

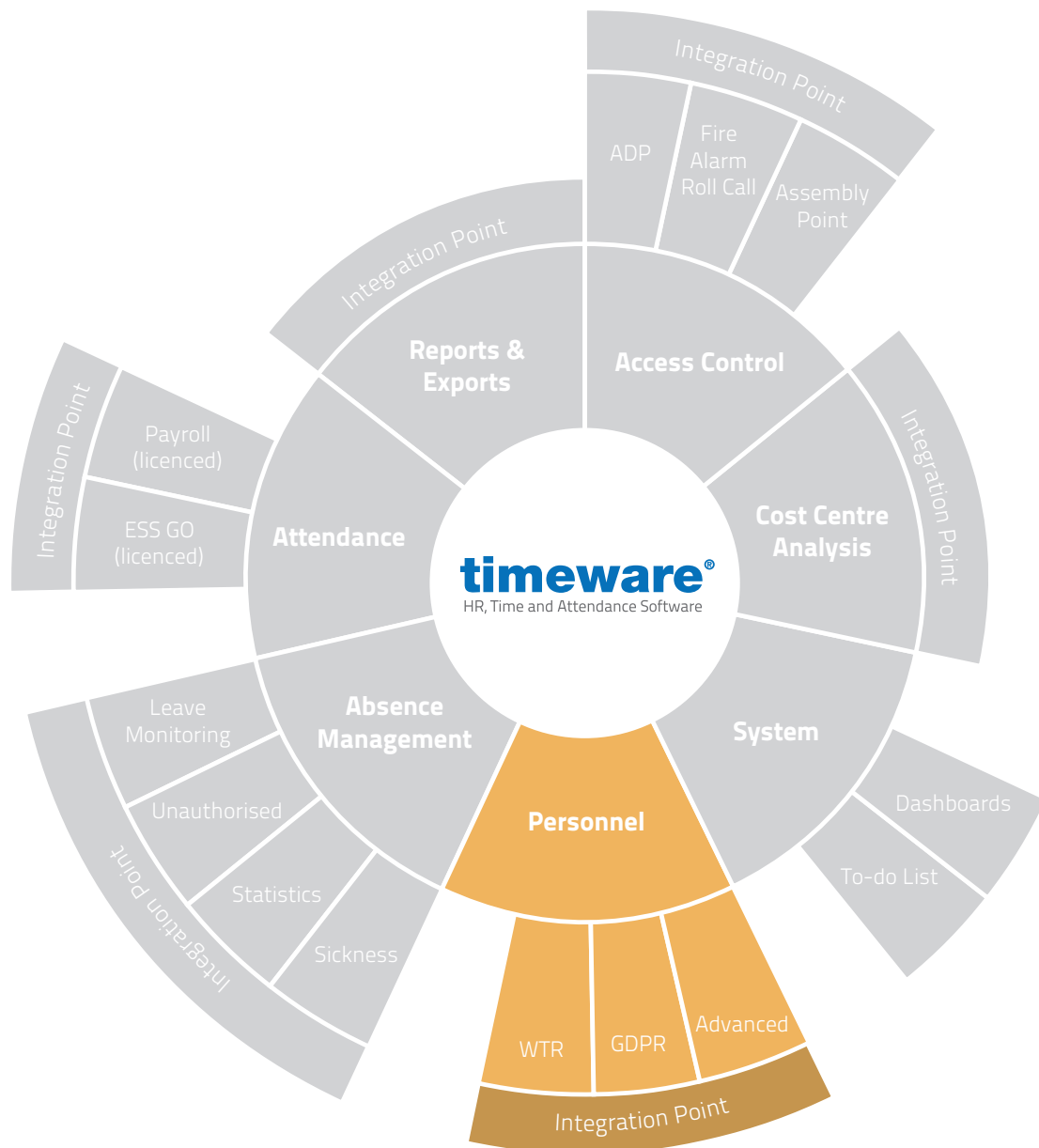


timeware®

HR, Time and Attendance Software

ON PREMISE
SOFTWARE

Training guide: Basic Personnel



Certificate No:
491342025

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 NMD³ Ltd

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Contents

Course

Duration

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.



Link to understanding
timeware® personnel

The screenshot displays the timeware Personnel database interface with three overlapping windows for Employee ID: 1, First name: Dave, Last name: Webb.

Personnel - Essential (General)

Badge format: 26 bit - NMD3
 Facility code: 0
 Badge: 1
 Payroll: 1
 Integration ID:
 GPS IMEI:
 Known as: Webb, Dave
 Email address: dave.webb@timeware.co.uk
 Security pin:
 Biometric data: ☒ Finger (Suprema) ☒ Finger (SecuGen)
 Date started with company: 31/10/2009
 Badge activation:
 Employment status: Employee
 Absence entitlement policy: 20 Days Holiday
 Period schedule: 06:00-14:00\14:00-22:00
 Terminal policy: All Terminals
 Email policy: Not Required
 Remuneration policy: Not Required

Personnel - Essential (Groupings)

The fields below are used for grouping employees together. This is mainly for reporting purposes and enquiries.

Company: A & B Manufacturing
 Department: Steel Prep
 Section: Supervisor
 Pay Type: Hourly Paid
 Line Manager:
 Grouping 06:
 Grouping 07:
 Grouping 08:
 Grouping 09:
 Grouping 10:

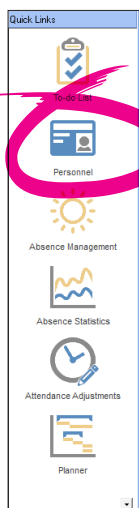
Personnel - Essential (Employment)

Drag a column header here to group by that column.

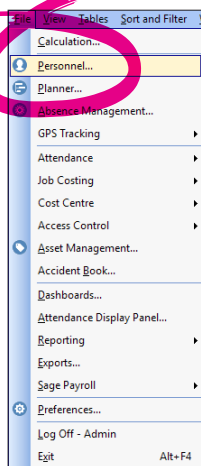
Reference	Job Description	Date of Commencement	Date of Termination	Status
Supervisor	Supervisor	Sat 31 Oct 2009		Active

Adding a new employee

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



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



Link to adding a new employee

- 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:
 Payroll: 1
 Integration ID:
 GPS IMEI:
 Known as: Webb, Dave
 Email address: dave.webb@timeware.co.uk
 Security pin:
 Biometric data: ☒ Finger (Suprema) ☒ Finger (SecuGen) ☒ 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):
 Flexitime closing balance set on: / / Amount:
 Add Edit Delete Find... Refresh Preview... Copy... Close

Personnel

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

Essential (General)

Badge format: 26 bit - NMD3
 Facility code: 0
 Badge:
 Payroll: 2
 Integration ID:
 GPS IMEI:
 Known as: Coope, Michael
 Email address: webbd@blueyonder.co.uk
 Security pin:
 Biometric data: ☒ Finger (Suprema) ☒ Finger (SecuGen) ☒ 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: 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

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!

Personnel

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

Essential (General)

Badge format: 26 bit - NMD3
Facility code: 0
Badge:
Payroll: 2
Integration ID:
GPS IMEI:
Known as: Coope, Michael
Email address: webdy@blueyonder.co.uk
Security pin:
Biometric data: ☒ Finger (Suprema) ☒ Finger (SecuGen) ☒ 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: 20 Days Holiday
Period schedule: 06:00-14:00/14:00-22:00/22:00-06:00 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

- 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.

Personnel

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.

Personnel

Employee ID: First name: Michael Last name: Cooper

Essential (Employment)

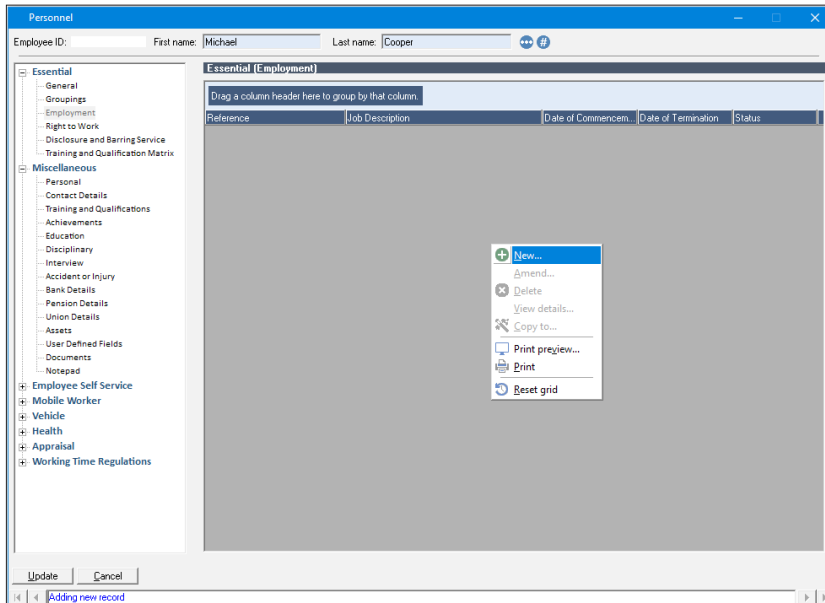
Drag a column header here to group by that column.

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

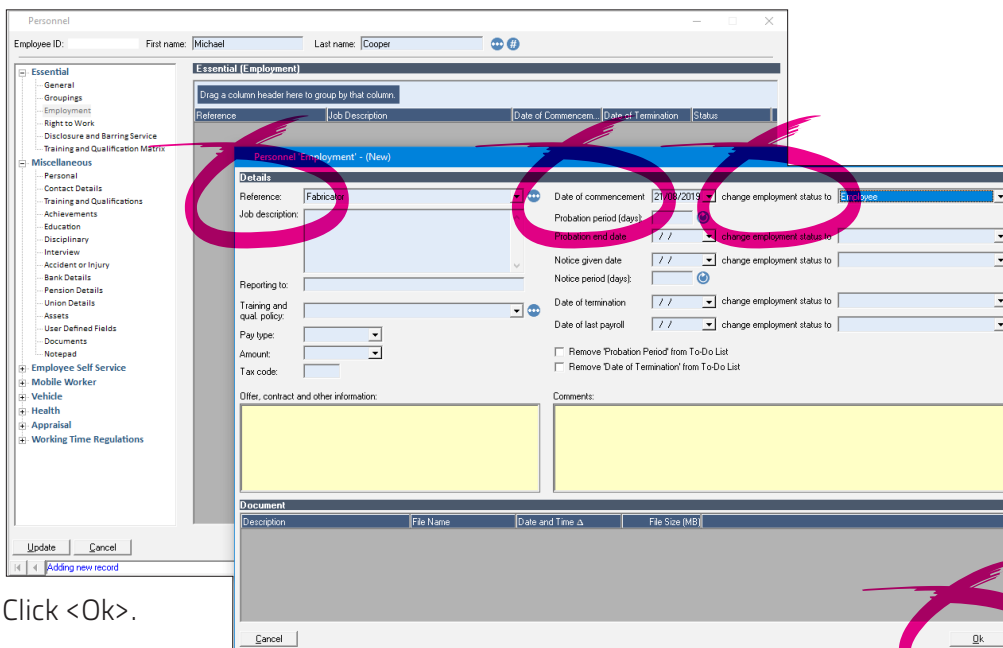
The person's job role i.e. Fabrication Manager or Accountant.

Date of Commencement

The date the person started in the selected job role.

Employment status

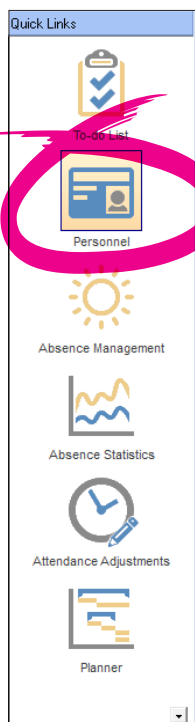
The person's status within the company i.e. Agency, Staff or Employee etc.



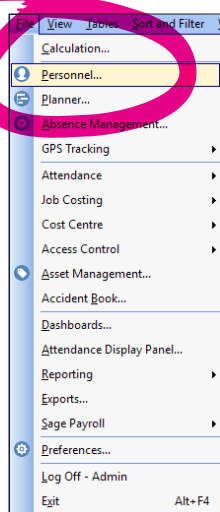
Click <Ok>.

Making amendments to an existing employee

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



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



Link to making amendments to an existing employee

- 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:
 Payroll: 1
 Integration ID:
 GPS IMEI:
 Known as: Webb, Dave
 Email address: dave.webb@timeware.co.uk
 Security pin:
 Biometric data:
 Date started with company: 31/10/2009 10 years, 11 month(s), 25 day(s)
 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 Delete Find... Refresh Preview... Copy... Close

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	Emplo
2	2	Michael	Coope	Coope, Michael	Emplo
3	3	Simon	Birchall	Birchall, Simon	Emplo
4	4	Matt	Wilkinson	Wilkinson, Matt	Emplo
5	5	Liz	Broadhurst	Broadhurst, Liz	Emplo
6	6	George	Zelem	Zelem, George	Emplo
7	7	Lesley	Wilkinson	Wilkinson, Lesley	Emplo
8	8	Phillip	Briggs	Briggs, Phillip	Emplo
9	9	Marie	Tree	Tree Marie	Fmnln

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

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

The screenshot shows the 'Personnel' window for employee Michael Coope. The 'Essential (General)' tab is active, displaying various fields for employee information. A red circle highlights the 'Edit' button at the bottom left of the window.

Personnel

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

Essential (General)

Badge format: 26 bit - NMD3
 Facility code: 0
 Badge:
 Payroll: 2
 Integration ID:
 GPS IMEI:
 Known as: Coope, Michael
 Email address: webbd@blueyonder.co.uk
 Security pin:
 Biometric data:
 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:
 To select a photo use right mouse click on the box.

Buttons: Add, Edit, Delete, Find..., Refresh, Preview..., Copy..., Close

Record 2 of 91

- 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)

Badge format: 26 bit - NMD3
Facility code: 0
Badge:
Payroll: 2
Integration ID:
GPS IMEI:
Known as: Coope, Michael
Email address: webbd@blueyonder.co.uk
Security pin:
Biometric data:
Date started with company: 24/01/2007 13 years, 9 month(s), 2 day(s)
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):
Flextime closing balance set on: / / Amount:
To select a photo use right mouse click on the box.

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

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)

Badge format: 26 bit - NMD3
Facility code: 0
Badge:
Payroll: 2
Integration ID:
GPS IMEI:
Known as: Coope, Michael
Email address: webbd@blueyonder.co.uk
Security pin:
Biometric data:
Date started with company: 24/01/2007 13 years, 9 month(s), 2 day(s)
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):
Flextime closing balance set on: / / Amount:
To select a photo use right mouse click on the box.

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

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

Record 2 of 91

Setting an employee to a leaver

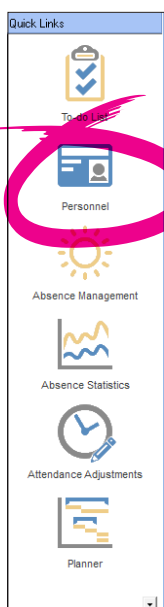


The act of deleting a personnel record removes all data for the person, including historic bookings and absences. Everything associated with that person gets removed! With this in mind, we strongly recommend against deleting personnel records – instead we recommend modifying the person's status to leaver.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

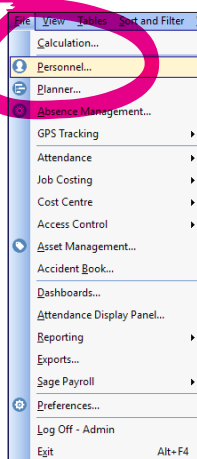


Link to setting an employee to a leaver

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



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



- 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:
 Payroll: 1
 Integration ID:
 GPS IMEI:
 Known as: Webb, Dave
 Email address: dave.webb@timeware.co.uk
 Security pin:
 Biometric data:
 Date started with company: 31/10/2009 10 years, 11 month(s), 25 day(s)
 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 Delete Find... Refresh Preview... Copy... Close

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

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

Personnel

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

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: 2

Integration ID:

GPS IMEI:

Known as: Coope, Michael

Email address: webbdj@blueyonder.co.uk

Security pin:

Biometric data: ☒ Finger (Suprema) ☒ Face (Suprema) ☒ Finger (SecuGen) ☒ 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: : to :

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): / / Amount:

Flexitime closing balance set on: / / Amount:

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

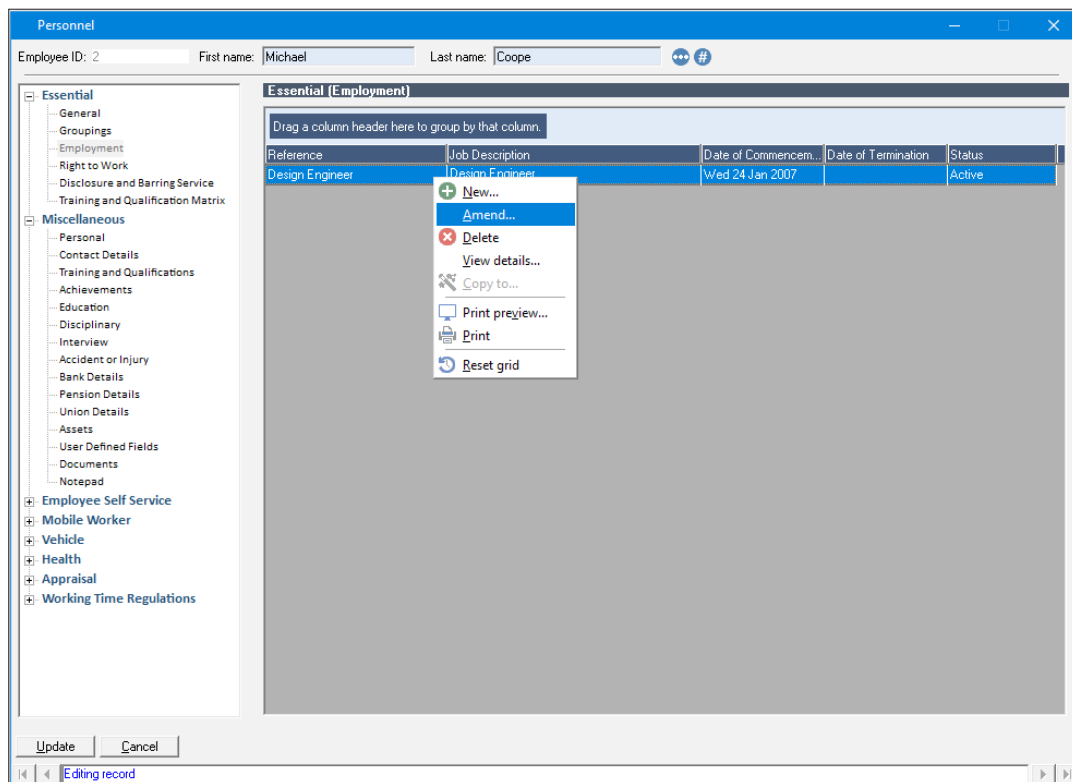
Record 2 of 91

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

Essential

- General
- Groupings
- Employment

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): Probation end date: Notice given date: Notice period (days):

Reporting to: Training and qual. policy: Pay type: Amount: Tax code:

Date of termination: 18/12/2020 change employment status to: Leaver

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

Offer, 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: Coope

Essential (Employment)

Drag a column header here to group by that column.

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

New... Amend... Delete View details... Copy to... Print preview... Print Reset grid

Update Cancel

Editing record

Then click <Update>.

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