

The Time Wizard

The Time Wizard is a management tool that gives you a place to maintain basic employee information, and track hours worked based on the amount of time a user is signed into RMEEx. The Time Wizard can be found on the management menu, but to be able to access, setup or change this option, you will need to setup your UserID from the System Security menu.

(Take them to a userid on system security)

On this menu there is an option called "Collector Update" (**Coll.updates-YTW**).

- A "T" in this field will allow a user such as a Manager to Setup and Change the information in the Time Wizard option
- A "W" will allow a user, to be able to look at, and review the Time Wizard information and setup, but this user WILL NOT is able to make any changes to the time wizard.

Once this is setup with a W or T you will be able to access the Time Wizard.

(Walk them to the Time Wizard: From the Management Menu -> 9. Time wizard)

From the Management Menu take option 9 to bring up the Time Wizard Menu

There are two options that must be setup before adding your first Employee, and that's The Employee Category Code, and the Supervisor Information Code. Keep in mind as you set these up that we have reports that can be based on these codes.

First - Option 2. Employee Category Information:

(Take Option 2)

```
Employee Category Information
Employee Category  COLL
```

What types of users will you be setting up in the time wizard? Collectors, Clerical, Managers? You'll need to create a Category Code for each user type, either by typing a new code in the Employee Category field, or using the F3 search to see the existing categories

(Type: COLL)

We will create a category for collectors

(Hit Enter)

All you will need to do now is fill in the Discription

```
Employee Category Information
Employee Category  COLL
Description        COLLECTOR
```

(Fill in "Description")

And hit F12 to update

(Hit F12)

Next, Option 3 – Supervisor Information – Who will be this users Supeviser or Manager

(Take opt.3)

```

Supervisor Information

Supervisor code   TEAM01
    
```

Let's create a Supervisor code for the Team One supervisor.
 (Fill in Supervisor Code with Team01 and hit Enter)

```

Supervisor Information

Supervisor code   TEAM01

Supervisor Name   JOE SUPERVISER
    
```

(Fill in Supervisors Name)

Put in the Name of the Supervisor for this group of users. Remembering as I said, a report can be run for a group of users based on this Supervisor Code.

And hit F12 to update

(Hit F12)

Now your ready to fill in the "Employees Information"

Taking Option 1. Employee Information – This option is used to setup employees who are to be tracked

(Go to Opt 1)

You will need to create a unique Employee number for each user by entering it here, or using the F3 search to find existing employees

(Hit F3)

This Search will show you the Employee Number, and their first and last Names

```

Employee Search

-      1      JOE          BURWIN
-      4      DHARMARAJA  RANJAN
-      7      RANURA    ATHUKORALA
-     77      CURWIN
-    100      SLACKER    IMA
-    600      JAMIE      HORRELL
-   4121      HEINECK   STEVE
    
```

We can select a user by putting any character next to that Employee Number and hitting Enter

(Select code 1)

```

Employee Information

Employee number   000001      User ID  CURWIN  (Blank=Inactive user)
Employee name(L/F) JOE          CURWIN
Address           321 MAIN ST
                  APT 5A
City/State/Zip    ARKHAM      MA 22522
Home phone        321 512 2215      Social sec# 321 54 2132
    
```

This is where you will put the employees Demographics, making sure to put in the userid for this user in the UserID field...

Note that the Social Security Number WILL BE Encrypted, and cannot be seen by ANY

user that does not have authority setup at their UserID in system Security to also see encrypted Social Security numbers at the account level.

```

Category      COLL      Supervisor code TEAM01
Date hired    9/09/02   Date terminated
Salary       350.00   Pay period
    
```

Here's where you put the Employee Category and Supervisor code that we just created, once again remembering that reports can be generated based on these, along with the date hired, salary, date terminated, and the Pay period such as W for Weekly, M for Monthly ecterta or what ever you would want to put here if you wanted to use this field

```

Other Info.   LARGE BALANCE COLLECTOR THAT CAN HANDLE LEGAL ACCOUNTS
Notes        WORKS 9 TO 5 MON - THURS. FRIDAY, 12 TO 8PM
Hours for month  5.27  Hours for the year  5.27
    
```

F1-New selection F3-Search F7-Exit F12-Update

And here you can put other info and Notes about this User
 And the hours the user has been logged into RMEEx for the Month and the Year.
 Once you are done setting up this user, just hit F12 to update.

Now we can look at option 4. "Employee Sign-off update".
 Once this user is setup - If the user fails to sign-off when they leave for the day or are disconnected, they will need to contact a supervisor when they next try to sign on. If they do not do this, and continue with the sign-on process, there will be an error in the number of hours that the system will compute as worked. The supervisor will be able to go into "Employee Sign-off Update" on the Time Wizard options and update the employee's sign-off time.
 (Take option 4)

```

Employee Sign-off Updates

Employee Number  7
    
```

If you do an F3 search you will find any Employees that need to have their times updated
(Note: There is bad data in our system – you can decide if you want to do the F3 OR just use the user "100")

(Present the update screen)

```

Employee Sign-off Updates

Employee Number    000100
Employee Name     SLACKER      IMA
Date              1/26/09
Sign-on           12:57:03
Sign-off          1741
    
```

Enter The signoff date in Military Time with out the Colon and hit Enter
 (Enter the Time and hit enter)
 And you will see the correct time, hit F12 to update.

```

Sign-on          12:57:03
Sign-off         17:41
    
```

Next we option 5. Time Wizard Reports
 (Take option 5)

First we have Opt 1. "Employee Time by Date" This report shows the date and time that a user logged in for a date range, And any times that the user had not logged out correctly and requires a manager to update their logout time.

```

Date Selection For Employee Reports

Starting date     |
Ending date      |
Employee Number  |
(Blank=ALL)      |
Employee category|
(Blank=ALL)      |
Supervisor code  |
(Blank=ALL)      |
    
```

To run this report, you would put in the date range you will want to run.
 And then optionally the Employee number, or the Employee Category or Supervisor code such as the one we created earlier
 Once run,
 (F7 back to report menu)

Opt2. Employee Work Hours Detail
 (Take option 2)

This report has simular selection options but the report shows you the Signon date, Each time they signed in, and signed out, the hours worked, and total hours worked. Along with any times that the user had not logged out correctly and requires a manager to update their logout time
 (F7 back to the Time Wizard Menu)

Option 6. "Reset hours worked per month" This must be done at the end of each month to Zero out the hours for the current Month.

Option 7. "Reset hours worked per year", and this is to be done at the end of the year to Zero out the hours for the current year.

To Be able to run Option 6 and 7 to reset the hours the User is required to have System Control Menu access. This will prevent the options from being accidentally run.

(What the User Signing in will see)

So you can see what a collector sees when he signs on...

I will sign in as a User and you will see I will be presented with this screen

(Sign in - There is a userid Curwin (Pwr - Ask) setup in the time wizard as Employee 1)



They will see the Date and time along with there previous sign-on info, and a comment field to make a Note to themselves that they can see every time they signon.

(finish signing in then, Use 90 to signout)

When the user Signs out and they will see the same screen.

(Sign back in as Curwin)

If the user signs in, but exits out of RMEEx by just closing the window, his session gets terminated, or they exit any other way other then using 90 to log out. Next time they log in, the comment field will display the message "Abnormal session termination"

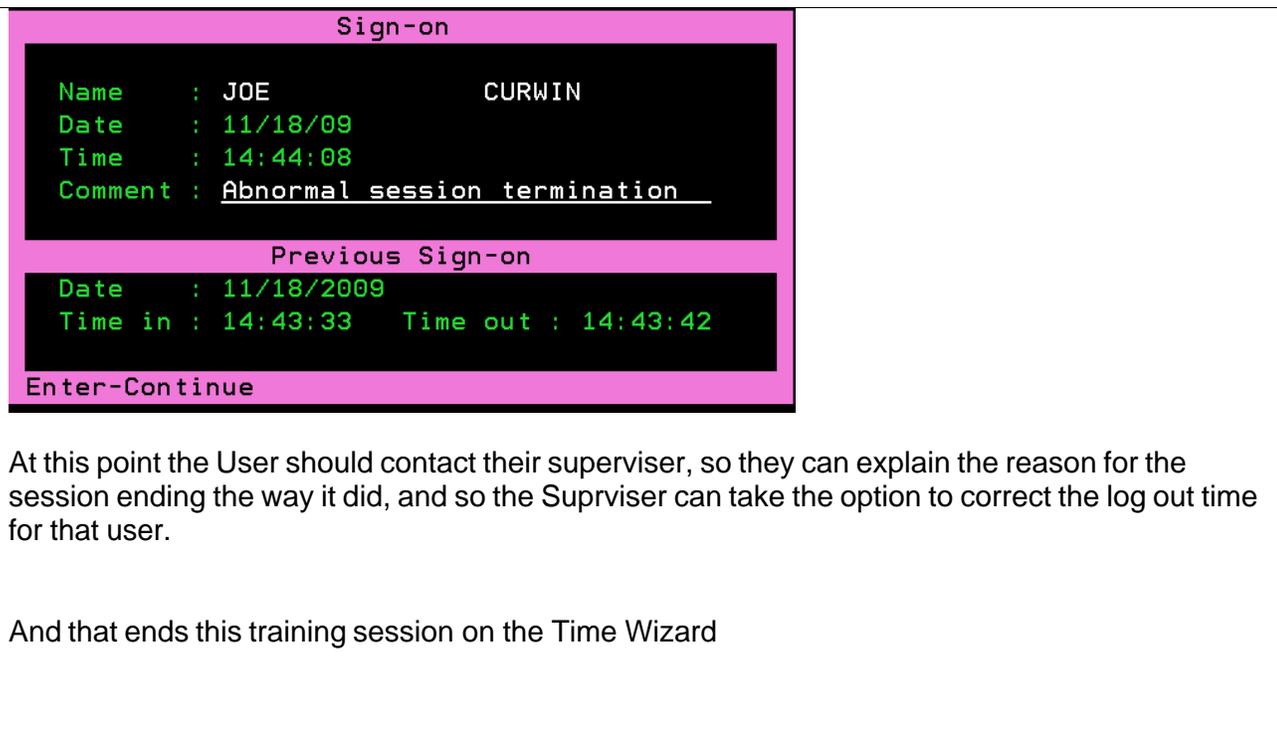
Now I am just going to click the red X and just end this Client Access session

(Close Client Access)

Now when I sign back in, this is what the collector will see.

(Sign back in)

"Abnormal session termination" is now in the Comment field.



The screenshot shows a terminal window with a pink border. The top section is titled "Sign-on" and contains the following text:

```
Name      : JOE                CURWIN
Date      : 11/18/09
Time      : 14:44:08
Comment   : Abnormal session termination
```

The bottom section is titled "Previous Sign-on" and contains the following text:

```
Date      : 11/18/2009
Time in   : 14:43:33   Time out : 14:43:42
```

At the bottom of the terminal window, the text "Enter-Continue" is displayed.

At this point the User should contact their supervisor, so they can explain the reason for the session ending the way it did, and so the Suprviser can take the option to correct the log out time for that user.

And that ends this training session on the Time Wizard