TORUS FOR WINDOWS

VERSION 9

QUICK REFERENCE GUIDE

Torus Version 9 – Quick Reference Guide

Introduction

Torus is made up of two separate programs: **T9Main** and **T9Admin**. The programs can not be run together at the same time.

T9Main is the main program you will use for day-to-day activities. T9Admin is used to perform special tasks or to adjust the Torus configuration. This quick guide only refers to using T9Main.

Logging in to Torus

Upon starting T9Main, you will be prompted for a *Name* and *Password*. The Name will already be set to the last Name that was successfully used. Upon supplying a valid Name and Password, T9Main opens, showing the *Employee List*. All of the employees are listed here.

If Torus displays a message stating *Timelinks not Verified* then a problem has occurred with the connection between the Torus software and the Timelink Clock/s. Torus technical support can provide assistance in this situation.

Employee List

Employees can be sorted in *Name* or *ID* order using the option buttons.

You can search for a particular employee by entering the first few characters of the their name (or, when in *Sort by ID* mode, enter their Employee Number).

Timesheet

To view an employee's *Timesheet*, highlight the required employee in the employee list and click on *Timesheet*.

- The arrow buttons on the top right of the Timesheet window move the Timesheet forwards and backwards one week at a time.

- Clicking on the blue circle, takes you to the current week.

- The arrows on the left move to the next/previous employee in the Employee List.

Adding an Employee

To add a new employee, Click on *New*, then enter the following:
- *Employee Number* (this is usually the employee's Payroll Number)
- *Name* (usually in the format: last name, first name)
- *Department*
- *Group* (usually 1 unless instructed otherwise)
- *Badge Number* (the number printed on the bottom right corner of their clock card).

Click on *add* to save the details in both Torus and the Timelink (clocking machine).

If Torus reports a problem, then click *No* when prompted to add the employee just to Torus. Ensure that the employee number and badge number are not being used by someone else.

Deleting an Employee

To delete an employee, highlight the required employee in the employee list and press *Delete* on the PC Keyboard. You will be asked to confirm the deletion and then asked whether to:

- *only delete from the Timelink and retain historic data in Torus*
- **or,** to *delete from both Torus and the Timelink*.

It is best practice to retain the historical data. This way, previous timesheet/clocking times can be reviewed if ever necessary.

It is advisable to subsequently change the deleted employee to be in the *Leavers* department. To do this, highlight the required employee, click on *Personal Info.* and then change the department to be *Leavers* and click *Save.* This way, all leavers will be kept together when it comes to producing reports.

The *Personal Info.* window also allows you to enter optional information such as contact details etc.

Changing an Employees Card / Badge

To change an employee's card / badge:
- highlight the employee in the employee list
- select *Edit* from the Menu bar and then click on *Change Card*.
- enter the new card/badge number and click *okay*.

Setting up an Employee's Yearly Schedule

Each employee has their own *Yearly Schedule*. This is a rosta for the current year, showing the shifts that will be worked on individual days. This is especially suited to situations where repeating shift patterns are used. In situations where shifts can not be predicted in advance, the actual shifts that were worked can be retrospectively set and the clocking times re-calculated.

In Torus, the individual shifts are referred to as *Daily Rules*. As this is a quick guide, we suggest you refer to the full manual for details of how to add / edit daily rules, but to view existing daily rules, click on *File* from the Menu Bar, *Open* and then select *Daily Rules* and click on *OK*. Use the arrow buttons at the top of the window to move between the rules.

To view and edit an individual employee's Yearly Schedule, highlight the required employee in the employee list and click on *schedule*.

Each day of the year is represented with a character. These characters are the 'short codes' representing the Daily Rules that have been previously set up. The **?** character indicates that no Daily Rule has been selected and therefore a default rule will be used (this is actually rule A).

It is worth noting how the weekdays, Monday to Friday are shown in **Black** and weekend days, Saturday and Sunday are shown in **Red**.

To select a Daily Rule for a particular day, right-click on that day in the schedule and click on *Select Daily Rule*.
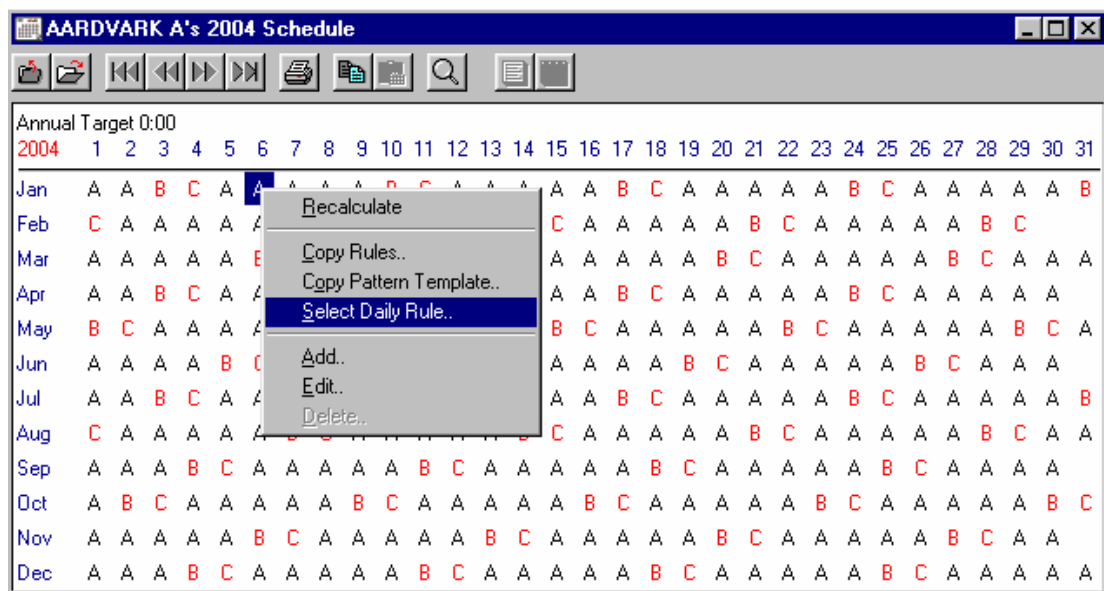

fig 1

Torus then displays a list of all predefined Daily Rules. Select the required Daily Rule from the list and click on *OK*.

This procedure can be repeated on a day-by-day basis, or you could repeat an individual day or a pattern of days for the remainder of the year.

To do this, right click on the first day of the pattern (or individual day) to repeat, then select *Copy Rules*.

- If you just wish to copy one Daily Rule for the rest of the year, simply click *OK* (the OK at the top).
- **Or**, if you wish to copy say a block of seven Daily Rules and repeat that block for the remainder of the year, enter the value 7 and click *OK* (the OK at the top).
-

The schedule should now be updated.
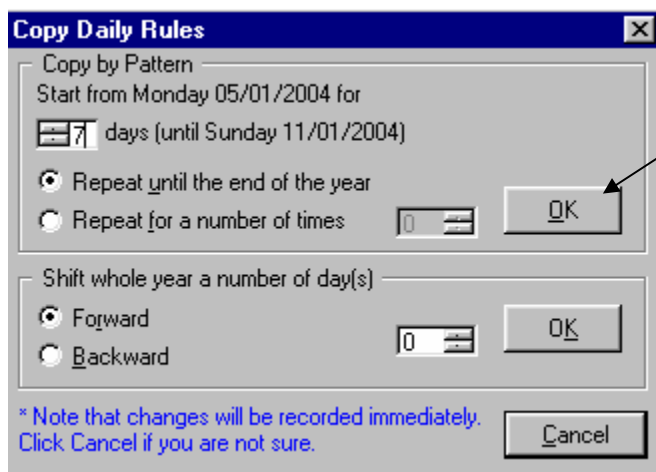
Use this OK button

fig 2

The above example in Figure 1 shows a repeating pattern of Daily Rule **A** Monday to Friday, then Daily Rules **B** and **C** on Saturday and Sunday.

This was achieved by selecting the individual Daily Rules for the 1st of Jan through to the 11th of Jan. Then the pattern between the 5th and 11th was repeated for the remainder of the year i.e. right-click on the 5th of Jan, select *Copy Rules*, enter a value of *7* and click *OK*.

Yearly Pattern Templates

If a number of employees are to have the same *Yearly Schedule* applied to them, then your set up time can be saved by using *Templates*.

Once a Template is created, it is then applied to the relevant individual employees. This is potentially quicker than creating the same Yearly Schedule for each employee.

To create or edit a Template, click on File from the Menu Bar and then Open. Select *Yearly Pattern Templates* and click *OK*. The default Template will open.

If you are creating a new Template then click on *Edit* from the Menu Bar and then *New Record*.

You will be prompted to enter a description for the Template e.g. Night Shift or Packing etc. A new Template is then created showing it descriptive name.

In exactly the same way as we created an individual employee's Yearly Schedule, we can select Daily Rules, copy individual days / blocks and repeat them etc.

To apply a template to an employee, highlight the required employee from the employee list and click on *Schedule*. Right-click anywhere on their yearly schedule and select *Copy Pattern Template*. From here, you can select the template to apply to the employee.

Booking an Absence

Prior to using Torus to maintain employee holidays, the holiday entitlement for each employee must be set. To do this, highlight the required employee in the employee list and click on *T+A info*. The holiday entitlement can be entered and then saved.

To book an absence for an employee, highlight the employee in the employee list and select *Yearly Abs*. The following window shows all absences booked / taken throughout the current year. To book a new absence, double click on the day (or the first day) of the absence.
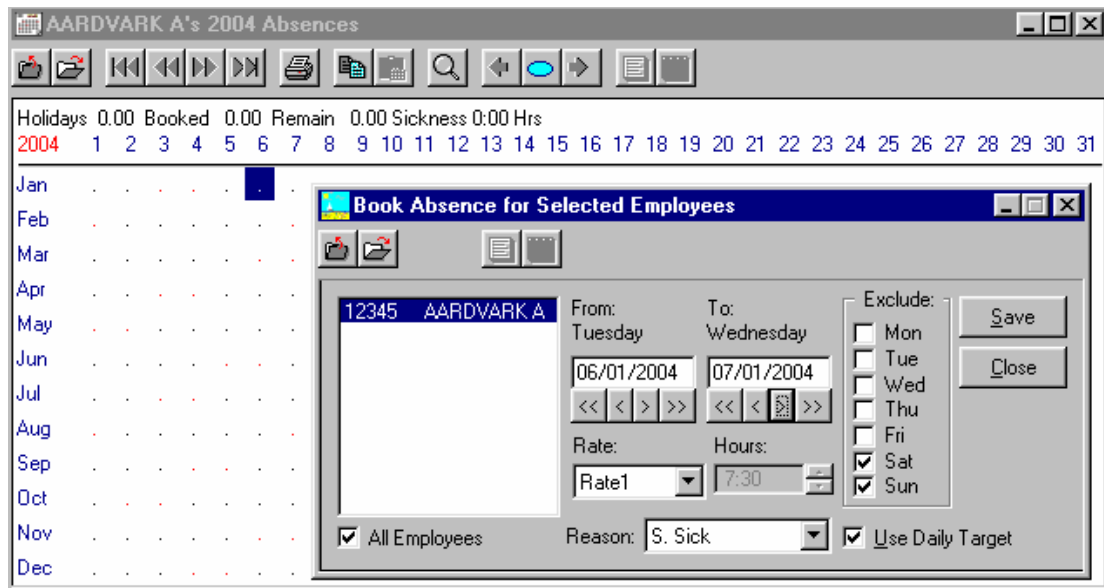
fig 4

A date range can be entered. Notice how non-contractual days can be excluded, e.g. by excluding Saturday and Sunday, these days will not be deducted from the employee's current remaining holiday days. Select a reason for the absence. Note that different Absence Reasons give different Rates and Hours to set against the absence (the hours are per absence day). These default values set against the various Absence Reason codes can be viewed / edited, please refer to the full manual for this.

The Use Daily Target check box sets the absence hours to be the same as the target hours set in the relevant Daily Rule. Un-ticking this box allows the Hours to be manually changed.

Clicking on Save will add the relevant Absence Reason Code to the Yearly Absence window.