**Technician Pre-Installation Notes for COMPANY NAME**

## timeware® Software Installation

1. **Server:**
   1. What is the name and IP information of the server?

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* 1. Server specification, please reference t2-0410 - timeware® Professional I.T system requirements if needed and advise what we require.

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1. **Application**:
   1. What drive of the server will the timeware® software be installed on?

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* 1. How many timeware® software clients will need to be installed?

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1. Users:
   1. How many users will require access to the timeware® software?
      1. Usernames:

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* + 1. Permissions:

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* + 1. Email Addresses:

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1. SQL Server:
   1. What is the name & IP Information of this server?

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1. **SQL Application:**
   1. What drive of the server will the SQL software will be installed on?

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* 1. What version of SQL are we going to install? (2014 or newer)

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1. **Backup Server:** 
   1. What is the name and IP information of the server?

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* 1. Will the timeware® backup always replace the existing or will it be separated into a daily individual folder?

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* 1. What times will the backup run?

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## Bio Enrolment

* + - 1. How many employees require enrolment?

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* + - 1. What are the various shift patterns that are worked?

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* + - 1. What are the languages of staff that are employed?

*(English, Hungarian, Polish, Ukrainian, Romanian, Urdu, Punjabi, Latvian, Armenian language cards are available, this lists all required information for the reason of enrolment).*

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* + - 1. Where will the enrolment take place?

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* + - 1. Are you able to provide an enrolment schedule?

*(This is usually a list of names that will attend at different points in the day, possibly departmental order)?*

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## Hardware Installation

1. Discuss the hardware that will be installed (reference information attached to Wrike task):
   1. Type of Hardware:

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* 1. Description:

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* 1. IP Address:

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* 1. Subnet Mask:

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* 1. Gateway:

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1. Confirmed location of devices? (request pictures of the locations)
2. Confirmed location of fused spurs?

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1. Confirmed location of network ports?

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1. Will people use a 3rd party proximity card or fob with the timeware® equipment?

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## Project Build

1. Personnel
   1. Who is the contact for the day to day running of the Personnel module?

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* 1. Do we require to import personnel data from another system into timeware® and if so, identify and document the data type and format?

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* 1. Personnel Subheadings reminder, how much of this would they like to use:

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* + 1. Personal e.g. Date of birth, contact details, marital status etc.

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* + 1. Employment (This is required for GDPR functionality)

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* + 1. Appraisal

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* + 1. Training

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* + 1. Qualifications

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* + 1. Education

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* + 1. Disciplinary records

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* + 1. Accident book

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* + 1. Documents

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* + 1. Health

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* + 1. GDPR

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* + 1. Working time regulation (WTR)

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* + 1. Groupings: Specify the ten main groupings:

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1. Any user defined fields to be imported that are not listed above.

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1. Are period schedules required, if so. What schedules are required?

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1. Are Terminal policies required?

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1. Is an Email Policy required?

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1. Is a remuneration Policy Required?

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1. Is a payroll number required and if so, does the payroll number need to be unique?

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1. Can we save an employee with the employment status “Newly added”?

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1. Are we setting a default person status, email policy, remuneration policy etc?

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1. How many number of employees?

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# Project Build – ESS GO

1. Please Reference [ESS GO Technical Datasheet](https://www.nmd3.com/repository/N2-0102-ESS-GO-technical-datasheet.pdf) if customer using ESS GO.
   1. Make sure customer is aware that phone numbers and emails need to be filled out in the personnel section. If import is needed, please refer to the Import spreadsheet.
   2. ESS Go Policy:
      1. Is ‘Attendance Point Booking’ required for using at the PUCK?

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* + 1. Is ‘View Attendance timesheet needed, if so,
       1. Do we need to display absences and holidays as well as the ‘note’

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* + - 1. Do we need to display rates?

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* + 1. Is Shift Rota to be activated so that the next 31 days planned shifts can be seen?

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* + 1. Are employees able to book leave? E.g. Holiday, Sickness etc.

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* + 1. Are employees able to use the Attendance Offsite Booking, using GPS location.

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* + - 1. Is authorisation required for this? (Team leader/Manager) needs to approve this GPS Booking on the To-Do List.

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Is the employee required to leave a comment when using this feature?

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# Project Build – Absence Management

* + - 1. Will the customer be using timeware® to monitor people’s Absence Management?

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* + - 1. Who is the contact for the day to day running of the timeware® absence management?

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* + - 1. Is an absence entitlement policy required, if so:
  1. Hours and Minutes or Days?

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* 1. Renewal type:
     1. Fixed (dd/mm). E.g. 1st January.

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* + 1. Person Start date (dd/mm)

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* + 1. List the different policies needed. E.g. 30 Days, 28 Days…

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* + 1. Categories:
       1. Holiday, Sickness, Medical, Authorised, unauthorised, Compassionate, Maternity/Paternity, Business Absence, Educational / Training & Time in Lieu. These are our categories as standard. Does the customer require any of these changes, or any removing as not needed.

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* + 1. Does the customer allow carry over for any of the categories and if so, detail maximum amount allowed below.

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Are employees entitled to years’ service, e.g. after 5 years worked X amount of entitlement awarded:

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* + - 1. Do you wish to use the Bradford factor? If yes: Which categories, do you wish to report on? What threshold should display an amber warning? What threshold should display a red warning?

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* + - 1. Entitlement Information
         1. Do you wish to display absence entitlement information? If yes, which categories do you wish to display information for? Do you wish to stop a booking if there is not enough entitlement remaining? If yes, which categories should this be active for?

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* + - * 1. Do you wish to display Tactical absence information? If yes: Do you wish to display declined absences?

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* + - * 1. Do you wish to report on Bank Holiday abuse? If yes, which categories should be included for abuse checks?

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* + - * 1. Do you wish to check for events surrounding an absence? These events are stored in a spreadsheet. If yes, which categories should be included when checking?

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* + - * 1. Do you wish to check for absences surrounding the employee’s birthday? If yes, which categories should be included when checking?

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* + - 1. Rolling Absence:
         1. Do you wish to display absence statistics in a rolling period? If yes, how long is this period, in months? What categories should be included in this rolling period?

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* + - 1. Entitlement Forecast
         1. Do you wish to display information regarding an employee’s entitlement forecast? (This is used to alert the user if the employee has a certain amount of absence entitlement remaining at certain points in the entitlement year. If yes: What categories should be displayed?

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* + - * 1. How many months through the entitlement year should the first check be made?

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* + - * 1. How much entitlement remaining, as a percentage, would trigger an amber alert?

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* + - * 1. How much would trigger a red alert?

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* + - * 1. How many months through the entitlement year should the second check be made?

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* + - 1. What Absence reasons are required.

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* + - 1. RTW procedure – Does the customer require return to work emails setting up?
         1. If yes, does the customer require a custom document or use our standard timeware document?

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* + - * 1. What Absence reasons does this need to trigger for?

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* + - * 1. How long after returning should this trigger?

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# Project Build – Attendance

1. Will the customer be using timeware® to monitor people’s attendance?

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1. Who will be responsible for supplying the work patterns and overtime rule information to the timeware® technician?

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1. Will users like a reminder on their To-Do list showing employees that are currently missing from schedule?

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1. Will users like a reminder on their To-Do list showing employees that were late (core time infringements) for work?

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1. Will users like a reminder on their To-Do list authorise pre/post overtime?

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1. Will users like Bookings awaiting decision to be shown on the To-Do list (if using ESS GO)

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* 1. If yes, would the customer like to activate 2 tier authorisation?

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1. How long would the customer like this to show on the To-Do list? Standard is a rolling 30-day period.

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# Project Build – Access Control

1. Will timeware® be used to control employees access?

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* 1. If yes, which integration is being used?

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* 1. What information are we required to bring into timeware®?
     1. Device Names

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* + 1. Access Patterns (BioStar 2 Only)

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* + 1. Customer will need to provide an admin login account (NET2 OR Genetec only)

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# Project Build – Fire Alarm Roll Call

1. Will the customer be using the timeware® fire alarm roll-call link?

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* 1. If yes, which company supplies the fire monitoring system?

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* 1. If yes, is the customer aware additional hardware is needed or has the customer bought additional hardware?

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1. Who will be the point of contact for any fire alarm queries?

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1. Email addresses of contacts that will be receiving the Roll Call Report

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1. Does the customer require the roll call to automatically print?
   1. If yes, what are the names & IPs of printers where the Roll Call needs to print from

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* 1. Customer needs to be aware that a service account is needed (login details to be provided) that can access these printers.

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# Project Build – Reports/ Exports

1. Does the customer have existing reports which we will need to replicate?
   1. If yes, can the customer provide examples?

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* 1. If yes, does the report need to match customers’ existing report exactly?
     1. If no, then explain we can produce similar results in our Dashboard and report Viewer.

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1. Does the customer have existing exports which we will need to replicate?

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* 1. If yes, can the customer provide examples?

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* 1. If yes, does the export need to match customers’ existing export exactly?

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* + 1. If yes, we will need to verify and create a customisation form on how this export works and send off to programming for development (make customer aware possibility of a cost, dependant on complexity & if already been discussed, then there is no additional cost)

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# Project Build – Dashboards

1. Would the customer like any dashboards configuring?

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* 1. If yes, detail which dashboards will need configuring.

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# Payroll Integration

1. Will the customer be using payroll integration?

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* 1. If yes, please specify the name and version of payroll software.

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* 1. Who will be the point of contact when configuring the payroll integration?

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* 1. When you create a new starter in payroll, would you like them to be automatically created in timeware®?

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* 1. When you create a new starter in timeware®, would you like them to be automatically created in payroll?

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* 1. How frequently is payroll being ran?

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# Project Commissioning

* Customer to provide a workspace for the technician for the duration of the project build
  + Technician will need access to the server via technician’s laptop (internet access to be provided and remote desktop details) if this is not viable, a workstation to be provided by the customer, with connection to the server enabled & configured.
* Who are the main contacts our technician will need to speak to
  + Project leader (for clarification purposes).

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* + HR (company procedure queries).

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* + IT (for infrastructure queries, access to server/client machines & admin privileges).

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* + Payroll (for general setup queries)

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# User Training

1. Is the training going to be on-site or remote via teams?

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* 1. If on-site, where will the training be held?

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* 1. If on-site, TV / Projector & server access will be required.

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1. Type of training being provided
   1. Operator / Line Manager Training

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* 1. What modules are going to be covered in this training?

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* 1. Who needs to attend this training?

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1. Create training plan with the customer
   1. Dates training can be held.

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* 1. Times the training can be held.

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# Post Installation Meeting

The customer will be contacted to arrange a meeting via Microsoft Teams or another video conferencing platform. During the meeting, we will discuss any potential issues, review any required changes, and gather feedback on the installation process. We will also ask if the customer is satisfied with the experience and whether they recommend any improvements to how we manage installations in the future.

# Additional Information.

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