
TRAINING GUIDE

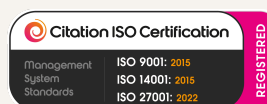
Level 1 Queries

How to ask questions about a company's people and workforce data in plain English, read the answers, and find earlier queries again in timeware® HRMS.

PRODUCT	REFERENCE	VERSION
timeware® HRMS	t2-1045	v1.0

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What this covers

This is the Level 1 guide to Queries, the AI assistant in the web version of timeware HRMS. By the end you will be able to:

- open Queries and ask a question in your own words
- read what comes back: a sentence, a table, a chart or buttons that open records
- copy an answer or export it to Excel
- find, rename and delete earlier queries
- explain who can use Queries, what it can see, and the daily limits.

Why it matters

Managers and HR teams often need a quick fact: who is off today, how many people work at a site, which timesheets still need checking. Finding it normally means opening a page, setting filters and reading a list. Queries lets them type the question instead, for example "Who is off today?", and get the answer in a few seconds.

Queries only reads data. It never changes a record. It uses the same permissions as the rest of the product, so each person only gets answers about the people and the areas they are already allowed to see.

Key terms

TERM	WHAT IT MEANS
Queries	The AI assistant that answers questions about the company's data. It opens in a panel on the right of the screen, over the page you are on.
Query	One conversation in Queries: a question, its answer, and any follow-up questions. Each query is saved with a title so you can open it again.
Query History	The list of your saved queries. You can search it, rename a query or delete it.
Starter questions	Ready-made questions shown under Try asking when a query is empty. They change with the page you are on.
Record buttons	Buttons under an answer that open a leave booking, a shift or a timesheet it mentions, for example Sam Jones 15 Jan .
Follow-up suggestions	Buttons under the latest answer with a sensible next question. Clicking one asks it for you.
Daily limits	How many questions can be asked each day. Each person has a daily limit, and the whole company shares a daily pool.
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. Queries follows it.
Read, Create, Update, Delete	The switches on each row of an application policy. Read means "can see", Create "can add", Update "can change" and Delete "can remove".

Table 1 — Key terms

What permissions are required

Most “Queries isn’t working” calls come down to access or the daily limits. Use this table first. The row name is exactly as it appears in **Configuration > Advanced > Application policies**.

THE USER WANTS TO...	THEY NEED
See Queries at all	Read on Key features > Queries . Without it, the Queries link in the main menu shows a padlock (pointing at it shows No access), and the Queries tab on the edge of the screen is not shown.
Start a new query	Create on Queries.
Ask questions and get answers	Update on Queries. Sending a question counts as changing the query, so a policy with Read and Create but no Update cannot get an answer.
Rename a saved query	Update on Queries.
Delete a saved query	Delete on Queries.
Get answers about a topic	Read on the matching row, for example Leave planner for leave questions or People > Person > Employment and compensation > Salaries for pay. Queries only uses the topics the policy can read.
Get answers about particular people	Those people must be inside the Employee Filter on the user’s policy. Queries leaves everyone else out.

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.

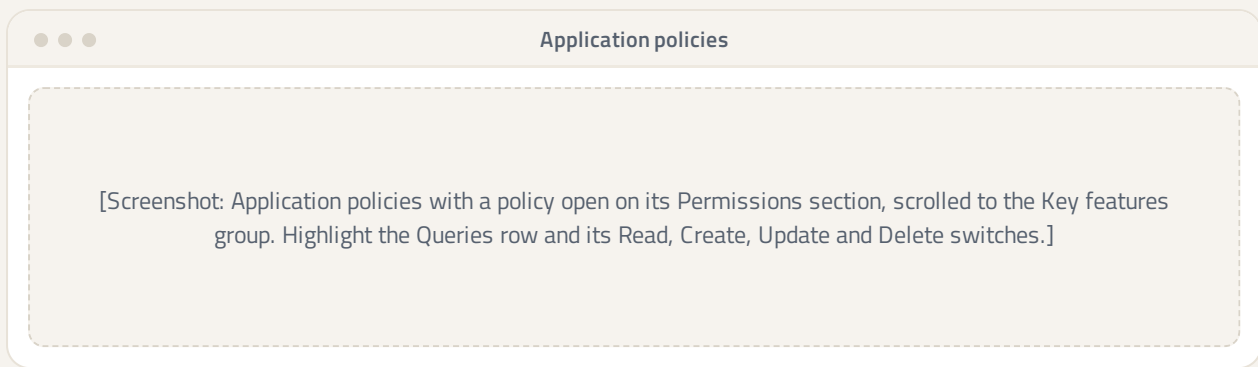


Figure 1 — The Queries row on an application policy

ASKING QUESTIONS

How it works: Queries

Queries is always one click away. It opens as a panel on the right of the screen, on top of whatever page you are on. You type a question in plain English, and Queries looks up the answer in the company's live data.

It knows where you are. If you have a person's record open, you can ask about "this employee" and Queries knows who you mean. The starter questions change too, for example to that person's leave balance.

Walkthrough: open Queries and ask a question

1 Open Queries

Click the small tab with a sparkle icon on the right-hand edge of the screen, halfway down. Or open the main menu and click **Queries** in the row of links along the bottom.

You see: the Queries panel slides in from the right. The heading reads **Queries**. The middle says **Start a query** and **Ask a question to begin**.

2 Pick a starter question, or type your own

Under **Try asking**, click a starter question such as **Who is off today?**. Or click in the **Type your query...** box and type a question, for example "How many people work in the Warehouse?".

You see: as you type, a counter such as **42 / 4000** shows how many characters you have used.

3 Send the question

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

You see: your question on the right, then a working message on the left, such as **Searching...** or **Checking who is on site....** The query now has a title, taken from your question, under the **Queries** heading.

4 Read the answer

The answer appears word by word. Short facts come as one sentence. Lists of three or more come as a table. Names are links: click one to open that person's record.

5 Use the buttons under the answer

Depending on the question you may see record buttons, which open a leave booking, shift or timesheet, and follow-up suggestions, which ask a sensible next question for you. If your question could mean more than one thing, Queries shows a few buttons to choose from instead of guessing.

6 Ask a follow-up

Type another question in the same box, for example "Just the Sales team". Queries remembers the conversation, so you do not need to repeat yourself.

7 Start a fresh query for a new topic

Click **+ New Query** at the top of the panel.

You see: the empty screen again, with **Try asking** and, below it, **Recent chats** showing your two latest queries.

8 Close Queries

Click the tab again, press Esc, or click the page outside the panel. Your query is saved and is still there when you reopen Queries.

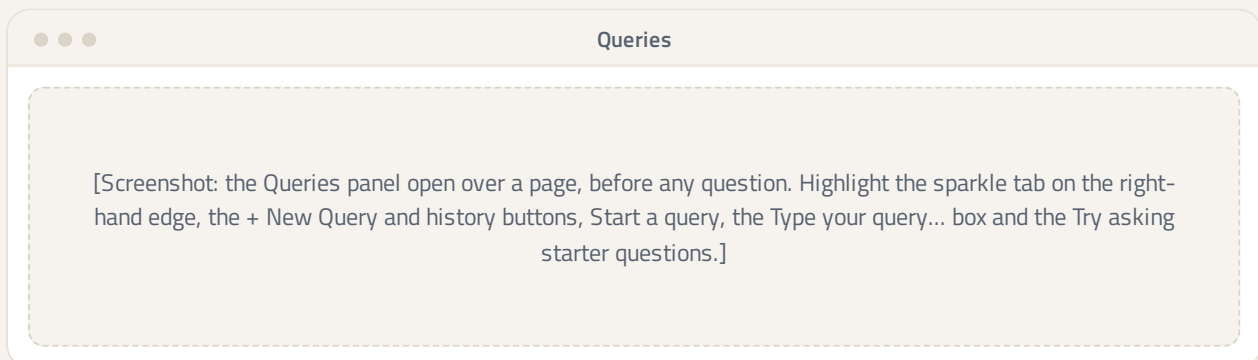


Figure 2 — The Queries panel, ready for a question

What an answer can include

- **Text and tables.** The answer itself, with names linked to each person's record.
- **Charts and headline figures.** For comparisons and trends, such as absence by month, Queries adds a chart or a row of figures under the answer. They look and work like the charts on the Workforce dashboard.
- **Record buttons.** When the answer lists leave bookings, shifts or timesheets, buttons such as **Sam Jones 15 Jan** open that record in its own window, on top of Queries.
- **Follow-up suggestions.** Buttons with a next question, shown under the latest answer only.
- **Its reasoning.** Above some answers, a **Thinking** line shows how Queries worked it out. Once the answer is finished it reads, for example, **Thought for 4 seconds**. Click it to show or hide the reasoning.
- **The time, and two small buttons.** **Copy** copies the answer as text. **Export to Excel** appears only when the answer has a table, a chart or headline figures.

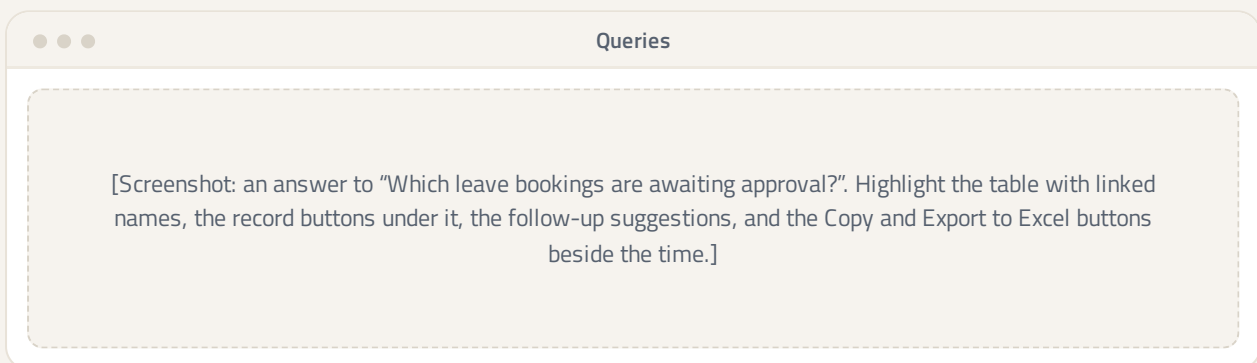


Figure 3 — An answer with a table, record buttons and follow-up suggestions

Walkthrough: copy or export an answer

- 1 Find the answer**
Scroll to the answer you want. The buttons sit under it, beside the time it was given.
- 2 Copy it**
Click the **Copy** button (the copy icon).
You see: Copied to clipboard. You can now paste the text into an email or a document.
- 3 Or export it to Excel**
Click the **Export to Excel** button (the Excel icon).
You see: an Excel file downloads, named after the query. It holds the answer's headline figures, its charts and its tables, exactly as they were shown. Nothing is looked up again.

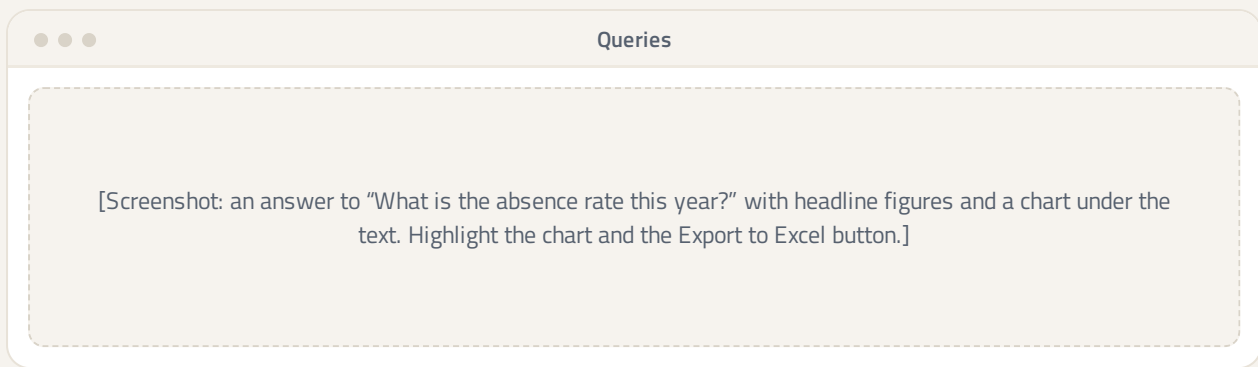


Figure 4 — An answer with headline figures and a chart

Walkthrough: find, rename or delete an earlier query

1 Open Query History

Click the history button beside **+ New Query**.

You see: a list of your queries, newest first, each with its title and the date it was started. A **Search queries...** box sits at the top. If there are more, **Load more** appears at the bottom.

2 Find a query

Type a word from its title in **Search queries....** The list narrows as you type.

3 Open it

Click the query.

You see: the whole conversation, with its tables and charts. You can carry on asking questions in it.

4 Rename it

Point at the query and click **Rename** (the pencil). Type the new title and press Enter.

5 Delete it

Point at the query and click **Delete** (the bin).

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

6 Confirm

Click **Delete**.

You see: **Chat has been deleted successfully.** and the query leaves the list.

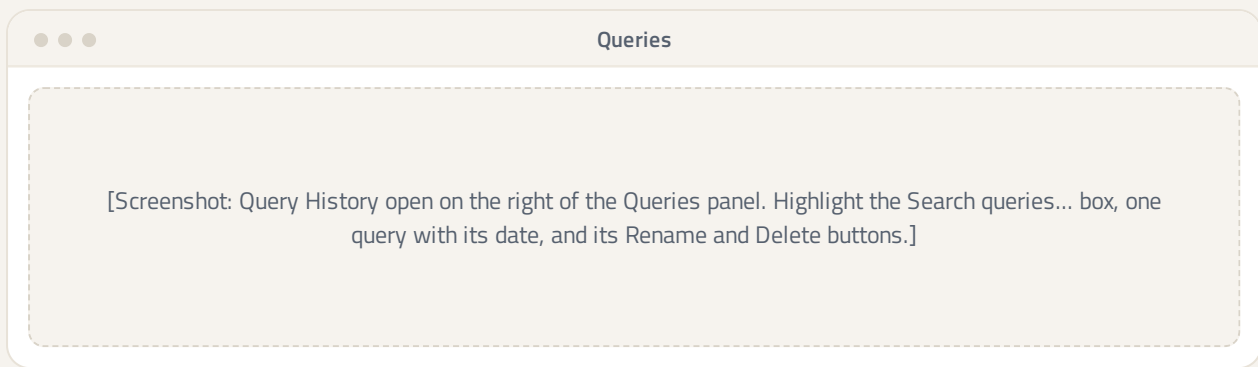


Figure 5 — Query History

What you can ask about

Queries can answer questions across most of the product. It only uses the topics the user's policy can read, and only for the people inside their Employee Filter. Most answers cover current employees; leavers appear in starters, leavers and turnover questions.

TOPIC	EXAMPLE QUESTION
People and the organisation	"How many employees do we have?" "Who reports to Sam Jones?"
Starters, leavers and service	"Who has started in the last 30 days?" "Whose probation ends this month?"
Leave and absence	"Who is off today?" "Which leave bookings are awaiting approval?" "What is the absence rate this year?"
Time and attendance	"Which timesheets are waiting for review?" "Show unallocated clockings."
Roll call and fire safety	"Who is on site now?" "When was the last fire drill?"
Training and compliance	"Whose right to work checks are due?" "Who has not completed their compulsory training?"
HR work	"What HR tasks are overdue?" "Which follow-ups are due this week?"
Pay and benefits	"What is the average salary in Finance?" (only with Read on Salaries)
Incidents and cases	"How many accidents were there this year?" "How many open grievances are there?"

TOPIC	EXAMPLE QUESTION
Documents	"Find documents that mention a passport."

Table 3 — Topics Queries can answer, with example questions

Limits at a glance

WHAT	LIMIT	NOTES
Questions per person	200 a day	[Check: that these daily figures are the ones to quote to customers.]
Questions for the company	A shared daily pool	At least 100 a day, or half a question per licensed live employee if that is more
When the day resets	Midnight UTC	That is 1am UK time during British Summer Time
Messages in one query	100	Questions and answers both count, so about 50 questions
Length of one question	4,000 characters	The counter under the box shows how many you have used
Speed	About 10 a minute	Faster than that shows a "too quickly" message

Table 4 — Limits at a glance

How it connects to other features

- **Application policies:** the Queries row decides who can use Queries. The other rows decide which topics each user gets answers about, and the Employee Filter decides which people.
- **Person records:** names in answers link to the person's record. With a record open, Queries knows who "this employee" is.
- **Leave planner and Timesheets:** record buttons under an answer open the leave booking, shift or timesheet in the same window those pages use.

- **Workforce dashboard:** charts and headline figures in answers use the same style as the dashboard's charts.
- **Document search:** Queries can also find documents on people's records, using the same rules about which people a user can see.
- **Other AI helpers:** the **Suggest** button on some personnel forms and **Suggest a reply** in the Conversation Hub count towards the same daily limits as Queries.

Things to be aware of

- **Queries only reads.** It cannot book leave, change a record or send a message. To make a change, open the record, for example with a record button.
- **Everyone sees different answers.** Two people asking the same question can get different numbers, because each answer follows the asker's own policy and Employee Filter.
- **Queries are private.** Each person only sees their own queries in Query History. Nobody else can open them in the product, including an administrator.
- **Check important figures.** Answers come from live data, but they are written by AI. For anything important, check the figure on the page it comes from.
- **Some personal details are kept out.** Queries never uses ethnic origin, religion, sexual orientation, gender identity or trade union membership, whatever the user's permissions. It points the user to the person's **Sensitive** or **Unions** page instead.
- **Asking for a file.** If you ask Queries in words to export or email something, it says it can only show the data here. Use **Export to Excel** under the answer instead.
- **Warnings near the limits.** When 80% of the day's questions are used, a line such as **20 queries remaining today** appears above the box. It counts down whichever runs out first, the person's own limit or the company pool.
- **When the day's questions run out,** the box is greyed out and says **You've reached your daily query limit. Please try again tomorrow.** or, if the company pool is used up, **Your organisation has reached its daily AI allowance. Please try again tomorrow.** A line above it says when it resets, for example **AI allowance used up. Resets in 3h 12m.**
- **Long queries.** Near the end of a query a line such as **10 queries remaining** appears. This counts questions and answers, so it drops by two for each question. **[Check: that counting answers in this number is intended.]** At the limit it says **You've reached the query limit for this conversation. Please start a new one to continue.**
- **Very long conversations.** In a long query, Queries looks back over the most recent part only. For a new topic, click **+ New Query**. The **context used** figure under the box shows how full the query is.
- **You can type while it works.** While an answer is on its way, the box says **Type your next query while waiting....** The send button becomes a stop button: click it to stop the answer.
- **If something goes wrong,** the answer is replaced by a warning such as **Could not connect to the AI assistant. Please try again.** with a **Try again** button that asks the same question again.
- **How long queries are kept.** Saved queries stay in Query History until the user deletes them. **[Check: whether saved queries are ever cleared automatically.]**
- **Where the data goes.** Customers sometimes ask how their data is handled when they use Queries. **[Check: the agreed wording for questions about where Queries processes data.]**

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

Common support questions

“I can see Queries in the menu, but it has a padlock.”

Their policy has no Read on **Key features > Queries**. Their administrator can switch it on under Application policies. The user should then log out and back in.

“I can start a query, but my question never gets an answer.”

Check that the policy has Update on Queries as well as Read and Create. Sending a question needs Update.

“My colleague gets a different number for the same question.”

That is expected. Each answer follows the asker’s policy: the rows they can read, and the people inside their Employee Filter. Compare the two users’ policies on Application policies.

“Queries says it can’t answer my question about pay.”

The user’s policy cannot read that area, for example Salaries. Queries only answers about what the user could see on the page itself.

“It says I’ve reached my daily limit.”

The person has used their questions for the day, or the company pool is used up. The line above the box shows when it resets, at midnight UTC.

“It says I’m sending questions a little too quickly.”

Queries takes about 10 questions a minute from each person. Wait a moment and click **Try again**.

“Where have my old queries gone?”

Click the history button beside **+ New Query** to open Query History, and search by a word from the title. Queries are private, so a colleague cannot see them.

Try it yourself

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

1 Ask a starter question

Open Queries and click one of the **Try asking** questions. Read the answer, then open one of the names it links to.

2 Ask your own question

Click **+ New Query** and type "Who is off this week?". Then ask a follow-up, such as "Just the Warehouse".

3 Open a record from an answer

Ask "Which leave bookings are awaiting approval?". Click one of the record buttons under the answer and close the booking window again.

4 Get a chart and export it

Ask "Show absence by month this year as a chart". Click **Export to Excel** and open the file.

5 Ask about a person

Open a test employee's record, then open Queries. Click the starter about their leave balance.

6 Tidy up

Open Query History, rename one of your queries to "Training practice", then delete it.

TIP

Check your understanding. A site manager says Queries tells her there are 40 employees, but head office says the company has 400. Nothing is broken. What would you check first?

Answer: the Employee Filter on the site manager's policy. If it only covers her site, Queries only counts the people at her site. Each answer follows the asker's own policy.