



Attendance Tracking System

Advanced Administrators Guide

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Introduction

This guide gives instructions on how to configure and customise the Attendance Tracking System (ATS). The guide details how to maintaining the system tables (companies, trades, cost codes, etc), bed adjustments, clearing old employee and visitor information, creating payroll extracts and maintaining the users (administrators) of the system.

We recommend that you read the [User and Administrators Guide](#) prior to reading this document. The User and Administrators Guide provides valuable information regarding the general uses of the system.

System Requirements

Server

ATS is based on Macromedia Coldfusion technology. In order to run the application, you will require a web server and a copy of Coldfusion version 4.5 or higher (for more information about Macromedia Coldfusion, minimum system requirements and the web servers supported please see <http://www.macromedia.com/>). As ATS is a database driven application you will also require Microsoft SQL 7 or higher (ATS will run on Microsoft Access but this is not recommended for larger installations). Your ATS installation is licensed by location and will be preconfigured with the initial location information presented when the application was licensed. If you need to change you license at any time please contact your sales representative or email sales@riversideweb.co.uk. For Installation, licensing and upgrading ATS please see the [Installation Guide](#).

Client

The system has been designed to run on workstations running Internet Explorer 4 or higher, Netscape Navigator 6 or higher. All processing is done at the server so workstations only need to be able to run the web browser. It is recommended that ATS is viewed at a resolution of 1024x768, 256 colours or higher due to the amount of data displayed. ATS will, however, work at lower resolutions although you will need to scroll the display in order to see all of the information.

System Administration

System Tables

This document describes how to create tables containing trades, positions (job titles), companies and cost codes (optional). The system is preconfigured with contract days (the number of days an individual should work throughout the year to fulfil their contractual obligations, defaults are 182 for a 2 weeks on/2 weeks off shift rota and 168 for a 2 weeks on/2 weeks off/2 weeks on/3 weeks off rota) and service days (defaults are 0 to 6). It also describes how to maintain administrators and system administrators as well as configuring the quick navigation toolbar and payroll extract.

In order to change system tables you must log in to ATS (please see the [User and Administrators Guide](#) for further information about the login procedure and how to change your password).

There is a special user called 'LocalAdmin' which can be used to maintain all system tables. This user has the highest level of user access to ATS. Initially the password is set to 'atsadmin01'. This password should be changed as soon as ATS is installed. This user should only be used to maintain system tables. Other users should be created for each of your system administrators with the appropriate level of security.

There are 4 key levels of System Administrator, the higher the level of administrator the more information you can change. When you select 'SYSTEM' from the ATS menu you will see a screen similar to the following:



On the left you see the System Administrators Menu bar. The options in this menu bar will depend on your level of access. When you click on an option the area on the right of the menu bar will display information related to the selected option.

Employee Code Tables

This option is available to system administrators with 'Basic Table Maintenance' privileges. This section controls the maintenance of the Trade, Position, Company and Cost Code pull down menus. These tables should be kept up to date and not be allowed to grow too large, if they become very large the screens on which the lists are displayed will take longer for the users to view.

Trade

Trade used as a way of grouping of positions. In the report you will see options to narrow down the view to a specific trade (for example Electrical), this trade will then be broken down into one or more positions (for example Electrician and Electrical Team Leader). If you click on the 'Trade Table' option you will see the following screen:

| Update Trade Table | |
|-----------------------|---------|
| Trade | Action |
| Additional Services ▼ | Delete |
| <input type="text"/> | Add New |

On the left you have a pull down list containing the existing contents of the trade list. You can select a trade from the list and press the delete button; the selected trade will then be deleted. If you try to delete a trade that is already in use by employees you will receive an error message informing you that the selected trade is used by a given number of people. At the bottom you have an empty box, if you wish to add a new trade, enter the name of the trade into the box and press 'Add New', the trade will then be added to the list.

Position

Position is a subdivision of trade, see above. If you click on the 'Position Table' option you will see the following screen:

| Update Position Table | | |
|-----------------------------|-----------------------|---------|
| Position | Trade | Action |
| Abs Elec - (Construction) ▼ | | Delete |
| <input type="text"/> | Additional Services ▼ | Add New |

Like the trade table, you have a pull down list containing the existing contents of the position list, next to the position, is the trade in brackets. You can select a position from the list and press the delete button; this will delete the selected trade. If you try to delete a trade that is already in use by employees you will receive an error message informing you that the selected trade is used by a given number of people. At the bottom you have an empty box, if you wish to add a new position, enter the name of the position and select the trade that it belongs to from the list and press 'Add New'. The position will then be added to the list.

Note: Each position can only have one trade. If you add a position with the same name as an existing position but change the trade, the trade of the original position will be ignored.

Company

The company table is a list to specify which company an individual works for. If you click on the 'Company Table' option you will see the following screen:

| Update Company Table | |
|----------------------|---------|
| Company | Action |
| A1 Safety training | Delete |
| <input type="text"/> | Add New |

On the left you have a pull down list containing the existing contents of the company list. You can select a company from the list and press the delete button; the selected company will then be deleted. If you try to delete a company that is already in use by employees you will receive an error message informing you that the selected company is used by a given number of people. At the bottom you have an empty box, if you wish to add a new company, enter the name of the company into the box and press 'Add New', the company will then be added to the list.

Tip: It is advisable to have some generic companies available (for example Self Employed, Other, Unknown), these can then be used for visitors should the required company not be in the list. This will save you from continuously adding companies that may only be used once.

Cost Code

The cost code table is used to maintain a list of cost codes. Each employee and visitor can be assigned a cost code so that you can track the days completed for each cost code. If you click on the 'Cost Code Table' option you will see the following screen:

| Update Costcode Table | |
|-----------------------|---------|
| Costcode | Action |
| CAM02ELEC | Delete |
| <input type="text"/> | Add New |

On the left you have a pull down list containing the existing contents of the cost code list. You can select a cost code from the list and press the delete button; the selected cost code will then be deleted. If you try to delete a cost code that is already in use by employees you will receive an error message informing you that the selected cost code is used by a given number of people. At the bottom you have an empty box, if you wish to add a new cost code, enter the name of the cost code into the box and press 'Add New', the cost code will then be added to the list

Add/Reserve Beds at a location

This option is available to system administrators with 'Basic Table Maintenance' privileges. This section allows you to control the number of beds at a location over a period of time. The number of beds may increase or decrease over time or you may wish to reserve beds by reducing the number available for a period and then remove the reservation later. If you click on the 'Adjust Beds' option you will see the following screen:

| Bed Adjustments for Leman 27A Update | | | | |
|--|------------------|-----------|---|---|
| From | Location | Beds | Notes | Action |
| 27/11/2003  | 27A | | |  |
| <u>15/03/03</u> | 27A | 70 | Cabin referb completed, beds returned to service |   |
| <u>05/03/03</u> | 27A | 67 | Return to normal operation |   |
| <u>24/12/02</u> | 27A | 47 | section shut down |   |
| <u>18/11/02</u> | 27A | 67 | Cabin Referbishment. Had to reserve 3 beds because one room is now out of use |   |
| <u>30/10/02</u> | 27A | 70 | New Containers added 11 new beds |   |
| <u>26/10/02</u> | 27A | 59 | Beds removed to create extra office space |   |
| Initial Value | 27A | 62 | | |

The title bar shows the location that the bed information relates to. To change the location, select the desired location from the menu and press update.

The bottom row of the bed adjustment screen shows the number of beds that were initially created when the location was added; this is denoted by 'Initial Value'.

If you wish to add a bed adjustment, simply enter the details into the top (yellow) row. You will require the start date (this is the first day that the new number of beds will be applied, this will remain for each day which following unless another bed adjustment is added), the location, the number of beds (between 0 and 999) and any notes you wish to record about the change. When complete press the  symbol to add the bed adjustment.

Each row between shows the numbers of beds that have been made available from the given start date, most recent first. The notes allow you to record information about the bed changes. You can click on the date or the  symbol to change the start date, the number of beds and/or notes. If you wish to delete the bed adjustment, click on the  symbol.

Purge/Restore Employees and Visitors

Access to this section requires a higher admin status than basic table maintenance; the system administrator must have basic table maintenance and purge/restore privileges. When an employee is deleted from ATS they are put into a holding area should their information and calendars be required again. You can use the 'Purge/Restore Employees' option to restore the employee back to a selected location or permanently remove them and their associated calendars, notes and bed overrides from ATS. Visitor cannot be deleted from the system unless they have never visited a location, in this instance their details can be removed permanently using the 'Purge Visitors' option.

Purge Visitors

Select this option to permanently remove visitors who have never made a visit. When you select the option you will be presented with the following screen:

| Purge Visitors | |
|---|--------|
| WARNING: Selected visitors and all associated visits will be permanently removed! | |
| Purge Visitors | Action |
| Lloyd, Harrold Scaffolder, A Smith, John Ss. 8 | Delete |

Click on the visitors you wish to purge (use the shift and click or control and click to select multiple visitors). When you have selected all those you wish to purge press the 'Delete' button. You will be asked to confirm and then all of the selected visitors will permanently be removed from ATS.

Purge/Restore Employees

Select this option to permanently remove employees or restore them to the selected location. When you select this option you will be presented with the following screen:

| Purge/Restore Employees | | |
|--|--|---------------------------------------|
| WARNING: Selected employees and all associated calendars will be permanently removed if your press delete! | | |
| Purge/Restore Employees | Restore to | Action |
| <ul style="list-style-type: none"> Baldwin. George (1399637) Barratt. Lee (235148) Bell. Andy (1380544) Bergland. Phil () Boston. Neil (1348476) Bowden. Paul () Boyes. Alan (1379249) Brandon. Andrew (607904) Burdon. David (1392159) Burgum. Tony (1390734) | <input type="button" value="Restore"/> to Leman 27A | <input type="button" value="Delete"/> |

Click on the employees you wish to purge or restore (use the shift and click or control and click to select multiple employees). Only employees deleted from ATS employees screen will be shown in this list, the employee ID number is shown in brackets next to the name to give additional confirmation.

When you have selected all those you wish to purge press the 'Delete' button. You will be asked to confirm and then all of the selected employees (and their associated calendars, notes and bed overrides) will permanently be removed from ATS.

If you wish to restore employees you must have selected a specific location from the location menu (see the users guide for more information on the location menu), **if you have 'All fields' or all locations in a field the restore option will not be available**. Press the restore button and the selected employees will be returned to that location (with their existing calendars, notes and bed overrides).

User Administration

User administration allows system administrators to create, maintain and delete administrators of the system. System Administrators must have the appropriate level of access in order to access the user administration option. If you have the required level of access you will see the following screen:

| User Administration | |
|---|---|
| User Name | Action |
| Blair Paul - (Admin User) ▼ | <input type="button" value="Edit"/> <input type="button" value="Delete"/> |
| <input type="button" value="Add New User"/> | |

The user names are listed in the pull down list. Those who have system administration privileges will have '(Admin User)' next to their names. If you wish to change a users details or password, select the required user and press the 'Edit' button. To delete a user, select the name from the list and press 'Delete'. To add a new user press the 'Add New User' button.

If you press 'Edit' or 'Add New User' you will see the following screen:

| User Administration | |
|--|--|
| Edit User | |
| User Name : | <input type="text" value="Bracewell, Gerry"/> |
| Password : | <input type="password" value="*****"/> |
| Password Again : | <input type="password" value="*****"/> |
| Site : | <input type="text" value="SBU"/> ▼ |
| Administrator (Update Data) : | <input checked="" type="checkbox"/> |
| System Admin (Table Maintenance) : | <input checked="" type="checkbox"/> <input type="text" value="All above plus User Admin"/> ▼ |
| <input type="button" value="Update User"/> <input type="button" value="Delete User"/> <input type="button" value="Reset"/> <input type="button" value="Cancel"/> | |

The first box shows the user name, this will be read only when editing a user or an empty box when adding a new user. When adding users it is recommended that you enter the last name followed by their first name, this makes the user list easier to navigate (although any format for usernames is accepted). You must then enter the users initial password; this has to be entered twice. You should inform the user that they should change their password when they initially enter the system.

The next box contains the users site or business unit. Your installation may have a single site location or multiple locations within a single database. Users can only administer a single site; this allows you to keep separate instances of ATS separate from each other within a database. Administrators are only allowed to add users within their own site. LocalAdmin is the only user which you can use to administer multiple sites.

Next you have the administrator option, this box should be checked for everyone who can update data in the system. This option is informational only at this point but will be implemented in later releases.

If users are to have access to the system administration options (any options within this document), you will need to check the 'System Admin (Table Maintenance) box. You can then select the level of access from the four options:

Basic Table Maintenance. This is the Trade, Position, Company and Cost Code tables along with the ability to adjust beds at a location.

All above plus Purge/Restore. Basic table maintenance plus purge/restore employees and purge visitors.

All above plus User Admin. The above two options and the ability to maintain employees.

All above plus Basic System Tables. All of the above options plus the ability to maintain, year, contract days, service days, the quick navigation bar and payroll extract.

Your user may not see the last option; if you have not been given the last option you will not be able to give it to others.

System Configuration Information

This section contains the tables that hold some of the core configuration information such as the number of years that can be accessed, the number of contract days, service days and the quick navigation bar.

Year Table

This table holds the years that are listed in any of the report or calendar screens. This table should include years from the first year that ATS is used and include at least 2 years into the future. By default this table will contain years from 2001 to 2008 but may require adding to as you continue to use ATS:

| Update Years Table | |
|----------------------|---------|
| Years | Action |
| 2001 | Delete |
| <input type="text"/> | Add New |

To add new years, enter the date and press 'Add New'. We recommend that you do not delete years from this table otherwise access to the year calendars will be disabled.

Contract Days Table

Contract days holds the default number of days an employee must complete to fulfil their contractual obligations. By default the system is configured with 168 days and 182 days. 168 corresponds to a 2 week on/2 week off/2 week on/3 week off style of rota and 182 to a 2 week on 2 week off style of rota. You can add other contract days to the system using the following screen:

| Update Contract Days Table | |
|----------------------------|---------|
| Contract Days | Action |
| 168 | Delete |
| <input type="text"/> | Add New |

Service Days Table

This table contains the number of service days allowed, the default range provided is 0 to 6 days, you can change this to be any day range required using the following screen:

| Update Service Days Table | |
|--------------------------------|--|
| Service Days | Action |
| <input type="text" value="0"/> | <input type="button" value="Delete"/> |
| <input type="text"/> | <input type="button" value="Add New"/> |

Quick Navigation Toolbar

This allows you to control the contents of the navigation bar that appears at the top right of all ATS screens. This toolbar allows users of ATS to quickly jump to other web sites or web applications:



By default this toolbar is empty and will only display 'Other Sites/Applications'. You can use this option to add other locations to this toolbar:

| Update Quick Nav Bar Table | | |
|---|---|--|
| Quick Nav Bar | Path | Action |
| <input type="text" value="NUI Planning System - (http://127.0.0.1/ippss/182/nuiplanning)"/> | <input type="text" value="http://127.0.0.1/ippss/182/nuiplanning"/> | <input type="button" value="Delete"/> |
| <input type="text"/> | <input type="text"/> | <input type="button" value="Add New"/> |

To add a site, enter the site name or description in the box below 'Quick Nav Bar' and the full path name in the box below 'Path' and press 'Add New'. If you then refresh ATS you will see the new entry in the Quick Navigation Toolbar. For Example, you may wish to add your home page, enter the description as 'Company Home Page' and path as 'http://www.yourdomain.com/'.

Tip: If you are using the NUI Planning System (a bolt on module to ATS) you should add the path to both ATS and the NUI Planning System. This will allow users to quickly jump between the two applications.

You can delete a site at anytime by selecting the name and pressing delete.

Payroll Extract

The payroll extract allows you to extract extra payment days for a given month and put them into a comma-separated file to be imported into your payroll system. By Default the codes are mapped in the following way:

| ATS Code | HR/Payroll Code |
|---|-----------------|
| DO – Delayed offshore/Call back | DCB |
| ER – Employee Representation (Additional Pay) | OM |
| OD – Onshore/Office Day (Additional Pay) | OM |
| PO – Partial Offshore Delay | PDO |
| SE – Service Day Encashment | SDE |
| SR – Safety Representation (Additional Pay) | OM |
| TR – Training (Additional Pay) | TDA |

When you select 'Run/email Payroll Extract' you will be presented with the following screen:

Payroll Extract

Extract Date :

Company :

Mail to :

Mail from :

The payroll extract date is the month that you would like the information extracted. It does not matter which day within the month you select, it is the month and year that is important. For example, if you select 01/06/2003 ATS will extract payroll information for the whole of June 2003.

Company specifies which company you wish to extract information about. Although there may be many companies in the system you will probably only wish to extract information about those in a specific company. Select the required company from the list.

'Extract Only' will extract the payroll information into a file called PAYEXT.CSV in a directory called EXTRACT under your ATS application directory. **Note:** The user who runs the payroll extract must be able to write to this directory otherwise the extract will fail, please ensure you have sufficient rights to run this option.

If the extract is successful you will see the following message:

Payroll Extract

Payroll extract file created....

[View Payroll Extract File](#)

[View Payroll Extract Log](#)

You can use the 'View Payroll Extract File' and 'View Payroll Extract Log' links to view the files created. The PAYEXT.CSV file will look similar to the following:

| | A | B | C | D | E | F | G | H |
|---|--------|---------------|-----|----|-----|-----|-----|--------|
| 1 | HRID | Name | DCB | OM | PDO | SDE | TDA | Nov-02 |
| 2 | 232143 | Eileen Allan | 0 | 16 | 0 | 0 | 0 | |
| 3 | 213143 | Adam Ant | 0 | 0 | 0 | 1 | 0 | |
| 4 | 322332 | Cindy Assen | 0 | 16 | 0 | 0 | 0 | |
| 5 | 32321 | Steve Barclay | 0 | 16 | 0 | 0 | 0 | |

You will see a row for each employee who has qualified for additional pay. The rows will detail their HR/Payroll ID, Name and the number of days in the month for each code.

The payroll extract log file is called PAYEXT.LOG and is also located in the EXTRACT directory with the payroll extract file. This is a text file that contains a date and time stamp of each time the payroll extract has been executed and whether it was successful.

If you wish to send the payroll extract directly to another individual you can enter their email address and your email address and press 'Extract and Mail'. This will perform the process as defined above but also send the PAYEXT.CSV file to the selected email address.

If you wish to run the payroll extract on a regular basis, for example every month, Coldfusion allows you to automate this process using its inbuilt scheduler. For information on automating the payroll extract please see the [Automated Payroll Extract](#) document.

System Code Administration

System Code Administration allows you to maintain the system codes used by ATS. This option should be used with extreme caution; it can seriously affect the way that ATS operates, you should only use this option where advised to by your vendor or Riverside support. This section allows you to change the codes and descriptions of the system codes, the code colour, how the code is used to calculate days worked. The initial screen looks like the following:

Select the code you wish to edit or enter a new code to add and you will be presented with the following screen:

Each of the fields in the screen are detailed below:

System Code. This is the actual system code; the code may be up to 5 characters but ideally should be kept to 2 or 3.

Description. This describes the system code; it is the full name of the code and will be displayed next to the code in the keys and calendar screens.

Code Group Classification. This is used to group the code into a group of similar codes for use in the year summary report screens.

Help Notes. These are additional notes about the code that will be displayed when 'show full key' is pressed or the cursor is hovered over the system code/description in the calendar screens.

Payroll/HR Code. This is the code that the system code is mapped to when the payroll extract runs. This allows you to convert ATS codes to the codes used by your payroll system. If left blank the payroll extract will ignore the code. If several ATS codes are mapped to the same payroll code, the ATS codes will be merged when the payroll extract runs.

Onshore. This defines whether the code is defined as onshore or offshore, this is used when ATS has to calculate personnel movements.

Hide detail when read only. This is used to hide the code from users who are not logged into ATS. This is used to stop people from seeing sensitive codes such as compassionate or suspension information. If a code is hidden when read only, users will not see the code or any notes attached to the code, they will just see 'Other'.

Counts towards predicted days. This is used to flag codes that are used to calculate contract (predicted) days. If an individual uses a code flagged as this the each day will be added to their contract (predicted) days. In the calendar screens these days are denoted with a superscript 1 – (¹).

Day worked. This is used to flag days that are worked. This will add to the 'total days worked' in the calendar screens. This allows the code to be differentiated from codes which represent unpaid or holiday codes.

Colour. You can select which colour you wish the code to be displayed in.

Yellow Threshold. This is used to put a limit onto a code at which point the code will be highlighted in yellow as an initial warning. This is used to bring attention to codes that are excessively used such as office assignments or absence.

Red Threshold. This is used to put a limit onto a code at which point the code will be highlighted in red as a final warning. This is used to bring attention to codes that are excessively used such as office assignments or absence.