
TRAINING GUIDE

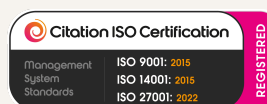
Level 1 Dashboard

What the Workforce dashboard shows each user, how to work, snooze and restore alerts, and how to read, arrange and drill into widgets in timeware® HRMS.

PRODUCT	REFERENCE	VERSION
timeware® HRMS	t2-1015	v1.0

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Certificate No: IMS-491342025,
509932026



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What this covers

This guide covers the everyday use of the dashboard in the web version of timeware HRMS. The page is called the **Workforce dashboard**. It is the first page people see after signing in. By the end you will be able to:

- explain what appears on the dashboard and why each person sees something different
- read **Your alerts** and open the list behind an alert
- snooze, dismiss or mute an alert, and bring it back from **Manage alerts**
- add, arrange, filter and remove the chart and figure cards, called widgets
- open a drilldown from a widget to see the people or records behind a figure
- explain, in outline, how a dashboard policy decides what a user can see.

Why it matters

Managers and HR teams start their day wanting to know what needs doing: leave to authorise, timesheets to process, new starters to onboard, licences about to run out. The dashboard gathers these into one list, most urgent first, so nobody has to open each page to check. Next to that list sit charts and figures, such as absence rate or headcount, that each person chooses for themselves.

Support calls about the dashboard are usually “I can’t see something” or “why am I seeing this?”. The answer is almost always the user’s dashboard policy, their permissions, or their own snooze and dismiss choices. This guide shows you how to tell which.

Key terms

TERM	WHAT IT MEANS
Workforce dashboard	The dashboard page, in the Home column of the main menu and in the sidebar. It is the only dashboard in the web version.
Widget	One source of information on the dashboard. There are two kinds: alerts and analytics.
Alert	A widget that shows as one row in Your alerts when something needs attention, for example 5 leave requests to authorise . When there is nothing to do, its row disappears.
Analytics widget	A card of headline figures and charts, such as Absence rate or Workforce overview . Each user picks which ones appear on their own dashboard.
Your alerts	The list of alert rows, on the left of the dashboard. Rows are grouped into Needs action , Review and For info .
Overdue	An alert past its time limit, for example leave waiting more than three days for a decision.
Snooze	Hide an alert from your own list for a set time. It then comes back by itself.
Dismiss	Hide an alert as it is now. It comes back when the alert changes.
Mute	Stop that kind of alert showing for you, until you unmute it. The menu option is Don't show again .
Drilldown	A window that opens from an alert or a widget and lists the people or records behind it, for example every leave request waiting for a decision.
Workforce filter	The Workforce button at the top of the page. It narrows the dashboard to a group of people, and the same choice applies on other workforce pages.
Dashboard policy	A list of widgets an administrator sets up and gives to users. It decides which alerts can appear for a user and which analytics widgets they can add.
Application policy	A set of permissions given to users, sometimes called a role. A widget only shows data it lets the user read.

Table 1 — Key terms

What permissions are required

The dashboard page itself needs no permission: every web user can open it. What appears on it depends on two things set by the customer's administrator. The first is the **Dashboard policy** on the user's record, which lists the widgets they can have. The second is their application policy, which must let them read the data each widget uses. Row names below are as they appear in **Configuration > Advanced > Application policies**.

THE USER WANTS TO...	APPLICATION POLICIES ROW	SWITCH
Open the dashboard	None	None
See any alerts or widgets at all	A Dashboard policy chosen on their record in Configuration > Advanced > Users	Not a switch
See leave alerts and leave charts	Leave > Leave planner	Read
See timesheet and clocking alerts and charts	Time > Timesheets	Read
See Labour cost	Time > Timesheets and its View cost row	Read
See Device health	Time > Configuration > Devices	Read
See fire drill and evacuation widgets	Time > Evacuations	Read
See people alerts, such as New starters	People > Person and People > Person > Employment and compensation > Employment	Read
See Upcoming birthdays	People > Person and People > Person > Core > Personal	Read

Table 2 — Access needed to see alerts and widgets

Every widget also follows the Employee Filter on the user's application policy. A site manager whose filter covers one site only sees alerts and figures for that site.

THE USER WANTS TO...	APPLICATION POLICIES ROW	SWITCH
Snooze, dismiss or mute an alert	None. The widget decides, and a dashboard policy can switch an option off	None
Act on a record from a drilldown, for example approve leave	The row for that record, for example Leave > Leave planner	Update
Change which dashboard policy a user has	Advanced > Users	Update
View, add, change or delete dashboard policies	Advanced > Configuration > Dashboard policies	Read, Create, Update, Delete

Table 3 — Access needed to act and to manage dashboard policies

NOTE

After an administrator changes an application policy or a user's dashboard policy, the user should click **Log out** and sign back in. Until they do, their menus and dashboard can still reflect the old settings.

USING THE DASHBOARD

How it works: the Dashboard

The dashboard has two parts. **Your alerts** is a to-do list the product builds for you from your dashboard policy. The widget area beside it is yours to arrange, with the charts and figures you choose. On a wide screen the alerts sit on the left and the widgets on the right. On a narrower screen the alerts sit above the widgets.

Along the top of the page you see the heading **Workforce dashboard** with a **Live** marker, the **Workforce** filter button, and three buttons: **Manage alerts** (with a count), **Edit layout** and **+ Add widget**.

Live means changes arrive by themselves. When someone authorises leave, for example, the alert counts update within a few seconds without a refresh. If the connection drops, the marker changes to **Reconnecting** or **Not live**.

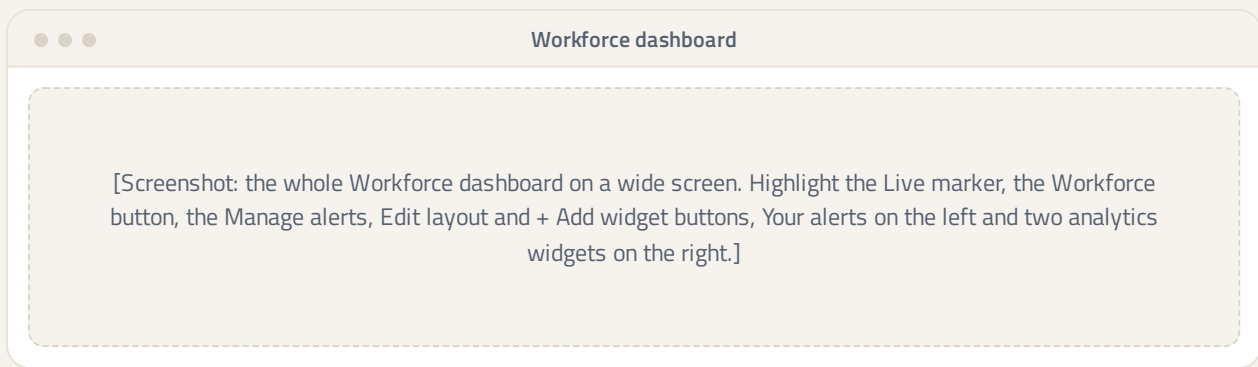


Figure 1 — The Workforce dashboard

Reading Your alerts

The heading shows the counts on the same line, for example **Your alerts · 11 pending · 3 overdue**. When there is nothing to do it reads **Your alerts · Nothing needs attention**. Under the heading, **Why these items?** opens a short card headed **Set by your admin**, which explains that the admin sets the rules and that snoozing only changes your own list.

Rows are grouped into bands, most urgent first. Empty bands are left out.

BAND	WHAT THE ROWS ASK FOR
Needs action	Something is waiting on you, such as 5 leave requests to authorise or 12 timesheets to process . Red dot.
Review	Something to look over, such as licences or checks coming due. Amber dot.
For info	Good to know, such as 4 upcoming birthdays or leave starting soon. Grey dot.
Snoozed	Rows you have snoozed, faded, at the bottom of the list.

Table 4 — The bands in Your alerts

Each row has:

- A coloured chip for the area it comes from: **People**, **Leave**, **Time** or **Home**.
- A title that starts with the count in bold, for example **3 timesheets to process**.
- A detail line. The urgent fact comes first, in red, such as **2 overdue**. The rest is grey, such as the oldest item or the next due date.
- A button that says what to do, such as **Review**, **Authorise**, **Onboard**, **Celebrate**, **View** or **Open the board**.

- A **snooze button** (a stopwatch with a “z”), on alerts that can be snoozed.

The two buttons appear when you point at a row, or when you click the row. On a touch screen, tap the row first. Overdue rows have a tinted background and a solid button, so they stand out.

Under the list, a footer shows **Pending**, **Snoozed**, **Dismissed** and **Muted** with a count each. Clicking **Snoozed**, **Dismissed** or **Muted** opens **Manage alerts** on that tab.

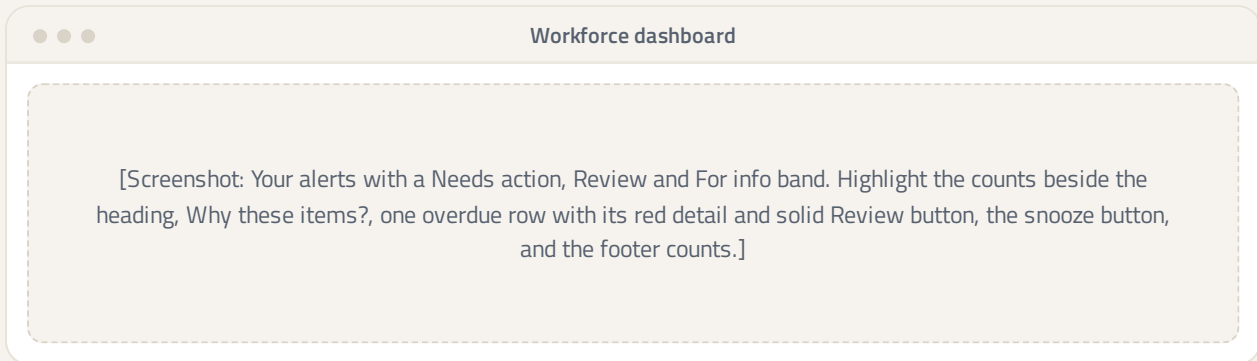


Figure 2 — Your alerts, grouped by band

Walkthrough: work an alert

This example uses **Leave awaiting authorisation**. Other alerts work the same way: the button opens either a drilldown window or the page where the work is done.

1 Find the row

In **Needs action**, find **5 leave requests to authorise**.

You see: a **Leave** chip and a detail line such as **2 overdue · oldest 6 days**.

2 Point at the row and click Review

Move the mouse over the row, then click **Review**.

You see: a window headed **Leave awaiting authorisation**. At the top, a line reads **Only the people in your workforce filter are shown**.

3 Choose a list

Click **All**, **Awaiting decision** or **Awaiting finalisation**. Each shows its count.

4 Find a request

Type a name in the **Search** box, or use the page buttons.

You see: the list narrows, and a count such as **2 matching**.

5 Open the booking

Click **Open booking** on the row.

You see: the leave booking opens on top of the list, where it can be approved or declined as usual.

6 Close the window

Click **Close**.

You see: the dashboard again. The row's count goes down, or the row disappears when nothing is left.

Users with Update on **Leave > Leave planner** can also tick several requests and click **Approve** in the window. The Leave Management guide covers approving leave.



Figure 3 — A drilldown opened from an alert

Walkthrough: snooze, dismiss or mute an alert

These actions tidy your own list only. Nobody else's list changes, and nothing happens to the leave, timesheets or records behind the alert.

1 Open the snooze menu

Point at the row and click the snooze button (the stopwatch).

You see: a menu with **Snooze** and three choices: **For 1 hour**, **Until tomorrow** and **For a week**. Below them, if the alert allows it, **Dismiss this** and **Don't show again**.

2 To snooze, pick a time

Click **For 1 hour**, **Until tomorrow** or **For a week**.

You see: the row moves to the **Snoozed** band, faded, with a line such as **Snoozed · 8 hours left**. When the time is up, it moves back by itself.

3 Or dismiss it

Click **Dismiss this**.

You see: the row disappears and the **Dismissed** count in the footer goes up by one. It comes back when the alert changes, for example when a new request joins the list or next month's birthdays begin.

4 Or mute it

Click **Don't show again**.

You see: the row disappears and the **Muted** count goes up. It stays hidden until you unmute it.

5 To end a snooze early

Point at the snoozed row, click its snooze button, then click **Resume**.

Not every alert offers every choice. Alerts about compliance and approvals, such as **Leave awaiting authorisation**, **Timesheet review** and **Evacuation in progress**, have no snooze button at all. Many others can be snoozed and dismissed but not muted, so a recurring check is never silenced for good.

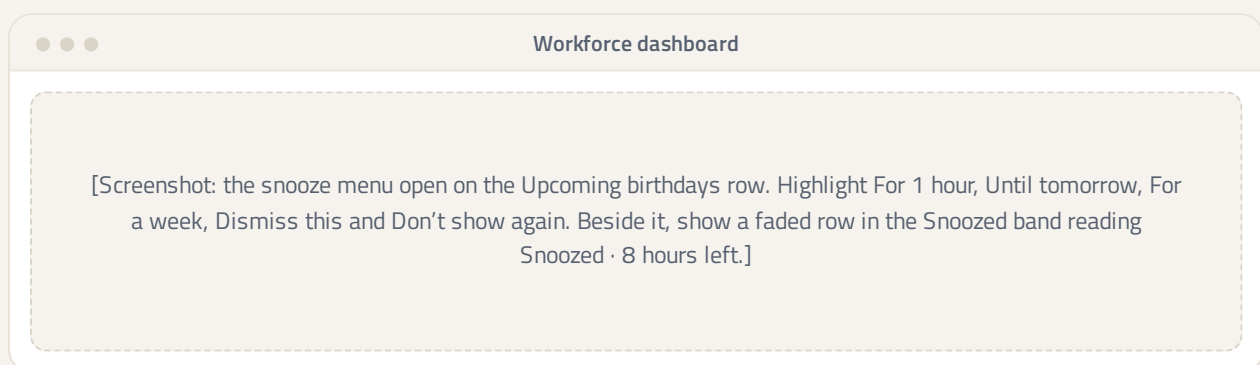


Figure 4 — The snooze menu and a snoozed row

Walkthrough: bring an alert back

1 Open Manage alerts

Click **Manage alerts** at the top of the page. The number beside it is how many alerts you have snoozed, dismissed or muted.

You see: a panel headed **Bring back alerts you snoozed, dismissed or muted**, with **Snoozed**, **Dismissed** and **Muted** tabs.

2 Pick a tab

Click the tab you need.

You see: each alert listed by its widget name, such as **Upcoming birthdays**. Snoozed alerts show the time left. Dismissed and muted ones show **Dismissed on** or **Muted on** with the date. An empty tab says, for example, **No muted alerts yet**.

3 Bring one back

Click **Resume**, **Restore** or **Unmute** on its row.

You see: it leaves the panel and, if it still has something to show, returns to **Your alerts**.

4 Or bring them all back

Click **Resume all**, **Restore all** or **Unmute all** under the list.

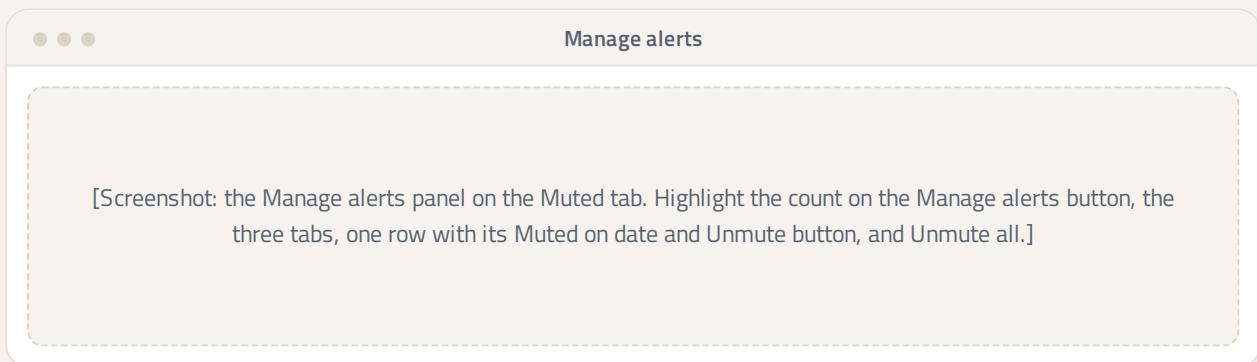


Figure 5 — Manage alerts

Reading an analytics widget

Each widget card has its name and a one-line description at the top. The body can hold headline figures, charts and, on some widgets, tabs such as **Gender** and **Age**. Along the top right you may see:

- **Updated.** A grey tag such as **Updated 3 minutes ago**. It turns amber after two minutes. Point at it to see the exact time.
- **Export to Excel and Copy data.** Shown when the widget has figures or charts. Export downloads an Excel file named after the widget. Copy shows **Copied to clipboard**.
- **Refresh.** Reloads the widget and shows **Widget refreshed**.
- **Filter.** Opens the widget's own settings, where they exist. After you click **Apply**, the filter button turns amber to show your own settings are in use, and a clear button appears beside it. Clicking the clear button shows **Filter cleared**. A widget with nothing to set says **This widget has no configurable filters**.

Many widgets have a date range under the heading: **30 days**, **90 days**, **12 months** or **This year**. Your choice is saved for you. With nothing to show, the card says **No data for this period**.

Some widgets have a button at the bottom that opens a drilldown, such as **See who was absent** on **Absence rate**, or **See who is off sick most** on **Sickness patterns**.

Walkthrough: add, arrange and remove widgets

1 Open the widget list

Click **+ Add widget**. On an empty dashboard you can also use the **Add widget** button under **Your dashboard is ready to customise**.

You see: **Add a widget**, listing each widget you can have with an area chip, its name and description. Widgets already on your dashboard show **Added** and a **Remove** option.

2 Add one

Click a widget, for example **Absence rate**.

You see: the card appears on your dashboard and the row in the list changes to **Added**.

3 Start arranging

Close the list, then click **Edit layout**.

You see: the button now reads **Done**, the rest of the page dims, and each card shows a bin button in its corner.

4 Move or resize a card

Drag a card to a new place, or drag its edge to make it bigger or smaller.

5 Remove a card

Click the bin button on the card. You can also click **Remove** beside it in **+ Add widget**.

6 Finish

Click **Done**. Your layout is saved for you as you go. Nobody else's dashboard changes.

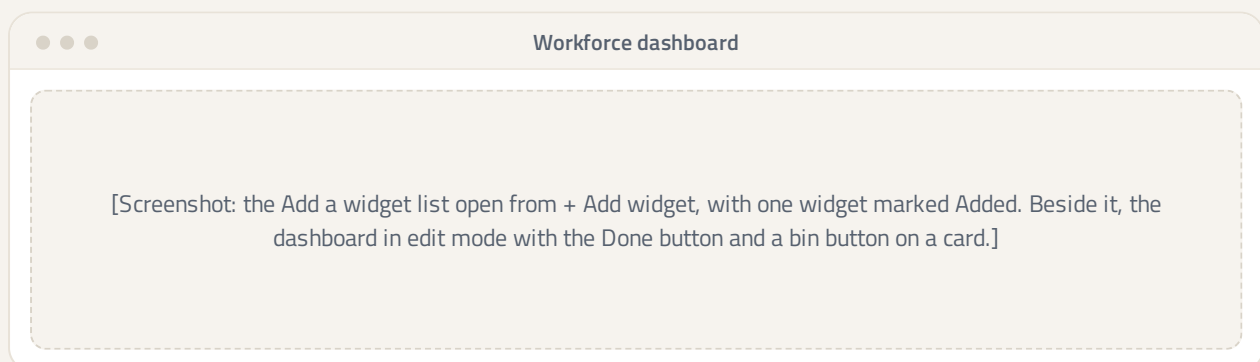


Figure 6 — Adding and arranging widgets

Walkthrough: open a drilldown from a widget

1 Find the widget

Find **Absence rate** on your dashboard. Add it first if you need to.

2 Open the drilldown

Click **See who was absent** at the bottom of the card.

You see: a window headed **Absence by employee**, with the people who had the most days off first, their **Days lost** and **Absences**, and a total such as **42 days lost in total** to check against the card.

3 Search or page through

Use the **Search** box or the page buttons. Each change reloads the list.

4 Close it

Click **Close**.

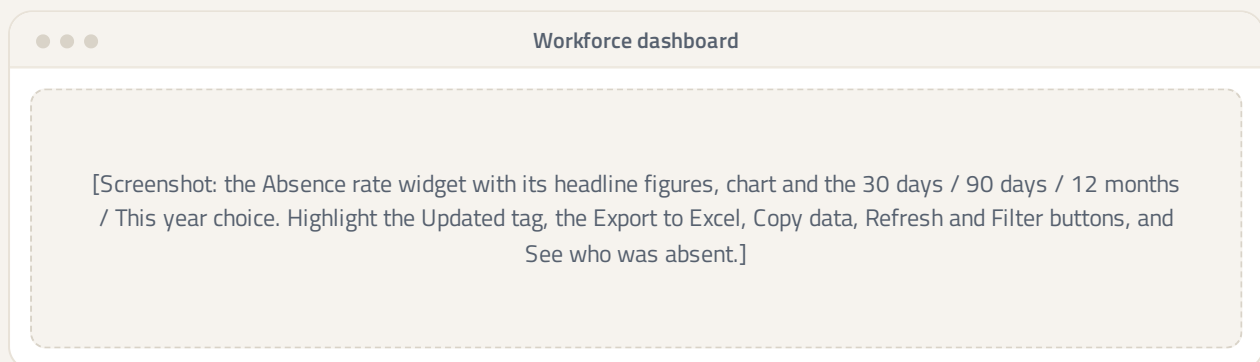


Figure 7 — An analytics widget and its drilldown button

Narrowing the dashboard with Workforce

The **Workforce** button at the top of the page shows the current choice and a count, for example **Workforce ▾ Unfiltered ▾ 250 of 250**. Click it to pick a saved filter or a group of people, check the **Live preview** count, and click **Apply**.

The choice applies to every alert count, widget and drilldown on the dashboard. It also carries across to the other workforce pages that show the same button, such as **Workforce leave**, **Roster** and **Roll call**. It can only narrow what the user's application policy already lets them see, never widen it.

How dashboard policies decide what you see

A dashboard policy is a named list of widgets, kept in **Configuration > Advanced > Dashboard policies**. Each user can have one, chosen in the **Dashboard policy** field on their record under

Configuration > Advanced > Users. A new company starts with a policy called **Comprehensive**, which includes every standard widget.

For each user, the product works it out like this:

- **Alerts:** every alert in their dashboard policy is checked on each visit. A row appears only when there is something to show, the user can read that data, and the user has not snoozed, dismissed or muted it.
- **Analytics widgets:** the policy is the list the user can pick from in **+ Add widget**. Only the widgets the user adds appear.
- **Settings:** the policy can set a widget's defaults, such as how many days before leave counts as overdue. A user's own filter settings then apply on top, for that user only.
- **Snooze, dismiss and mute:** under **Operational Alerts**, the policy can set each of **Snooze**, **Dismiss** and **Mute** to **Inherit from widget**, **Allow** or **Disable** for each widget.
- **Email summaries:** the policy can also send users a scheduled email with a summary of chosen widgets, using its **Notify** switch and schedule.

Building and editing a dashboard policy is covered in a later guide. For support calls, the key check is which policy the user has, and whether the widget they expect is on it.

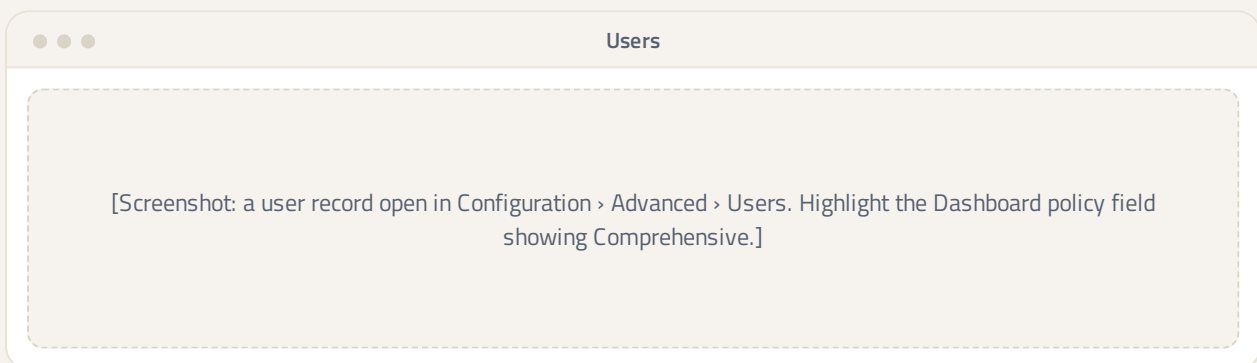


Figure 8 — The Dashboard policy field on a user record

Limits at a glance

WHAT	LIMIT	NOTES
Snooze lengths	1 hour, until tomorrow, 1 week	"Until tomorrow" ends at midnight in the company's time zone
Dismiss	Until the alert changes	A new item, a new week or month, or a different Workforce choice brings it back
Mute	Until unmuted	Undo it in Manage alerts
Dashboard policies per user	One	Chosen on the user record
Refresh	One full reload per 30 seconds	Clicking again sooner shows the latest saved figures
Updated tag	Amber after 2 minutes	A quick sign the figures may be out of date
Rows per drilldown page	25	Use the page buttons or Search for more
Bulk selection in a drilldown	25 rows	One page at a time, where a drilldown offers bulk actions

Table 5 — Limits at a glance

How it connects to other features

- **Users and dashboard policies:** the **Dashboard policy** on a user's record decides which widgets they can have.
- **Application policies:** the rows decide whose and which data each widget shows, and the Employee Filter decides which people.
- **Leave planner, Timesheets and person records:** drilldowns open the same booking, timesheet and record windows those pages use, so work done from the dashboard is the same work.
- **Workforce filter:** the same choice is shared with Workforce leave, Roster and Roll call.

- **Evacuations:** while a fire drill or evacuation is running, **Evacuation in progress** appears in Your alerts, with **Open the board**.
- **Queries:** charts in Queries answers look and export like dashboard widgets.
- **Subscription:** every standard widget is available to every company. Custom widgets appear only when they are listed on the company's Subscription.

Things to be aware of

- **No policy, empty dashboard.** If a user's record has no **Dashboard policy**, they see **Nothing needs attention** and **+ Add widget** says **No more widgets available**. New users are not given a policy automatically. **[Check: what marking a dashboard policy as the default does, since it is not given to new users automatically.]**
- **A new user starts with no analytics widgets.** The widget area says **Your dashboard is ready to customise** until they add some.
- **Everyone sees different figures.** Two users can see different counts for the same alert, because each follows their own permissions, Employee Filter and Workforce choice.
- **Missing permission.** An alert the user cannot read simply never appears. An analytics widget they can add but cannot read shows **An unknown failure has occurred**. in its card. Check the user's application policy against Tables 2 and 3.
- **Alerts disappear when done.** There is no "all clear" row. When the last item is dealt with, the row goes.
- **Heading and footer counts can differ.** The **pending** count beside the heading includes snoozed rows. The **Pending** count in the footer does not.
- **Switched-off options.** The snooze menu shows what the widget itself allows. If a dashboard policy has set an option to **Disable**, the option still shows, and choosing it shows **You do not have sufficient permissions to create this item**. **[Check: whether the menu should hide options a dashboard policy disables, and whether Allow should add options the widget does not offer; today it does neither.]**
- **An empty snooze menu.** A few alerts, such as **Training requests**, **Reported comments** and the shift marketplace and shift exchange alerts, show a snooze button whose menu has no choices, because none are allowed for them. **[Check: whether the snooze button should be hidden on these alerts.]**
- **Dismissals follow the Workforce choice.** An alert dismissed while Workforce was set to one team can reappear when you switch to another team.
- **Changes to a policy tidy the layout.** If an administrator takes a widget off a user's dashboard policy, it disappears from that user's dashboard at their next visit.

- **Web only.** The dashboard is part of the web version. The timeware app for employees does not include it.

Common support questions

“My dashboard is completely empty.”

Open the user in **Configuration > Advanced > Users** and check the **Dashboard policy** field. If it is blank, the administrator should choose one. The user should then log out and back in.

“My colleague has an alert I don’t get.”

Check three things in order: the widget is on the user’s dashboard policy; the user has Read on the matching row in Table 2; and the alert is not on the **Dismissed** or **Muted** tab of their **Manage alerts**. Also check their **Workforce** choice.

“An alert vanished and I didn’t deal with it.”

Look at the footer counts and open **Manage alerts**. It may have been snoozed, dismissed or muted by accident. Click **Resume**, **Restore** or **Unmute**.

“There’s no snooze button on the leave alert.”

That is expected. Approval and compliance alerts, such as **Leave awaiting authorisation**, cannot be snoozed, so they are never hidden by mistake.

“The number on the dashboard doesn’t match the page.”

Check the **Workforce** button first: the dashboard follows it. Then check the **Updated** tag and click Refresh on the widget.

“I can’t find the widget I want in Add widget.”

It is not on the user’s dashboard policy. The administrator can add it in **Configuration > Advanced > Dashboard policies**.

Try it yourself

Use a demo or training company, never a customer's.

1 Read your alerts

Open the **Workforce dashboard**. Note the counts beside **Your alerts** and which bands you have. Click **Why these items?**.

2 Work an alert

Open a **Review** button on any row, look at the list, then click **Close**.

3 Snooze and resume

Snooze **Upcoming birthdays** or **Upcoming leave For 1 hour**. Find it in the **Snoozed** band, then click **Resume**.

4 Mute and unmute

Choose **Don't show again** on the same row. Open **Manage alerts**, go to **Muted** and click **Unmute**.

5 Build your widget area

Add **Absence rate** and **Workforce overview**. Click **Edit layout**, swap their places, then click **Done**.

6 Drill in and narrow down

Set **Absence rate** to **90 days** and click **See who was absent**. Then use **Workforce** to pick one group and watch the figures change. Set it back when you finish.

TIP

Check your understanding. A line manager says the **Upcoming birthdays** alert has gone from her dashboard, but a colleague on the same dashboard policy still has it. Nothing has changed in her permissions. What would you check first?

Answer: her **Manage alerts** panel. She has probably dismissed or muted the alert. Snooze, dismiss and mute only change her own list, which is why her colleague still sees it. Click **Restore** or **Unmute** to bring it back.