
TRAINING GUIDE

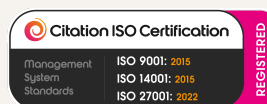
Level 1 timeware® Self-Service App

What employees can do in the timeware app on their phone, how they get invited and sign in, and how support can help when something is missing.

PRODUCT	REFERENCE	VERSION
timeware® HRMS	t2-1060	v1.0

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What this covers

This guide covers the Self-Service App, the phone app that employees use alongside the web version of timeware HRMS. By the end you will be able to:

- invite an employee to the app, resend an invitation and revoke access
- walk an employee through registering, signing in, and setting up a PIN or Face ID or fingerprint
- explain the **Home**, **Feed**, **Admin** and **Settings** tabs
- explain what each tile on the Home tab does, including leave, timesheets and clocking
- explain notifications and blocked colleagues
- work out which ESS policy an employee has, and why a tile is or isn't showing.

Why it matters

The app puts everyday tasks in the employee's pocket. They can clock in and out, request leave, check their balance, see their shifts and timesheet, and message their manager, without needing a computer or a web login.

Most calls about the app are one of three things: the employee can't get in, a tile they expect is missing, or a notification didn't arrive. Almost every "I can't see X" call comes down to the employee's **ESS policy**, so this guide spends time on how that works.

Key terms

TERM	WHAT IT MEANS
The app	The Self-Service App. On the phone its icon is called timeware . Inside, some screens call it ESS, short for Employee Self-Service.
Invitation	The email that lets an employee register. It gives them a Tenant and a Username .
Company Code	The code that tells the app which employer to connect to. The invitation email calls it Tenant . They are the same thing.
Username	The employee's app login, normally their first name and surname in lower case with a dot, such as sam.jones . A number is added if the name is already taken.
Verification code	A 6-digit code sent by email or text message to prove the employee is who they say they are.
App lock	An optional PIN, or the phone's Face ID or fingerprint, that the employee uses to open the app.
App access	The panel on a person's Insights page in the web version. It shows whether they are Not invited , Invited or Active .
Tile	A row on the app's Home tab that opens a feature, such as Leave or Timesheet .
ESS policy	A set of settings that decides which tiles and tabs an employee sees in the app. Managed in the web version under Configuration > People > ESS policies .
Clocking point	Something the app clocks against: an NFC tag (a small puck on a wall) or a site location.
Application policy	A set of permissions for web users, sometimes called a role. It controls what office staff can do, such as inviting people to the app. It does not control what employees see in the app.

Table 1 — Key terms

What permissions are required

There are two sides to this. Office staff use the web version to invite people and set up ESS policies, and that is controlled by Application policies. Employees use the app, and what they see is controlled only by their ESS policy.

In the web version

TASK	APPLICATION POLICIES ROW	SWITCH
See the App access panel on a person's Insights page	ESS invitations (see the note below)	Read
Invite to app, or resend an invitation	ESS invitations (see the note below)	Create
Revoke access	ESS invitations (see the note below)	Delete
See the App invitations alert on the dashboard	People > Person > Core > Essential, and ESS invitations	Read on both
Look at ESS policies	People > Configuration > ESS policies	Read
Add, change or delete an ESS policy	People > Configuration > ESS policies	Create, Update, Delete
Choose a person's ESS policy	People > Person > Employment and compensation > Employment	Update

Table 2 — Web permissions for app tasks

NOTE

Inviting, resending and revoking use a permission called ESS invitations. [Check: no row on Application policies grants "Invite to app" or "Revoke access" (ESS invitations Read, Create and Delete). It is not clear how a customer's administrator switches these on for their staff.]

In the app

Employees don't need an Application policy. Each tile and tab appears only when a box is ticked on the employee's ESS policy. The box names below are exactly as they appear on the ESS policy in the web version.

IN THE APP	ESS POLICY BOX THAT MUST BE TICKED
Clock in or out card, My clockings tile	Clocking
Offsite button on the clocking card	Clocking and Allow offsite clocking
Leave tile	Leave requests or Leave balances
Request leave button	Leave requests
Add a fit note	Allow fit note uploads
Timesheet tile	Timesheet
Shift rota tile	Schedule
Available shifts tile	Shift marketplace and Schedule
Shift swaps and give-aways tile	Schedule and at least one of Allow shift swaps, Allow employees to give away their shifts or Allow employees to take a colleague's shift
My training tile	Show training
Mileage tile	Enable mileage claims
Visitors tile	Enable visitor booking
Feed tab, and Blocked colleagues in Settings	Social feed
Admin tab	Allow NFC tag assignment from the app
Conversations tile, notifications bell, Settings tab	None. Everyone with the app sees these.

Table 3 — Which ESS policy box shows each part of the app

How it works: getting into the app

An employee can't sign up on their own. Someone in the office invites them from the web version first. The invitation creates their username and emails it to them, along with the Company Code. They then download the app and register.

Walkthrough: invite an employee (web version)

1 Open the person's Insights page

Open the person's record and go to **Core > Insights**.

You see: an **App access** panel with a **Status** of **Not invited**, **Invited** or **Active**.

2 Check they have a work email

The invitation goes to the person's work email. If there isn't one, the panel says **Add a work email to invite this employee**, instead of showing a button. Add the work email to their record first.

3 Send the invitation

Click **Invite to app**.

You see: **Invitation sent**. The status changes to **Invited**, and the panel now shows their **Username** and the date they were **Invited**.

4 Tell the employee what to look for

The email is headed **You've been invited to Employee Self-Service**. Under **Your registration details**: it shows a **Tenant** and a **Username**. They need both to register.

5 Resend if it didn't arrive

While the status is **Invited**, click **Resend invitation**. The same username is sent again.

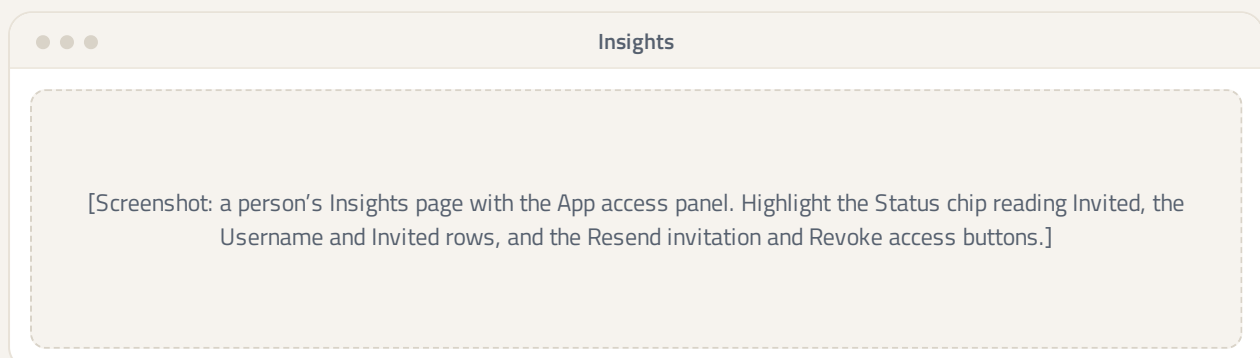


Figure 1 — The App access panel on a person's Insights page

NOTE

To invite many people at once, use the **App invitations** alert on the dashboard, for example **12 employees not using the app**. Click **Review** to see who has **Never invited** and who is **Awaiting sign-up**. Tick the people you want and click **Send**. People with **No work email** can't be ticked. **[Check: whether the App invitations alert is on customers' dashboards by default.]**

Walkthrough: register in the app for the first time

1 Install the app

Download it from the App Store or Google Play. On the phone the icon is called **timeware**. **[Check: the app's name as it appears in the App Store and Google Play.]**

2 Open it and choose Register

The app opens on the **Sign In** screen. Under **Don't have an account?**, tap **Register**.

You see: **Welcome to ESS** and **Enter your company code and username to get started**.

3 Enter the Company Code and Username

In **Company Code**, type the **Tenant** from the email. The box may already say **demo**: delete that first. In **Username**, type the username from the email. Tap **Continue**.

4 Choose where to get the code

You see: **Verify Your Identity** and **How would you like to receive your verification code?**. The choices are **Work Email**, **Work Mobile**, **Personal Email** and **Personal Mobile**, but only the ones on the person's record appear, each partly hidden. Pick one and tap **Send Code**.

5 Enter the code

You see: **Complete Registration**, with **Enter Verification Code** and **We sent a code to the chosen address or number**. Type the 6-digit code. If it didn't come, wait for **Didn't receive a code? Resend**.

6 Create a password

Under **Create Your Password**, type a password of at least 12 characters, type it again in **Confirm Password**, and tap **Complete Registration**.

7 Choose how to lock the app

You see: **Secure Your Account**. Switch on the phone's biometric option (named after the phone, for example **Face ID** or **Fingerprint**) and, if wanted, **PIN code** (**Set a 4-6 digit PIN as backup**). Tap **Continue**, or **Skip for now**.

8 Start using the app

You see: the Home tab. In the web version, the person's App access status is now **Active**.

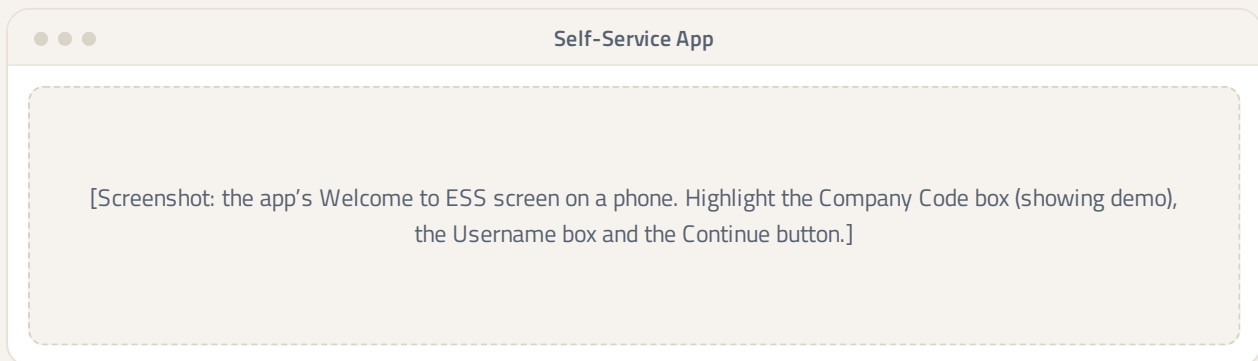


Figure 2 — Registering: Company Code and Username

Walkthrough: sign in again, unlock, or reset a password

1 Open the app

If the employee is still signed in and set up a lock, the phone asks for Face ID or a fingerprint. If that isn't used or doesn't work, they see **App is locked** and **Enter your PIN**. If they chose no lock, the app goes straight to Home.

2 Sign in when asked

After signing out, or if the app asks, they see **Welcome back** and **Sign in with your ESS account**. They enter **Company Code**, **Username** and **Password**, and tap **Sign In**.

Some companies sign in with Microsoft or Google instead. Once the Company Code is in, the screen shows **Sign in with Microsoft** or **Sign in with Google**, with **Sign in with a Reach password** for staff without a work account.

3 Reset a forgotten password

Tap **Forgot Password?**. On **Reset Password**, enter the **Company Code** and **Username or work email**. Choose where to get a code, enter it, and type a new password under **Choose a new password**.

4 Switch to someone else's account

On the locked screen, tap **Use a different account**. This signs the current person out.

How it works: using the app

Along the bottom of the app (or down the side on a tablet) are the tabs. Most employees see three: **Home**, **Feed** and **Settings**. People who look after clocking points also see **Admin**, between Feed and Settings. Tabs and tiles that the ESS policy switches off are simply not there.

The Home tab

From top to bottom, the Home tab shows:

- **A greeting and two round buttons.** For example **Good morning**, Sam. The bell opens **Notifications**, with a red number for unread ones. The circle with the person's initials opens **Settings**.
- **Warnings, when needed.** Such as **You are offline**, **Server unreachable**, or a note that NFC or location is switched off on the phone.
- **A fire alarm card, only during an evacuation.** For example **Fire alarm** at the employee's site, with **I'm at the assembly point**. The Roll Call guide (t2-1070) covers this.
- **The last clocking.** A small pill such as **Clocked in · 08:58** or **Last clocked · yesterday 17:02**.
- **The blue Clock in or out card.** With up to three buttons: **Tap a point**, **On site** and **Offsite**.
- **The tiles.** Each tile has a short line underneath that changes, such as the next shift or the next booked leave.

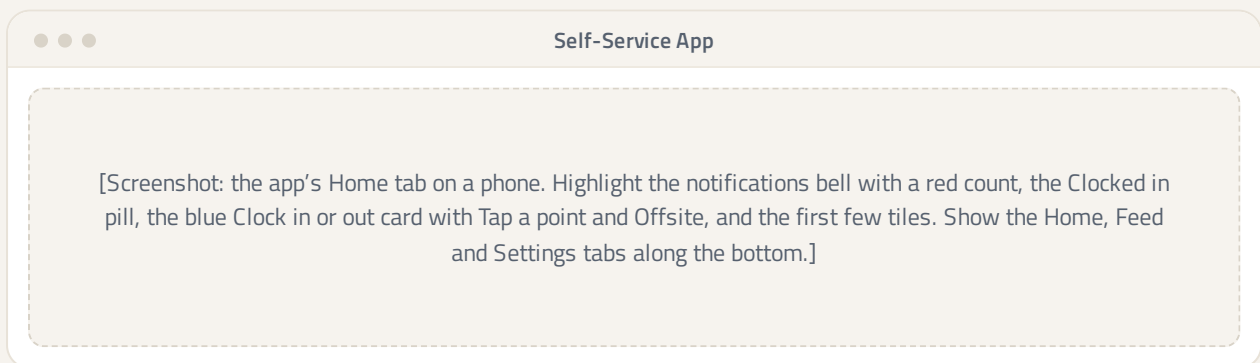


Figure 3 — The Home tab

The tiles, in the order they appear

TILE	WHAT THE EMPLOYEE CAN DO
Conversations	Raise a question with their manager or HR, and reply. A conversation can be about a timesheet shift, a timesheet, a leave entry, a course or My development . The line underneath shows new replies or open conversations.
My clockings	See their own clockings. Everything synced means every clocking has reached the office. Otherwise it shows how many are waiting, with a Sync button.
Leave	See leave balances, upcoming and past leave, request leave, cancel a request, and add a fit note to a sickness absence.
Timesheet	See their hours by pay period, the status of each period, each shift's clockings and anything flagged, such as Missed clocking .
Shift rota	See upcoming shifts. The line underneath shows the next one, such as Next: tomorrow · Early .
Available shifts	See spare shifts on offer, ask for one, and follow their requests under My shifts .
Shift swaps and give-aways	Offer to swap a shift with a colleague, give one away, or take one. Both employees agree, then a manager approves.
My training	See booked courses, course history and certificates, curriculum progress and skills, under Courses, Curriculum and Skills .
Mileage	Claim business mileage, and edit a claim until it is approved. Claims made with no signal are sent later.
Visitors	Book a visitor, log a walk-in, and mark visitors as arrived or left.

Table 4 — The Home tab tiles

The app has no separate documents tile. The documents an employee handles in the app are fit notes (under Leave), certificates (under My training) and any files attached to Social Feed posts.

Walkthrough: clock in or out

1 Choose how to clock

On the blue **Clock in or out** card, tap the button that fits. **Tap a point** is for NFC clocking points on the wall. **On site** uses the phone's location at a site. **Offsite** is for clocking away from any clocking point. Only the buttons the company uses are shown.

2 For Tap a point: hold the phone to the point

You see: **Ready to Scan** and **Hold your phone near the NFC clocking point**. On Android, holding the phone to the point while Home is open also works, without tapping the button first.

3 For On site or Offsite: add the clocking

On site opens **Clock at a site**: choose the site and check it says **You are at this site**. **Offsite** opens **Offsite Clocking**, with a **Comment** box that the policy may make required. Tap **Add clocking**.

4 Check it worked

You see: **Clocking recorded successfully**. With no signal, and if the policy allows it, **Clocking saved - it will sync when you are back online**. The pill on Home updates to the time of the clocking.

Walkthrough: request leave and check the balance

1 Open Leave

Tap the **Leave** tile.

You see: a card for each kind of allowance, such as **17 days left** and **Used 8 of 25**, then the employee's leave under **Upcoming** and **Past**, each with its status.

2 Start a request

Tap **Request leave** at the bottom of the screen.

3 Choose the kind of leave

Under **What kind of leave?**, tap **Choose a leave type** and pick one. Only the types the company allows in the app are listed.

4 Pick the dates

Set the **First day** and the **Last day**.

You see: **This request uses**, and, if the policy shows balances, **Balance now** and **Balance after booking**.

5 Add a note if needed

Some leave types need a reason (**Why are you requesting this leave? (required)**). Otherwise the note is optional.

6 Send it

Tap **Send request**.

You see: Request sent - your manager will review it. The leave shows as **Waiting for review**, and the employee gets a notification when it is decided.

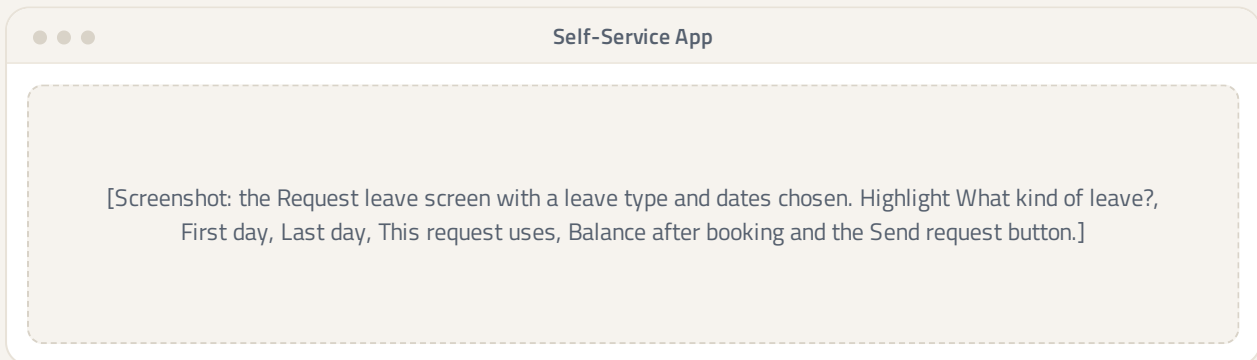


Figure 4 — Requesting leave in the app

To change their mind, the employee taps the leave to open it. An undecided request has **Cancel this request**, which cancels it straight away. Approved leave has **Ask to cancel this leave**, which asks the manager. **Ask about this leave** starts a conversation about it. On a sickness absence, **Add a fit note** lets them photograph a fit note and send it to their manager.

Notifications

The app can send notifications to the phone about conversations, leave decisions, training, mileage claims, visitors, spare shifts, shift swaps and fire alarms. Tapping one opens the matching screen.

- **The bell on Home** opens **Notifications**, a list of recent updates with the unread ones marked **Unread**. **Mark all read** clears the count.
- **Settings > Notifications** switches phone notifications on or off (**Get told about new messages and leave decisions**). **Delivery check** shows whether this phone can receive them.
- **Social Feed posts** don't send a notification. Instead, the **Feed** tab shows a number for new posts.

The Feed tab

The **Feed** tab shows the company's **Social Feed**: posts with photos, videos, documents, links and polls. Employees can react, vote and comment. Posting is done from the web version. The Social Feed guide (t2-1025) covers this in full.

Walkthrough: block and unblock a colleague

1 Open the comment's menu

In the comments on a post, open the menu on one of the colleague's comments and choose **Block** and their name.

2 Confirm

You see: Their comments will be hidden for you. They are not told. You can unblock them in **Settings**. Tap **Block**.

You see: **Blocked**. Their comments are hidden for you.

3 Unblock later

Go to **Settings > Social Feed > Blocked colleagues**. Each blocked colleague shows the date they were blocked. Tap **Unblock**.

You see: **Unblocked**. Their comments show again.

The Settings tab

SECTION	WHAT IS IN IT
Appearance	Theme (Auto , Light or Dark) and Language , with 15 languages including Welsh, Polish and Arabic.
Security	Face ID or fingerprint, PIN code , and Change PIN .
Notifications	Notifications on or off, and Delivery check .
Sounds	Clocking sounds : a sound when a clocking works or fails.
Social Feed	Blocked colleagues . Only when the Feed tab is on.
App	About timeware (version, who is signed in, the organisation, and support details) and Sign out .

Table 5 — The Settings tab

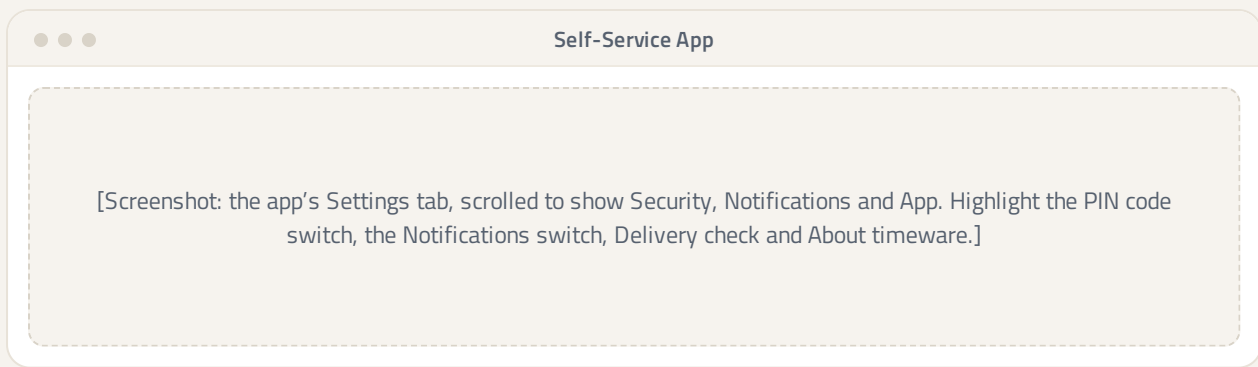


Figure 5 — The Settings tab

The Admin tab

The **Admin** tab is for the person who sets up NFC clocking points, such as a site manager. It lists the company's NFC clocking points, each showing its tag or **Not assigned**. To link a new tag, they tap a point, tap **Scan NFC tag**, hold the tag to the back of the phone, and confirm. **Tag assigned** and **This point is ready for clocking** mean it worked. The refresh button (**Refresh devices**) fetches the latest list.

How it works: the ESS policy

Every employee in the app gets exactly one ESS policy. The product picks it in this order, and uses the first one it finds:

- 1 The policy chosen on their employment**
On the person's employment, under Assignments, in **Employee app policy (ESS)**.
- 2 A policy linked to their organisation**
On the ESS policy's **Organizations** section. If more than one policy covers the organisation, the first in alphabetical order wins.
- 3 The company's default policy**
The ESS policy marked **Default**.
- 4 If there is none of these**
The app uses built-in settings: most tiles on, but **Available shifts**, **Shift swaps** and **give-aways** and the **Admin** tab off.

Walkthrough: find out why a tile is missing

- 1 Check which policy the person has**
Open the person's **Core > Insights** page. If a policy is chosen on their employment, it shows as **ESS policy**. If that row isn't there, they get their organisation's policy or the default.
- 2 Open the policy**
Go to **Configuration > People > ESS policies** and click the policy.

You see: **View ESS policy**, with sections down the left: **Features**, **Clocking**, **Shift swaps** and **give-aways**, **Leave**, **App security**, **Organizations** and **Comments**.
- 3 Find the box**
Use Table 3 to find the box for the missing tile. Most are under **Features > Shown in the app**.
- 4 Change it, if the customer asks you to**
Click **Edit**, tick the box and click **Update**.

You see: **ESS policy saved**. The change applies to everyone on that policy.

5 Ask the employee to reopen the app

The app reads its settings when it starts. Ask them to close the app fully and open it again. Signing out and back in also works.

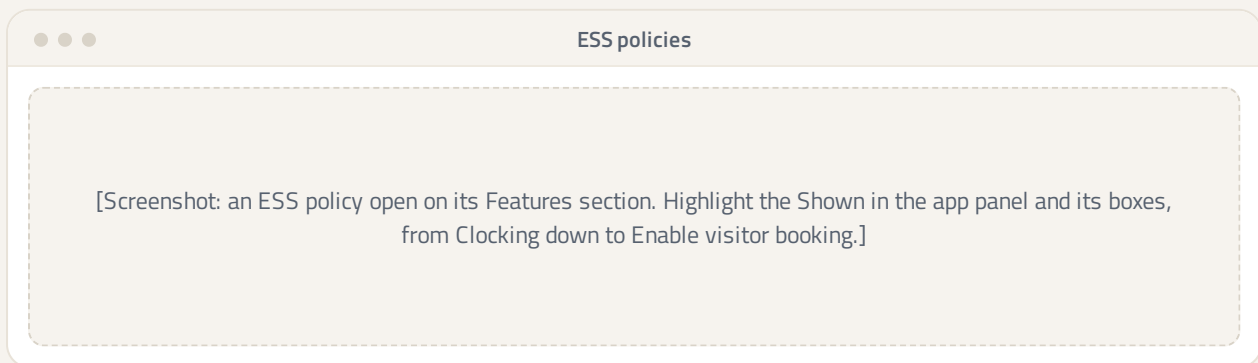


Figure 6 — The Features section of an ESS policy

Other settings on the policy that employees notice

- **Clocking:** Require location when clocking, Allow offsite clocking, Require a comment for offsite clocking, Allow employees to choose a cost center and Allow offline clocking.
- **Leave:** How far ahead leave can be booked (days), Allow fit note uploads and Allowed leave reasons. If no reasons are chosen, every reason set to show in the mobile app is allowed.
- **App security:** Re-lock the app after switching away (seconds). This only matters if the employee has set up a PIN or Face ID or fingerprint.

Walkthrough: revoke someone's app access

1 Open the App access panel

Go to the person's **Core > Insights** page.

2 Revoke

Click **Revoke access**.

You see: They will be signed out of the app and will need a new invitation to use it again.
Are you sure?

3 Confirm

Click **Revoke access** again.

You see: **App access revoked**. The status goes back to **Not invited**. To let them back in, send a new invitation.

Access is also removed automatically once a leaver's final working day has passed, and when an employee is deleted.

Limits at a glance

WHAT	LIMIT	NOTES
Password	At least 12 characters	Set when registering or resetting
Verification code	6 digits, lasts 10 minutes	5 wrong tries, then a new code is needed
PIN	4 to 6 digits	5 wrong tries locks the PIN for 5 minutes
Re-lock after switching away	60 seconds	The usual setting. Each ESS policy can change it; 0 locks every time
Booking leave ahead	365 days	The usual setting. Each ESS policy can change it
Fit note file	10 MB	A photo or a PDF
Shift swap notice	24 hours	The usual setting, before the first shift involved

Table 6 — Limits at a glance

How it connects to other features

- **Person records:** the invitation uses the work email, and the verification code can go to the work or personal email or mobile on the record. The username comes from the first name and surname.
- **Employment:** the ESS policy can be chosen on the employment. A leaver's app access ends after their final working day.
- **Leave Management:** requests from the app appear in the web version for the manager to approve, and balances come from the leave policy. See t2- 1055.

- **Timesheets and clocking points:** clockings from the app feed the timesheet. NFC and geo clocking points are set up as devices in the web version.
- **Conversation Hub:** conversations started in the app land with the manager or HR in the web version. See t2-1030.
- **Social Feed:** posts made in the web version appear on the Feed tab. See t2-1025.
- **Roll call:** during an evacuation, the fire alarm card appears on Home at the affected site. See t2-1070.

Things to be aware of

- **The Company Code box may say “demo”.** On the sign-in and registration screens it can already be filled in with **demo**. The employee must replace it with their own code, the **Tenant** from their email.
- **“Tenant” and “Company Code” are the same thing.** The email says one and the app says the other.
- **Invitations go to the work email only.** No work email, no invitation.
- **Policy changes need the app to restart.** After an ESS policy changes, the employee should close the app fully and reopen it. **[Check: how quickly a change to the ESS policy chosen on a person’s employment reaches the app.]**
- **One policy covers many people.** Changing an ESS policy changes the app for everyone on it. To change it for one person, choose a different policy on their employment.
- **Leave balances box.** With **Leave requests** ticked and **Leave balances** not ticked, the balance lines are hidden while requesting, but the allowance cards still show at the top of the Leave screen. **[Check: whether the allowance cards should also be hidden when Leave balances is off.]**
- **The clocking pill always says “Clocked in” for today.** The pill shows the time of today’s last clocking with **Clocked in**, even when that clocking was the end of the shift. The timesheet works out which clockings are in and out. **[Check: that the pill is meant to say Clocked in after a clock-out.]**
- **Offline.** With no signal, clocking still works if **Allow offline clocking** is ticked. Other tiles grey out and say **Available when you are back online**.
- **Leave from the app is always whole days** from the first day to the last day, and starts as **Waiting for review**.
- **Shift swaps history stays.** The Shift swaps and give-aways tile still shows for someone with past swaps, even if the policy no longer allows new ones.
- **Blocking is private.** A blocked colleague is not told, and blocking only hides their comments for the person who blocked them.

Common support questions

“I never got an invitation.”

Check the App access panel on their Insights page. If it says **Add a work email to invite this employee.**, add one first. If it says **Invited**, check the work email is right and click **Resend invitation**. Ask them to check junk mail.

“The app says No pending invitation found for this username.”

Check the Company Code isn't still **demo**, and the username matches the email exactly. If the status is **Active**, they have already registered: they should use **Sign In**, or **Forgot Password?**.

“My verification code didn't arrive.”

The code goes to the address or number they picked, as held on their record. Ask them to wait for **Didn't receive a code? Resend**, or go back and pick another method. A code lasts 10 minutes.

“I can't see Leave, Timesheet, my rota or another tile.”

Find their ESS policy and check the box in Table 3. Remember that Available shifts and Shift swaps also need **Schedule**. After any change, they close and reopen the app.

“I don't have the Feed tab.”

The **Social feed** box is not ticked on their ESS policy. Blocked colleagues in Settings disappears with it.

“There's no clocking card” or “I only have Offsite.”

No card means **Clocking** is off on their policy. **Tap a point** only appears when the company has NFC clocking points, and **On site** only when it has geo clocking points. **Offsite** needs **Allow offsite clocking**.

“The leave type I need isn't in the list.”

Only the types in **Allowed leave reasons** on their policy can be picked, and only reasons set to show in the app. If none are available, the app says **No leave types available - ask your administrator**.

“I don't get notifications.”

Ask them to check **Settings > Notifications** is on, run **Delivery check**, and check the phone allows notifications for the app. Social Feed posts don't send notifications.

“I've forgotten my PIN.”

After 5 wrong tries the PIN locks for 5 minutes. They can use Face ID or a fingerprint if it is set up, or tap **Use a different account** and sign in again with their password.

Try it yourself

Use a demo or training company, never a customer's, and a test employee with your own work email.

1 Invite yourself

Open the test employee's **Core > Insights** page and click **Invite to app**. Find the email and note the Tenant and Username.

2 Register

Install the app, tap **Register** and follow the steps. Set up a PIN on **Secure Your Account**.

3 Explore Home

Open each tile. Request a day of leave, then cancel the request.

4 Find the policy

In the web version, work out which ESS policy the test employee has, using the order in this guide.

5 Tidy up

Sign out of the app and click **Revoke access** on the test employee.

TIP

Check your understanding. A manager ticked **Shift marketplace** on the company's ESS policy an hour ago, and restarted his app, but his team still can't see Available shifts. The Insights page for one of them shows a different ESS policy. What has happened?

Answer: that employee has an ESS policy chosen on their employment, and it comes before the company policy. Tick **Shift marketplace** (and **Schedule**) on the policy they actually have, then ask them to close and reopen the app.