
TRAINING GUIDE

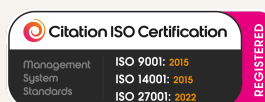
Level 1 HR (Core)

How to add, edit, copy and delete people in timeware® HRMS, and the essential setup every employee needs so leave, timesheets and the app work for them.

PRODUCT	REFERENCE	VERSION
timeware® HRMS	t2-1035	v1.0

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Certificate No: IMS-491342025,
509932026



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What this covers

This is the Level 1 guide to the core of HR in timeware HRMS: the people themselves. By the end you will be able to:

- add a new employee with the enrolment wizard, and invite them to the app
- edit an employee's details and their employment
- explain what deleting an employee really does, and how it differs from a leaver
- copy an employee to set up someone similar quickly
- explain the essential setup every employee needs, such as a work pattern and a leave policy, and what goes wrong without it.

Why it matters

Almost everything in timeware HRMS hangs off the employee record. Leave allowances, timesheets, rosters, clocking devices, the app and reports all read from it. When a customer says "leave isn't working for this person" or "she has no timesheets", the cause is very often a missing or wrong choice on the employee's record.

Getting a new starter set up correctly the first time saves a lot of support calls later.

Key terms

TERM	WHAT IT MEANS
Person	The web pages for one employee's record. You open them from Person in the People column of the main menu.
Enrolment	Adding a new employee. It is done in the Create New Employee wizard.
Employment	The record of one period of work with the company: its policy, status, dates, site, pattern and policies. A new employment is added when someone rejoins.
Employment policy	The rules for an employment's life cycle: its starting status, probation and notice periods, and the stages and tasks from pre-employment to leaving.
Employment status	Where someone stands, such as candidate, employee or leaver. Statuses change on dates set in the employment, such as the first day of work.
Site	Where the person works. It sets their time zone.
Job profile	The person's job, such as Warehouse Operative.
Work pattern	The person's regular schedule of shifts. Leave and timesheets use it to find the right shift for each day.
Leave policy	The rules for the person's leave allowance, such as how many days of annual leave they get.
Pay policy	The rules that turn worked time into pay, such as basic hours and overtime.
ESS policy	The settings for what the person can do in the timeware app (Employee Self-Service).
Line manager	The user who manages the person. Line managers are chosen from users set up as available managers.
Enrolment settings	The company's choice of which fields must be filled in when adding a person. Fields it makes compulsory show company required .
Leaver	Someone whose employment has ended through the offboarding dates. Their record stays in the product.
Application policy	A set of permissions given to web users. Managed under Configuration > Advanced > Application policies .

Table 1 — Key terms

What permissions are required

The rows below are in **Configuration > Advanced > Application policies**, under **People**.

THE USER WANTS TO...	THEY NEED
See people's records	Read on People > Person . Each page in the Person sidebar also needs Read on its own row, for example Personal or Employment .
Add a person, or copy one	Create on People > Person . Without it, Add Person and Copy person are greyed out.
Edit name, gender and work contact details	Update on People > Person > Core > Essential .
Edit personal details	Update on People > Person > Core > Personal .
Change an employment, its assignments and policies	Update on People > Person > Employment and compensation > Employment . Adding an employment for someone who rejoins needs Create.
Delete a person	Delete on People > Person . Without it, Delete person is greyed out.
Invite someone to the app, or revoke it	The ESS invitations permission. [Check: which Application policies switch grants "Invite to app" and "Revoke access"; it is not on any row in the policy editor.]
Choose which enrolment fields are required	Update on Advanced > Configuration > Enrolment settings .

Table 2 — Access needed for each task

NOTE

After an administrator changes an application policy, the user should click **Log out** and sign back in to pick up the change.

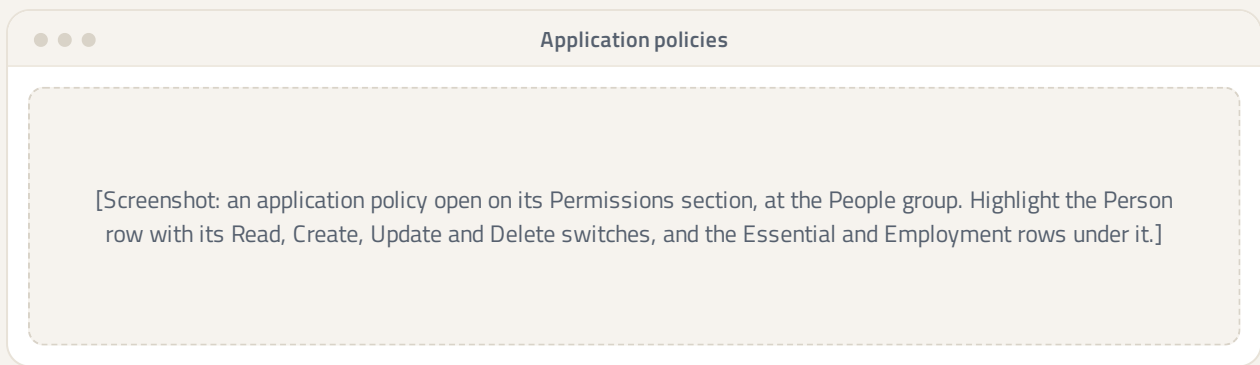


Figure 1 — The Person rows on an application policy

TASK 1

Adding a new employee

New employees are added with the **Create New Employee** wizard. It walks through nine steps, from the person’s name to their policies, and ends with a summary. The essential setup in the last part of this guide, such as sites, work patterns and policies, must already exist so you can pick from it.

What must be filled in

A few fields are always required. The company can make more fields compulsory in **Configuration > Advanced > Enrolment settings**; in the wizard these show **company required** instead of **required**.

ALWAYS REQUIRED	REQUIRED ONLY IF THE COMPANY CHOOSES
Title, First name, Surname, Gender	Middle name, Maiden name, Preferred pronouns, Payroll number, Work email address, Work mobile, Work phone, Photo, personal email, mobile and phone, Date of birth, Marital status, Address, Emergency contact
Employment policy and Initial employment status	Organisation, Division, Department, Group, Line manager
Site	Work pattern, Leave policy, Pay policy, ESS policy, Transport policy, custom groupings
Job profile	

Table 3 — Required fields when adding a person

IMPORTANT

By default, the wizard lets you save a person with no work pattern, leave policy or pay policy. The person is created, but leave and timesheets will not work for them until those are added. See *The essential setup an employee needs*.

Walkthrough: add a new employee

1 Open the wizard

Open the main menu, click **Person** under **People**, then click **Add Person** in the bar at the top of the page.

You see: the **Create New Employee** window, with the steps listed down the side. Use **Next** and **Previous** to move between them.

2 Step 1: Essential

Choose the **Title**, type the **First name** and **Surname**, and choose the **Gender**. Add the **Payroll number** and **Work contact details** if you have them. A work email is needed later to invite the person to the app.

3 Steps 2 to 5: Photo, Personal, Address, Emergency Contact

Add what you have. On the **Address** and **Emergency Contact** steps you can choose **Complete now**, **Draft** to finish later, or **Skip**, unless the company has made them required.

4 Step 6: Employment

Choose the **Employment policy**. It fills in the **Initial employment status**, the probation and notice periods and **Remote work**. If the company has set up a **Workflow template**, it may fill in more of the employment for you.

5 Pre-employment and Onboarding dates

Depending on the employment policy, one or two date steps follow. Answer **Is the first day of work known?** with **Known** and pick the date, or choose **Not known yet**. Tasks get a **Due on** date.

You see: with **Not known yet**, the hint **Until a first day of work is set, no timesheets or rosters are created for this employee and their length of service can't be worked out**.

6 Organisation

Choose the **Site** they work at. **Organisation** and **Division** are optional unless the company requires them. The organisation also hides work patterns, shifts and pay elements that don't apply to it.

7 Department and Team

Choose the **Department**, **Group** and **Line manager**.

8 Job Profile and Work Pattern

Choose the **Job profile** and the **Work pattern**. If the pattern repeats over several weeks, pick which week they start on in **Week rotation**.

9 Custom groupings

This step only appears if the company uses custom groupings. Choose the right ones.

10 Step 7: Policies

Choose the **Leave policy**, **Pay policy**, **ESS policy** and, if used, the **Transport policy**. Choose **Device groups** for the clocking devices they will use.

11 Step 8: Drafts

Choose **Draft** for any extra record you want to finish later. Drafts show on the person's Insights page until they are complete.

12 Step 9: Finish

Check the summary. Anything left out shows **Not set** or **Skipped**.

13 Save

Click **Save and go to Insights** to open the new record, or **Save and add another person** to start the next one.

You see: Employee has been created successfully. The person gets the next employee number automatically.

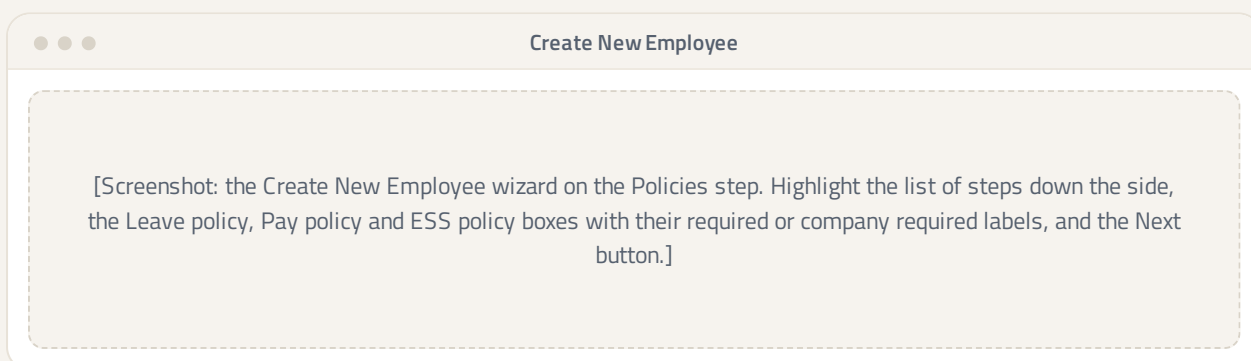


Figure 2 — The Create New Employee wizard

Walkthrough: invite the new starter to the app

1 Open their Insights page

After saving with **Save and go to Insights**, you are on it already. Otherwise open the person and click **Insights** under **Core** in the sidebar.

2 Find App access

Look for the **App access** panel.

You see: a status of **Not invited**, **Invited** or **Active**. If there is no work email you see **Add a work email to invite this employee**.

3 Send the invitation

Click **Invite to app**.

You see: Invitation sent. The person gets an email with their username, usually their first and last name, such as jane.smith. The status changes to **Invited**.

4 They register in the app

The person downloads the timeware app, enters their details and confirms a code sent to their email or mobile. The status then changes to **Active**. If they lose the email, click **Resend invitation**.

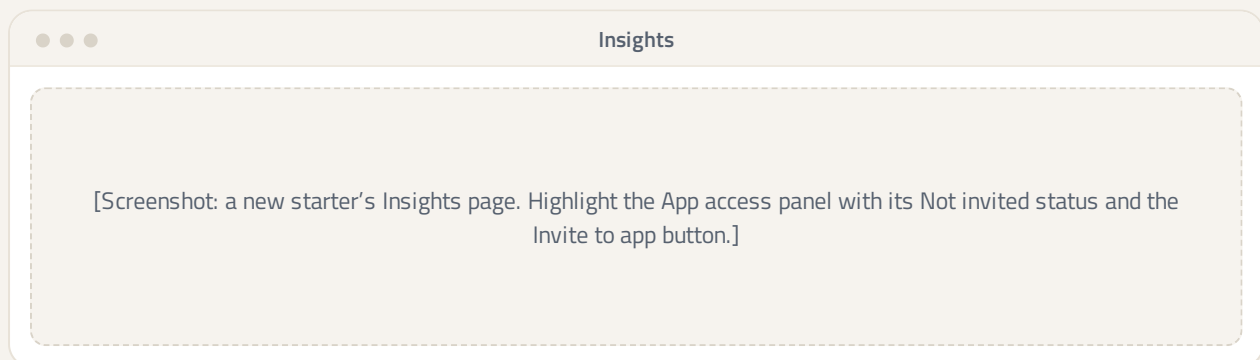


Figure 3 — Inviting a new starter to the app

Editing an employee

A person's details are split across the pages in the Person sidebar. The core ones are:

PAGE	WHAT IT HOLDS
Essential	Title, name, previous names, gender and pronouns, payroll number and work contact details.
Personal	Personal email and phone numbers, marital status and date of birth.
Addresses and Emergency contacts	Their addresses and the people to contact in an emergency.
Employment	Each employment: policy, status, start and end, and all the assignments and policies chosen in the wizard.

Table 4 — Where a person's core details live

Walkthrough: edit name or contact details

1 Open the page

Open the person and click **Essential** (or **Personal**) under **Core**.

2 Edit and save

Click **Edit**, make the change, then click **Update**. Click **Cancel** to leave without saving.

You see: Essential details saved.

Walkthrough: change a work pattern, policy or manager

1 Open Employment

Click **Employment** under **Employment and compensation**.

You see: a card for each employment, with its **Employment status**, **Employment start** and **Employment end**.

2 Edit the current employment

Click **Edit** on the current card.

You see: the **Update employment** window, with sections such as **Organisation and site**, **Department, group and managers**, **Job profile and work pattern** and **Policies and clocking devices**.

3 Make the change

Open the right section and change the value, for example a new **Work pattern** or **Leave policy**.

4 Save

Click **Update**.

You see: Employment saved.

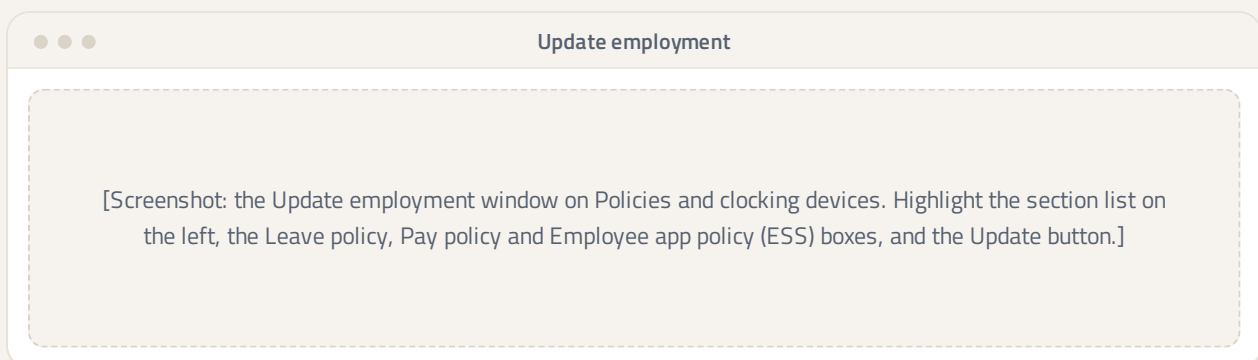


Figure 4 — Changing policies on an employment

What a change affects

- **Changes apply when you click Update.** Assignments and policies have no "from" date; the new value is used from then on. The one exception is the **Usual cost centre**, which has an **Effective from** date.
- **Leave policy.** Leave allowances for the new policy are set up straight away, so the person can book leave the same day. **[Check: what happens to leave already booked under the old policy's allowance.]**
- **Work pattern.** New timesheets and rosters follow the new pattern. **[Check: whether timesheets already created for the current pay period update to the new pattern.]**
- **ESS policy.** What the person can do in the app changes to match the new policy.
- **Site.** The person's time zone follows the site, so dates such as their first day are read on that site's clock.
- **First day of work.** Changing it moves when their status changes and when timesheets start.

Making someone a leaver, or bringing them back

When someone leaves, don't delete them. Open the current employment with **Edit**, go to the **Offboarding** section and set the dates, such as **End of final working day**. Each date shows **Their status becomes** and the new status. When the final day has passed, their status becomes the leaving status and their app access is removed. Their records stay in the product.

If someone rejoins, add a new employment for them on the **Employment** page rather than adding them again.

TASK 3

Deleting an employee

Deleting is for records that should never have existed, such as a duplicate or a test person. For someone who has left, use offboarding instead.

What delete actually does

- **The employee is permanently deleted.** They no longer show in searches or on the Person pages, and this can't be undone.
- **Some details are wiped at once.** Their payroll number, work email address, work mobile and work phone are cleared, and so are their bank account details. These can then be used for someone else.
- **App access is removed.** Their app login is deleted, so they are signed out and cannot sign back in.
- **Clocking devices are updated.** Connected access control devices are told to remove the person.
- **Their licence place is freed.** Deleted people don't count towards the company's live employee limit.
- **Their employee number is never reused.**

	LEAVER (OFFBOARDING)	DELETED
Use it for	Anyone who has worked for the company and left.	Duplicates, test people and mistakes.
Record	Stays in the product, with its history.	Permanently deleted.
App access	Removed after the final working day.	Removed straight away.
Can they come back?	Yes: add a new employment.	No. Deleting can't be undone.

Table 5 — Leaver compared with deleted

Walkthrough: delete a person

- 1 Open the person**
 Open the person you want to delete, on any of their pages.
- 2 Click Delete person**
 Click **Delete person** in the bar at the top.

You see: Wait a second! and You are about to permanently delete this employee. This cannot be undone.
- 3 Confirm**
 Tick **I understand this is permanent.** and click **Delete**.

You see: Person deleted. The page moves to another person.

TASK 4

Copying an employee

Copy person opens the **Create New Employee** wizard with the employment choices of the person you have open already filled in. It is a quick way to set up a new starter who will do the same job as someone else.

COPIED FROM THE CURRENT EMPLOYMENT	NOT COPIED
Employment policy, probation and notice periods, remote work	Name, gender, photo and all contact details
Organisation, division, site, department and group	Personal details, address and emergency contact
Line manager	Other manager types, such as deputy managers
Job profile, work pattern and week rotation	First day of work and task dates
Leave, pay, ESS and transport policies, device groups and custom groupings	Salary, bank, leave taken, timesheets and all other records

Table 6 — What Copy person fills in

Walkthrough: copy a person

- 1 Open the person to copy**
 Open someone whose job and set-up match the new starter.
- 2 Click Copy person**
 Click **Copy person** in the bar at the top.

You see: the **Create New Employee** wizard. The Essential step is empty; the employment, assignment and policy steps are already filled in.
- 3 Fill in the new person and check the rest**
 Enter the new person's details and first day of work. Step through the filled-in steps and change anything that differs.
- 4 Save**
 Click **Save and go to Insights**. The original person is not changed.

The essential setup an employee needs

These are the things every employee should have for the core of the product to work. They are built by an administrator in **Configuration**; at Level 1 you need to know what each one is, and pick the right one when adding or editing a person.

SETTING	WHAT IT CONTROLS	SET UP IN CONFIGURATION	WITHOUT IT
Employment policy	Starting status, probation and notice, and the stages and dates from joining to leaving.	People > Employment policies (statuses in People > Employment statuses)	Always required, so a person can't be saved without one.
First day of work	When their status becomes an employee and timesheets start.	Set on the person, from the employment policy's dates.	No timesheets or rosters, and length of service can't be worked out.
Site	Where they work and their time zone.	People > Sites	Always required.
Job profile	Their job, for grouping, filtering and reports.	People > Job profiles	Always required.
Work pattern	Their regular shifts. Leave and timesheets use it to find each day's shift.	Time > Work patterns	No timesheets are created for them, and leave has no shift to work from.
Leave policy	Their leave allowances, such as annual leave.	Leave > Leave policies	No allowance is set up. Booking leave is blocked with "No ... entitlement covers the selected dates."
Pay policy	How their worked time is turned into pay, such as basic and overtime.	Time > Pay policies	Timesheets have no pay rules. [Check: exactly what a timesheet shows without a pay policy.]

SETTING	WHAT IT CONTROLS	SET UP IN CONFIGURATION	WITHOUT IT
ESS policy	What they can do in the app, such as clocking and leave requests.	People > ESS policies	The app uses the organisation's ESS policy, or the company's default one.
Line manager	Who manages them, for reporting lines and manager views.	Advanced > Users: tick Available as manager and set Manager type to Line manager	They have no manager, so manager-based views and filters leave them out.
Department and group	Their team, for filtering, grouping and audiences.	People > Departments, People > Groups	They drop out of filters and reports by team.
Device groups	Which clocking devices they can use.	Time > Device groups	They are not given the clocking devices in those groups to clock in and out on.

Table 7 — The essential setup, what it does and what happens without it

Organisation, division, transport policy and custom groupings are optional. Use them if the customer's set-up does.

TIP

To make sure nobody is saved without the essentials, the company can tick **Required** for **Work pattern, Leave policy, Pay policy, ESS policy** and **Line manager** in **Configuration > Advanced > Enrolment settings**.

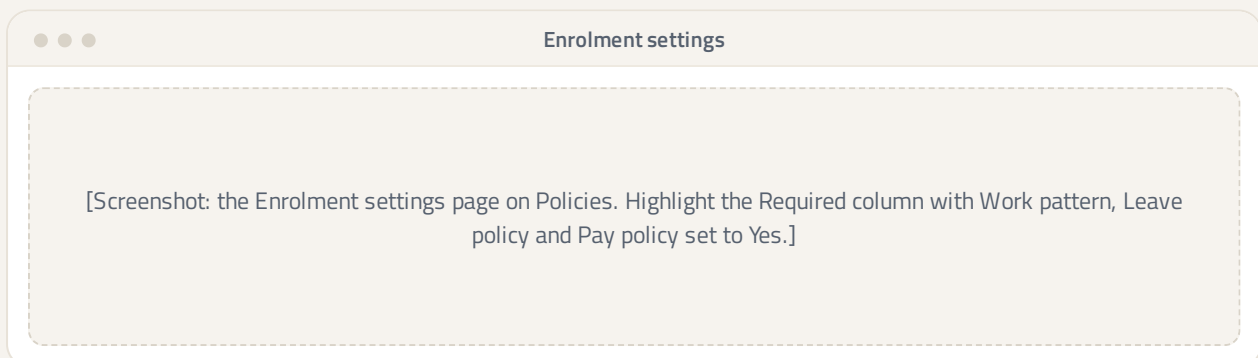


Figure 5 — Making the essentials required in Enrolment settings

How it connects to other features

- **Leave Management:** the leave policy sets up allowances, and the work pattern gives the shifts leave is taken from.
- **Timesheets and rosters:** are created only for people with a work pattern, an active status and a first day of work. The pay policy works their hours into pay.
- **The timeware app:** the ESS policy decides what they see. They need a work email to be invited.
- **Clocking devices:** device groups decide where they can clock in. Deleting a person removes them from connected devices.
- **Dashboard:** the **App invitations** widget lists people still to be invited, and drafts from enrolment show on each person's Insights page.
- **Application policies:** each person page has its own row, so a user can see some pages and not others.

Things to be aware of

- **The wizard only insists on a few things.** Unless the company has changed **Enrolment settings**, a person can be saved with no work pattern, leave policy or pay policy.
- **No first day, no timesheets.** Choosing **Not known yet** is fine for a future starter, but remember to set the date later on the Employment page. **[Check: whether a new starter's timesheets appear straight away or after the next scheduled timesheet run.]**
- **Delete is not for leavers.** Deleting permanently removes the person and their history. Use offboarding for anyone who has worked for the company.
- **Delete can't be undone.** Check you have the right person open before you confirm.
- **Duplicates are blocked.** A new person can't have the same employee number, payroll number or work email as someone else. The wizard shows **A duplicate exists against another person.**
- **Live employee limit.** If the company is at its limit, saving shows **This tenant has reached the maximum live employee limit of** and the limit. Leavers count towards a separate limit for archived people; deleted people count towards neither.
- **Line managers are users.** Only users with **Available as manager** ticked and **Manager type** set to Line manager appear in the **Line manager** list.
- **The organisation filters choices.** Picking an organisation hides work patterns and other items that don't belong to it.

Common support questions

“The Add Person button is greyed out.”

The user’s policy needs Create on **People > Person**.

“A new starter can’t book leave.”

Check their employment has a **Leave policy**. Without one, no allowance exists and booking is blocked.

“A new starter has no timesheets.”

Check they have a **Work pattern** and a first day of work on their current employment, and that the first day has arrived.

“There’s no Invite to app button.”

The person needs a work email address on their **Essential** page. If they have one, check the user’s permissions for app invitations.

“The manager I want isn’t in the Line manager list.”

That person needs a user account with **Available as manager** ticked and **Manager type** set to Line manager, under **Configuration > Advanced > Users**.

“The Delete person button is greyed out.”

The user’s policy needs Delete on **People > Person**. If the person has left, suggest offboarding instead.

Try it yourself

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

1 Look at the rules

Open **Configuration > Advanced > Enrolment settings** and note which fields show **Required**.

2 Add a person

Add "Training Starter" with a work email, a site, a job profile, a work pattern, a leave policy, a pay policy and an ESS policy. Set a first day of work of today.

3 Invite them

On their Insights page, click **Invite to app** and check the status changes to **Invited**.

4 Copy them

With Training Starter open, click **Copy person**. Add "Training Copy" and compare which steps were already filled in.

5 Change a policy

On Training Copy's Employment page, change the leave policy and click **Update**.

6 Tidy up

Delete both practice people with **Delete person**, and note what the confirmation says.

TIP

Check your understanding. A customer says a warehouse operative who left last Friday should be "removed from the system", and asks you to delete her. What do you advise?

Answer: don't delete her. Set the offboarding dates on her employment so she becomes a leaver. Her history stays on her record, her app access ends after her final day, and she no longer counts towards the live employee limit. Delete is only for duplicates and mistakes.