

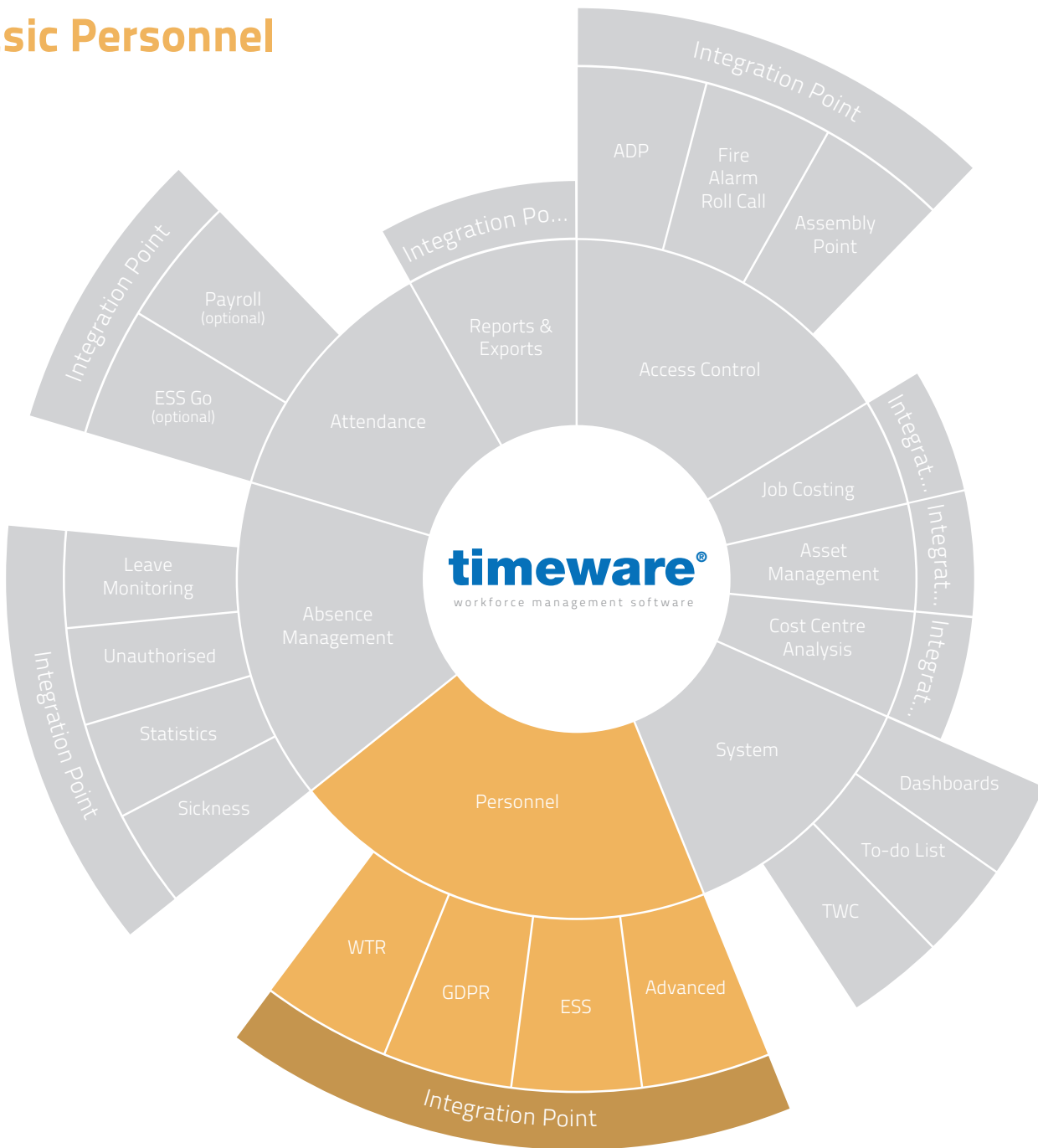


# timeware®

workforce management software

## Training guide:

### Basic Personnel



## 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.

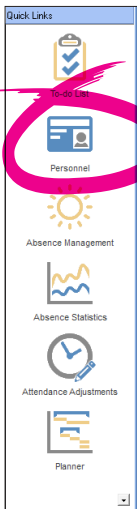


Link to understanding timeware® personnel

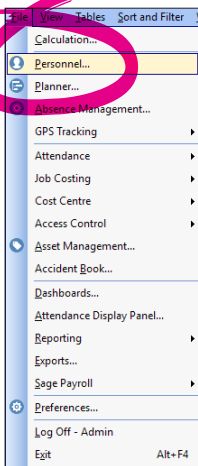
Reference	Job Description	Date of Commencement	Date of Termination	Status
Supervisor	Supervisor	31 Oct 2009		Active

## Adding a new employee

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



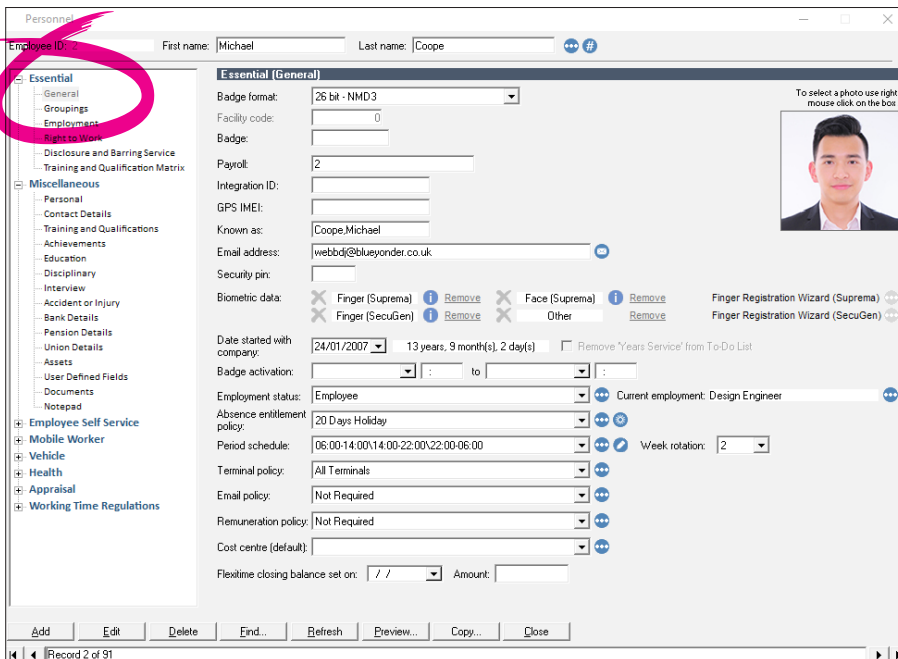
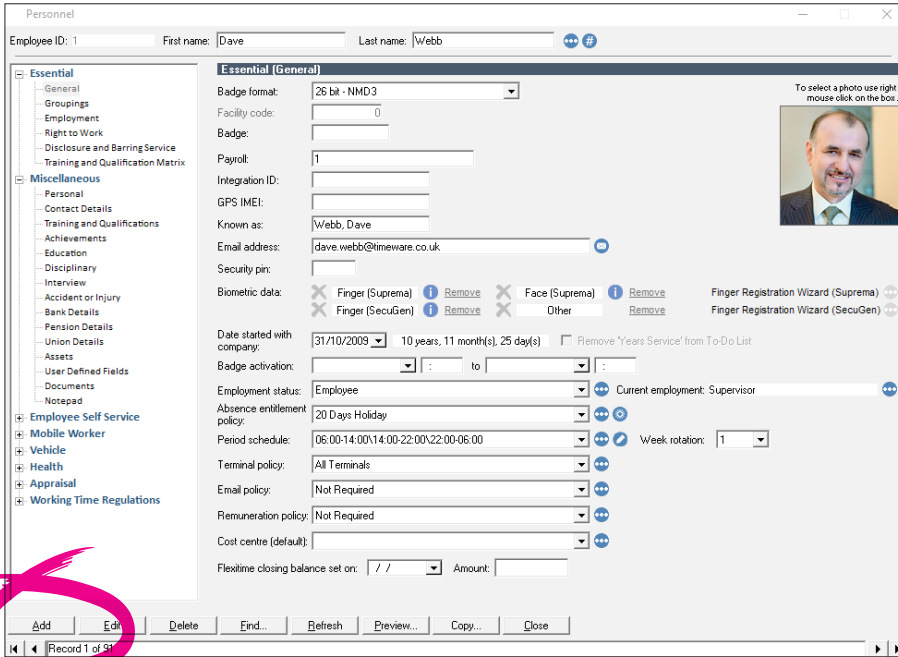
or, select <File>, then <Personnel>...



Link to adding a new employee

2. 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.



### 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.

The screenshot shows the 'Personnel' window with the 'Essential (Groupings)' tab selected. The left-hand navigation pane shows the 'Essentials' section expanded to 'Groupings'. The main area contains the following fields:

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

Buttons for 'Update' and 'Cancel' are at the bottom left. A status bar at the bottom indicates 'Adding new record'.

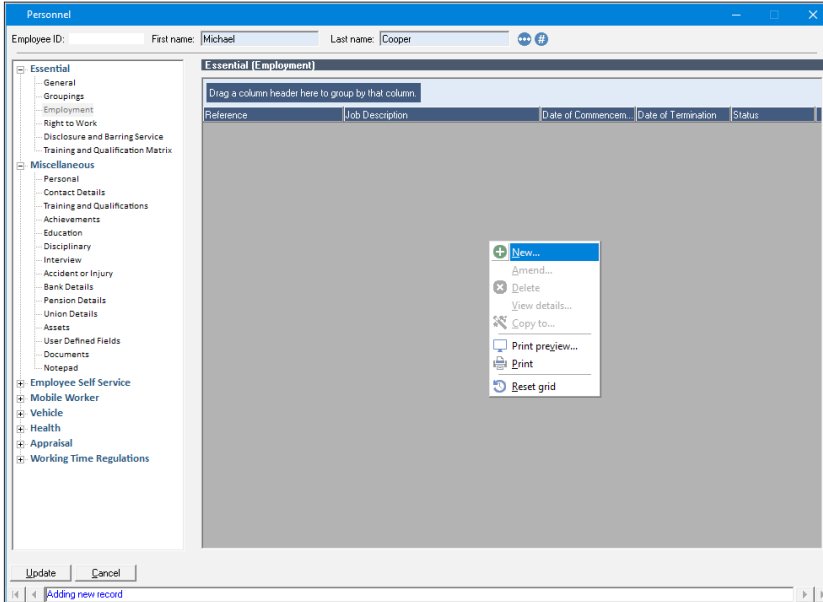
Next, click on the Employment heading in the Essentials section.

The screenshot shows the 'Personnel' window with the 'Essential (Employment)' tab selected. The left-hand navigation pane shows the 'Essentials' section expanded to 'Employment', which is circled in pink. The main area contains a table with the following headers:

Reference	Job Description	Date of Commencem...	Date of Termination	Status
Drag a column header here to group by that column.				

Buttons for 'Update' and 'Cancel' are at the bottom left. A status bar at the bottom indicates 'Adding new record'.

## 5. Right click and press <New>



Complete the following fields;

### Reference

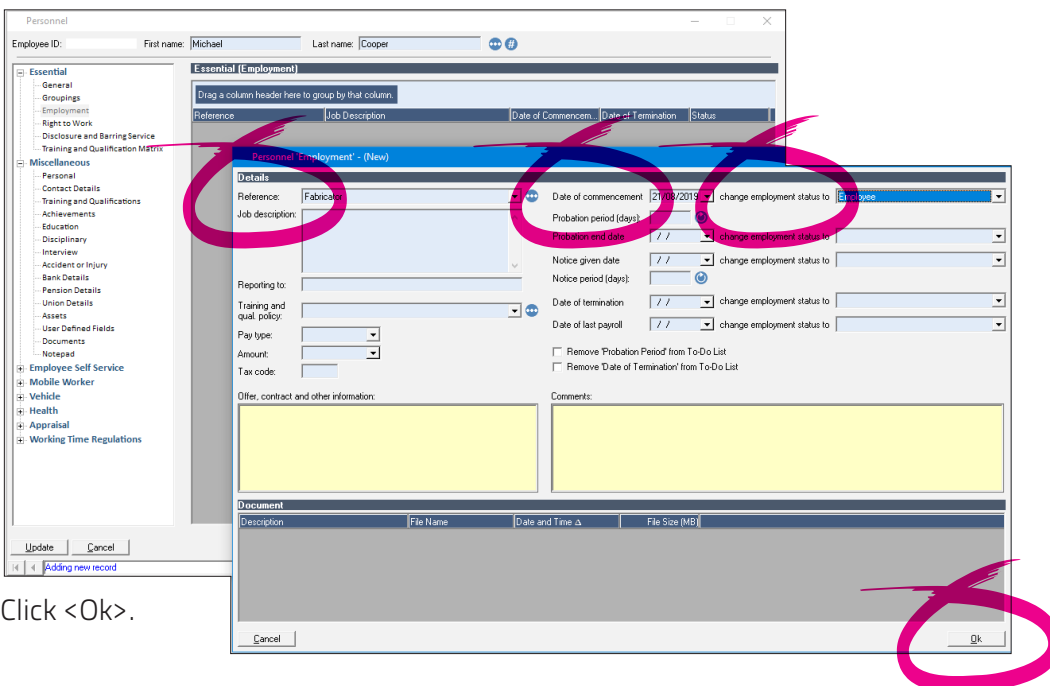
The person's job role i.e. Fabrication Manager or Accountant.

### 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.

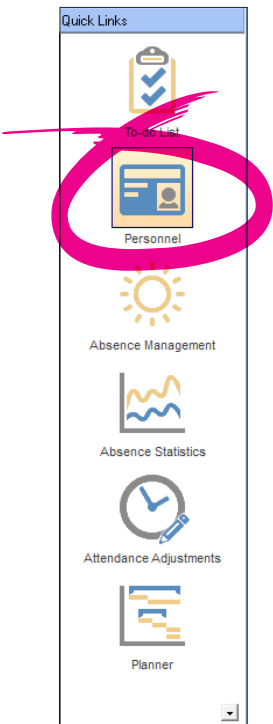


Click <Ok>.

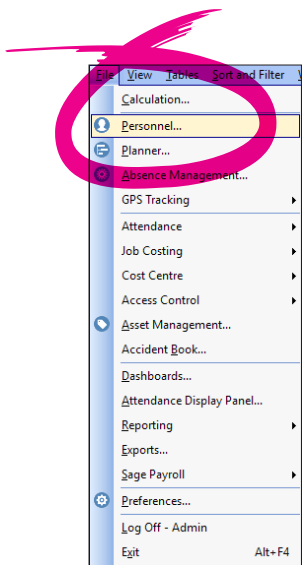


## Making amendments to an existing employee

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

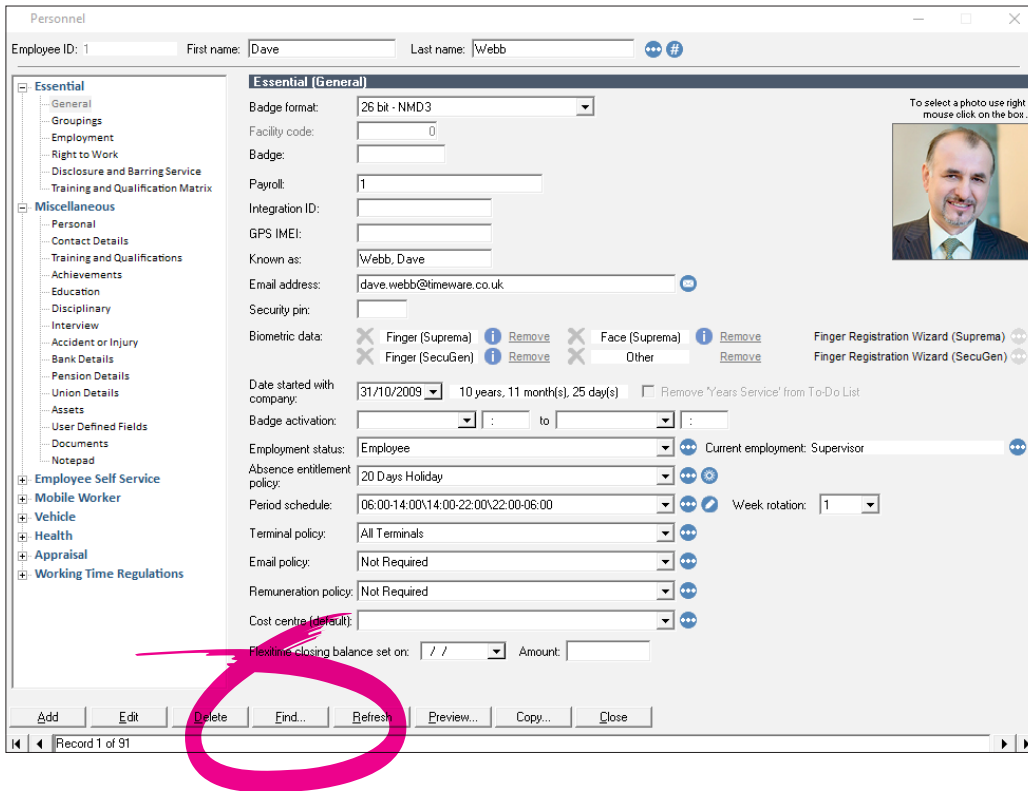


or, select <File>, then <Personnel>...

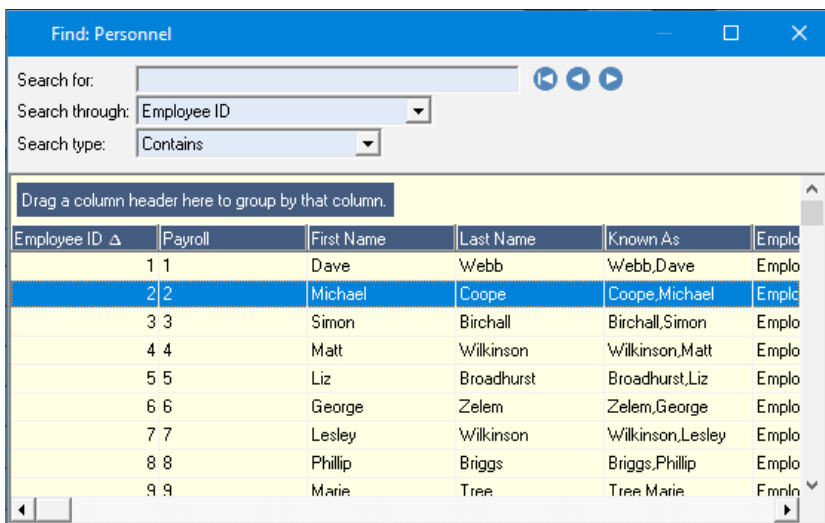


Link to making amendments to an existing employee

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



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



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 editing. A pink 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:  
X Finger (Suprema) Remove    X Face (Suprema) Remove    Finger Registration Wizard (Suprema) [ ]  
X Finger (SecuGen) Remove    X Other Remove    Finger 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: [ ] : [ ] 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): [ ]  
Flexitime closing balance set on: / /    Amount: [ ]

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.

The screenshot shows the 'Personnel' record for Michael Coope. The 'Essential (General)' tab is active, displaying various fields such as 'Badge format', 'Facility code', 'Payroll', 'Integration ID', 'GPS IMEI', 'Known as', 'Email address', 'Security pin', 'Biometric data', 'Date started with company', 'Badge activation', 'Employment status', 'Absence entitlement policy', 'Period schedule', 'Terminal policy', 'Email policy', 'Remuneration policy', and 'Cost centre (default)'. A photo of Michael Coope is visible in the top right corner. The 'Update' button at the bottom of the form is circled in pink.

Click <Close> to leave Personnel.

The screenshot shows the same 'Personnel' record for Michael Coope. The 'Close' button at the bottom of the form is circled in pink.

## Setting an employee to a leaver

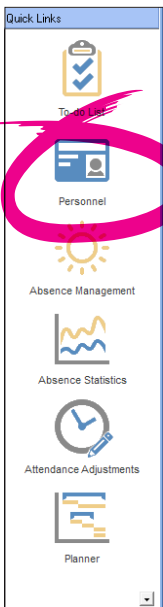


The act of deleting a personnel record removes all data for the person, including historic bookings and absences. Everything associated with that person gets removed! With this in mind, we strongly recommend against deleting personnel records – instead we recommend modifying the person's status to leaver.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

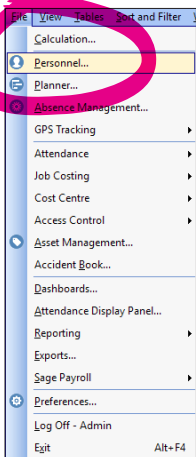


Link to setting an employee to a leaver

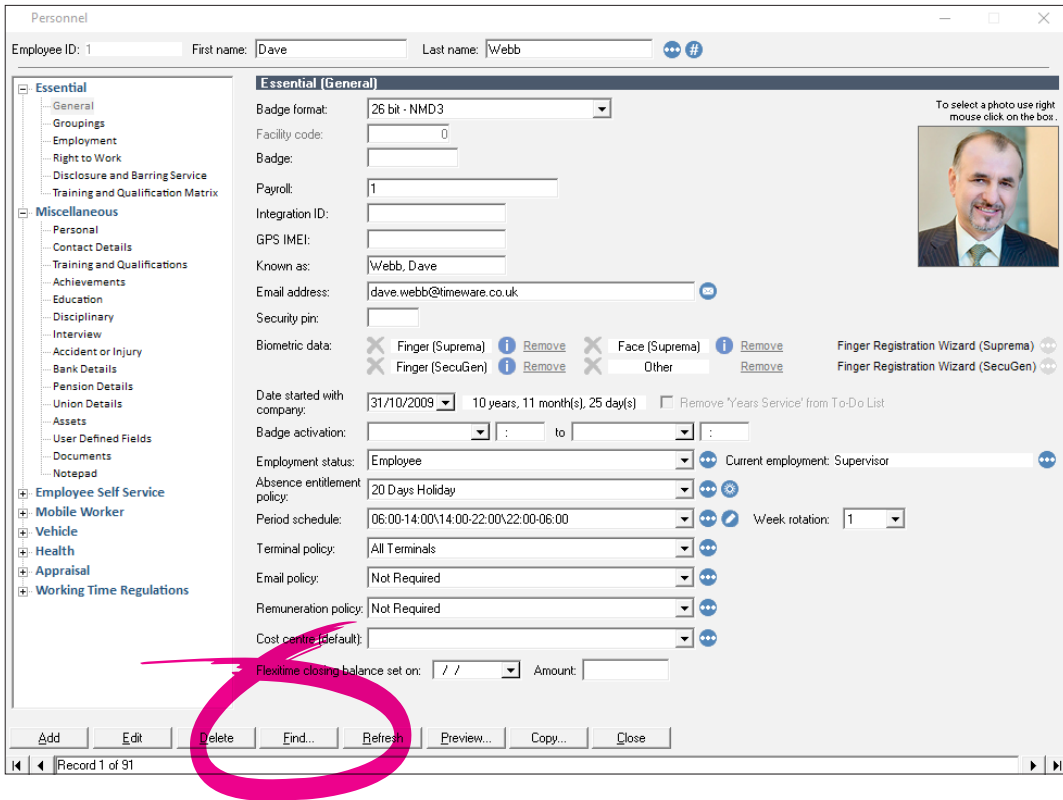
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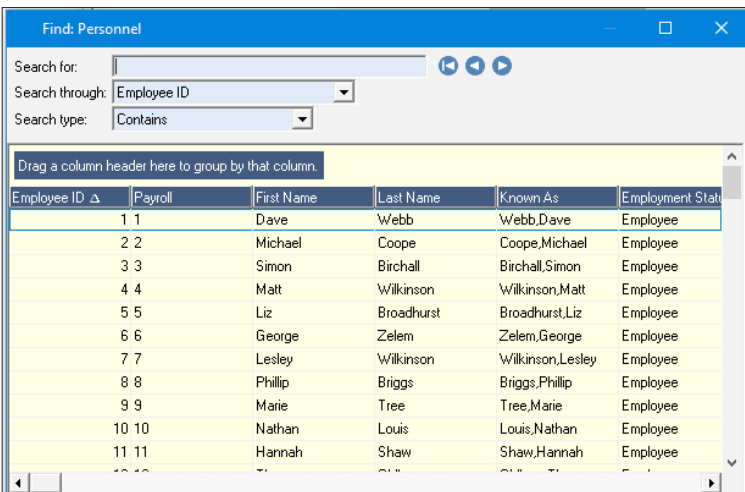
or, select <File>, then <Personnel>...



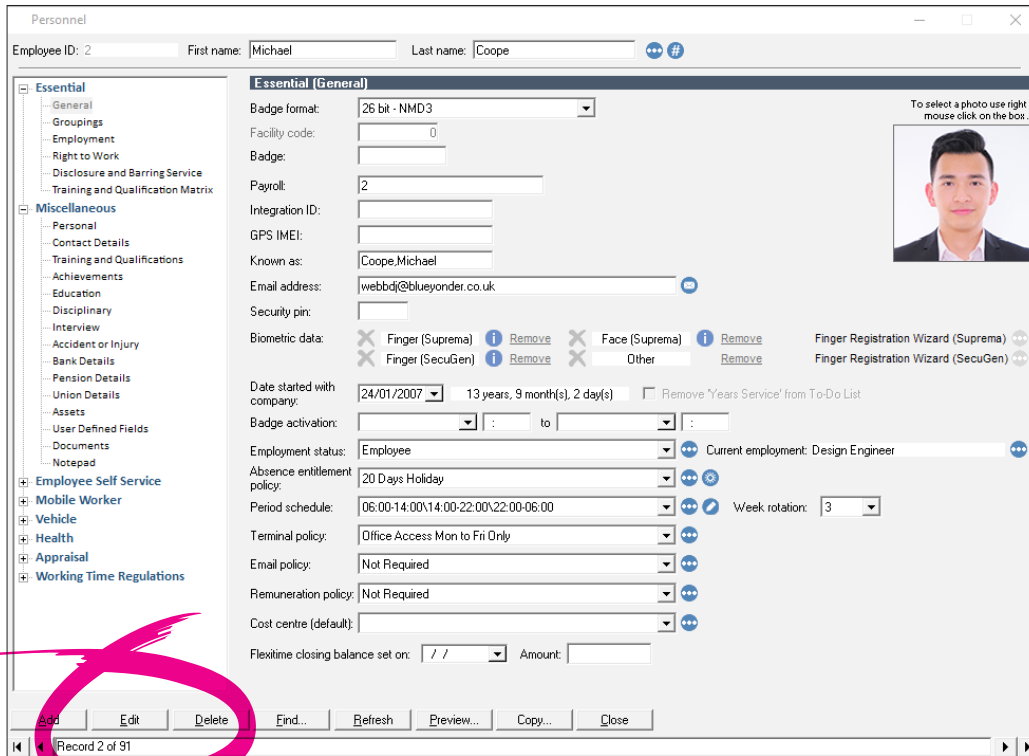
2. The personnel screen will appear at the record last viewed by the user.



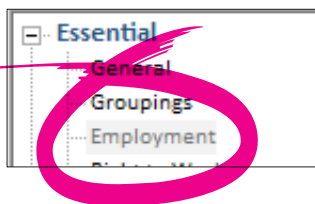
Press <Find> to show list of all timeware® records.



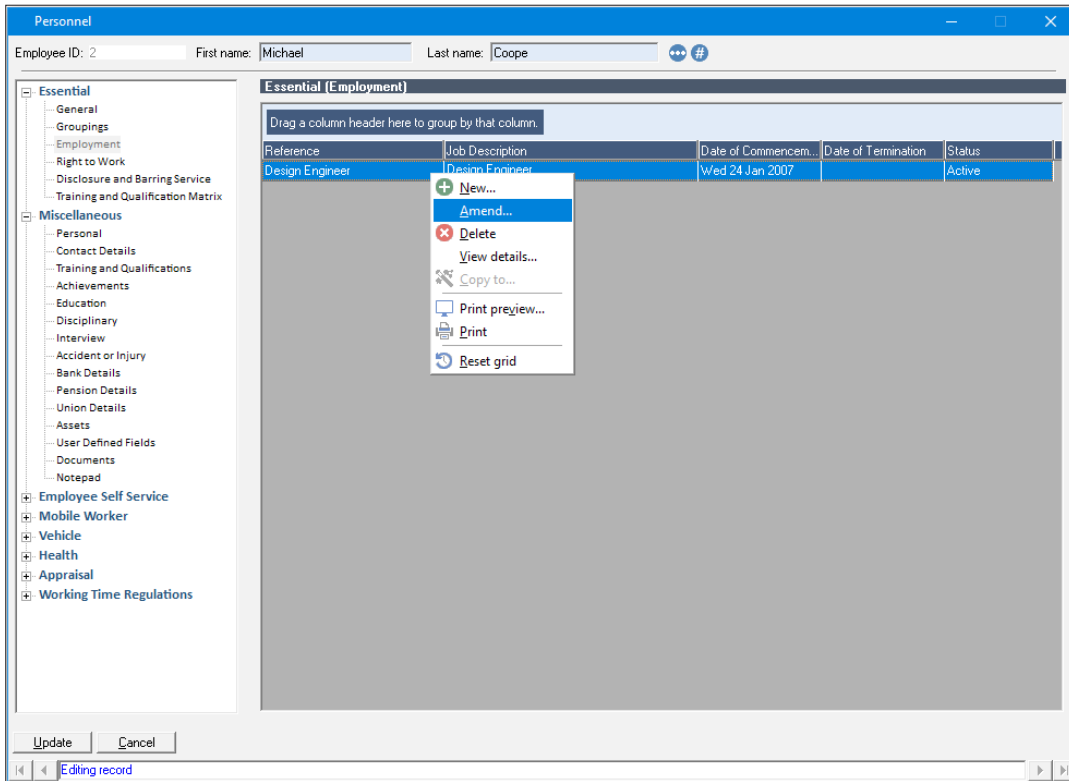
Double click on the relevant employee record to open in personnel screen.



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): Probation end date: // change employment status to: Notice given date: // change employment status to: Notice period (days): Date of termination: 18/12/2020 change employment status to: Leaver

Date of last payroll: // change employment status to: 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

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