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## FOCUS DAILY RULES – STEP-BY-STEP SET-UP INSTRUCTIONS

1.



Go to an existing daily rule and click on the 'new' or 'duplicate' button to create a new daily rule.

N.B.

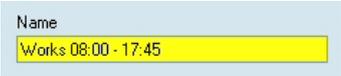
If you feel that different groups of employees require different settings for the same shift then consider setting up one rule for each group of employees. There is no limit to the number of daily rules you can create although the Work Schedule does limit you to a maximum of 5 alternative shifts for each day – that is 5 alternative shifts that any one employee might be eligible for. Each employee is either assigned to a Work Schedule or a Rota.

Daily Rules do not define which days the shift will be worked on – this is defined by the Work Schedule or Rota – although you can indicate the applicable days in the name of the rule if you wish for reference.

Consult the Help facility for more information.

## GENERAL TAB

2. 

Define a 5 digit short code that will be used in the Shift column on the timesheet to represent this shift. The short code must be unique.
3. 

Give the daily rule a name – it is useful to include the shift times in the name. If you plan to use the Rota keep the name short as this makes it easier to see when you are planning the rota.
4. 

Set the start and end times of the shift.

These should be the core hours of the shift. Anybody who clocks in later than the start time will be treated as late and anybody who clocks out earlier than the end time will be treated as having left early.

If you wish to define an open flexible shift where employees can start at a variety of different times set the start time to 00:00 and the end time to 24:00
5. 

Set the Standard Hours to the average number of hours you would expect somebody to work on this shift (excluding unpaid breaks). For fixed shifts this should be the length of the shift. This value is used in the Rota and the Cost Variance report to calculate the planned hours.
6. 

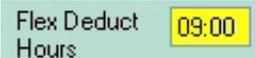
Set the Normal Rate to the rate that is applicable to this shift – this might be rate 1 if you plan to accrue time at a basic rate but if you are creating a night or weekend shift this might be a different overtime rate.

If more than one rate could be applied to your shift, depending upon the time of day or the amount of time worked, set this rate to the rate applicable at the normal start of the shift.

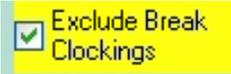
7. 

If your shift spans midnight you will need to decide whether you wish the time worked to be accrued on the day in which the shift starts or on the day in which the shift ends. Set as required.

If your shift does not span midnight set to '1<sup>st</sup> Day Receives Hours'.

8. 

If you plan to use a Flexitime Rule then set the Flex Deduct Hours to the number of hours the employee would contractually be expected to work if they worked the standard shift.

9. 

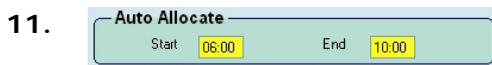
If you plan to use Focus to produce an accurate fire evacuation report based upon who is clocked in then you will want your employees to clock each time they enter and exit the building. If this is the case you may wish to accrue hours based upon the first and last clocking of the day only and ignore any other clocking transactions in the calculation. Tick the 'Exclude Break Clockings' tickbox if this is the case.

If your employees do not come and go out of the building other than for planned breaks such as lunch it is not necessary to tick this box.

When the 'Exclude Break Clockings' tickbox is ticked Focus can deduct a fixed amount of time for an unpaid break using the 'Break After' feature but it cannot keep track of an employees timekeeping on planned breaks.



If you have defined one or more Cost Centres in the System Set-up then you will have the option to select a cost centre this daily rule applies to. The Cost Variance report can then be used to filter actual time worked by Cost Centre.



The auto-allocate band must be set correctly to ensure that Focus assigns the best shift pattern when using the Work Schedule.

The auto-allocate start and end times should span the start time of the shift and should cover the period of time during which you would expect your employees to clock onto this shift. You should take into account when employees arrive on-site early, for example when they have been asked to do some pre-shift overtime or because they caught an early bus. Likewise, the end time should be the very latest time an employee might start on this shift, taking into account late starts due to dentist appointments etc.

You should also think about other shifts that could be planned into the Work Schedule on the same day. Will the auto-allocate band overlap on any of these shifts? If it does and an employee clocks in during this overlapping period then Focus will choose the shift where the start time is closest to the time the employee clocked in. If two shifts start at the same time Focus will also take into account the last clocking of the day when choosing the most appropriate shift, comparing the last clocking to the shift end time. You may wish to amend the auto-allocate bands so that they do not overlap so you can choose exactly when the change between shifts takes place.

If there is only one possible shift defined in Work Schedule then the auto allocate band should be set to 00:00 to 24:00

12.

A screenshot of a software interface showing a section titled 'Auto Clock Out'. Below the title is a checkbox with the text 'Auto Clock Out' next to it. The checkbox is checked, and the text is highlighted in yellow.

If this shift will be used by employees, such as drivers, who will not be on site at the end of their shift then you may like Focus to automatically assign a clock out time.

When the 'Auto Clock Out' tick box is ticked then if an employee doesn't clock out at the end of the shift Focus will assume the shift end time as the time when the employee finished.

### OVERTIME-1 TAB

13.

Rate Bands			
From	To	Rate	Min
00:00	00:00	0	00:00
08:00	17:45	1	00:00
00:00	00:00	0	00:00
00:00	00:00	0	00:00
00:00	00:00	0	00:00
00:00	00:00	0	00:00
00:00	00:00	0	00:00
00:00	00:00	0	00:00
00:00	00:00	0	00:00

The Overtime-1 tab determines when you wish to accrue time and at which rate. This tab must be set-up even if you do not wish to accrue overtime.

Focus will not accrue hours during any period that falls outside of the rate bands defined.

If you clicked the 'new' button when creating the daily rule then Focus will automatically set-up the second row on the Overtime-1 tab with the start and end times of your shift. You can amend this if you wish.

If you wish to define an open shift, or determine overtime based upon the number of hours worked then set the second row from 00:00 to 24:00 or the earliest and latest times you wish hours to be accrued.

Alternatively, use the second row to set the core hours of the shift during which you wish time to be accrued at the Normal Rate.

Rate Bands			
From	To	Rate	Min
06:00	08:00	2	00:45
08:00	17:45	1	00:00
00:00	00:00	0	00:00
00:00	00:00	0	00:00
00:00	00:00	0	00:00
00:00	00:00	0	00:00
00:00	00:00	0	00:00
00:00	00:00	0	00:00
00:00	00:00	0	00:00

If you wish to accrue time prior to the start of the shift set the first row to the period of time during which you would be happy to accrue hours. This could be accrued at an overtime rate or at the same rate for the main shift.

You can set up a conditional minimum amount of time an employee has to work before they become eligible for the accrual of overtime by setting a minimum value. With the setting of 00:45 shown this means that an employee must work a minimum of 45 minutes during the hours of 6am and 8am before they will accrue any time at rate 2.

Note that timebands cannot overlap.

From	To	Rate	Min
00:00	00:00	0	00:00
08:00	17:45	1	00:00
17:45	20:00	1	01:00
20:00	02:00	3	00:00
00:00	00:00	0	00:00
00:00	00:00	0	00:00
00:00	00:00	0	00:00
00:00	00:00	0	00:00

If you wish to accrue time after the end of a shift then use rows three onwards to define which rates should be applied at during which time period.

The settings on the Overtime-1 tab are used in conjunction with the settings on Overtime-2. The settings on Overtime-1 are always applied first.

## OVERTIME-2 TAB

14.



Rate	after	flows to Rate
Rate 1	08:00	1
Rate 2	08:00	2
Rate 3	08:00	3
Rate 4	08:00	4
Rate 5	08:00	5
Rate 6	08:00	6

The Overtime-2 tab is used when you wish to accrue overtime based upon the amount of time an employee has worked rather than on the time of day.

If you do not wish to accrue overtime on this basis leave the settings as shown.



Rate	after	flows to Rate
Rate 1	08:00	3
Rate 2	06:00	2
Rate 3	02:00	2
Rate 4	00:00	0
Rate 5	00:00	0
Rate 6	00:00	0

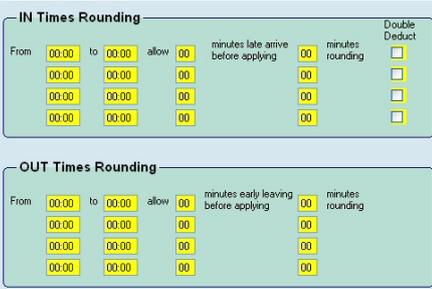
If you wish to accrue overtime based upon the amount of time an employee has worked start with the Normal Rate you set earlier (this should also be the rate used in Overtime-1 during the start period of the shift). Set the number of hours to the maximum number of hours an employee would work at this rate before becoming eligible for a new rate. Then set the rate that the time will flow into after the number of hours has been accrued. Continue in this way.

If you choose to repeat a rate band in the flow then all remaining time will be accrued that that rate.

When you wish to stop time being accrued then set the 'flows to Rate' to zero.

The example shown starts at rate 1. After 8 hours have been accrued time flows to rate 3. After 2 hours have been accrued at rate 3 then time flows to rate 2. All remaining time is accrued at rate 2 as the rate flows back into itself.

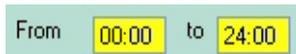
## ROUNDING TAB

15. 

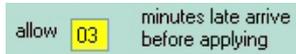
The rounding tab defines grace periods and the increments by which time is accrued.

If you wish to accrue time minute-by-minute then you do not need to complete this tab.

If you wish to increment time, for example only accrue time in 15 minute portions, then you have the option of setting a grace period.



Define the period during which you wish the rounding rules to be applied. Normally this is set to all day (from 00:00 to 24:00) but if you wish your employees to clock for their breaks then you may wish to define different rules for those break periods.

16. 

Define the grace period (the 'allow') setting. This is the number of minutes during which you are happy to round an employee's clocking time back for clocking in times and round forward for clocking out times.

17. 

Set the 'minutes rounding' to the increment you wish to apply, for example 15 minutes.

Focus will apply the grace and rounding rules as follows:

- Increments are applied from the hour, so 15 minute rounding will cause times to be rounded to the hour, quarter past, half past and quarter to the hour. 10 minute rounding will cause times to be rounded to the hour, 10 past, 20 past etc.

- **For IN clockings within grace:**  
when an employee clocks within the grace period since the last increment then their time will be rounded back to the last increment. If 3 minutes grace was allowed with 15 minute rounding and an employee clocked at 15:18 then the time would be rounded back to 15:15.
- **For IN clockings outside grace:**  
when an employee clocks outside the grace period since the last increment then their time will be rounded forward to the next increment. If 3 minutes grace was allowed with 15 minute rounding and an employee clocked at 15:19 then the time would be rounded forward to 15:30.
- **For OUT clockings within grace:**  
when an employee clocks within the grace period before the next increment then their time will be rounded forward to the next increment. If 1 minute grace was allowed with 15 minute rounding and an employee clocked at 15:29 then the time would be rounded forward to 15:30.

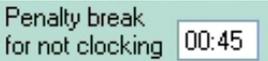
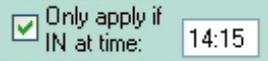
**For OUT clockings outside grace:** when an employee clocks outside the grace period before the next increment then their time will be rounded back to the previous increment. If 1 minute grace was allowed with 15 minute rounded and an employee clocked at 15:28 then the time would be rounded back to 15:15.

18.



Ticking the 'Double Deduct' tickbox will cause the number of minutes an employee is late to be deducted as well as the rounding rule being applied.

## BREAK BAND TAB

19.  Use break bands if the breaks on this shift occur during specific periods of time. If breaks can be taken at any time or after a certain amount of time has been worked consider using the break after tab instead.
- If a break is paid and the employees will not be clocking for their breaks there is no need to define the break in Focus.
- Define the period during which an employee is permitted a break on this shift (from and to) and specify the amount of break allowed.
- All breaks taken outside the break bands will be deducted from the time accrued.
20.  Specify the rate you'd like the break deducted from. This would normally be the pay rate applicable at the time of the break.
21.  If you wish to deduct time from an employee if they do not clock for their break specify the amount to deduct.
22.  You can make the break conditional based upon whether the employee is in at a specific time. This is useful if employees could be eligible for a break only if they work a long shift, for example.
23.  Determine whether the break is paid or unpaid. No time will be deducted for paid breaks unless you specify a penalty break for not clocking.

24.

Grace	01
Round	05

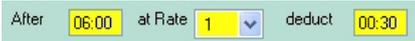
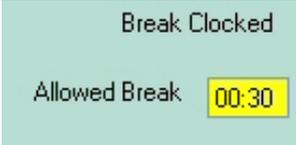
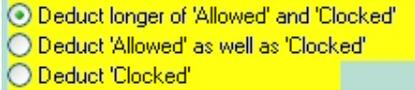
Setting grace and rounding rules for the break allows a little flexibility to be shown to employees who take an extra few extra minutes for their break than allowed.

Setting a grace period of 1 minute for a 10 minute break means that employees can take a break of 11 minutes but will still only be deducted 10 minutes. If 5 minutes rounding was applied then a break of 12 minutes would result in 15 minute being deducted.

The clocking times used for calculating breaks are the times rounded according to the rules defined in the Rounding tab. Therefore, if you have specified 15 minute rounding all break clockings will be rounded to the quarter of an hour. This might mean that employees get a lot more time deducted for their break than you intended.

Consider setting the rules on the Rounding tab to 1 minute rounding for the break period and using the break grace and rounding rules instead.

## BREAK AFTER TAB

25.  Use the break after tab if your break times are flexible.
- Define after how many hours an employee is eligible for a break and an amount to deduct if the employee does not clock for a break.
26.  Define how much break is allowed if the employee clocks for the break.
27.  Decide what to deduct if the employee clocks for a break.
- Deduct Longer of 'Allowed' and 'Clocked':**  
This deducts any break that the employee clocks. If this is not as long as the Break Allowed then the total 'Break Allowed' is deducted. Note that when the Break Allowed is deducted it is done so progressively as in the case of the Penalty Break.
- Deduct 'Allowed' as well as 'Clocked':** In this case, the employee is not expected to clock for a break, so the Break Allowed will be added to any break that the employee clocks.
- Deduct 'Clocked':** This has the effect of not applying a Break and pays the employee the hours worked. Note that the penalty Break still applies if the employee does not take a break.

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## BONUS TAB

28.



Hours Worked	Bonus Hours	At Rate
09:00	01:00	2

Use the Bonus tab to define attendance and shift bonuses paid in hours. For alternative bonus requirements contact Egress Systems.

Define how many hours an employee has to work before being eligible for a bonus. Only time accrued at rate 1 is counted for the bonus calculation.

Define the length of that bonus and the rate at which the bonus will be paid.

## EXCEPTIONS TAB

29.

	Condition	Time	Rate
<input checked="" type="checkbox"/> Target Hours 1	Less Than	09:00	1

The exceptions tab allows you to create exceptions for events that will be highlighted in the exceptions facility.

Two type of exception can be defined:

- **Target Hours** – this highlights when an employee has not accrued the amount of time they were expected to accrue at a specific rate.
- **Unauthorised Overtime** – this highlights when more time has been worked at a specific rate than is authorised.

To specify a Target Hours exception tick the tickbox next to one row and select the 'less than' condition.

Specify the minimum amount of time an employee is expected to accrue and the rate.

30.

<input checked="" type="checkbox"/> Target Hours 2	More Than	00:00	2
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To specify an Unauthorised Overtime exception tick the tickbox next to one row and select the 'more than' condition.

Specify the amount of time over which an employee is not permitted to accrue time without authorisation.

Don't forget to save your daily rule.

The Script tab will be displayed if you have 'Advanced Daily Rules' ticked in System Set-up. This tab allows customised rules to be defined that are specific to your organisation. Please contact Egress Systems for more information.