

BARRINGTON SOFTWARE INCORPORATED

BSI Labor & Scheduling System

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BSI LABOR & SCHEDULING SYSTEM

Users Manual 9/26/2007

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Basic Operations

This Chapter contains a few basics for getting started.

What is BSI Labor & Scheduling System?

BSI Labor & Scheduling System is a tool for scheduling employees and estimating and calculating the labor costs of your establishment - store, restaurant, office, factory etc. Employees can clock-in and clock-out by use of the included software time clock. The software time clock supports multiple clock-in/clock-outs in a single day by multiple customers or jobs.

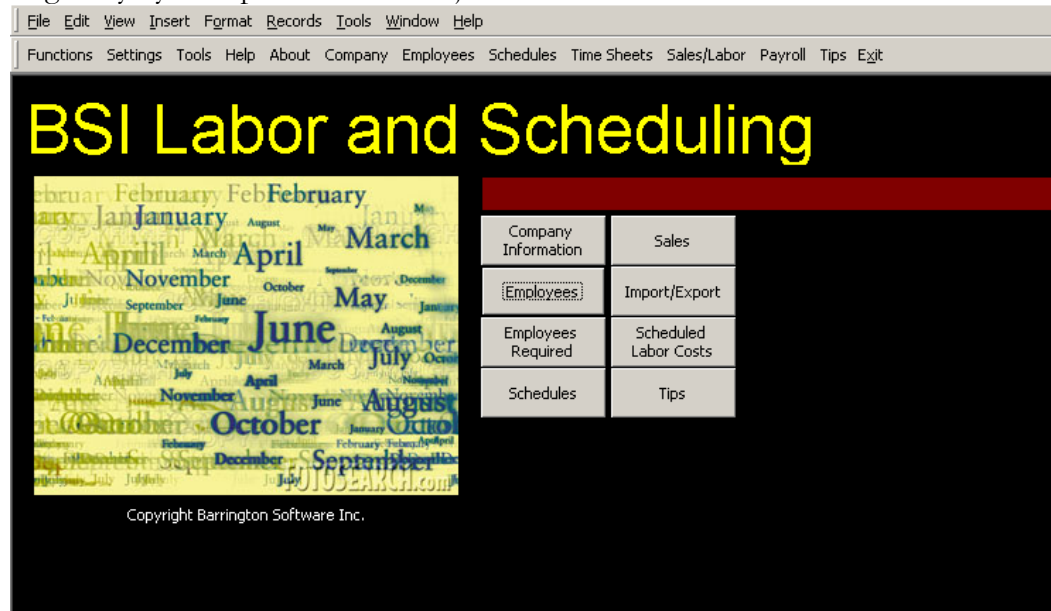


Illustration 1 Switchboard

This is the form you will see when you bring up the BSI Scheduling System. From this form, you can access any feature of the program.

Components

BSI Labor & Scheduling System includes the following components:

Forms

The program includes forms for entering and storing company information and employee information. “Form” and “View” are used interchangeably in this document.

Navigation buttons are located at the bottom of the form window on all of the forms and sub forms containing multiple recipes or ingredients. You can use these buttons to quickly move between records. The far-left button goes to the first record; the left button goes back one record; the right button goes forward one record, and the far right button goes to a new record. The number displayed between the left and right buttons, is the current record or recipe.

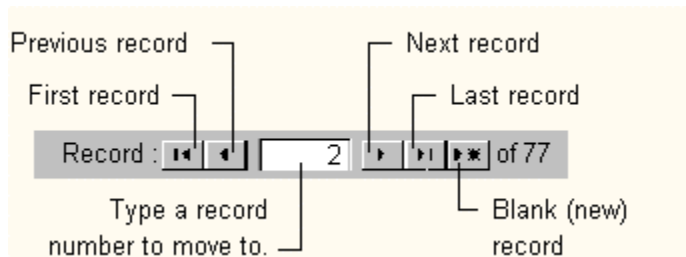


Illustration 2: Use Navigation buttons to page through recipes or ingredients.

A Menu Bar that includes dropdown menus for Functions, Tools, Help, About, Company, Employees, Schedule, and Sales is available at the top of each form.

Tool Bars

A Tool Bar, unique to each form is at the top of the screen when any form is displayed. Each icon is described with text to the right of the icon. At the far right on the toolbar, click on the “down arrow” to view **‘More Buttons’**.

To resize a form, position the cursor on the edge of the form. When you see an arrow, hold down the left button of the mouse and drag the form to the desired size.

How To Use The Mouse

Move the Mouse on a flat surface in order to position the cursor. Click the left button on the mouse to secure the position of the cursor. When instructions are not otherwise specified that refer to clicking, you should click the left button on the mouse.

Password Administration

An administrator can assign passwords to employees who will be allowed to access the BSI Labor & Scheduling System. There are two levels of security: Administrators and Users. Only Administrators are allowed to go to the Password Administration form.

The screenshot shows a web application window titled "Password Administration" with a close button (X) in the top right corner. The BSI logo is in the top left. The main heading is "Select Name to Update Security Profile". A list box contains "Administrator myName". To the right of the list are buttons for "Add/Update", "Delete", and "Clear". Below the list are several input fields: "Login" (myLogin), "Password" (myPassword), "Name" (myName), "Location" (myLocation), "Phone or Extension" (000-000-0000), "Security Class" (User), and "e-mail" (me@myLocation.com). A "Done" button is in the top right corner of the form area.

Illustration 3 Use this form to assign passwords.

Setting Up

Enter Company Information

Click 'Company Information' from the Main Switchboard. Enter the name and address of your establishment. When you enter a social security rate, this amount will be added to your (computed) labor costs and payroll for salaried employees.

The labor cost percent goal refers to your goal for the percent of total sales for a period that will go for labor costs or payroll costs.

Continue through each tab to enter: departments, job titles, work shifts and needed skills.

The screenshot shows a software window titled "Company Information" with several tabs: "Site Information", "Departments", "Job Titles", "Work Shifts", and "Needed Skills". The "Site Information" tab is active. The form contains the following fields and values:

Site Name	Address		
MyCafe	100 Main Street		
City	State	ZipCode	Phone
OurTown	IL	00000	000-000-0000
Fax	webpage		
000-000-0000	www.cooker.com		
Social Security/Medicare Rate	12.00%	Payroll Percentage Goal	17.00%

Illustration 4: Enter Site Information

Enter Departments

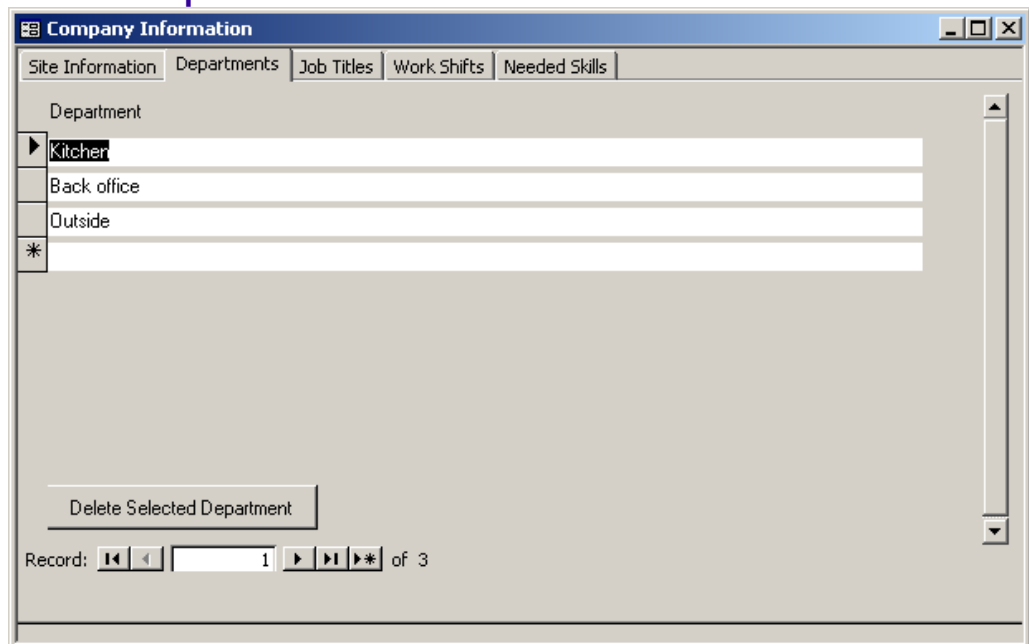


Illustration 5 Enter Departments

Enter the departments and when you plan a schedule, you can select a department.

Enter Job Titles

The screenshot shows a software window titled "Company Information" with a blue header and a close button in the top right corner. Below the header are five tabs: "Site Information", "Departments", "Jobs", "Work Shifts", and "Needed Skills". The "Jobs" tab is selected. The main area contains a table with four columns: "Job Codes", "Job Titles", "Rate (Per Hour)", and "Overtime Rate (Per Hour)". The table has 9 rows, with the last row containing an asterisk in the Job Codes column. Below the table is a "Delete Selected Job" button. At the bottom, there is a record navigation bar with the text "Record: 7 of 8" and several navigation icons.

Job Codes	Job Titles	Rate (Per Hour)	Overtime Rate (Per Hour)
1	Manager	\$10.00	\$15.00
2	Block	\$6.00	\$9.00
3	Cook	\$6.00	\$9.00
4	Dishwasher	\$6.00	\$9.00
5	Salad	\$6.00	\$9.00
6	Server	\$6.00	\$9.00
7	Meat Cutter	\$6.00	\$9.00
8	Hostess	\$6.00	\$9.00
*			

Illustration 6 Enter Job Titles

Enter all job information for your establishment on this form. If you complete this information, the program will use rate information to calculate labor costs and payroll for employees with a corresponding job code on their timesheet. This same job information will be available from each employee's record where individual rates for each job can be assigned to an employee.

Enter Work Shifts

	Time In	Time Out	Hours:
▶	7:00 AM	12:00 PM	5
	8:00 AM	4:00 PM	7.5
	10:00 AM	2:00 PM	4
	12:00 PM	4:00 PM	4
	4:00 PM	10:00 PM	6
	5:00 PM	10:00 PM	5
	5:00 PM	12:00 PM	7
*			0

Record: 1 of 7

Illustration 7 Enter the Work Shifts

Enter each work shift and the total hours to be paid for that shift. If the shift is 8:00 AM - 4:00 PM, as in the 2nd entry above, but a 1/2-hour unpaid lunch period is included in those eight hours, enter 7.5 hours in the last column. This hours information is used for calculation of schedule cost estimates. Actual time is calculated by subtracting clock-in times from clock-out times. Work shifts are also available from drop-down lists when planning a schedule, but scheduled beginning and end times can be modified for an individual employee.

Enter Needed Skills

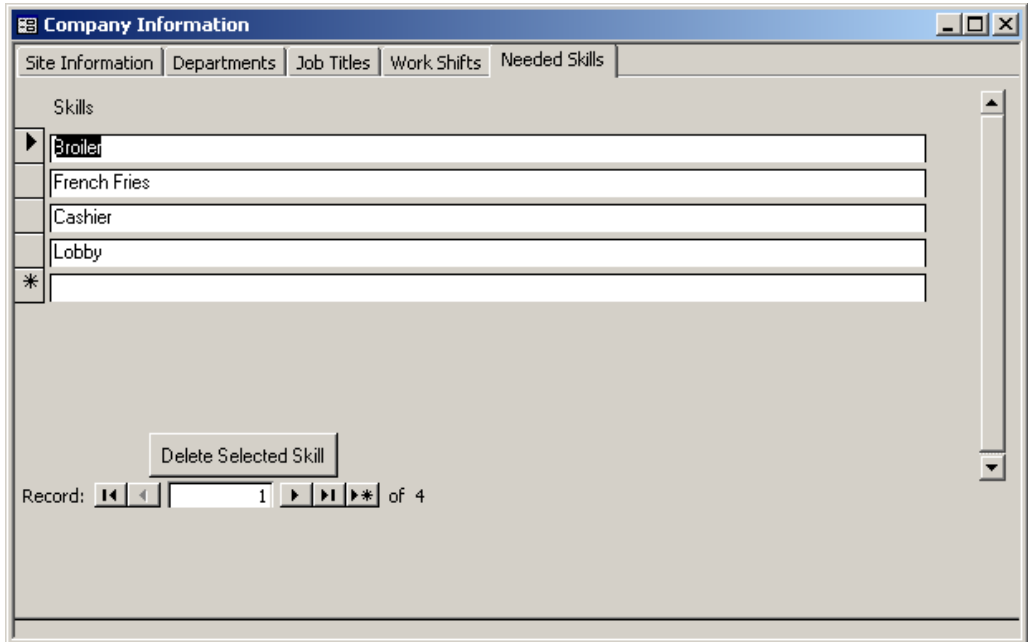


Illustration 8 Enter Needed Skills

Enter needed skills. You will be able to specify an employee's skills from a drop down list and refer to this when planning a schedule.

Set Up Stores/Cost Centers

When all Company Information is entered, go to Company-Stores/Cost Centers and enter information for each store/cost center in your company.

StoreId	
01	
Store Name	
MyStore	
Address 1	
100 Main Street	
address 2	
City	
MyTown	
state	region
MyState	Mid-West
zip	Phone
00000	000-000-0000
e-mail	
me@mybusiness.com	
contact Name	
Joe Smith	

Illustration 9 Information is entered for each Store/Cost Center and each employee is assigned to a Store/Cost Center

Enter Employee Information

The screenshot shows a web-based form for entering employee information. The form is titled "Employees" and has several tabs: "Work Information", "Personal Information", "Picture", "Skills", "Availability", "Emergency Contact", and "Jobs". The "Work Information" tab is currently selected. The form contains the following fields and values:

Employee Number	3030	Hire Date	01/01/2007
FirstName	Joe	Next Review Date	01/01/2008
LastName	Smith	Termination Date	
Department	Cook	Store/Cost Center	Western Sizzlin
Job Title	Cook	Billing Rate	\$0.00
Reports To	Manager	Billing Multiplier	0
Hourly Rate	\$6.00	Overtime Rate	\$0.00
		Max Regular Rate Hours	0
T-Clock Password	*****	Salaried	<input type="checkbox"/>
		Annual Salary	\$0.00
Notes			

Illustration 10: Enter Employee Information

Select the Store/Cost Center to which the employee is assigned. If the employee is billed to customers, you can enter the 'Billing Rate' or the 'Billing Multiplier' but not both. For instance, if an employee is paid an hourly rate of \$6.00 and billed out at \$9.00, you can enter the \$9.00 in 'Billing Rate' or you can enter 1.5 in the 'Billing Multiplier' field.

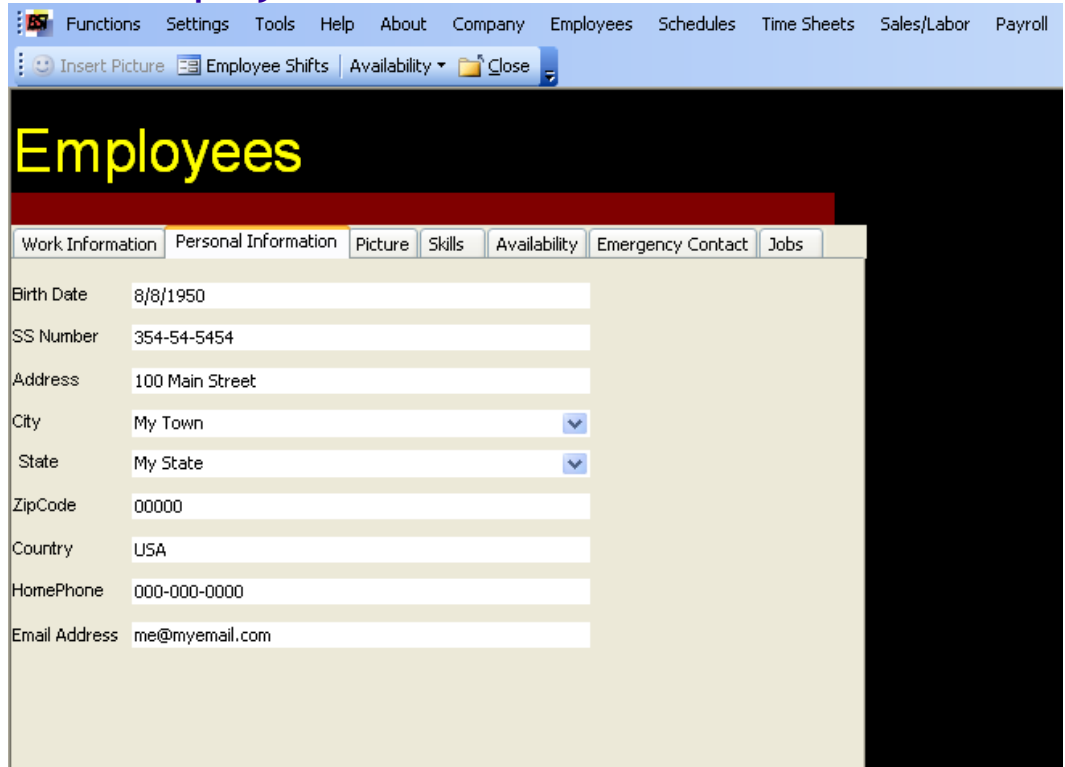
Some basic employee information can be saved in excel format. Go to 'Employees' from the switchboard and click 'SaveInExcel' on the toolbar.

Employee hourly salary and overtime salary will be used when calculating forecasted and actual labor costs. The cost for hours worked over the number entered in 'Max Regular Salary Hours' will be calculated using the overtime rate. If 'Salaried' is checked, the annual salary figure will be used instead of hourly and overtime rates. An hourly rate, based on 40 hrs per week for 52 weeks, is calculated. The employee rates are overridden by Job rates entered in the Company information and Job rates are overridden by Employee's individual Job rates entered under the Jobs tab. It is possible to activate daily overtime calculations in the Settings->timekeeping/Start Day of Week/Journaling view. In addition to weekly over-time calculation based on the entered start of week, any time over the daily overtime maximum is calculated as overtime if this option is set.

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Each employee can be assigned a time-clock password allowing them to sign in and out. The software time clock accepts either an employee's employee Id or password to gain access to time clocking.

Enter Employee's Personal Information



The screenshot shows a web browser window with the following elements:

- Menu bar: Functions, Settings, Tools, Help, About, Company, Employees, Schedules, Time Sheets, Sales/Labor, Payroll
- Browser tabs: Insert Picture, Employee Shifts, Availability, Close
- Page title: Employees
- Form tabs: Work Information, Personal Information (selected), Picture, Skills, Availability, Emergency Contact, Jobs
- Form fields:
 - Birth Date: 8/8/1950
 - SS Number: 354-54-5454
 - Address: 100 Main Street
 - City: My Town (dropdown)
 - State: My State (dropdown)
 - ZipCode: 00000
 - Country: USA
 - HomePhone: 000-000-0000
 - Email Address: me@myemail.com

Illustration 11 Enter employee's personal information: birth date, social security number, address, and phone number.

Employee's Picture

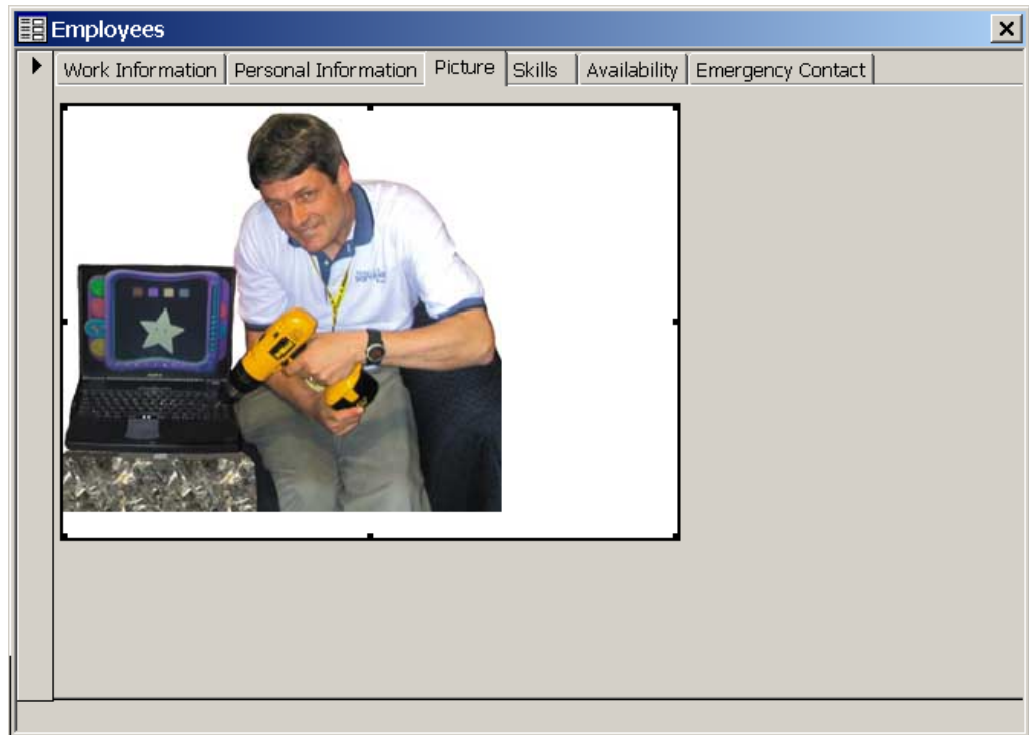


Illustration 12 You can use this tab to store a picture of the employee.

Employee Skills

Skill	Skill Level
Broiler	Excellent
French Fries	Good
Lobby	Excellent
*	

Record: 1 of 3

Illustration 13 Enter the employee's skills and skill level. Use this information when making a schedule.

Employee Availability

Days Available	Times Available		Times Preferred	
	In	Out	In	Out
Sunday	6:00 AM	5:00 PM	7:00 AM	12:00 PM
Monday	5:00 AM	11:00 AM	7:00 AM	11:00 AM
Tuesday	7:00 AM	2:00 PM	8:00 AM	10:00 AM
Wednesday	6:00 AM	4:00 PM	7:00 AM	11:00 AM
Thursday	7:00 AM	3:00 PM	8:00 AM	11:00 AM
Friday	1:00 PM	6:00 PM	2:00 PM	5:00 PM
Saturday	2:00 PM	6:00 PM	2:00 PM	5:00 PM
*				

Record: 1 of 7

Illustration 14 Employee Availability

Enter employee availability and preferences. The computer automatically flags assigned times that are not within range of available and/or preferred times. The flag can be overridden and any time scheduled for an employee. Employee availability can be previewed by employee or by day.

Employee Emergency Contact

The screenshot shows a software window titled "Employees" with a close button (X) in the top right corner. The window has several tabs: "Work Information", "Personal Information", "Picture", "Skills", "Availability", and "Emergency Contact". The "Emergency Contact" tab is currently selected. The form contains the following fields and controls:

- Employee Number: Text box containing "1"
- Relationship: Text box
- First Name: Text box
- Last Name: Text box
- Address: Text box
- City: Text box
- State: Text box
- ZipCode: Text box
- HomePhone: Text box
- WorkPhone: Text box
- Email: Text box
- Same Address As Employee: A checkbox that is currently unchecked.

At the bottom of the form, there is a record navigation bar that reads "Record: [Previous] [Next] 1 [End] of 1".

Illustration 15 Enter employee's emergency contact information. Check the box if the information is the same as the employee's home information.

Employees Required

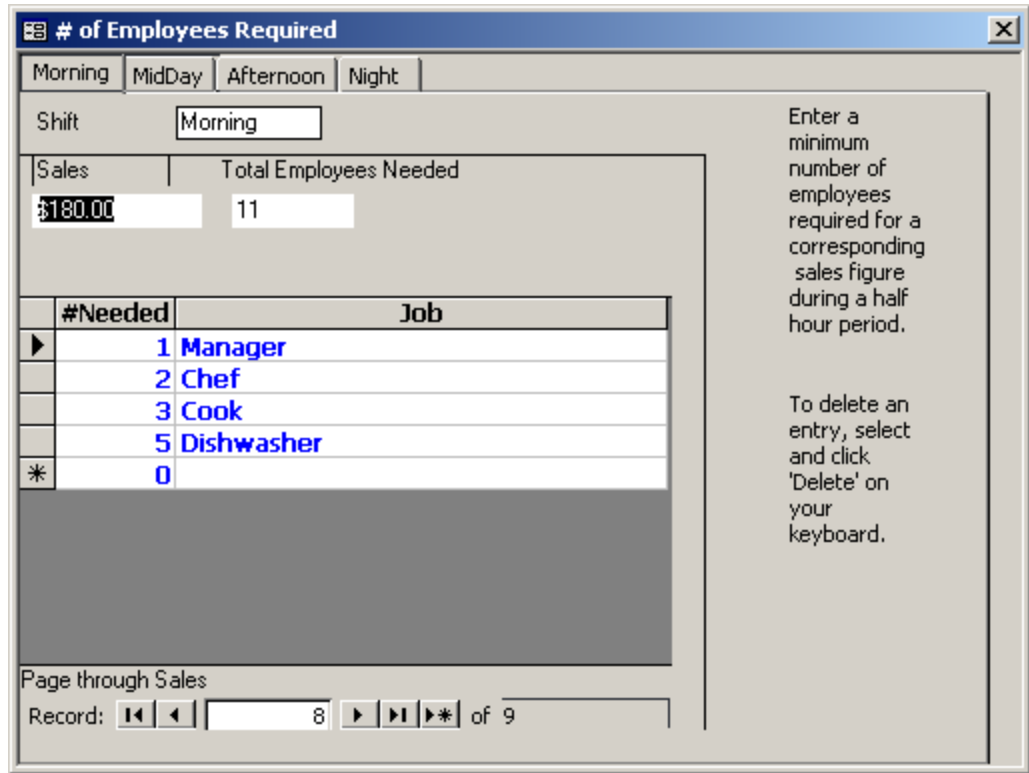


Illustration 16: Enter the Number of Employees Required.

Enter the total number of employees required for a corresponding dollar amount of sales to take place efficiently. Enter the breakdown of employees. The program will tell you how many employees are needed for a forecasted sales period.

Time Keeping - Start of Week - Journaling Options

Go to Settings->Select Time Keeping/Start of Week/Journaling Options.

‘Select Payroll Start Day’ starts the week for the purpose of determining when overtime starts. If an individual’s employee record shows ‘Maximum Regular Hours’ of 40, the start day is set for Monday, and that employee works 12 hours each day (Monday, Tuesday, and Wednesday), on the next day worked, before the next Monday, anything after the first 4 hours will be at the overtime rate. If ‘Apply Daily Overtime’ is checked and ‘Maximum Regular Daily Hours’ is set to 8, the same employee will be paid at the overtime rate for 4 hours on each day he works 12 in addition to over time hours worked in the week over 40.

A separate time-clock application comes with your program and must be installed. Select how you want your employees’ time-in and time-out readings to be rounded. For instance, if you select ‘Round Up to Next 15 Minutes’ and your employee clocks in at 8:03 AM, the actual time recorded will be 8:15 AM. If you select ‘Round to Nearest 15 minutes, the time recorded will be 8:00 AM.

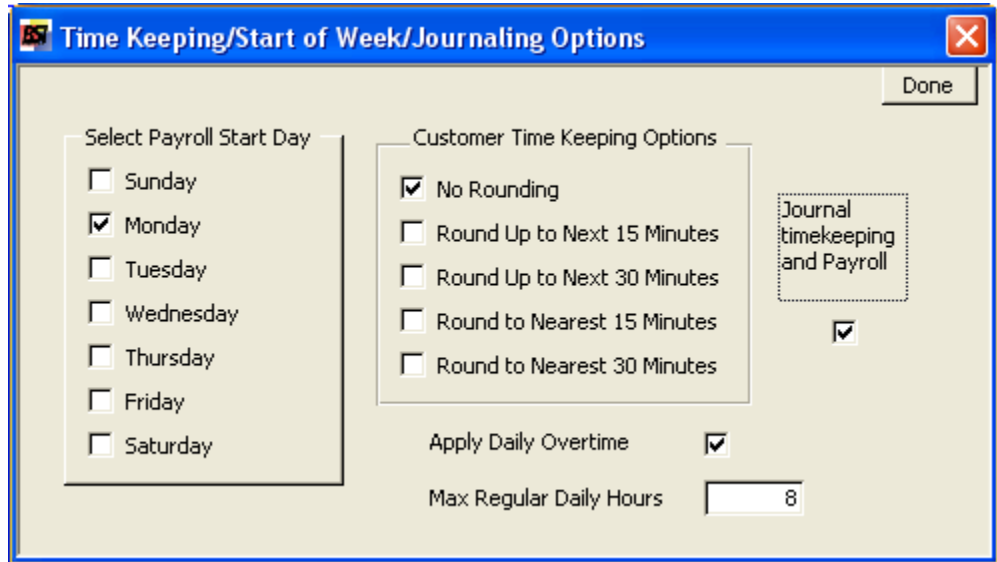


Illustration 17 Make Time-Keeping Selections by going to Settings->Time Keeping/Start of Week/Journal Options

Payroll

Set Pay Period by selecting Weekly, Every Two Weeks, or Once a Month. Also, Select a Pay Period Start Date. Create pay period records by clicking the box. Pay periods can only be created after the last pay period ending date.

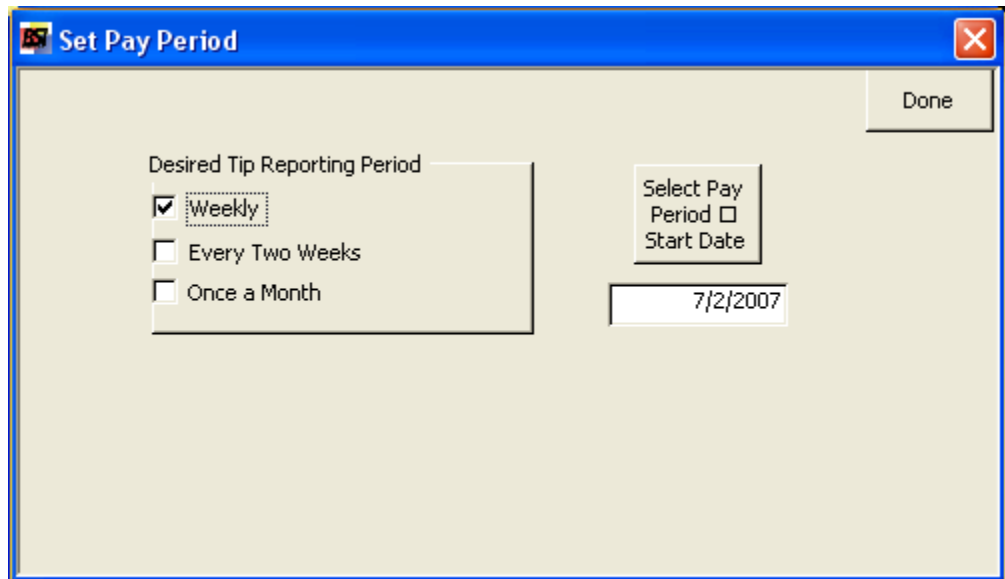


Illustration 18 Select the pay period frequency and a start date.

Tips

Set Tip Period by selecting Weekly, Every Two Weeks, or Once a Month. Also, Select a Tip Period Start Date. Tip periods can only be created after the last ending TRAC period date.

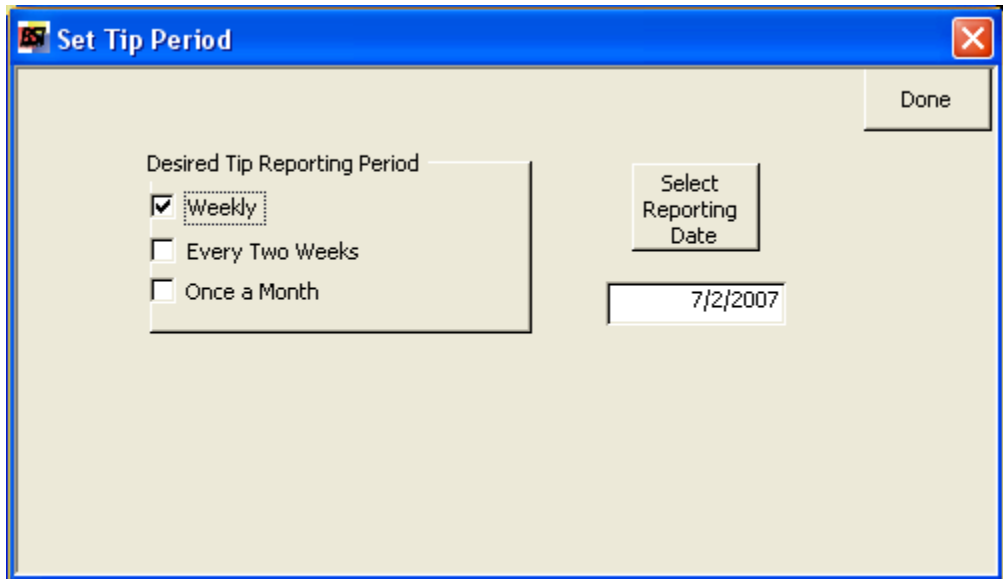


Illustration 19 Select the tip period frequency and a start date.

Importing and Exporting

Employees

Employee information can be exported encrypted (.enc) or in a choice of formats, including xml. The employee information can also be imported encrypted or unencrypted. When importing an encrypted file, you will be asked if you want to save the file unencrypted first so the information can be examined before importing.

Time Sheets

Time Sheets can be exported encrypted (.enc) or in a choice of formats, including xml. The Time Sheets can also be imported encrypted or unencrypted. When importing an encrypted file, you will be asked if you want to save the file unencrypted first so the information can be examined before importing.

Payroll

Payroll can be exported encrypted (.enc) or in a choice of formats, including xml. The Payroll can also be imported encrypted or unencrypted. When importing an encrypted file, you will be asked if you want to save the file unencrypted first so the information can be examined before importing.

Purpose of Above export/imports

The above export/imports are available from BSI Labor & Scheduling and can be used to e-mail or transport sensitive information securely. Encryption is by default “private key”. A Private key is a word known to the sender and receiver that is used to encrypt and then un-encrypt information. You can set the private key in Settings->Capture and Maintenance settings. If other than the default is used, the exporter and the importer must have the same private key setting.

Importing Sales

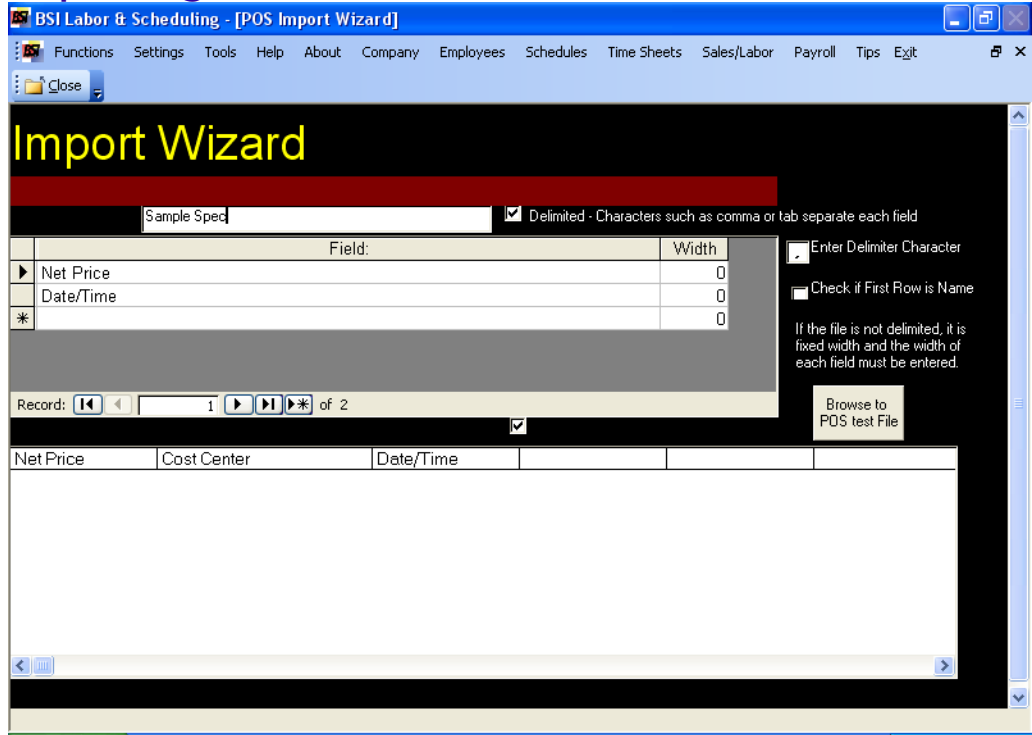


Illustration 20 Use an Import Wizard to create specifications for a **sales information** file that you would like to import or for a **time in/out file** that you would like to import. Barrington Software Inc. will provide support when you do this or, for a reasonable fee, we will do it for you.

Using Import Wizards

The wizards allow the user to set the import specifications, making possible the import of sales information from most POS hardware and employee in/out punch times as well as other employee information from many third party vendors. If needed, support will be provided for setting specifications, and for a small charge we will create the specification for you. Creating the specification is a one-time activity and the same specification will be used each time you import your POS Data.

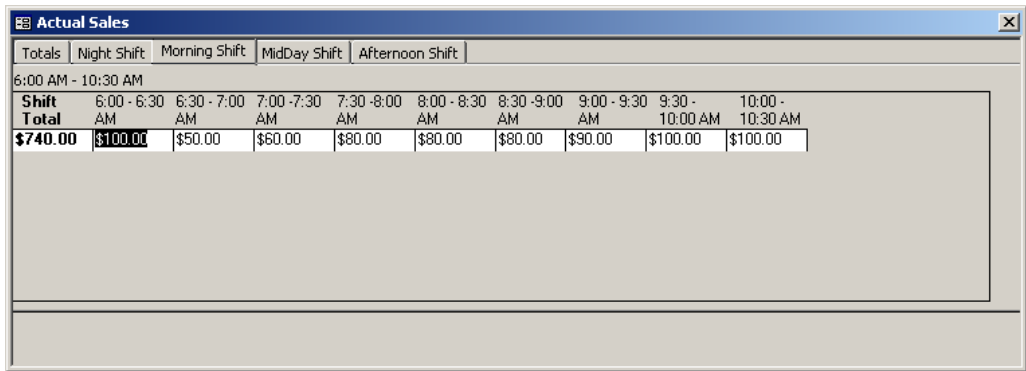
When you are finished, you can import the file by selecting 'Import POS File' from the tool bar at the top of the page. You will be able to use this specification each time you import data. You can also export and import the specifications.

Follow these instructions to create a specification:

- Click 'Import Wizards' from the Functions menu on the left side of your view.

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- Select Sales Import->Add Sales Import spec
- Enter a Name for the Specification, such as the name of your POS provider.
- Identify the file you want to import. (Your vendor should have a Sales Data file that can be exported and provided for import. Browse to this file from the wizard).
- If this file is delimited (Characters such as commas or tabs separate each field), check the delimited box and enter the character. If this is not a delimited file, it is a fixed width file and the width of each field must be entered.
- Select the fields in the order they occur in the file and enter the width, if the file is not delimited.



The screenshot shows a window titled 'Actual Sales' with a tabbed interface. The 'Totals' tab is selected. Below the tabs, the text '6:00 AM - 10:30 AM' is displayed. The main area contains a table with the following data:

Shift	6:00 - 6:30 AM	6:30 - 7:00 AM	7:00 - 7:30 AM	7:30 - 8:00 AM	8:00 - 8:30 AM	8:30 - 9:00 AM	9:00 - 9:30 AM	9:30 - 10:00 AM	10:00 - 10:30 AM
Total	\$100.00	\$50.00	\$60.00	\$80.00	\$80.00	\$80.00	\$90.00	\$100.00	\$100.00

Illustration 21 Sales for 1/2 Hour Periods

Enter or imported sales data is grouped in 1/2-hour periods. You can select a period (a day) of actual sales data to be used as forecasting data when planning a schedule. The forecasted data will provide the number of employees needed for each time period if you have properly entered the required number of employees for each sales level.

Time-Keeping/Employee/Tip Import Wizards

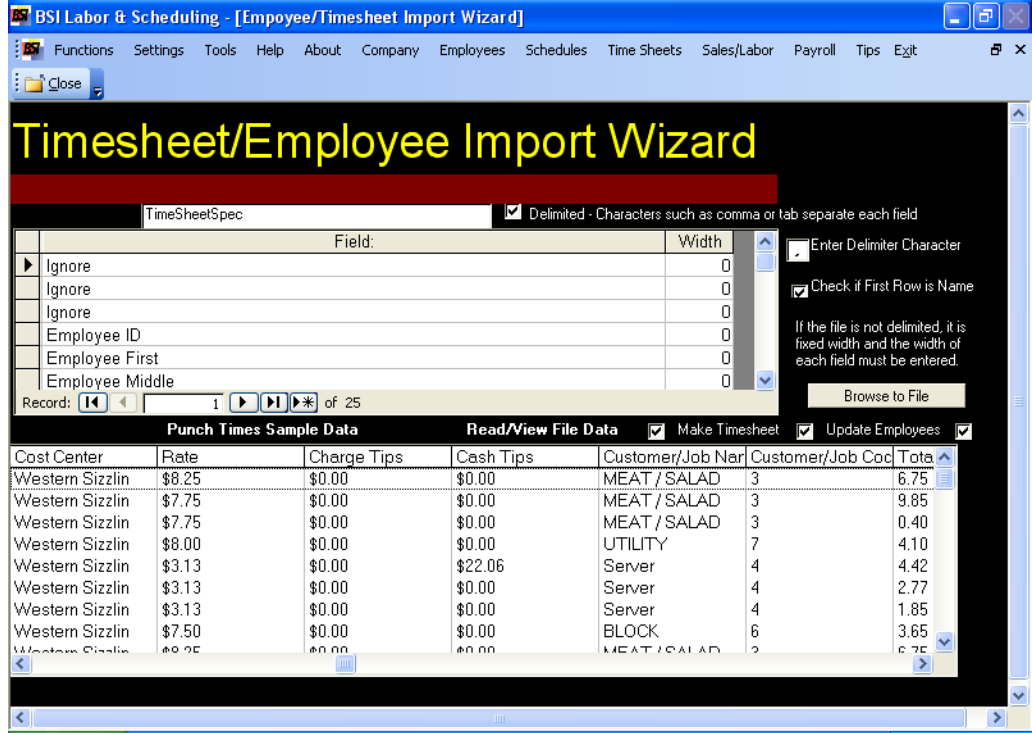
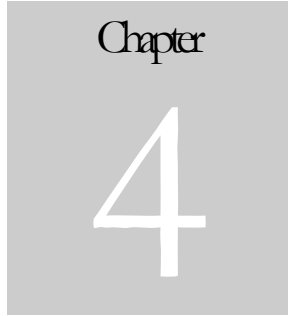


Illustration 22 Time-Keeping/Employee/Tip Import Wizard

This wizard works in much the same way as the Sales Import wizard, but works the above information instead of Sales.

This import wizard can be used to import and/or maintain basic employee information from any third party system that is able to export in a regular text format. It is also able to import time clock information from third party time clocks, timesheets, or any biometric device. This information can be used as imported or recalculated using information already in the database. In its simplest form, the import wizards can create timesheets from a file with only employee Id. Timesheets are created with basic employee information for each imported employee Id. When time in/time out information is entered, pay is calculated taking into account rates and settings in the database.

For hospitality customers, tips can be imported with just Employee Id to produce periodic TRAC reporting.



Schedules

Making a Schedule

The screenshot shows the 'Schedule' window in the BSI Labor & Scheduling 3.04 software. The window title is 'BSI Labor & Scheduling 3.04 - [Schedule]'. The menu bar includes: Functions, Settings, Tools, Help, About, Company, Employees, Schedules, Time Sheets, Sales/Labor, Payroll, Tips, Exit. The toolbar contains: Preview, Email, SaveInHTML, Availability, View Labor Costs, Forecasted Sales, Delete Entry, Close.

The main area is titled 'Schedule' in yellow. Below the title, there are input fields for:

- Period: Demc
- Start Date: Tuesday, September 20, 2005
- Department: Kitchen
- Prepared By: rk

 There are also instructions: 'Double click Day1, Day2 etc. to view that day's schedule.' and 'Double click Start, etc. to view that day's availability.'

The main data table is as follows:

Emo Number	Name	Position	Day1	Start	End	Working Shift		Day3	Start	End	
						Day2	Start				
1	Sample	Sample Chef	9/20/2005	2:00 AM	5:00 AM	9/21/2005	8:00 AM	2:00 PM	9/22/2005	4:00 AM	8:00 AM
2	Wyatt	Sample Cook	9/20/2005	4:00 PM	8:00 PM	9/21/2005	4:00 AM	8:00 AM	9/22/2005	4:00 AM	8:00 AM
2	Wyatt	Sample Cook	9/20/2005	8:00 AM	12:00 PM	9/21/2005	8:00 AM	2:00 PM	9/22/2005	8:00 AM	12:00 PM
3	Tony	Sample Cook	9/20/2005	4:00 AM	8:00 AM	9/21/2005	8:00 AM	2:00 PM	9/22/2005	8:00 AM	12:00 PM
4	Joseph	Sample Dishwasher	9/20/2005	12:00 PM	4:00 PM	9/21/2005	12:00 PM	4:00 PM	9/22/2005	12:00 PM	4:00 PM
4	Joseph	Sample Dishwasher	9/20/2005	4:00 PM	8:00 PM	9/21/2005	4:00 PM	8:00 PM	9/22/2005	4:00 PM	8:00 PM
*			9/20/2005			9/21/2005			9/22/2005		

Illustration 23 Employee Schedule

Click Schedules->Add a New Schedule from the toolbar and fill in Period, which can be the range of dates or some identifying name, i.e., “Thanksgiving Week”, enter the start date (you can use the wizard to select a date), select the department, and enter your name or initials. Click ‘Enter Details’ and the scheduling form will come up. It will already have the days filled in; assign staff, using the drop down lists. Select an employee number and name and position will be filled in. Select a start time and the end time for that shift will be added. If the employee works earlier or later than the beginning or end time of the shift, you can change the either to correctly calculate the cost. The beginning or end times will show in red when it is different from the actual

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start or end time of the shift. You can access 'Forecasted Sales' to determine the number of staff needed and view a report of availability by day or by employee to determine the staff members available. The computer automatically flags employee availability and preference times during the scheduling process. These are suggestions and can be overridden by the scheduler.

You can print, email, or save this schedule in html format. When you e-mail, all of the emails of scheduled employees are included in the email list. You can also use the schedule to make another schedule (Save As Schedule) or use this schedule to calculate labor costs.

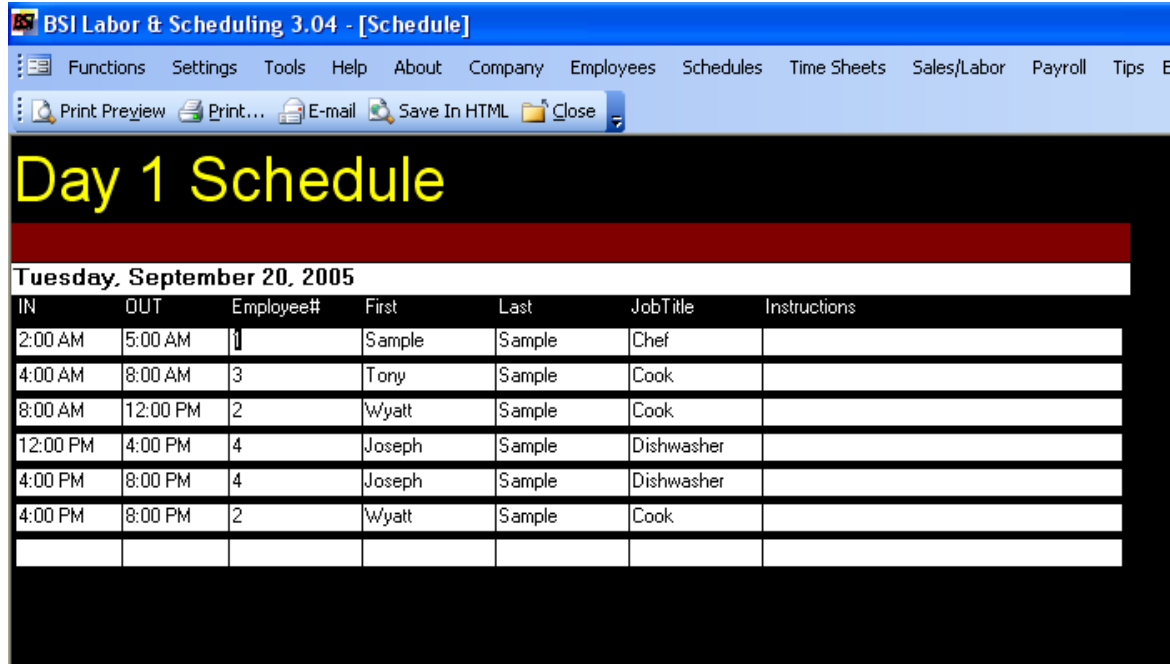


Illustration 24 Double click a schedule day to view that days' schedule in the above format. You can print, email, or save this schedule in html format.

Forecasted Sales

Totals	Night Shift	Morning Shift	MidDay Shift	Afternoon Shift					
6:00 AM - 10:30 AM									
	6:00 - 6:30 AM	6:30 - 7:00 AM	7:00 - 7:30 AM	7:30 - 8:00 AM	8:00 - 8:30 AM	8:30 - 9:00 AM	9:00 - 9:30 AM	9:30 - 10:00 AM	10:00 - 10:30 AM
Shift	Double click total number of employees needed per 1/2 hour, based on 2nd column of projected sales, to view d								
Total	4	4	6	6	6	6	6	10	5
\$709.50	\$39.95	\$39.95	\$69.95	\$79.95	\$89.95	\$79.95	\$89.95	\$169.90	\$49.95

Illustration 25 Forecasted Sales You can double click the total number of employees for a time slot to view the breakdown of employees by job.

After selecting a past day of sales to use as the forecast for the day you are scheduling, you can view the number of staff needed as you plan the schedule.

Available Employees

Employee Availability By Day							
Sunday				Times Available		Times Preferred	
Employee#	LastName	FirstName	JobTitle	IN	OUT	IN	OUT
1	Sample	Jacob	Chef	6:00:00 AM	5:00:00 PM	7:00:00 AM	12:00:00 PM
2	Sample	Wyatt	Cook	6:00:00 AM	5:00:00 PM	12:00:00 PM	4:00:00 PM
3	Sample	Tony	Cook	1:00:00 PM	8:00:00 PM	1:00:00 PM	6:00:00 PM
4	Sample	Joseph	Dishwasher	4:00:00 PM	11:00:00 PM	4:00:00 PM	10:00:00 PM

Illustration 26 Report of availability by day.

Time keeping and Payroll

Time keeping

See information in Chapter 2, Setting Up, for instructions on the initial setup of time keeping.

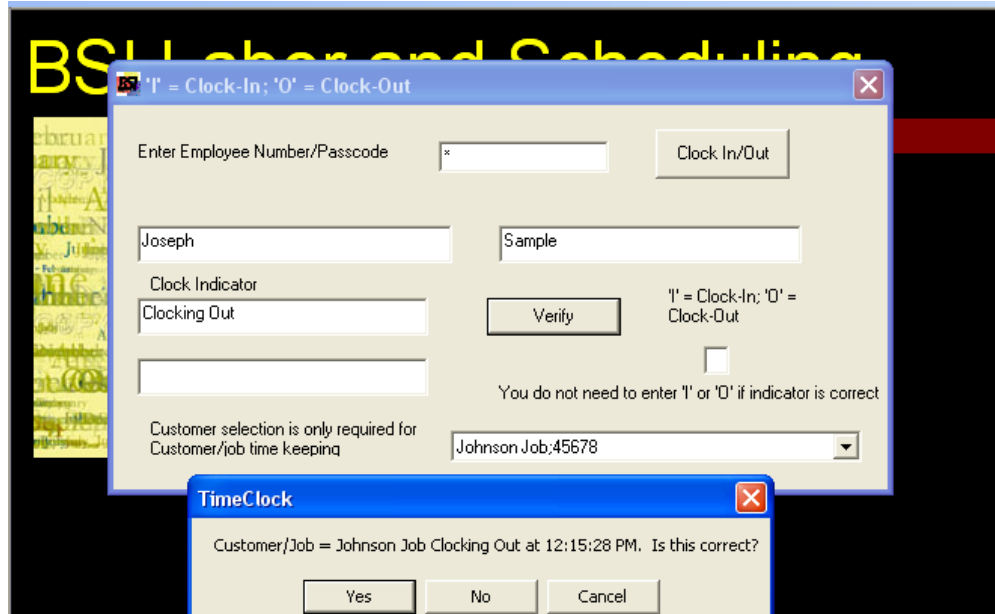


Illustration 27 Employees can clock in and out on a desktop computer just by entering their employee number and clicking the Clock In/Out button.

The software time clock can be installed on any computer that has a network connection to the computer that Labor and Scheduling is installed on. If multiple time clocks are desired with the capability of clocking in over a LAN/WAN connection, BSI Labor & Scheduling should be installed to a shared folder on the network. The file BSITimeClocking.exe is installed into the shared folder and this file can be used to install the time clock on any client computer that can see the shared folder. The time clock database is password secured. Real time access to time clock information lets you know instantly who is not clocked in today yet and who is still clocked in today.



Illustration 28 Clock In/Out (Punch Times) can be viewed and edited.

Time sheets are made automatically when an employee logs in and logs out. A time sheet can also be made manually by going to Time Sheets -> Create Time Sheets. Users can view time sheets by employee, schedule, or date range. Users can also 'Link an Employee's Time Sheet to a Schedule' when that employee is not on the original schedule. This will show on the Labor Exception Report.

A customer record can be established by going to Time Sheets>Customers/Jobs For Timekeeping. The customer can be linked to particular employees' time sheets by the customer selection drop-down box in the employee's time sheet.

See Chapter 3, Importing and Exporting, for information on importing and exporting time sheets.

Payroll

See information in Chapter 2, Setting Up, for instructions on the initial setup of payroll.

BSI Labor & Scheduling - [Edit Payroll]

Functions Settings Tools Help About Company Employees Schedules Time Sheets Sales/Labor Payroll Tips Ex

Close

Edit Payroll

beginPeriodDate	endPeriodDate	Employee ID	EmpFirst
6/28/2007	7/11/2007 11:59:59 PM	4087	AMY
empMiddle	empLast	jobTitle	
	M		
SSNumber	Address	City	
State	zipCode	country	EIN
			00-00000
Department	Store/Cost Center ID	Store/Cost Center	
		Western Sizzlin	

Regular Hours	Overtime Hours	Regular Pay	Overtime Pay	Tips Charge	Tips Cash	SSN Medicare Tax
27.41	0	\$164.46	\$0.00	\$0.00	\$115.00	\$0.00

Make Inactive Calculated From In/Out Times

Payroll Detail	Total Tips	Pay Total
	\$115.00	\$279.46

Record: 6 of 6

Illustration 29 Payroll records can be edited.

See Chapter 3, Importing and Exporting, for information on importing and exporting payroll.

Interfaces

TEC Users

TEC Crystal Point users can export a schedule in .txt format ready for import. Go to Import/Export from the Main Switchboard, click Export Files and a form will open. You will be allowed to browse to the folder where you would like the file to be placed.

Users of TEC 2700/3600/3700 can get periodic sales, TRAC reports, payroll, and punch times (clocking In/Out times) through POS Store & Forward if that product is installed and set up to collect the information from the register. The punch times can be used to create time sheets.

Pay rate will be imported when a new employee record is imported. If the pay rate is changed in BSI Labor & Scheduling, the new rate entered will be used when creating time sheets in the future even if the register rate has not been updated. The payroll is generated from the timesheets.

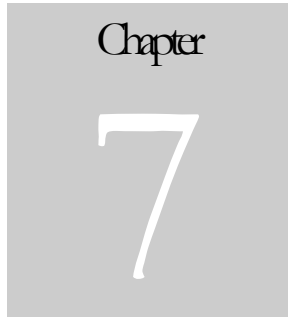
TEC 3700 users get full TRAC reporting information from the R2.53 software. As of this release, the import wizards are able to import R4 timecard file for payroll processing.

Dataysym

Users of Datasym COMM2000 can get periodic sales through POS Store & Forward, if that product is installed and set up to collect the information from the register. The punch times can be used to create time sheets

Heartland

Users who use Heartland Payment Systems Payroll Services can export payroll in a format ready for import in to Heartland.



Tips

TRAC Reports

TipTracking

Reporting Period: Form To

EmployeeNumber	FirstName	LastName	
<input type="text" value="1"/>	Jacob	Sample	
JobTitle	SSNumber	Address	
Chef	000-00-0000	418 East 25th Street	
City	State	ZipCode	
My Town	My State	00000	
Company Name	CompanyAddress	CompanyCity	
Enter Name			
CompanyState	CompanyZipCode	EIN	GrossSales
			\$6,000.00
ChargedSalesWTips	ChargedTips	ChargedTipRate	
\$2,000.00	\$280.00	14.00%	
Sales Subject To Cash Tips	CashTips	CashTipRate	
\$4,000.00	\$520.00	13.00%	
TotalSharedWith	TotalReceivedFrom	NetReportableTips	
\$63.00	\$22.00	\$759.00	

Tips Shared With Others

Employee#	FirstName	LastName	JobTitle	SSNumber	Amount
<input type="text" value="4"/>	Joseph	Sample	Dishwasher	000-00-0000	\$8.00
<input type="text" value="4"/>	Joseph	Sample	Dishwasher	000-00-0000	\$10.00

Record: of 7

Tips Received From Others

Employee#	FirstName	LastName	JobTitle	SSNumber	Amount
-----------	-----------	----------	----------	----------	--------

Employee Signature: _____ Date: _____

Record: of 1 (Filtered)

Illustration 30 TRAC (Tip Reporting Alternative Commitment)

BSI LABOR & SCHEDULING SYSTEM

Users can enter tips and use this TRAC (Tip Reporting Alternative Commitment) form as the statement that will satisfy both the employer's requirement under the TRAC arrangement and the employee's requirement under the law.

You can create TRAC reports for all employees for defined 'Tip Periods' by going to Tips->Create TRAC Reports on the Menu Bar. You can also view a TRAC report or view an employee's tips.

Reports

Labor Costs as a Percentage of Sales

The screenshot shows a window titled "Labor Costs" with the following data:

EmployeeID	Name	Job Title	Hourly Salary	Overtime Salary	Regular Hours	Overtime Hours	Regular Pay	Overtime Pay	Total Pay
1	Jacob	Sample Chef	\$280.00	\$0.00	28	0	\$10.00	\$15.00	\$280.00
2	Wyatt	Sample Cook	\$280.00	\$0.00	28	0	\$10.00	\$15.00	\$280.00
3	Tony	Sample Cook	\$400.00	\$30.00	40	2	\$10.00	\$15.00	\$430.00
4	Roma	Sample Dishwasher	\$175.00	\$0.00	35	0	\$5.00	\$7.50	\$175.00
*			\$0.00	\$0.00	0	0	\$0.00	\$0.00	\$0.00

Total Employees' Pay	\$1,165.00
SSMedTaxRate 12.00%	Total Social Security, Medicare and Tax \$139.80
	Employee Benefits \$200.00
	Total Labor Cost \$1,504.80
Forecasted Sales for Period \$8,850.00	Actual Sales this period \$8,900.00
Payroll PercentageGoal 17.00%	16.91%

Illustration 31 Labor Cost Report

Labor costs are calculated and displayed. Compare the forecasted sales and payroll percentage goal with the actual sales and percentage.

Labor Exception Reporting

The Labor Exception Report provides a report of clock in/out times that do not conform to a schedule.

Labor Costs By Department

The Labor Costs By Department report provides labor costs by department for a cost center or all cost centers and for a schedule or all schedules for the range of dates entered.

Employees Not Clocked In or Out Report

Employers can produce a report of who has not clocked in for the current day at any time.

Other Considerations

Backup

A separate installable program, the maintenance server, comes with BSI Labor & Scheduling. This program follows the directions the user enters in the Backup/Maintenance form and this form can be accessed from Settings on the Menu Bar. Set a time for maintenance and browse to a folder where you would like to store a backup copy of your database. A copy will be saved on the days you designate in the Backup and Maintenance form. It will automatically backup your data on a regular basis and store it in a designated folder.

Recovery

In the event of catastrophic failure that causes the application not to work, it can be uninstalled and then reinstalled at any time, if the Windows file system is not corrupted. If you have entered information that you want, it may or may not be available, depending on the nature of the failure. If you have reinstalled the application and information entered does not show up, you should recover the information by restoring the Schedule_be.mdb file that will be saved in the folder designated in the Backup/Maintenance form. The Schedule_be.mdb file must be copied to the directory that you have installed the application on. You can find this directory by going to "About" from the Menu Bar. The application will display "Target Directory:" which is where your file is located. The default is

C:\Barrington Software Incorporated\BSI Labor and Scheduling System\
Schedule_be.mdb

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