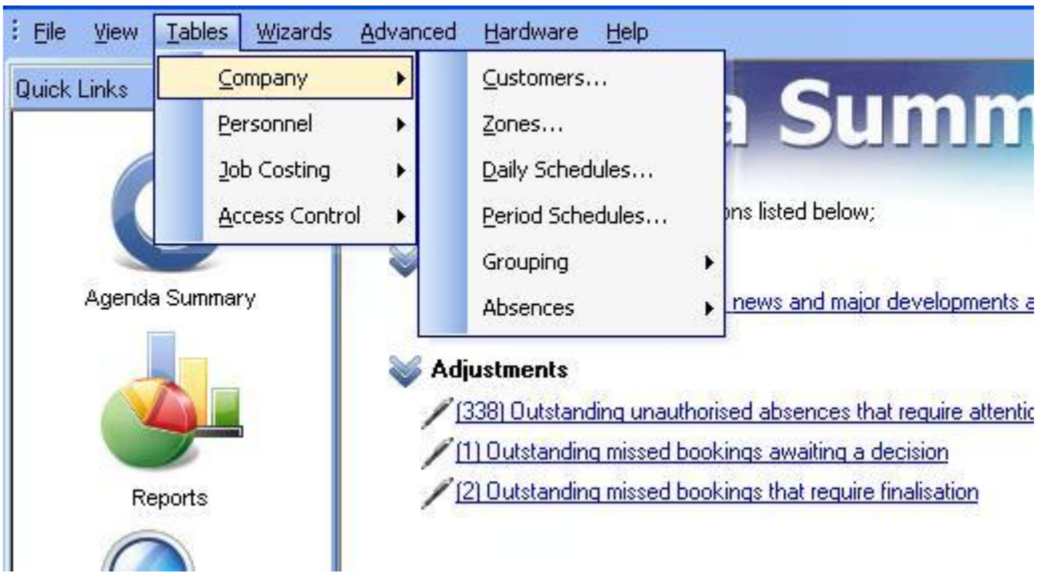
Module: m/01/501

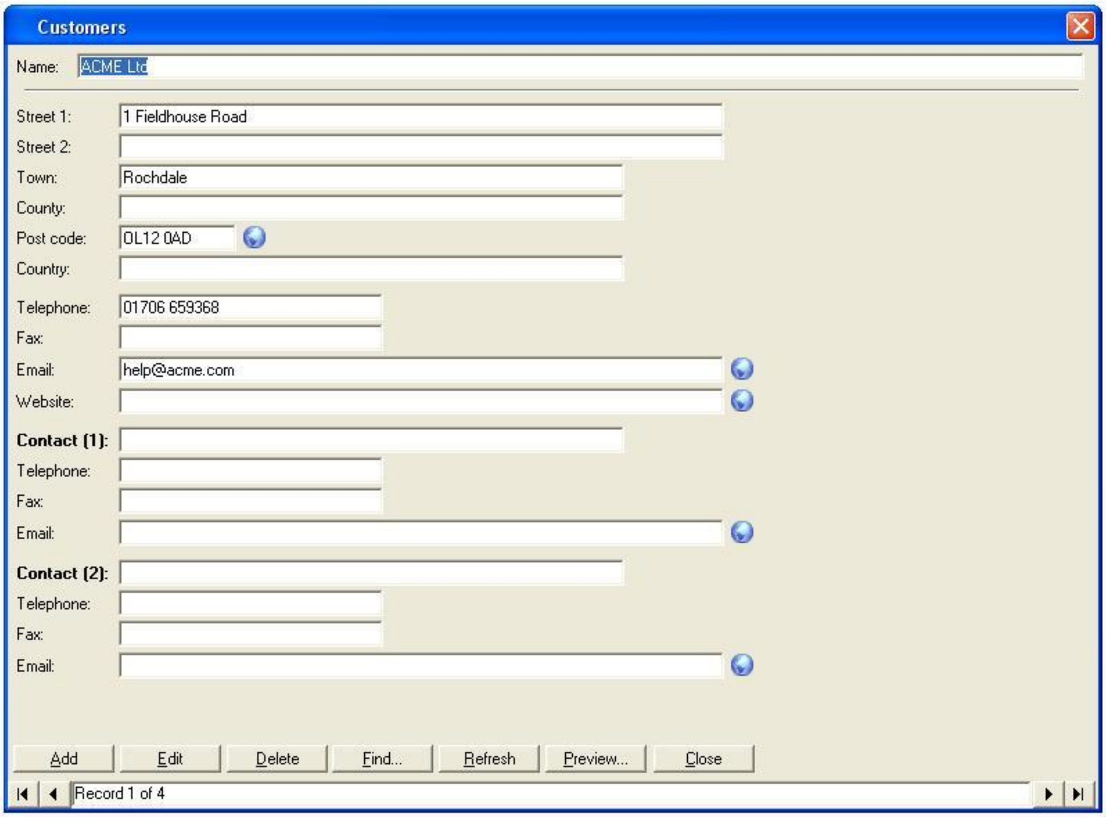
'Preparing your timeware® system: Company...'

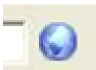
The following module should be completed for every timeware® installation.

1. To prepare timeware® Company settings, select the Tables menu then Company.



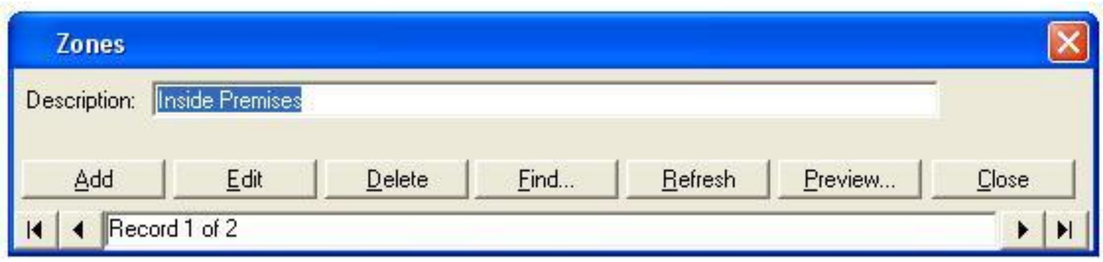
2. Select the Customers option from the menu. This is used to create customer references for the timeware® job costing options (timeware® 2012 onwards).



Clicking on the 'world' symbol,  allows the user to access the default email service or the Google Maps feature on the web.

Additional customers may be added by the user.

3. Use the Zone option to create descriptions of zones within your location. For example you may wish to create zones called Accounts, Marketing and Reception. Zones are used primarily for roll-call purposes.



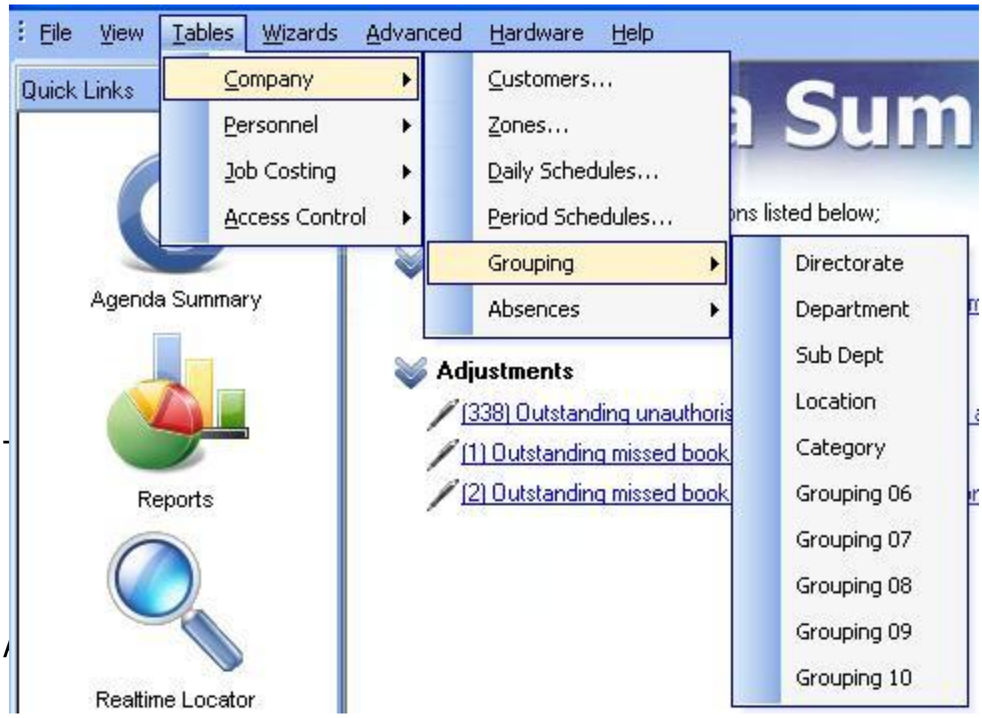
There are two pre-defined Zones:

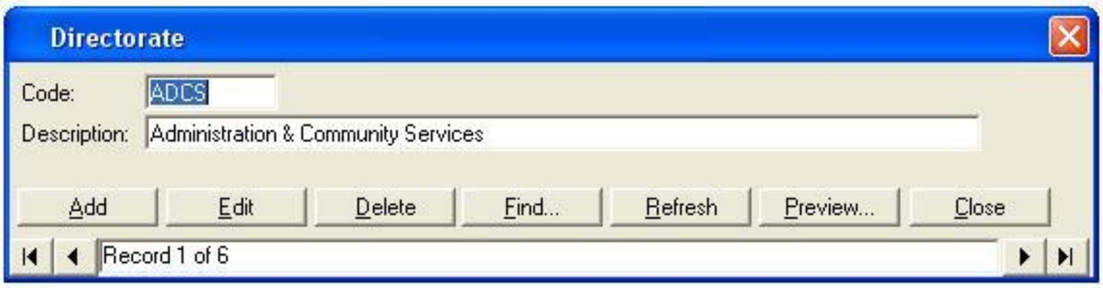
a. Inside the building
b. Outside the building

Additional zones may be added by the user.

Remember that the roll-call feature relies on zones therefore it is *not* recommended that the user deletes all of the zones.

4. Use the Grouping option to create descriptions of sub-groups within your previously defined grouping descriptions, (see advanced options, module m/01/0035). Groups are used for sorting and reporting.





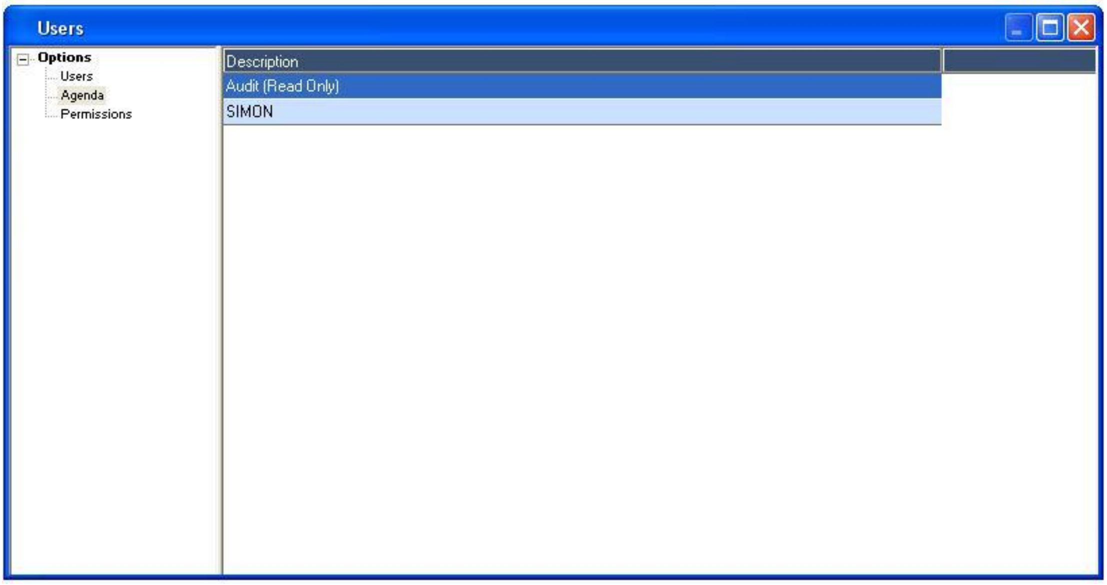
There are no pre-defined Groupings:

Additional sub-groups may be added by the user.

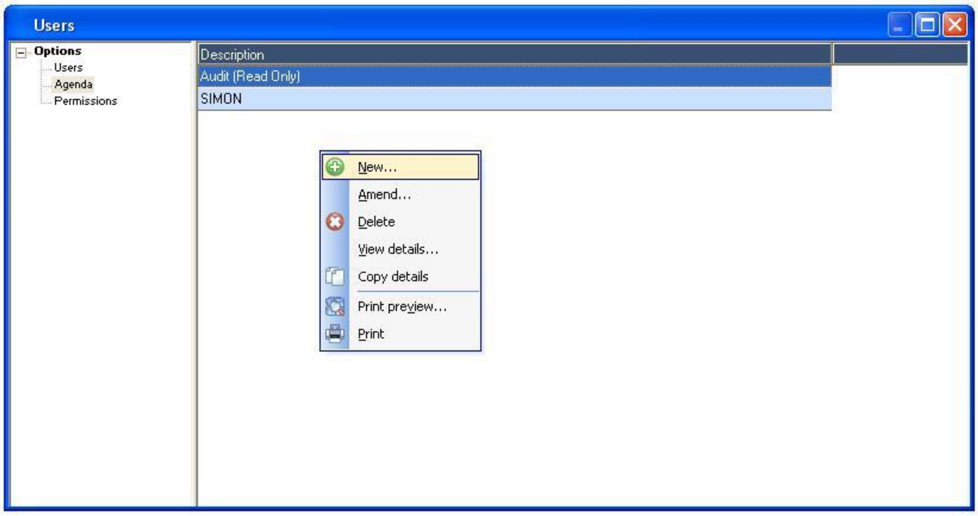
5. Next create User profiles. User profiles are required for each person allowed to use the timeware® software. This process requires Agendas and Permissions to be set correctly to determine the information that each User may view or be able to access.

   Select Advanced then click Users…

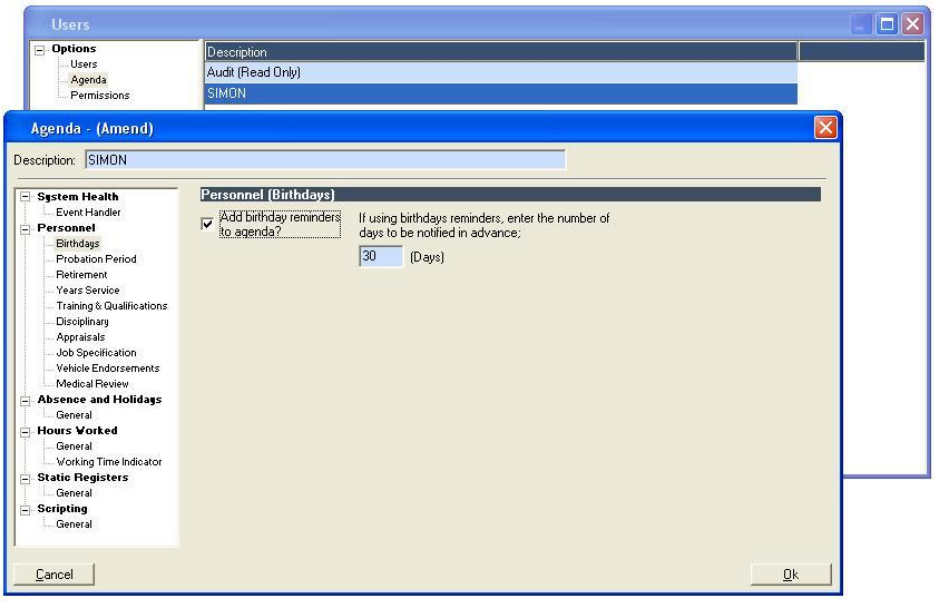
   The Users setup screen will appear.



To create a new agenda, select Options, Agenda. <Right-click> on the description grid and select New…

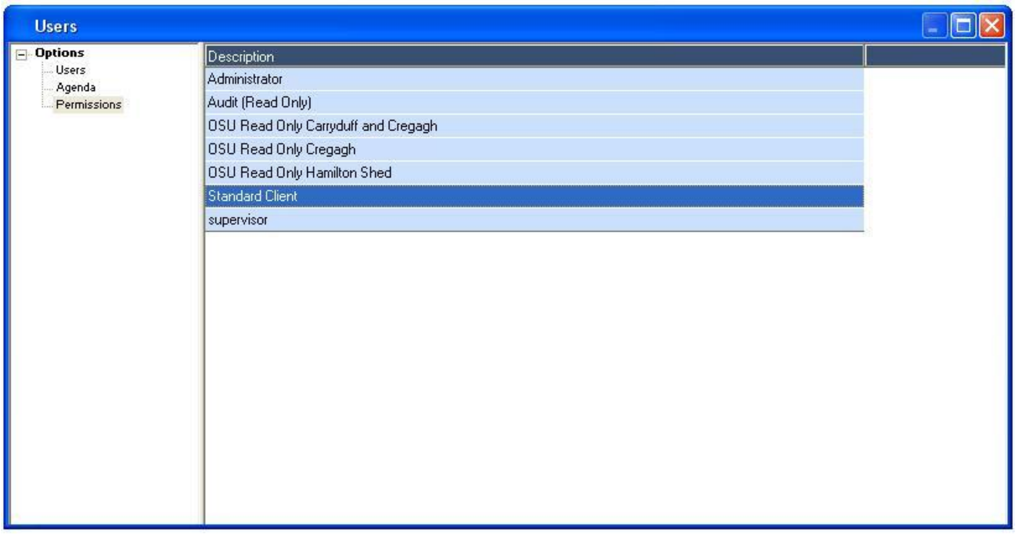


Move through the various headings on the left to determine whether they should be included in the User's agenda.

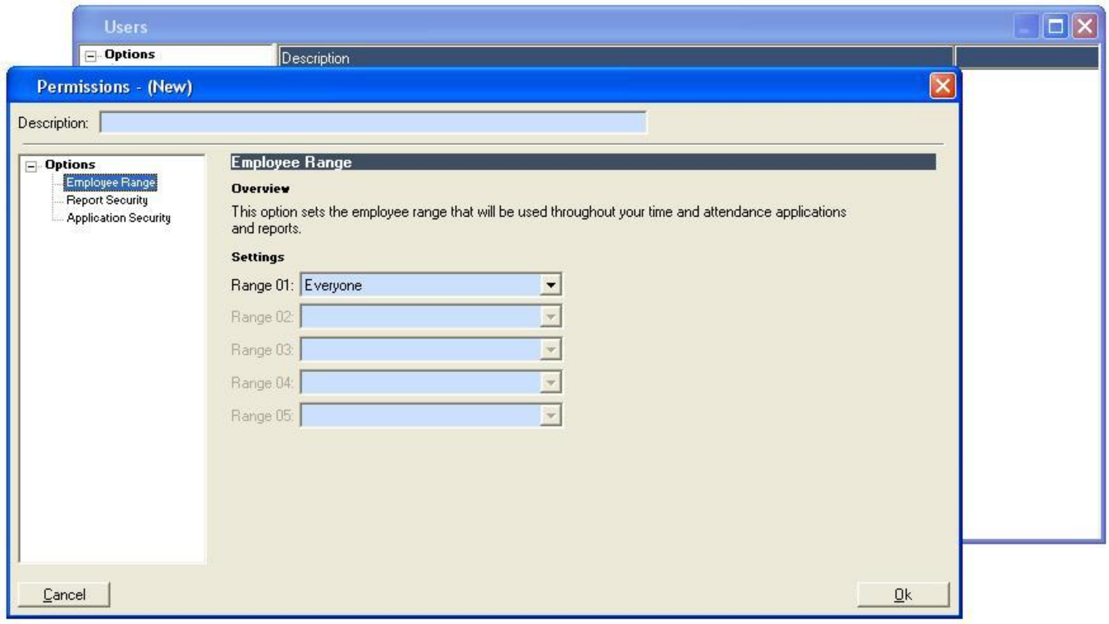


Finally, click <Ok> to save the new Agenda and return to the User screen.

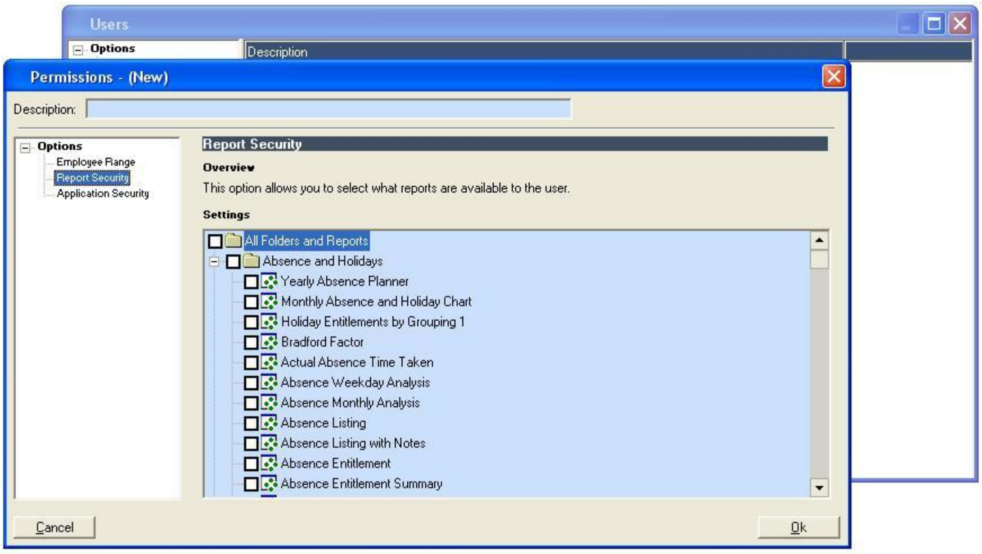
Next, create a Permissions profile for the User.



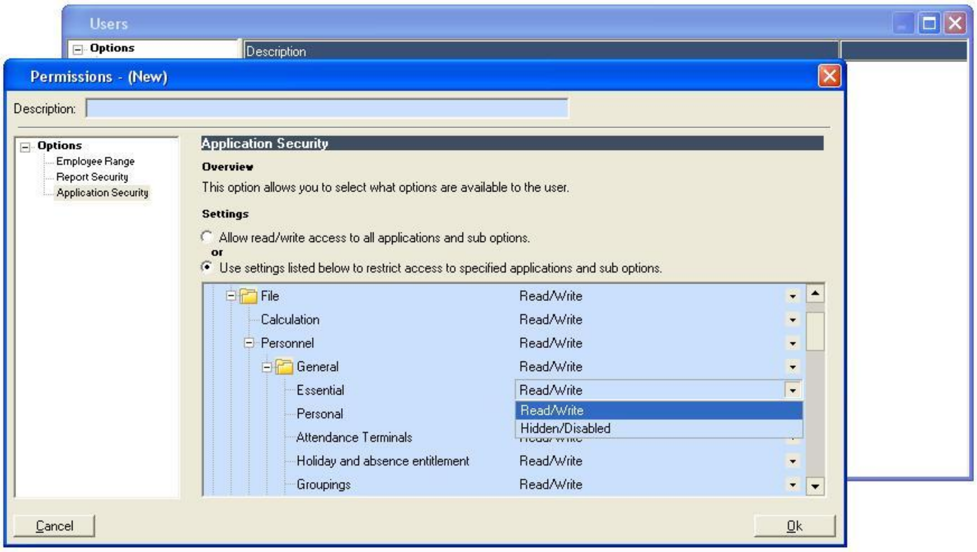
Select the Employee range that this user will be able to see.



Next, Select Report Security and select which reports the User can run.



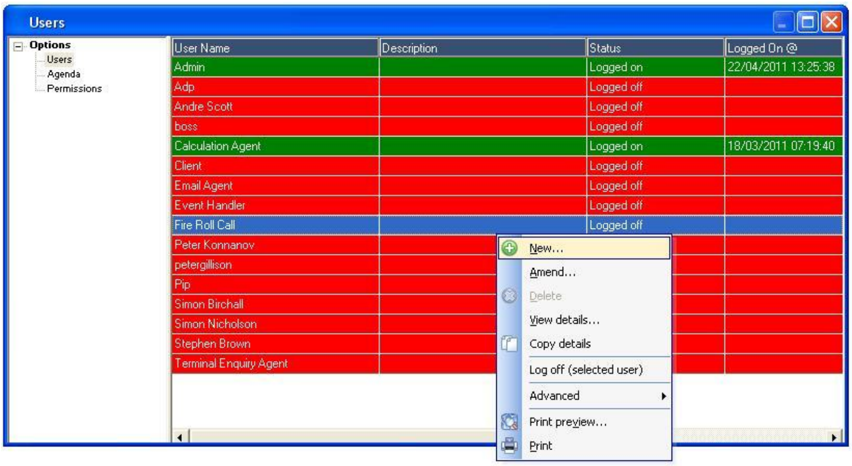
Finally, select Application security and specify which options the user may access and whether they have read/write or view only capabilities.



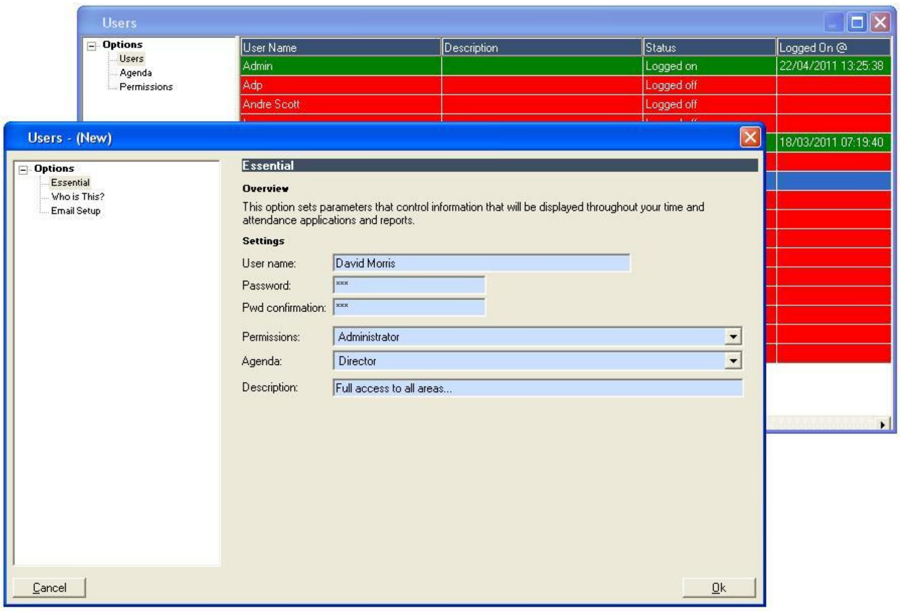
Finally, click <Ok> to save the new Permission and return to the User screen.

Now we create a new user and assign them the correct agenda and permissions profile.

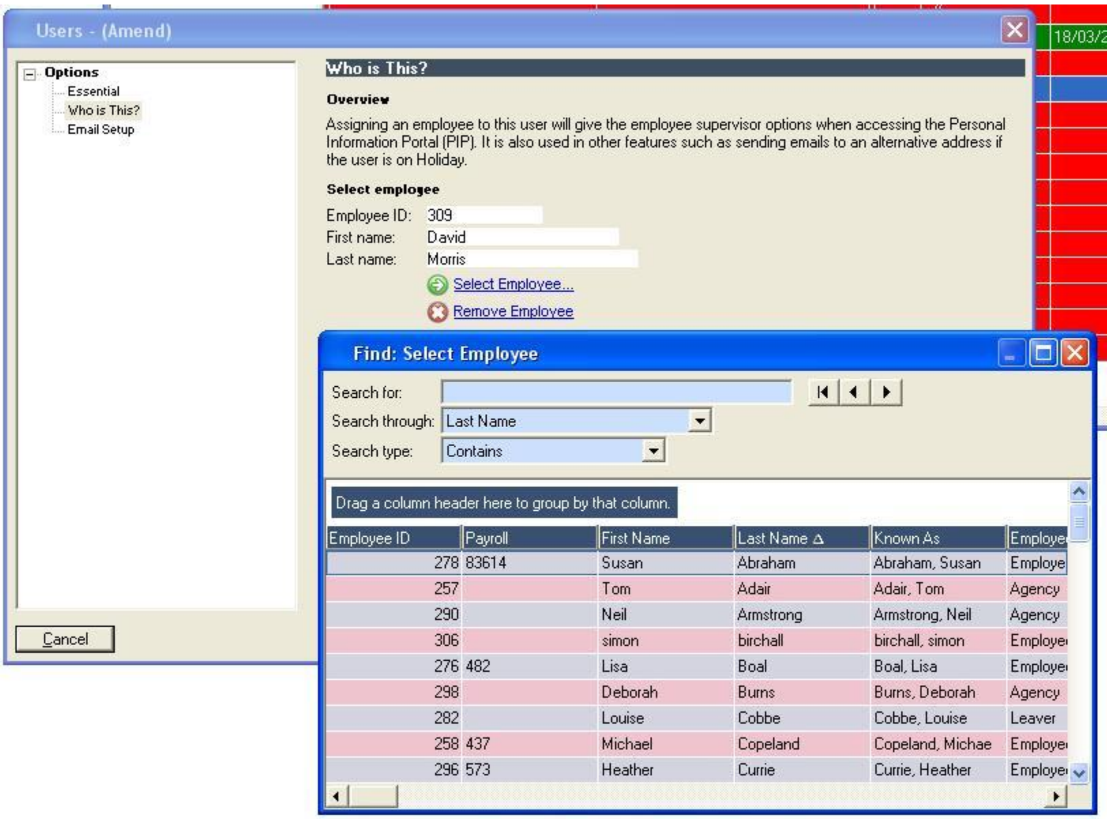
Select Users, <Right-click> on the grid and select New…



Next enter the Essential information including User Name and password (the details that are used when logging in). Now allocate a Permission policy, an Agenda and a brief description.

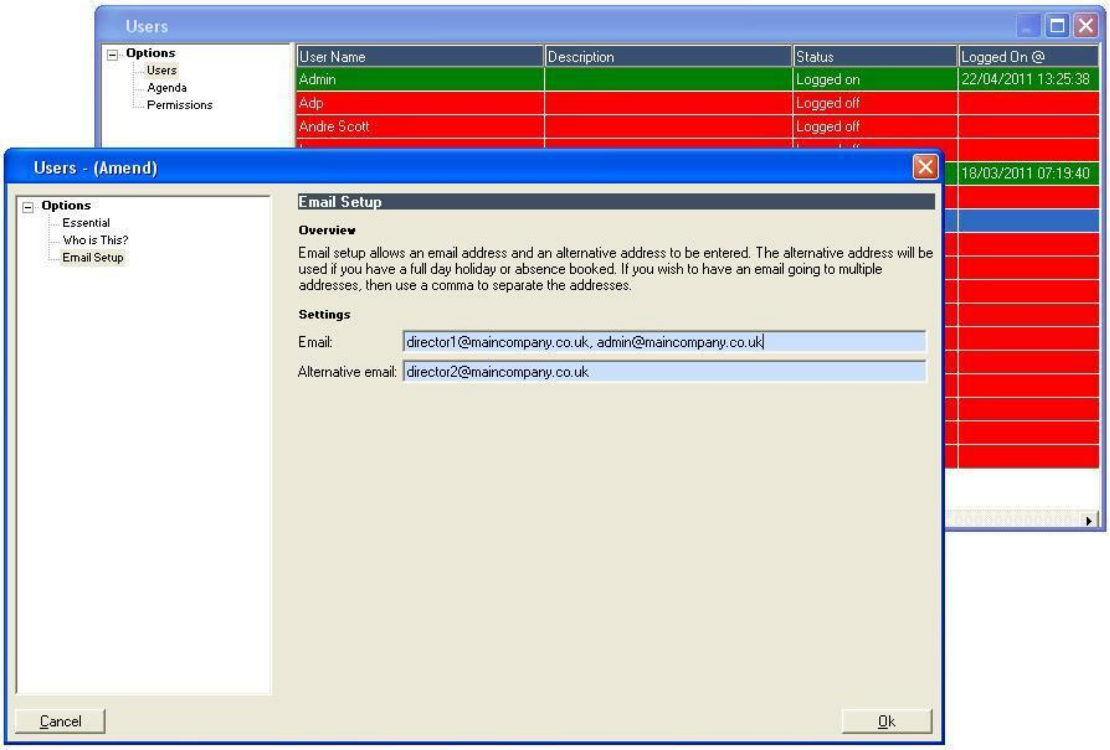


Next click ‘Who is This?’ and select the user from the personnel list. This process links the user to an person and is essential when creating PIP supervisors.



This process links the user to an person and is essential when creating PIP supervisors.

Select Option, Email Setup and enter an Email address (and alternative Email) for the User.



This process creates the addresses that are used by the system Email script.

Finally, select <Ok> to create the new User.

The new User will now be able to log into timeware®.

Notes