

TRAINING GUIDE

Level 1 Conversation Hub

How employees raise a question from the timeware app, and how staff read it, reply, keep track of it and close it in timeware® HRMS.

PRODUCT	REFERENCE	VERSION
timeware® HRMS	t2-1030	v1.0

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What this covers

This guide covers everyday use of the Conversation hub, the page in the web version of timeware HRMS where staff answer questions that employees send from the timeware app. By the end you will be able to:

- explain what conversations are for and what they can be about
- show an employee how to start a conversation, and reply to one, in the app
- find, open and reply to a conversation in the Conversation hub
- use a suggested reply, and open the record a conversation is about
- set the priority, assign a conversation, and resolve, close or reopen it
- explain who can see which conversations, and what access each task needs.

Why it matters

Employees often have a question about something specific: a shift that is missing a clock-out, a timesheet that looks wrong, a leave booking they want to move, or a training course. Without a proper channel those questions arrive by text, phone or a word in the corridor, and they get lost.

A conversation keeps the question, the answers and the record it is about together in one place. The employee asks from the app, the right person in the office answers from the Conversation hub, and everyone can see whose turn it is. Nothing gets forgotten, and there is a written record of what was agreed.

Key terms

TERM	WHAT IT MEANS
Conversation	A written exchange between one employee and the office about one record. It has a subject, messages, a status and a priority.
Conversation hub	The page in the web version where staff see, answer and manage conversations. It is in the Home column of the main menu and in the Quick Links on the left.
The app	The timeware app that employees use on their phone. Employees start conversations and reply to them here, from Conversations on the home screen.
Linked record	The thing the conversation is about: a timesheet shift, a timesheet, a leave booking, a training course, or the employee's own development.
Status	Where the conversation is up to, for example Awaiting manager response or Resolved . It mostly changes by itself when someone replies.
Priority	Low, Normal, High or Urgent . It helps the office sort its work. High and Urgent show a flag. Employees never see it.
Assigned to	The member of staff looking after the conversation. They get an email when the employee replies.
Quick replies	Short ready-made answers above the reply box. One click puts the text in the box, ready to check and send.
Suggested reply	A draft answer the Conversation hub writes for you, using the messages and the linked record. You choose whether to use it.
Application policy	A set of permissions given to users, sometimes called a role. A customer's administrator manages them under Configuration > Advanced > Application policies .
Employee Filter	The part of an application policy that decides which people its users can see, for example only one site. The Conversation hub follows it.

Table 1 — Key terms

What permissions are required

Most “I can’t reply” or “I can’t see that conversation” calls come down to access. Use this table first. Row names are exactly as they appear in **Configuration > Advanced > Application policies**.

TASK	APPLICATION POLICIES ROW	SWITCH
Open the Conversation hub and read conversations	Key features > Conversation hub	Read
Reply to an employee	Key features > Conversation hub	Update
Change the status or priority, resolve, close or reopen	Key features > Conversation hub	Update
Assign a conversation	Key features > Conversation hub	Update
Get suggested replies	Key features > Conversation hub, plus Key features > Queries	Read and Update, plus Read
Open a linked timesheet or shift	Time > Timesheets	Read
Open a linked leave booking	Leave > Leave planner	Read
Open a linked training course	People > Person > Professional development > Courses	Read
See a particular employee’s conversations	The employee must be inside the Employee Filter on the user’s policy	None
Employee: start and reply to conversations in the app	No ESS policy box. Conversations is always on the app’s home screen.	None

Table 2 — Access needed for each task

NOTE

One Update switch covers replying, changing the status and priority, and assigning. A policy cannot allow replies but not assigning. After an administrator changes a policy, the user should click **Log out** and sign back in to pick up the change.

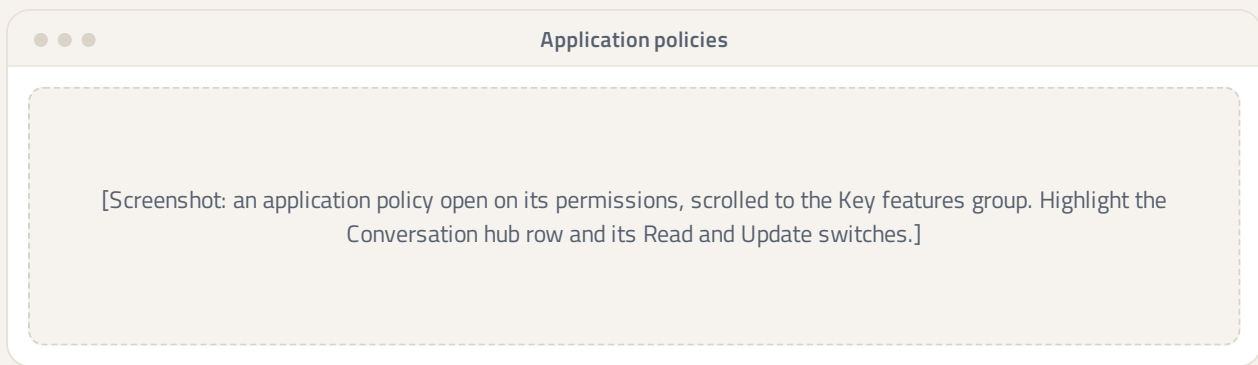


Figure 1 — The Conversation hub row on an application policy

ASKING AND ANSWERING

How it works: Conversation Hub

Conversations always start with the employee, in the app. Each one is about a single record of theirs. When they send it, it appears in the Conversation hub for the staff who look after that employee. Staff reply from the web, the employee gets a notification on their phone, and the two carry on until the question is sorted.

The status keeps track of whose turn it is. When the employee writes, the conversation needs the office. When the office replies, it waits on the employee. You rarely need to change the status by hand, except to resolve or close.

Walkthrough: an employee starts a conversation in the app

Staff often talk employees through this on the phone, so it is worth knowing the screens.

1 Open Conversations

On the app's home screen, tap **Conversations**.

You see: the list of their conversations. If there are none it says **No conversations yet**. Under the heading on the home screen it says **Raise a query**, or how many are open or have new replies.

2 Start a new one

Tap **New** at the bottom of the screen.

You see: **New Conversation**, with **What is this about?** at the top.

3 Choose what it is about

Pick **Timesheet shift**, **Timesheet**, **Leave entry**, **Course** or **My development**.

4 Pick the record

Tap the field below, which says **Tap to select**, and choose from the list, for example one of their recent shifts.

You see: a list headed, for example, **Select a timesheet shift**. If there is nothing to pick, it says **Nothing found for this category**.

5 Add a subject

Type a short subject in **Subject**, such as "Missing clock-out".

6 Write the message

Explain the question in **Message**.

7 Send it

Tap **Start Conversation**.

You see: the new conversation open, with the message and the status **Open**.

Employees can also start from the record itself. The **Timesheet** and **Leave** screens have a speech-bubble button (**Ask about your timesheet**, **Ask about your leave**). A leave booking has **Ask about this leave**, and a course has **Ask about this course**. These open the same form with the record already picked. The **Training** screen has prompts such as **Tell us which skills you want to build**, which start a **My development** conversation.

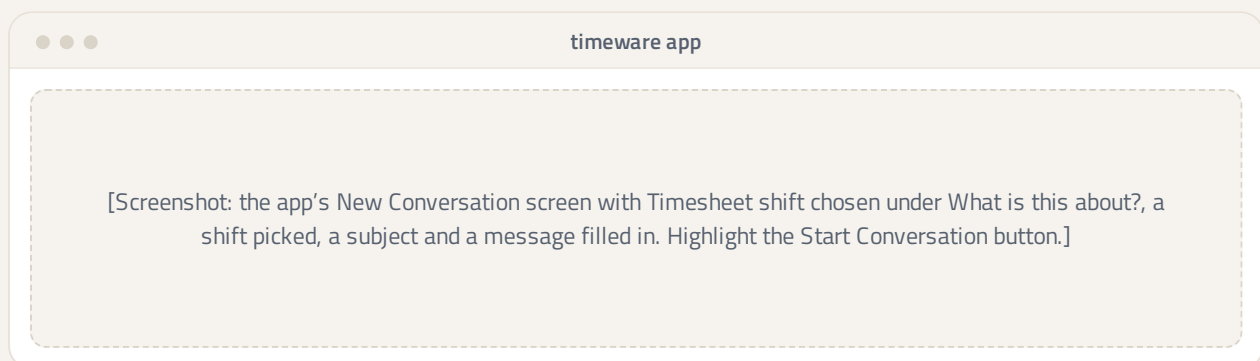


Figure 2 — Starting a conversation in the app

Walkthrough: an employee replies in the app

1 Open the conversation

Tap the notification, or tap **Conversations** and then the conversation. Ones with new replies show a number and a bold subject.

2 Write a reply

Type in the **Write a reply...** box at the bottom.

3 Send it

Tap the send button.

You see: the reply in the thread. The status changes to **Awaiting manager**.

The Conversation hub at a glance

Open the main menu and click **Conversation hub** in the **Home** column, or click **Conversation hub** in the **Quick Links** on the left. The number beside it in Quick Links is how many conversations need you.

- **The lists on the left.** Three tabs: **Needs me** (it is the office's turn), **Waiting** (waiting on the employee) and **Resolved** (resolved and closed). The first two show a count. Newest activity is at the top.
- **Each row** shows the employee's photo and name, a flag for High or Urgent priority, the number of unread messages, and the time of the last message. Below that is the record type, such as **Timesheet shift**, and the subject.
- **The thread in the middle.** The messages, grouped by day, with the employee on the left and staff on the right. The reply box is at the bottom.
- **The panel on the right.** The employee, the linked record, and the **Status**, **Priority** and **Assigned to** fields.
- **The search box** at the top right, **Search by name or subject**.

With nothing open, the middle of the page names who is waiting, for example **Sam is waiting on you**. When nobody is, it says **All caught up!** and **Nobody is waiting on you**. **When an employee writes to you from the app, the conversation shows here**. The page updates by itself when anything changes, so you do not need to refresh it.

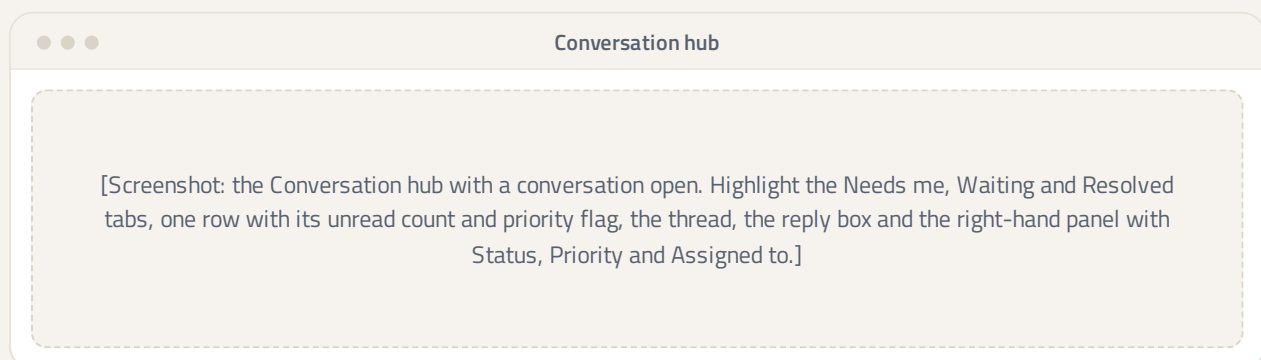


Figure 3 — The Conversation hub

Walkthrough: find and open a conversation

1 Pick a list

Click **Needs me**, **Waiting** or **Resolved**.

You see: the first conversation in that list opens straight away.

2 Or search

Type part of the employee's name or the subject in **Search by name or subject** and press Enter.

You see: only matching conversations. If none match it says, for example, **No conversations match your search: Sam**. Empty the box to see everything again.

3 Open a conversation

Click its row.

You see: the thread, with the record type and subject at the top, followed by **opened** and the date and time it started. The unread count on the row clears.

4 See older messages

In a long conversation, click **Show earlier messages** at the top of the thread.

Walkthrough: reply to an employee

1 Check whose turn it is

Look above the reply box.

You see: **Reply needed** and, for example, **Sam Jones is waiting for your team to reply**. Or, if you have already replied, **Waiting for Sam Jones** and **You can still send an update**.

2 Write your reply

Type in the box that says **Write a reply to the employee....** Or click a quick reply, such as **Thanks for letting us know!** or **Could you share a little more detail?**, and change the text if you need to.

3 Send it

Press Enter, or click the send button (the paper plane). To start a new line instead, press Shift+Enter.

You see: your reply in the thread marked **Sending...**, with an **Undo** button and a short timer.

4 Undo if you need to

Click **Undo** within about 5 seconds to take the reply back and change it.

You see: the text back in the reply box. If you do nothing, the reply is sent.

5 Check it has gone

You see: the reply with your name and the time. The status changes to **Awaiting employee response** and the conversation moves to **Waiting**. The employee gets a notification on their phone.

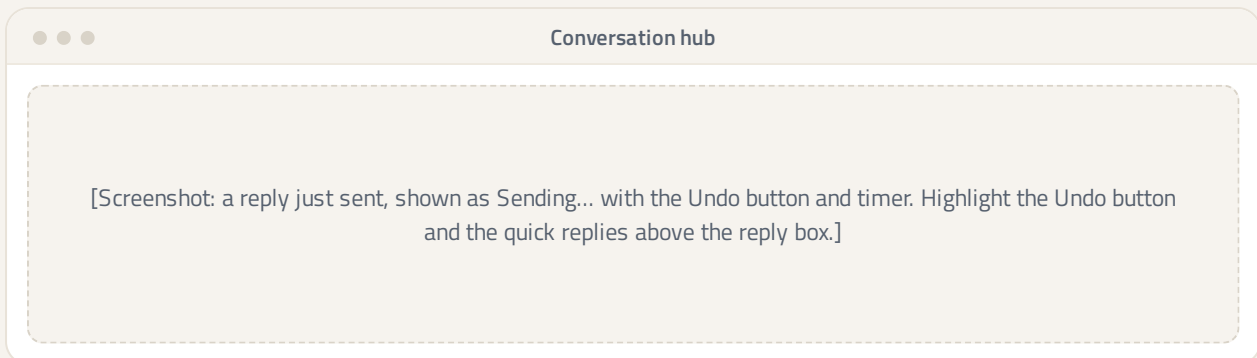


Figure 4 — A reply waiting to go, with Undo

Walkthrough: use a suggested reply

When you open a conversation that needs a reply, the Conversation hub can write a draft for you. It reads the messages and the linked record, such as the shift times or the leave booking, and writes a short answer in the company's language. Nothing is sent until you send it.

1 Open a conversation that needs you

Open a conversation in **Needs me**. Leave the reply box empty.

You see: **Drafting a reply...** in the reply box, with a **Cancel** button. After a few seconds the draft appears in grey inside the box, with **Tab to use suggestion** under it. The quick replies may change to ones written for this conversation.

2 Read the draft

Check it is right. It is only a starting point.

3 Use it

Press Tab, or click the use-suggestion button beside it.

You see: the draft becomes normal text in the box, ready to edit.

4

Or ignore it

Click **Clear**, press Esc, or just start typing your own reply.

5

Send it

Change anything you need to, then press Enter.



Figure 5 — A suggested reply

Walkthrough: open the record the conversation is about

1

Find the record

In the right-hand panel, under the employee's name, find the tinted box with the record type and its details, for example a shift's date and times.

2

Open it

Click the box.

You see: for a shift or timesheet, the employee's timesheet in a window. For a leave booking, the booking window. For a training course, the course window. The conversation stays open behind it.

3

Make any change

If the question needs a fix, such as a missing clock-out, make it in the window and save, as you would on that page.

4

Close the window and reply

Close the window and tell the employee what you did.

If the box cannot be clicked, you do not have Read on that area, or it is a **Development** conversation, which has no record to open. If the record has since been removed, you see **The linked record is no longer available**.

Walkthrough: set the priority and assign a conversation

1 Set the priority

In the right-hand panel, choose **Low**, **Normal**, **High** or **Urgent** under **Priority**.

You see: High and Urgent add a flag to the row in the list. The employee is not told.

2 Assign it

Open **Assigned to**, which says **Unassigned** at first, and choose a user.

You see: their name and initials in the field. An **Open** conversation changes to **In progress**.

From now on that person gets an email when the employee replies.

Walkthrough: resolve, close or reopen a conversation

1 Resolve it

When the question is sorted, click the green **Resolve** button at the top of the thread.

You see: the reply box is replaced by **Resolved. No further replies expected.** and a **Reopen** button. The conversation moves to **Resolved**, and the employee gets **Your query has been resolved.** on their phone.

2 Reopen it if needed

Click **Reopen**.

You see: the status goes back to **Open**, the reply box returns and the employee is told **Your query has been reopened.**

3 Close it for good

To end a conversation completely, choose **Closed** under **Status** in the right-hand panel.

You see: **Closed. Nobody can reply to this conversation now.** The employee is told **This conversation has been closed.** A closed conversation cannot be reopened.



Figure 6 — A resolved conversation

Statuses and where they appear

Pointing at the information icon beside **Status** explains the same thing in the product. The app uses slightly different words for two statuses.

STATUS	WHEN IT IS SET	LIST	IN THE APP
Open	The employee has just started it, or staff reopened it	Needs me	Open
In progress	Someone assigned an open conversation, or chose it by hand	Needs me	In progress
Awaiting manager response	The employee has replied	Needs me	Awaiting manager
Awaiting employee response	Staff have replied	Waiting	Awaiting your reply
Resolved	Staff clicked Resolve	Resolved	Resolved
Closed	Staff chose Closed	Resolved	Closed

Table 3 — Conversation statuses

Attachments

Conversations are text only. Neither the app nor the Conversation hub has a way to attach a photo, a document or a file to a message. The linked record takes the place of an attachment: staff can open the actual shift, timesheet, booking or course from the conversation. If an employee needs to send a document, such as a fit note, point them to the part of the app made for it.

Who can see what

- **Employees** only ever see their own conversations in the app. They see staff replies with the sender's name. They do not see the priority or who it is assigned to.
- **Staff** with Read on the Conversation hub see every conversation for the employees inside their Employee Filter. That includes ones assigned to someone else, not only their own.
- **Staff outside the Employee Filter** do not see that employee's conversations at all, even if the conversation is assigned to them.

- **Linked records** open only for staff who can read that area, such as Timesheets or the Leave planner.
- **Suggested replies** use only the record details the member of staff could see on the page themselves.

Limits at a glance

WHAT	LIMIT	NOTES
Subject	256 characters	Set by the employee in the app. It cannot be changed afterwards.
One message	2,000 characters	The same in the app and in the Conversation hub. The box stops taking text at the limit.
Records to pick from in the app	The 20 most recent	Shifts go back 60 days. Leave shows upcoming bookings and those from the last 90 days, without bank holidays.
Undo after sending	About 5 seconds	After that the reply is sent and cannot be edited or taken back.
Messages shown at first	The latest 50	Click Show earlier messages for more.
Records per conversation	One	For a second record, the employee starts a second conversation.

Table 4 — Limits at a glance

How it connects to other features

- **The timeware app:** every conversation starts here. The employee must have the app set up before they can start one.
- **Timesheets:** shift and timesheet conversations open the employee's timesheet, where you can make the fix they asked about.
- **Leave planner:** leave conversations open the leave booking window.

- **Courses and training:** course conversations open the course window. **My development** conversations let employees ask for training beyond what they have been given.
- **Application policies:** the Conversation hub row decides who can read and reply. The Employee Filter decides whose conversations each user sees.
- **Queries:** suggested replies need Read on Queries and share its daily AI limits.
- **Person records:** the photo in the right-hand panel opens the employee's card, from which you can go to their record.

Things to be aware of

- **Staff cannot start a conversation.** Only employees can, from the app. To contact an employee first, use another route, such as a Social feed post or a phone call.
- **Nobody is told about a new conversation.** A new one has no assignee, so no email goes out. It appears in **Needs me** and adds to the count beside **Conversation hub** in Quick Links. Someone needs to check the hub regularly.
- **Emails go to the assignee only.** When the employee replies, the assigned user gets an email. Unassigned conversations email nobody.
- **Assigning does not check access.** The **Assigned to** list shows all users. Make sure the person you pick can open the Conversation hub and has the employee inside their Employee Filter.
- **Sent is sent.** Once the Undo time has passed, a reply cannot be edited or deleted. Put a mistake right with a follow-up message.
- **Leaving sends the reply.** If you switch conversation, change the status or leave the page while a reply shows **Sending...**, it is sent straight away. Closing the browser tab asks you first.
- **An employee reply reopens a resolved conversation.** The app asks **Reopen conversation?** first. Staff must click **Reopen** before they can reply to a resolved one.
- **Closed is final.** Nobody can reply to a closed conversation or change its status. Use **Resolve** unless you are sure.
- **Suggested replies need checking.** They are written by AI from the messages and the record. Read every draft before you send it. None is written when it is the employee's turn, or when AI is switched off for the company.
- **When a draft is out of date.** If the employee writes again or the record changes while you are typing, you see **The conversation has changed. Review your reply or generate a new draft.** In a very long conversation you may see **Earlier messages were omitted to fit the context limit.**
- **When the day's AI use runs out,** no drafts are written and a line under the box says when they return, for example **AI allowance used up. Resets in 3h 12m.** Replying by hand still works.

- **The record may have moved on.** If the linked shift or booking has been removed, the app shows **The item this conversation was about no longer exists**, and the hub shows the details saved when the conversation started.
- **The app shortcuts follow the ESS policy, the New button does not.** The ask buttons sit on the Timesheet, Leave and Training screens, which the ESS policy can hide. **New** on the Conversations screen always offers every type. **[Check: that employees whose ESS policy hides timesheets or training should still be able to start conversations about them.]**
- **A second Conversations row.** Application policies also has a **Conversations** row under **People > Person > Employee relations**. It does not give access to the Conversation hub. **[Check: what this row is for, as there is no Conversations page on a person's record today.]**
- **Without Read, the menu shows a padlock.** The **Conversation hub** link in the main menu shows **No access**. The Quick Links entry still shows. **[Check: what a user without Read sees if they open the Conversation hub from Quick Links.]**

Common support questions

“I can read conversations but there's no reply box.”

Their policy has Read but not Update on **Key features > Conversation hub**. Or the conversation is resolved or closed: a resolved one needs **Reopen** first, and a closed one cannot be replied to.

“An employee says they sent a question, but I can't see it.”

Check the user's Employee Filter includes that employee. Then check all three tabs and search by the employee's name. If a colleague can see it, the difference is in their policies.

“How do I start a conversation with an employee?”

You can't from the Conversation hub. Conversations are started by employees in the app. Ask the employee to tap **Conversations** and then **New**.

“Why didn't I get an email about a new conversation?”

New conversations have no assignee, so nobody is emailed. Once you assign yourself, you get an email each time the employee replies.

"I don't get suggested replies."

Check the policy has Read on **Key features > Queries** as well as Read and Update on the Conversation hub. No draft is written when it is the employee's turn, when the reply box already has text, or when the day's AI use has run out.

"The employee wants to send us a photo."

Conversations are text only. If the photo is of a document the app has a place for, such as a fit note, point them there. Otherwise agree another way to send it.

"The record box won't open."

The user needs Read on the matching area: **Time > Timesheets, Leave > Leave planner** or **People > Person > Professional development > Courses. Development** conversations have no record to open.

Try it yourself

Use a demo or training company and a test employee with the app, never a customer's.

1 Start a conversation as the employee

In the app, tap **Conversations**, then **New**. Choose **Timesheet shift**, pick a recent shift, enter the subject "Missing clock-out" and a short message, and tap **Start Conversation**.

2 Find it in the Conversation hub

In the web version, open the Conversation hub. Find the conversation in **Needs me** and open it.

3 Open the record

Click the record box in the right-hand panel to open the timesheet, then close the window.

4 Triage it

Set **Priority** to **High** and assign it to yourself. Note the new status.

5 Reply

Use or clear the suggested reply, write your own answer and send it. Try **Undo** once, then send it again.

6 Reply as the employee, then resolve

In the app, reply "Thanks". Back in the hub, see it move to **Needs me**, then click **Resolve**.

TIP

Check your understanding. A supervisor has been assigned a conversation, but it does not appear in their Conversation hub. Their policy has Read and Update on the Conversation hub row. What would you check next?

Answer: the Employee Filter on the supervisor's policy. The hub only shows conversations for employees inside it, even ones assigned to the supervisor. Assigning does not check who can see the employee.