
TRAINING GUIDE

Level 1

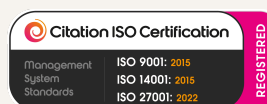
Document Management

How to find a person's documents with Document search, and how to keep the company's shared files in the Media library.

PRODUCT	REFERENCE	VERSION
timeware® HRMS	t2-1040	v1.2

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1	What this covers	3
2	Why it matters	3
3	Key terms	4
4	What permissions are required	5
5	How it works: Document search	6
6	How it works: the Media library	11
7	Limits at a glance	15
8	How it connects to other features	15
9	Things to be aware of	17
10	Common support questions	18
11	Try it yourself	20

What this covers

This is the Level 1 guide to Document Management. It covers two features in depth:

- **Document search.** One search box that looks inside the documents stored on people's records, and takes you straight to the one you need.
- **The Media library.** The company's shared store of documents, images and videos that other parts of the product can reuse.

For each one you will learn where it lives, who can use it, every step a user takes, what they see at each stage, the limits, and the questions customers ask most.

This guide does not cover adding documents to a person's record, sending documents to employees, or pre-filled PDF forms.

Why it matters

An HR team collects a lot of paperwork: passports for right to work checks, DBS certificates, fit notes, signed contracts, training certificates. Each file is stored against the right person and the right part of their record. Document search saves the team from opening record after record to find one file. They type a word they expect to be in the document and get a ranked list, grouped by person.

The Media library solves a different problem. Some files are used again and again: a company handbook, a standard form, a welcome video. The Media library holds one master copy, so people pick it from a list instead of uploading the same file each time.

Key terms

TERM	WHAT IT MEANS
Person record	Everything held about one person, split into areas such as Addresses , Right to work or Salaries . Most areas can hold documents. The product calls this area Person .
Document search	A search window that looks through the text inside documents on person records. It opens from the main menu.
Category	In Document search, the type of record a document belongs to, for example Right to work or Fit note . You can search all categories or just one.
Excerpt	The short passage from inside the document that matched your search, shown under each result.
Match score	A percentage bar on each result showing how closely the document matches what you typed. Higher is better.
Media library	The company-wide store of reusable files. It has three tabs: Documents , Images and Videos .
Media item	One file in the Media library, with its name, description and links.
Link to Feature	The list of product areas a media item is meant for, such as Social feed or Right to work . It decides where the item is offered when someone clicks Choose from Media Library . Every item needs at least one.
Thumbnail	The small preview picture on a media item's card. The product makes one for images and PDFs. Other files show a file-type icon.
Processing	After a video is uploaded, the product converts it so it plays smoothly. Until that finishes the video cannot be played or used.
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. Document search follows it.
Read, Create, Update, Delete, Upload Files	The switches on each row of an application policy. Read means "can see", Create "can add", Update "can change", Delete "can remove", and Upload Files "can send a file from their own computer".

Table 1 — Key terms

What permissions are required

Most “it’s not working” calls about these features come down to access. Use this table first. The row names are exactly as they appear in **Configuration > Advanced > Application policies**.

THE USER WANTS TO...	THEY NEED
See Document search or Media library in the menu	Nothing. Both links are shown to every web user.
Actually run a document search	The Document search permission on their policy. There is still no row for it on Application policies. The standard Everything policy has it. Without it, the category list is empty and pressing Enter shows You do not have sufficient permissions to access this item. [Check: how a customer can get Document search on a custom policy. Agree the route with the product team.]
See a category’s documents in the results	Read on the matching row, for example People > Person > Compliance and legal > Right to work for right to work documents. See Table 3.
See a particular person’s documents	That person must be inside the Employee Filter on the user’s policy. Document search leaves out everyone else.
See what is in the Media library	Read on Key features > Media library . Without it the window opens empty, every tab shows 0, and the message You do not have sufficient permissions to access this item. appears.
Add a new media item	Create and Upload Files on Media library. With Create alone, the + Add button works but the upload box is missing, so nothing can be saved.
Change a name, description or links	Update on Media library. Replacing the file itself also needs Upload Files.
Remove a media item	Delete on Media library, and the item must not be used by a workflow template.
Pick a library file elsewhere with Choose from Media Library	Read on Media library, as well as permission for the feature they are working in.

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. Until they do, their menus and buttons can still reflect the old permissions. The policy screen says the same: **Permission changes require affected users to log out and back in for updates to take effect.**

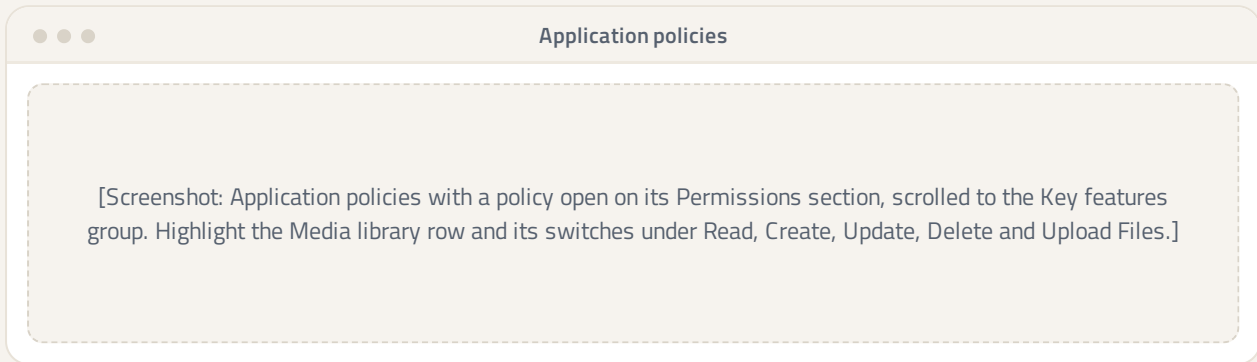


Figure 1 — The Media library row on an application policy

FINDING DOCUMENTS

How it works: Document search

Document search reads the text inside documents that have been added to people's records. It works on meaning as well as exact words, so a search for "passport" can also bring back a right to work document that talks about travel documents. Each result gets a match score, and weak matches are left out.

It only shows documents for people the user is allowed to see. If their application policy has an Employee Filter, for example only one site, documents for anyone outside it never appear.

Walkthrough: find a document

1

Open the main menu

Click the menu button (three lines) at the top of the screen, or click in the **Search pages, people and actions** box.

You see: the main menu opens. Along the bottom is a row of links: **Find person, Reports, Queries, Document search** and **Configuration**.

2 Click Document search

You see: a large window titled **Document search**. On the left is a category list showing **All**. On the right is a search box. The middle says **Search for a document**, with a tip to type a word you would expect to find in the document.

3 Optional: choose one category

Open the category list and choose one, for example **Right to work**.

You see: only the categories your policy can read are listed. Click the small cross to go back to **All**.

4 Type what you are looking for

Type a word or phrase in the search box, for example a person's name, "passport" or a course name. You can press Ctrl+K to jump to the box.

You see: the words **Press enter** appear at the end of the box. Nothing is searched until you do.

5 Press Enter

Or click the magnifying glass.

You see: a line such as **3 results for "passport"**. Results are grouped under each person's name and photo, with a count such as **2 documents**. The first result is selected and shown in a panel on the right.

6 Fold a person's results away

Click a person's name bar to fold their results away. Click it again to open them.

7 Click a result

You see: its details in the right-hand panel: the file name, its category, the person (click their name to go to their record), the **File type**, a longer excerpt, and up to three buttons.

8 Click Open to open the file itself

You see: a new browser tab. PDFs and pictures open in the browser. Word, Excel and PowerPoint files download with their original file name.

9 Or click View or Edit

View shows the record the document belongs to. **Edit** lets you change it. Both work without leaving the search.

You see: the record's own window, for example the person's right to work entry, on top of the search. Close it to return to your results.

10 Click Close when you are done

Close is at the bottom right. The round arrow button at the bottom left (**Refresh**) runs the same search again.

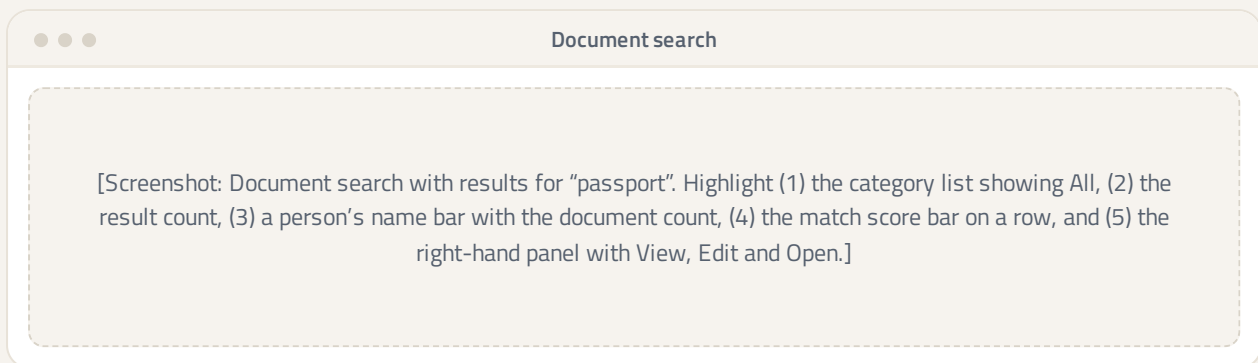


Figure 2 — Document search results

What each result shows

- **File icon and name**, with the words you searched for highlighted.
- **Category chip**, for example **DBS check**.
- **Excerpt**: the matching passage from inside the file, with your words highlighted.
- **Match score**: a bar and percentage. Only results scoring about 25% or more are shown, so loosely related documents are hidden.

Results are ranked best first. The person with the best-matching document comes first. At most 50 results are shown. When there are more, a note appears: **Showing top 50 results. Refine your search to find more specific documents.**

If nothing matches you see **No documents found for "..."** with a tip to check the spelling, try a shorter or different word, or set the category list back to **All**.

View and **Edit** appear for the person record categories. They do not appear for **Leave entry**, **Fit note** or **Training course** results. For those, use the person's name link or **Open**.

Edit is offered even when the user's policy can only read that kind of record. They can make changes in the window, but saving is refused with **You do not have sufficient permissions to update this item.**

What Document search looks inside

Document search covers documents on these parts of a person's record. The right-hand column is the row on an application policy that controls whether a user sees them. All rows are under **People > Person** unless shown otherwise.

CATEGORY IN DOCUMENT SEARCH	APPLICATION POLICIES ROW (NEEDS READ)
Address	Core > Addresses
Emergency contact	Core > Emergency contacts
Bank	Core > Banks
Employment	Employment and compensation > Employment
Benefit	Employment and compensation > Benefits
Salary	Employment and compensation > Salaries
Pension scheme	Employment and compensation > Pensions
Right to work	Compliance and legal > Right to work
DBS check	Compliance and legal > DBS checks
Working time regulation	Compliance and legal > Working time regulations
Trade union membership	Employee relations > Unions
Grievance	Employee relations > Grievances
Disciplinary	Employee relations > Disciplinary
Exit interview	Employee relations > Exit interviews
Training	Professional development > Courses
Review	Professional development > Reviews
Achievement	Professional development > Achievements
Education	Professional development > Education

CATEGORY IN DOCUMENT SEARCH	APPLICATION POLICIES ROW (NEEDS READ)
Health assessment	Health and safety › Health assessments
Disability	Health and safety › Disabilities
Accident	Health and safety › Accidents or injuries
Mental wellbeing	Health and safety › Mental wellbeing
Leave entry	Leave › Leave planner
Fit note	Leave › Leave planner
Training course	People › Configuration › Training courses

Table 3 — Document search categories and the Application policies row behind each one

Not included:

- The Media library. To find a library file, use the search box inside the Media library.
- Driving licence documents. They are not offered as a category and do not appear in results.
[Check: whether driving licence documents are meant to be searchable.]
- Documents attached to a training course in Configuration. **Training course** is listed as a category, but it never returns results. Those files are not linked to a person, and Document search only returns documents that are.

File types that are read: PDF, Word, PowerPoint, plain text, RTF, web pages and CSV. Pictures (JPG, PNG, GIF, BMP and TIFF) are read too: the product recognises the text in scans and photos, so a photographed passport can be found. Excel files (.xls, .xlsx) are skipped, and so are WebP pictures and video or audio files.

Timing: the live search service checks for new documents every five minutes, so a file added just now may take a few minutes to show. [Check: how long large or scanned files take to appear in practice.]

How it works: the **Media library**

The Media library is a large window with three tabs: **Documents**, **Images** and **Videos**. Each tab shows a count of everything in it. Items appear as cards, newest first, up to four across and 50 to a page. Each item is tagged with the product areas it is for, using **Link to Feature**.

A new company starts with three PDFs already in the library, linked to **Employment policies: Pre-Employment Form (Standard)**, **Pre-Contractor Form (Standard)** and **Return to Work Form (Standard)**.

Walkthrough: open the library and find a file

1 Open the main menu

You see: the **Home** column lists your company's name with **Subscription**, then **Workforce dashboard**, **Social feed**, **Conversation hub** and **Media library**. You can also type "media" in the menu's search box.

2 Click Media library

You see: the **Media library** window, open on the **Documents** tab. Page arrows and a search box sit above the cards.

3 Choose a tab

Click **Documents**, **Images** or **Videos**.

4 Search the library

Type in the **Search...** box and press Enter.

You see: only items whose name or description contains your words, with the words highlighted. The search does not look at the file name or inside the file. If nothing matches: **No results found**.

5 Read a card

From top to bottom it shows the thumbnail, the name and file-type icon, the description, the file size, coloured chips for its linked features (up to six, then a + count), and the **Edit** and **Remove** buttons. A video card also shows the video's length on the thumbnail once it is ready.

6 Click the thumbnail to preview

You see: PDFs and pictures open in a **Preview** window. Excel files open in Excel on Windows, or download. Word and PowerPoint files open in a new tab or download. Videos play in a preview player once they are ready.

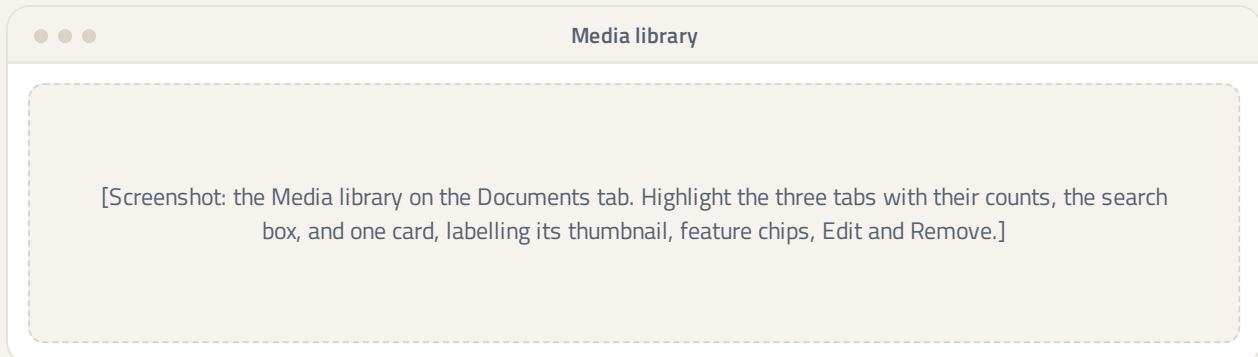


Figure 3 — The Media library, Documents tab

Walkthrough: add a file

1 Choose the right tab

Click the tab for the kind of file you are adding. The tab decides which files you can pick.

2 Click + Add

It is at the bottom right.

You see: a window titled **Add Document**, **Add Image** or **Add Video**. On the left: **Name**, **Description** and an upload box. On the right: **Link to Feature**.

3 Choose the file

Click the **Upload a file** box and choose a file from your computer.

You see: the file's icon and name, its size, and **Thumbnail will be generated on save** (pictures and PDFs) or **Thumbnail not available**. Under the box, before you choose, is a hint such as **PDF, Word, Excel or PowerPoint** and **Max 10MB**.

4 Check the Name

If it was empty, the product fills it in from the file name. Change it to something people will recognise.

5 Optional: add a Description

The library search looks at name and description, so useful words here help people find it.

6 Tick the areas in Link to Feature

Tick every area where this file should be offered. Use the **Filter** box to find an area by name.

You see: a tree of product areas, opened at **People > Person > Core**. Each top group shows a count of ticked areas, such as **2/31 items** under **People**.

7 Click Create

You see: a message such as **Document has been created successfully.**, and the new card first in the list. A new video card shows a moving status chip, **Queued** then **Preparing**. When the video is ready the chip disappears and the video can be played. This updates by itself.

If something is missing, the window stays open and explains why: **Name is required.**, **File is required.** or **At least one feature must be selected.**

Some files are refused as soon as you pick them. A file that is too big shows **File size exceeds the maximum of 10MB**. An empty file shows **File is empty**.

The product also checks what the file really is, not just its name. A file renamed to look like a PDF or a picture is refused when you click **Create**, with **File type signature not recognised**.

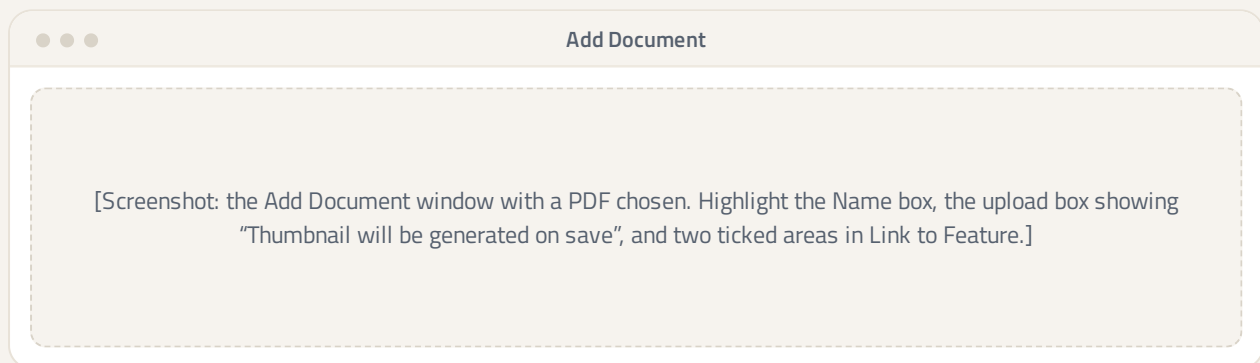


Figure 4 — Adding a document to the Media library

Walkthrough: use a library file somewhere else

1 Click Choose from Media Library

In a feature that accepts files, it sits beside **Upload a file**, for example in a Social feed post or when adding a document to a person's record.

You see: a window titled **Select Media Item**. It lists only items linked to the feature you are in, and only the right kind (for example only images when adding an image).

2 Pick the item

Tick the item you want and click **Apply**, or double-click it.

3 If the file is not listed, link it

Click **Manage Media Library** to open the library, then edit the item and tick this feature in **Link to Feature**.

NOTE

When a library file is added to a person's record, a Social feed post or an employment policy task, that place keeps its own copy. Changing or removing the library item later does not change what was already added. Workflow templates are the exception: they keep a live link to the item.

Walkthrough: edit, replace or remove

1 Click Edit on a card

You see: **Update Document** (or Image, or Video) with the current details filled in.

2 Change the details

Change the name, description or linked features as needed.

3 Optional: swap the file

Click the upload box (it says **Click to replace**) and choose the new file. A replaced video is processed again, and a new thumbnail is made.

4 Click Update

You see: **Document has been updated successfully**. If a workflow template needs one of the links you removed, the save is refused with **The following workflows use this media item and need the ... scope: ...**

5 To delete an item, click Remove on its card

You see: **Wait a second!** and **You are about to permanently delete this Document. This cannot be undone.** with **Cancel** and **Delete**.

6 Click Delete

You see: **Document has been deleted successfully.** and the tab count goes down by one.

If **Remove** is greyed out, either the user has no Delete permission, or the item is used by a workflow template. Hover over the button: when templates use it, a tip lists them, for example **This media item is in use with the following workflows: ...**

Limits at a glance

WHAT	LIMIT	NOTES
Media library document	10 MB	PDF, Word (.doc, .docx), Excel (.xls, .xlsx), PowerPoint (.ppt, .pptx)
Media library image	1 MB	JPEG, PNG or WebP
Media library video	450 MB	MP4, MOV or WebM, roughly 10 minutes
Media item name	255 characters	Required
Media item description	2,000 characters	Optional
Linked features	1 or more	Required
Library page size	50 cards	Use the page arrows for more
Document search results	50	Best matches only, about 25% match or better
Document search text	500 characters	Required before searching
File links (Open, previews)	1 hour	After that, press Refresh or reopen

Table 4 — Limits at a glance

How it connects to other features

- **Person records:** the source of everything Document search finds. A document must be added to a record area first. From Document search you can jump back to that record with the person's name, **View** or **Edit**.
- **Leave planner and fit notes:** documents on leave entries, including fit notes, are searchable under **Leave entry** and **Fit note**. Employees can send fit notes from the ESS app when their ESS policy allows it, and those then become searchable too.
- **Application policies:** decide which categories a user sees in Document search, which people's documents they see (through the Employee Filter), and what they can do in the Media library.
- **Queries:** the AI assistant in the main menu can also search documents, using the same rules about which categories and which people a user can see.

- **Social feed:** the post composer's **Choose from Media Library** offers items linked to **Social feed**. Videos for posts can only come from the library.
- **Adding documents to a record:** **Choose from Media Library** offers items linked to that record area, for example **Right to work**.
- **Employment policies and workflow templates:** can use library files, such as the three standard forms. An item used by a workflow template cannot be removed.
- **The ESS app:** employees meet library files inside things they are shown, such as a Social feed post.

Things to be aware of

- **Two separate searches.** Document search looks inside person documents. The Media library search looks only at item names and descriptions. Neither searches the other.
- **Nothing happens until Enter.** In both searches the user must press Enter or click the magnifying glass. The words **Press enter** are the clue.
- **Which people are shown.** Document search follows both parts of the user's application policy: the Read switches decide the categories, and the Employee Filter decides the people. A user limited to one site only finds documents for people at that site. The Queries assistant works the same way.
- **Removed documents.** The search index is not told when a document is removed from a record, so it can keep appearing in results. **Open** then fails, because the file itself has been deleted.
[Check: whether the platform team clears old entries from the search index, and how often.]
- **Excel is not searched.** Spreadsheets on records never appear in Document search. The Media library still stores Excel files.
- **Links expire.** The file links behind **Open** and previews last one hour. If the window has been open longer, press **Refresh**.
- **Upload Files is a separate switch.** A policy with Create but not Upload Files on Media library cannot add anything, because the upload box is hidden.
- **The tab decides the file type.** To add a video, start on the **Videos** tab. The file picker only offers files that suit the tab you are on.
- **Pictures are small.** Library images must be 1 MB or less, even though documents can be 10 MB.
- **Files are checked.** Empty files, and files whose contents do not match their type, are refused.
- **Videos need time.** A new or replaced video cannot be played or added to a post until it is ready. The **Queued** and **Preparing** chip shows while it is being prepared. If the chip disappears but the video still will not play, upload it again.
- **Link to Feature controls pickers.** An item not linked to a feature is not offered there. Some menu items, such as **Media library** and **Conversation hub**, are not on the list because they do not take library files.
- **Service dependency.** Document search relies on a separate search service. It is now set up automatically as part of the live service, and it is shared by every customer, with each company's documents kept apart. If it cannot be reached, users see **Document search is unavailable right now. Please try again later.** [Check with the platform team that document search has been tested end to end on the live service.]
- **After permission changes,** the user should log out and back in.

Common support questions

"I click Document search and type a word, but I get a message instead of results."

If the message is **You do not have sufficient permissions to access this item.**, their policy lacks the Document search permission. It cannot be switched on from Application policies today, but the standard **Everything** policy has it. Escalate if a customer needs it on a custom policy.

If the message is **Document search is unavailable right now. Please try again later.**, the search service could not be reached. Ask them to try again later, and escalate if it keeps happening.

"My colleague can find a document I can't."

Check two things on each user's policy. First, categories follow the Read switch on each person row: if you cannot read, for example, **Salaries**, salary documents never appear for you. Second, the Employee Filter decides whose documents you see. Compare the two users' policies on Application policies, then log out and back in after any change.

"I uploaded a document to a record a minute ago and search can't find it."

New documents are picked up every five minutes. Wait five minutes and search again. Also check it is not an Excel file or a driving licence document, which are not searched.

"Search brings back documents that don't contain my exact word."

Document search matches meaning as well as words. The match percentage shows how close each result is. Try more specific words, or choose one category.

"Why can I only see 50 results?"

Document search shows the best 50 matches. Add more words, or pick a category, to narrow it down.

"The Open button gives an error."

File links last one hour. Press the round **Refresh** button at the bottom left of the window, or close and search again. If it still fails, the document may have been removed from the record since it was indexed.

"There's no upload box when I add something to the Media library."

The policy needs Upload Files on **Key features > Media library**, as well as Create.

“My picture won’t go into the Media library.”

Images must be JPEG, PNG or WebP and no bigger than 1 MB. Make sure you are on the **Images** tab when you click **+ Add**. If the message is **File type signature not recognised.**, the file is not really the type its name says; save it again as a real JPEG or PNG.

“I can’t find our handbook when I click Choose from Media Library.”

The picker only shows items linked to the feature you are in. Edit the item in the Media library and tick that feature in **Link to Feature**.

“Why is Remove greyed out?”

Either the policy has no Delete switch for Media library, or a workflow template uses the item. Hover over the button to see which templates.

“If I replace a file in the library, do the copies on records and posts update?”

No. Records, posts and employment policy tasks keep the copy they were given. Only workflow templates follow the library item.

Try it yourself

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

1 Count what is in the library

Open the Media library and note the count on each tab. Find the three standard forms on the **Documents** tab and preview one.

2 Try the image limit

On the **Images** tab, try to add a picture larger than 1 MB and read the message. Then add one under 1 MB, linked to **Social feed**.

3 Make your image findable

Edit your image: add a description containing the word "training", then find it by searching the library for "training".

4 Search for a person

Open Document search, set the category to **All**, and search for a surname you know is in the demo data. Open one result with **View** and one with **Open**.

5 Compare all categories with one

Search again for a word you would expect inside a right to work document, such as "passport". Then set the category to **Right to work** and compare the counts.

6 Tidy up

Remove your test image and check the **Images** count goes down.

TIP

Check your understanding. A customer says their payroll clerk can open Document search but never sees salary documents. What would you check first?

Answer: Read on **People > Person > Employment and compensation > Salaries** for the clerk's policy, and that the Employee Filter includes the people they expect. Then ask them to log out and back in.