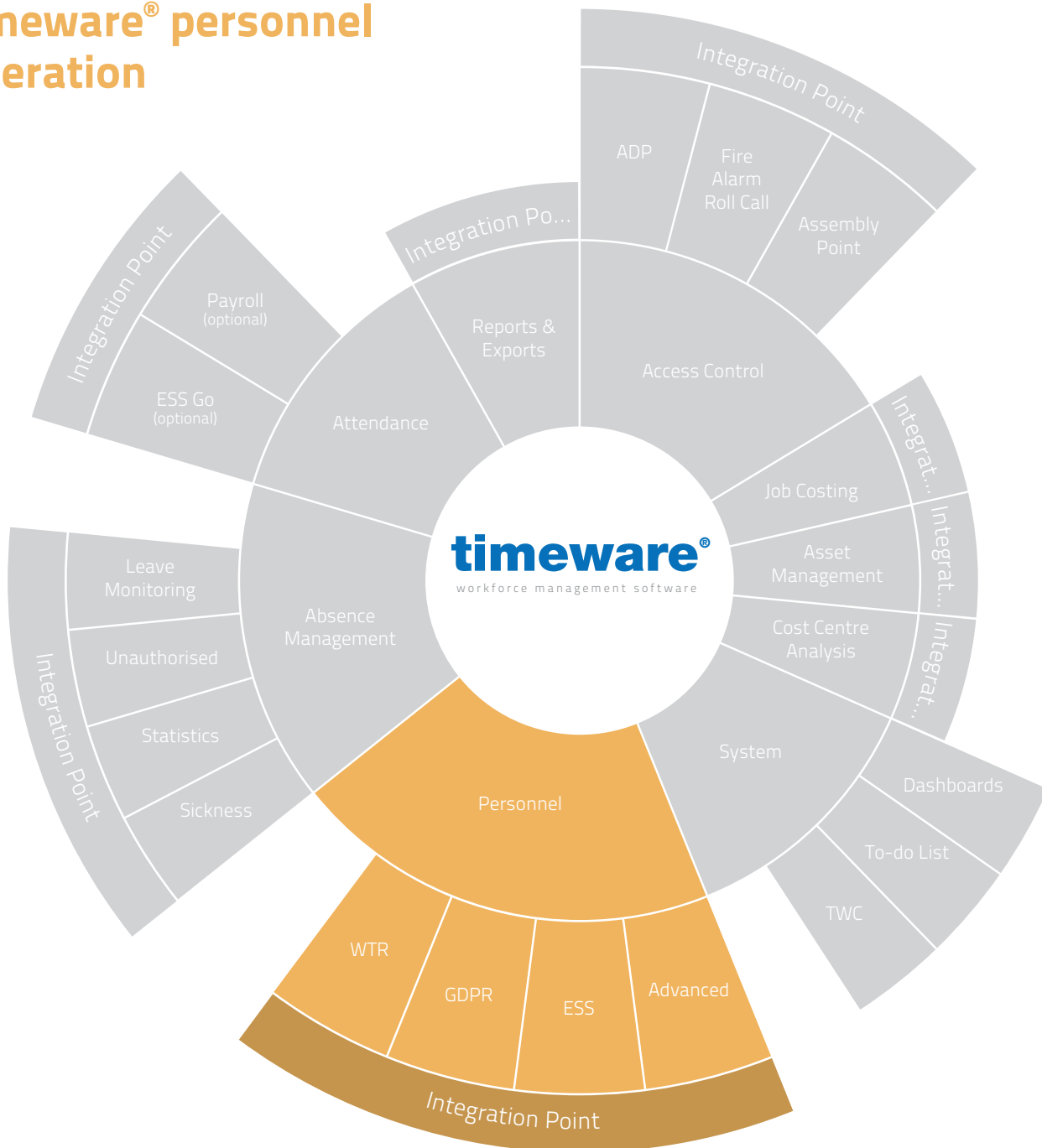


timeware®

workforce management software

Training guide:

timeware® personnel operation



Duration approximately:
2-2.5 hours

2.1 How to create a new employee

The screenshot shows the 'Personnel' form in the Timeware software. The 'Employee ID' field is empty, and the 'First name' and 'Last name' fields are also empty. The form is divided into several sections: 'Essential (General)', 'Miscellaneous', 'ESS Go', 'Employee Self Service', 'Mobile Worker', 'Vehicle', 'Health', 'Appraisal', and 'Working Time Regulations'. The 'Essential (General)' section is expanded, showing fields for 'Badge format', 'Facility code', 'Badge', 'Payroll', 'Integration ID', 'Known as', 'Work email address', 'Security pin', 'Biometric data', 'Date started with company', 'Badge activation', 'Employment status', 'Absence entitlement policy', 'Period schedule', 'Access group', 'Terminal policy', 'Email policy', 'Remuneration policy', 'Cost centre (default)', and 'Flexitime closing balance set on'. The 'Biometric data' section has options for 'Finger (Suprema)', 'Finger (SecuGen)', 'Face (Suprema)', and 'Face (SecuGen)'. The 'Date started with company' field is set to '7 years, 7 months, 7 days'. The 'Employment status' is set to 'Current employment'. The 'Period schedule' is set to '06:00:14:00:22:00:06:00'. The 'Access group' is set to '123Key'. The 'Terminal policy' is set to 'Holiday's Finalised'. The 'Email policy' is set to 'Holiday's Finalised'. The 'Remuneration policy' is set to 'Grade5'. The 'Cost centre (default)' is set to '123456'. The 'Flexitime closing balance set on' is set to '7/7' and 'Amount' is set to '0'. The 'Update' and 'Cancel' buttons are visible at the bottom.

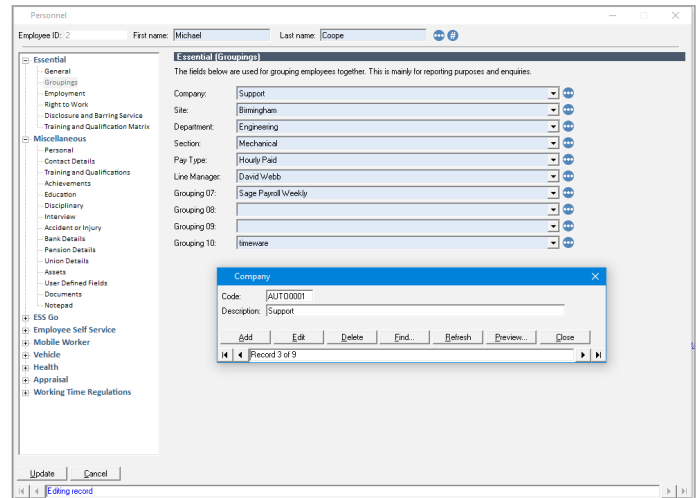
2.2 How to delete or a remove an employee

The screenshot shows the 'Personnel' form in the Timeware software. The 'Employee ID' field is set to '2', and the 'First name' and 'Last name' fields are set to 'Michael' and 'Cooper' respectively. The form is divided into several sections: 'Essential (General)', 'Miscellaneous', 'ESS Go', 'Employee Self Service', 'Mobile Worker', 'Vehicle', 'Health', 'Appraisal', and 'Working Time Regulations'. The 'Essential (General)' section is expanded, showing fields for 'Badge format', 'Facility code', 'Badge', 'Payroll', 'Integration ID', 'Known as', 'Work email address', 'Security pin', 'Biometric data', 'Date started with company', 'Badge activation', 'Employment status', 'Absence entitlement policy', 'Period schedule', 'Access group', 'Terminal policy', 'Email policy', 'Remuneration policy', 'Cost centre (default)', and 'Flexitime closing balance set on'. The 'Biometric data' section has options for 'Finger (Suprema)', 'Finger (SecuGen)', 'Face (Suprema)', and 'Face (SecuGen)'. The 'Date started with company' field is set to '7 years, 7 months, 7 days'. The 'Employment status' is set to 'Design Engineer'. The 'Period schedule' is set to '06:00:14:00:22:00:06:00'. The 'Access group' is set to '123Key'. The 'Terminal policy' is set to 'Holiday's Finalised'. The 'Email policy' is set to 'Holiday's Finalised'. The 'Remuneration policy' is set to 'Grade5'. The 'Cost centre (default)' is set to '123456'. The 'Flexitime closing balance set on' is set to '7/7' and 'Amount' is set to '0'. A dialog box is open in the center of the screen with the text 'Do you wish to delete this record?' and 'Yes' and 'No' buttons. The 'Delete' button is highlighted in red at the bottom of the form.

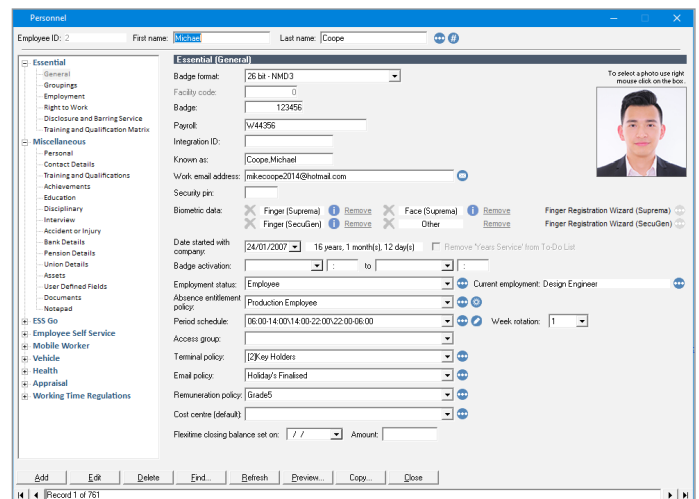
2.3 How to edit the details of an employee

The screenshot shows the 'Personnel' form in the Timeware software. The 'Employee ID' field is set to '2', and the 'First name' and 'Last name' fields are set to 'Michael' and 'Cooper' respectively. The form is divided into several sections: 'Essential (General)', 'Miscellaneous', 'ESS Go', 'Employee Self Service', 'Mobile Worker', 'Vehicle', 'Health', 'Appraisal', and 'Working Time Regulations'. The 'Essential (General)' section is expanded, showing fields for 'Badge format', 'Facility code', 'Badge', 'Payroll', 'Integration ID', 'Known as', 'Work email address', 'Security pin', 'Biometric data', 'Date started with company', 'Badge activation', 'Employment status', 'Absence entitlement policy', 'Period schedule', 'Access group', 'Terminal policy', 'Email policy', 'Remuneration policy', 'Cost centre (default)', and 'Flexitime closing balance set on'. The 'Biometric data' section has options for 'Finger (Suprema)', 'Finger (SecuGen)', 'Face (Suprema)', and 'Face (SecuGen)'. The 'Date started with company' field is set to '24/01/2007'. The 'Employment status' is set to 'Employee'. The 'Absence entitlement policy' is set to 'Production Employee'. The 'Period schedule' is set to '06:00:14:00:22:00:06:00'. The 'Access group' is set to '123Key'. The 'Terminal policy' is set to 'Holiday's Finalised'. The 'Email policy' is set to 'Holiday's Finalised'. The 'Remuneration policy' is set to 'Grade5'. The 'Cost centre (default)' is set to '123456'. The 'Flexitime closing balance set on' is set to '7/7' and 'Amount' is set to '0'. The 'Update' and 'Cancel' buttons are visible at the bottom.

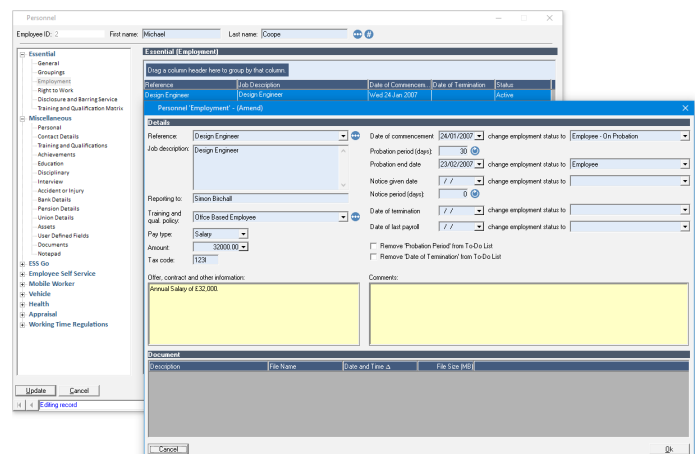
2.4 How to add and edit groupings



2.5 Key Fields within Personnel and their meanings



2.6 How to add an employment record



2.7 How to set an employee as a leaver

The screenshot shows the Personnel form for Michael Coope. The 'Essential' tab is active, and the 'Employment status' dropdown is set to 'Leaver'. Other fields include: Badge format: 26 bit - NMD3; Facility code: 0; Badge: 123456; Payroll: W44356; Integration ID: [blank]; Known as: Coope, Michael; Work email address: mikcoope2014@hotmail.com; Security pin: [blank]; Biometric data: Finger (Suprema) [Remove], Face (Suprema) [Remove], Finger (SecuGen) [Remove], Other [Remove]; Date started with company: 24/01/2007; Badge activation: [blank]; Employment status: Leaver; Absence entitlement policy: Employee - On Probation; Period schedule: Employee MTC; Access group: Leaver - Agency Leaver; Terminal policy: Leaver - Death in Service; Email policy: Holiday's Finalised; Remuneration policy: Grade5; Cost centre (default): [blank]; Flexitime closing balance set on: 7/7; Amount: [blank].

2.8 How to re-enable an employee that has left but is re-joining the company

The screenshot shows the Personnel form for Michael Coope. The 'Essential' tab is active, and the 'Employment status' dropdown is set to 'Employee'. Other fields are identical to the previous screenshot, but the 'Terminal policy' is now 'Leaver - Agency Leaver' and the 'Access group' is 'Employee MTC'.

2.9 How to complete forms within Personnel

The screenshot shows the Personnel form for Michael Coope with the 'Miscellaneous (Training and Qualifications)' sub-form open. The sub-form has a table with columns: Reference, Course title, Course Start Date, Period, Certificate, Entry Date. The table contains one row: Reference: COSHH awareness, Course title: COSHH awareness, Course Start Date: Mon 31 Jul 2017 00:00, Period: [blank], Certificate: [blank], Entry Date: [blank]. Below the table, there are fields for: Start date: Thu 24 Oct 2019 00:00, Completion date: Thu 24 Oct 2019 00:00, Provider, Address, Postcode, #1 Contact, Telephone no., #2 Contact, Telephone no., Fax no., Email address, Web address, Cost of course, Additional costs, Description of award/course, Date of attendance, Equipment needed, Qualifications and experience gained, Participants feedback on course, Result notes, Passed course, Certificate issued, Entry date: Mon 24 Oct 2022 00:00, Remove from To-Do List.

2.10 Employment Statuses and their meaning

Employment Status

Description:

A back colour can be assigned to a status, which is used to highlight an employee when using the find feature.

Status Options

- Working notice
- Exclude from working time regulations, payroll export, attendance display panel and planner
- Exclude from to-do list
- Exclude from devices(s) and calculation
- Exclude from ESS Go
- Employment record date of commencement required
- Employment record probation end date required
- Employment record notice given date required
- Employment record date of termination required
- Employment record date of last payroll required

Editing record

2.11 How to add a document to an employee record

Personnel

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

Miscellaneous (Documents)

Category	Description	File Name	Date	Authorization
General	TEST	Marathon Daily.txt	Tue 20 Dec 2022	Awaiting decision and not yet finalised

Personnel Document - (New)

Category:

Description:

File Name:

File Size:

Date Added:

Authorized by:

Authorization status: Awaiting decision Approved Declined

Editing record

2.12 How to configure ESS Go for an employee

Personnel

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

ESS Go (Account)

ESS Go policy:

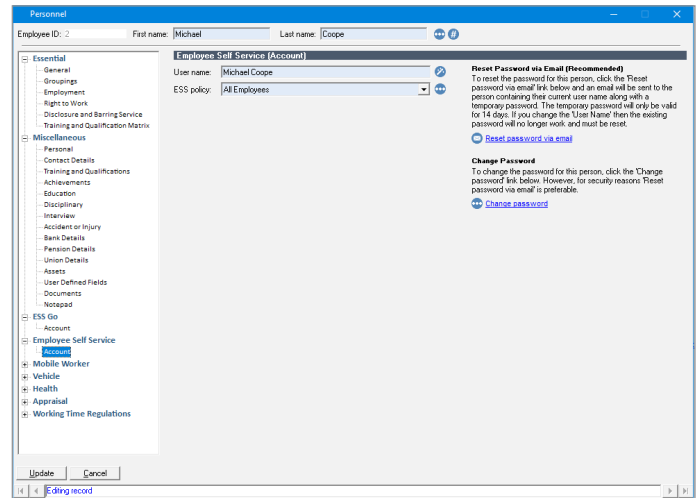
Work email:

Mobile number:

Note: A work email and mobile number must be set to allow the employee to verify their ESS Go account.

Editing record

2.13 How to configure ESS (iis version) for an employee



Test 1

Please create the following personnel record:

We have a new starter (Steven Smith) (date of birth 22/02/1994) starting on the 27th March.

He will be based at the Manchester site and is a HR assistant, part of the HR team.

He will be on a 6 month probation. Hes entitled to 25 days holiday a year, and his working hours are 08:00 - 16:30.

I want him to receive notifications for when his holiday requests have been approved (he will be using the ESS GO).

His Address is 3 Fieldhouse Road, Rochdale, OL12 0AD.

His mother is his next of kin, her details are – Kathleen Smith, 01706 658222.

I also have his A Level result and want to store them in timeware[®].

He attended college between 1st Jan 2010 and 12th August 2014.

He received the following results

A* Maths

A English

B English Literature

C Science

Test 2

Please complete the following:

The new starter also has a health and safety qualification. He passed the course 1st February 2023 - 3rd February 2023 and it's valid for 5 years.

Attach a pdf or image of the certificate to the record.