

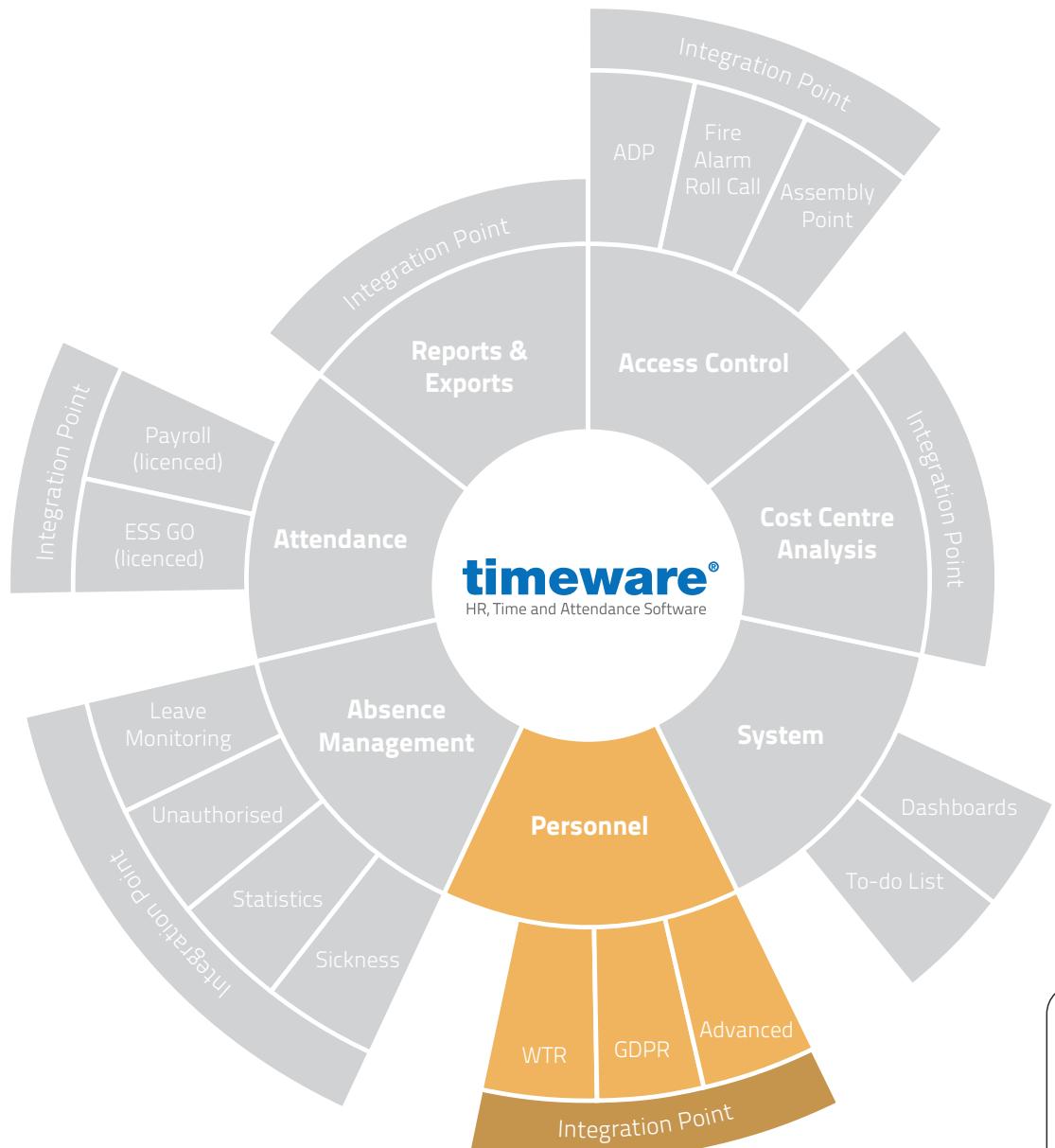


# timeware®

HR, Time and Attendance Software

ON PREMISE  
SOFTWARE

## Training guide: Basic Personnel



Company Name: timeware (UK) Ltd.

Registered Office: 3 Fieldhouse Road, Rochdale,  
Greater Manchester, OL12 0AD.

Company Reg. No: 05886806.

Registered in: England.

t2-0750: Copyright NMD<sup>3</sup> Ltd

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## Contents

Course	Duration
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### **An introduction to timeware® personnel**

Approximately 30 minutes

Adding a personnel record, amending a personnel record and setting an employee as a leaver in timeware® personnel.

### **Description**

#### **Understanding timeware® personnel**

#### **Adding a new employee**

#### **Making amendments to an existing employee**

#### **Setting an employee to a leaver**

All information pertaining to any personnel record within this document is obtained from a demonstration database and are not details of any individual.

## Understanding timeware® personnel

At the heart of the timeware® system is the personnel database. Before we can look at absence management, attendance, access control or job costing, we need to ensure that the details for each person are accurate.

Everyone on the timeware® system must have a personnel record, whether they are temporary workers or the Managing Director. Without this record the rest of the system cannot function.

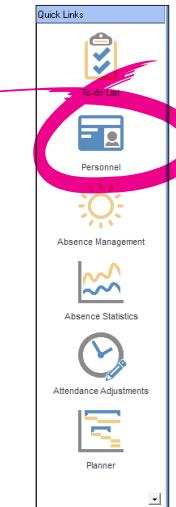


 **YouTube**

Link to understanding timeware® personnel

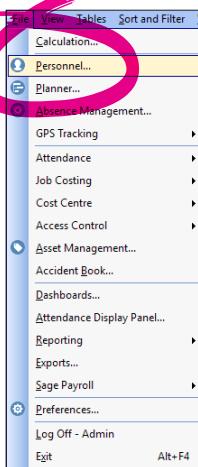
## Adding a new employee

1. To access the timeware® personnel, select the Personnel Quick Link,



Link to adding a new employee

or, select <File>, then <Personnel>...



- The personnel screen will appear at the record last viewed by the user.

Press <Add> to add a new personnel record. All the fields will then turn blue, ready for the new details.

Personnel

Employee ID: 1 First name: Dave Last name: Webb

**Essential (General)**

Badge format: 26 bit - NMD3 Facility code: 0 Badge: 

To select a photo use right mouse click on the box.

Payroll: 1 Integration ID: GPS IMEI: Known as: Webb, Dave Email address: dave.webb@timeware.co.uk Security pin: Biometric data: Finger (Suprema) Remove Face (Suprema) Remove Finger Registration Wizard (Suprema) Remove Finger (SecuGen) Remove Other Remove Finger Registration Wizard (SecuGen) Remove

Date started with company: 31/10/2009 10 years, 11 month(s), 25 day(s) Remove 'Years Service' from To-Do List Badge activation: to Employment status: Employee Current employment: Supervisor Absence entitlement policy: 20 Days Holiday Period schedule: 06:00-14:0014:00-22:0022:00-06:00 Week rotation: 1 Terminal policy: All Terminals Email policy: Not Required Remuneration policy: Not Required Cost centre (default): Flexitime closing balance set on: / / Amount: / /

Add Edit Delete Find... Refresh Preview... Copy... Close

Record 1 of 91

Personnel

Employee ID: 2 First name: Michael Last name: Coope

**Essential (General)**

Badge format: 26 bit - NMD3 Facility code: 0 Badge: 

To select a photo use right mouse click on the box.

Payroll: 2 Integration ID: GPS IMEI: Known as: Coope, Michael Email address: webbdi@blueyonder.co.uk Security pin: Biometric data: Finger (Suprema) Remove Face (Suprema) Remove Finger Registration Wizard (Suprema) Remove Finger (SecuGen) Remove Other Remove Finger Registration Wizard (SecuGen) Remove

Date started with company: 24/01/2007 13 years, 9 month(s), 2 day(s) Remove 'Years Service' from To-Do List Badge activation: to Employment status: Employee Current employment: Design Engineer Absence entitlement policy: 20 Days Holiday Period schedule: 06:00-14:0014:00-22:0022:00-06:00 Week rotation: 2 Terminal policy: All Terminals Email policy: Not Required Remuneration policy: Not Required Cost centre (default): Flexitime closing balance set on: / / Amount: / /

Add Edit Delete Find... Refresh Preview... Copy... Close

Record 2 of 91

**3. Complete the following fields in the General screen:**

**a. First and last name**

**b. Badge number**

This is the number on the back of your card/FOB to allow the employee to clock in and out.

**c. Date started with company**

This can be assigned pro-actively and retro-actively i.e. set before or after the employee starts!

**d. Employment status**

This is to define a person's position in the company, whether they are Agency, Employee, Staff or a Leaver. The system can use these to filter if required i.e. in the reports module to filter out leavers etc.

**e. Absence Entitlement Policy**

This defines the person's holiday allowance i.e. 28 days per year. The system gives a running total of absence entitlement based on absences (holidays) booked throughout the year. See Absence Management training guide for more info !

**f. Period Schedule**

This is how a persons working pattern is defined whether they are rotational shift workers, night workers, flexitime workers etc. All of it is configured within the period schedule. For more information, please see the Advanced Attendance training guide !

**g. Terminal Policy/Access Groups**

The Terminal Policy/Access Groups outlines which pieces of timeware hardware can be used (or not used !) e.g. You want employee A to access the Reception Door, but you don't want employee B to. They would both require separate policies to define the access permissions etc ! For more information, please see the Advanced Personnel training guide !

4. Allocate the person to the correct, pre-defined, groupings in the Grouping screen. Remember, if you allocate the person to a group that you are not entitled to view, the person will disappear from your screen.

Employee ID: First name: Michael Last name: Cooper

**Essential (Groupings)**  
The fields below are used for grouping employees together. This is mainly for reporting purposes and enquiries.

Company: Fabrication  
Department: Engineering  
Section: Engineer  
Pay Type:  
Line Manager:  
Grouping 06:  
Grouping 07:  
Grouping 08:  
Grouping 09:  
Grouping 10:

Update Cancel

Adding new record

Next, click on the Employment heading in the Essentials section.

Employee ID: First name: Michael Last name: Cooper

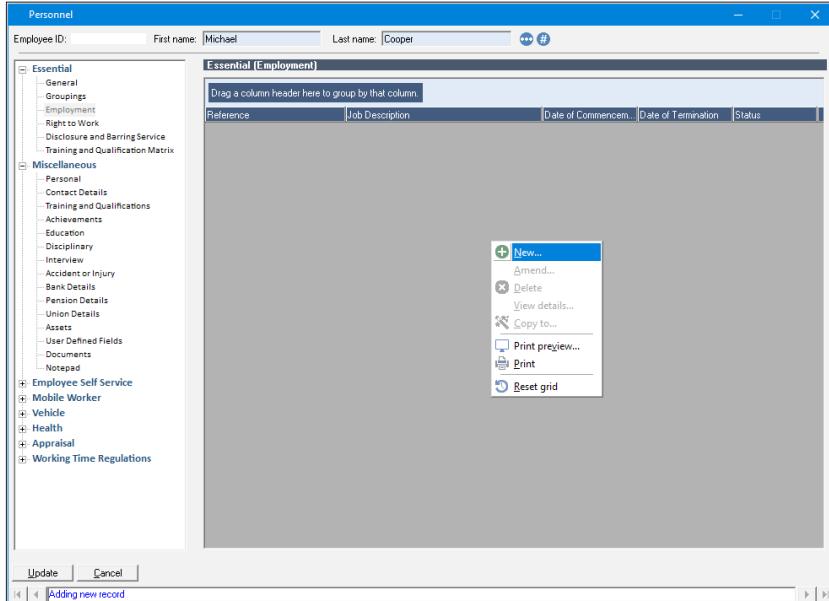
**Essential (Employment)**  
Drag a column header here to group by that column.

Reference	Job Description	Date of Commencement	Date of Termination	Status
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Update Cancel

Adding new record

5. Right click and press <New>



Complete the following fields;

### Reference

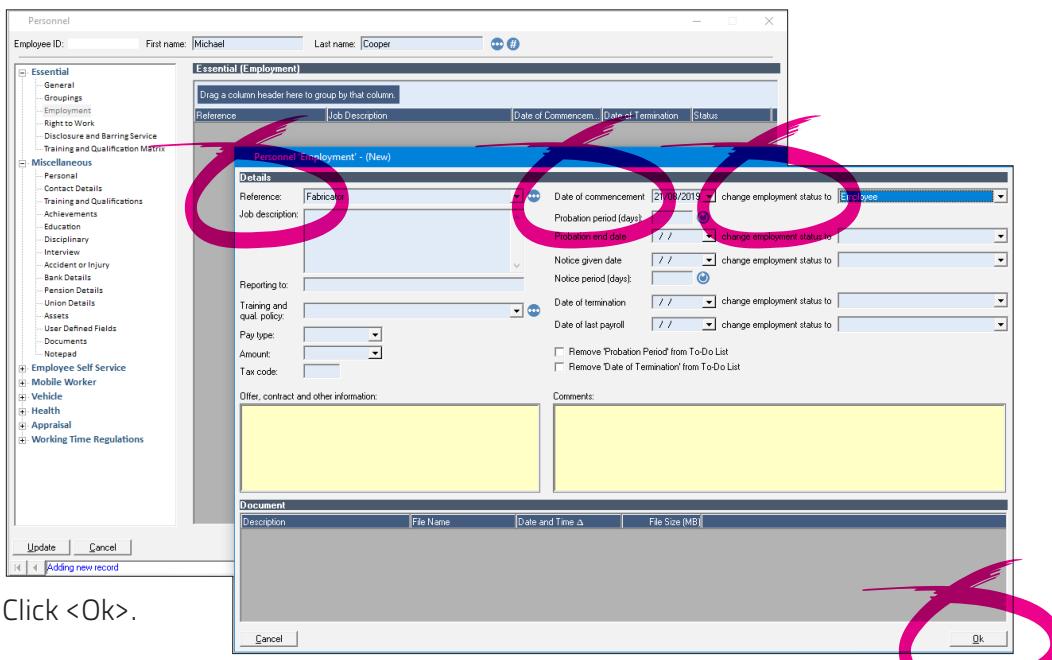
The person's job role i.e. Fabrication Manager or Accountant.

### Date of Commencement

The date the person started in the selected job role.

### Employment status

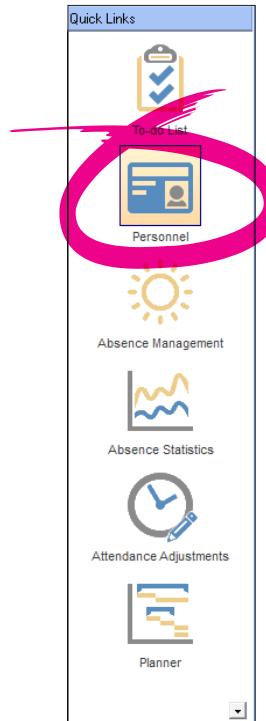
The person's status within the company i.e. Agency, Staff or Employee etc.



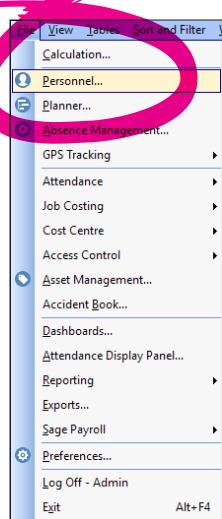
Click <Ok>.

## Making amendments to an existing employee

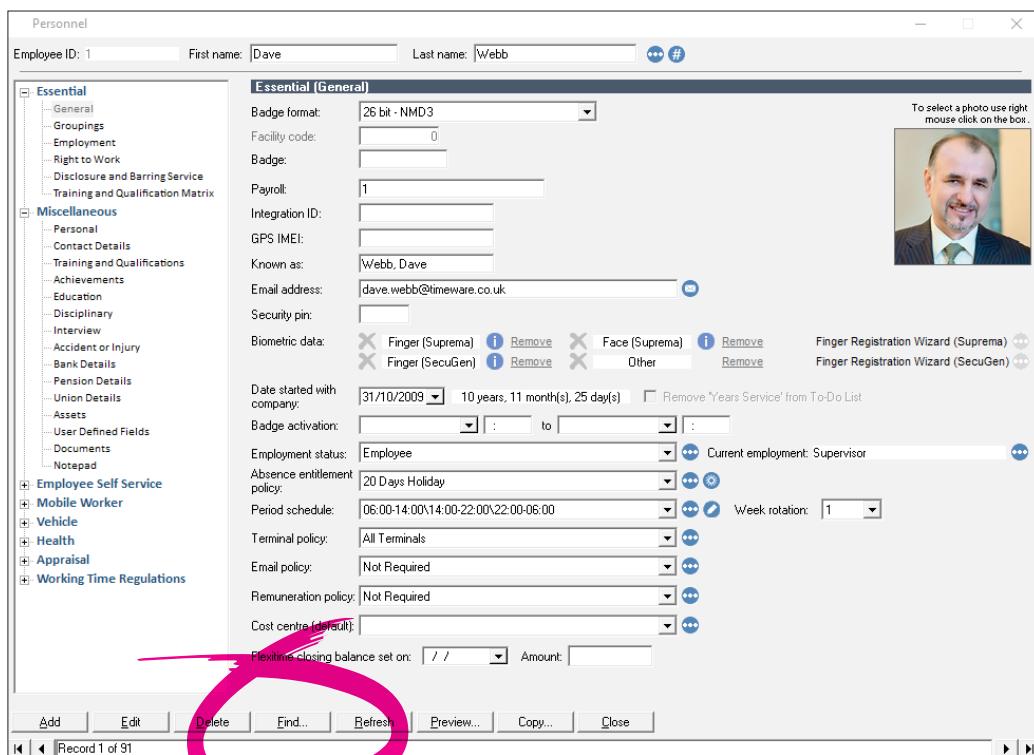
1. To access timeware® personnel, select the Personnel Quick Link,



or, select <File>, then <Personnel>...



2. The personnel screen will appear at the record last viewed by the user.



Personnel

Employee ID: 1 First name: Dave Last name: Webb

**Essential**

- General
- Groupings
- Employment
- Right to Work
- Disclosure and Barring Service
- Training and Qualification Matrix

**Miscellaneous**

- Personal
- Contact Details
- Training and Qualifications
- Achievements
- Education
- Disciplinary
- Interview
- Accident or Injury
- Bank Details
- Pension Details
- Union Details
- Assets
- User Defined Fields
- Documents
- Notepad

**Employee Self Service**

- Mobile Worker
- Vehicle
- Health
- Appraisal
- Working Time Regulations

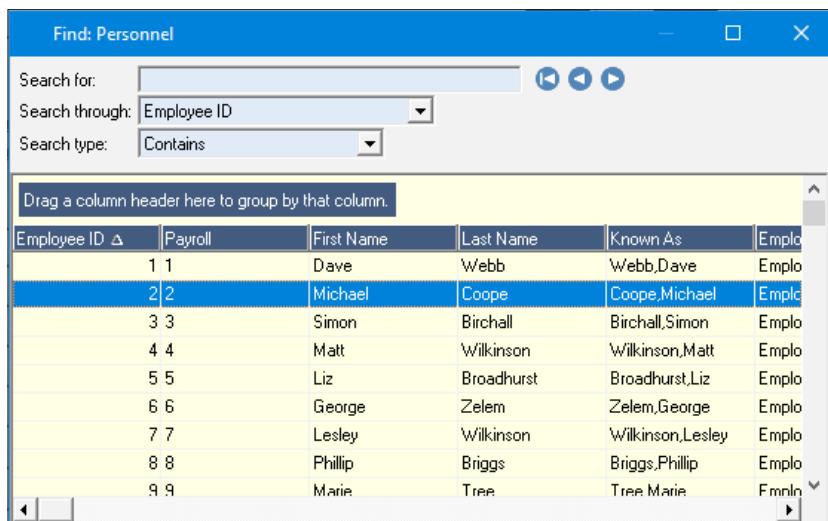
**Essential (General)**

Badge format: 26 bit - NMD3 Facility code: 0 Badge: Payroll: 1 Integration ID: GPS IMEI: Known as: Webb, Dave Email address: dave.webb@timeware.co.uk Security pin: Biometric data: Finger (Suprema) Face (Suprema) Other Date started with company: 31/10/2009 10 years, 11 month(s), 25 day(s) Remove 'Years Service' from To-Do List Badge activation: Employment status: Employee Current employment: Supervisor Absence entitlement policy: 20 Days Holiday Period schedule: 06:00-14:00|14:00-22:00|22:00-06:00 Week rotation: 1 Terminal policy: All Terminals Email policy: Not Required Remuneration policy: Not Required Cost centre (default): Flextime closing balance set on: / / Amount: / /

Add Edit Delete Find... Refresh Preview... Copy... Close

Record 1 of 91

Press <Find> to show list of all timeware® records.



Find: Personnel

Search for:

Search through: Employee ID

Search type: Contains

Drag a column header here to group by that column.

Employee ID	Payroll	First Name	Last Name	Known As	Employment
1 1		Dave	Webb	Webb,Dave	Employee
2 2		Michael	Coope	Coope,Michael	Employee
3 3		Simon	Birchall	Birchall,Simon	Employee
4 4		Matt	Wilkinson	Wilkinson,Matt	Employee
5 5		Liz	Broadhurst	Broadhurst,Liz	Employee
6 6		George	Zelem	Zelem,George	Employee
7 7		Lesley	Wilkinson	Wilkinson,Lesley	Employee
8 8		Phillip	Briggs	Briggs,Phillip	Employee
9 9		Marie	Tree	Tree Marie	Employee

Double click on the relevant employee record to open in personnel screen.

3. Click on <Edit> and begin modifying the required fields.

Personnel

Employee ID: 2 First name: Michael Last name: Cope

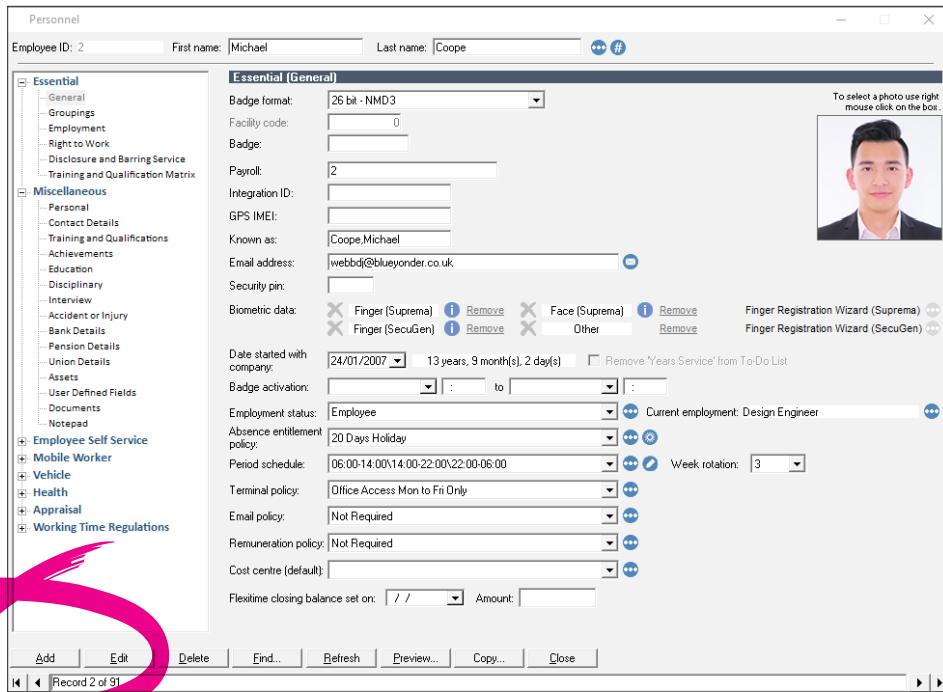
**Essential (General)**

Badge format: 26 bit - NMD3 Facility code: 0 Badge: Payroll: 2 Integration ID: GPS IMEI: Known as: Cope, Michael Email address: webbdj@blueyonder.co.uk Security pin: Biometric data: Finger (Suprema) Face (Suprema) Other Date started with company: 24/01/2007 13 years, 9 month(s), 2 day(s) Remove 'Years Service' from To-Do List Badge activation: Employment status: Employee Current employment: Design Engineer Absence entitlement policy: 20 Days Holiday Period schedule: 06:00-14:00 14:00-22:00 22:00-06:00 Week rotation: 3 Terminal policy: Office Access Mon to Fri Only Email policy: Not Required Remuneration policy: Not Required Cost centre (default): Flexitime closing balance set on: / / Amount: / /

Add Edit Delete Find... Refresh Preview... Copy... Close

Record 2 of 91

4. Next, click <Update> to save the personnel record. The person's details will be sent to the relevant timeware® terminals within thirty seconds.



Personnel

Employee ID: 2 First name: Michael Last name: Coope

**Essential**

- General
- Groupings
- Employment
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- Disclosure and Barring Service
- Training and Qualification Matrix

**Miscellaneous**

- Personal
- Contact Details
- Training and Qualifications
- Achievements
- Education
- Disciplinary
- Interview
- Accident or Injury
- Bank Details
- Pension Details
- Union Details
- Assets
- User Defined Fields
- Documents
- Notepad

**Employee Self Service**

**Mobile Worker**

**Vehicle**

**Health**

**Appraisal**

**Working Time Regulations**

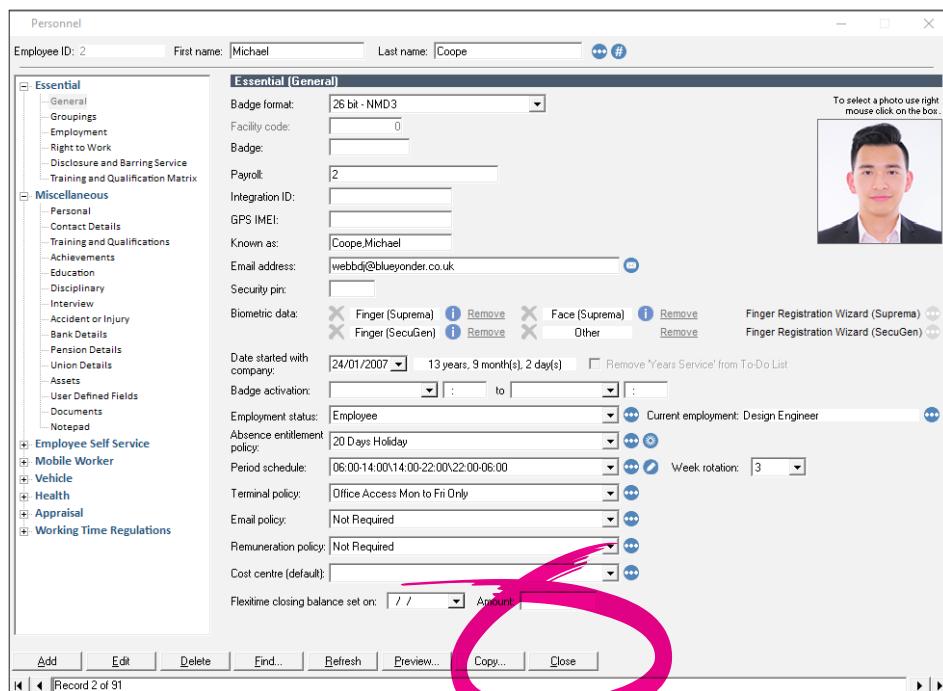
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Add Edit Delete Find... Refresh Preview... Copy... Close

Record 2 of 91

Click <Close> to leave Personnel.



Personnel

Employee ID: 2 First name: Michael Last name: Coope

**Essential**

- General
- Groupings
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**Employee Self Service**

**Mobile Worker**

**Vehicle**

**Health**

**Appraisal**

**Working Time Regulations**

**Essential (General)**

Badge format: 26 bit - NMD3 Facility code: 0 Badge: Payroll: 2 Integration ID: GPS IMEI: Known as: Coope, Michael Email address: webbdj@blueyonder.co.uk Security pin: Biometric data: Finger (Suprema) Face (Suprema) Other Finger Registration Wizard (Suprema) Finger (SecuGen) Face Registration Wizard (SecuGen) Date started with company: 24/01/2007 13 years, 9 month(s), 2 day(s) Remove 'Years Service' from To-Do List Badge activation: Employment status: Employee Current employment: Design Engineer Absence entitlement policy: 20 Days Holiday Period schedule: 06:00-14:00/14:00-22:00/22:00-06:00 Week rotation: 3 Terminal policy: Office Access Mon to Fri Only Email policy: Not Required Remuneration policy: Not Required Cost centre (default): Flexitime closing balance set on: / / Amount: / /

Add Edit Delete Find... Refresh Preview... Copy... Close

Record 2 of 91

## Setting an employee to a leaver



The act of deleting a personnel record removes all data for the person, including historic bookings and absences. Everything associated with that person gets removed! With this in mind, we strongly recommend against deleting personnel records – instead we recommend modifying the person's status to leaver. We will never delete an employee even if requested by you the customer to do so.



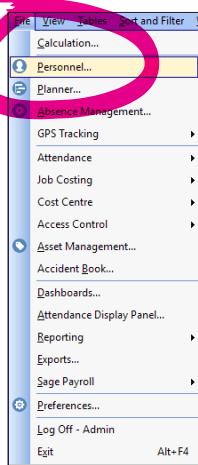
**YouTube**

Link to setting an employee to a leaver

1. To access timeware® personnel, select the Personnel Quick link,



or, select <File>, then <Personnel>...



2. The personnel screen will appear at the record last viewed by the user.

Personnel

Employee ID: 1 First name: Dave Last name: Webb

**Essential (General)**

Badge format: 26 bit - NMD3 Facility code: 0 Badge: 

To select a photo use right mouse click on the box.

Payroll: 1 Integration ID: GPS IMEI: Known as: Webb, Dave Email address: dave.webb@timeware.co.uk

Security pin: Biometric data: Finger (Suprema) Face (Suprema) Other Finger Registration Wizard (Suprema) Finger Registration Wizard (SecuGen)

Date started with company: 31/10/2009 10 years, 11 month(s), 25 day(s) Remove 'Years Service' from To-Do List

Badge activation: Employment status: Employee Current employment: Supervisor

Absence entitlement policy: 20 Days Holiday

Period schedule: 06:00-14:00\14:00-22:00\22:00-06:00 Week rotation: 1

Terminal policy: All Terminals

Email policy: Not Required

Remuneration policy: Not Required

Cost centre (default):

Flexitime closing balance set on: / / Amount: [ ]

Add Edit Find... Refresh Preview... Copy... Close

Record 1 of 91

Press <Find> to show list of all timeware® records.

Find: Personnel

Search for: [ ]

Search through: Employee ID

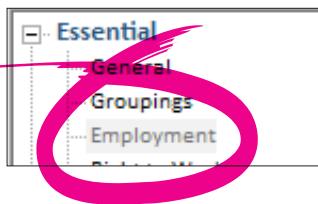
Search type: Contains

Drag a column header here to group by that column.

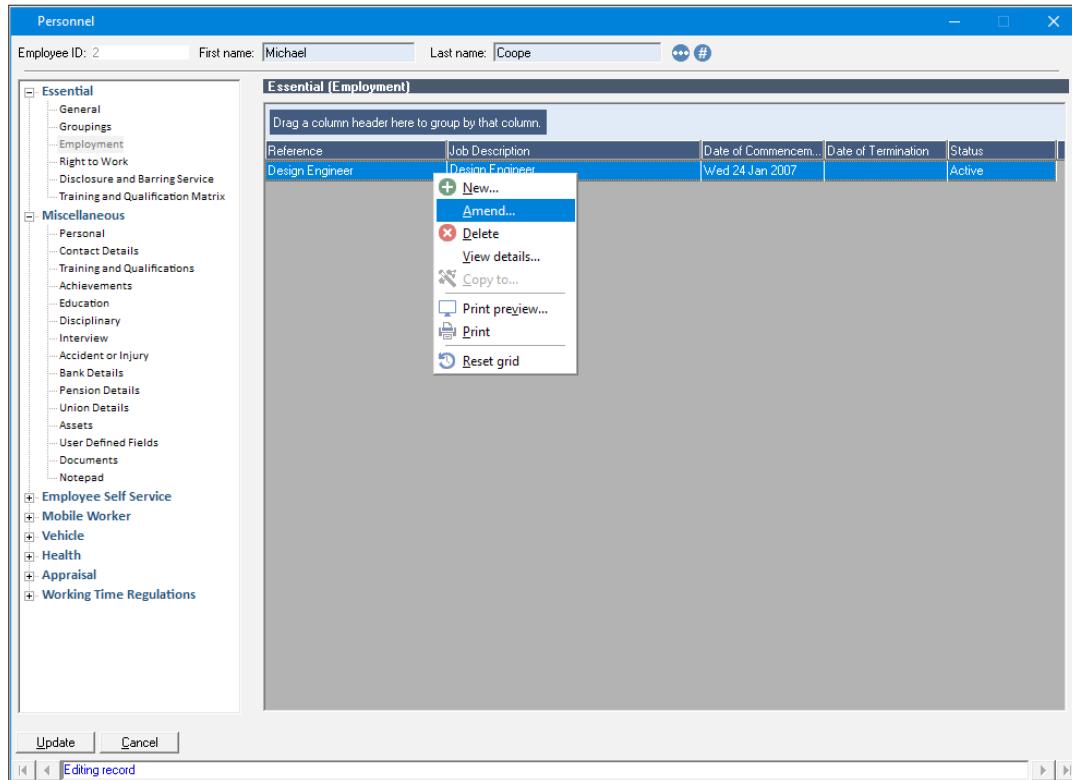
Employee ID	Payroll	First Name	Last Name	Known As	Employment Status
1 1	Dave	Webb	Webb,Dave	Employee	
2 2	Michael	Coope	Coope,Michael	Employee	
3 3	Simon	Birchall	Birchall,Simon	Employee	
4 4	Matt	Wilkinson	Wilkinson,Matt	Employee	
5 5	Liz	Broadhurst	Broadhurst,Liz	Employee	
6 6	George	Zelem	Zelem,George	Employee	
7 7	Lesley	Wilkinson	Wilkinson,Lesley	Employee	
8 8	Phillip	Briggs	Briggs,Phillip	Employee	
9 9	Marie	Tree	Tree,Marie	Employee	
10 10	Nathan	Louis	Louis,Nathan	Employee	
11 11	Hannah	Shaw	Shaw,Hannah	Employee	
12 12					

Double click on the relevant employee record to open in personnel screen.

3. Click on <Edit> and navigate to Employment in the Essential section



Right click on current employment record and then <amend>.



4. Add a date of termination and change employment status to leaver.

Personnel 'Employment' - (New)

**Details**

Reference:	Design Engineer	Date of commencement:	24/01/2007	change employment status to:	Employee
Job description:	Design Engineer	Probation period (days):	/ /	change employment status to:	
Reporting to:		Probation end date:	/ /	change employment status to:	
Training and qual. policy:		Notice given date:	/ /	change employment status to:	
Pay type:		Notice period (days):	/ /	change employment status to:	
Amount:		Date of termination:	18/12/2020	change employment status to:	Leaver
Tax code:		Date of last payroll:	/ /	change employment status to:	

Remove 'Probation Period' from To-Do List  
 Remove 'Date of Termination' from To-Do List

Differ, contract and other information:

Comments:

**Document**

Description	File Name	Date and Time	File Size (MB)
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Cancel | Ok

Click <Ok>.

Personnel

Employee ID: 2 First name: Michael Last name: Cope

**Essential**

- General
- Groupings
- Employment
- Right to Work
- Disclosure and Barring Service
- Training and Qualification Matrix

**Miscellaneous**

- Personal
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- Pension Details
- Union Details
- Assets
- User Defined Fields
- Documents
- Notepad

**Employee Self Service**

- Mobile Worker
- Vehicle
- Health
- Appraisal
- Working Time Regulations

**Essential (Employment)**

Drag a column header here to group by that column.

Reference	Job Description	Date of Commencem...	Date of Termination	Status
Design Engineer	Design Engineer	Wed 24 Jan 2007		Active

**Action Menu**

- + New...
- Amend... (highlighted)
- Delete
- View details...
- Copy to...
- Print preview...
- Print
- Reset grid

Update | Cancel

Editing record

Then click <Update>.

- Once we reach the employees termination date, the system will automatically change the employee to a leaver