

Integration Point

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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<sup>®</sup> 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<sup>®</sup> 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.



Personnel							– 🗆 🗙	
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# Adding a new employee

1. To access the 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.

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

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Miscellaneous	Integration ID:			
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Pension Details	Date started with			
Union Details	company:	24/01/2007 - 13 years, 9 month(s)	j. 2 day(s) 📃 Remove "Years Service" fro	ım To-Do List
Assets	Badge activation:	▼ : to	•	
Documents	Englaument status	Employee	- Current employme	nt Design Engineer
Notepad	Absense entitlement	Employee		
Employee Self Service	policy:	20 Days Holiday	<u> </u>	
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Add Edit Dele	e <u>F</u> ind	Refresh Preview Copy	Close	
A Becord 2 of 91			al	
• • • • • • • • • • •				



## **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

- Essential	Essential (Gener	ral)		
Secrital     General     General	Badge format: Badge format: Facility code: Badge: Payrol: Integration ID: GPS IME! Known as: Email address: Security pin: Biometric data: Date started with company: Badge activation: Employment status: Absence entitlement policy. Period schedule: Termind policy: Remuneration polics; Cost centre (default)	Coope.Michael     Coope.Michael     Coope.Michael     Verbbig@edurgonder.co.uk     Friger (Suprema)     Proger (Suprema)     Proge	Eace (Suprem Control of the Control	To detert a photo use rig moure det. on help funder the control of

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.

Personnel				– 🗆 X
Employee ID: First name:	Michael	Last name: Cooper	•	
Essential     General     General     General     General     General     General     General     Support     Support     Support     Support     Support     Support     Context Details     Training and Qualification     Achievements     Achievements     Action     Disciplinary     Interview     Accident or Injury     Bank Octails     Union Details     Union Details     User Defined Fields     Documents     Notepad     Support     Support     Support     Support     Support     Notepad     Support     Notepad     Mobile Worker     Working Time Regulations	Essential (Grou The fields below an Company: Department: Section: Pay Type: Line Manager: Grouping 08: Grouping 08: Grouping 08: Grouping 09: Grouping 10:	pings) e used for grouping employees together. This is mainly for r Fabrication Engineering	epoting purposes and enquiries.	
Update Cancel				
Adding new record				P PI

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

Employee ID: Fist new Michael Last name Cooper Of American Structure Structu	Personnel				- 0
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Programs	General	Drag a column head	er here to group by that column		
Right to Work       Discloury and Simulatoria       Prevail         Prevail       Prevail       Prevail         - Contract Details       - Contract Details       - Contract Details         - Disciplinary       - Interview       - Achievements         - Dusciplinary       - Interview       - Achievements         - Disciplinary       - Interview       - Achievements         - Persion Details       - Disciplinary       - Interview         - Notegad       - Disciplinary       - Interview         - Notegad       - Disciplinary       - Interview         - Notegad       - Disciplinary       - Interview         - Notegad<	Employment	Diag a columnicad	ci nore to gloop by that column.		
	Right to Work	Reference	Job Description	Date of CommencemDate of	Termination Status
	Disclosure and Barring Se	rvice			
<ul> <li>Miscellaneous</li> <li>→ Personal</li> <li>→ Ortact Details</li> <li>→ Training and Qualifications</li> <li>→ Achievements</li> <li>→ Education</li> <li>→ Disciplinary</li> <li>→ Interview</li> <li>→ Actieve or Injury</li> <li>→ Achieve or Injury</li> <li>→ Bank Details</li> <li>→ Oscion Details</li> <li>→ Oscion Details</li> <li>→ Oscoments</li> <li>→ Noteped</li> <li>♥ Vehicle</li> <li>♥ Health</li> <li>☆ Appraisal</li> <li>♥ Working Time Regulations</li> </ul>	Training and Qualification	Matrix			
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5. Right click and press <New>

Personnel					
Employee ID: First name	: Michael	Last name: Cooper	• •		
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Update Cancel					

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.

Personnel Employee ID: First name	- 🗆 X
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# 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			– 🗆 X
Employee ID: 1 First name:	Dave	Last name: Webb 🚥 (#)	
- Essential	Essential (Generation	)	
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- Miscellaneous	Integration ID:		
Personal	GPS IMEI:		The state
Contact Details			
Achievements	Known as:	webb, Dave	
Education	Email address:	dave.webb@timeware.co.uk 💿	
Disciplinary	Security pin:		
Interview	Biometric data:	K Finger (Suprema) 🕕 Remove 🛛 K Face (Suprema) 🕕 Remove 🛛 Finge	r Registration Wizard (Suprema) 💀
		K Finger (SecuGen) 1 Remove X Other Remove Finge	r Registration Wizard (SecuGen)
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Union Details	Date started with company:	31/10/2009 💌 🛛 10 years, 11 month(s), 25 day(s) 🛛 🗖 Remove "Years Service" from To-Do	List
Assets	Badge activation:	• : to • :	
Decuments			
Notepad	Employment status:	Employee 🔽 🐨 Current employment: Super	visor
Employee Self Service	Absence entitlement policy:	20 Days Holiday 🔽 🐨 💿	
Mobile Worker	Period schedule:	06:00-14:00\14:00-22:00\22:00-06:00	<b>•</b>
Vehicle			
	Terminal policy:	All Terminals 📃 🐨	
Appraisal	Email policy:	Not Required 🔹 💌	
Working Time Regulations	Remuneration policy:	Not Required	
	Lost centre (default):	<b>_</b>	
	Flexitime closing bala	ce set on: 📝 / 🖳 Amount:	
<u>A</u> dd <u>E</u> dit <u>D</u> elete	Eind	efresh <u>P</u> review Copy <u>C</u> lose	
Record 1 of 91			•

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

Find: Perso	onnel				—	□ ×
Search for: Search through: Search type:	Employee ID Contains	•	•	00	0	
Drag a column I	neader here to group b	y that column.				^
Employee ID $\Delta$	Payroll	First Name		Last Name	Known As	Emplo
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	2 2	Michael		Сооре	Coope,Michael	Emplo
	33	Simon		Birchall	Birchall,Simon	Emplo
	4 4	Matt		Wilkinson	Wilkinson,Matt	Emplo
	55	Liz		Broadhurst	Broadhurst,Liz	Emplo
	66	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	Emplo Y

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



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

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Essential	Essential (Gener	al)		
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Disclosure and Barring Service	bauge.			
Training and Qualification Matrix	Payroll:	2		
Miscellaneous	Integration ID:			
Personal	GPS IMEI:			
Contact Details	Known per	Coope Mishael		
Achievements	KHOWH ds.			
Education	Email address:	webbdj@blueyonder.co.uk	•	
Disciplinary	Security pin:			
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Pension Details				
Union Details	Date started with company:	24/01/2007 💌 13 years, 9 month	s), 2 day(s) 👘 🔲 Remove 'Years Service'	from To-Do List
Assets	Badge activation:	<b>• 1</b>	<b>-</b>	
User Defined Fields				
Notepad	Employment status:	Employee	💌 🤍 Current employ	ment: Design Engineer
Employee Self Service	Absence entitlement	20 Days Holiday	0 0	
Mobile Worker	Period schedule:	06-00-14-00\14-00-22-00\22-00-06-00	Veek rot	ation: 3
Vehicle	r chod schodule.	100.00 14.00 14.00 22.00 022.00 00.00		
Health	Terminal policy:	Office Access Mon to Fri Only	<u> </u>	
Appraisal	Email policy:	Not Required		
Working Time Regulations	D			
	Remuneration policy:	jinot Required	•	
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		Tellesh		



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

- Essential	Essential (General)	
<ul> <li>⇒ General</li> <li>⇒ General</li> <li>⇒ Groupings</li> <li>⇒ Enployment</li> <li>⇒ Biptro Work</li> <li>⇒ Miscellaneous</li> <li>⇒ Miscellaneous</li> <li>⇒ Forsonal</li> <li>⇒ Contact Details</li> <li>⇒ Taining and Qualification</li> <li>⇒ Achievements</li> <li>⇒ Achievements</li> <li>⇒ Achievements</li> <li>⇒ Achievements</li> <li>⇒ Achievements</li> <li>⇒ Achievements</li> <li>⇒ Mobile Vorker</li> <li>⇒ User Defined Fields</li> <li>&gt; Documents</li> <li>⇒ Mobile Worker</li> <li>⇒ Health</li> <li>⇒ Appliane</li> <li>⇒ Working Time Regulations</li> </ul>	addge format:       25 bit - NMD3         addige format:       26 bit - NMD3         addige:       0         addge:       0         addge:       0         addge:       0         addige:       0         addge:       0         addge:       0         addge:       0         addge:       0         addge:       0         addge:       0         payoll:       2         payoll:       2         imal address:       Coope Michael         imal address:       Finger (Suprema)       Remove         imal address:       Finger (Suprema)       Remove         Vale statted with company:       24/01/2007       13 years, 9 month(s).2 day(s)         Vale statted with company:       20 Days Holday       10 Cur         balays:       Employee       10 Cur         vale:       06/00.14.00/14.00.22.00.22.00.06.00       10 Cur         vale:       06/00.40.00/14.00.22.00.02.00.06.00       10 2 0 0 0 0 0         reminal policy:       01/fice Access Mon to Fil Only       10 0 0 0         reminal policy:       01/fice Access Mon to Fil Only       10 0         reminal policy: <th>Remove Remove Remove Remove Remove Remove Remove Resolution Registration Wizard (Sup Registration Wizard (Sup Registratio</th>	Remove Remove Remove Remove Remove Remove Remove Resolution Registration Wizard (Sup Registration Wizard (Sup Registratio

### Click <Close> to leave Personnel.

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nployee ID: 2 First nam	e: Michael	Last name: Coope	• • •		
Essential	Essential (Gener	al)			
General	Badge format:	26 bit - NMD3	<b>•</b>		To select a photo use ri
Groupings	Eacility code:	0			mouse click on the b
Employment Pight to Work	Padae:				
- Disclosure and Barring Service	bauge.				
Training and Qualification Matrix	Payroll:	2			
- Miscellaneous	Integration ID:				
Personal	GPS IMEI:				
Contact Details	~				
- Iraining and Qualincations	Known as:	Loope,Michael			
Education	Email address:	webbdj@blueyonder.co.uk		9	
Disciplinary	Security pin:				
Interview	Biometric data:	Einger (Suprema) 🕕 Remove	X Eace (Suprema)	Remove	Finger Registration Wizard (Suprema)
Accident or Injury		X Finger (SecuSen)	A littler	Remove	Finger Registration Wizard (SecuGen)
Pension Details					
Union Details	Date started with company:	24/01/2007 - 13 years, 9 month(	s), 2 day(s) 📃 Remo	ove "Years Service' from	To-Do List
Assets	Badge activation:	<b></b> to	-		
User Defined Fields	badge dearanon.				
Notepad	Employment status:	Employee	<u> </u>	Current employment:	Design Engineer
Employee Self Service	Absence entitlement	20 Days Holiday			
Mobile Worker	Period schedule:	00.14-00.14-00.22-00.22-00.00-00	- 6		2 -
- Vehicle	r endu schedule.	00.0014.0014.00-22.00122.00-00.00		week lotation.	13 1
- Health	Terminal policy:	Office Access Mon to Fri Only	- •	•	
- Appraisal	Email policy:	Not Required	-	•	
Working Time Regulations					
	Hemuneration policy:	Not Required		<b>2</b>	
	Cost centre (default):		(	•	
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	I ma I	Defects I Deview Com	Church		
		nerresrireviewCopy			
<ul> <li>Record 2 of 91</li> </ul>					•



# 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.



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	e: Dave	Last name: Webb	•••		
Essential	Essential (Gener	al)			
General	Badge format:	26 bit - NMD3	•		To select a photo use rig
Groupings	Facility code:	0			mouse click of the bo
	Badge:				
Disclosure and Barring Service	baago.				1 and
Training and Qualification Matrix	Payroll:	1			2 AN
Miscellaneous	Integration ID:				
Personal Contact Datails	GPS IMEI:				
Training and Qualifications	Known as:	Webb, Dave			
Achievements	Empil address:	dave webb@timeware ee.uk			
Education	Email address.	Juave.webb.gotimeware.co.uk	•		
Disciplinary	Security pin:				
-Accident or Injury	Biometric data:	🔀 Finger (Suprema) 🕕 <u>Remove</u>	🔀 🛛 Face (Suprema) 🛛 🚺	Remove	Finger Registration Wizard (Suprema) 🔇
Bank Details		🗙 Finger (SecuGen) 🕕 <u>Remove</u>	🗙 Other	Remove	Finger Registration Wizard (SecuGen) 🤇
Pension Details	Date started with	21 /10 /2020 - 10 // 20 / 11 // ()	25 July 1		- De List
	company:	31/10/2009 - 10 years, 11 month(s),	, 25 day(s) E Hemove Y	ears Service' from 1	
- User Defined Fields	Badge activation:	▼ : to			
Documents	Employment status:	Employee	- 🖸 🖸	urrent employment: S	iupervisor
Notepad	Absence entitlement	20 Dave Unitian			
Employee Self Service	policy:	20 Days Holiday	• • •	,	
H Vehicle	Period schedule:	06:00-14:00\14:00-22:00\22:00-06:00	<u> </u>	Week rotation:	1 -
Health	Terminal policy:	All Terminals			
+ Appraisal		his Basis			
Working Time Regulations	Email policy:	INOTREQUIRED	<b>_</b>		
	Remuneration policy:	Not Required			
	Cost centre (default):				
	Flexitime closing bala	nce set on: 17 💌 Amount:			
Add <u>E</u> dit <u>P</u> elete	<u>F</u> ind	Refresh Preview Copy	Close		
I ▲ Record 1 of 91					

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

Find: Personn	el					×
Search for: Search through: Er Search type: Co	nployee ID ontains	<b>•</b>	00	0		
Drag a column hea	der here to group by I	hat column.				^
Employee ID $\Delta$	Payroll	First Name	Last Name	Known As	Employment Sta	1
1	1	Dave	Webb	Webb,Dave	Employee	1
2	2	Michael	Сооре	Coope,Michael	Employee	- 1
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	
• •	10	<b>T</b> 1	0.1	014 P	•	·



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

- Essential	Essential (Gener	al)		
General	Badge format:	26 bit - NMD3		To select a photo use rij
Groupings	Eastly and a			mouse click on the b
Employment	Facility code:			
Right to Work	Badge:			
Training and Qualification Matrix	Payroll:	2		
- Miscellaneous	Integration ID:			
Personal	CDC INFL			
···· Contact Details	GFS IMEI:			
Training and Qualifications	Known as:	Coope,Michael		
Education	Email address:	webbdj@blueyonder.co.uk	©	
Disciplinary	Security pin:			
Interview	P: 12 10			
Accident or Injury	Biometric data:	Finger (Suprema)	Face (Suprema)	Finger Registration Wizard (Suprema)
Bank Details		Finger (Seculien) U Remove	Uther <u>Remove</u>	Finger Registration Wizard (SecuGen)
Union Details	Date started with	24/01/2007 13 years 9 month(s) 2 day	(s) Bemove 'Years Service' fr	am Ta-Da List
Assets	company:			
···· User Defined Fields	Badge activation:	: to	- :	
Documents	Employment status:	Employee	💌 😳 Current employme	ent: Design Engineer
Notepad	Absence entitlement	20 Dave Holiday		
Employee Self Service	policy:	20 Days Holiday		
	Period schedule:	06:00-14:00\14:00-22:00\22:00-06:00	💌 😳 🖉 🛛 Week rotati	on: 3 💌
Health	Terminal policy:	Office Access Mon to Fri Only		
Appraisal				
Working Time Regulations	Email policy:	Not Required	<u> </u>	
	Remuneration policy:	Not Required		
	Cost costs (defeat)			
	Lost centre (derauit):	]		
	Flexitime closing bala	nce set on: 77 💌 Amount:		
		,		
Add Edit Delete	Find	Refresh Preview Copu	Close	

**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	<u> </u>	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 777 _ change employment status to	•
Benorting to:	, 		Notice period (deys):	
Training and	,		Date of termination 18/12/2020 - change employment status to Leaver	•
qual. policy:	]	<u> </u>	Date of last name	-
Pay type:	•			
Amount:	<b></b>		Remove 'Probation Period' from To-Do List	
Tax code:			Hemove 'Date of Termination' from To-Do List	
Dífer, contract a	and other information:		Comments:	
Description		Gila Nama Data	a med Time A Ella Sina (MB)	
Description				
Cancel				
Carica				`
lick /	745			



Then click <Update>.



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