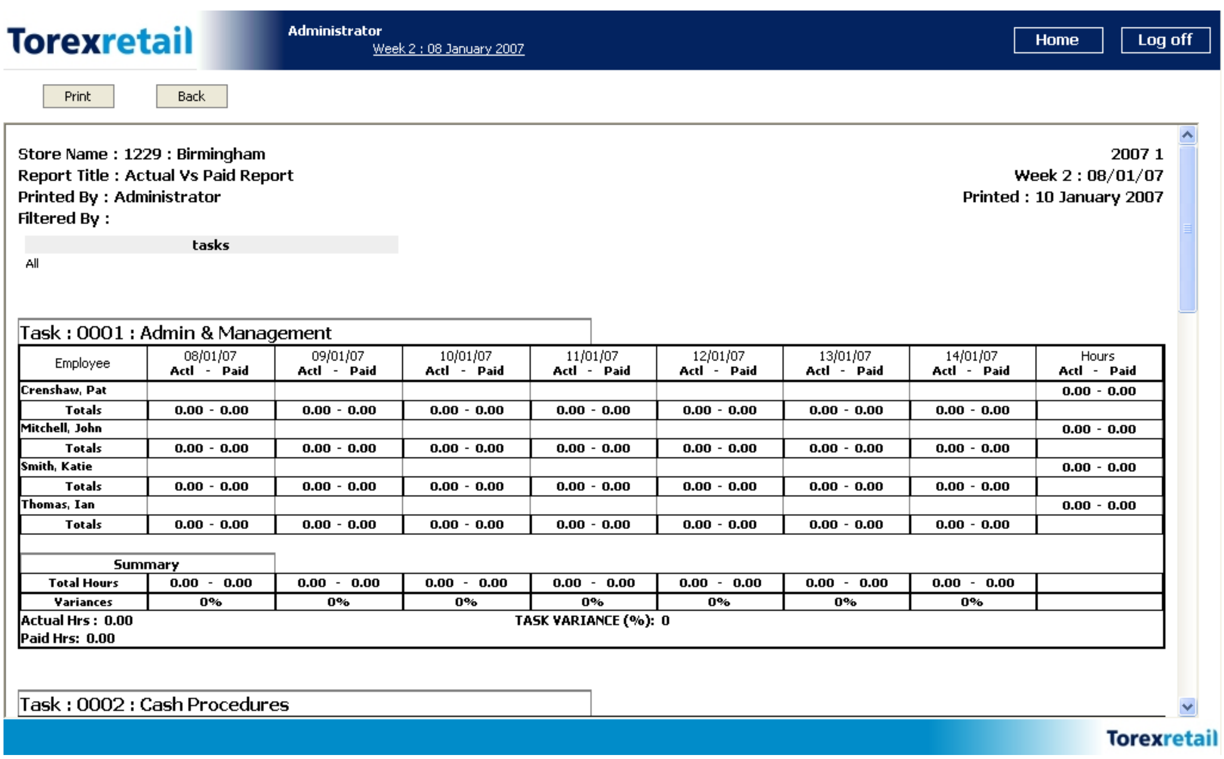
Actual Vs Paid Report window

2. Clicking **Departments & Tasks** link, on the left hand side of the screen, will display a window, similar to that below:



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.



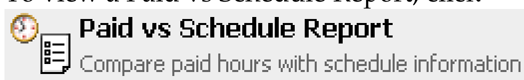
Report window

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.

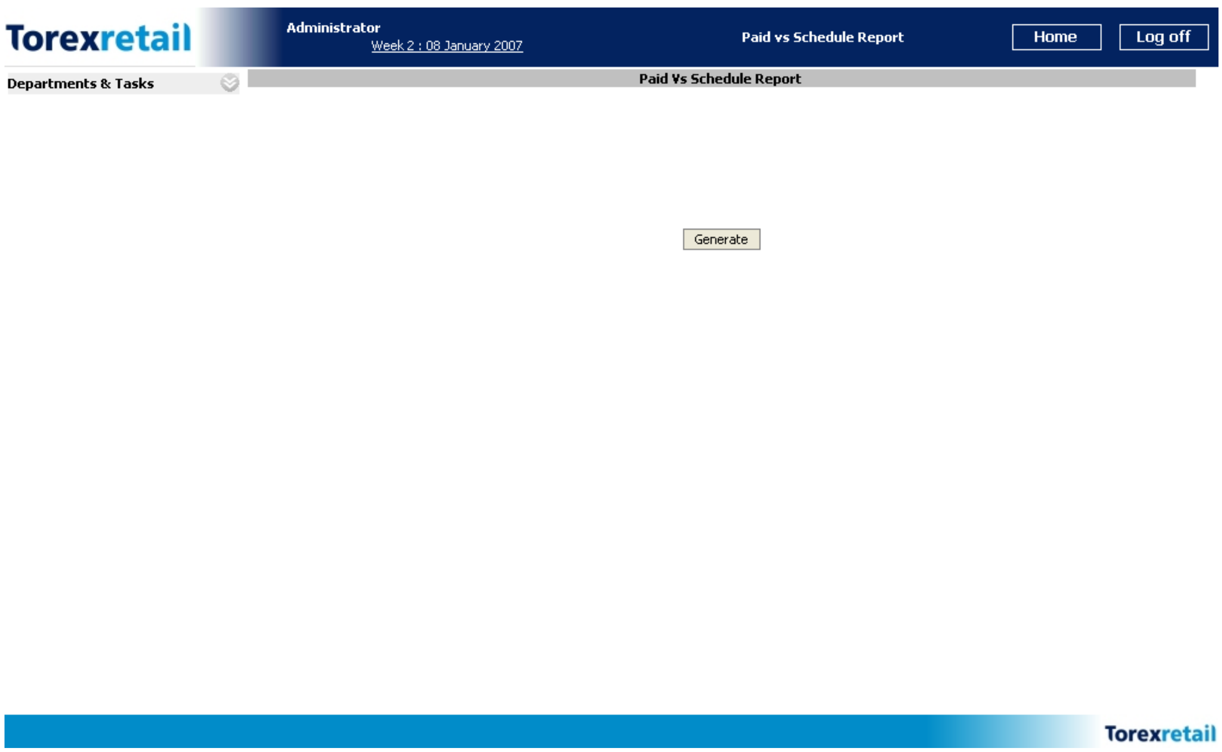
Print

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

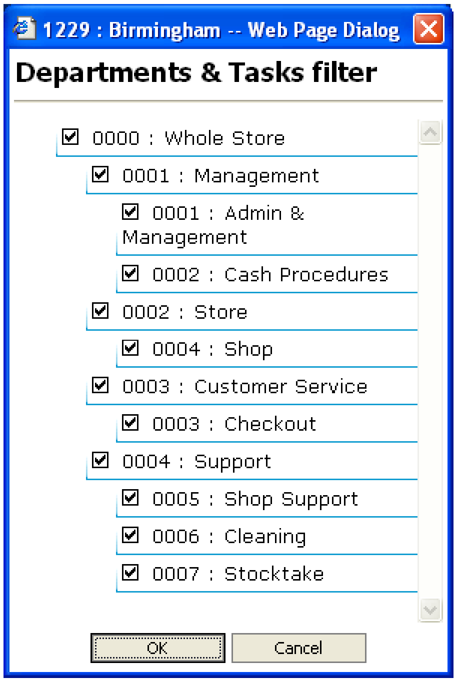
1. To view a Paid vs Schedule Report, click 

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



Paid Vs Schedule Report window

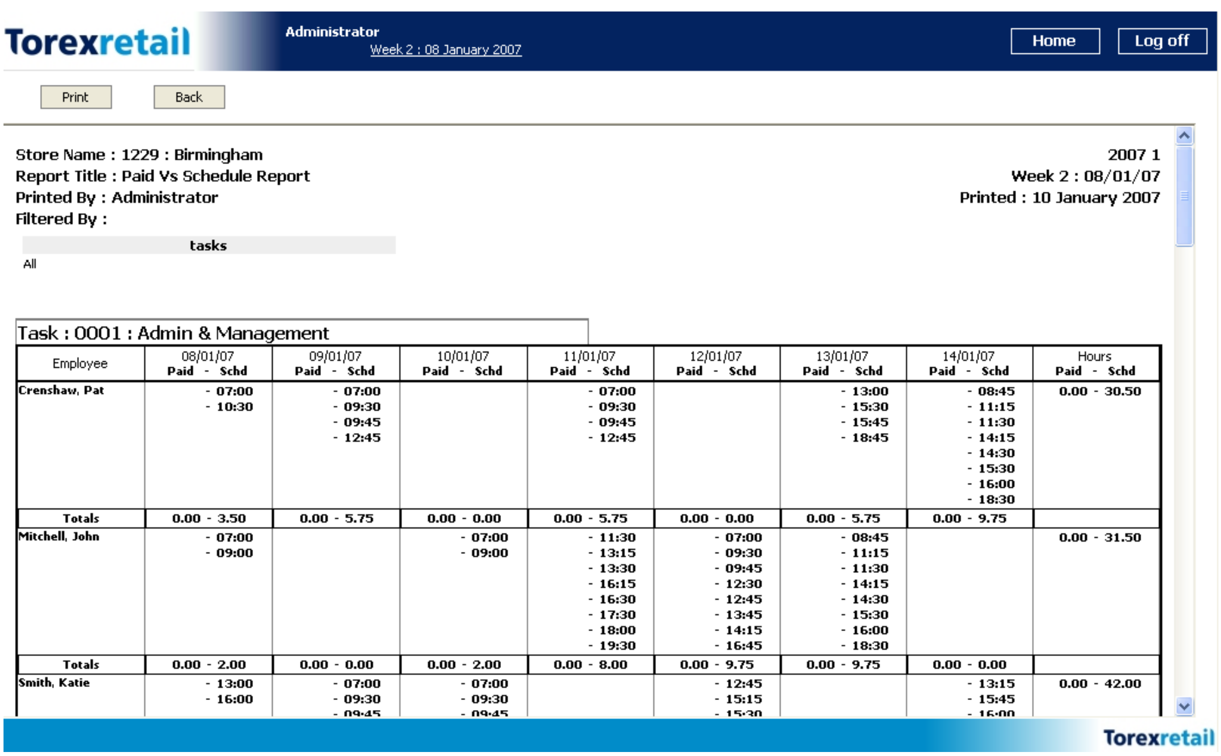
3. Clicking **Departments & Tasks** link, on the left hand side of the screen, will display a window, similar to that below:



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.



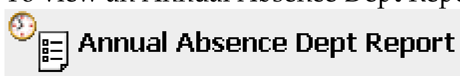
Report window

6. The report displays a list of all of the employees in the store, split by department, showing the paid hours and the scheduled hours worked.

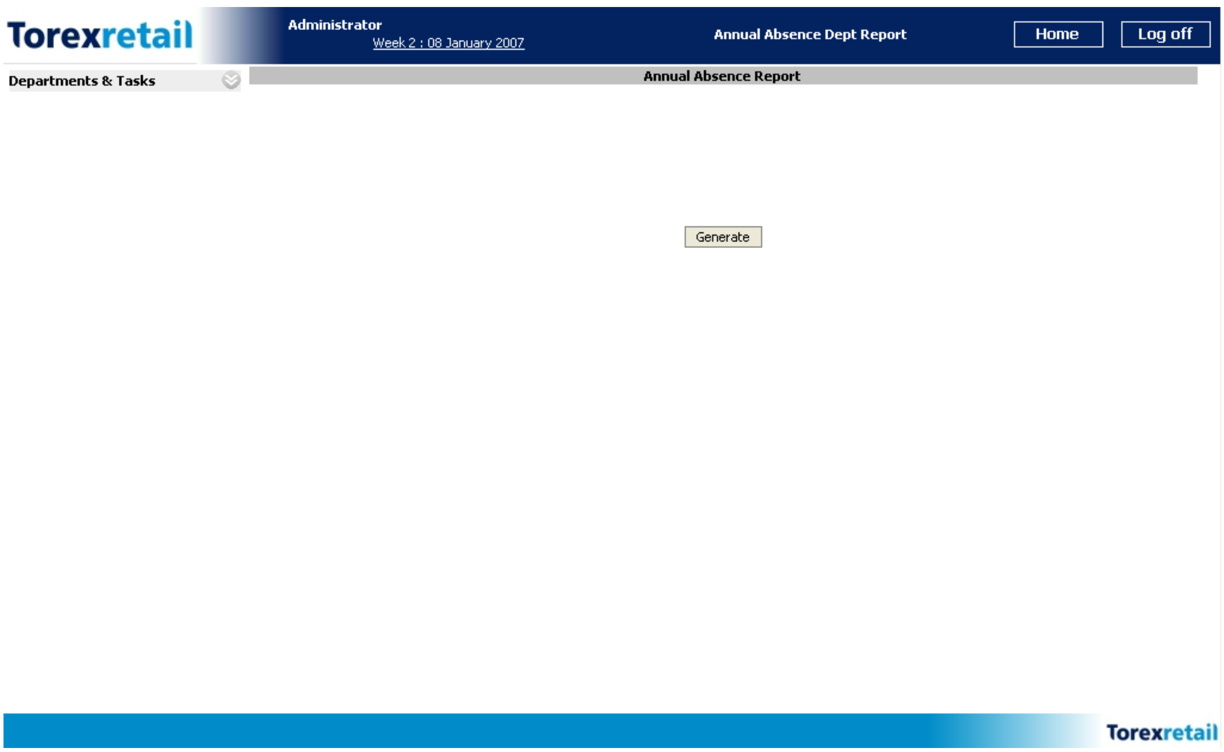
Print

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

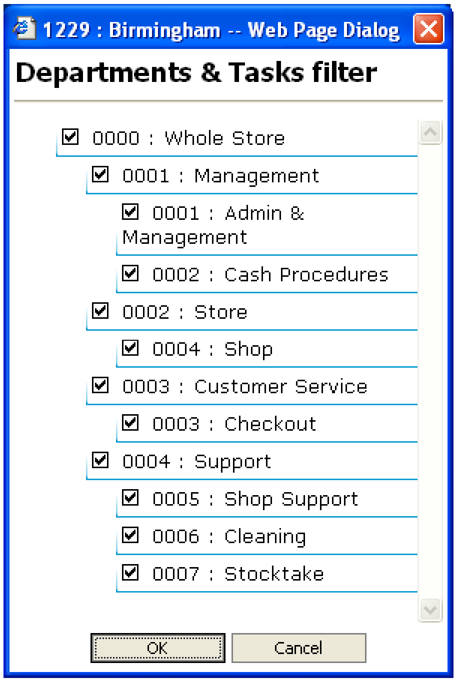
1. To view an Annual Absence Dept Report, click 

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



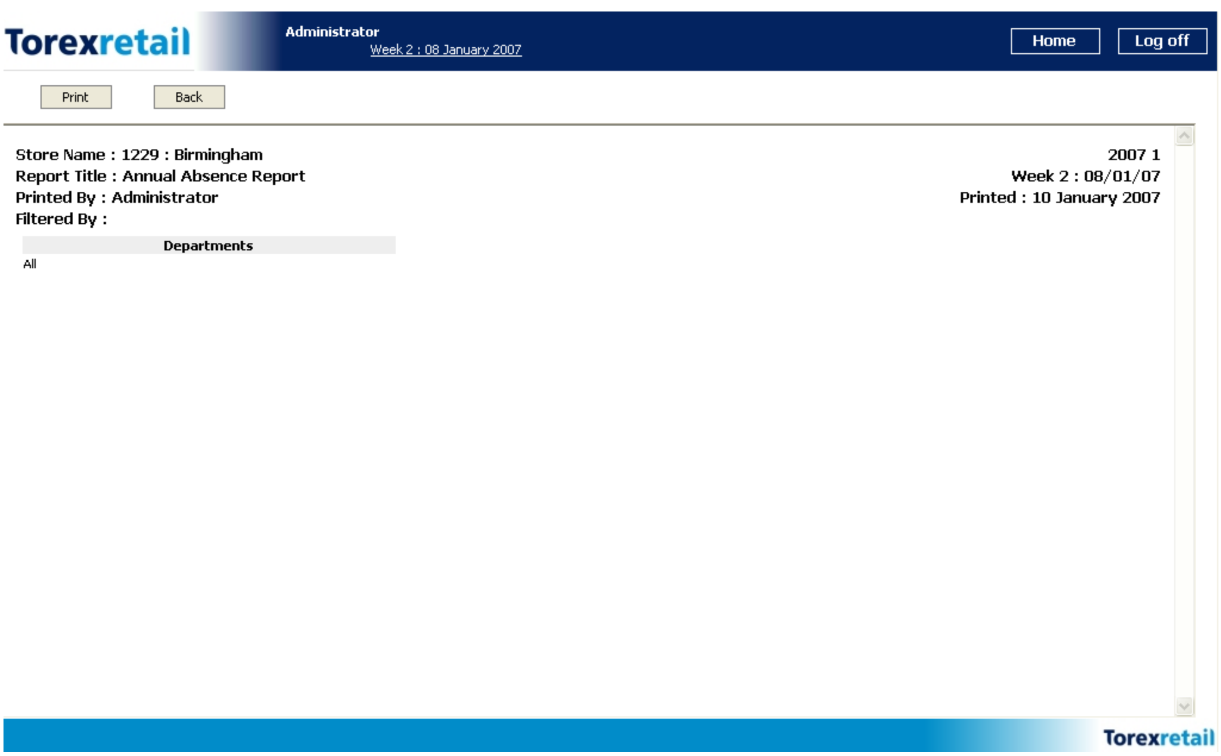
Annual Absence Report window

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.



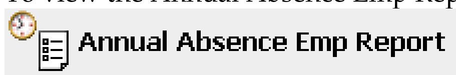
Report window

6. The report displays a list of all of the employees in the store, showing their absences.

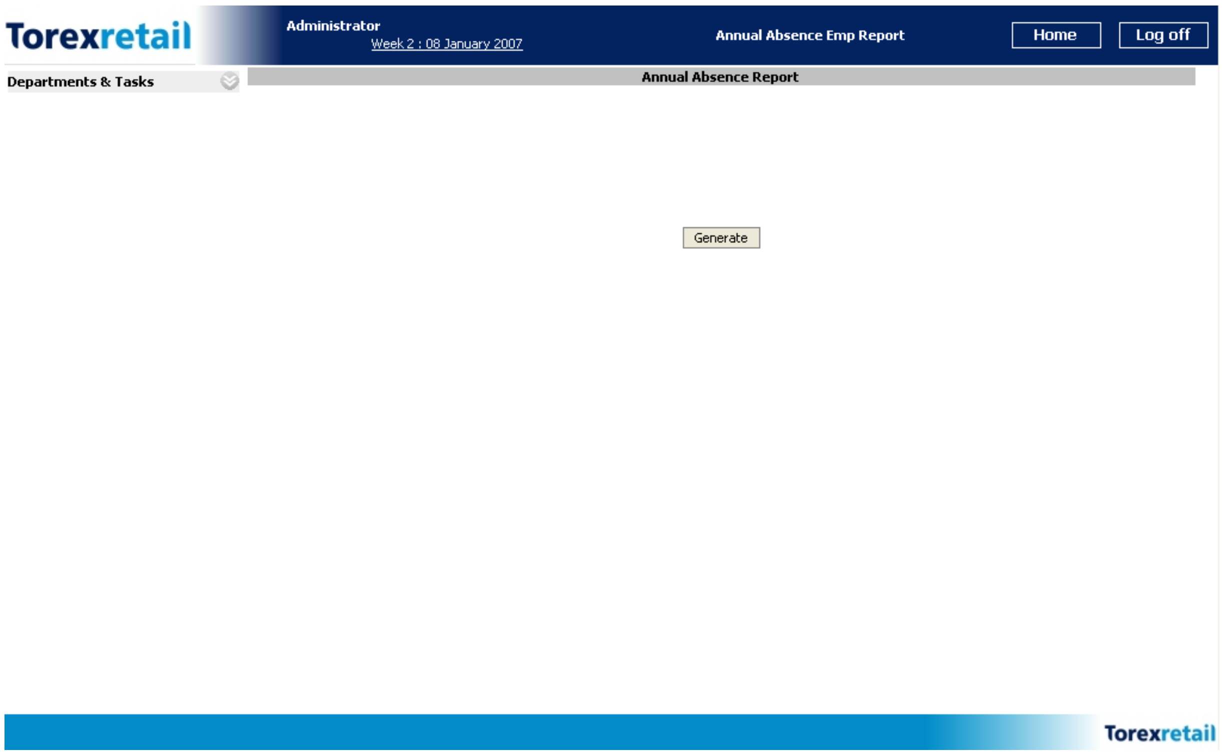
Print

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

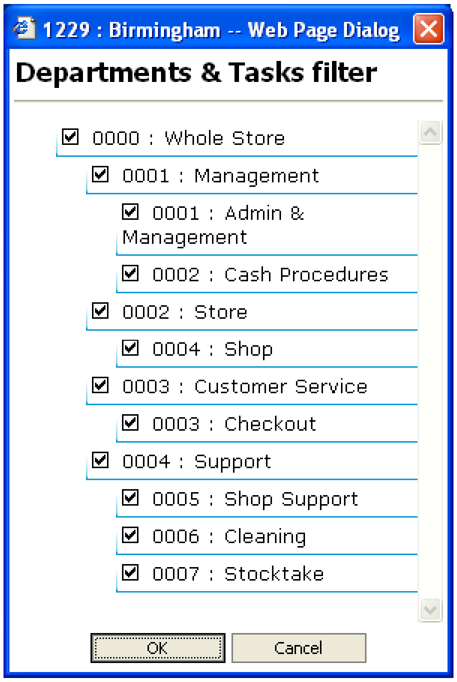
1. To view the Annual Absence Emp Report, click 

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



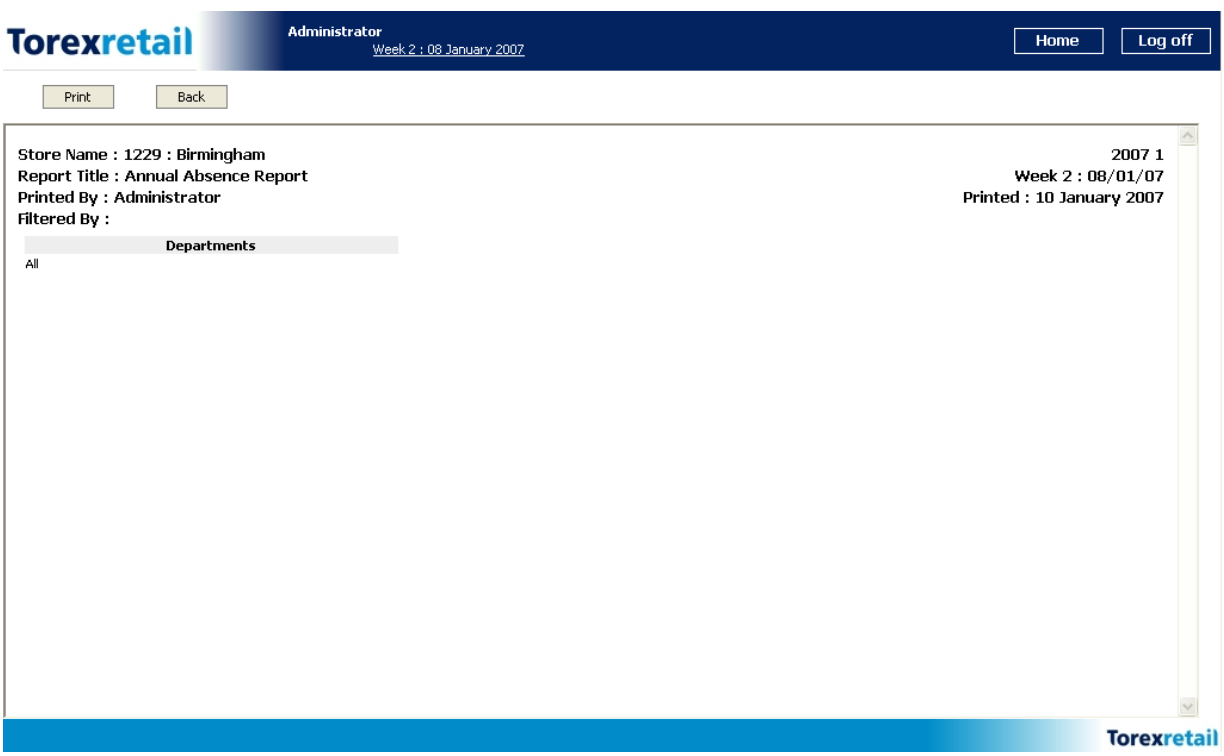
Annual Absence Report window

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 

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

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 

.

Actual vs Schedule Report

1. See page 268 for further information on the Actual vs Schedule Report.

Paid vs Schedule Report

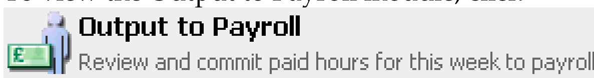
1. See page 272 for further information on the Paid vs Schedule Report.

Schedule vs Action Report

1. See page 259 for further information on the Schedule vs Action Report.

10

Output to Payroll

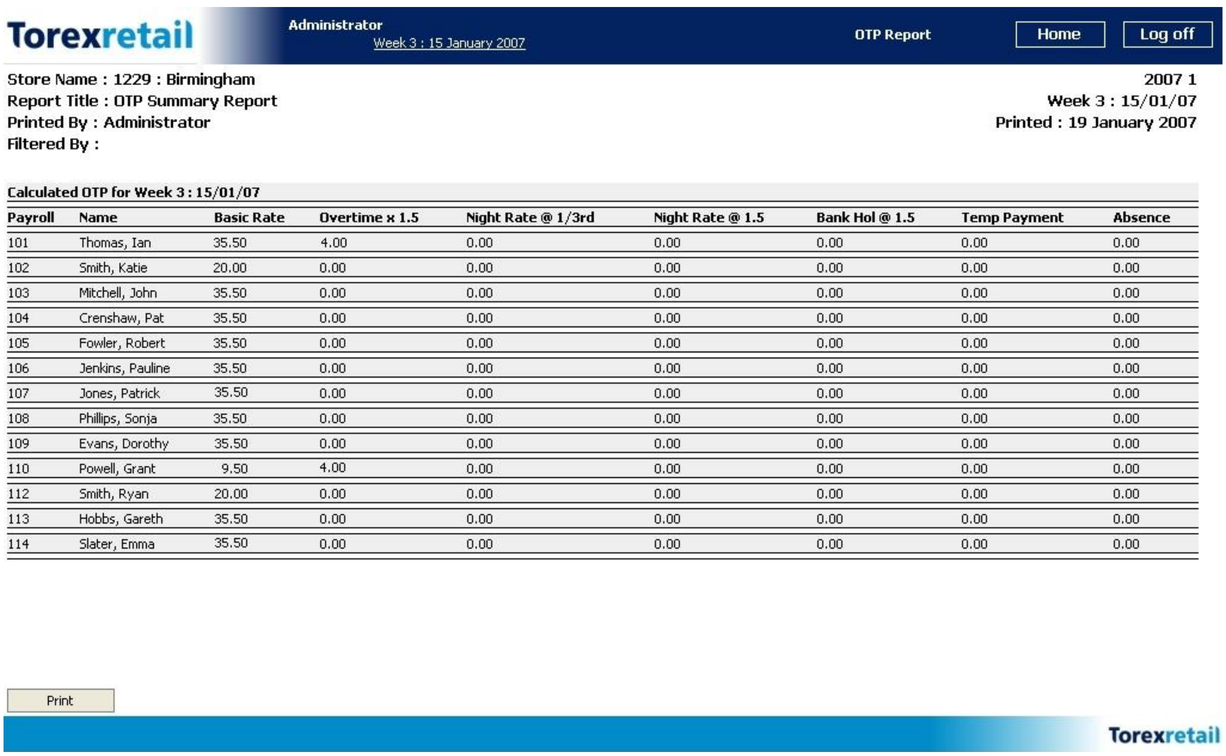
1. To view the Output to Payroll module, click 

.

OTP Report

1. To view the OTP report, click 

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



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

Report window

3. The report shows the rates that employees have been paid, for the past week.

Print

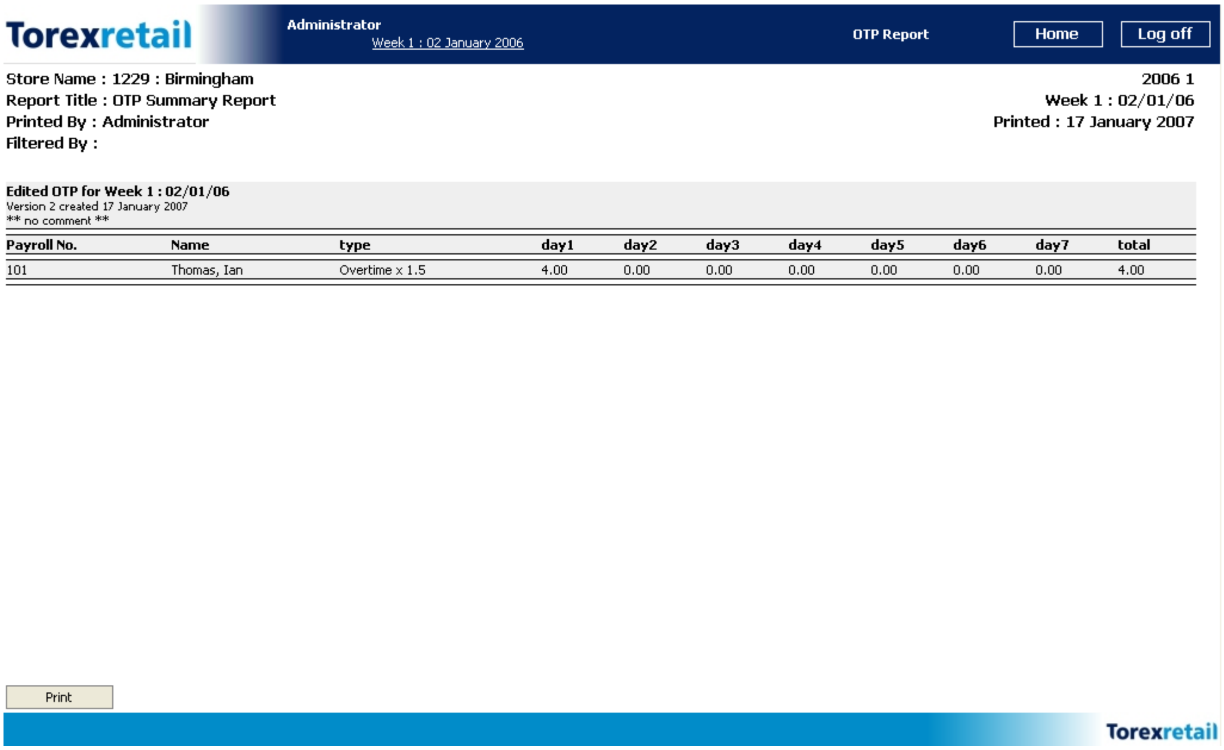
1. Clicking **Print**, will open a standard print dialog box.
2. Select the relevant printer and click **OK**.
3. The report will be printed.

Corrections Report

1. To view the Corrections Report, click


.

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



Report window

3. The report shows any changes which have been made to employees OTP details, for that week.

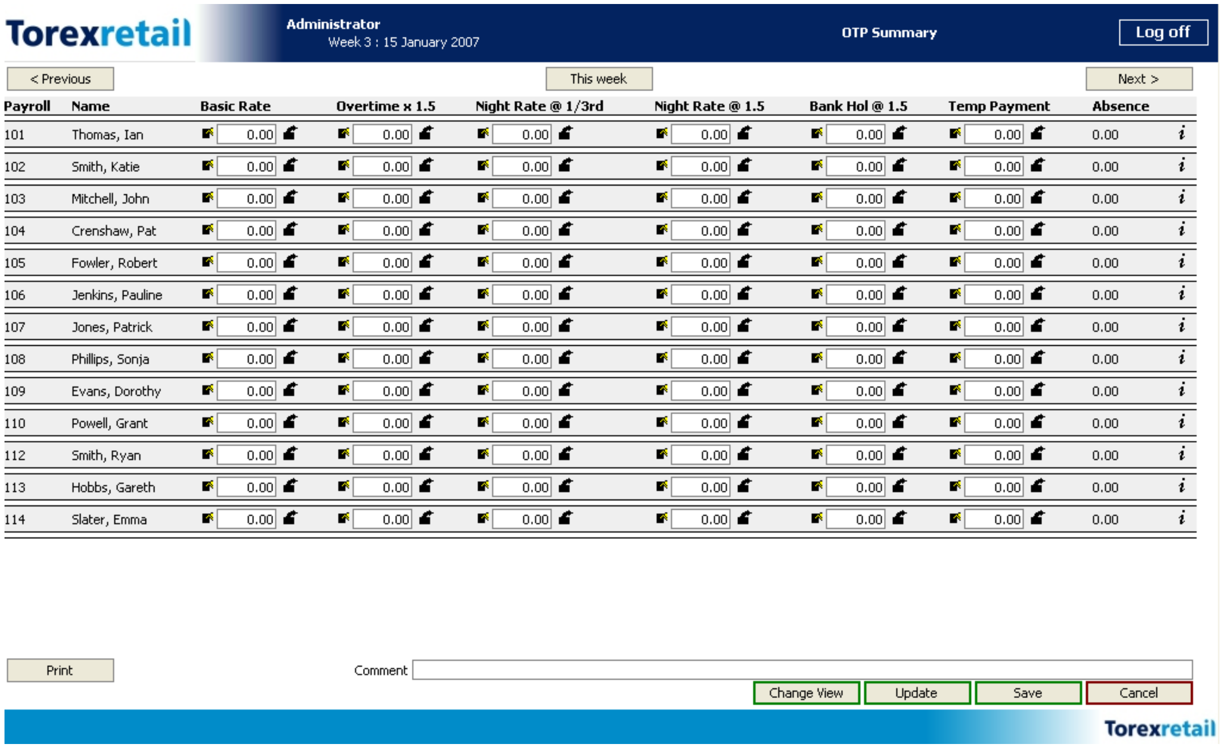
Print

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:



Report window

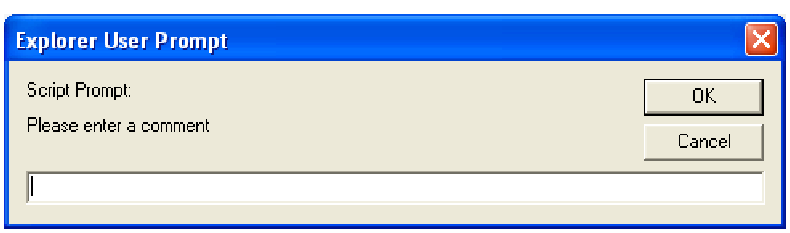
3. You are able to type the hours staff have worked, directly into the relevant field.

More Info Icon

1. Clicking *i* 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:



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

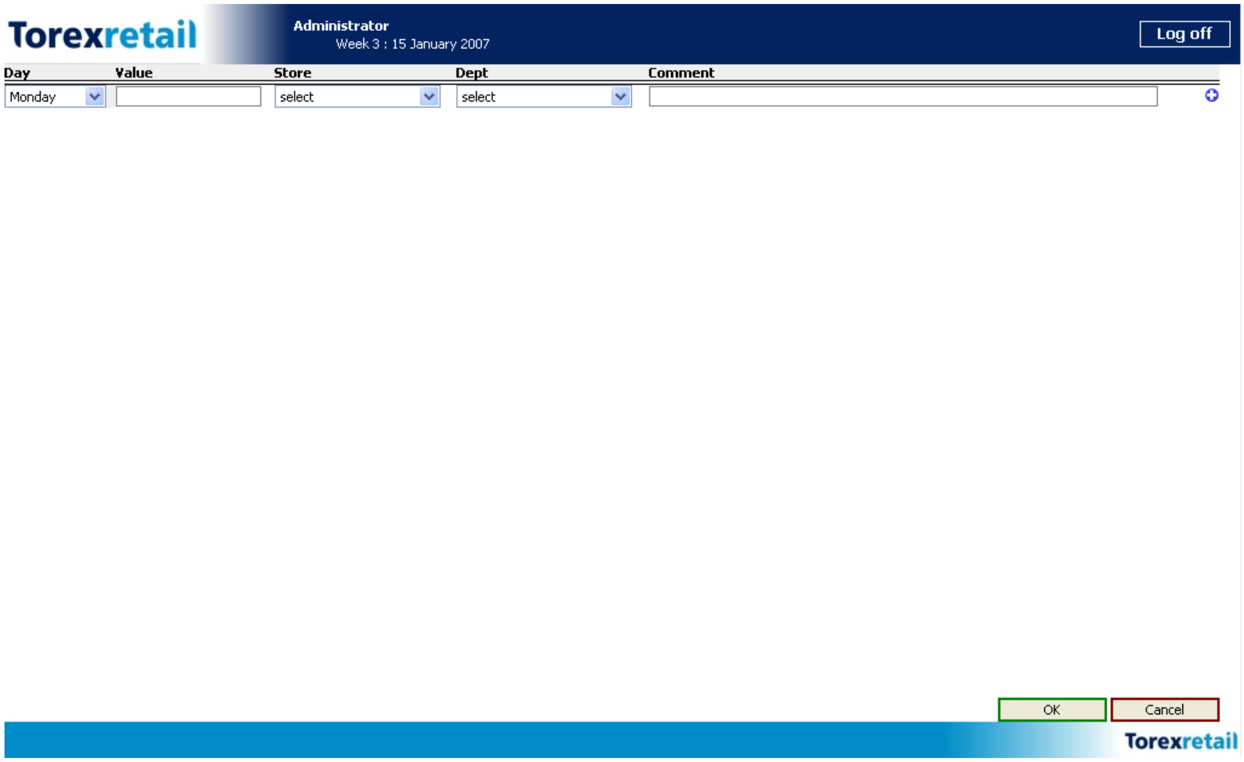
1. Clicking **Commit** will send the data to your 3rd party payroll system and close down the screen.
2. When re-entering the screen, the button will change to **Re-commit**. Clicking this will apply any changes made and re-submit the information to your 3rd party payroll system.

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:



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.

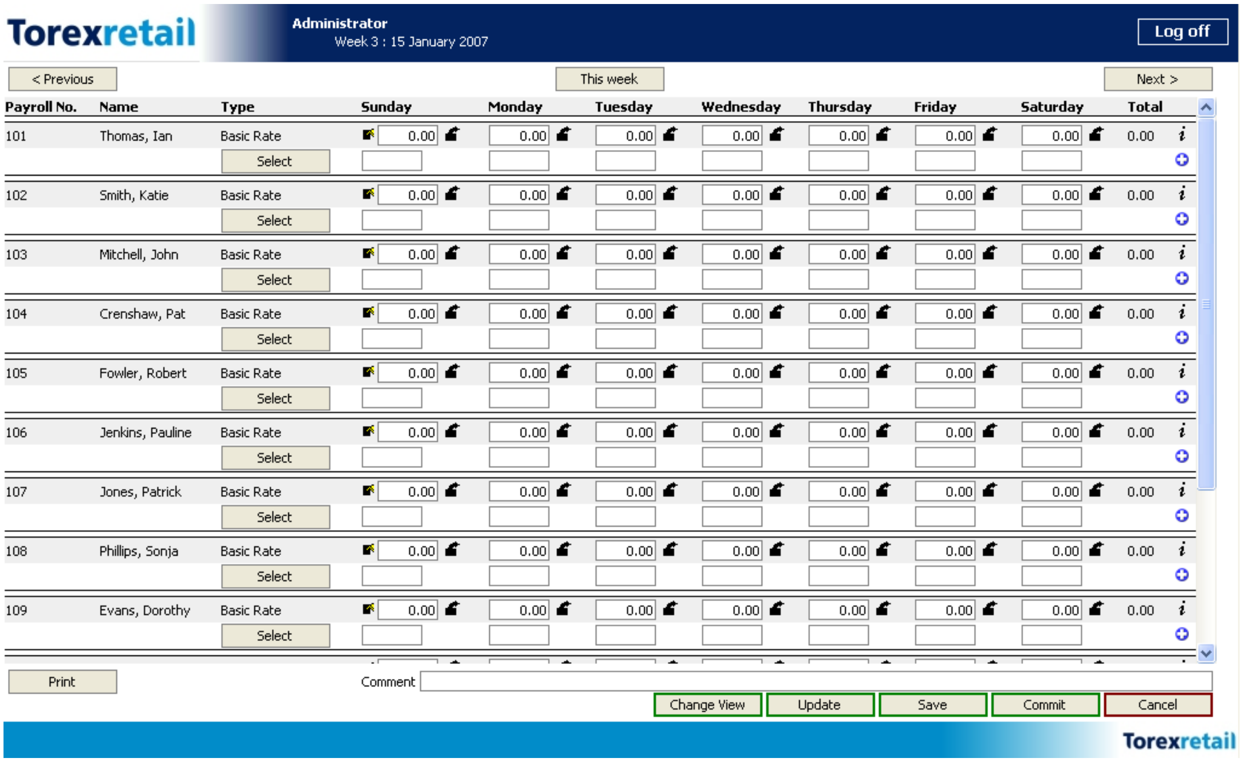
Print

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:



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.

Select Band window

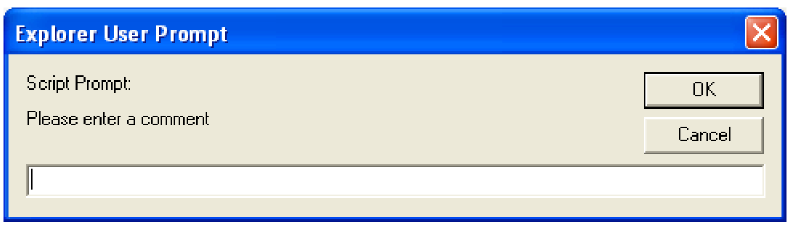
6. Tick the relevant pay band and click **OK** to save your choice and return to the previous screen or **Cancel** to disregard.
7. Enter the applicable value, under the appropriate day.
8. If you have more than 1 pay band to add, click . Another line will be displayed.
9. If you have added a pay band 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

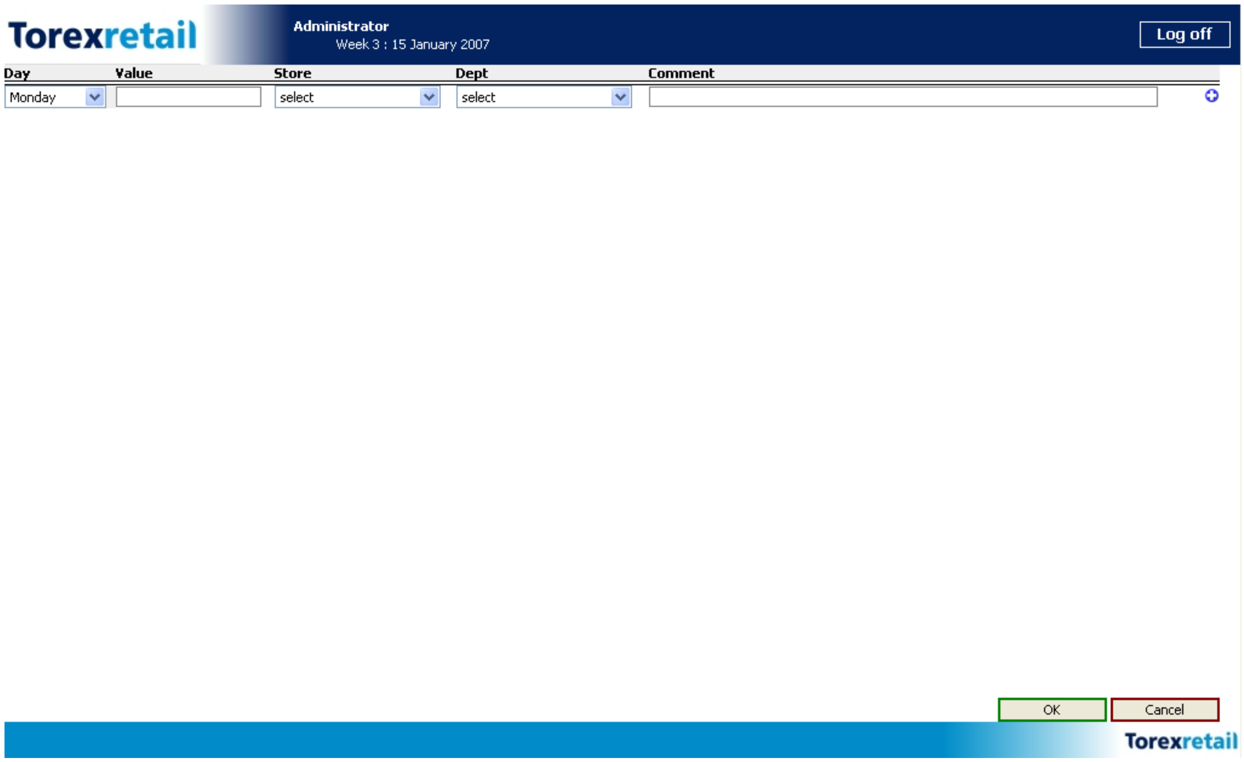
1. Clicking **Commit** will send the data to your 3rd party payroll system and close down the screen.
2. When re-entering the screen, the button will change to **Re-commit**. Clicking this will apply any changes made and re-submit the information to your 3rd party payroll system.

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:



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.

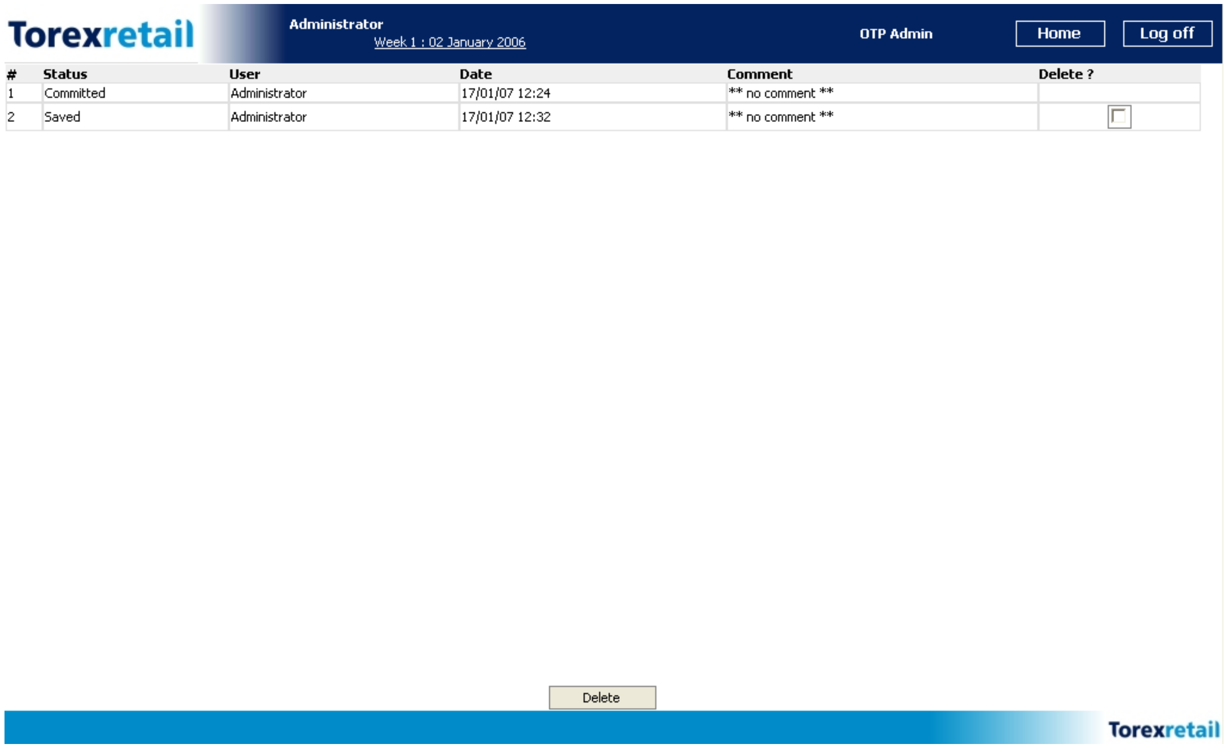
Print

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:



OTP Admin window

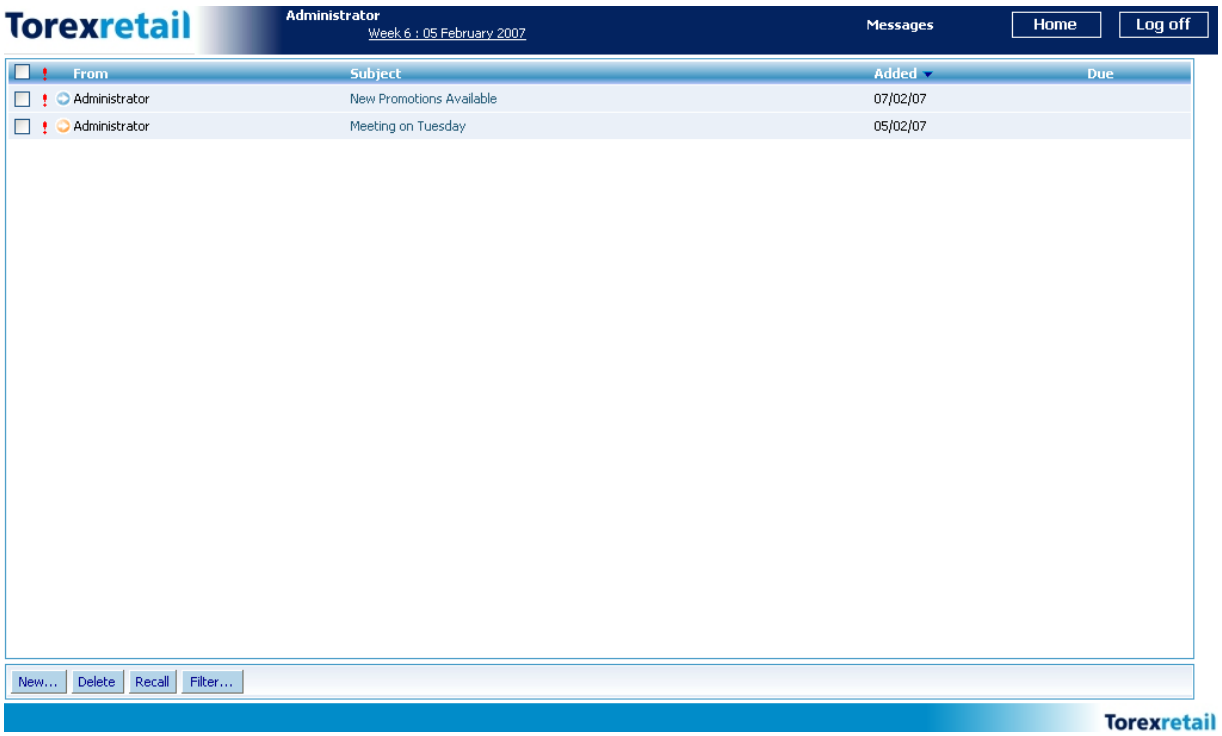
3. This screen shows any changes which have been made to the OTP section of the system and allows you to undo any changes.
4. Click in the **Delete?** tick box, next to the relevant option you want to undo
5. Click **Delete**.

> **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**.

11

Enterprise Messages

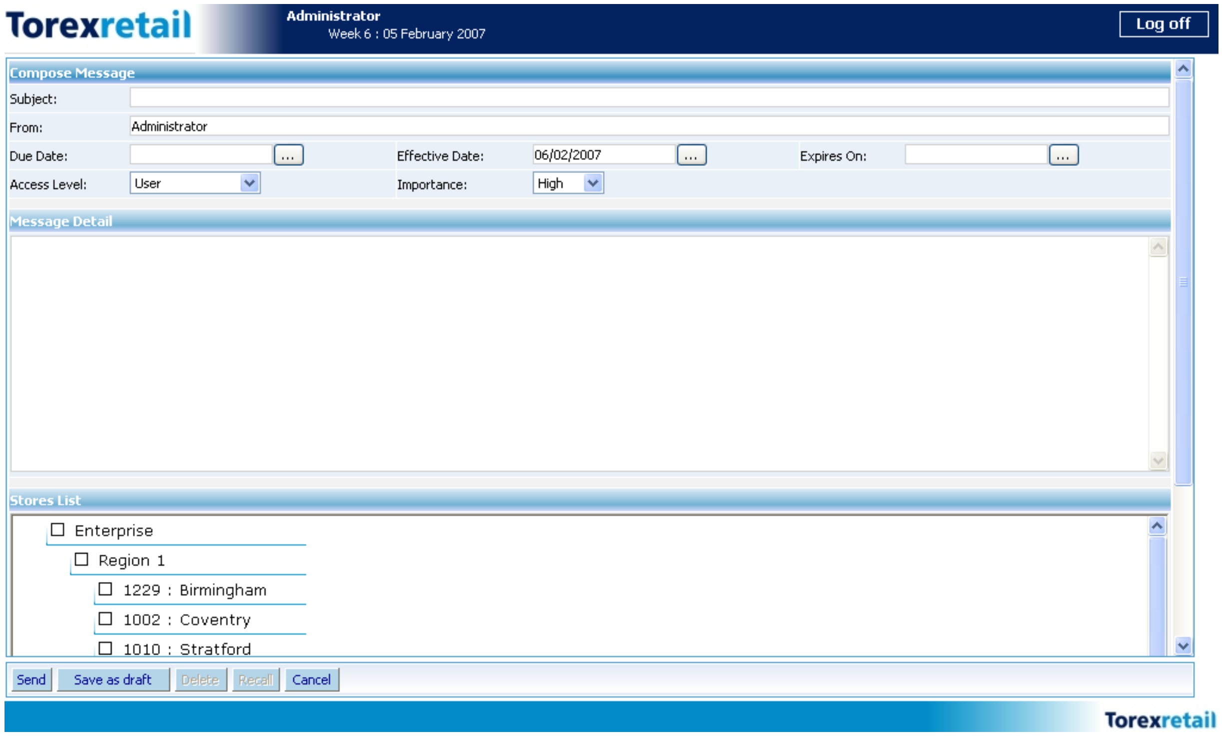
1. To send messages to another store, click 
.
2. A screen, similar to that below will be displayed:



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 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.

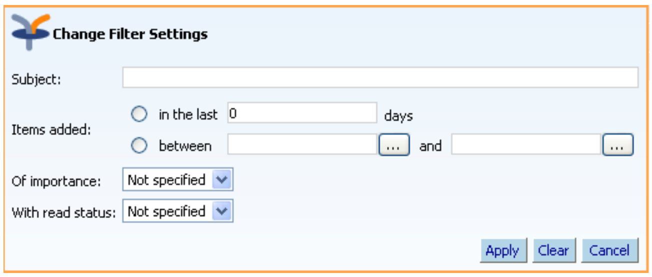
Recall a Message

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

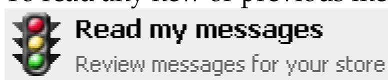
3. The components of the screen are described below:

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.

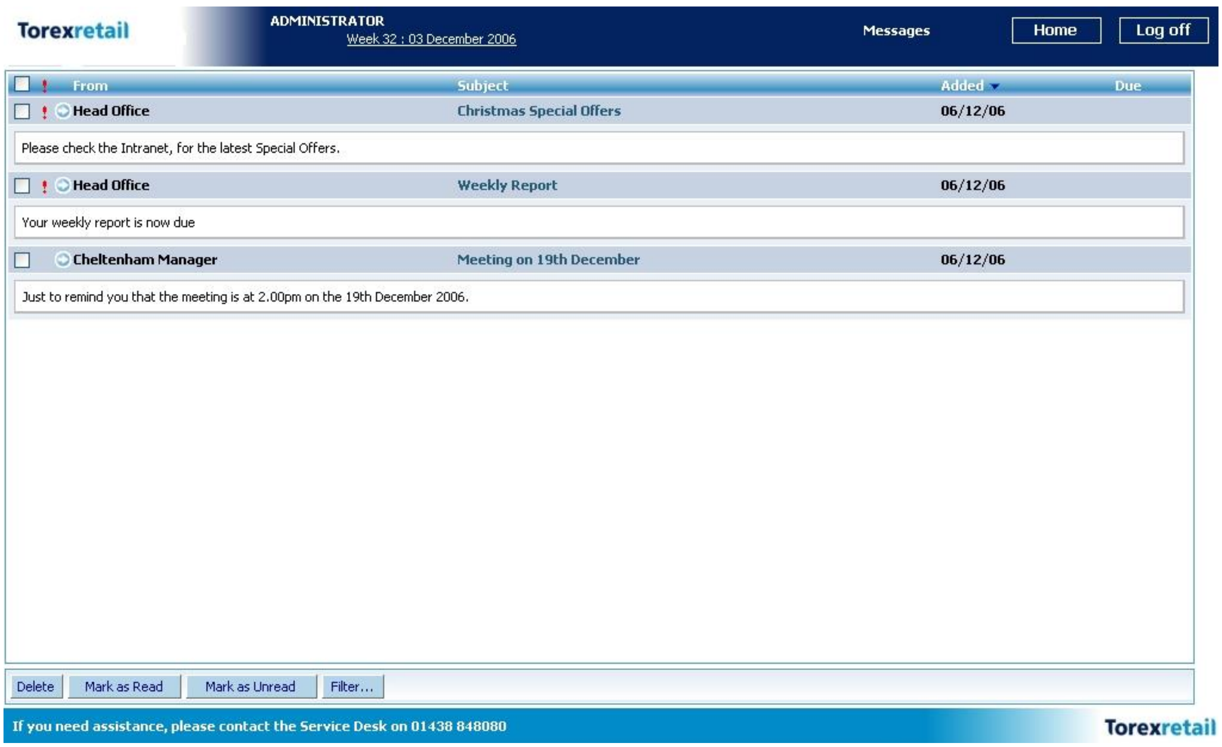
4. Any, or a combination, of the options above can be selected.
5. When ready, click **Apply**.

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

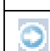
1. To read any new or previous messages, which have been sent to you, click 

.
2. A list of received, read and unread, messages will be displayed.



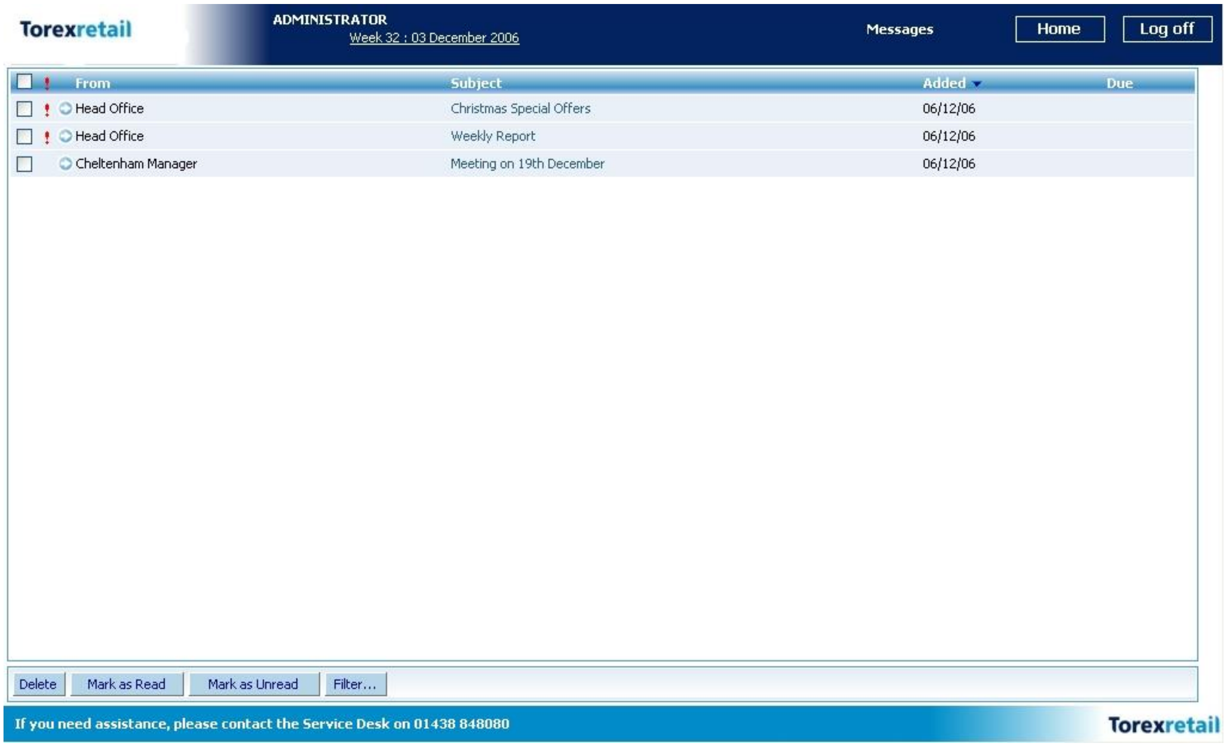
Messages window

3. Each message can have a series of icons to the left of the sender's name. An explanation of each icon is below:

	**Recall** Indicates that this message has been recalled.
	**High Importance** Shows that the message has been sent with a High Importance.
	**Normal Status** This icon indicates it is a standard message.
	**Low Importance** 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).

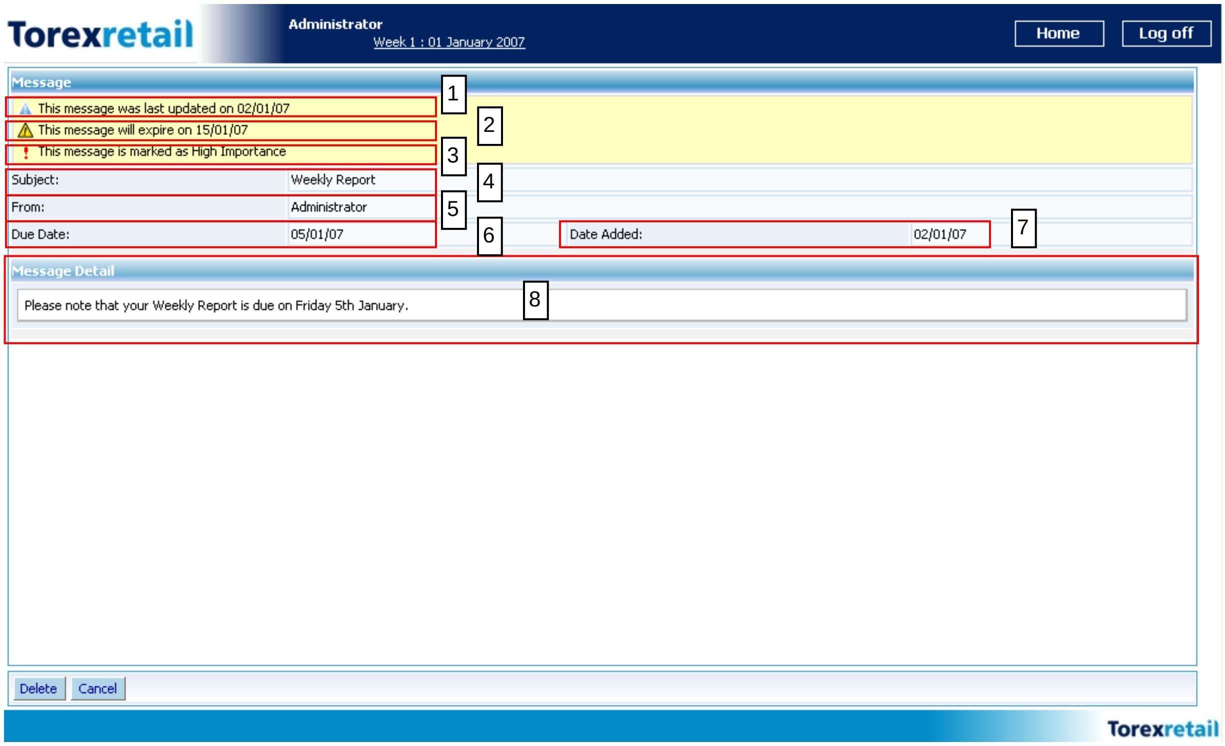
5. When a message is read, the text will be hidden and the summary information will no longer be displayed in bold (as can be seen in the screen below).
6. The message can be re-read by clicking subject. This acts a link to the whole message.



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**.

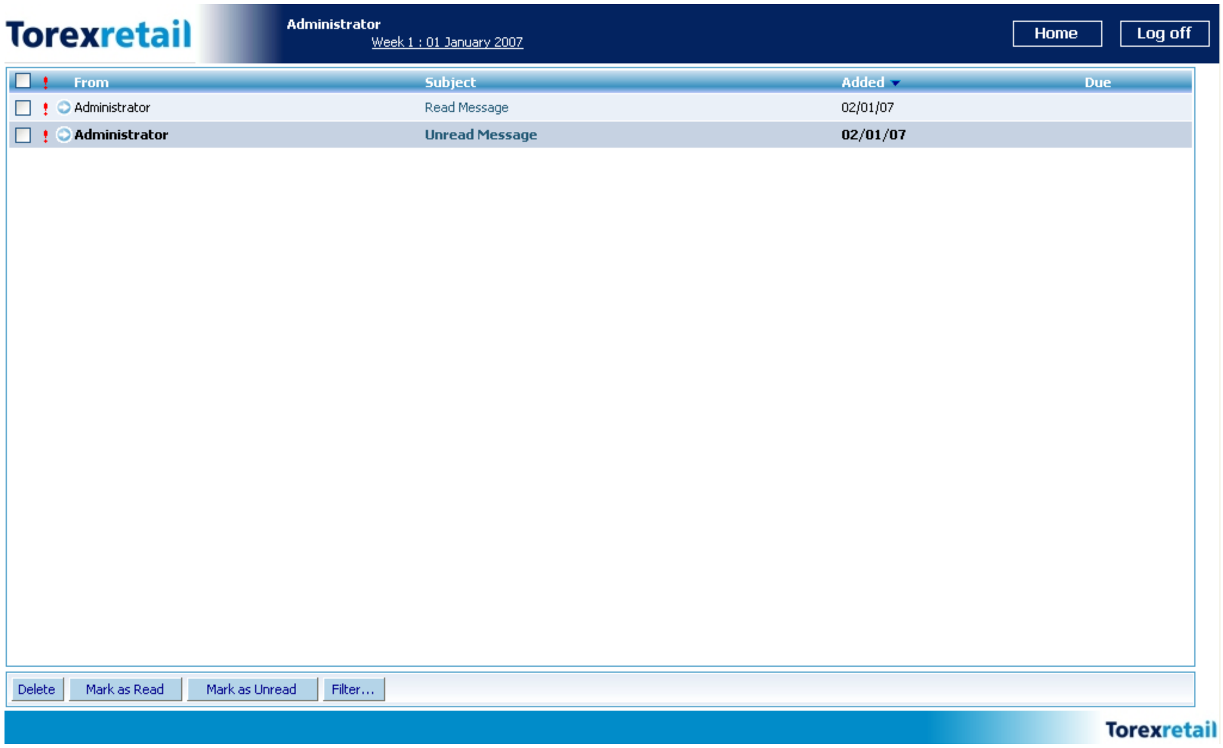
Reading the Message

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.

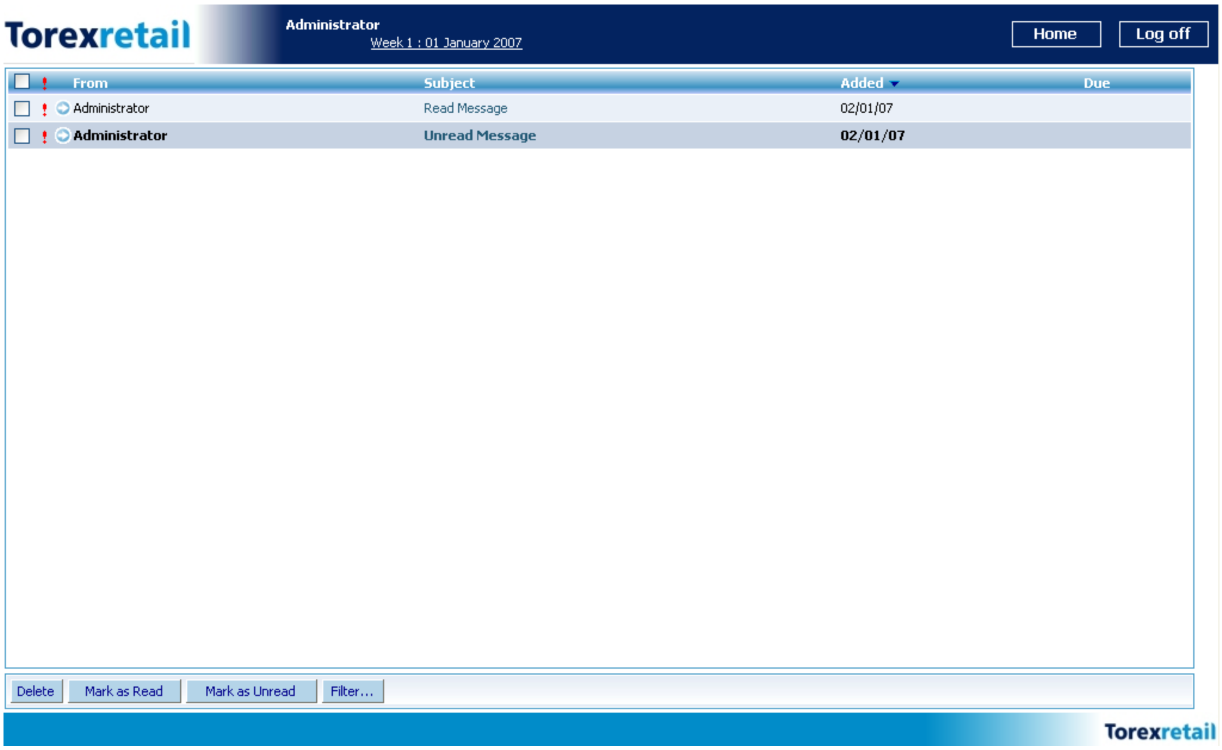
Reading the Message

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:



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.

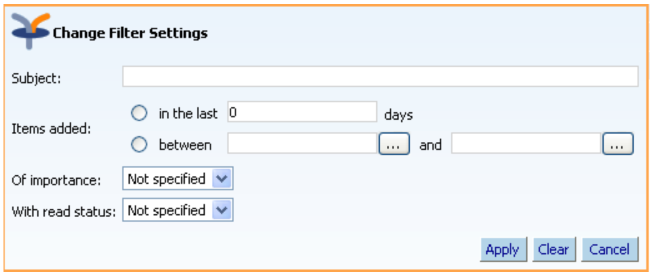
Marking All Messages as Unread

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**.

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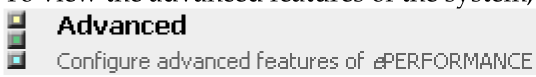
Advanced

1. To view the advanced features of the system, click 

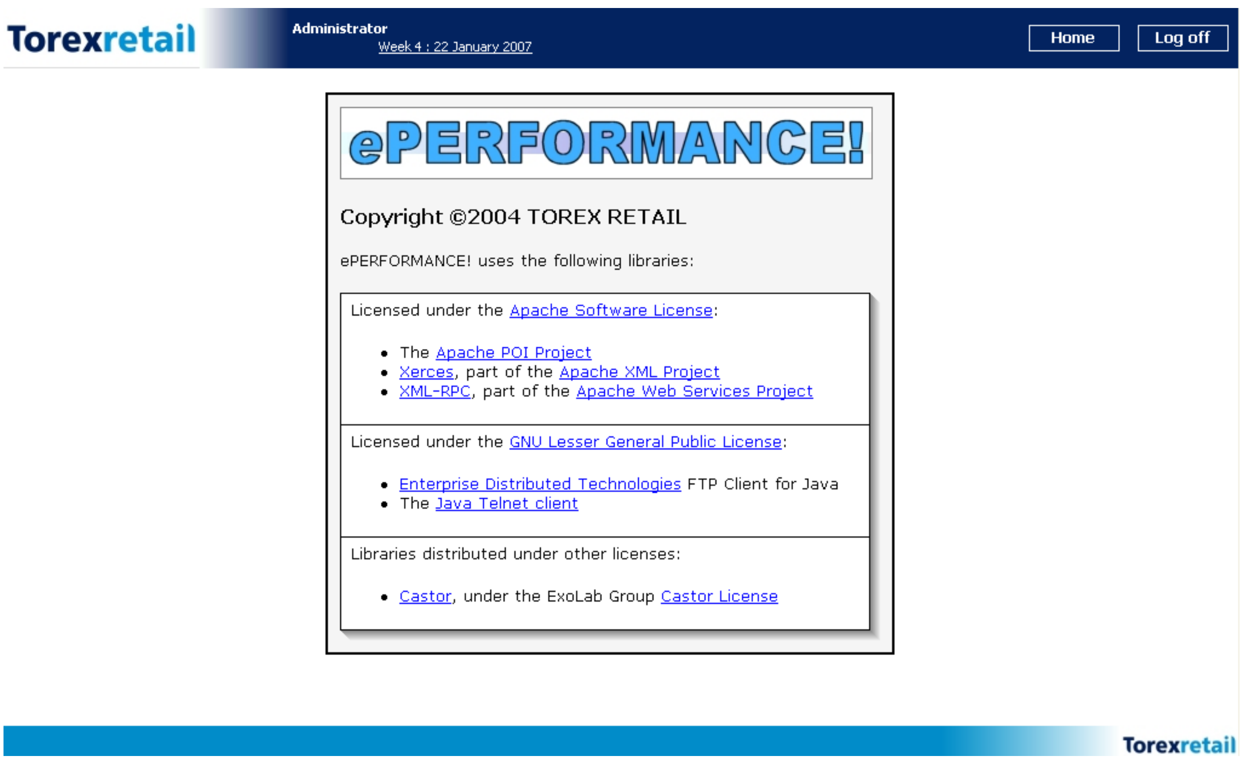
.

About ePerformance

1. To view licensing information for the system, click 

.

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



About window

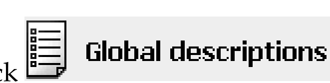
3. Click links to view the relevant information.

Table Editors

1. To view the table editors, click 

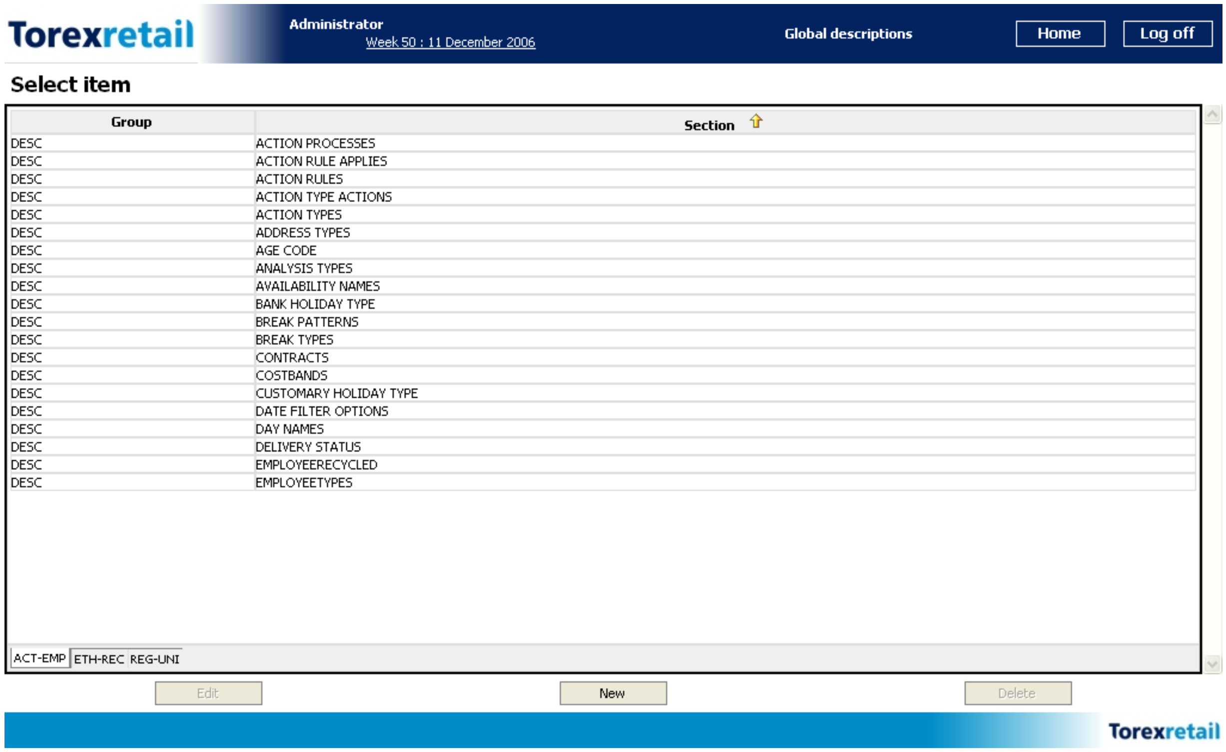
.

Global Descriptions

1. To view the global descriptions, click 

.

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



Select Item 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

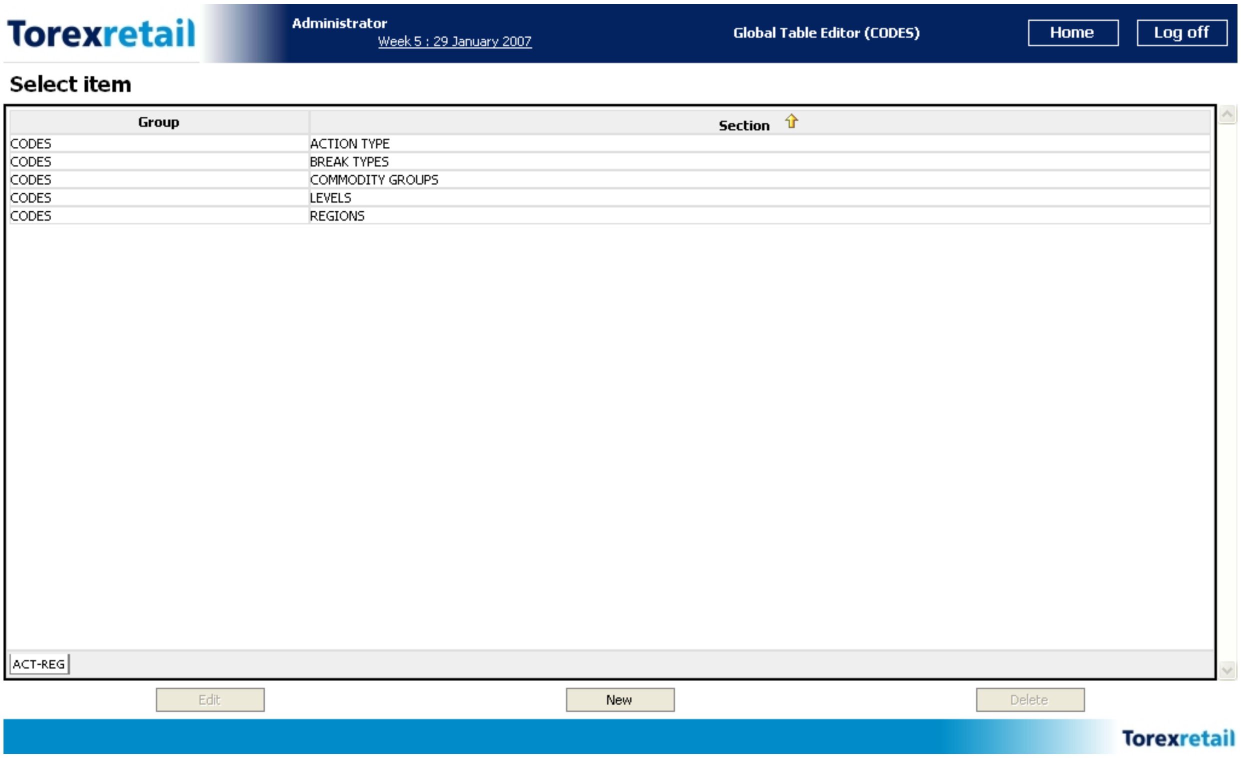
1. To delete a global description, click on its name in the list and click **Delete**.

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 

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



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.

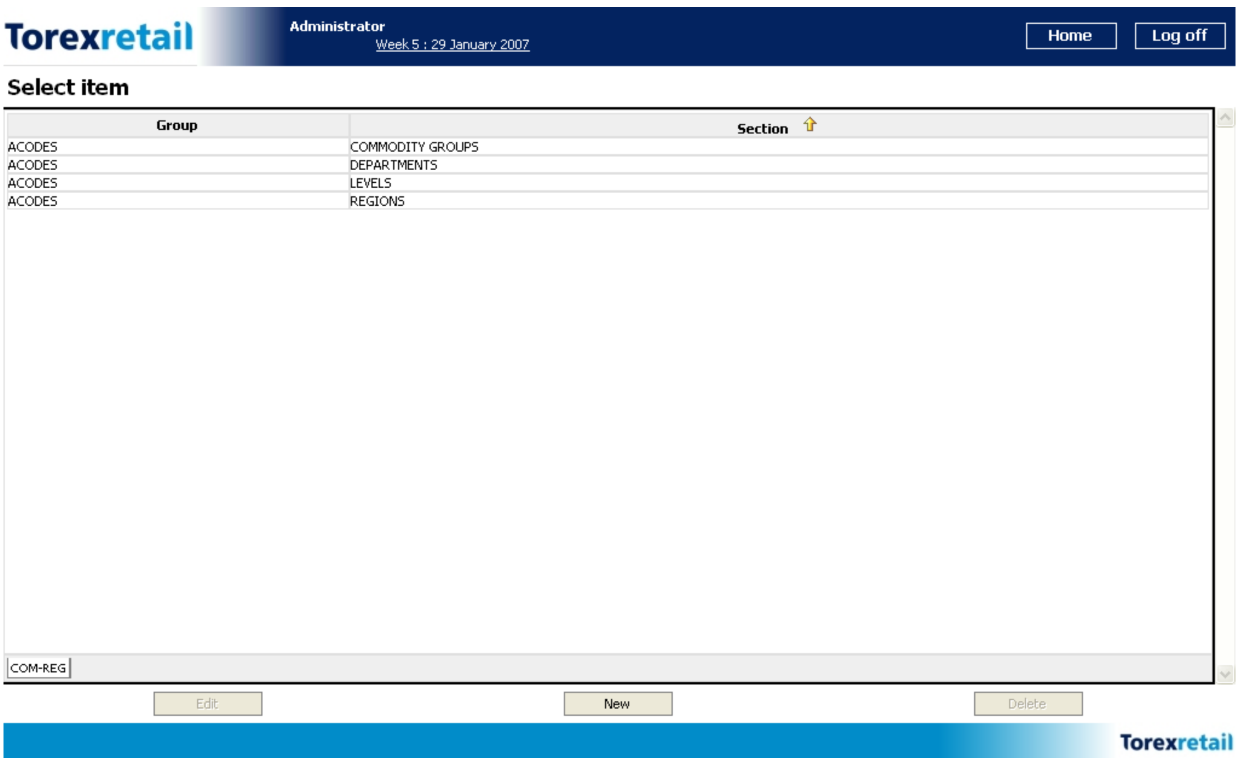
Delete a Global Description

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 

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



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.

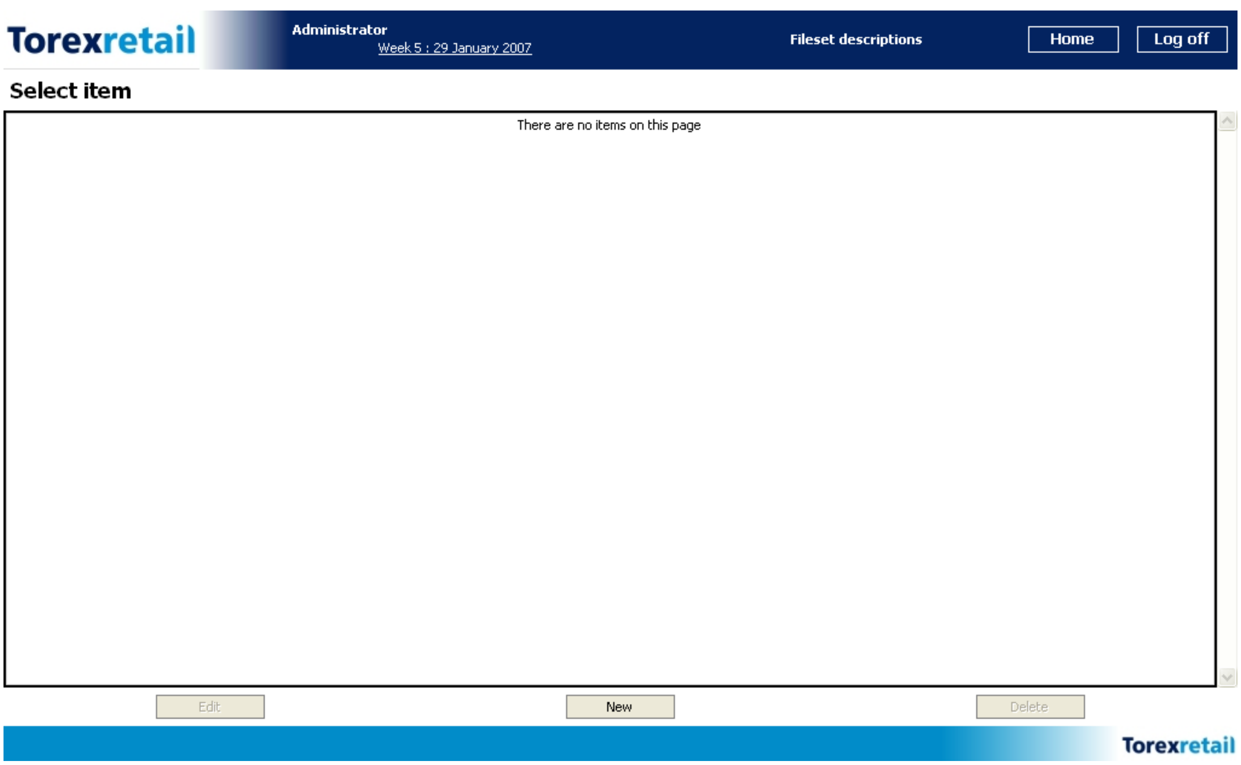
Delete a Global Table

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 

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



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.

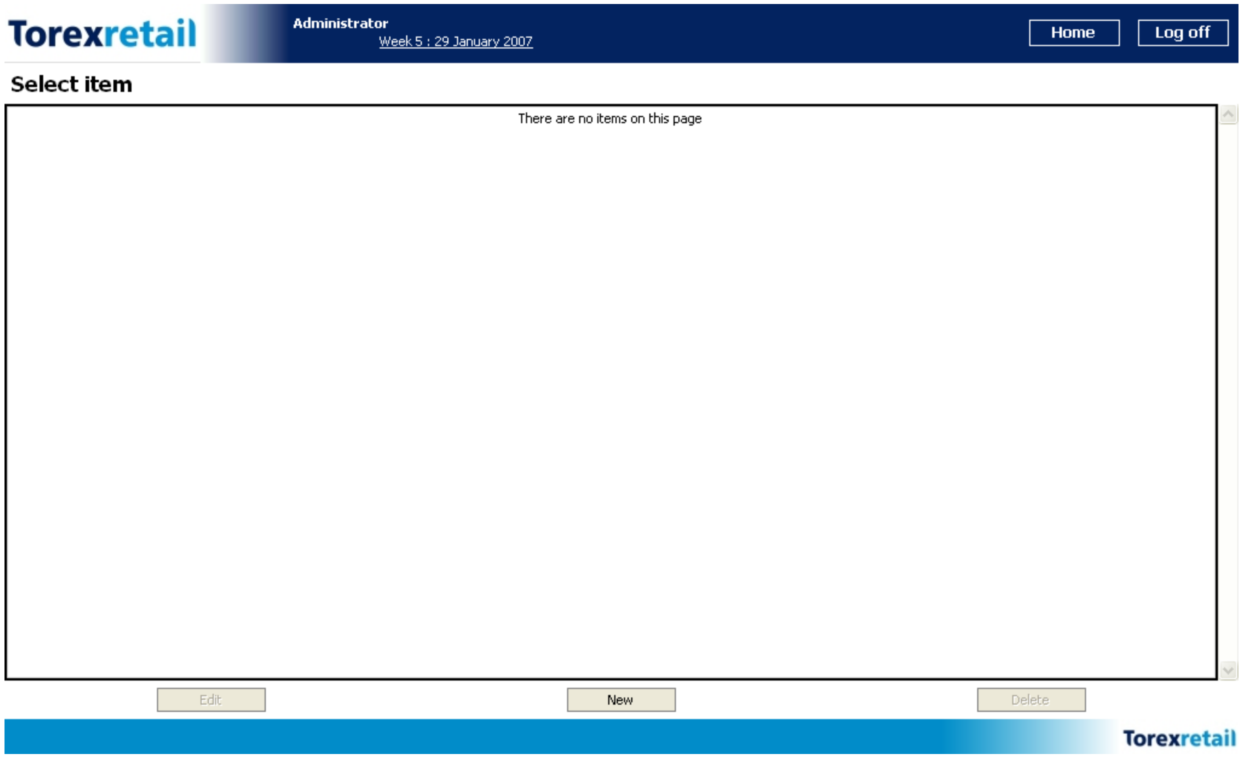
Delete a Fileset Description

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

1. To view the fileset codes, click 

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



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

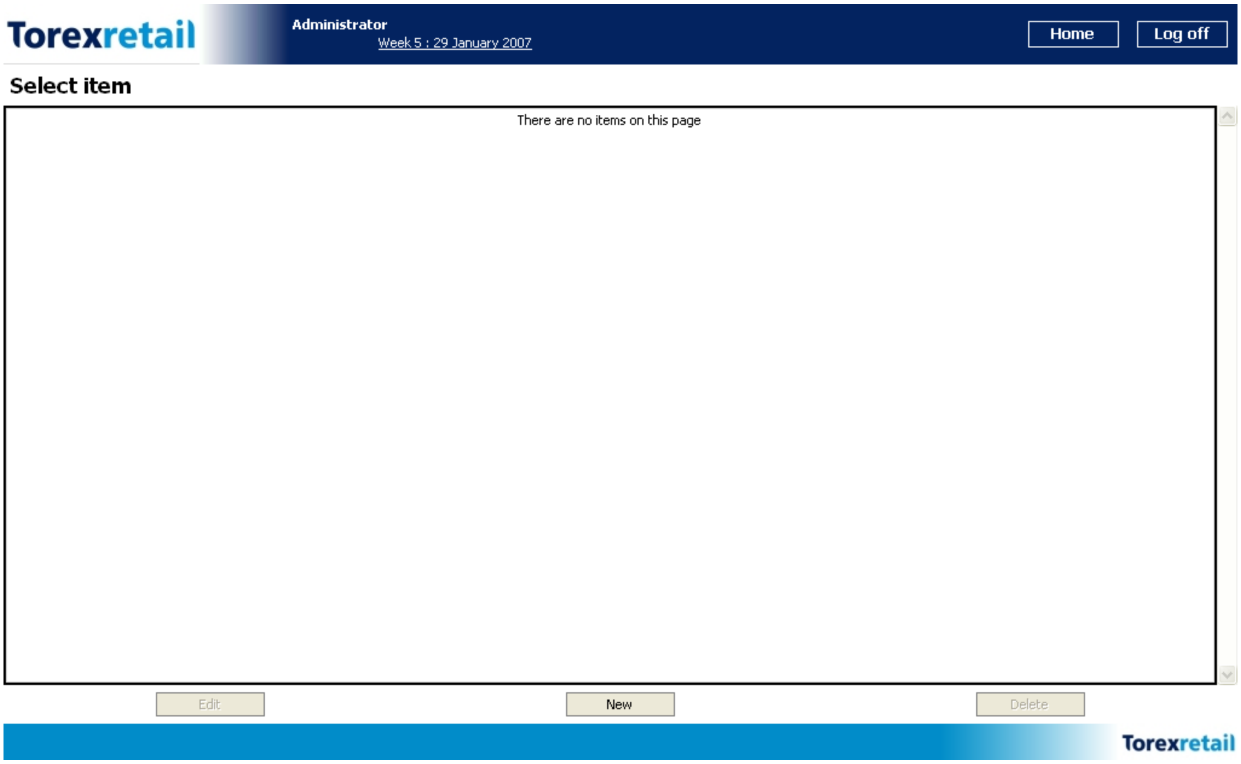
1. To delete a fileset code, click on its name in the list and click **Delete**.

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 

.
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

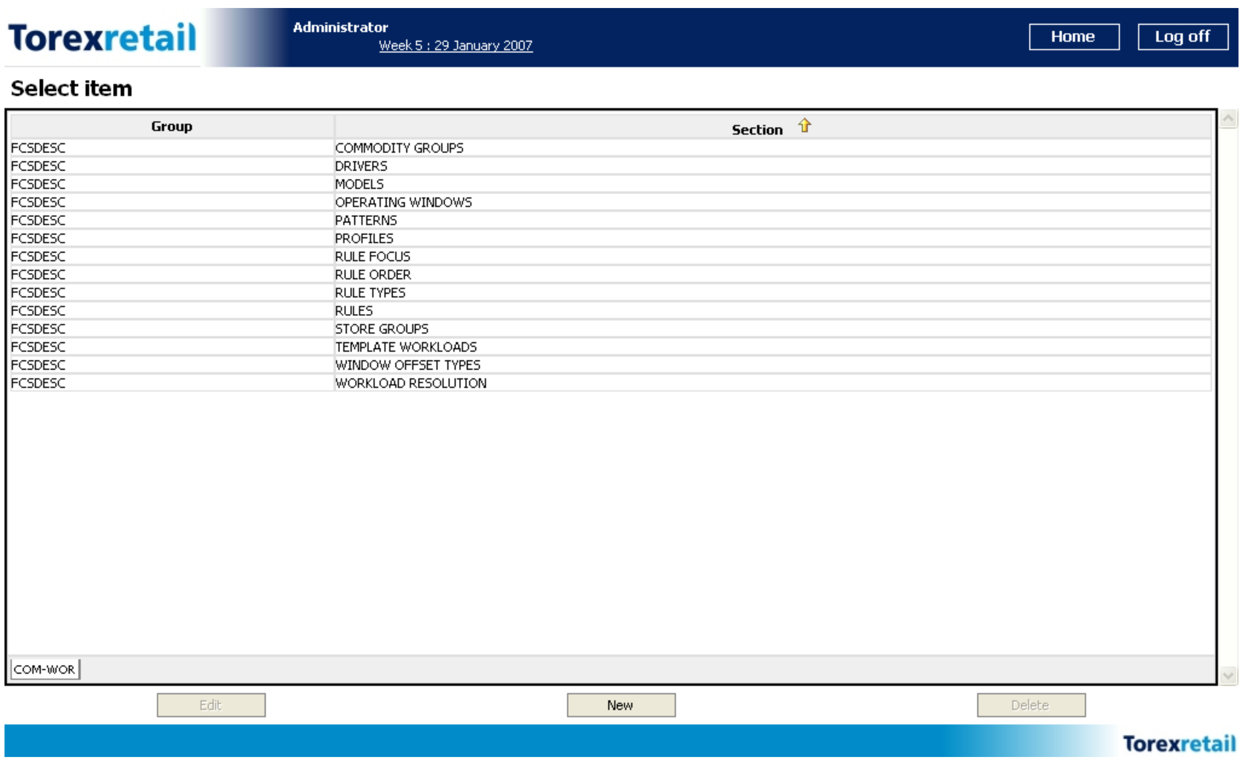
1. To delete a group description, click on its name in the list and click **Delete**.
2. You will be asked **Are you sure you want to delete this item?** Click on **Yes** to confirm or **No** to disregard.

Global Forecast Descriptions

1. To view the global forecast description screen, click

.

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



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.

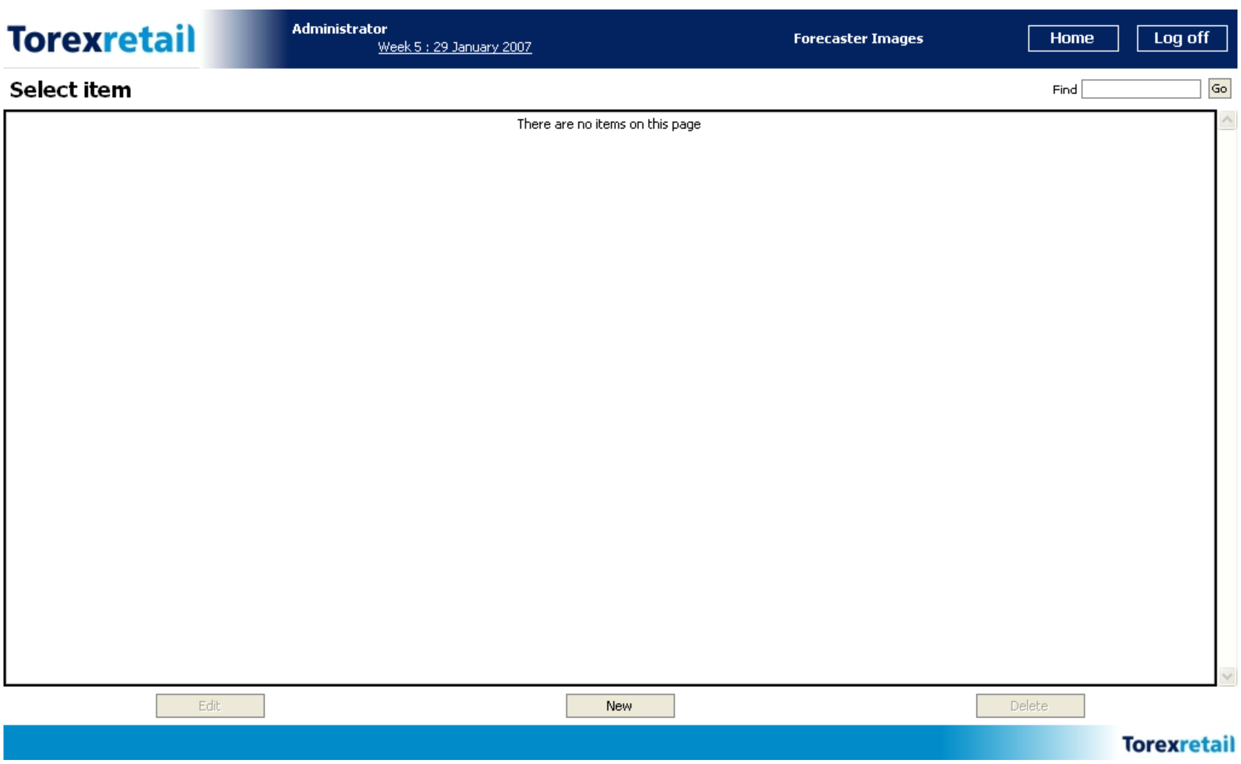
Delete a Global Forecast Description

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 

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



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.

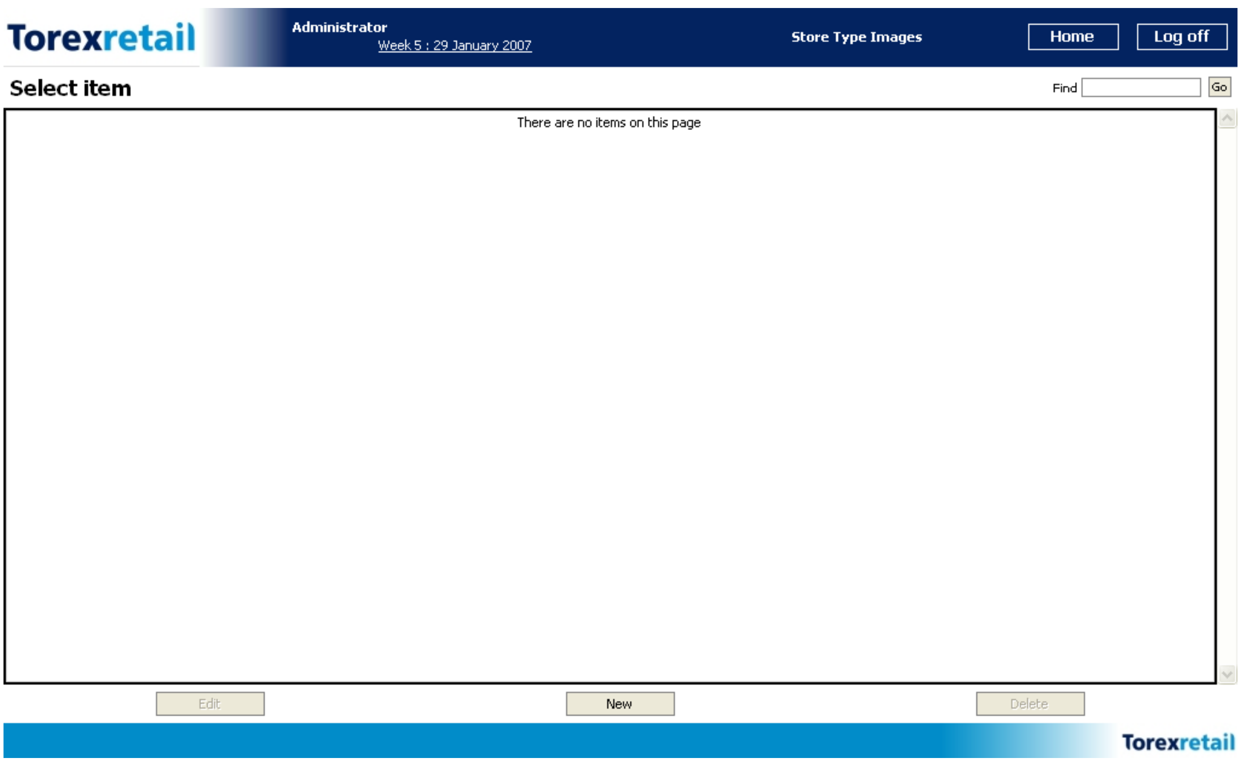
Delete a Forecaster Image

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 

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



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 

.
2. Further information on this screen can be found on page 124.

Generic Configuration Editors

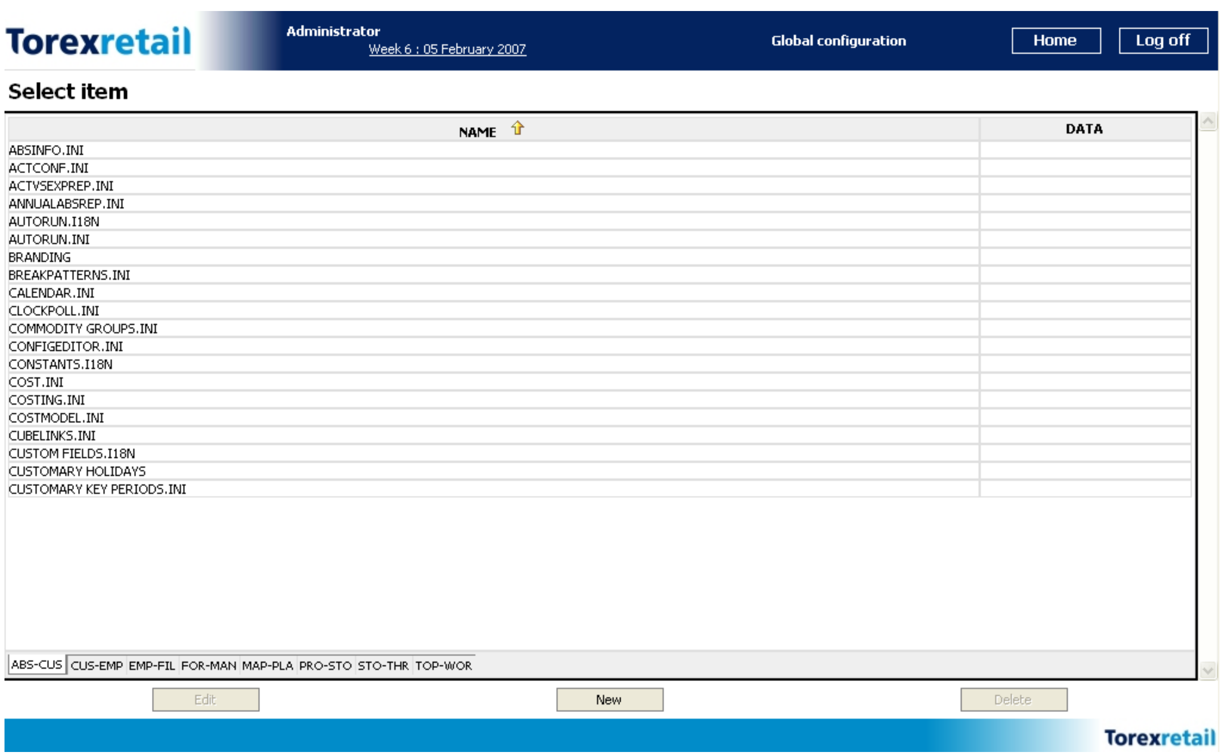
1. To view the generic configuration editors, click 

.

Global Configuration

1. To view the Global Configuration screen, click 

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



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.

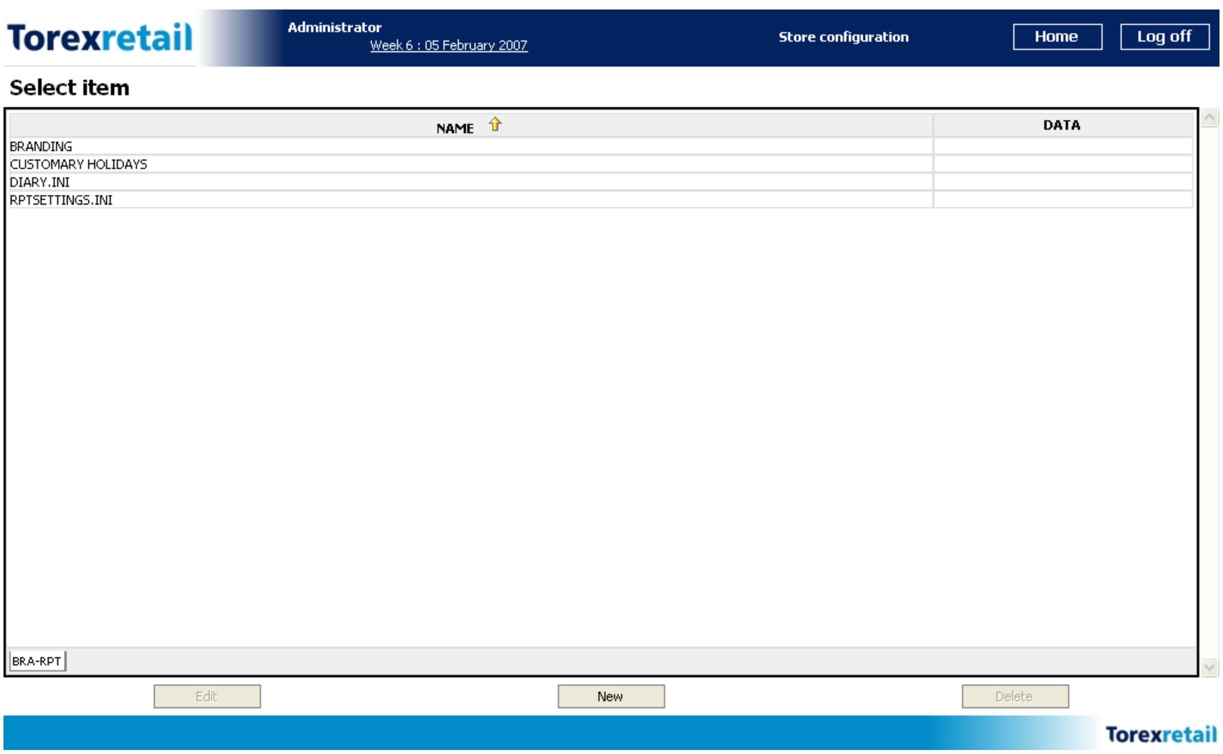
Delete a Global Configuration File

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 

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



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 

.
2. For further information on using this screen, see Page 350.

Tree Editors

1. To view the Tree Editors screen, click 

.

Store Listing

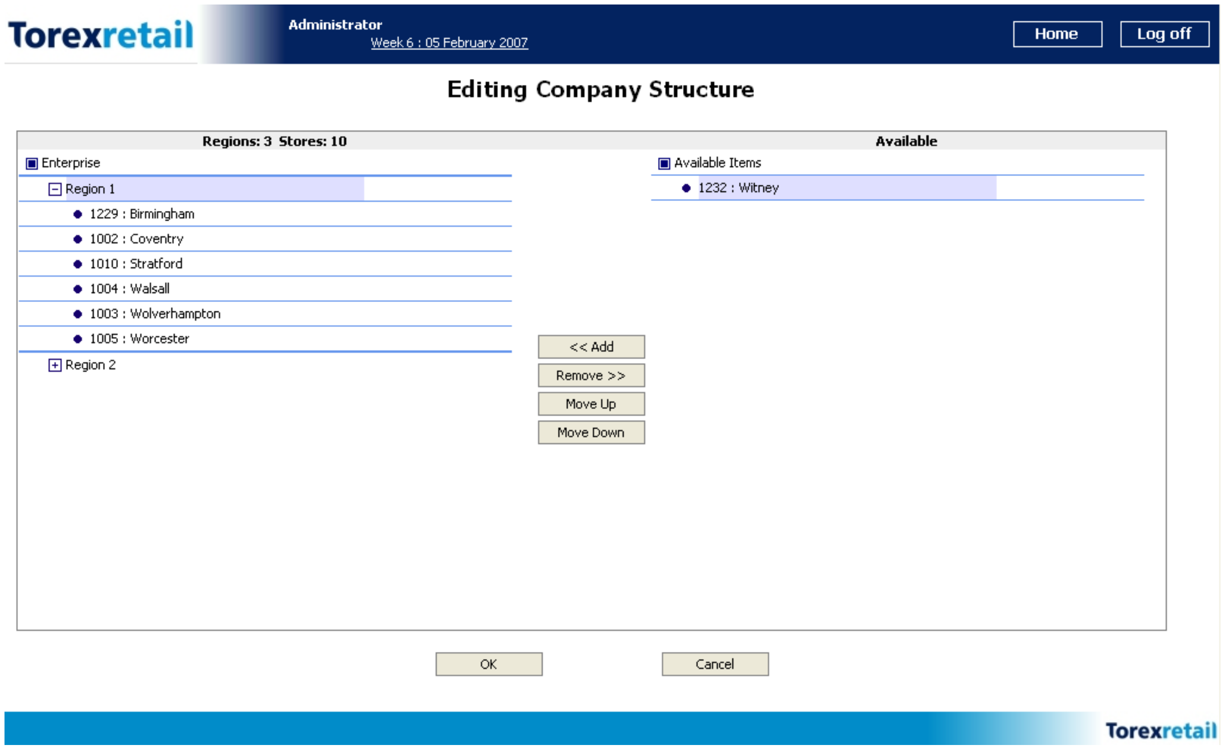
1. To view the Store Listing, click 

.
2. Further information on this screen can be found on page 124.

Regions & Stores

1. To view the Regions & Stores screen, click 

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



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.

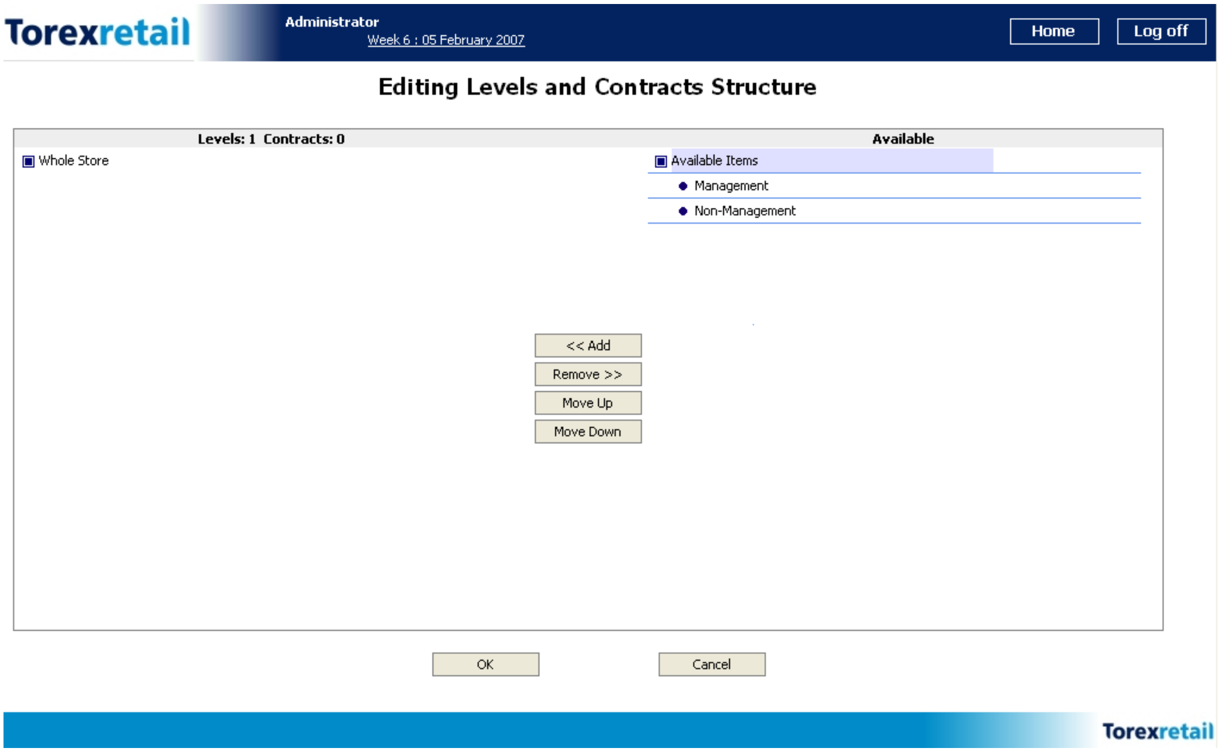
Moving a Store in a Region

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 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**.

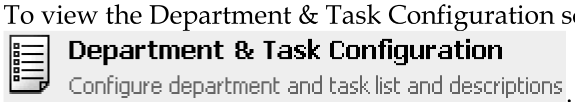
Removing an Item from a Store

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 

.

Store Groups

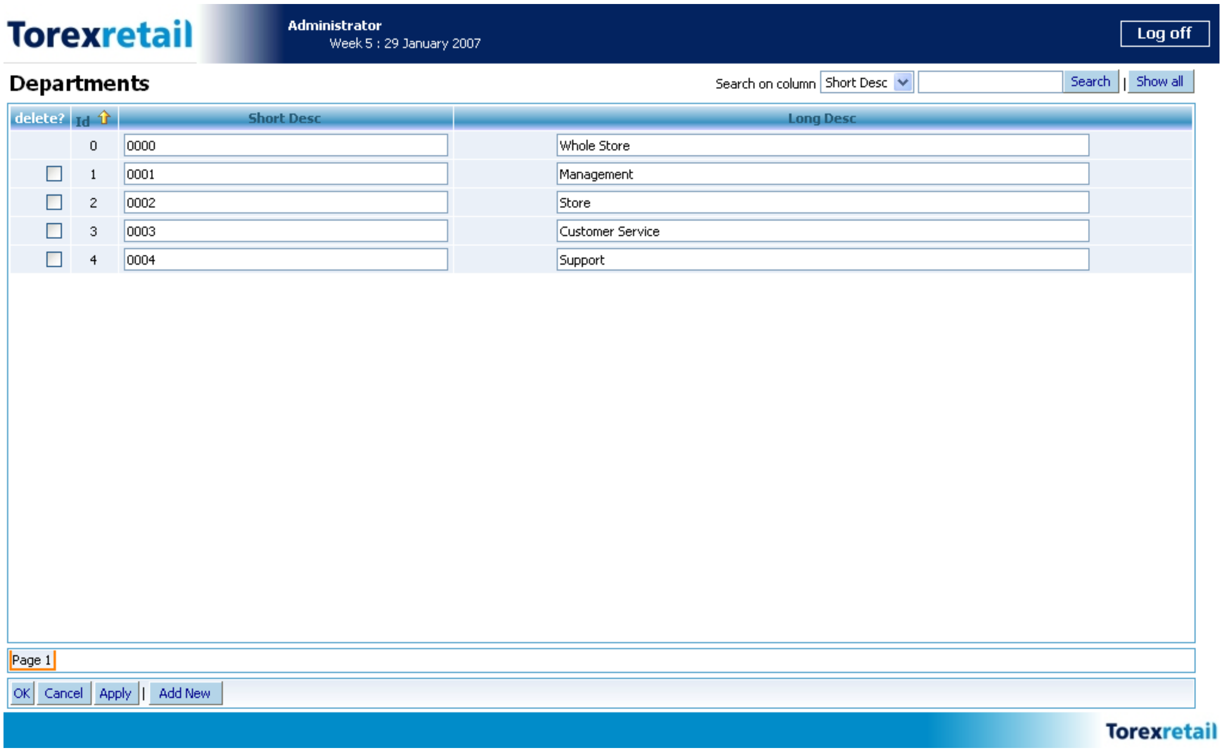
1. To view the Store Groups, click 

.
2. Further information on this screen can be found on page 112.

Department Descriptions

1. To view the Department Descriptions, click 

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



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 window

This **Search** box allows you to search on 3 columns:

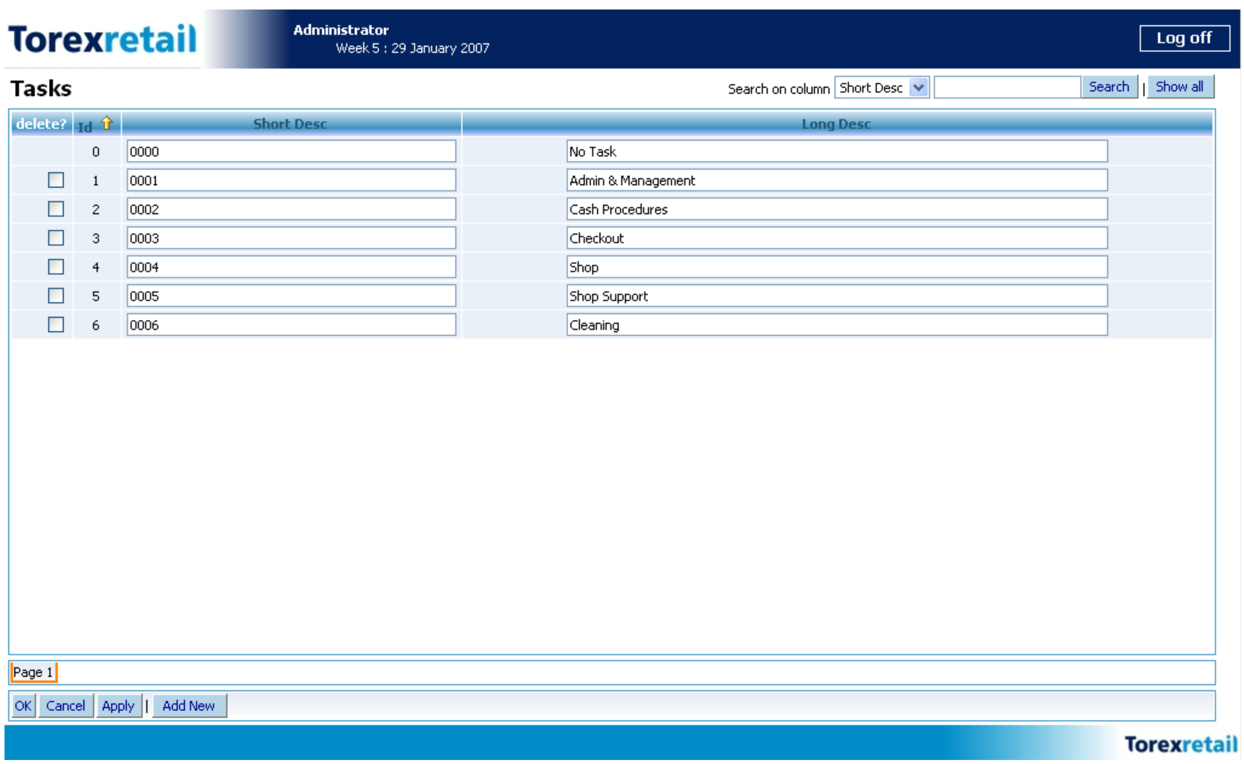
- Short Desc
- ID
- LongDesc

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 

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



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 window

This **Search** box allows you to search on 3 columns:

- Short Desc
- ID
- LongDesc

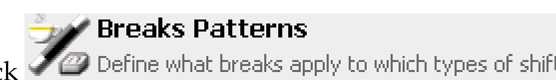
1. Select the appropriate column from the list.
2. Type the relevant word, into the **Search** box.
3. Click **Search**.
4. The results will be displayed in the main screen.
5. Click **Show all** to display all of the parameters again.

Module Configuration Editors

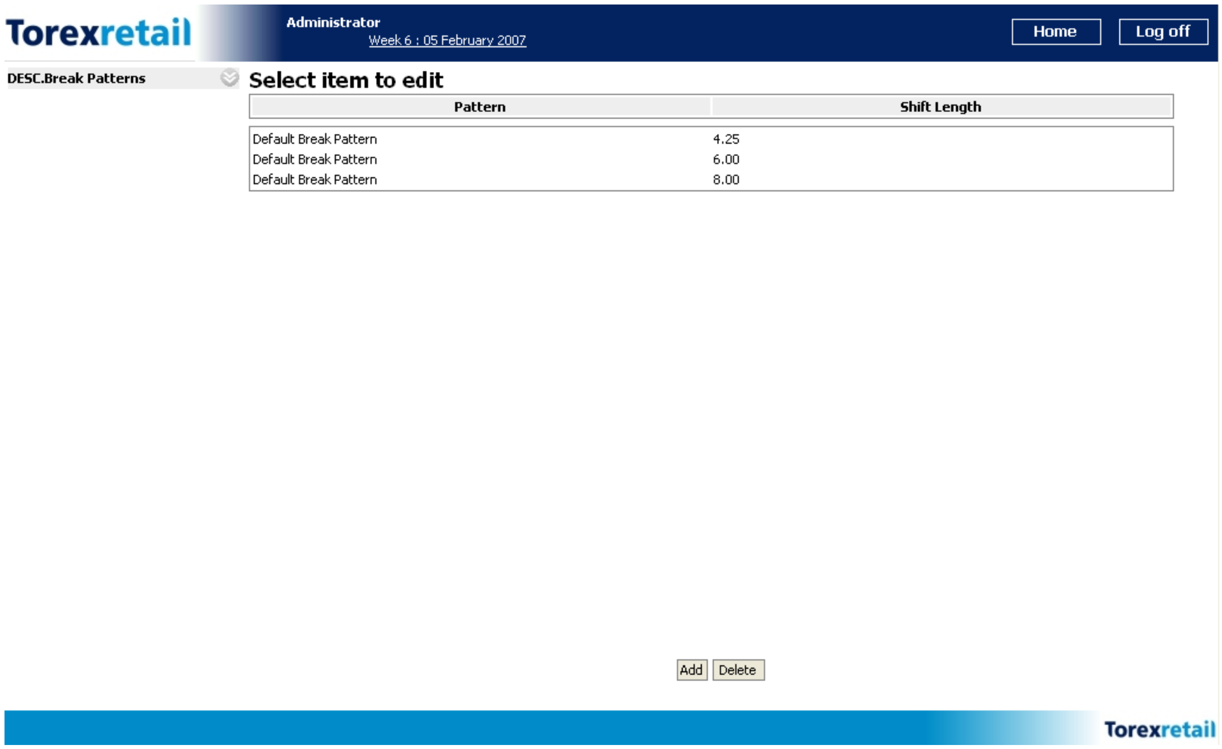
1. To view the Module Configuration Editors, click 

.

Breaks Patterns

1. To view the Break Patterns, click 

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



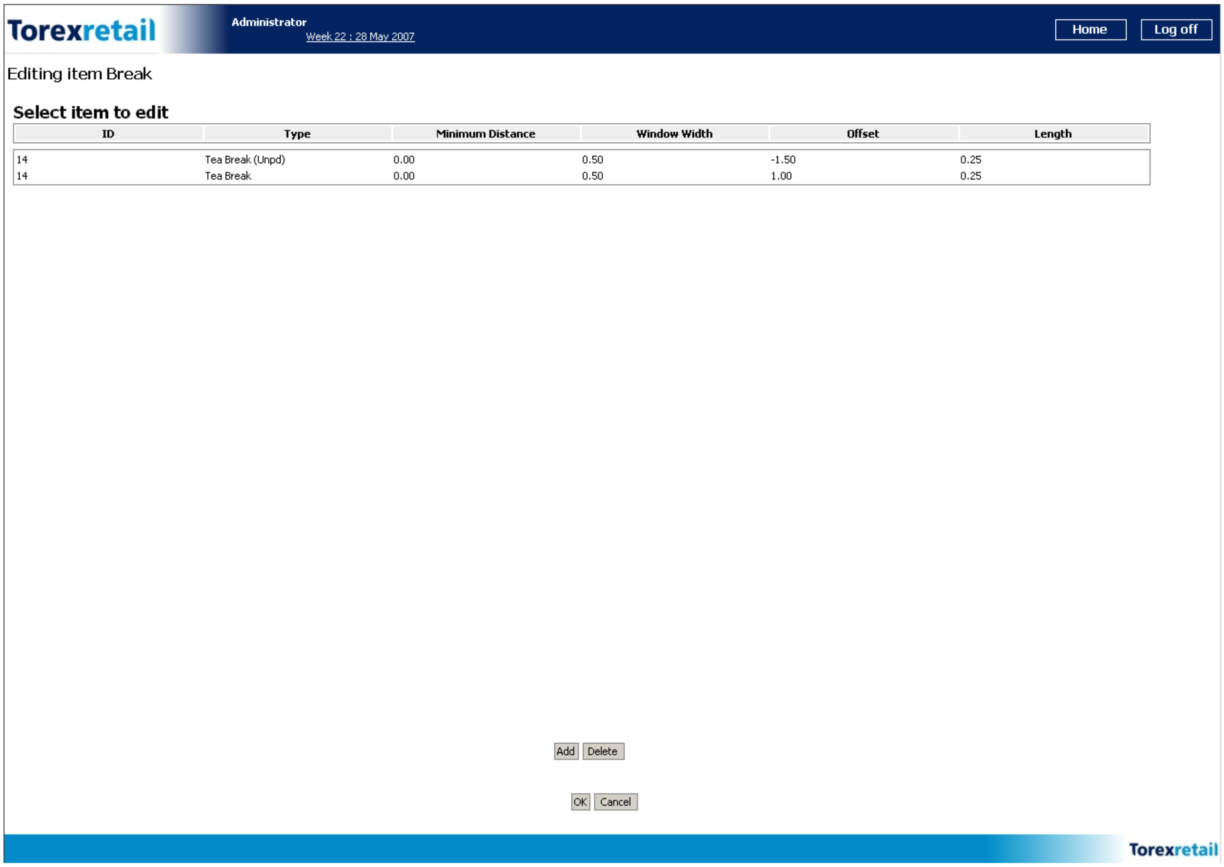
Select Item window

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:



Select Item window

2. 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 window

3. 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.

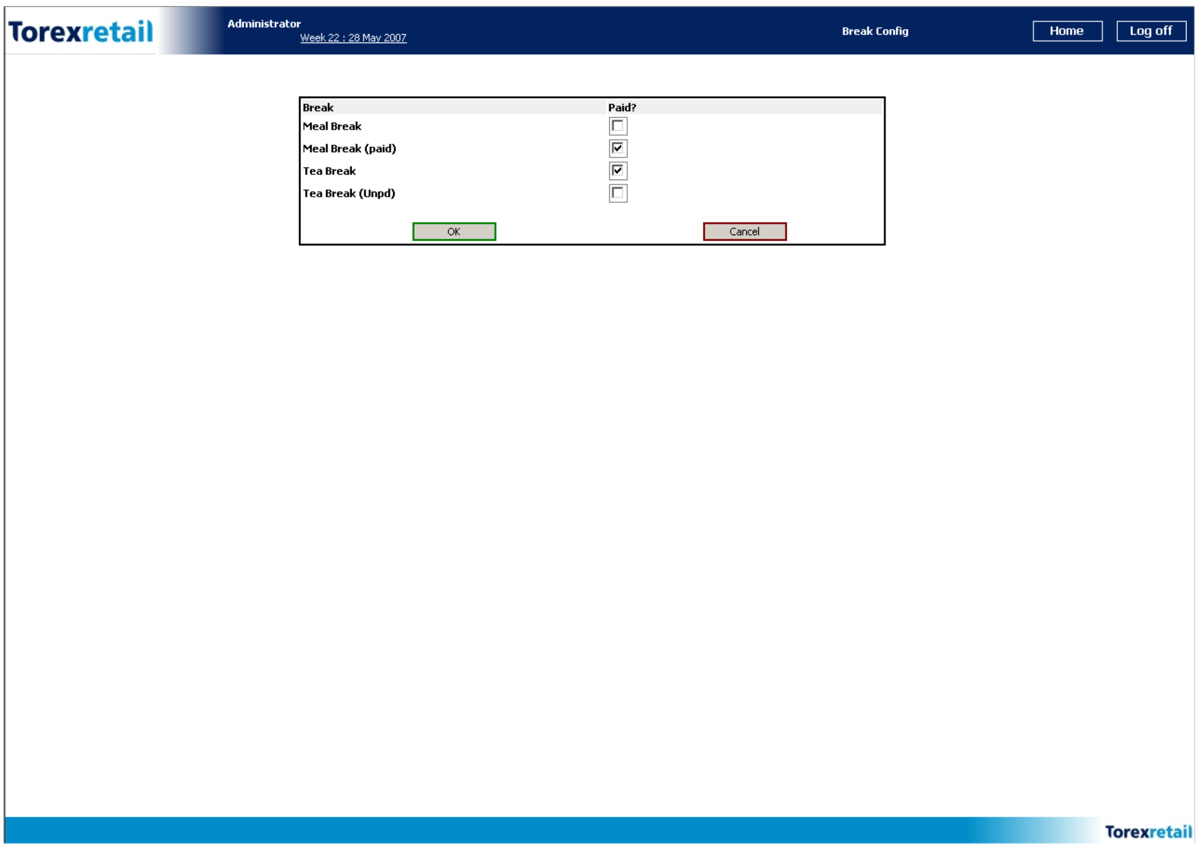
Delete a Break Pattern

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 

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



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).

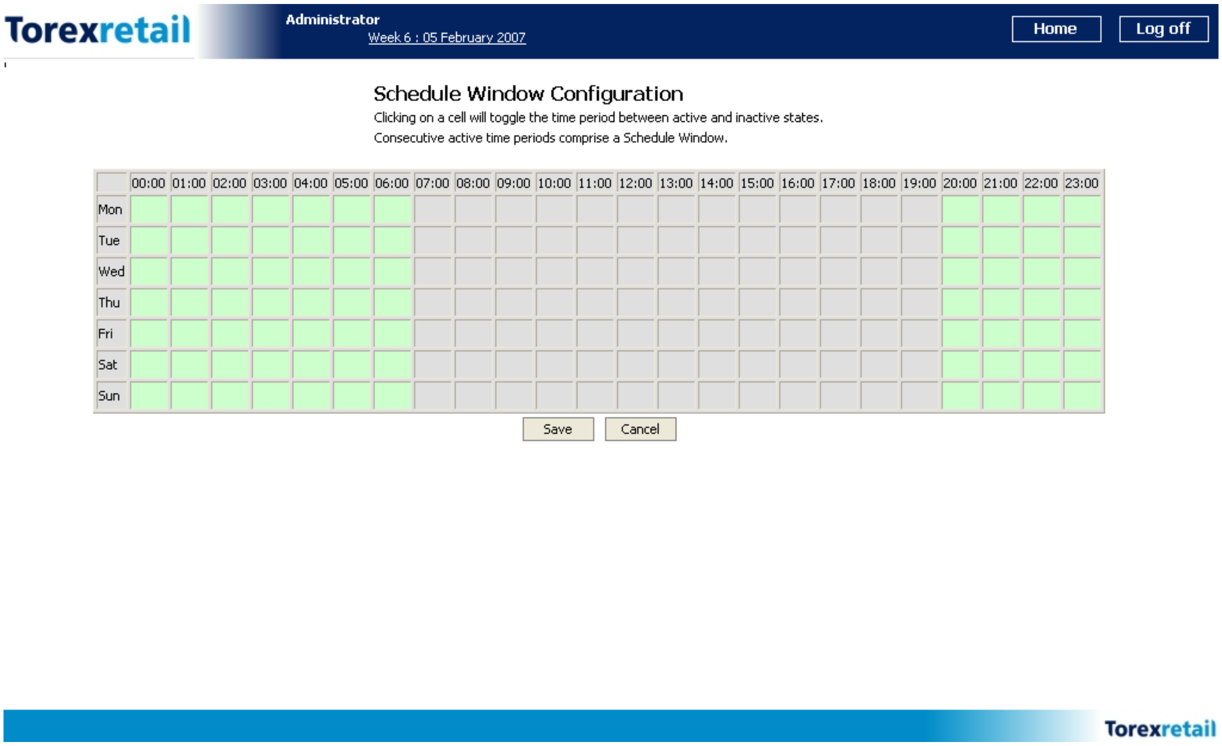
Schedule Window Config

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 

.

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



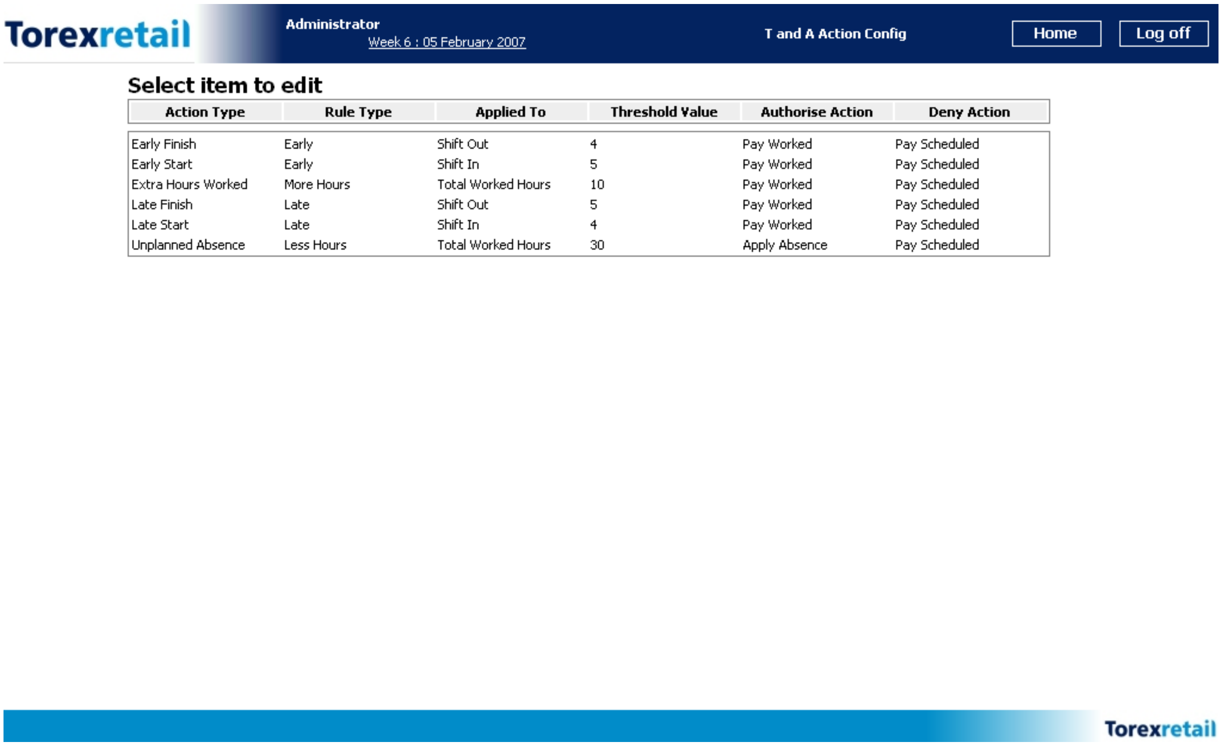
Schedule Window Configuration window

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 

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



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

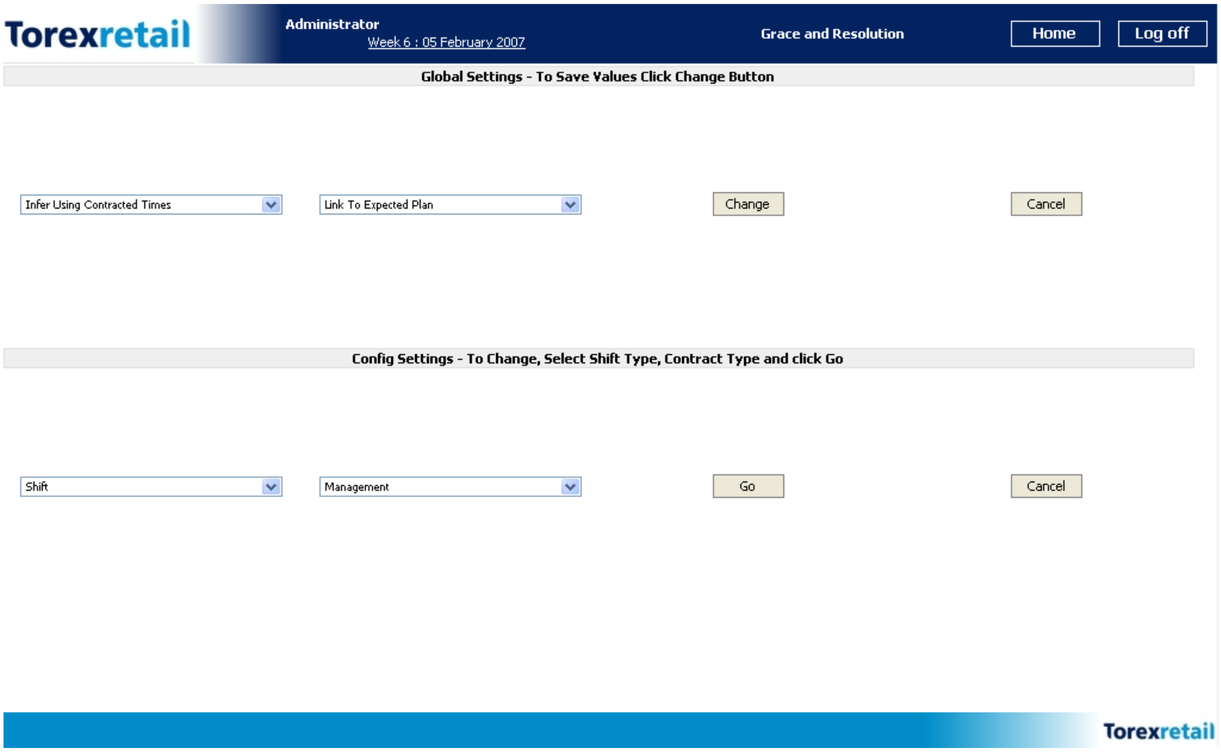
Select Item window

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 & Resolution

1. To view the Grace and Resolution screen, click 

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



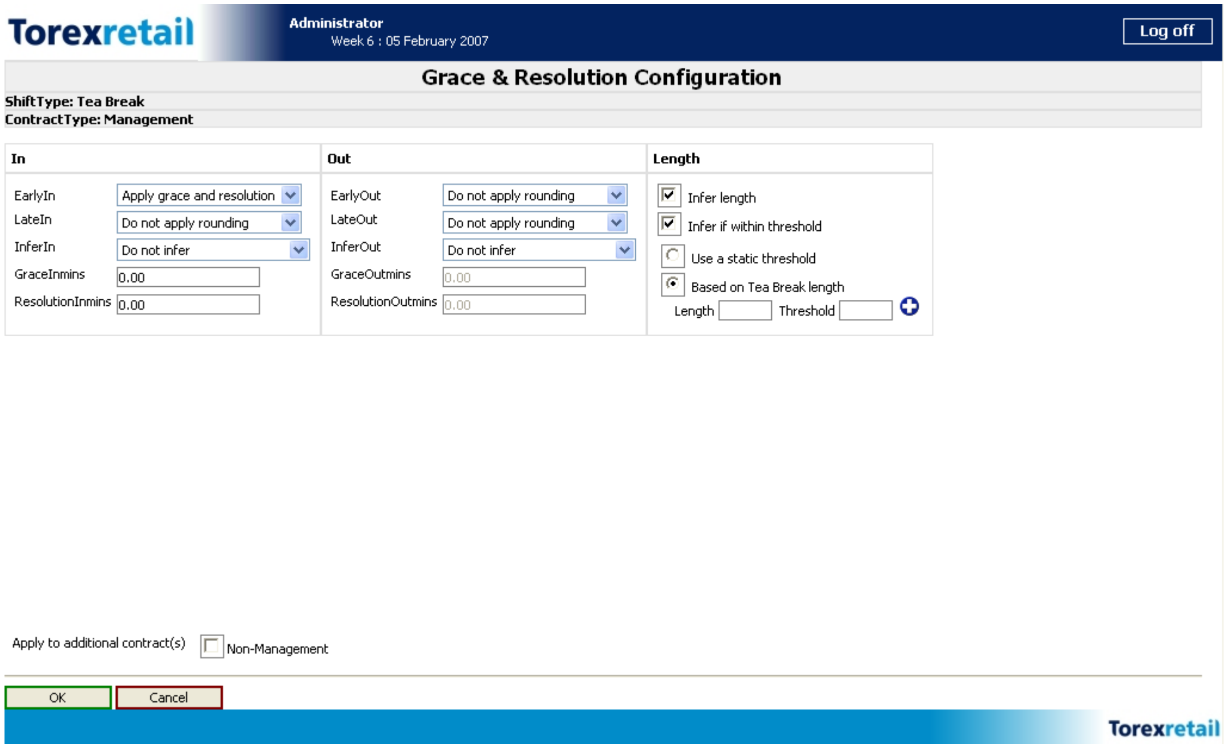
Global Settings window

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 & 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

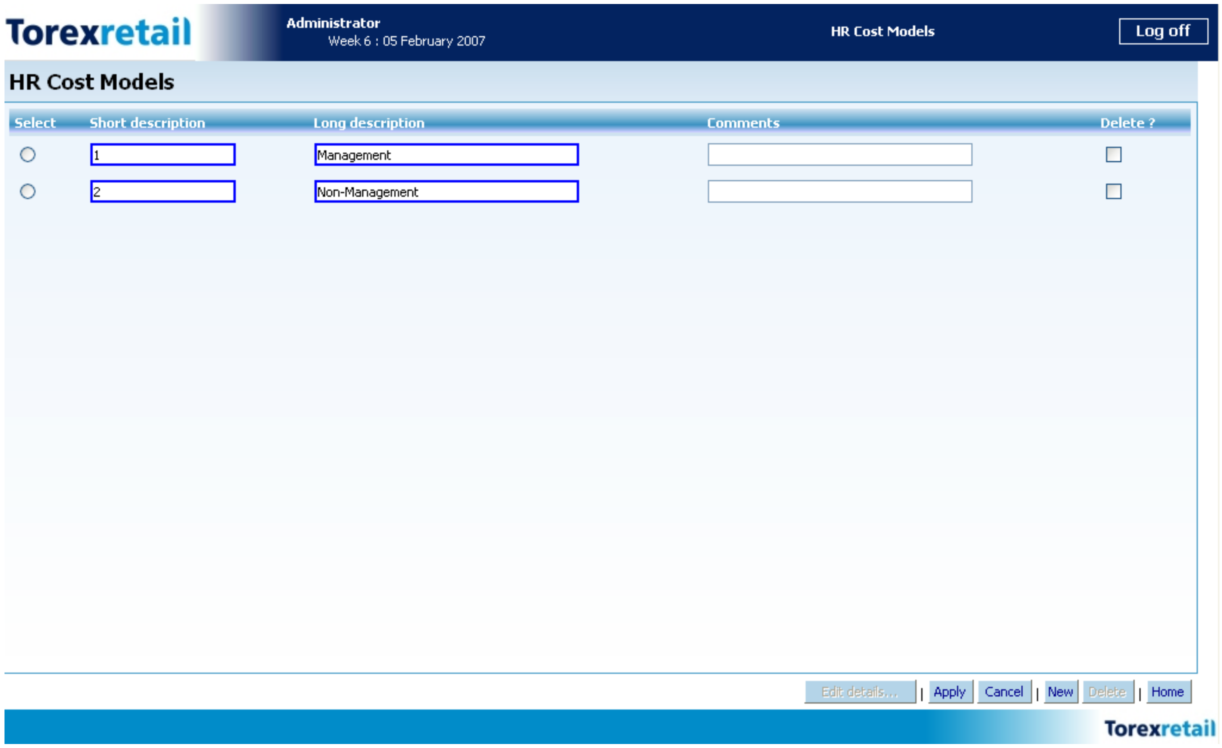
1. To view the HR Cost Models options, click HR Cost Models.

Absence Config

1. To view the Absence Config screen, click Absence Config.
2. For further information on this screen, see Page 333.

Models

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



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.

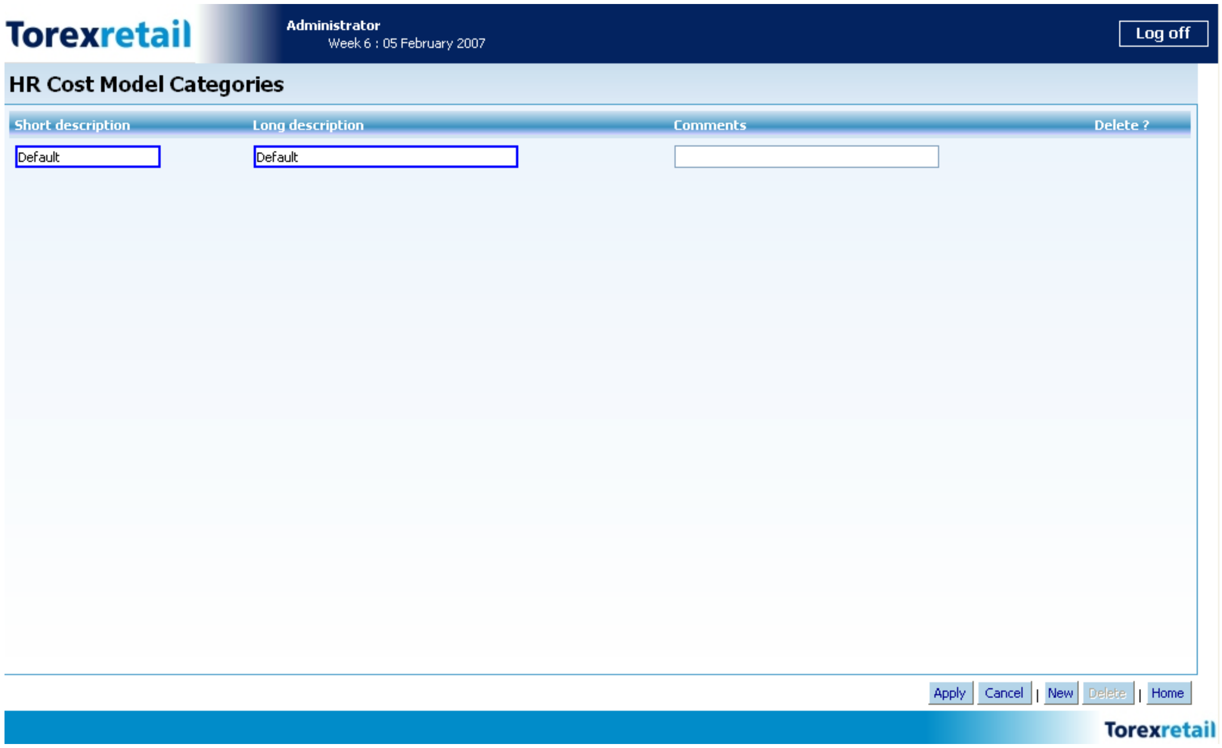
Delete a Model

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 

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



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

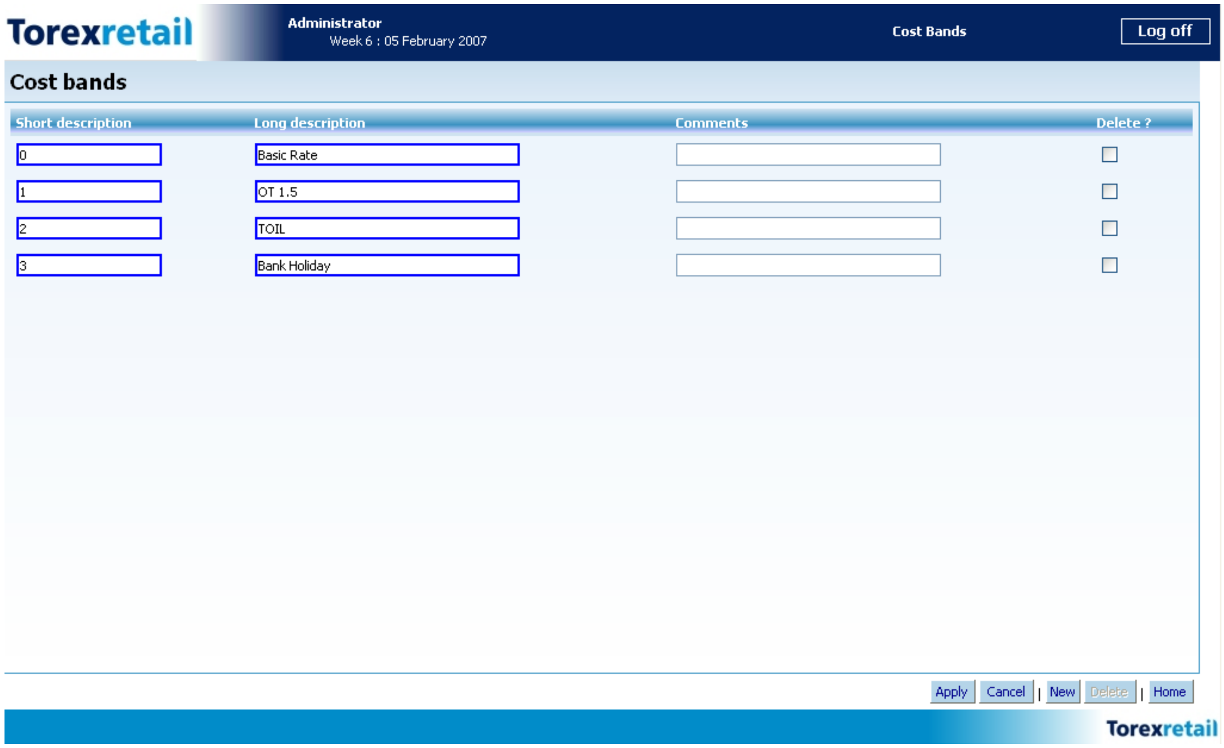
1. To edit a category, make any applicable changes on the screen and click **Apply** to save the changes or **Cancel** to disregard.

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



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.

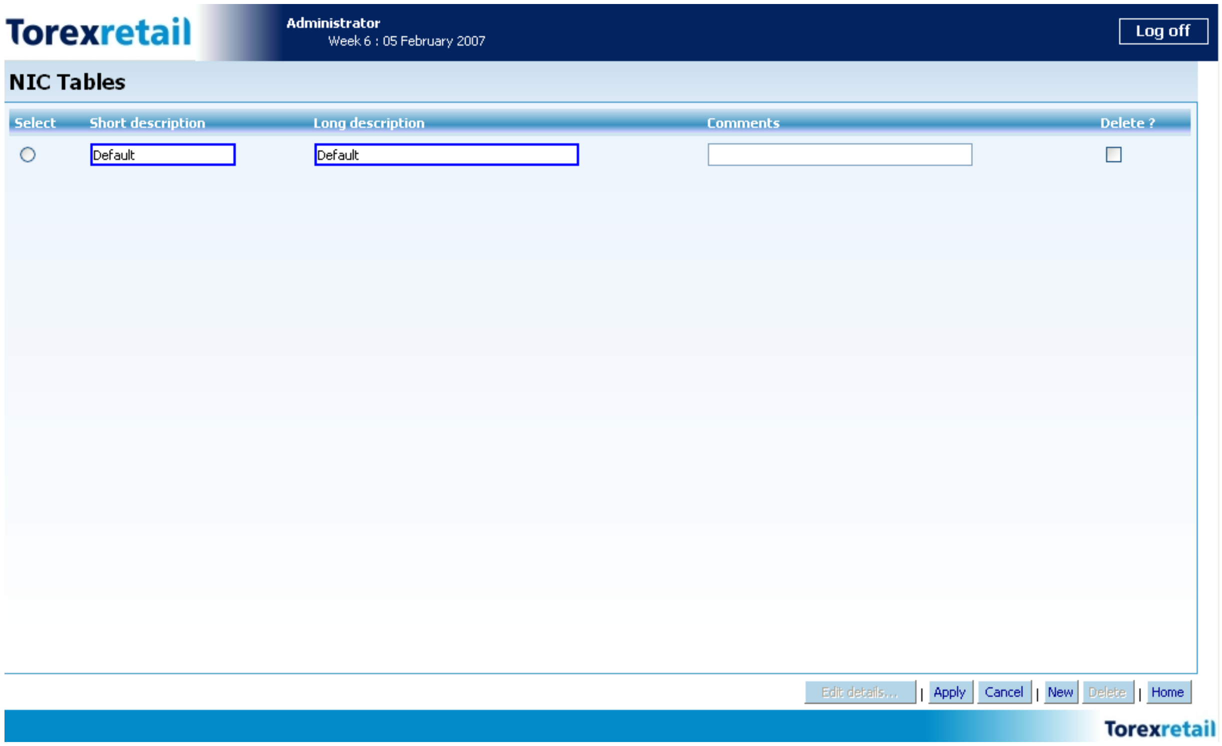
Delete a Band

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 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.

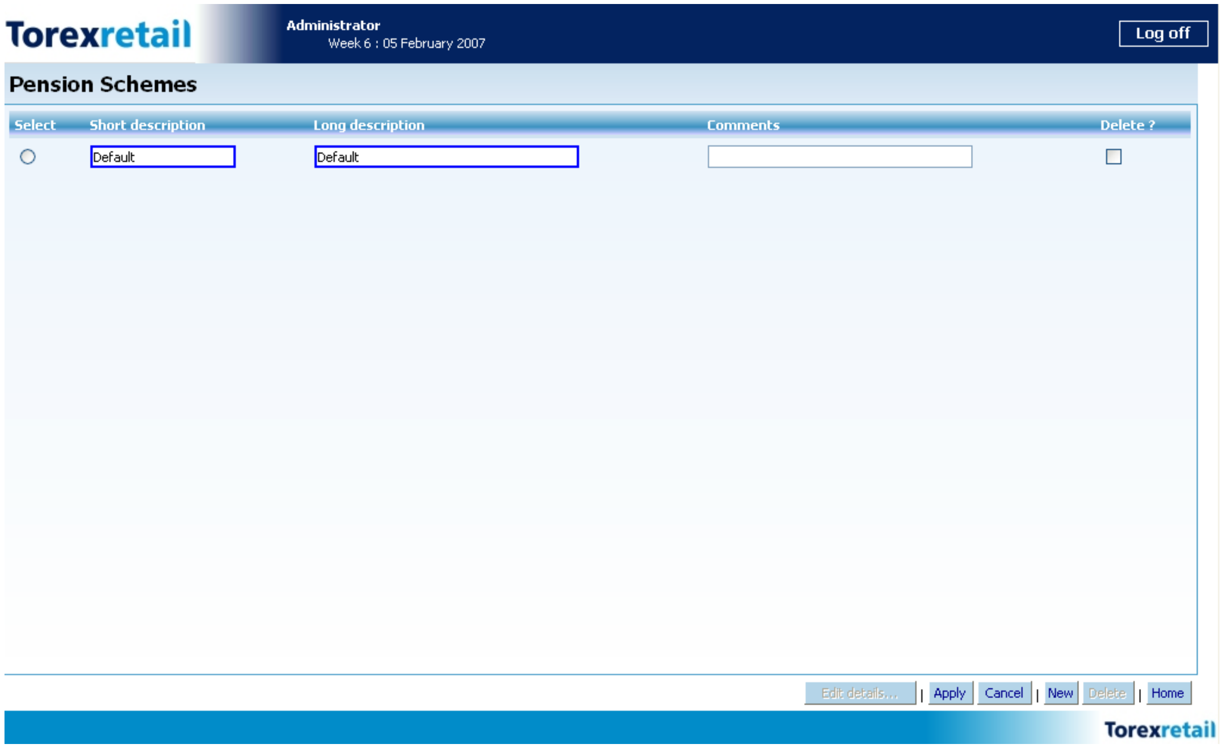
Delete an NIC Table

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 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.

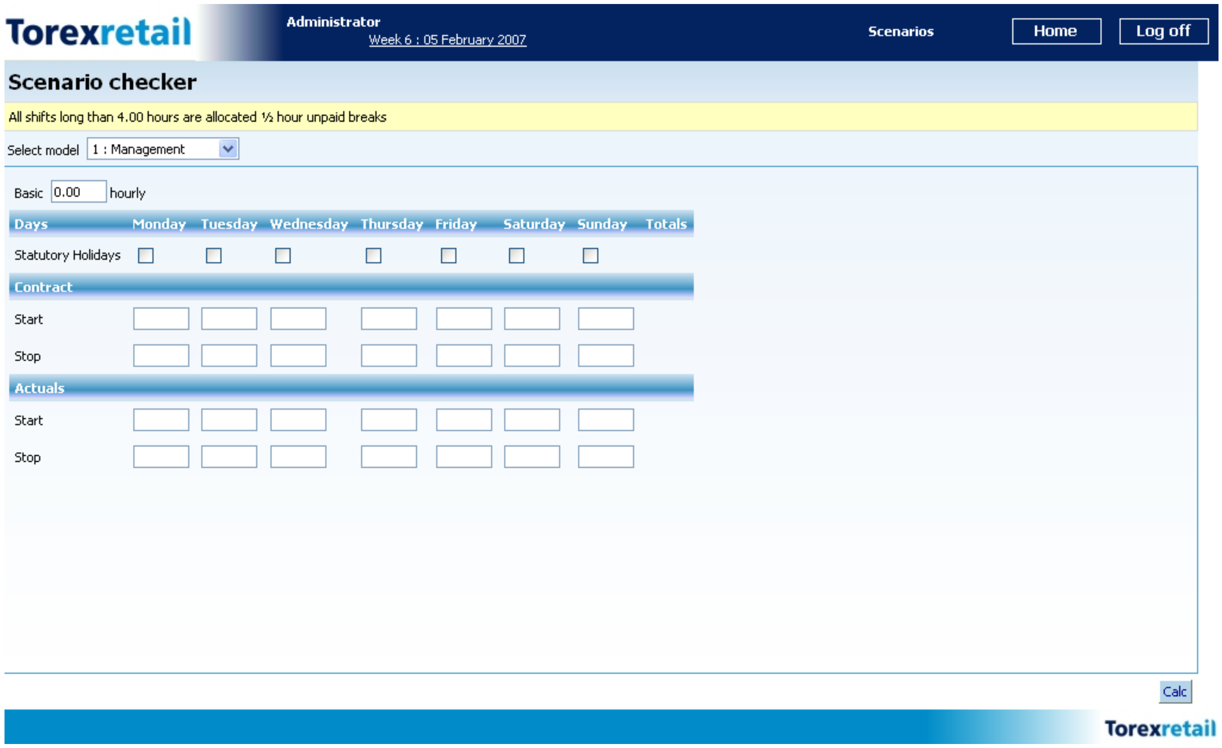
Delete a Pension Scheme

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:



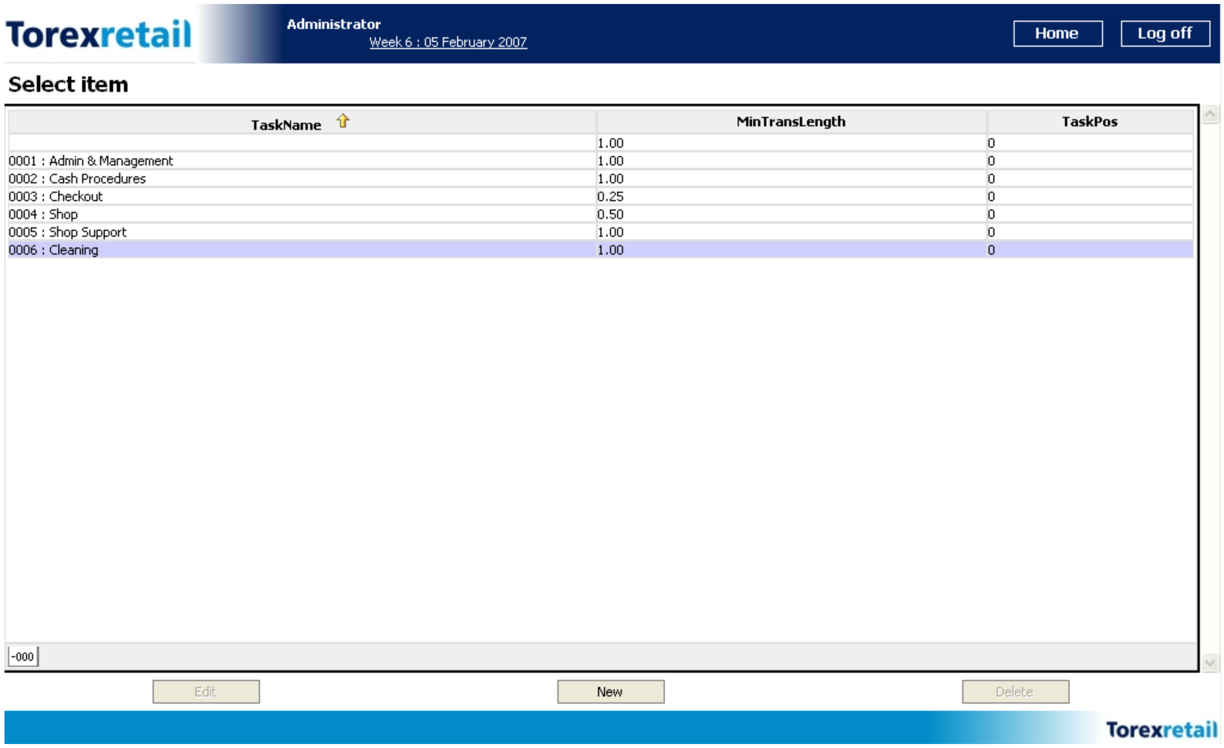
Scenario Checker window

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

1. To view the Task Schedule Options, click 

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



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.

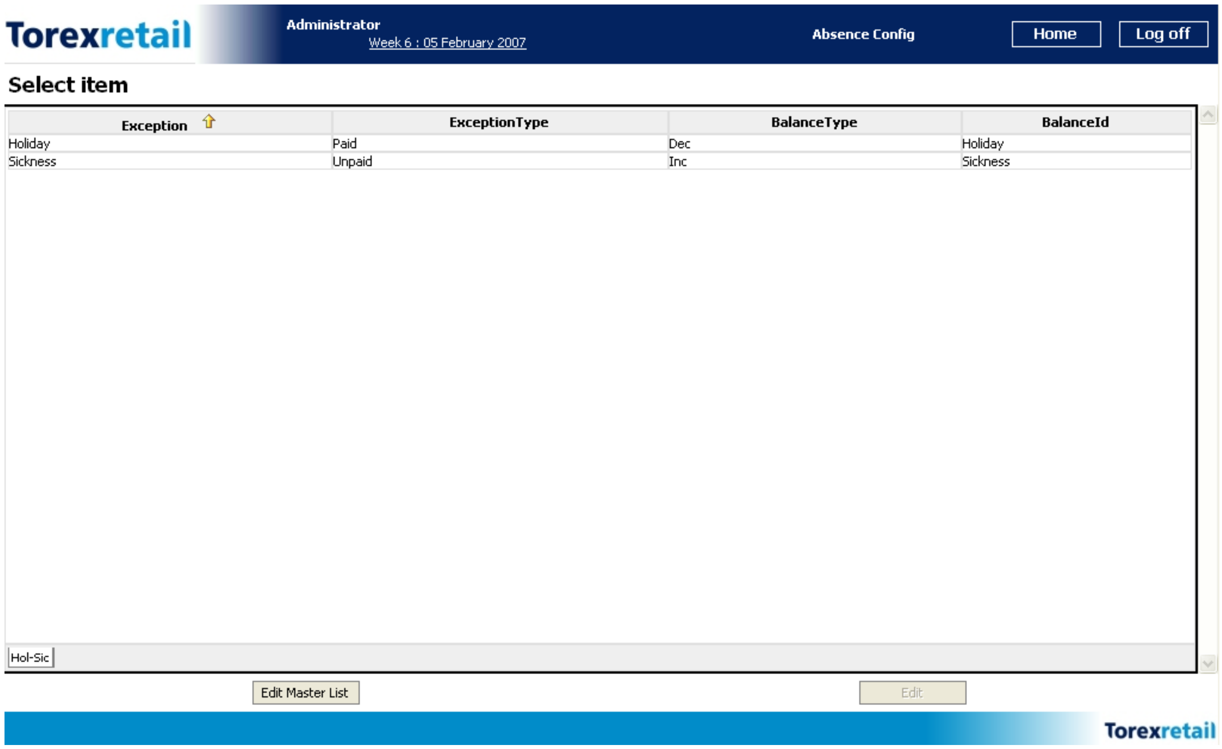
Delete a Task Schedule

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:



Select Item window

Add a New Exemption

1. To add a new exemption to the system, click **Edit Master List**.
2. Click **New**.
3. Add the relevant information and click **OK** to save and confirm or **Cancel** to disregard.

Edit an Exemption

1. To edit an exemption, click **Edit Master List**.
2. Select the relevant option from the list and click **Edit**.
3. Make the applicable changes and click **OK** to save or **Cancel** to disregard.

Delete an Exemption

1. To delete an exemption, click **Edit Master List**.
2. Select the relevant option from the list and click **Delete**.
3. You will be asked **Are you sure you want to delete this item?** Click **OK** to confirm or **Cancel** to disregard.

Edit the Details

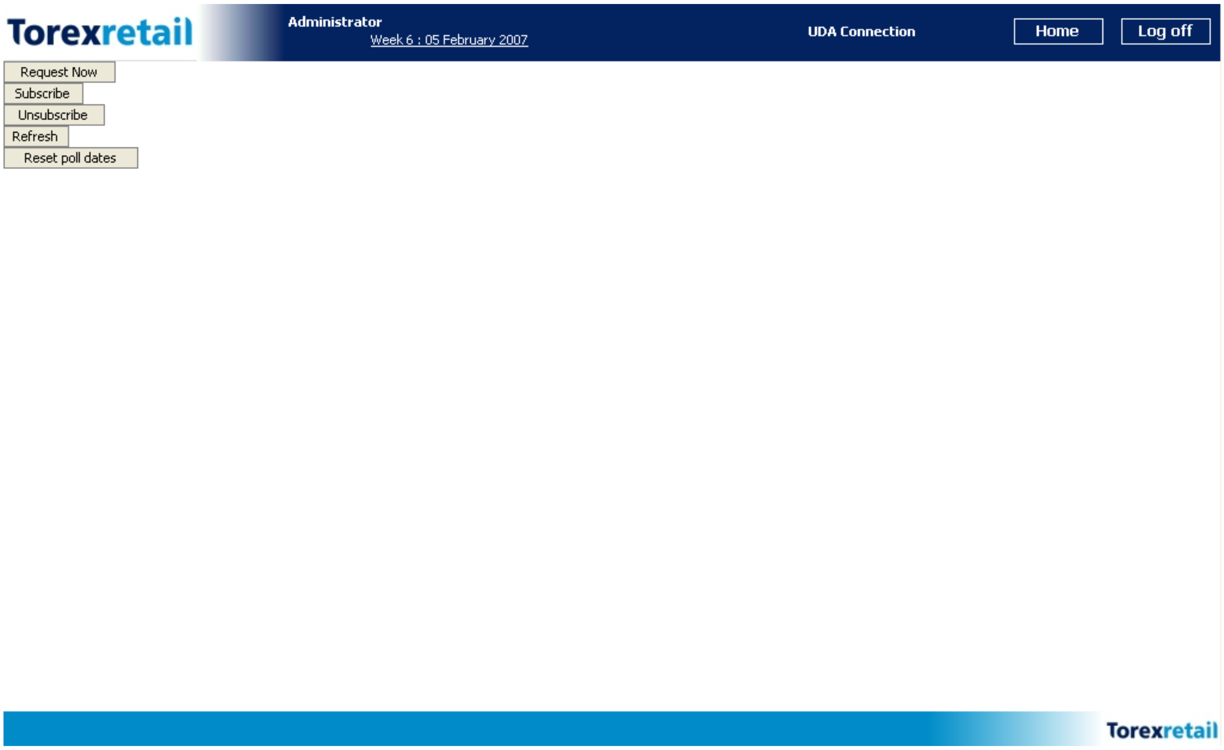
1. To edit the details for an exemption, select the relevant option from the list and click **Edit**.
2. Change the relevant information and click **OK** to save and confirm or **Cancel** to disregard.

UDA Connection

The UDA Connection is a bespoke screen used to connect 3rd party software to the system. This screen is no longer used.

1. To view the UDA Connection screen, click 

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

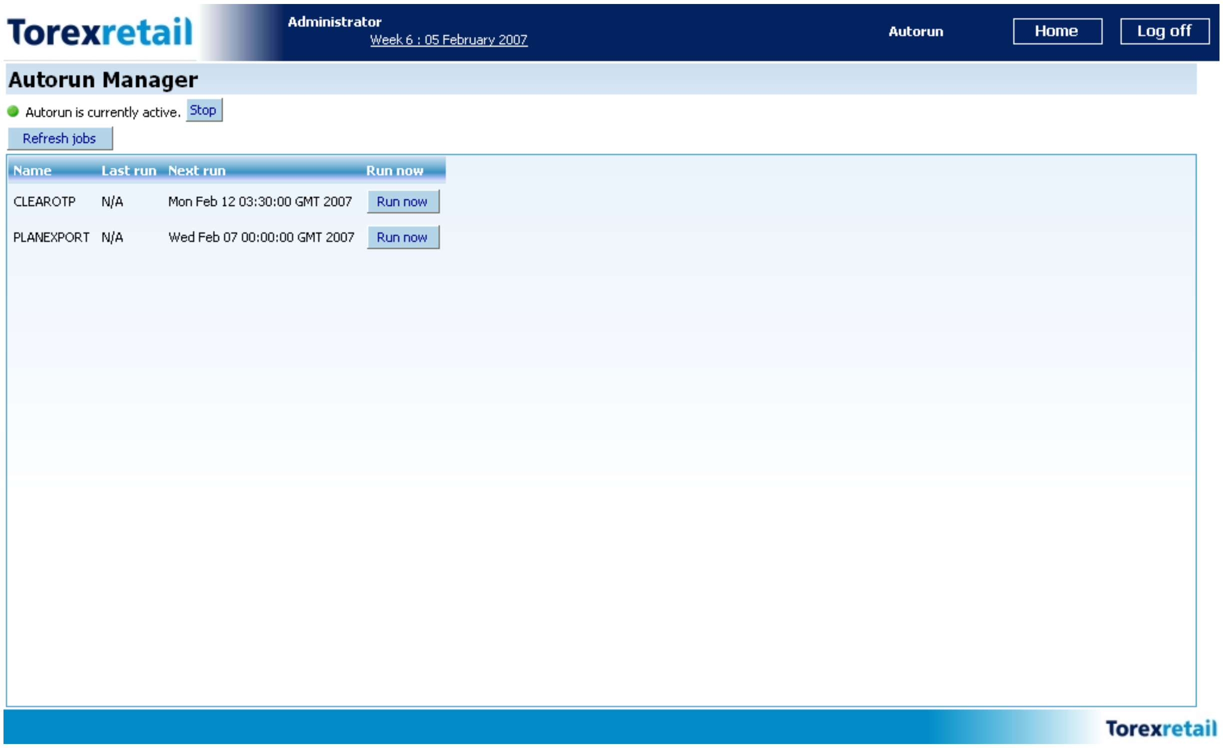


UDA Connection window

Autorun

1. To view the Autorun screen, click 

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



Autorun Manager window

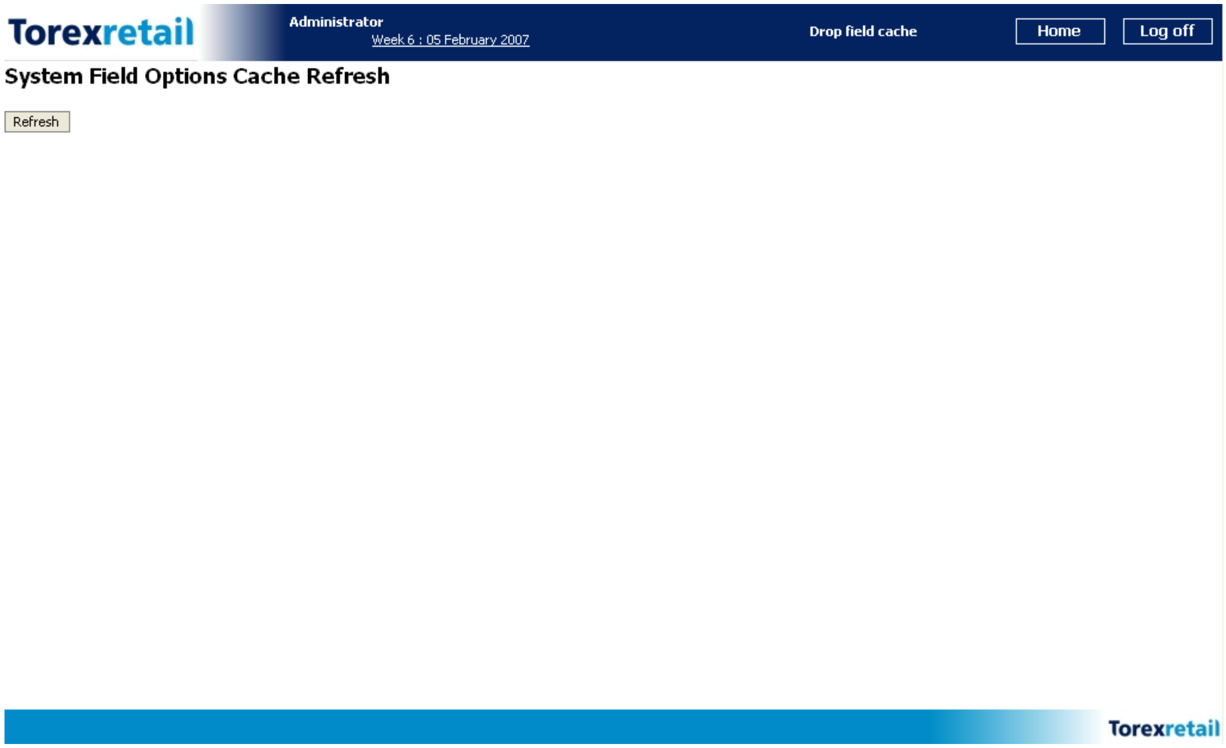
3. Any jobs which have been set to autorun at set times, will be displayed here.
4. Clicking **Stop**, at the top of the screen, will disable the autorun functionality. When clicked, the button will change to a **Start** button. Click this to re-enable the autorun functionality.
5. Clicking **Refresh Jobs** will force the system to check for additional autorun jobs. If found, they will be displayed in the list.
6. 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.

1. To view the Drop Field Cache screen, click 

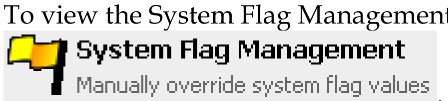
.
2. A screen, similar to that below, will be displayed:



System Field Options Cache Refresh window

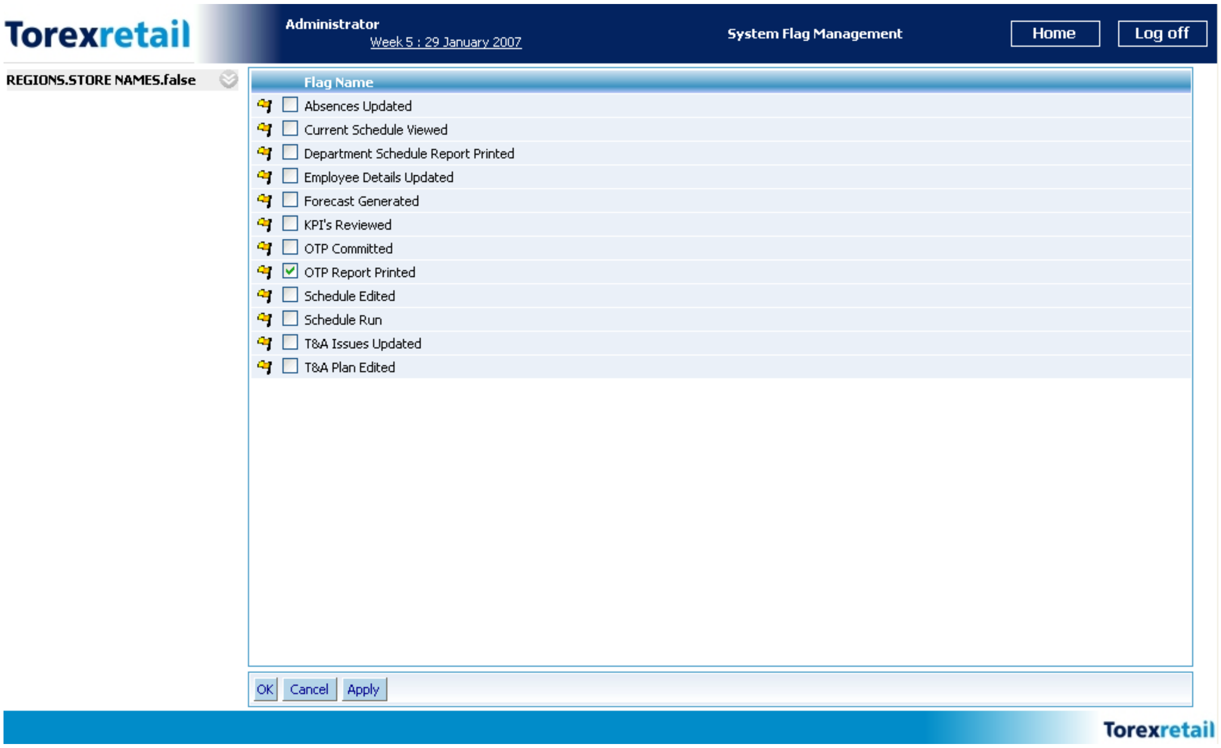
3. Click **Refresh** to refresh the cache.

System Flag Management

1. To view the System Flag Management screen, click 

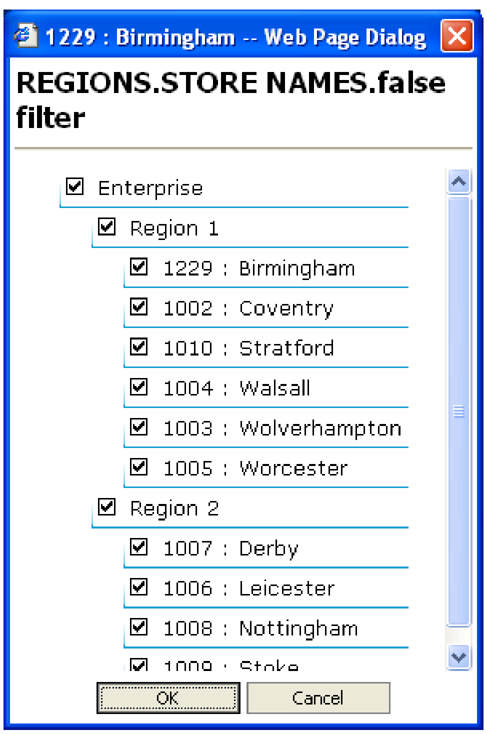
.

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



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.

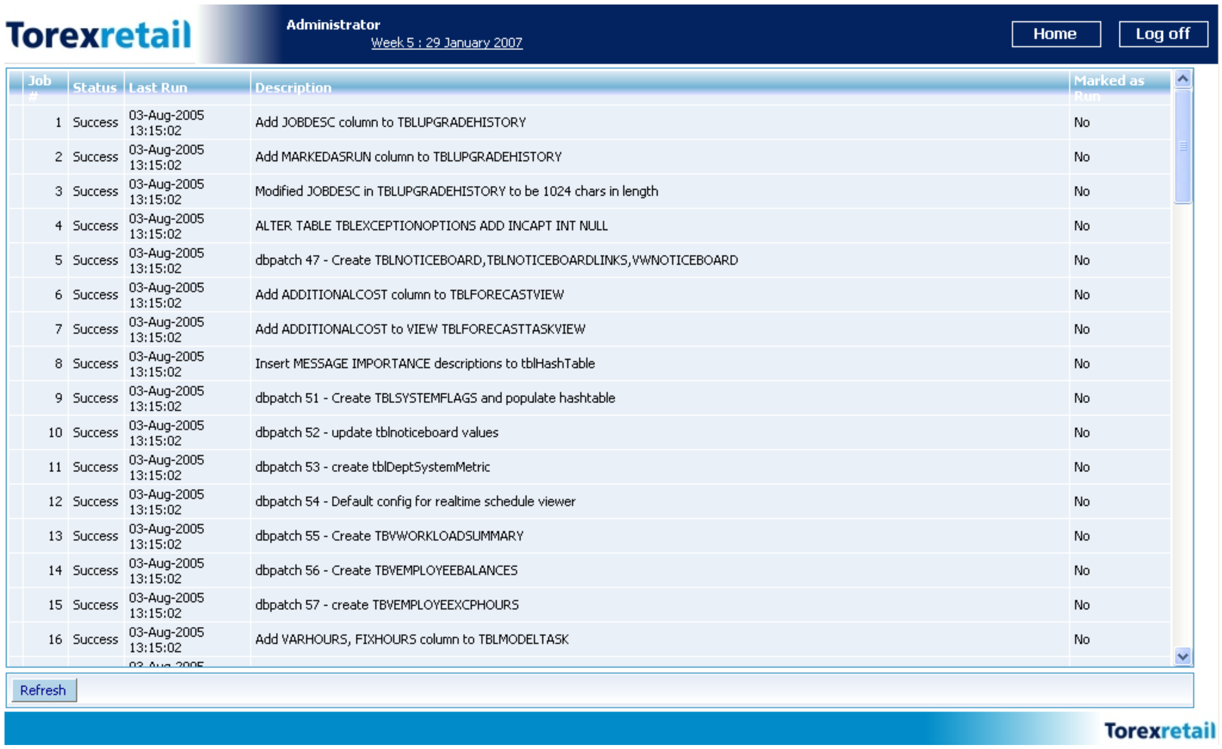


Filter window

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:



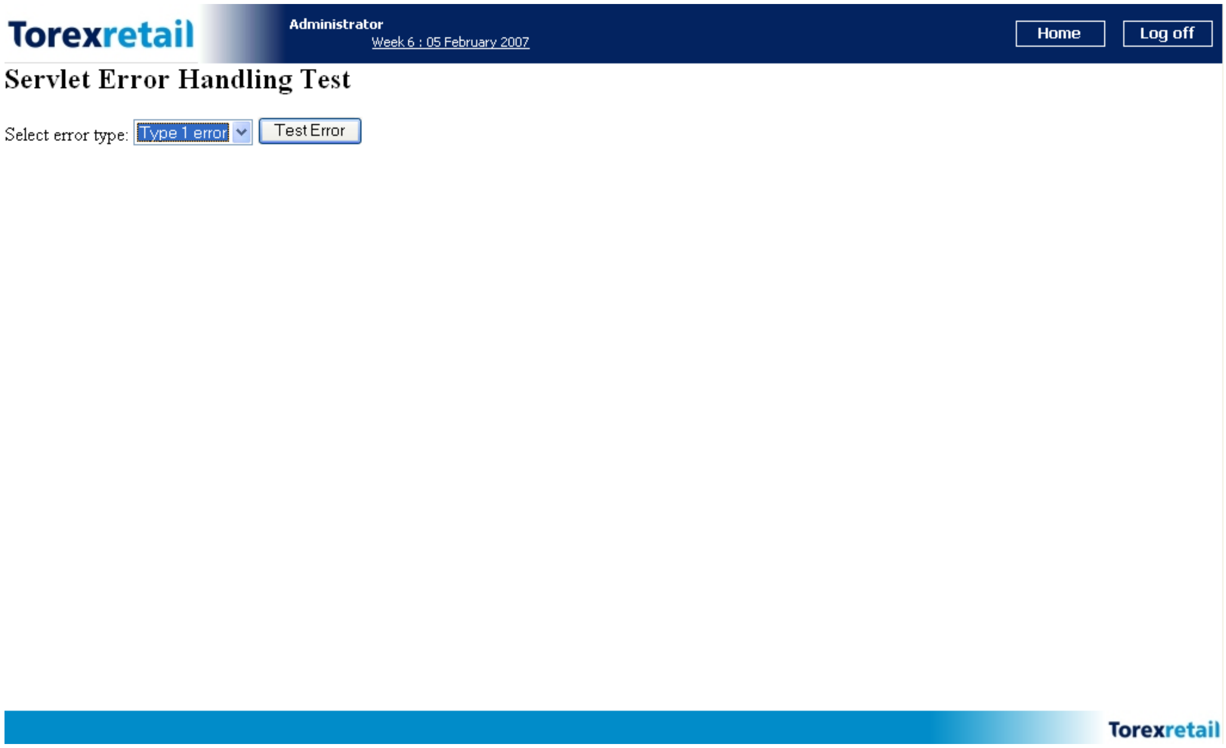
Job #	Status	Last Run	Description	Marked as Run
1	Success	03-Aug-2005 13:15:02	Add JOBDESC column to TBLUPGRADEHISTORY	No
2	Success	03-Aug-2005 13:15:02	Add MARKEDASRUN column to TBLUPGRADEHISTORY	No
3	Success	03-Aug-2005 13:15:02	Modified JOBDESC in TBLUPGRADEHISTORY to be 1024 chars in length	No
4	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 TBVEMPLOYEEXCPHOURS	No
16	Success	03-Aug-2005 13:15:02	Add VARHOURS, FIXHOURS column to TBLMODELTASK	No

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:



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

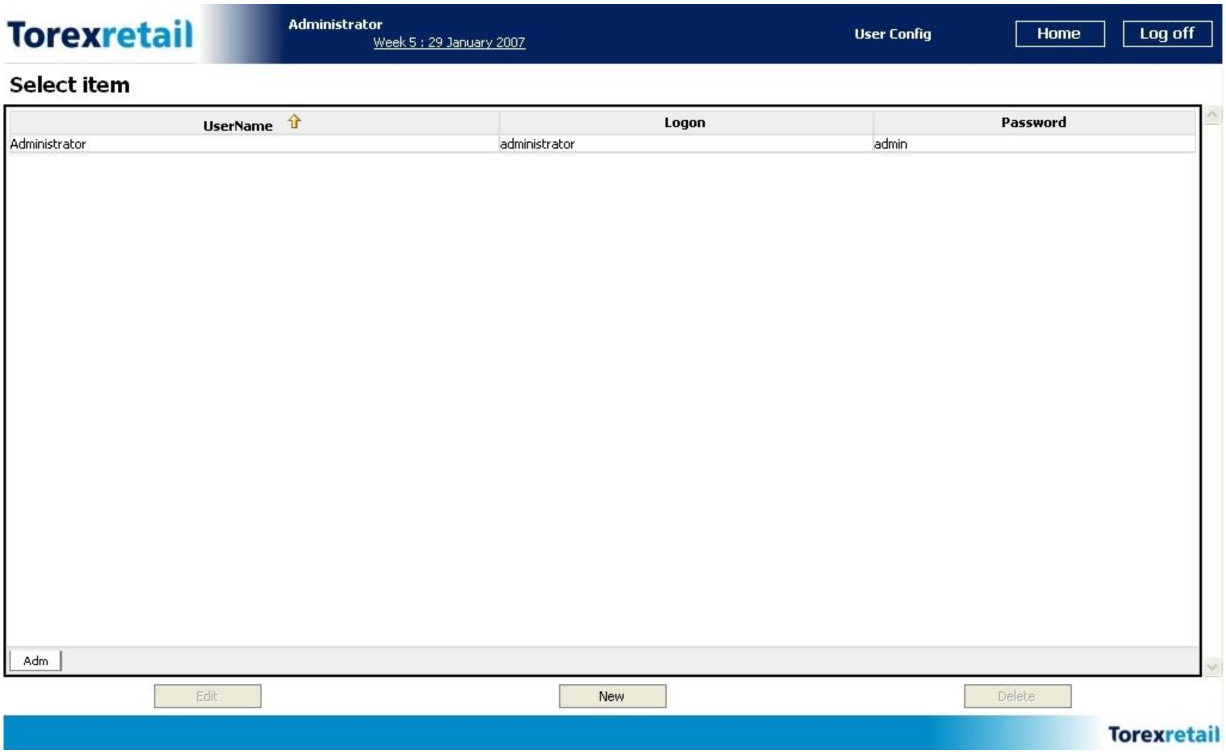
1. To view the User Configuration options, click 

.

User Config

1. To view the User Configuration screen, click 

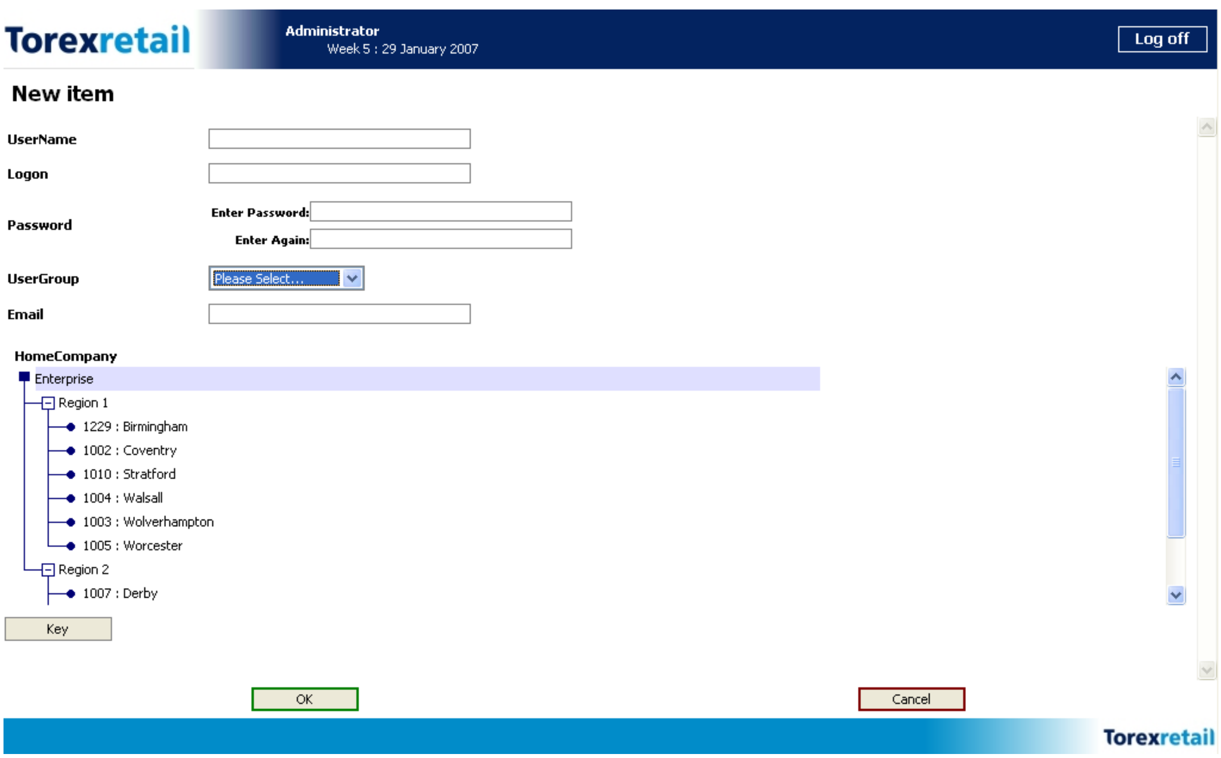
.
2. A screen, similar to that below, will be displayed:



Select Item 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 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.

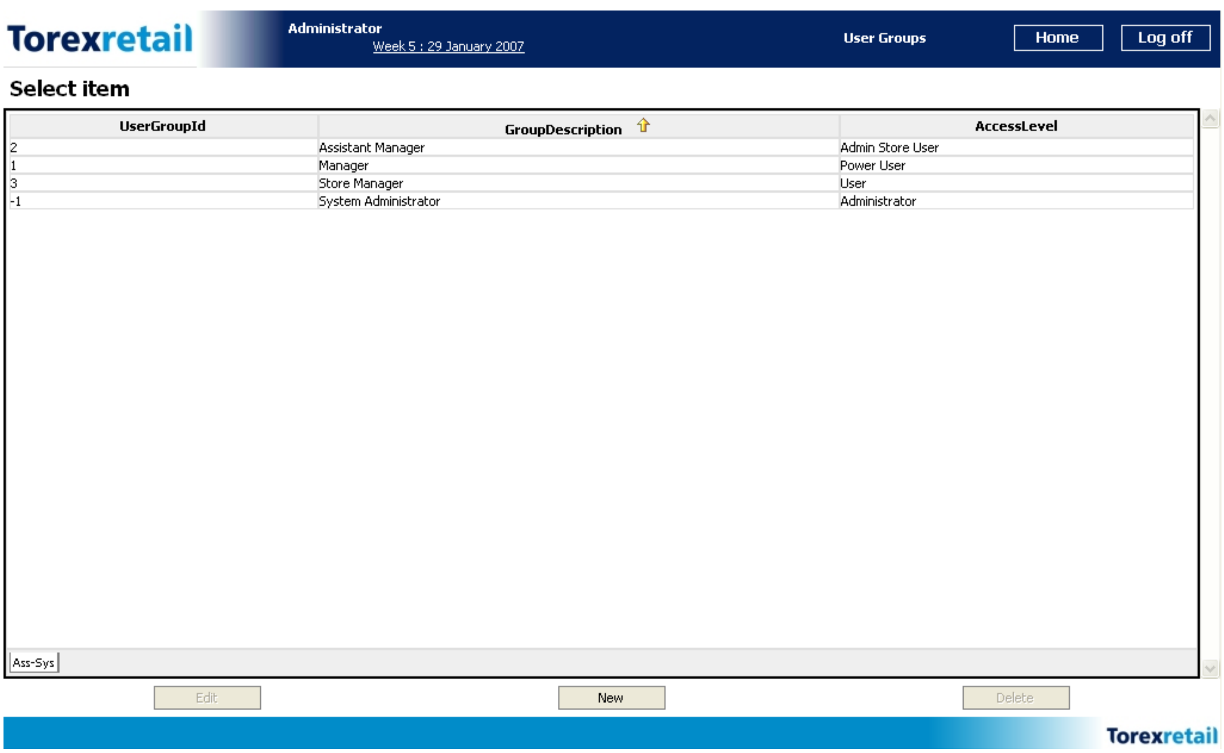
Deleting a User

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 

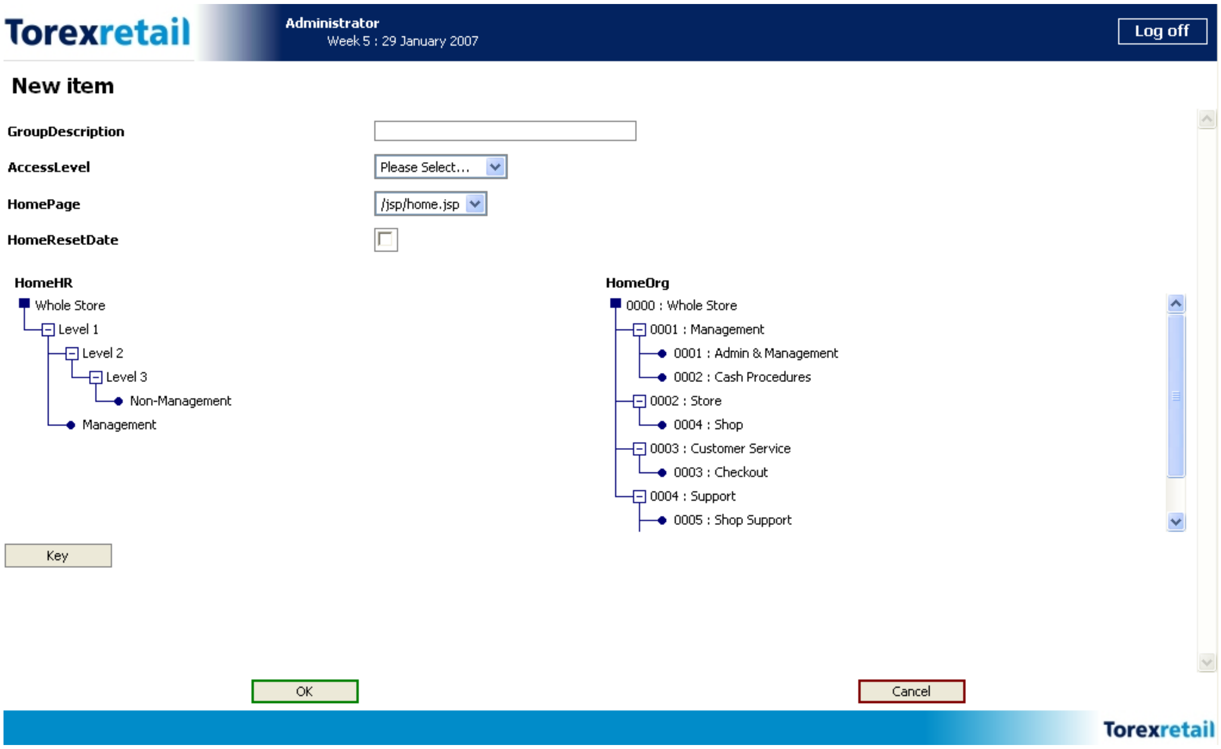
.
2. A screen, similar to that below, will be displayed:



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:



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

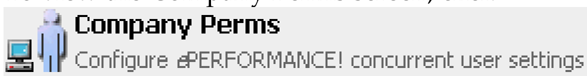
1. To edit a user group, click name. It will become highlighted.
2. Click **Edit**.
3. Make any changes and click **OK** to save and confirm or **Cancel** to disregard.

Deleting a User Group

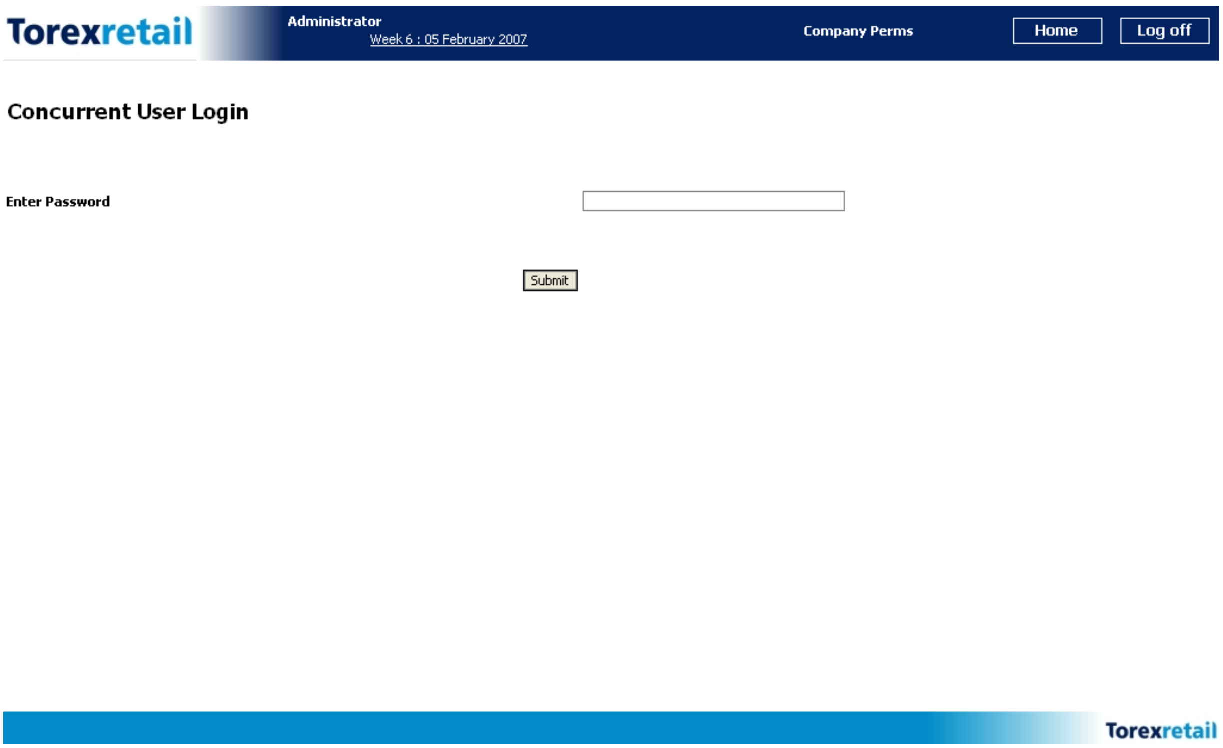
1. To delete a user group from the system, click name. It will become highlighted.
2. Click **Delete**.
3. You will be asked **Are you sure you want to delete this item?** Click **Yes** to confirm or **Cancel** to disregard.

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.

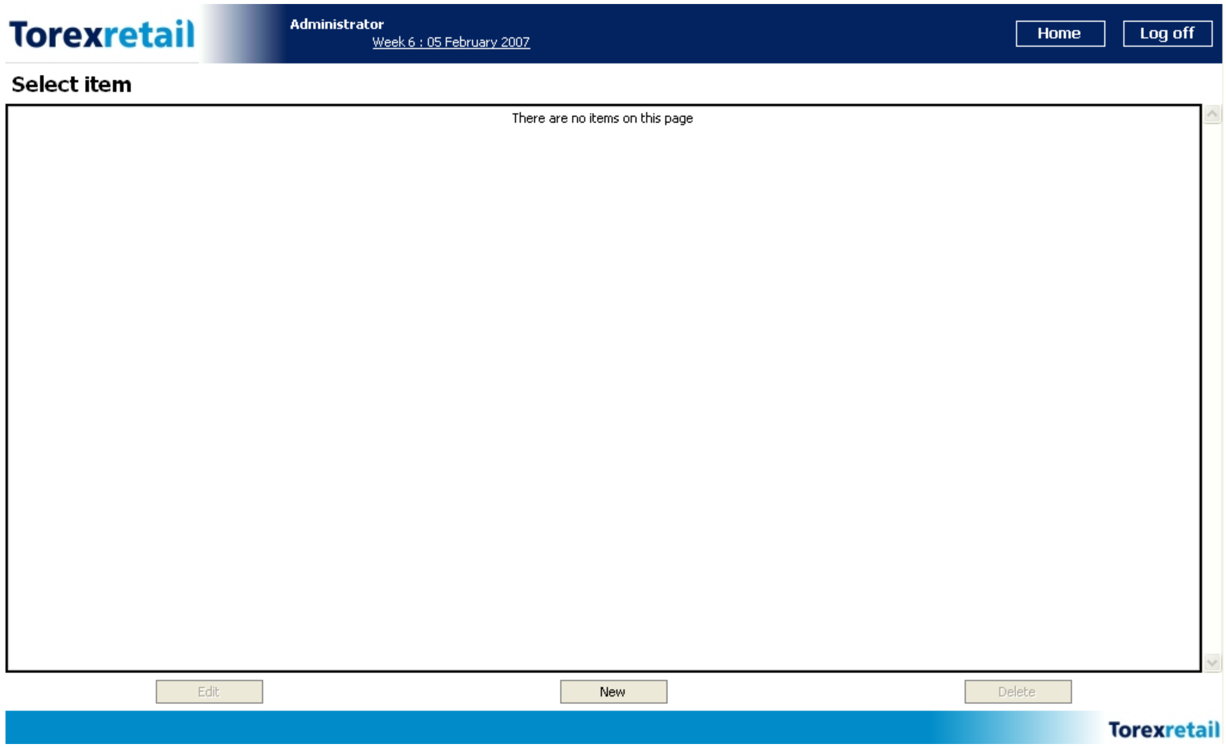
1. To view the Company Perms screen, click 

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



Concurrent User Login window

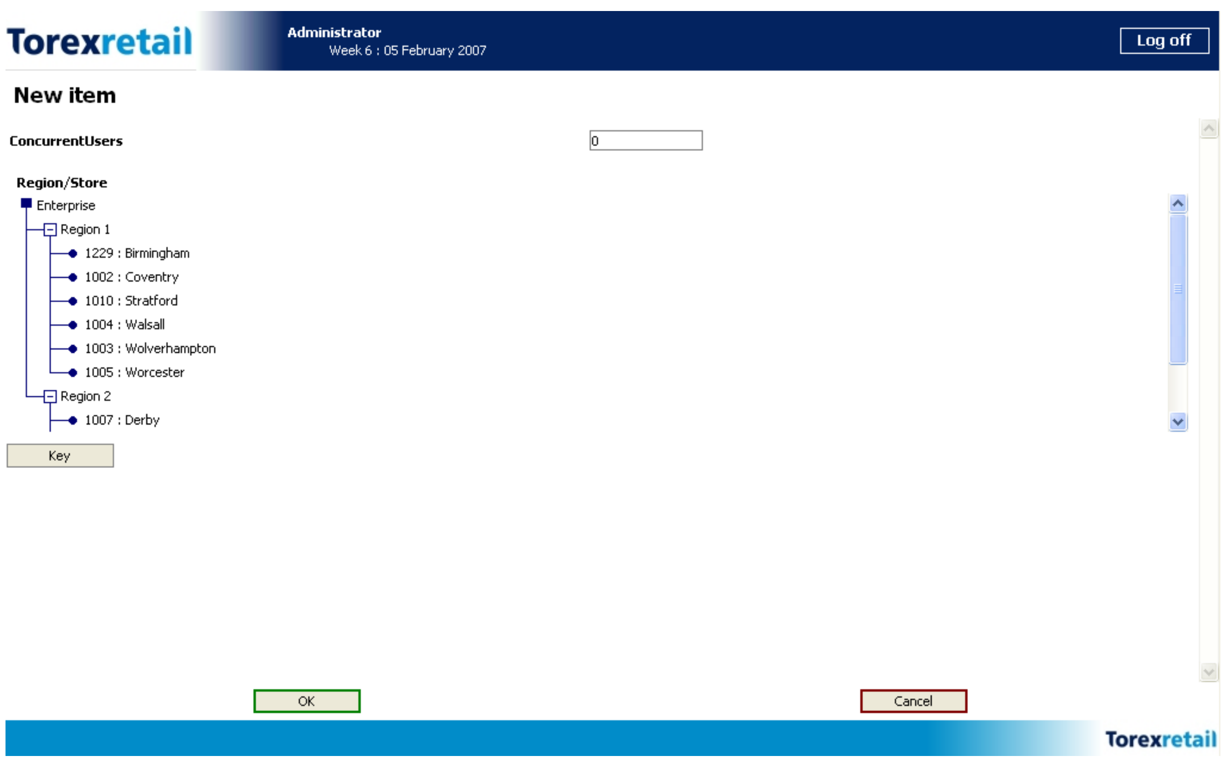
3. Enter the relevant password and click **Submit**.
4. A screen, similar to that below, will be displayed:



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 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.

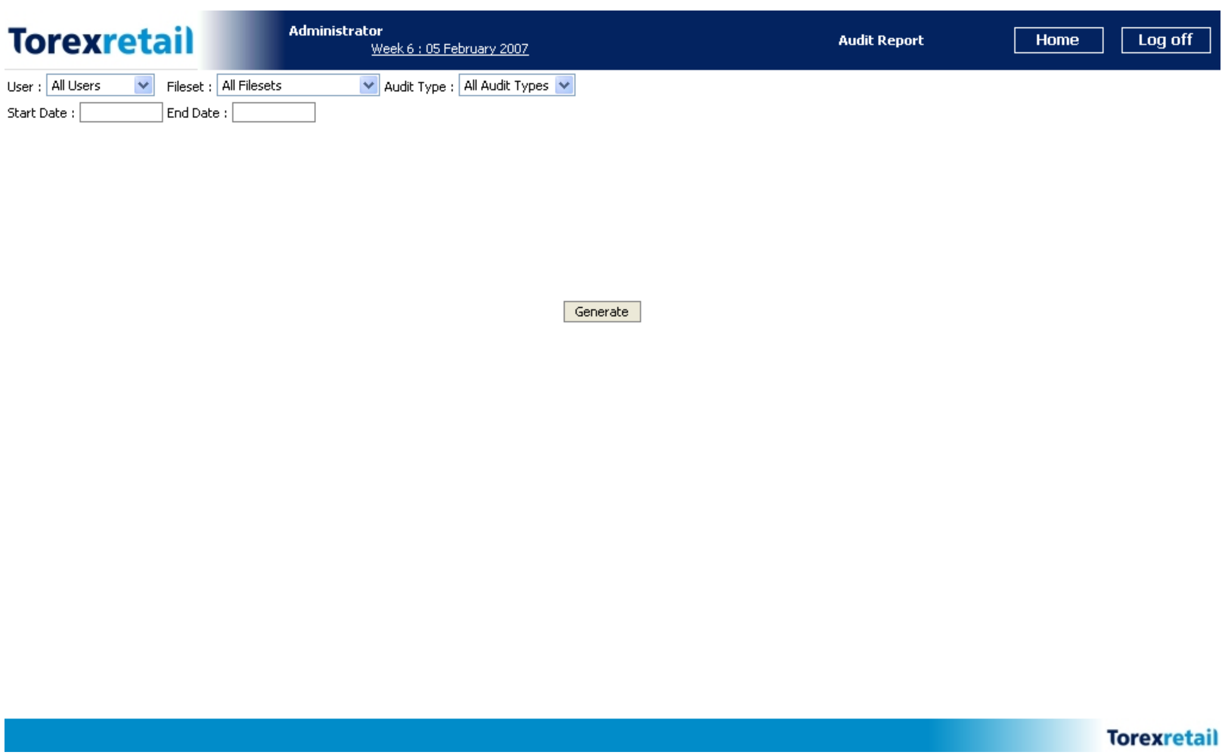
Delete a Setting

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

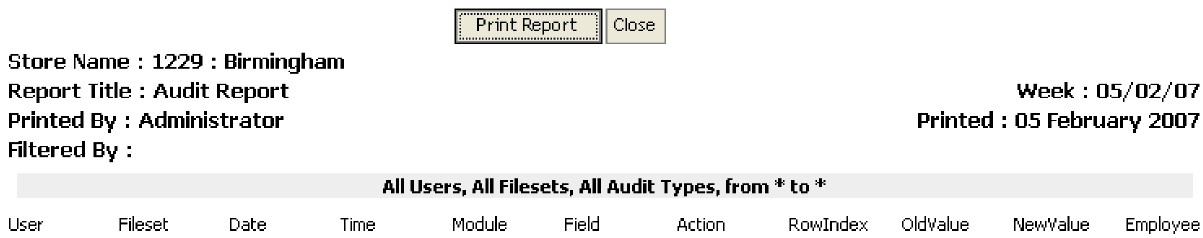
1. To view the Audit Report screen, click 

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



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 Week : 05/02/07
Printed By : Administrator Printed : 05 February 2007
Filtered By :

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.

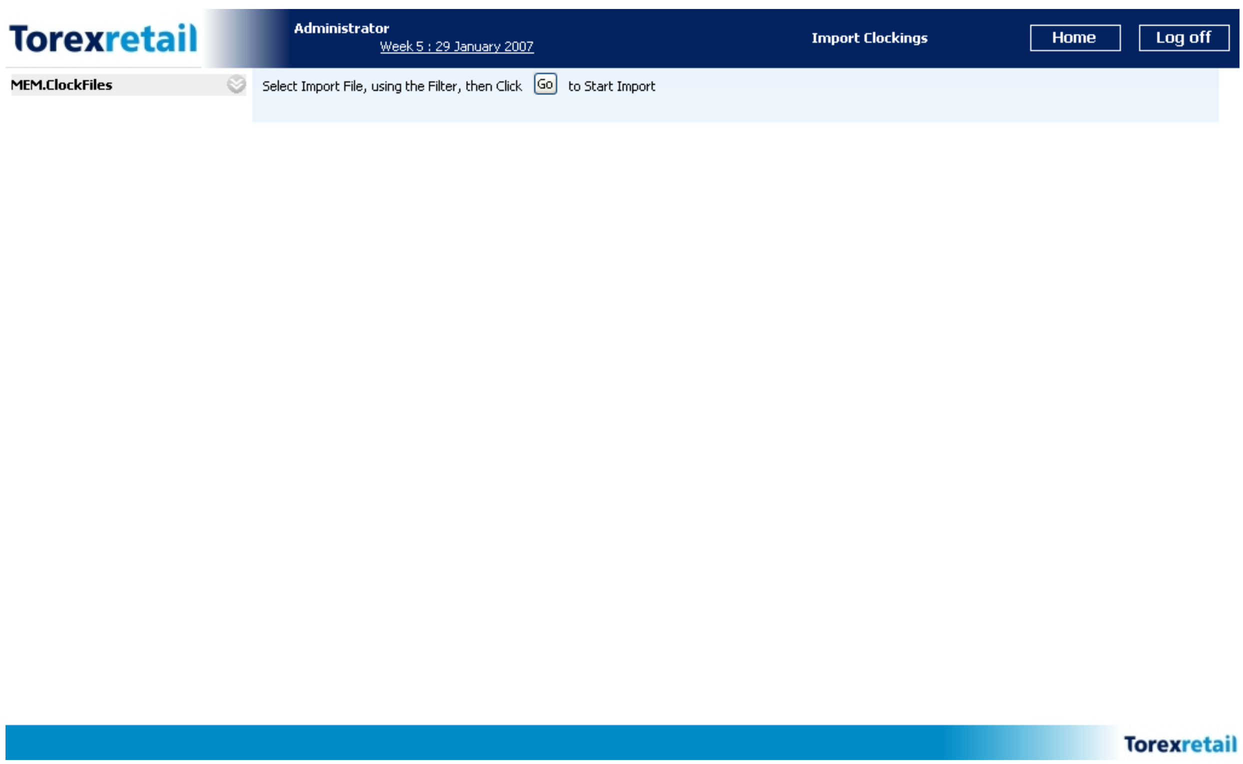
11. Click **Close** to exit the screen.

Import Clockings

1. To manually import the clockings data, click 

.

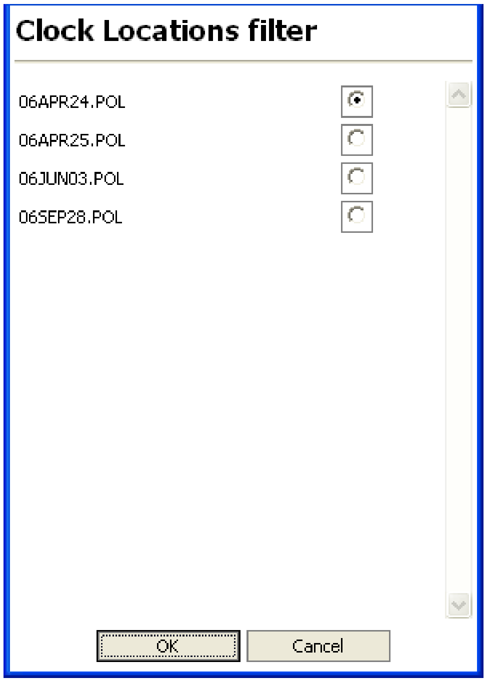
2. A screen, similar to that below, will be displayed:



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

Filename	Tags
C:\Program Files\Apache Software Foundation\Tomcat 5.5 \webapps\ePerformance\templates\mvc/controls.html	home, scriptFile, isPopup, buttonName, buttonScript, embeddedScript, scriptPath, buttonLabel
C:\Program Files\Apache Software Foundation\Tomcat 5.5 \webapps\ePerformance\templates\mvc/messagenew.html	itemType
C:\Program Files\Apache Software Foundation\Tomcat 5.5 \webapps\ePerformance\templates\rep/RepGenPage.html	REP_FIL_OPT_VAL, GEN_BUTTON_NAME, REP_TITLE, REP_FIL_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\ePerformance\templates\rep/repHeader.html	PrintDate, CurrentWeek, BranchName, Title, WeekNo, filterTitle, filterList, UserName, periodNumber
C:\Program Files\Apache Software Foundation\Tomcat 5.5 \webapps\ePerformance\templates\mvc/overview.html	rowindex, CUSTOMPARAMS, mode, filterId, home, navi, SHOWHIDEHOME, progressFrame, isPopup
C:\Program Files\Apache Software Foundation\Tomcat 5.5 \webapps\ePerformance\templates\navi.html	CurrentForm, FILTER_ID, LINKCAPTION, Info, NoselItems, CustSubmit, IMPNAVISCRIPT, SelItems, 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\ePerformance\templates\redirect.html	url, content
C:\Program Files\Apache Software Foundation\Tomcat 5.5 \webapps\ePerformance\templates\mvc/messagedelete.html	itemName, LOCK_MESSAGE
C:\Program Files\Apache Software Foundation\Tomcat 5.5 \webapps\ePerformance\templates\mvc/messageedit.html	itemName, LOCK_MESSAGE
C:\Program Files\Apache Software Foundation\Tomcat 5.5 \webapps\ePerformance\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\ePerformance\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\ePerformance\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\ePerformance\templates\mvc/messageselect.html	home, paramValue, target, itemType, findText, paramName
C:\Program Files\Apache Software Foundation\Tomcat 5.5 \webapps\ePerformance\templates\exclfilt.html	NaviSubmit, NaviPath, ItmDesc, NaviId, ItmChecked, ItmId

Template Info window

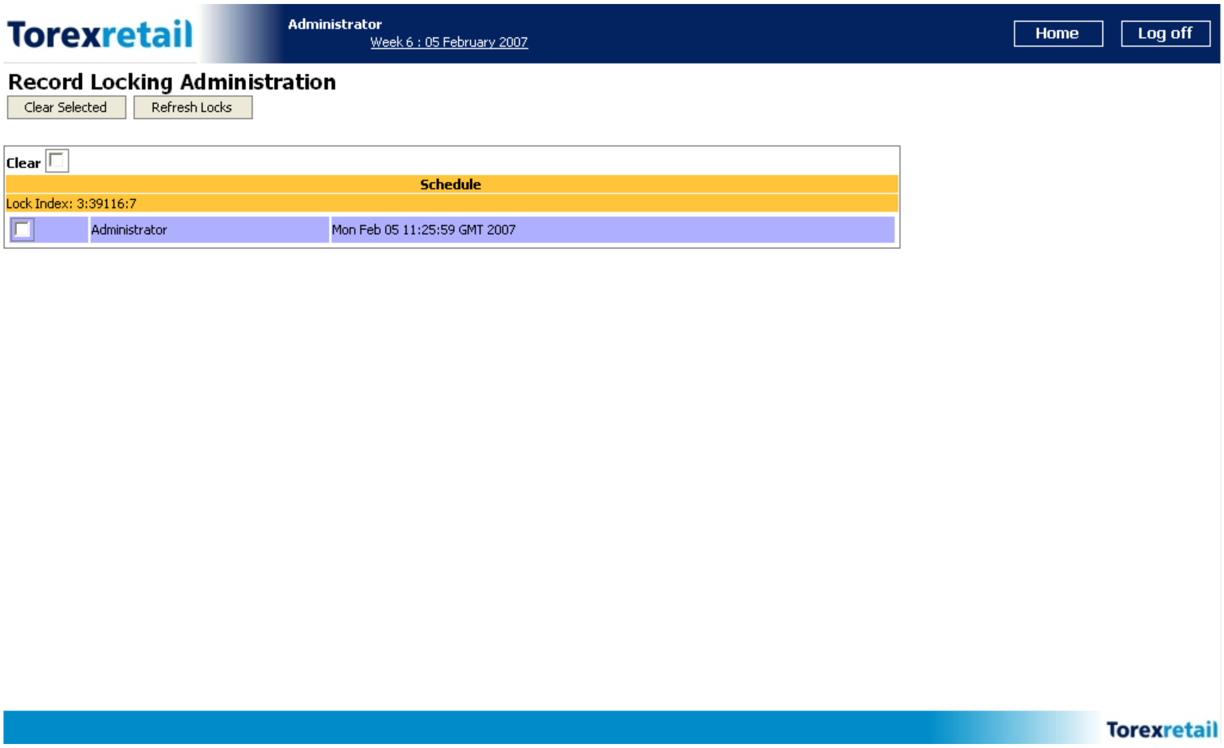
3. When you access a part of the system, which uses a set template, a log of the fields used in that template is recorded here.
4. To clear the log, click **Clear** at the top of the screen.

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.

1. To view the Record Lock Admin screen, click 

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



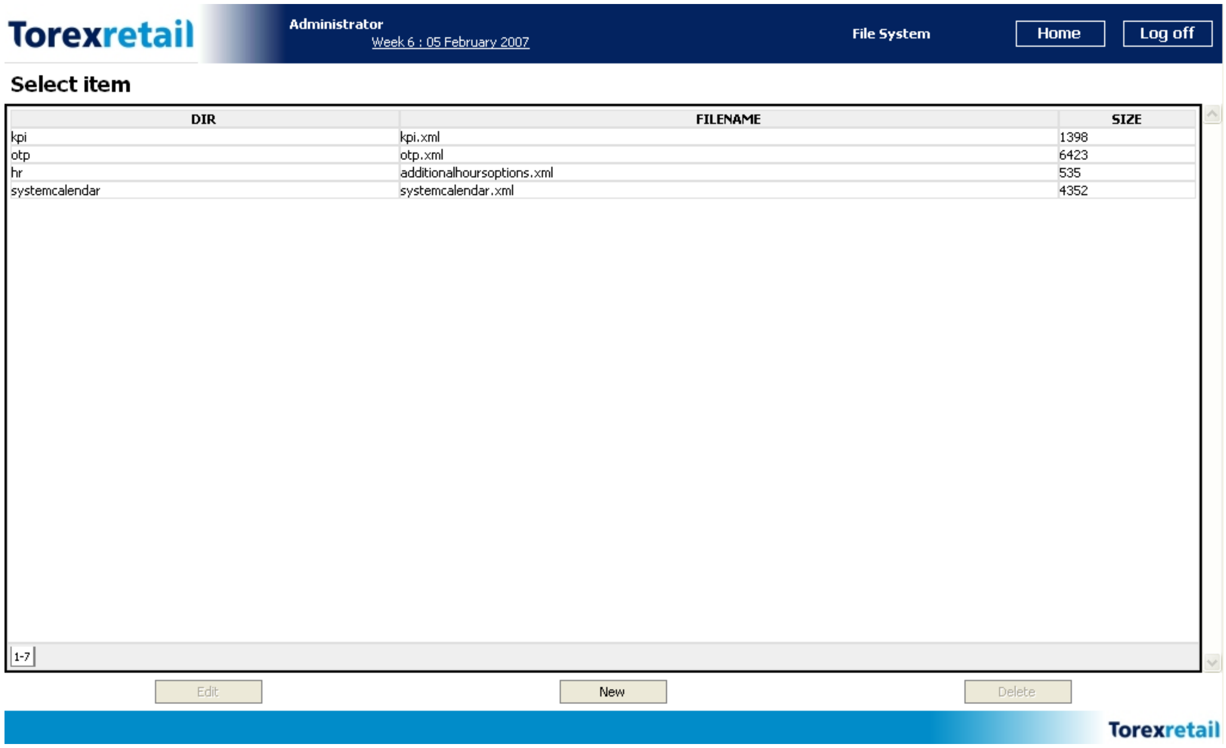
Record Locking Administration window

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

1. To view the File System screen, click 

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



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.

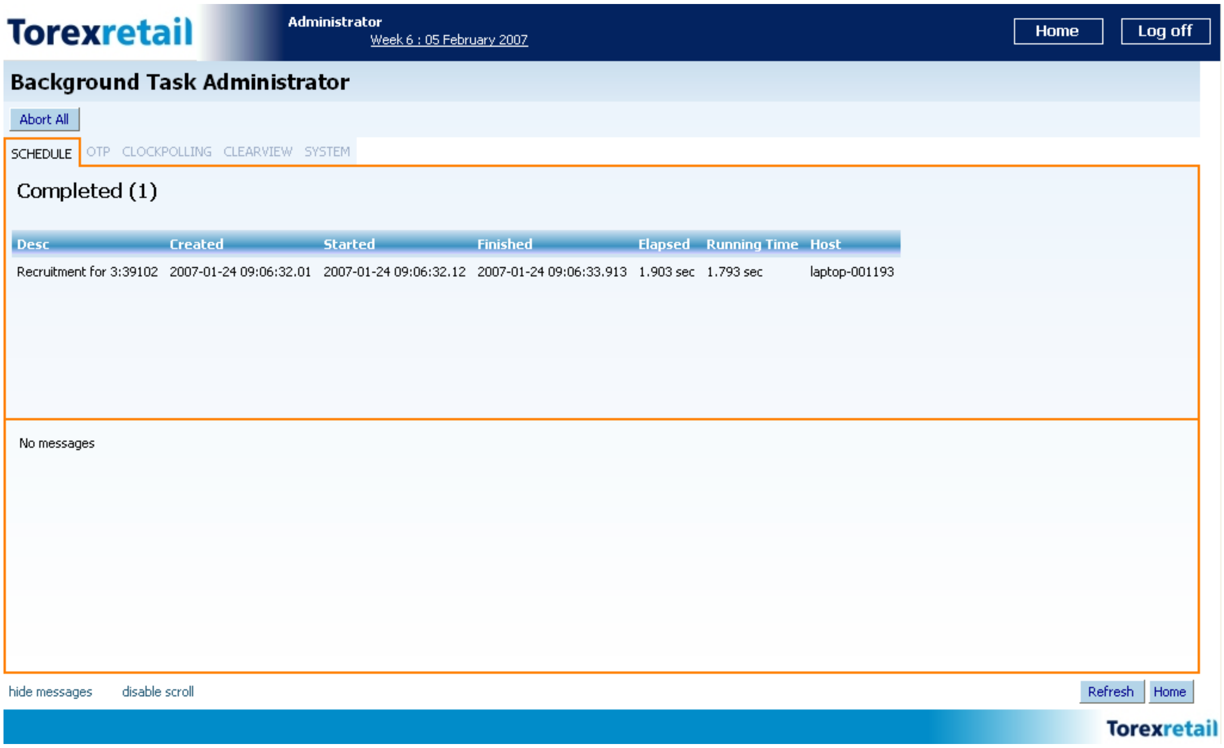
Delete a File

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

1. To view the Task Managers screen, click 

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



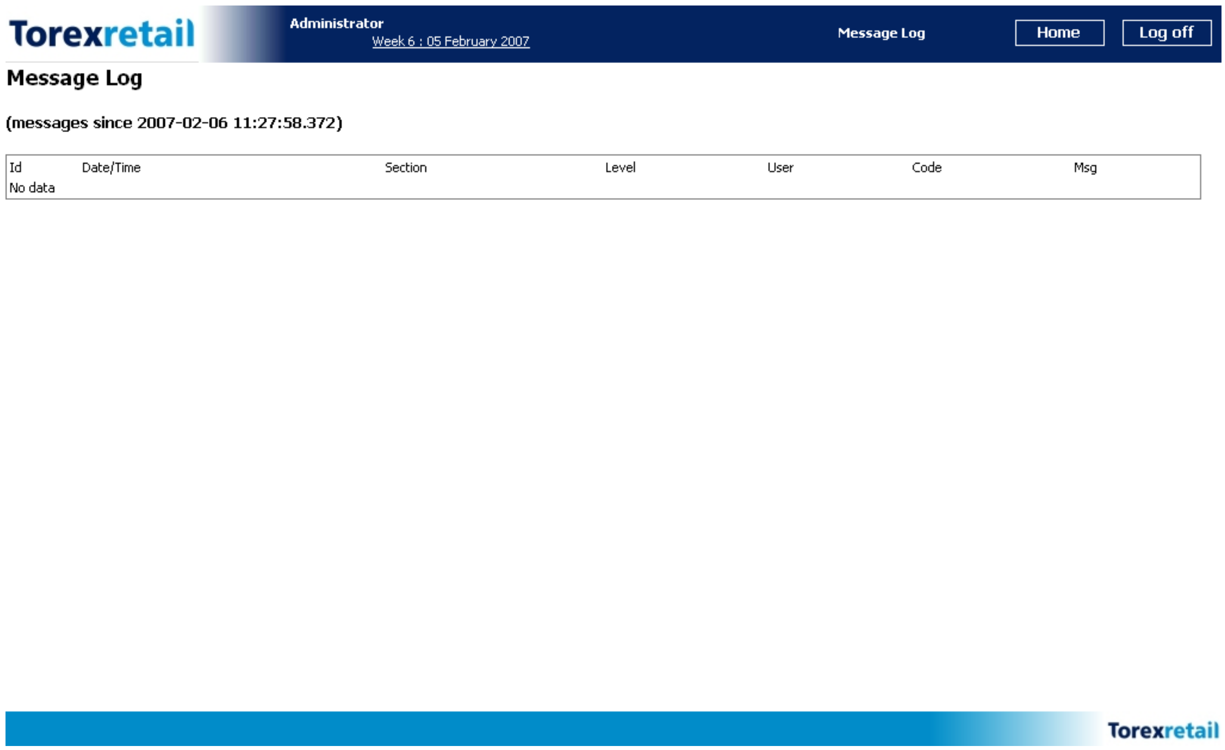
Background Task Administrator window

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

1. To view the Message Log screen, click 

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



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.

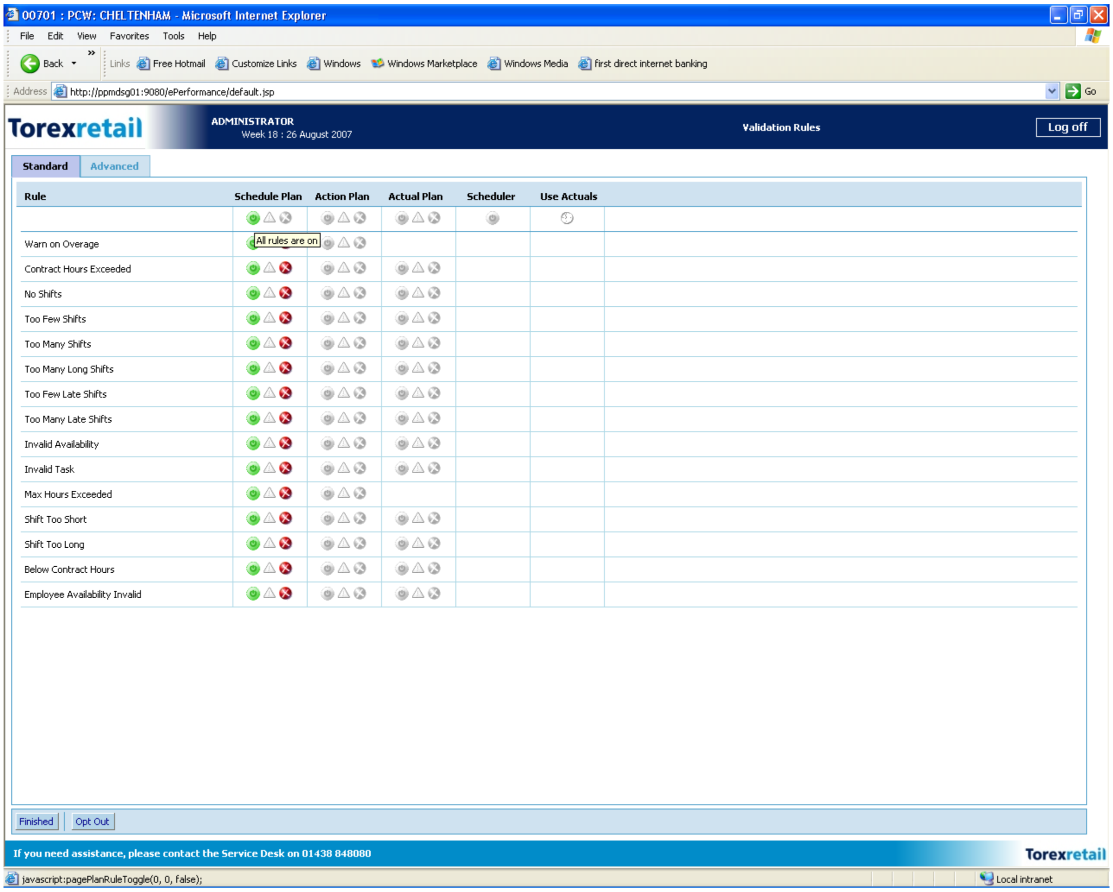
Select Fileset

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.



Standard Tab window

3. 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

4. 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.

5. To de-select, click button again.

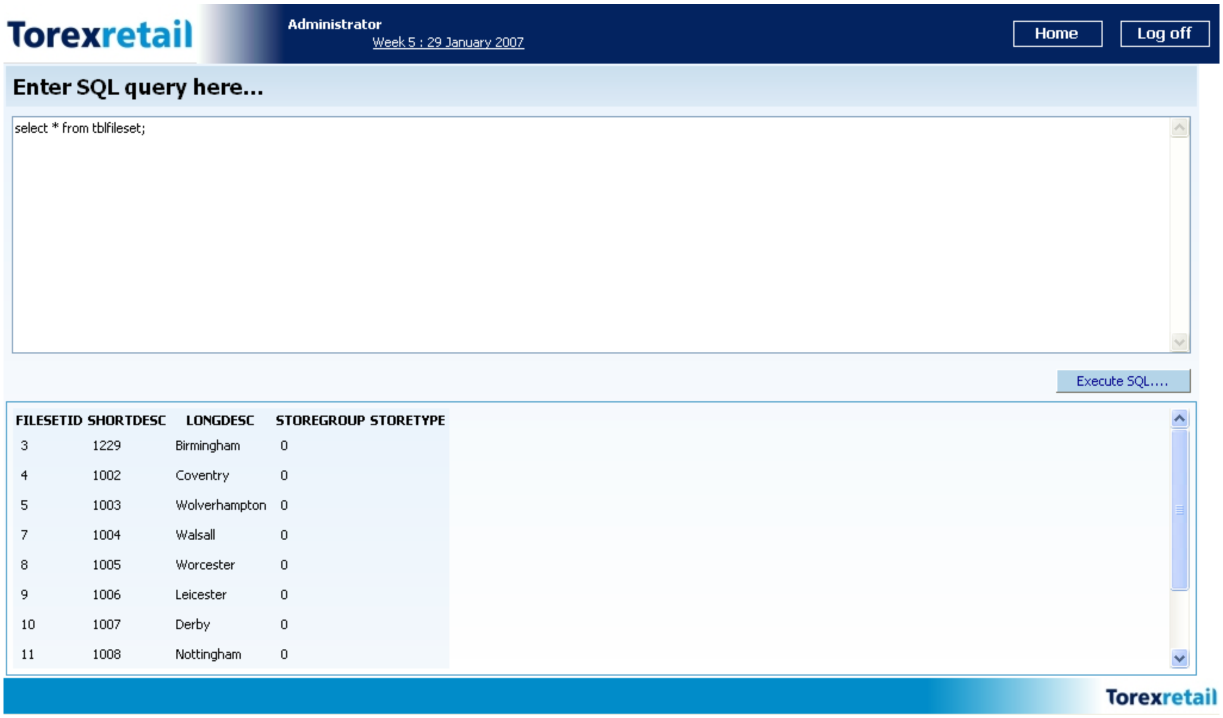
> **Note.** Individual rules can be switched on and others left off. It is advisable to configure the system in this way, so the user is not overloaded with alerts.

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.



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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