

Settle – Workforce Management

Users Guide

This is a brief guide describing how to use the Settle Workforce Management application. Intended audience is both end users and system administrators.

For Settle V0.4

23 April 2006

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Prerequisite

A working Settle installation is a prerequisite; please refer to the Installation Guide for details on setting up and troubleshooting Settle.

Login

The Settle application requires authentication and authorization before displaying a page to a user. Therefore, each time you begin a Settle session (connect to a URL similar to <http://<yourserver>:<yourport>/settle>), you will be presented with the Settle login screen.

Settle - Workforce Management - Mozilla Firefox

File Edit View Go Bookmarks Tools Help

SwiftRadius Home | Settle Home

Settle - Workforce Management

[Time Entry Guide](#) | [Expense Guide](#) | [Settle Users Guide](#)

Settle - Automated Build Deployment

Please Login

Username:

Password:

Login with user 'admin', password 'admin'

XHTML | CSS

The Settle application is released under the LGPL.

If you have installed the sample data, you can enter user 'admin', password 'admin'. You should be re-directed to the Settle main page.

Main Page

The Settle main page acts as an application dashboard. It is a place where you can easily observe the current state of your time and expense entry, and where you can also choose any of the applications to which you have been granted access from the Sidebar menu.

For instance, to enter time, click on the ‘Time Entry’ link.

The screenshot shows the Settle - Workforce Management application running in a Mozilla Firefox browser. The browser window title is "Settle - Workforce Management - Mozilla Firefox". The address bar shows "SwiftRadius Home | Settle Home". The page has a blue header with the title "Settle - Workforce Management" and navigation links for "Time Entry Guide", "Expense Guide", and "Settle Users Guide". A "Logout" link is in the top right corner. The main content area is divided into a left sidebar and a main panel. The sidebar contains sections for "Applications" (Time Entry, Expenses, Expense Approval, Time Entry Reporting), "Administration" (Employee, User Role, Application User, Environment Variables, Costing Code Admin), and "About This App:" (description of Settle as an open-source system and a link to Sourceforge). The main panel has sections for "Your Messages" (Welcome! Welcome back Super User.), "Time Management" (The following days require time entry. with a list of dates from March 27 to 31, 2006, all showing 0.0 hrs entered.), "Expense Management" (Pending Expense Claims - Not Yet Implemented. A message for each expense claim pending, including amount, date entered, and approver.), and a footer with "XHTML | CSS" and "The Settle application is released under the LGPL."

Time Entry

The Time Entry page is the application where employees record their time.

Time Entry fields

Field	Description	Validation
Work Date	The date for which time is being accounted. The date can be selected by clicking on the calendar icon to launch a calendar application.	<ol style="list-style-type: none"> Valid Date DD/MM/YYYY Within parameters 'Max Days in Future' and 'Max Days in Past' as set in Environment Variables.

Field	Description	Validation
Costing Code	The code against which the time should be recorded. A Costing Code can be a Project or a Leave (Sick/Vacation/etc.)	1. Valid value from list.
Hours	The number of hours	1. Greater than 0, no more than 24 hours.
Comments	A textual comment describing the effort	1. Not blank.

Time Entry Management

- To enter a new entry, fill in all of the fields and click 'save'.
- To modify an existing entry, click 'edit' next to the entry in the table, make the changes in the 'Create Time Entry' section, and then click 'save'.
- To delete an existing entry, click 'delete' next to the entry in the table.

Navigation

- Clicking on the 'previous week' link will display the time for the week previous in the grid.
- Clicking on the 'next week' link will display the time for the next week in the grid.
- Clicking on a date in the calendar displayed under the heading 'Select Week to Display', will load the time for that week into the grid. The month displayed on this calendar can be incremented forward or backward using the double arrows << and >>.

Missing Time

- An employee's missing time is continuously calculated by the application. A day is considered to have missing time if it meets the following criteria.
 1. It is a week day (Monday – Friday).
 2. The hours entered for that day are less than the employees required weekly hours, divided by 5.

3. The date is a number of days in the past, such that it is greater than the value listed in Environment Variable `timeEntry.monitor.minimumDays`, while less than the value listed in Environment Variable `timeEntry.monitor.maximumDays`.
- o For those dates where an employee has missing time, that date will appear in red on the HTML calendar (see below).
 - o Those dates will also appear in the Time Entry summary on the Settle Main Page.

The screenshot displays the 'Settle - Workforce Management' application. The main content area is divided into several sections:

- Create Time Entry:** A form with fields for 'Work Date' (08/04/2006), 'Costing Code' (Vacation), 'Hours' (0.0), and 'Comments'. There are 'save' and 'cancel' buttons.
- Review Time Entries: Apr 02, 2006 - Apr 08, 2006**

Date	Costing Code	Hours	Status	Comments	
03-Apr (Mon)	Vacation	8.0	Pending	Off	edit delete
Daily Total		8.0			
04-Apr (Tue)	Vacation	8.0	Pending	Still off	edit delete
Daily Total		8.0			
05-Apr (Wed)	Vacation	8.0	Pending	And.. off	edit delete
Daily Total		8.0			
Weekly Total		24.0			

Navigation links: [« previous week](#) and [next week »](#)

At the bottom left, there is a 'Select Week to Display' calendar for March 2006. The dates 27, 28, 29, 30, and 31 are highlighted in red.

Footer: XHTML | CSS | The Settle application is released under the LGPL.

Time Entry Reporting

Time Entry Reporting can be used to list the time recorded in the system, by selecting one or more of an Employee, a Company, a Costing Code, and a date range.

The screenshot shows a web browser window titled "Settle - Workforce Management - Mozilla Firefox". The browser's address bar shows "SwiftRadius Home | Settle Home" and a "Logout" link. The main header of the application is "Settle - Workforce Management" with navigation links for "Time Entry Guide", "Expense Guide", and "Settle Users Guide".

The left sidebar contains a menu with two main sections: "Applications" and "Administration". Under "Applications", there are links for "Time Entry", "Expenses", "Expense Approval", and "Time Entry Reporting" (which is currently selected). Under "Administration", there are links for "Employee", "User Role", "Application User", "Environment Variables", and "Costing Code Admin".

The main content area is titled "Time Entry Reporting" and contains a form with the heading "Select criteria for generating Time Entry Report". The form includes the following fields:

- Employee: A dropdown menu with "-- Not Selected --" selected.
- Company: A dropdown menu with "-- Not Selected --" selected.
- Costing Code: A dropdown menu with "-- Not Selected --" selected.
- Date Range: Two date input fields. The "Start Date (dd/mm/yyyy)" field contains "01/04/2006" and the "End Date (dd/mm/yyyy)" field contains "30/04/2006".
- Format: Radio buttons for "PDF" (which is selected) and "HTML".

At the bottom of the form are "Submit" and "Reset" buttons. The footer of the application page includes links for "XHTML" and "CSS", and a note stating "The Settle application is released under the LGPL."

Reports can be viewed in the browser, in either PDF or HTML format. A sample PDF report is shown.

timeEntryReporting.do (application/pdf Object) - Mozilla Firefox

File Edit View Go Bookmarks Tools Help

Save a Copy Search Select 104% Sign

Return to Settle

Time Entry Report

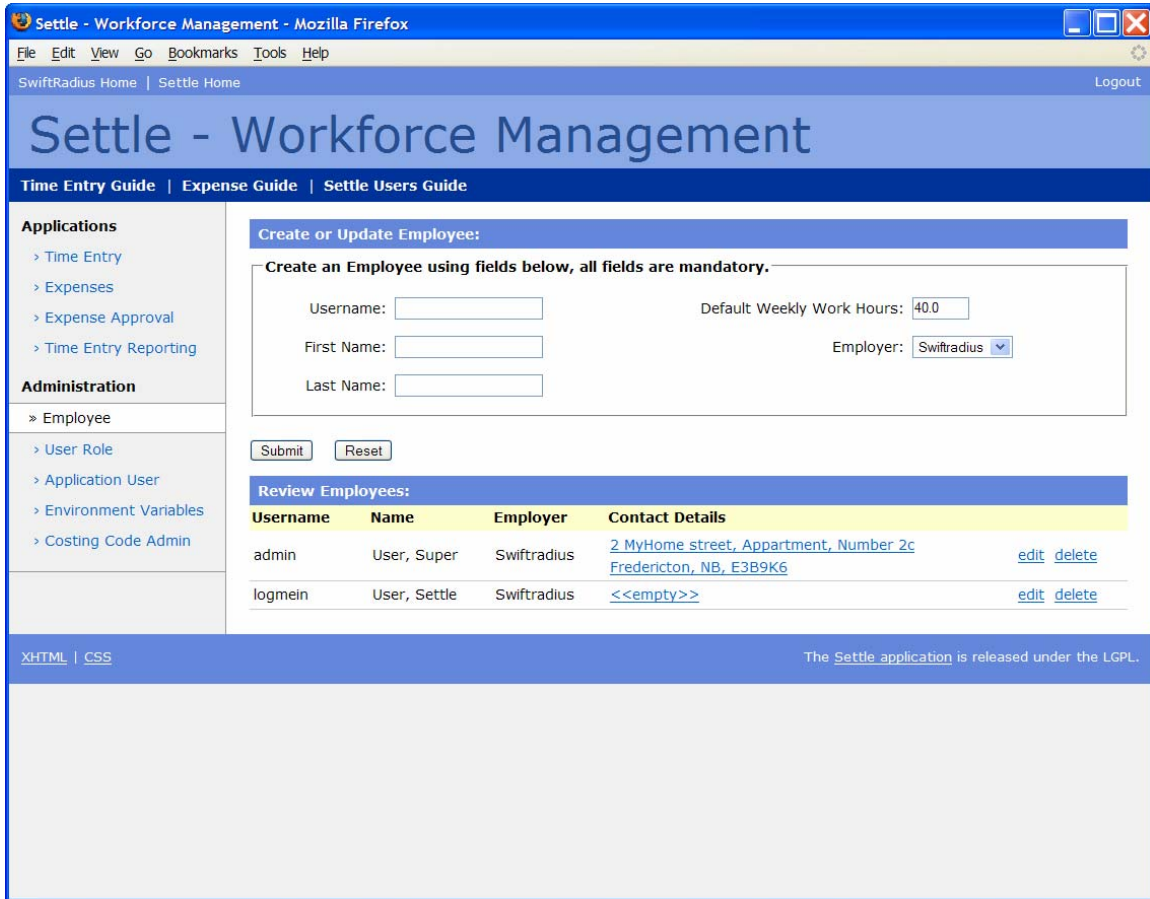
Date Range: Sat Apr 01, 2006 - Sun Apr 30, 2006

Entry Date	Costing	Hours	Comments
Super User			
Mon Apr 3, 2006	Vacation	8.0	Off
Tue Apr 4, 2006	Vacation	8.0	Still off
Wed Apr 5, 2006	Vacation	8.0	And. off
Summary for Super User		24.0	

1 of 1

Employee Administration

To create a new Employee, navigate to the Employee application.



Employee fields

Field	Description	Validation
Username	This will be the employee's system user name.	Not blank, unique.
First Name	Given Name	Not blank.
Last Name	Surname	Not blank
Default Weekly Work Hours	Required hours per week, used in Missing Time calculations	Number >0.
Employer	The Company (of Type Employer) for which this employee will work.	Select from list

Employee Management

- To enter a new entry, fill in all of the fields and click 'submit'.
- To modify an existing entry, click 'edit' next to the entry in the table, make the changes in the 'Create or Update Employee' section, and then click 'save'.
- To delete an existing entry, click 'delete' next to the entry in the table.

User Administration

Once an Employee is created, they will not be able to authenticate to the system yet. It is by creating an Application User that the user is granted access to the system.

The screenshot shows the 'Settle - Workforce Management' application in a Mozilla Firefox browser. The page title is 'Settle - Workforce Management' and it includes navigation links for 'Time Entry Guide', 'Expense Guide', and 'Settle Users Guide'. A sidebar on the left contains a menu with 'Applications' (Time Entry, Expenses, Expense Approval, Time Entry Reporting) and 'Administration' (Employee, User Role, Application User, Environment Variables, Costing Code Admin). The main content area is titled 'Create or Update Application User' and contains a form with the following fields: 'Display Name' (text input), 'Employee' (dropdown menu showing 'User, Super'), 'Password' (text input), 'Enabled' (checkbox), 'Change Password on First Login' (checkbox), 'Minimum Password Age in Days' (text input showing '0'), and 'Maximum Password Age in Days' (text input showing '90'). Below the form are 'Submit' and 'Reset' buttons. A section titled 'Review Application Users:' contains a table with the following data:

Display Name	Employee	Enabled	Password Login Change	Password Age		edit	delete
				Minimum	Maximum		
Swift User	User, Super	true	false	1	90	edit	delete
settleUser	User, Settle	true	false	0	90	edit	delete

At the bottom of the page, there are links for 'XHTML' and 'CSS', and a note stating 'The Settle application is released under the LGPL.'

User fields

Field	Description	Validation
Display name	Display name within application.	Not blank.
Employee	Select a valid employee from a list.	There is a 1:1 relationship between Employee and User.
Password	The user password	1. Length greater than 8 characters.

	for the system.	2. Complexity check – must contain at least one uppercase letter, lowercase letter, number, and special character (valid list {!~@*#\$\$%^&+--})
Enabled	Determine if the user is enabled.	None Note: Users cannot login who are disabled, and this screen is where they are enabled.
Change Password on First Login	Whether or not required to change password on first login	Not implemented.
Minimum Password Age	Minimum interval for which a password must be maintained	Not implemented
Maximum Password Age	Maximum interval after which a password must be changed	Not implemented

User Management

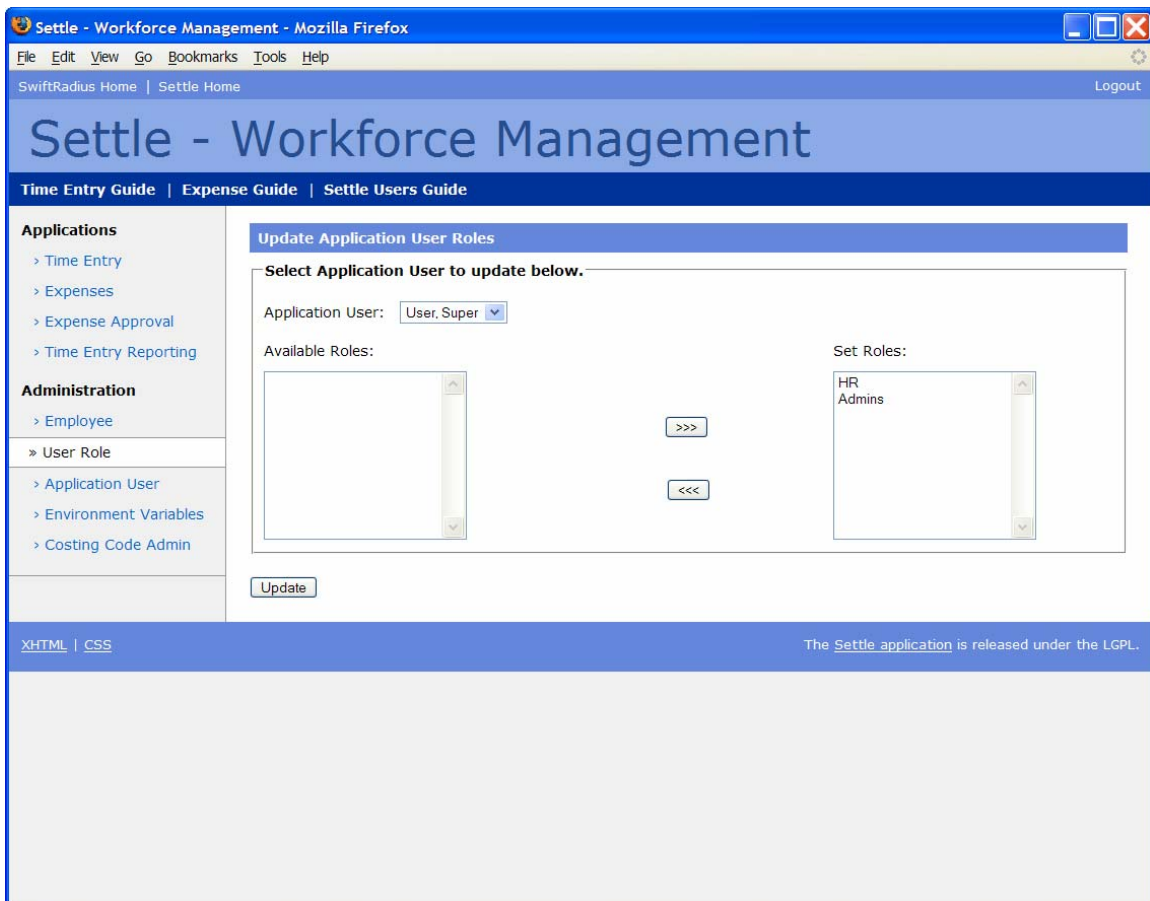
- To enter a new entry, fill in all of the fields and click 'submit'.
- To modify an existing entry, click 'edit' next to the entry in the table, make the changes in the 'Create or Update Application User' section, and then click 'save'.
- To delete an existing entry, click 'delete' next to the entry in the table.

User Roles Administration

Once an Employee is created, and an associated Application User, they are still not authorized to access the system yet. The Application User must be granted one or more roles.

To do this, simply select the user from the 'Application User' field. Then select each of the desired Roles in the 'Available Roles' box, and click the >>> button to add the role to that user. Click update when done.

To remove a role, select that role under the 'Set Roles' box, and click the <<< button to remove that role. Click update when done.



Environment Variables

Environment Variables are used to make configurable parameters within the system easily available to an administrator.

The screenshot shows the 'Settle - Workforce Management' application in a Mozilla Firefox browser. The page title is 'Settle - Workforce Management' and it includes navigation links for 'Time Entry Guide', 'Expense Guide', and 'Settle Users Guide'. A sidebar on the left contains menu items under 'Applications' (Time Entry, Expenses, Expense Approval, Time Entry Reporting) and 'Administration' (Employee, User Role, Application User, Environment Variables, Costing Code Admin). The main content area features a 'Create or Update Environment Variable' form with fields for Name (a dropdown menu), Value, and Comment, along with 'Submit' and 'Reset' buttons. Below the form is a 'Review Environment Variables' table listing various system variables with their values and edit/delete options.

Name	Value	Comment
timeEntry.monitor.minimumDays	8	edit delete
timeEntry.monitor.maximumDays	14	edit delete
timeEntry.max.days.in.future	14	edit delete
timeEntry.max.days.in.past	356	edit delete
timeEntry.report.jrxml	timeEntryDetails.jrxml	edit delete
mail.smtp.host	ssmtp.bloor.is.net.cable.rogers.com	edit delete
mail.smtp.username	unspecified	edit delete
mail.smtp.password	unspecified	edit delete
mail.expense.approval.from	settle_expense@swiftradius.com	edit delete

User fields

Field	Description	Validation
Name	The name of the environment variable. <u>Note:</u> Must coincide with an expected name within the application code. <u>Note:</u> You will not be able to delete an entry that the application is using currently.	Not blank.

Value	Any String	Not Blank
Comments	A friendly description for this variable	None

Variable Management

- To enter a new entry, fill in all of the fields and click 'submit'.
- To modify an existing entry, click 'edit' next to the entry in the table, make the changes in the 'Create or Update Environment Variable' section, and then click 'save'.
- To delete an existing entry, click 'delete' next to the entry in the table.

Costing Code Administration

Costing Codes are a key concept with Settle. A costing code is the category against which time and expenses can be incurred.

A Costing Code is always associated to exactly one Company. If the Company is of type Client, then a Costing Code of type Project can be created. If the Company is of type Employer, then a Costing Code of type Project or Leave can be created.

Time Entries can be created against Costing Codes of either type (Project or Leave). Expense Entries can only be created against Projects.

The screenshot displays the 'Settle - Workforce Management' application in a Mozilla Firefox browser window. The page title is 'Settle - Workforce Management' and it includes navigation links for 'Time Entry Guide', 'Expense Guide', and 'Settle Users Guide'. A left sidebar contains 'Applications' (Time Entry, Expenses, Expense Approval, Time Entry Reporting) and 'Administration' (Employee, User Role, Application User, Environment Variables, Costing Code Admin). The main content area is titled 'Create or Update Costing Codes:' and features a form to 'Select a type of Costing Code to create:' with radio buttons for 'Project' (selected) and 'Leave'. Below this is a section to 'Create a Costing Code using fields below, all fields are mandatory.' with input fields for 'Name', 'Short Name', and 'Company' (set to 'WidgetCo'), along with 'Submit' and 'Reset' buttons. A 'Review Costing Codes:' section contains a table with columns for Name, Short Name, Type, and Company, listing existing codes like Vacation, Sick, Settle, and Corporate.

Name	Short Name	Type	Company	
Vacation	Vacation	Leave	Swiftradius	edit delete
Sick	Sick	Leave	Swiftradius	edit delete
Settle	Settle	Project	Swiftradius	edit delete
Corporate	Corp.	Project	Swiftradius	edit delete

Costing Code fields

Field	Description	Validation
Type	Determines whether this is a Project or a Leave.	Only Employers can have Leave codes.
Name	Any String	Unique
Short Name	Any String	Unique
Company	The Company related to the Costing Code.	Only Employers can have Leave codes.

Costing Code Management

- To enter a new entry, fill in all of the fields and click 'submit'.
- To modify an existing entry, click 'edit' next to the entry in the table, make the changes in the 'Create or Update Costing Codes' section, and then click 'save'.
- To delete an existing entry, click 'delete' next to the entry in the table.