



BASIC TRAINING

Training Documentation for Administrators

[Training materials](#)

The basic training is aimed at those who have just started or are about to start working in Timeplan. During the training, we review the basic features and make sure that you have all the tools you need to use Timeplan.

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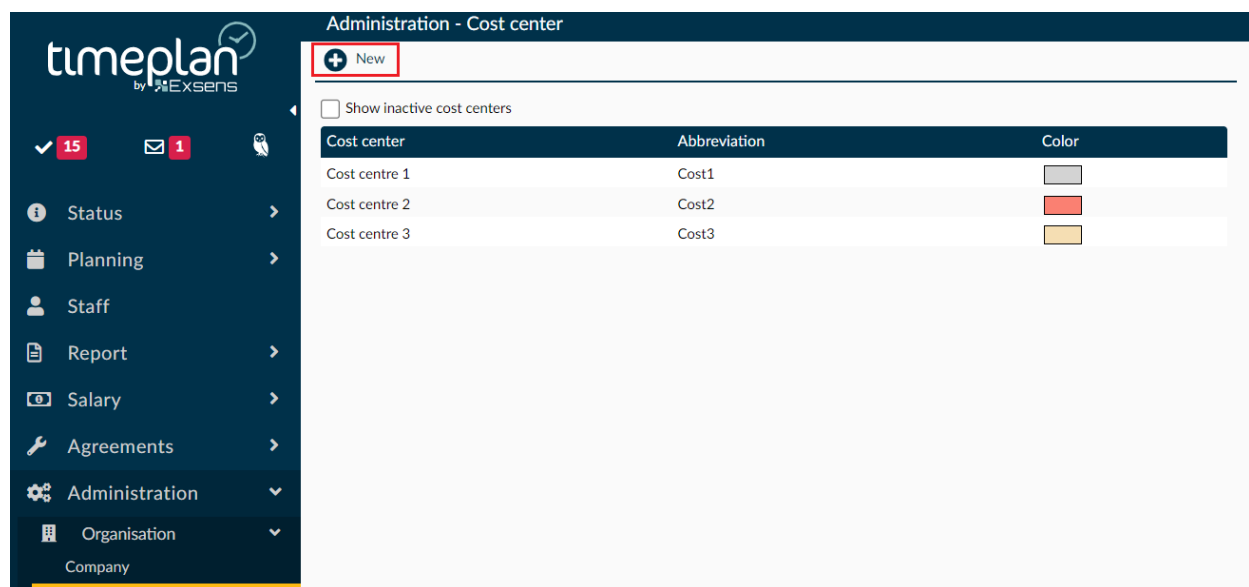
Cost centres

Cost centres can be placed on equal footing with departments or areas within an enterprise.

In Timeplan these are used to sort personnel into groups and make it easier to review and control who works where, what the schedule looks like, whether the demand is covered and what the costs of each department look like. All staff are associated with at least one cost centre and cannot be put on the schedule of cost centres they are not associated with.

To set up or adjust cost centres, press the tab **Administration, Organisation** and then select **Cost centre** from the menu. You will then get a list of all active cost centres. If you also want to see inactive cost centres, put a checkmark in the box.

If you want to add new cost centres, click on **New+**, in the top left corner.



Cost center	Abbreviation	Color
Cost centre 1	Cost1	Grey
Cost centre 2	Cost2	Red
Cost centre 3	Cost3	Yellow

You can then choose a name for the cost centre (e.g. Administration) and an abbreviation that will appear in the web app. You can also choose the colour of the cost centre from the drop-down menu. It is recommended not to choose black or red tones as important text might disappear. Once you are satisfied with your choices, press **Save**.

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✓ 15

✉ 1

🦉

Status

Planning

Staff

Report

Salary

Agreements

Administration

Organisation

Company

Cost center

Administration - Cost center

Back

Cost center: Cost centre 1

Save

New

Delete

Name: Cost centre 1

Abbreviation: Cost1

Active: ☒

Inactivate after:

External number:

External company:

Import id:

Color: LightGrey

Description:

Ambulating staff ☐

Show usage

User access

☒ Education

☒ Philip

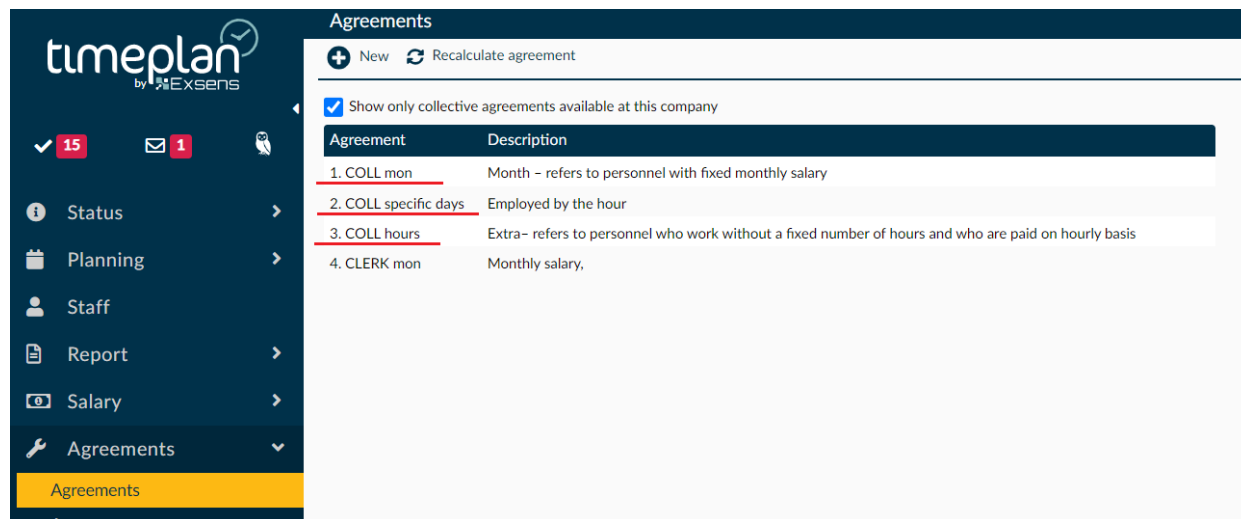
☒ Timeplan

☒ Zanna

Agreements

All employees registered in Timeplan receive an employment agreement. It is based on a collective bargaining agreement. There are standardised collective bargaining agreements, but these can be adjusted according to the customer's wishes.

Under the tab Agreements, there is a complete overview of all agreements listed in Timeplan.



In the example above you can see the most common abbreviations we use

“COLL mon” – refers to personnel with fixed monthly salary

“COLL specific days” – refers to personnel who have a fixed number of hours per month but are paid by the hour

“COLL hours” – refers to personnel who work without a fixed number of hours and who are paid on hourly basis

A brief summary of the various agreements and their settings can be found under Description. The most important items are usually how long the break is, if there are compensatory/annual working hours/flexible working hours and/or public holidays. You can set up as many agreements as you like but we recommend that you try to keep it relatively neat so that you can easily know which agreement applies to new staff.

Timeplan Support is responsible for posting and configuring the agreements since errors in the agreements can lead to problems for customers.

Own notes:

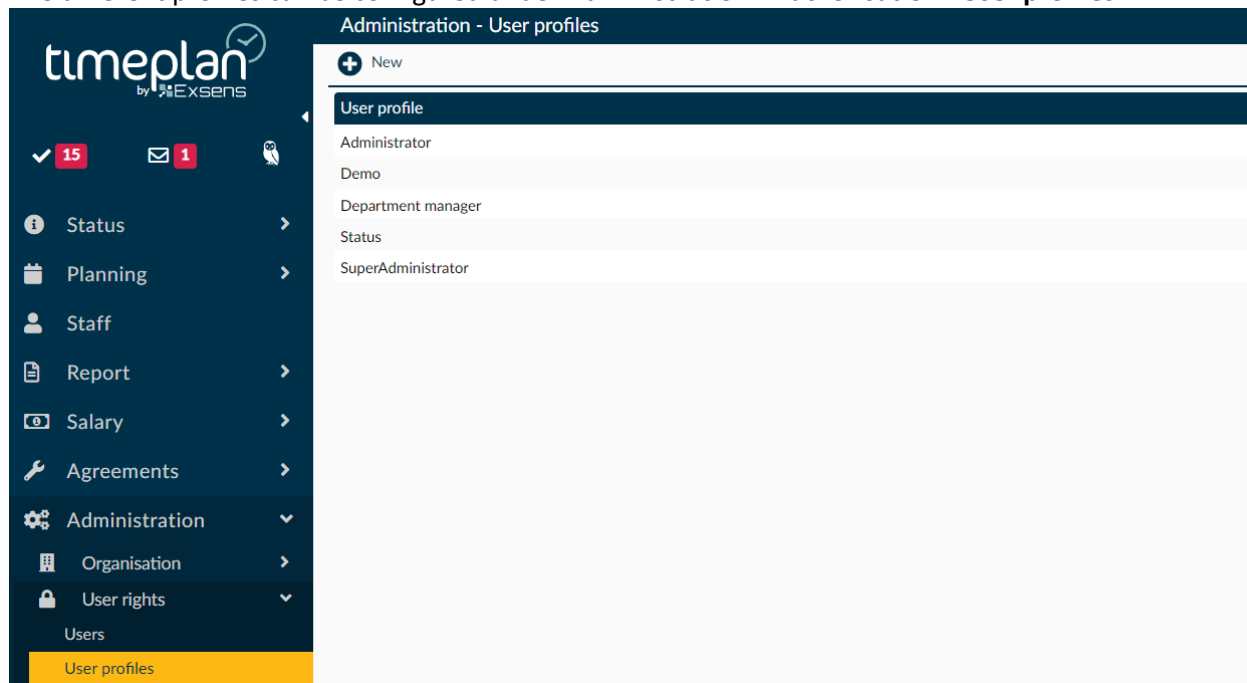
Administrators

Posting administrator files

Those who log into Timeplan to work in the system are called **Administrators**. Not everyone has the same rights in the system considering that a department manager does not need to have access to the same areas as a payroll administrator.

Each company should have a Timeplan manager who acts as first-line contact in case of problems and who has full system rights. This person can in turn post other administrator profiles and adjust rights.

The different profiles can be configured under **Administration –Authorisation –User profiles**



In the example above you can see the most common profiles that are posted in the system. Administrator, Department manager, Status and SuperUser.

SuperUser is the person with the highest permission level. Administrators has high-level permissions and is a common profile for key persons, which is why it should be distributed sparingly.

Department manager is a profile limited to one or more cost centres and functions and Status is a profile used for obtaining checklists and see the current status of the house.

You can see which permissions the different profiles have by clicking on each profile.

Administration - User profiles

Back User profiles: Administrator Save New Delete

Name: Administrator

Authority level: Super administrator

Administrator rights: ☐

Show salary information: ☒

Access rights: ☐ (Full access) **Uncheck all**

- ☒ Status
 - ☒ On duty
 - ☒ Approval progress
 - ☐ Entrance status Read & write
- ☒ Message
 - ☒ Messages Read & write
 - ☒ Message template Read & write
- ☒ Approvals
- ☒ Planning
 - ☒ Month overview
 - ☒ Day overview
 - ☒ Publish Schedule
 - ☐ Shiftplan Read & write
 - ☐ Leave application Read & write
 - ☒ Task rotation
 - ☒ Tasks
 - ☒ Planning overview
 - ☒ Requirement template
- ☐ Budgets
 - ☐ Annual budgets
 - ☐ Budget periods
 - ☐ Key formula Read & write
 - ☐ Manual saldos Read & write
- ☒ Staff
 - ☒ Staff
 - ☒ Main Settings Read & write Delete
 - ☒ Supplementary Read & write
 - ☒ Contract Read & write
 - ☐ Relatives
 - ☒ Task rotation
 - ☒ Calendar
 - ☒ Time rec. and balances
 - ☒ Change collective agreement on a task
 - ☒ Add manual balance
 - ☐ Equipment Read & write
 - ☐ Qualification/Skills Read & write
 - ☒ Messages

You can easily adjust what to display by putting a checkmark in or removing the checkmark from the boxes for the different tabs and their submenus. You can also make adjustments so that a profile only has read permissions for the different menus. If you want a profile to be able to see payroll information, you have to put a checkmark in this box. The permission level limits the profiles, which this type of administrator profile is able to certify, and/or have more permissions than. For example, you can have two profiles called Administratör (Administrator), but if one has SuperAdministratör (SuperUser) permissions, the other has Övrigt (Other) permissions. The Super permissions profile will be able to certify the Other permissions profile.

Once you are satisfied with your settings, press **Save** and if you want to create a brand-new profile, press **New+**.

Own Notes:

Creating new administrators

If you want to post a new Administrator, you need to have a profile with those rights. If you do, click on **Administration** and then on **Users**.

If you want to post a new Administratör (Administrator), you need to have a profile with those rights.

If you do, click on **Administration (Administration)** and then on **Användare (Users)**.

You can now see a list of all users that have been posted as well as which user profiles they have and which companies they have access to. If you know that you have posted a profile but you cannot find it, it may be worth putting a checkmark in Visa Låsta Användare (View Locked Users) since users who have entered an incorrect password several times lock themselves and then disappear from the list. Old users, too, are hidden there.

Administration - Users

+ New Print

☐ Show All Users ☒ Show Locked Users

Name	Username	User profile	Company	Locked
Education	Education	Administrator	All	<input checked="" type="checkbox"/>
Philip	Philip	SuperAdministrator	All	<input type="checkbox"/>
Timeplan	Timeplan	SuperAdministrator	All	<input type="checkbox"/>
Zanna	ZannaB	SuperAdministrator	All	<input type="checkbox"/>

To create a new administrator, press **New+**.

Administration - Users

Back Name: Education Save + New X Delete Print

Name: Education Username: Education Password: Language: English User profile: Administrator Approval role: General Manager

☐ User must change password at next login.

Limited access to:

Add Remove Clear Set limits

Access: ☐ All companies Reset

Receive message from: Reset

Company

- ☒ All Cost centers
 - ☒ Cost centre 1
 - ☒ Cost centre 2
 - ☒ Cost centre 3

Under Name, enter the first and last name of the person. The username is the name used for logging in. We usually recommend setting a temporary password and then putting a checkmark to allow the user to change password at the next login. You can also choose the language (Swedish or English).

Under User profile select which administrator profile the user should get and under Approval role select which level the person should be allowed to certify at.

Below this you can choose which company/companies the user will have access to. You can limit yourself to specific cost centres or choose the entire company. To the right of this, you can put a checkmark in or remove the checkmark to determine whether the user should receive messages from the company. This applies to error messages such as time stamp errors or deviation codes, not personal messages, so we usually recommend not putting a checkmark.

You can place restrictions on the user so that the user cannot change anything by themselves, such as stamps or certifications.

Once you are satisfied with your choices, press **Save**.

Own notes:

Staff -Hire an employee

Start by making sure that the person has previously been employed and registered in Timeplan by searching for the person on the **Staff** page, put a checkmark in the box **Without an active employment agreement**.

If the person has not been previously employed, select **New+** and fill in the following information on the personal data page.

- Name
- Personal identification number (10 digits)
- Date of birth (use TAB to auto fill)
- Address
- Postal code
- Postal address
- Telephone number
- Email

When you register an employee, an employee number is generated automatically, however, it can be adjusted to match the data in the salary system or to comply with other requirements.

After making changes to the Timeplan pages, you must press **Save** to save these changes.

The screenshot shows the 'Staff - Main Settings' page in the Timeplan application. The left sidebar contains a navigation menu with options like Status, Planning, Staff, Main Settings (highlighted), Supplementary, Contract, Task rotations and periods, Calendar, Time rec. and balances, Messages, Reports, Comments, Period adjustment, Accumulated saldos, Documents, Event log, Report, Salary, Agreements, and Administration. The main content area is titled 'Staff - Main Settings' and shows the details for an employee named 'Clooney, George (10009)'. The 'Employment no.' is 10009 and the 'Personal id no.' is 19890819-1532. The birth date is 1989-08-19, and the sex is Male. The address is 'Street 1' with postal code '12345' and city. The phone number is 0123456789, and the email is george.clooney@mail.com. The card number/code is 0000081, and the last recording is OUT 2021-06-11 15:00. There is a photograph of George Clooney and a 'New card number' button. The 'Employee app' section shows 'Mobile app' as '-', 'Web app' as 'Enabled', and 'Push notices for WebApp' as 'E-mail'. A 'Send invite' button is also present. The page has a 'Back' button, 'Save', 'New', and 'Delete' buttons at the top, and a 'Saved' status indicator.

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Staff - Main Settings

Back Save New Delete Name: Clooney, George (10009) Saved

Employment no.: 10009

Last name: Clooney

First name: George

Nickname:

Personal id no.: 19890819-1532

Birth date: 1989 8 19

Sex: Male

Address: Street 1

12345 City

Photograph:

New card number

Phone:

Cellphone: 0123456789

E-mail: george.clooney@mail.com

Card number/code: 0000081

Last recording: OUT 2021-06-11 15:00

Employee app

Mobile app: -

Web app: Enabled

Push notices for WebApp: E-mail

Send invite

* The employee chooses type of push notification in the WebApp.

On the page **Supplementary information**, fill in the punch terminal(s) in which the employee can clock in and out. Multiple terminals can be selected if the employee works at multiple locations within the company. If transferring bank account details, please also fill in the bank account on this page. The bank account is entered according to the standard supported by the company, which is often four digits for the clearing number, hyphen and then the account number sequence, such as CCCC-NNNNNNNNN. Swedbank accounts are often entered without the fifth check digit and thus follow the same standard as above.

Staff - Supplementary

Back | Name: Clooney, George (10009) | Save

Nationality: UNITED KINGDOM | Bank name: Bank
 Language 1: Swedish | Bank account no.: 123456789
 Language 2: English
 Language 3: Chinese
 Next of kin, name: Wife: Amal Clooney
 Next of kin, address: Street 1
 12345 City
 Time recorder profile: Employment number
 Work permission until: [] x
 Next of kin, phone1: 123456789
 Next of kin, phone2: []

Notes: [] [Add](#)

Default	Captured	Identification method
<input checked="" type="radio"/>	<input type="checkbox"/>	Right index finger ↻ ✕
<input type="radio"/>	<input type="checkbox"/>	Right middle finger ↻ ✕

Valid time recorders:

☒ Timeclock company

Now the person must be linked to an agreement and this is done under **Employment agreements**.

Here, you select which collective agreement the employee should be linked to. This is done in the subheading **Employment agreements**. It is important to choose the right agreement in order for the time to be calculated correctly. Read through the agreements you can choose from by holding down the drop-down menu for collective agreements, considering which one is most similar to the agreement you physically signed with the employee.

If the agreement name contains the word “Mon”, this means that this is an agreement for employees who receive a fixed monthly salary. If it says “Tim” in the agreement name, this means that the employee is permanently employed for a certain number of hours but is paid hourly, not a lump sum monthly. If an employee has a permanent employment, it is important that you fill in the number of hours the employee will work each week in the box **Weekly working hours**. Weekly working hours are then used as basis for all time calculations in the system. All employees must be linked to at least one **Cost centre** and you can add or remove cost centres by pressing **Add/Remove**.

✓ 16

✉ 1

🦉

Status >

Planning >

Staff >

Main Settings

Supplementary

Contract

Task rotations and periods

Calendar

Time rec. and balances

Messages

Reports

Staff - Contract

Back

History

Save

New

Delete

Recalculate contract

Print employment history

Name: Clooney, George (10009)

Contract: Administrator(2021-06-02 -)

Primary company: Company

Employed from: 2021-05-01

Agreement: 1. COLL mon

From: 2021-06-02

Position: Administrator

Until:

Employment type: Permanent post

Weekly work time: 40:00 (100% of full time)

Notes:

Days of vacation: 25

Cost centers: Change »

Cost centre 1	Company
Cost centre 2	Company
Cost centre 3	Company

Lön: 25000,00 kr/month

Own notes:

Switching an employee's agreement

For example, if a person has been an hourly employee and is going to switch to a monthly employee, select **New** and then select the date of the new agreement. A copy of previous contracts is created with the new employment date. Then you can switch the agreement to the new one and change any weekly working hours. Never put the end date in the box **End date** unless you know for sure that the person will resign. It will not be possible to include the employee in the timetable after the end date.

All employment agreements are saved under **History** so that you can go back and see how an employee has worked and what terms and working hours their agreement had at that time.

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✓ 16 ✉ 1 🦉

📌 Status >
📅 Planning >
👤 Staff >
Main Settings
Supplementary
Contract
Task rotations and periods
Calendar
Time rec. and balances
Messages

Staff - Contract

⬅ Back Name: Clooney, George (10009) ⬆ ⬇
⬅ History Contract: Administrator(2021-06-02 -) ⬆ ⬇
✔ Save + New ✖ Delete ↺ Recalculate contract 🖨 Print employment history

Primary company: Company Employed from: 2021-05-01
Agreement: 1. COLL mon From: 2021-06-02
Position: Administrator Until: ✖
Employment type: Tillsvidareanställning Weekly work time: 40:00 (100% of full time)
Notes: Days of vacation: 25

Cost centers: **Change »**

Cost centre 1	Company
Cost centre 2	Company
Cost centre 3	Company

Lohn: 25000,00 kr/month

Own notes:

Planning and creating work shifts

In order to prepare a basic schedule, you must first do so-called work shifts, which you then use when creating the basic schedule itself.

Press **Planning** and then **Tasks**. Then choose the **cost centre** to place your work shifts in. Click on **+ New**.

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Planning - Tasks

Cost center: Cost centre 1

Save + New Delete

Name: Early Default break rule: -

Abbreviation: Early

0 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 9:00

6:00-15:00

Task	0	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	9:00
Early																									
Morning																									
Evening																									

Name your shift in **Description** , e.g. "Administration 8:00-17:00"

Abbreviation can be, for example, "8-17"

At **Default break rule**, choose among (no break), half hour or full hour. This is a calculation aid to allow you to easily see the total number of hours of the shift without any employee being connected to it.

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Planning - Tasks

Cost center: Cost centre 1

Save + New Delete

Name: Early Default break rule: 60 minutes

Abbreviation: Early

0 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 9:00

6:00-15:00

Task	0	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	9:00
Early																									
Morning																									
Evening																									

To drag a shift as in the example above, place the mouse pointer on 8, click with the mouse and drag the shift to 17: 00. If you need to adjust the time, you can double-click on the shift itself and enter the time you want in your work shift.

Click on **Save**.

To set up on-call duty or overtime shift, follow the same procedure. Drag a shift, double-click on the task and select on-call duty or overtime from the drop-down menu under **Type**. Press **Save**.

To make configure the settings of your shift, double-click on it. You can choose to steer away breaks or cost deductions on the shift. However, the settings you make to the shift apply to the settings in the employee's agreement so be careful not to steer away too many things as it easily causes problems. If you choose to change something in the shift, take the habit of naming the shift to something where this change is evident, for example: "8:00-17:00 Emergency".

Once you have saved the task, a red text will appear saying Arbetspasset ingår inte i något grundschema eller i någon behovsmall (The work shift is not included in any basic schedule or in any needs template). The text will remain there until the shift is used in a basic schedule.

To make additional shifts, press **New+** and then follow the same procedure as above. Continue to do the work shifts needed to create your basic schedule.

All saved work shifts are collected under the row where you set up the shifts, arranged by start time.

Create task rotation in Shiftplanning

Shiftplanning is an overview view where schedulers can work in parallel with multiple basic timetables at the same time in order to ensure that the needs of the business are always met.

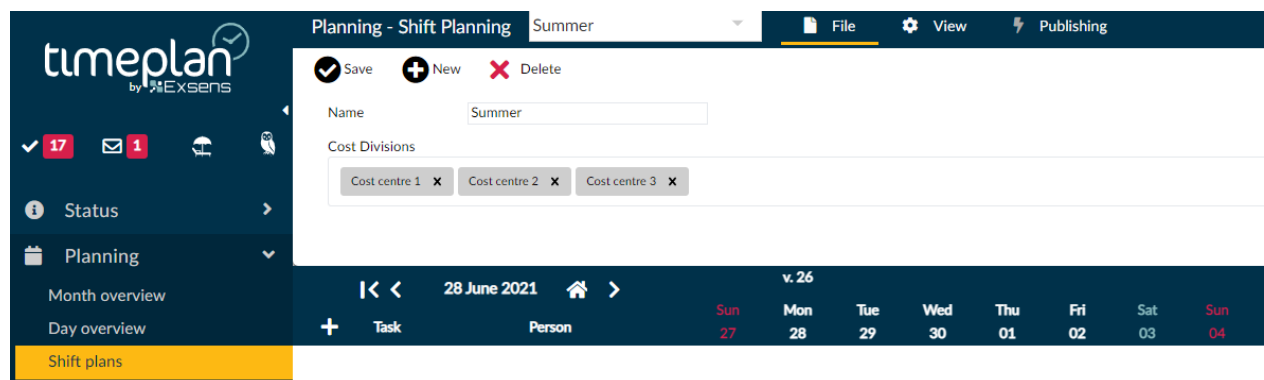
Click on **Planning** and then select Shiftplanning from the left menu.

When you open it, the menu on the left will disappear and most of the screen will show Shiftplanning tool You can access Planning menu at any time by hovering your mouse over the grey menu the arrow is pointing at in the image below.

Shiftplanning uses a direct saving method, i.e. all things you do are saved in real time so you never have to press a save button.

New taskrotation period

To start working with a new task rotation period, first select a name; e.g. Summer as well as which cost centres you want to plan task rotation for.

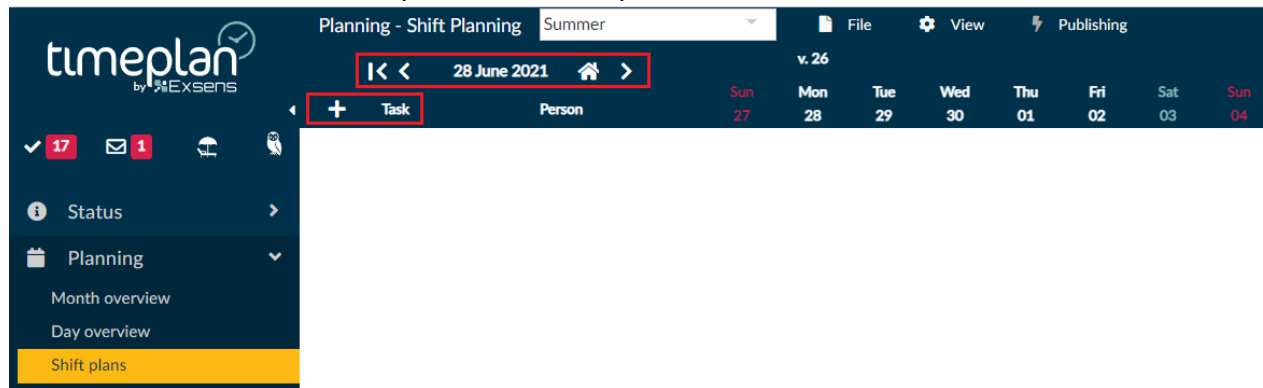


After selecting a name and adding cost centres, press **Create**.

You will only be able to select cost centres that you have permission to access, so if a cost centre is missing, please contact your company's SuperUser for access.

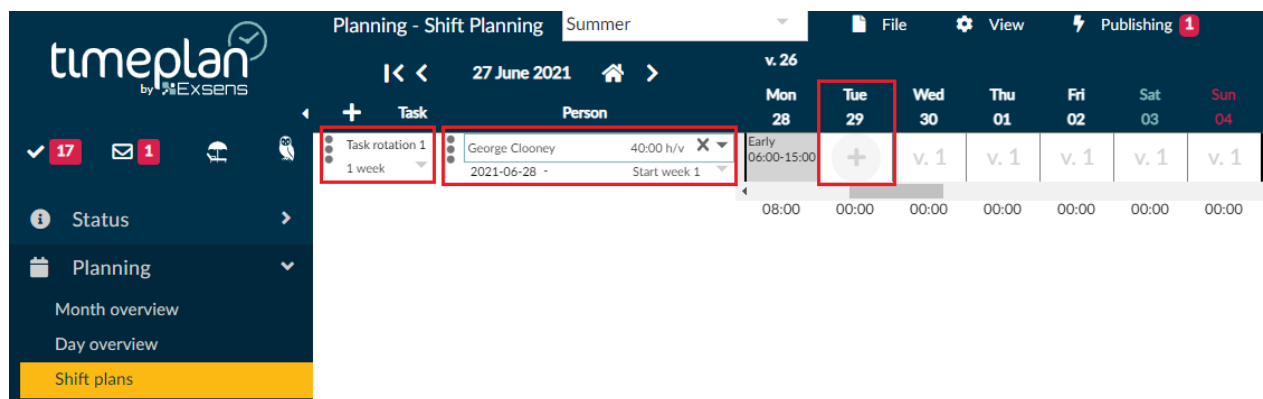
Once you have created a timetable period, you will see a new view showing the name of the period, date and a number of buttons through which you can navigate back and forth in the calendar. Schemaplaneraren (Timetable Planner) has a longer deadline since it can generate dates up to 1.5 years ahead, which gives you, in your capacity as scheduler, a better overview. You can also scroll back in time to see past dates.

The small house button takes you back to today's date.

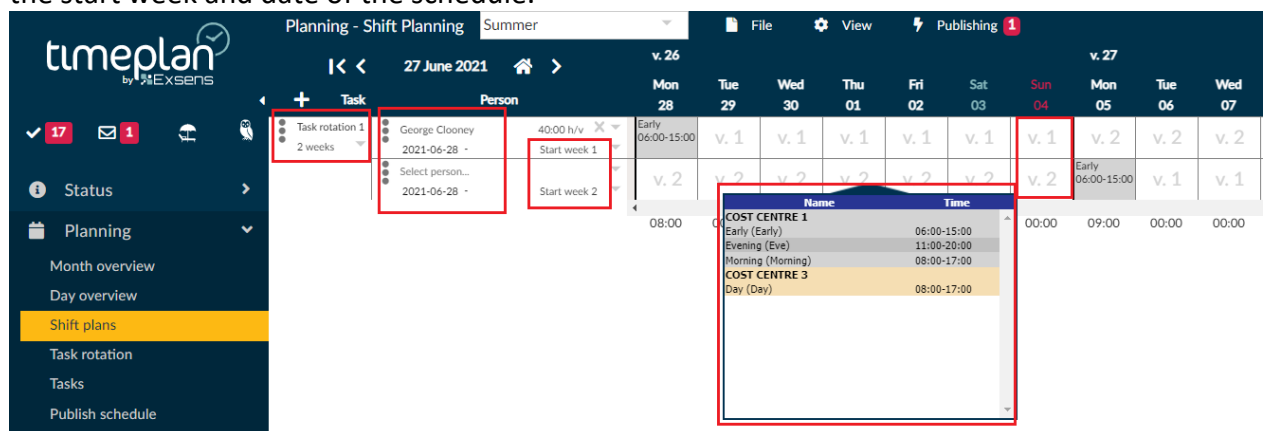


To start posting basic schedules, press **+Task**. There you get to choose whether you want to set up a completely new task rotation or add an existing one. If you choose to use an existing task rotation, Timeplan will retrieve your previous task rotation and you can choose to further develop them shiftplanning

Creating a task rotation



You can add a description/name to your timetable. Below it you can select the duration of the task rotation, i.e. how many weeks it rolls over (1-16 weeks). You can choose to add a person to the task rotation immediately or you can create an unmanned task rotation. You can select the start week and date of the schedule.



In the image above you can see that a rolling timetable of two weeks called Summer is being created.

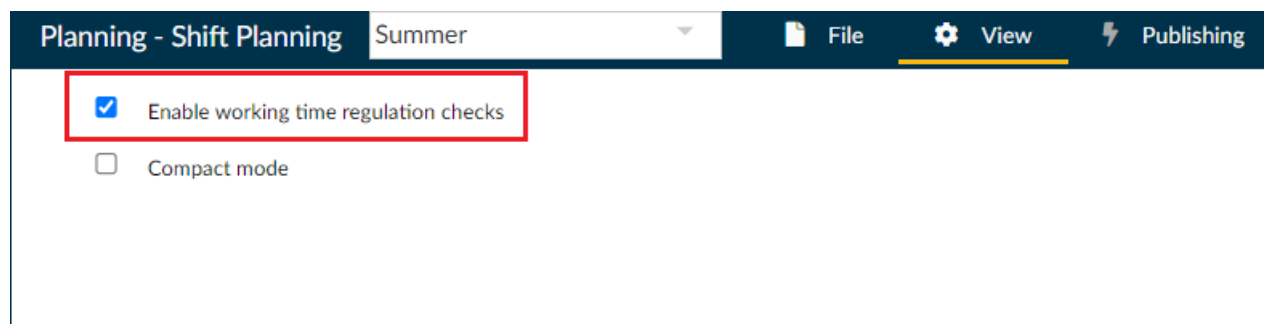
If you click on the three dots, you can choose to link another person to the schedule, either a specific employee or an unmanned schedule. This option is useful if you have two employees who are going to work according to one and the same timetable, but who are also going to overlap, because the changes made in one taskrotation automatically affect the other.

Two people are linked, who in this example are called Noname and George Clooney. They both start working according to the schedule on 06/28/2021 but have different start weeks, because they are going to overlap. This becomes particularly clear when the weeks have different numbers (see example Monday the 28th).

To start posting a shift, hover your mouse over a day of the week and click. You will then see a drop-down menu with all work shifts available at the added cost centres and the people.

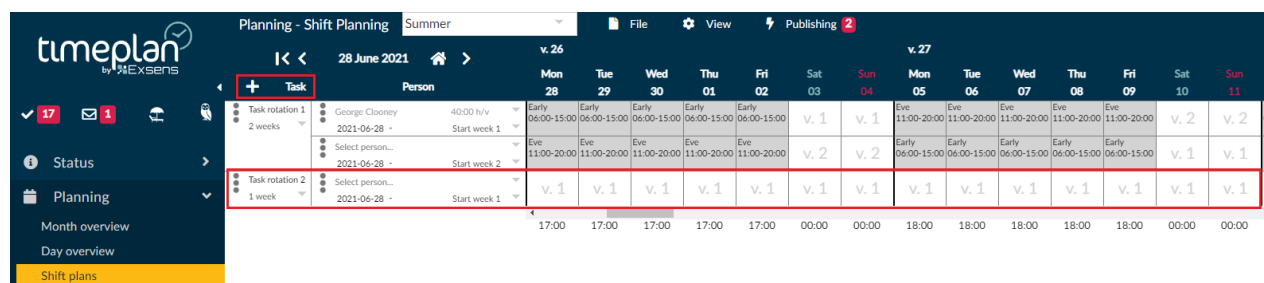
Shiftplanning works using the so called "Drag and Drop" method, which allows you to easily place and move shifts between days and timetables. Everything you do is saved in real time so be careful not to make too big changes because the system saves everything, even the errors, if any. In this early version there is no undo button.

If you want Timeplan to check Working time regulation check while you are creating your timetable, click on **View** and then put a checkmark in Enable working time regulation checks.



Multiple task rotation in one and the same view

Once you are satisfied with one or more of your timetables, you can easily continue your planning by pressing +Task to add more task rotations. These are posted automatically under the others and you can name the schedule, enter weeks and link to employees etc.



Publishing

Once the task rotation is complete, click Publishing. A list will be displayed containing warnings or errors that must be rectified before the timetable is completely clear.

The screenshot shows the 'Planning - Shift Planning' window with 'Summer' selected in the dropdown. The 'Publishing' button, indicated by a lightning bolt icon and a red '2', is highlighted with a red box. Below it, the 'Update' button is also highlighted. A table displays the following messages:

Type	Description
Warning	The schedule 'Task rotation 1' have 1 row without any person connected.
Error	The schedule 'Task rotation 2' is without tasks.
Error	The schedule 'Task rotation 2' need at least one person.
Warning	" from date 2021-06-28 on schedule 'Task rotation 1' can't be lower than today. After publishing, the from date will changed to today.
Warning	'George Clooney' on schedule 'Task rotation 1' does already have a schedule from '2021-06-02 - 2021-06-30' which will completely or partially be overwritten.
Warning	" from date 2021-06-28 on schedule 'Task rotation 2' can't be lower than today. After publishing, the from date will changed to today.

- What is referred to as "error" must be rectified before the task rotation can be published.
- What is referred to as "warning" is given as an indication that something may need to be rectified. However, the task rotations can be published even if you choose not to rectify the warnings.

Once the list has been reviewed, click Update. If all items have been rectified, the list will be empty and the task rotation - ready to be published.


Own notes:


Monthly overview

Monthly Overview is the part in Timeplan that is best suited for work on temporary changes. You can find the monthly overview under Planning – Monthly overview

Before your monthly breakdown opens, you have to choose which date to use as start date, how many weeks to display, and which cost centres to see.

Planning - Month overview

 Print

 Settings

Start date: 2021-06-28

Until date: 2021-07-11

Length: 2 Weeks ▼

Cost centers:

Cost centre 1

Cost centre 2

Cost centre 3

Detail level: ☒ Normal

☐ Compact

Sort by: Cost center and name ▼

Show

Under **Settings** you can make more detailed adjustments and customise the monthly overview so that it shows the items you are interested in seeing.

A good feature to gain control over hours and time worked is to select three accounts to display on the left side of the monthly overview. This is done under **Information column** at the bottom of the page.

If you have extra or absent personnel or if you have a preference for the order in which you want to see your personnel, you can click on **Custom Sorting**. This opens a view where you can drag the names of the personnel to a specific order, which is then reflected in the monthly overview. Once satisfied, click on **OK** and then on **OK** again to return to the view above. Here it is important to select **Sorting** and then **Custom Sorting** in order for it to have an impact on the monthly overview. Once you are satisfied with your settings, click on **View**.

Planning - Month overview														
Week and month	w.26 June				w.26 July				w.27 July					
Weekday	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
Date	28	29	30	1	2	3	4	5	6	7	8	9	10	11
Available tasks	+	+	+	+	+	+	+	+	+	+	+	+	+	+
Cost centre 1:														
Clooney George	1. 40:00 80:00 81:00	Early 06:00-15:00	Early 06:00-15:00	Early 06:00-15:00	Early 06:00-15:00	Eve 11:00-20:00		Early 06:00-15:00	Early 06:00-15:00	Early 06:00-15:00	Early 06:00-15:00	Early 06:00-15:00		65:00
Testsson Tora	4. 40:00 80:00 56:00			Early 06:00-15:00	Early 06:00-15:00			Early 06:00-15:00	Early 06:00-15:00	Early 06:00-15:00	Early 06:00-15:00	Early 06:00-15:00		56:00
														7. 00:00


Monthly overview shows a lot of information:

1. The employee's first name and surname. The row that goes horizontally from the name is the information related to the employee.
2. The shift that the employee is to work Thursday, 1st of July, week 26. The top row of the box is the shift abbreviation defined when it was created. For more information on creating work shifts, see [here!](#) The bottom row shows the hours of the shift.
3. The symbol to the right of the number indicates that there is a basic timetable linked to the person and that it rolls during the period. For more information on creating a basic timetable, see [here!](#)
4. The green symbol next to the digit shows that all working hours and daily rest periods are met in the timetable. Timeplan will never prevent you from departing from the law but we recommend following the law to the greatest extent possible.
5. The options under information column that you can make under Settings can be seen here. The account to which the numbers refer can be seen if you hover the mouse pointer over the numbers.
6. Here you can see the total working time during the selected period, in this case one week. If you opened a month, the sum would be one month's working time.
7. The red numbers on the right, during the total working time, are the absence hours, including full day absence, during the selected period. There may also be a blue number here and, if so, it would indicate the absence time during part of the day that may be entered in the timetable during the period.
8. Here you can see that the employee is absent with the code sick.

If you want to review a day or a shift in detail, double-click on the shift or the day and you will be directed to **Time rec. and balances** where more specific adjustments can be made. These adjustments will be reflected immediately in the Monthly Overview.

Moving shifts in the monthly overview

Monthly overview makes it easy to move shifts between employees. If an employee wants to switch a shift or if, for some other reason, you need to move a shift from one employee to another, select the shift to be moved. All employees who can work the shift light up and you can click on the employee who will be working instead, so the employee moves to that line and the shift is switched.

 This symbol appears on the employee whose shift was moved because Task rotation has now been circumvented and that person is now behind with their weekly working hours.

timeplan

by XSENS

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Status

📅

Planning

📅

Month overview

📅

Day overview

📅

Shift plans

Planning - Month overview

Week and month	w.26 June					w.26 July			w.27 July						
Weekday	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
Date	28	29	30	1	2	3	4	5	6	7	8	9	10	11	
Available tasks	+	+	+	+	+	+	+	+	+	+	+	+	+	+	
Cost centre 1:															
Clooney George	40:00 81:00	Early 06:00-15:00	Early 06:00-15:00	Early 06:00-15:00	Early 06:00-15:00	Eve 11:00-20:00			Early 06:00-15:00	Early 06:00-15:00	Early 06:00-15:00	Early 06:00-15:00	Early 06:00-15:00		65:00 16:00
Göthborg Glenna	40:00 80:00	KS 09:00-18:00	KS 09:00-18:00	KS 09:00-18:00	KS 09:00-18:00	KS 09:00-18:00			KS 09:00-18:00	KS 09:00-18:00	KS 09:00-18:00	KS 09:00-18:00	KS 09:00-18:00		00:00 00:00
Strong Charlie	40:00 80:00	KS 09:00-18:00	KS 09:00-18:00	KS 09:00-18:00	KS 09:00-18:00	KS 09:00-18:00			KS 09:00-18:00	KS 09:00-18:00	KS 09:00-18:00	KS 09:00-18:00	KS 09:00-18:00		00:00 00:00
Tesslön Tora	40:00 48:00				Early 06:00-15:00	Early 06:00-15:00			Early 06:00-15:00	Early 06:00-15:00	Early 06:00-15:00	Early 06:00-15:00			48:00 00:00

Adding shifts to Monthly Overview

If you want to add extra shifts, you can easily do so directly in the monthly overview.

First you have to decide who will work the shift. Then click once on the day on the line of the employee who is to work and you will get a box with all available shifts for that person. The shifts displayed are determined by the cost centres to which an employee belongs and their level of competence. After that, click on the shift you want to post and then press **OK**.

The shift will come up on the selected day.

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📄 Status

📅 Planning

📅 Month overview

📅 Day overview

📅 Shift plans

📅 Task rotation

📅 Tasks

📅 Publish schedule

📅 Planning overview

📅 Requirement template

👤 Staff

📄 Report

💰 Salary

🔧 Agreements

⚙️ Administration

Planning - Month overview

Week and month	w.26 June				w.26 July						
Weekday	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	
Date	28	29	30	1	2	3	4	5	6	7	
Available tasks	+	+	+	+	+	+	+	+	+	+	
Cost centre 1:			Early			Eve (2)					
Clooney George	40:00 80:00 81:00	Early 06:00-15:00	Early 06:00-15:00	Early 06:00-15:00 Sjuk	Early 06:00-15:00	Eve 11:00-20:00			Early 06:00-15:00	Early 06:00-15:00	
Göthborg Glenna	40:00 80:00 80:00	KS 09:00-18:00	KS 09:00-18:00	KS 09:00-18:00	KS 09:00-18:00	KS 09:00-18:00			KS 09:00-18:00	KS 09:00-18:00	
Strong Charlie	40:00 80:00 80:00	KS 09:00-18:00	KS 09:00-18:00	KS 09:00-18:00	KS 09:00-18:00	KS 09:00-18:00			KS 09:00-18:00	KS 09:00-18:00	
Testsson Tora	40:00 80:00 48:00				Early 06:00-15:00	Early 06:00-15:00			Early 06:00-15:00	Early 06:00-15:00	

Req. templ. tasks

Cost center tasks

Early (Early)

6:00-15:00

Evening (Eve)

11:00-20:00

Morning (Morning)

8:00-17:00

Day (Day)

8:00-17:00

OK

Cancel

Adding unmanned work shifts in to Monthly Overview

Unmanned shifts can be added to the monthly overview. During particularly staff-intensive periods you might have to bring in extra staff but you do not know who can work, only that there are shifts that needs to filled in.

Click on the **[+]** symbol as specified above on the day you want to add unmanned shifts. This opens a box where you can choose the type and number of shifts you want to add. Once you are satisfied with the number and type of shifts, press **OK**.

Planning - Month overview


Week and month	w.26 June				w.26 July			
Weekday	Mon	Tue	Wed	Thu	Fri	Sat	Sun	
Date	28	29	30	1	2	3	4	
Available tasks	<div><div>ANTAL</div><div>NAMN</div><div>TID</div><div>Cost centre 1</div><div>1</div><div>Early (Early)</div><div>6:00-15:00</div><div>Evening (Eve)</div><div>11:00-20:00</div><div>Morning (Morning)</div><div>8:00-17:00</div><div>Cost centre 3</div><div>Day (Day)</div><div>8:00-17:00</div><div>OK</div><div>Avbryt</div></div>							
Cost centre 1:								
Clooney i								
George								
Göthborg i								
Glenna								
Strong i								
Charlie								
Testsson i								
Tora								

The shifts will then fall down and end up on the line **Unmanned Shifts**. You can see the type of shift in the description and the number of shifts of the same type by the number in brackets. In the example above there are two day shifts, one evening shift, one more day shift but from another cost centre and then a morning shift. When you want to post your shifts to employees, click on the shift you want to post. Anyone who can work that shift lights up and you click on the person you want to give the shift to.

Shifts requests can also be sent out to your personnel via the Timeplan web app for employees. For instructions on how to do this, please refer to the manual at [Webbapp, Användarmanual för Administratörer \(Web App, User Manual for Administrators\)](#) as well as [Webbapp, Användarmanual för Användare \(Web App, User Manual for Users\)](#).

If you need to delete an unmanned shift, press it and select **Delete** in the menu that appears.

Deleting shifts from Monthly Overview

If there has been an error when posting shifts in the Monthly Overview, you can delete them by pressing the shift that is incorrect. It is then highlighted in a lighter colour and you can press DELETE on your keyboard to delete the shift. If it is Task rotation shift you are deleting, the symbol  will appear and you may have to compensate the employee with a different shift to accommodate their employment rate.

To remove the unmanned shift from the monthly overview, click on the desired shift and select Delete.

Adding an absence code in Monthly Overview

If an employee needs to be absent from one or more shifts, you can add this directly to Monthly Overview.

The screenshot shows the 'timeplan by EXSENS' interface. The main window is titled 'Planning - Month overview' and displays a calendar grid for June and July 2021. The grid shows weekdays and dates, with columns for June 28-30 and July 1-5. A sidebar on the left contains navigation options: Status, Planning, Month overview (selected), Day overview, Shift plans, Task rotation, Tasks, Publish schedule, Planning overview, Requirement template, Staff, Report, Salary, Agreements, and Administration. A modal window titled 'Absence entire day:' is open, showing a 'Deviation code:' dropdown menu with 'Sick' selected. The modal also includes fields for 'Deviation part of day', 'Time', 'Period', and checkboxes for 'OK', 'Cancel', and 'Create available shift when absent a whole day'.

Double-click in the bottom box (marked in red in the image above) for one day to quickly bring up the absence manager.

You can then select the type of absence from the drop-down menu and enter the period in question. It is set to only apply to one day, but if an employee will be away on holiday, you can easily add this here. Then press **OK** and the absence code will be rolled out under the selected dates.

It is important not to delete the work shifts for the employee during the absence period because the timetable must have a shift to be absent from in order to perform the calculation correctly. If an employee is to be absent on days when they do not have a work shift, the absence code will remain. The timetable does not deduct holidays or hours from days on which the employee does not need time off from a shift.

Own notes:

Absence

All absence in Timeplan are calculated on the basis of work shifts. If an employee is absent from a work shift with a valid absence code, the shift must remain in Timeplan.

All absence in Timeplan are calculated on the basis of work shifts. If an employee is absent from a work shift with a valid absence code, the shift must remain in the schedule. This is because Timeplan can only calculate the number of hours or days based of absence based on the scheduled time.

To add an absence code to an employee; click on **Staff – [employee name]**

Calendar. Click on the first day of absence and then on the icon to be forwarded to the absence manager.

Then select a suitable deviation code from the drop-down menu next to **Deviation code**. The period during which the employee is to be absent is entered under **Period**. In the example below, from 17-18th of June.

After that, click on **OK (OK)**.

It is important not to delete the work shifts for the employee during the absence period because the timetable must have a shift to be absent from in order to perform the calculation correctly. If an employee is to be absent on days when they do not have a work shift, the absence code will remain. The timetable does not deduct holidays or hours from days no which the employee does not need time off from a shift.

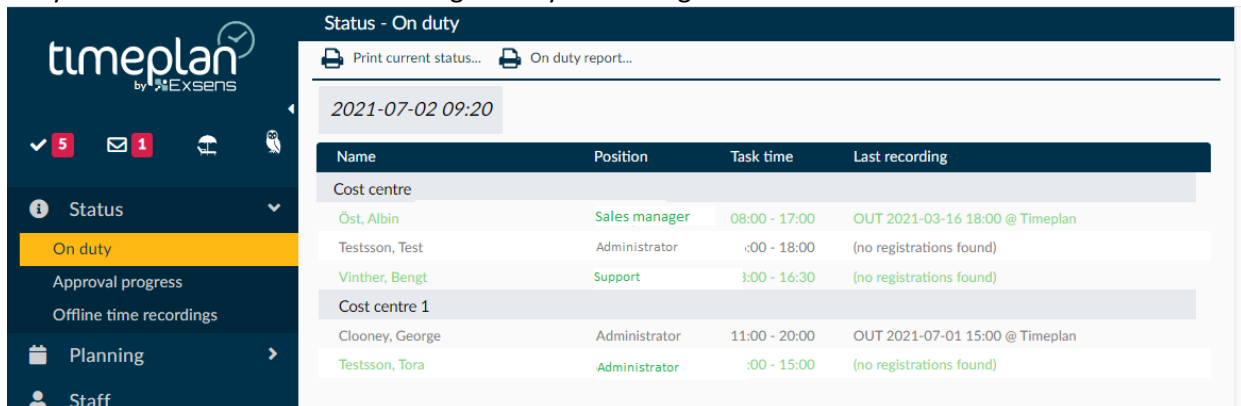
You can also enter via **Staff - [employee name] – Time rec and balances** and enter an absence code on a selected day or via **Monthly Overview**.

Own notes:

Status

Here, it is possible to see which persons are registered, which have a timetable and should have clocked in, and which are absent with absence code. The list can be printed in the event of a verification visit from the Swedish Tax Agency and it is therefore important for everyone to clock in. In case of a visit by the Swedish Tax Agency, Skriv ut kontrollrapport (Print inspection report) must be used in order to include all those who have clocked in, including those who have clocked in on previous days.

- Green – Clocked in and currently working
- Red – Has work shift right now but has not clocked in
- Yellow – Has work shift but has a valid absence code
- Grey - Work shifts are available during the day but not right now



The screenshot displays the 'Status - On duty' page in the Timeplan by Exsens application. The left sidebar contains a navigation menu with 'Status' selected, showing 'On duty' in yellow. The main area shows a date filter '2021-07-02 09:20' and a table of staff status.

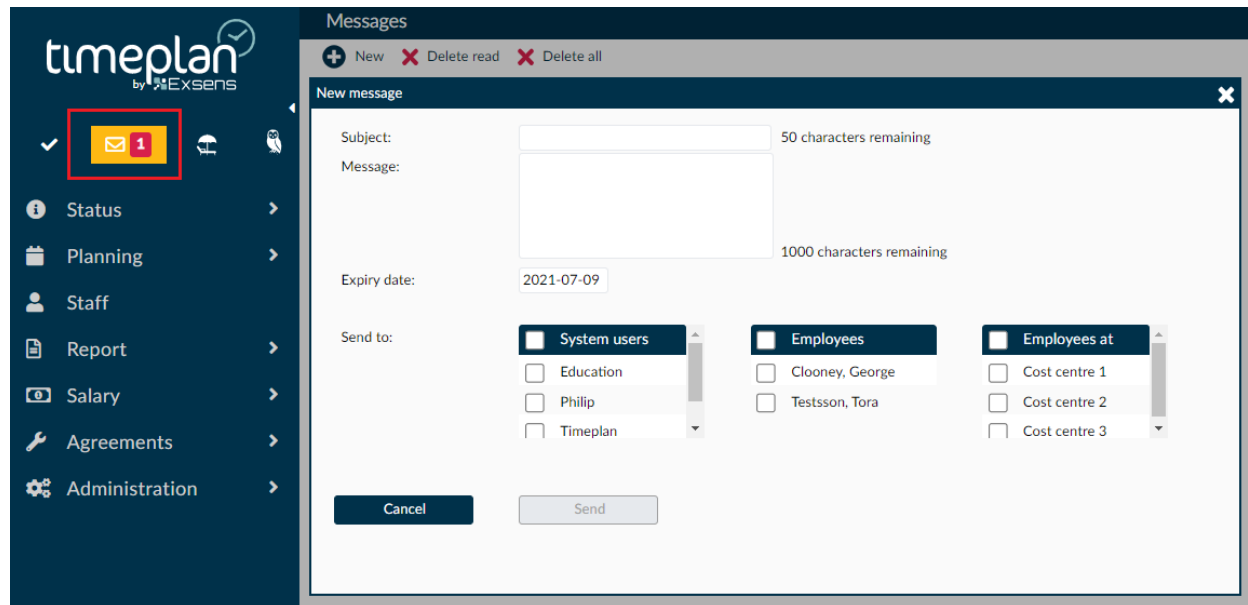
Name	Position	Task time	Last recording
Cost centre			
Öst, Albin	Sales manager	08:00 - 17:00	OUT 2021-03-16 18:00 @ Timeplan
Testsson, Test	Administrator	:00 - 18:00	(no registrations found)
Vinther, Bengt	Support	:00 - 16:30	(no registrations found)
Cost centre 1			
Clooney, George	Administrator	11:00 - 20:00	OUT 2021-07-01 15:00 @ Timeplan
Testsson, Tora	Administrator	:00 - 15:00	(no registrations found)

If you have a lot of temporary personnel, it may be useful to use the **Self-registration** add-on module where the employee can register in the time stamp terminal without first being posted in Timeplan.

Messages

If an administrator wants to send messages to employees, they do so via the **Messages** tab in Timeplan. This will display the message in the app and in the clock.

Go to Messages and press **New+** to write a new message.



The screenshot shows the Timeplan application interface. On the left is a dark blue sidebar with the 'timeplan by EXSENS' logo and a list of menu items: Status, Planning, Staff, Report, Salary, Agreements, and Administration. The 'Messages' tab is highlighted in the sidebar. The main area displays the 'Messages' section with a header bar containing '+ New', 'X Delete read', and 'X Delete all'. Below this is a 'New message' form with fields for 'Subject' (50 characters remaining), 'Message' (1000 characters remaining), and 'Expiry date' (set to 2021-07-09). The 'Send to' section has three columns of checkboxes: 'System users' (Education, Philip, Timeplan), 'Employees' (Clooney, George, Testsson, Tora), and 'Employees at' (Cost centre 1, Cost centre 2, Cost centre 3). At the bottom of the form are 'Cancel' and 'Send' buttons.

You can then choose to send a message to another administrator [then put a checkmark in User], one or more employees regardless of the cost centre, or you can send messages to all employees associated with a specific cost centre [then put a checkmark in Employee at].

In the box next to **Expire date**, determine how long the message should be displayed.

Once you are satisfied, press **Send** and the message will be sent to the selected recipients.

You can also post recurring, automatic messages such as Happy birthday under **Message Template**.

Own notes:

Approvals

Each morning, a certification manager should review the action list in Timeplan in order to minimise the workload before checking and closing the pay period, as well as in order to keep track of additional expenses as much as possible.

Not everyone can certify hours in Timeplan. Usually only department managers and their superiors have this authority.

All stamp deviations outside your allowed limit will be added to the action list automatically where they must be handled.

The screenshot shows the 'Approvals' section of the Timeplan interface. On the left is a sidebar with navigation links: Status (2), Planning, Staff, Report, Salary, Agreements, and Administration. The main area displays a list of actions for 'George Clooney'. The first action is for '2021-06-07 (Monday)' with a task '06:00 - 15:00 (Cost centre 1)'. It has a 'Show day' button and a message 'In registration is missing.'. The second action is for '2021-06-08 (Tuesday)' with a task '06:00 - 15:00 (Cost centre 1)'. It has a 'Show day' button and a message 'Late out registration with overtime code!'. Below this, there is a table of timestamps. The 'Out' timestamp at 17:00 is highlighted with a red box and has a dropdown menu set to 'Overtime'. Other columns show 'In' at 06:00, 'Overtime time' at 02:00, and 'Worked hours' at 02:00. There are buttons for 'New Timestamp' and 'Absence'.

In the top left menu you can see how many actions need to be handled. In the example above, the person has four actions to deal with.

The next step is to select which cost centre to certify hours for. You can select one or more. You can select a date range as well as errors to fix or a history of approved and failed certifications. Once you are satisfied with your choices, press **View**.

This screenshot shows the top part of the 'Approvals' interface. It includes a 'Save' button, a 'Cost centers' dropdown menu with 'Cost centre 1', 'Cost centre 2', and 'Cost centre 3' selected. There are fields for 'From' (2021-06-01) and 'Until' (2021-07-02). A 'Message types' dropdown is set to 'Errors'. An 'Approval states' dropdown menu is open, showing options: 'Not treated' (selected), 'Approved', 'Unapproved', and 'All'. A 'Show' button is located to the right of the dropdowns.

You will then see a list of all actions per employee in alphabetical order.

There are a number of different errors that end up in the action list and below are a few examples. The department manager determines whether an action is to be approved or rejected and all deviations must be reported by the employee.

In the example above, you can see that the employee has clocked in without there being a work shift at that time. You can see the stamps on the left and a list of debited accounts in the middle.

Another common example is an employee who has worked beyond their scheduled shift. In the example below, you can see that the shift was from 6 AM to 3 PM, and the employee clocked in at 6 AM, which is correct, but then the person clocked out at 17:00 PM with the deviation code Overtime. It is now up to the certification manager to determine whether or not the extra 2 hours were officially count and whether or not the employee should be paid for the overtime and if so, how.

To the right, there is a drop-down menu with the following options:

The screenshot shows the 'Approvals' section of a system. At the top, there is a 'Save' button with a checkmark icon. Below this, there are filters for 'Cost centers' (a dropdown menu showing 'Cost centre 1', 'Cost centre 2', and 'Cost centre 3'), 'From' (2021-06-08), 'Until' (2021-07-02), 'Message types' (Errors), and 'Approval states' (Not treated). There is also a 'Show' button and a checkbox for 'Show only dep. managers'. Below the filters, it says 'Number of rows: 1'. The main content area shows a task for 'George Clooney' on '2021-06-08 (Tuesday)'. The task is 'Late out registration with overtime code!' and has a 'Show day' button. The task details show 'Task: 06:00 - 15:00 (Cost centre 1)'. There are two timestamps: 'In' at 06:00 with a deviation code of '(No code)', and 'Out' at 17:00 with a deviation code of 'Overtime'. The status is 'Unmanaged' and there is an 'Add comment' button. At the bottom, there are buttons for 'New Timestamp' and 'Absence'.

Hourly/Extra employees (working only with money)

- **Unmanaged** – No decision has been made and this period will not be included in the salary calculation unless something is done before then.
- **Approved** – The person in charge approves the time stamps and the period is counted for the employee.
- **Not approved** – The person in charge does not accept the time stamp and the period will not be included in the salary calculation.

Monthly employees (working with both time and money)

- **Unmanaged** – No decision has been made and this period will not be included in the salary calculation unless something is done before then.
- **Approved time** – Approve the time, pay out the extra hours worked on time.
- **Approved Money** – Approve the time, pay out the extra worked time as time.
- **Not approved** – The person in charge does not accept the time stamp and the period will not be included in the salary calculation.

It is not recommended to simply reject a time stamp. You should click on **View day** and read your messages and try to find out what has happened in order to be able to approve the time stamp, otherwise you will be leaving the employee without pay for their extra hours for the days they have actually worked extra hours.

NOTE: The choices that appear in the approval list depend on how your Timeplan has been configured and vary from customer to customer.

Own Notes:

Reports

Timeplan has built-in reports to enable customers to find all possible information. To find the different reports, press **Reports** and then select the type of report you want to find from the selections in the left menu. Each report category has a large number of reports to choose from in the drop-down menu that appears.

Employee reports

Without a selection, only one personnel list will be displayed.

Employee reports Here you can try your way forward if you are looking for a specific employee list, for example, to see who has email addresses registered in the system etc. If you cannot find the information you want, you can call support and we will help. This applies to most reports.

Planning reports

Week overview

Shows persons that are scheduled on the chosen time interval or entire cost centres

can also be printed in a simplified version. This can also be printed directly from the tab Planering (Planning)

Monthly overview

and Månadsöversikten (Monthly Overview).

Account Reports

Employee time report

A very useful report!

Shows all time recordings, exception codes, accounts and flextime either for one person or for all persons with the chosen cost center as primary cost center.

Time recordings and accounts report

Shows information about all tasks, stamps and balances within chosen time period.

Only employees with selected cost center as primary will be included in the report.

Account report – per person/cost centre

Shows generated balances according to chosen filter settings.

Employees with selected cost center as primary or secondary will be included in the report.

Report templates

Some reports are easier to interpret if you use a template for them. Report templates are used for filtering which accounts are displayed and can be put into good use for reports such as **Employee time report** to see relevant balances.

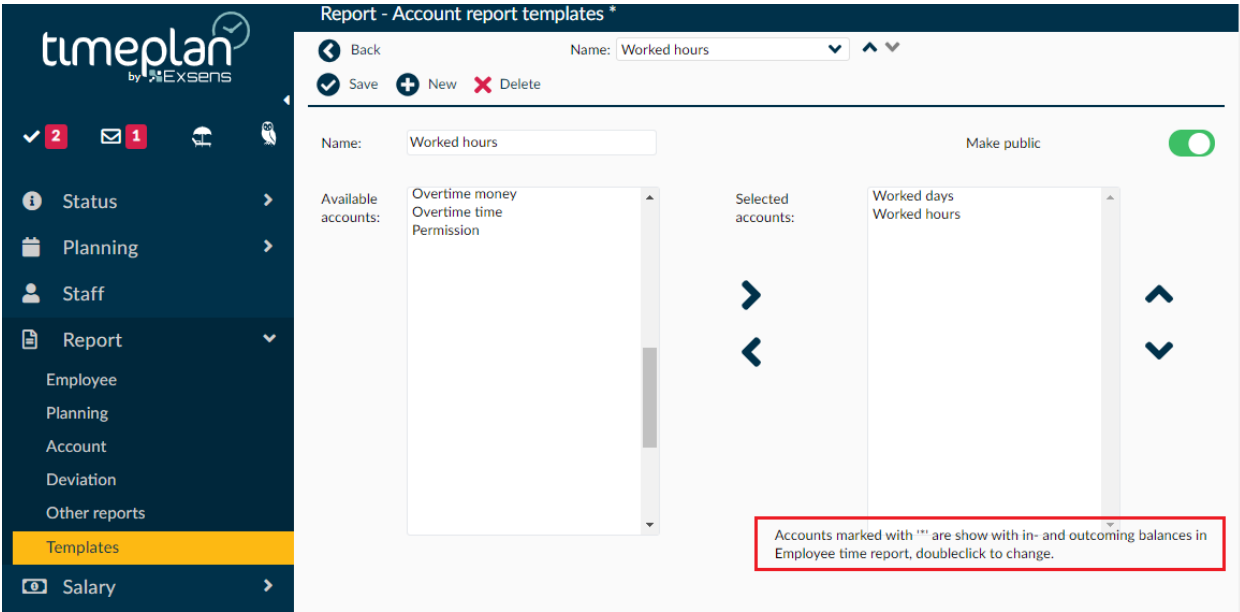
To create a new report template, click **Reports - Templates** and **New+**.

The screenshot shows the 'timeplan by Exsens' interface. On the left, a dark sidebar contains a 'Report' menu with 'Templates' highlighted in orange. The main content area is titled 'Report - Account report templates'. At the top of this area is a '+ New' button. Below it is a table with two columns: 'Name' and 'Available for'. The table contains the following rows:

Name	Available for
-	Everyone
All accounts	Everyone
Deviation	Everyone
Planned time + hours worked	Everyone
Sick	Education
Worked hours	Everyone

You then get a screen where you can transfer the accounts you want to include in your template using the buttons in the middle. If it is one account where you want to see the opening and closing balance per month, double-click on that account when it is in the right column. It then gets an asterisk next to the name. Once you are satisfied with your choices, name your template and press **Save**. After you

save, there will be a button that says **Make public** and pressing it will make your template available to all administrators.



You can now select your template from the drop-down menu **Templates** when selecting how you want to display certain reports.

Own notes:
