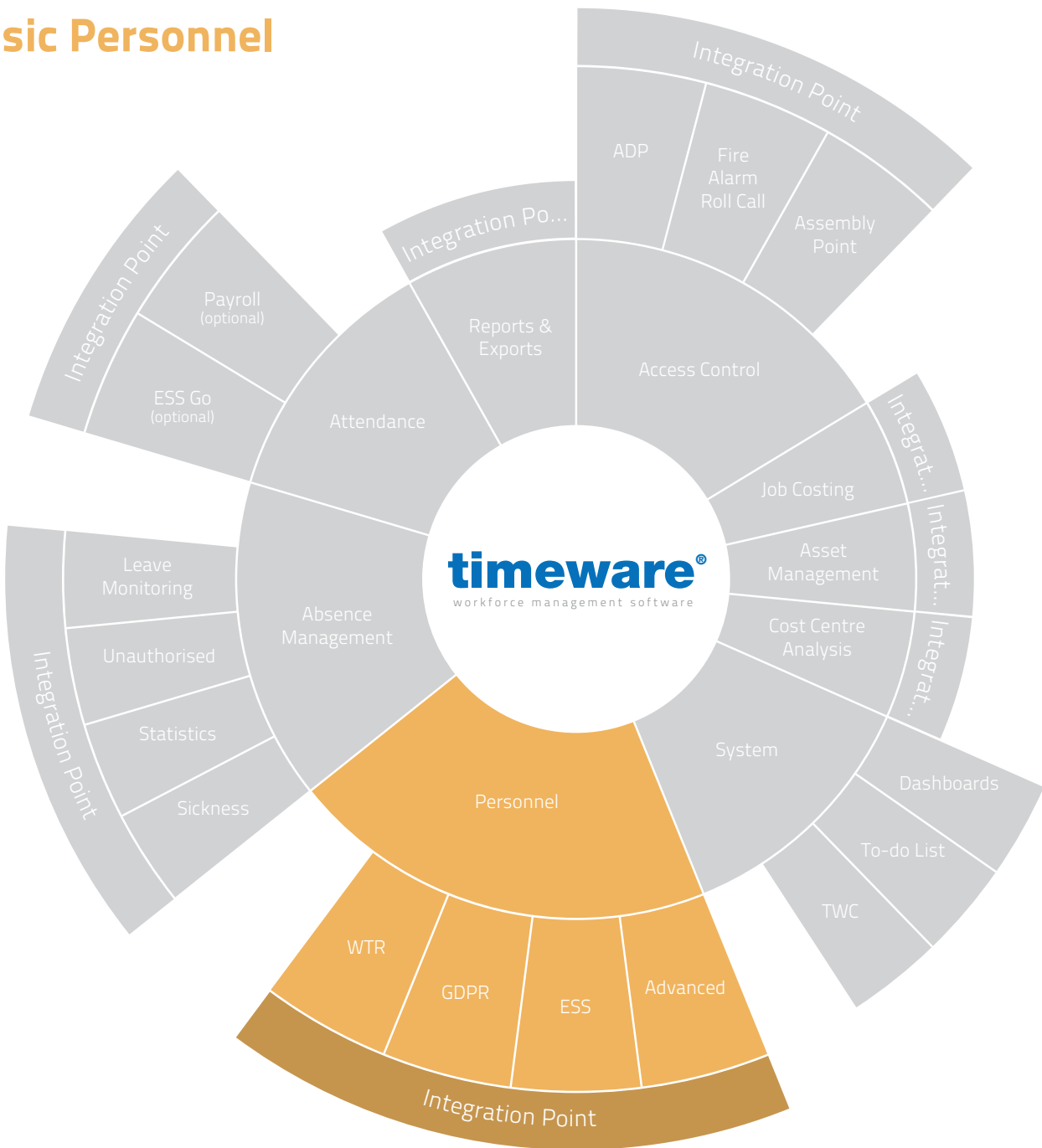


Training guide:  
**Basic Personnel**





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For more information about timeware® products, version updates, datasheets and reports, please refer to the timeware® community website:

[www.timeware.org](http://www.timeware.org)

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NMD<sup>3</sup> Ltd

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[www.timeware.org](http://www.timeware.org)  
+44 (0)1706 659368



# Contents

## Course

## Duration

**tw21/op/per001**

Approximately 30 minutes

### **An introduction to timeware<sup>®</sup> personnel**

Adding a personnel record, amending a personnel record and setting an employee as a leaver in timeware<sup>®</sup> personnel.

## Module

## Description

**m/02/101**

**understanding timeware<sup>®</sup> personnel**

**m/02/110**

**adding a new employee**

**m/02/120**

**making amendments to an existing employee**

**m/02/130**

**setting an employee to a leaver**

All information pertaining to any personnel record within this document is obtained from a demonstration database and are not details of any individual.



## Module:

m/02/101

## Understanding timeware® personnel

At the heart of the timeware® system is the personnel database. Before we can look at absence management, attendance, access control or job costing, we need to ensure that the details for each person are accurate.

Everyone on the timeware® system must have a personnel record, whether they are temporary workers or the Managing Director. Without this record the rest of the system cannot function.

The screenshot displays the 'Personnel' management interface for an employee named Dave Webb (Employee ID: 1). The interface is divided into several sections:

- Essential (General):** Contains fields for Badge format (26 bit - NMD3), Facility code (0), Badge (1), Payroll (1), Integration ID, GPS IMEI, Known as (Webb,Dave), Email address (dave.webb@timeware.co.uk), Security pin, and Biometric data (Finger (Suprema), Finger (SecuGen)).
- Essential (Groupings):** A table for grouping employees, with fields for Company (A & B Manufacturing), Department (Steel Prep), Section (Supervisor), Play Type (Hourly Paid), Line Manager, and Grouping 06-10.
- Essential (Employment):** A table showing employment records. The first record is:
 

| Reference  | Job Description | Date of Commencement | Date of Termination | Status |
|------------|-----------------|----------------------|---------------------|--------|
| Supervisor | Supervisor      | Sat 31 Oct 2009      |                     | Active |
- Left Navigation Panel:** Lists various categories such as Essential (General, Groupings, Employment, etc.), Miscellaneous (Personal, Contact Details, etc.), Employee Self Service, Mobile Worker, Vehicle, Health, Appraisal, and Working Time Regulations.
- Bottom Panel:** Shows 'Record 1 of 94' and standard database navigation buttons (Add, Edit, Delete, Find, Refresh, Preview, Copy, Close).

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## Module:

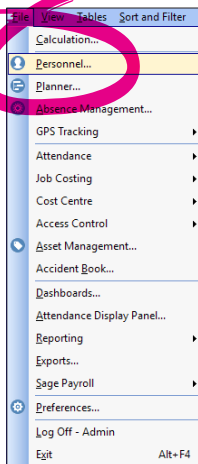
m/02/110

## Adding a new employee

1. To access the timeware<sup>®</sup> personnel, select the Personnel Quick Link,

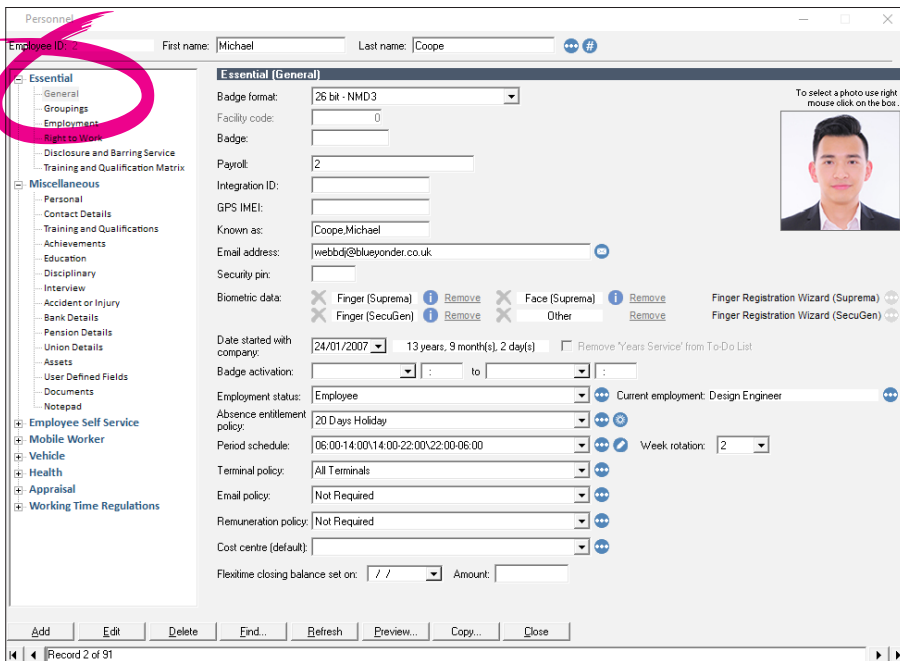
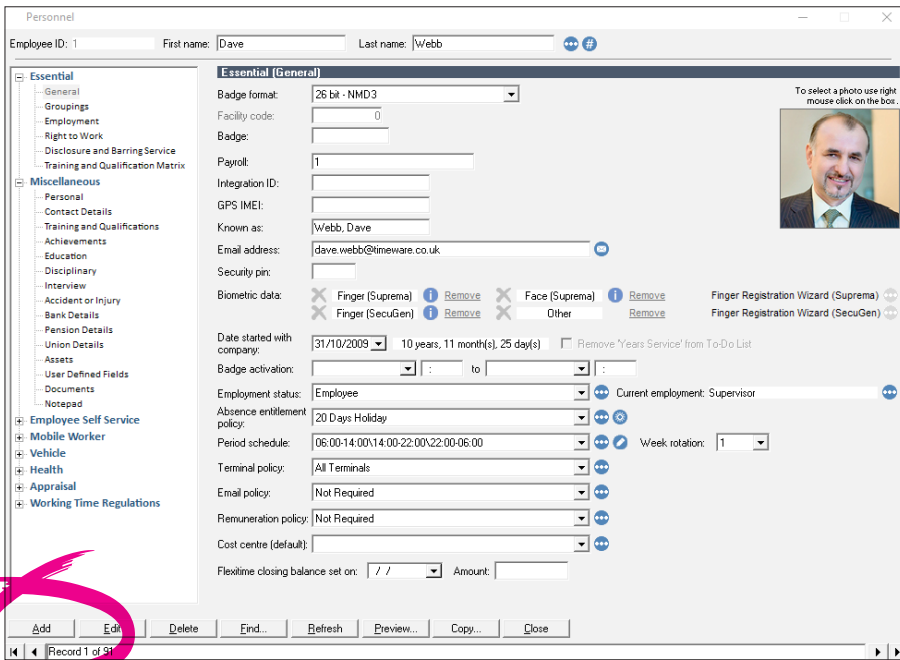


or, select <File>, then <Personnel>...



2. The personnel screen will appear at the record last viewed by the user.

Press <Add> to add a new personnel record. All the fields will then turn blue, ready for the new details.



Next, click on the General heading.

**3. Complete the following fields in the General screen:**

**a. First and last name**

**b. Badge number**

This is used for multiple purposes. It is the number on the back of your card/FOB, or it can be used as an identifier in use with some Suprema Biometrics

**c. Date started with company**

This can be assigned pro-actively and retro-actively i.e. set before or after the employee starts!

**d. Employment status**

This is to define a person's position in the company, whether they are Agency, Employee, Staff or a Leaver. The system can use these to filter if required i.e. in the reports module to filter out leavers etc.

**e. Absence Entitlement Policy**

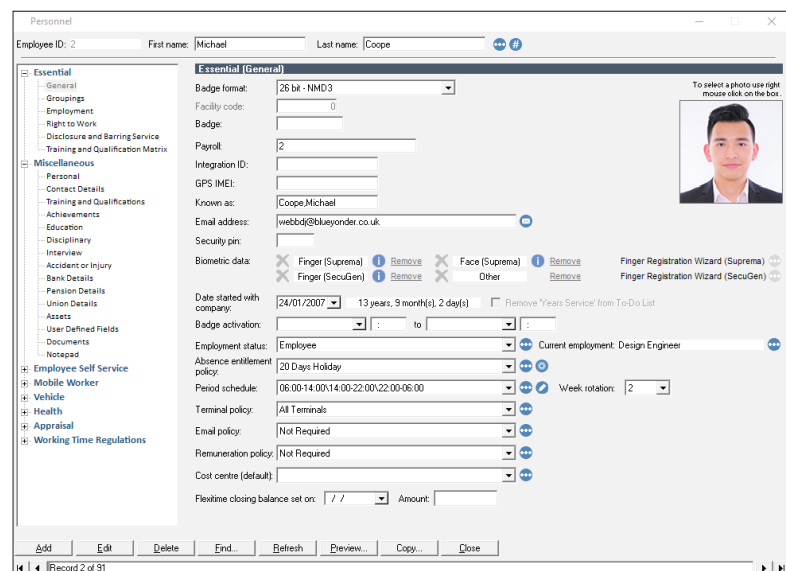
This defines the person's holiday allowance i.e. 28 days per year. The system gives a running total of absence entitlement based on absences (holidays) booked throughout the year. See Absence Management training guide for more info!

**f. Period Schedule**

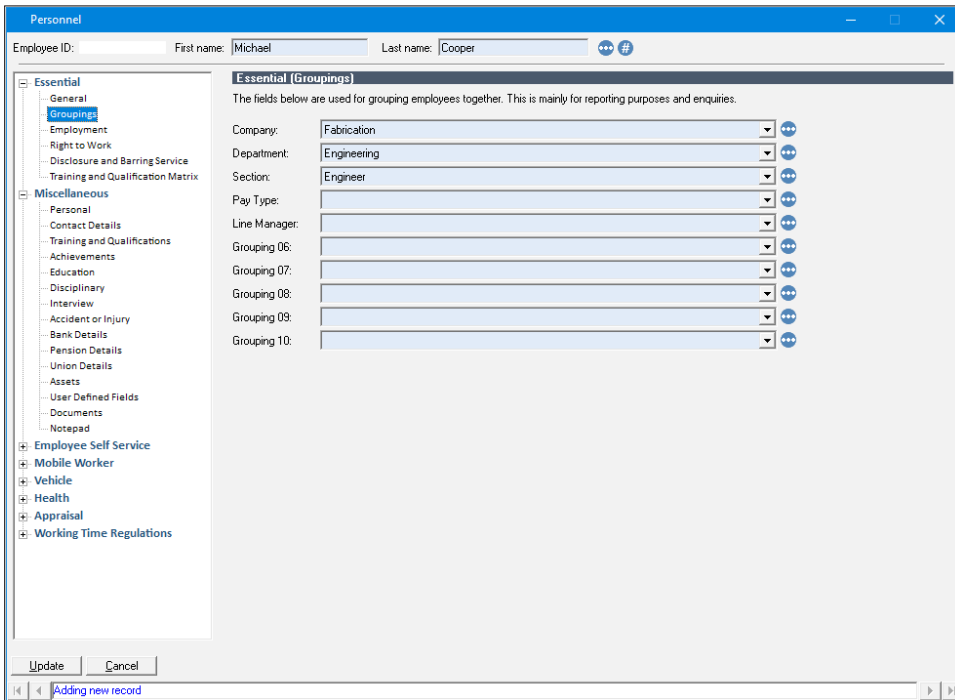
This is how a persons working pattern is defined whether they are rotational shift workers, night workers, flexitime workers etc. All of it is configured within the period schedule. For more information, please see the Advanced Attendance training guide!

**g. Terminal Policy**

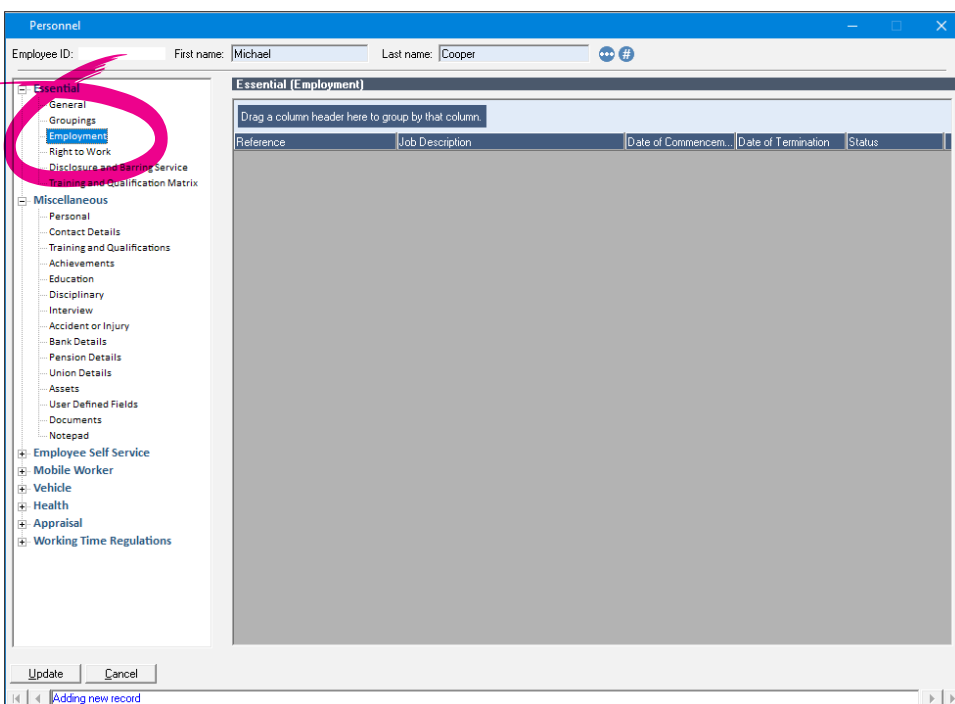
The Terminal Policy outlines which pieces of timeware hardware can be used (or not used!) e.g. You want employee A to access the Reception Door, but you don't want employee B to. They would both require separate policies to define the access permissions etc! For more information, please see the Advanced Personnel training guide!



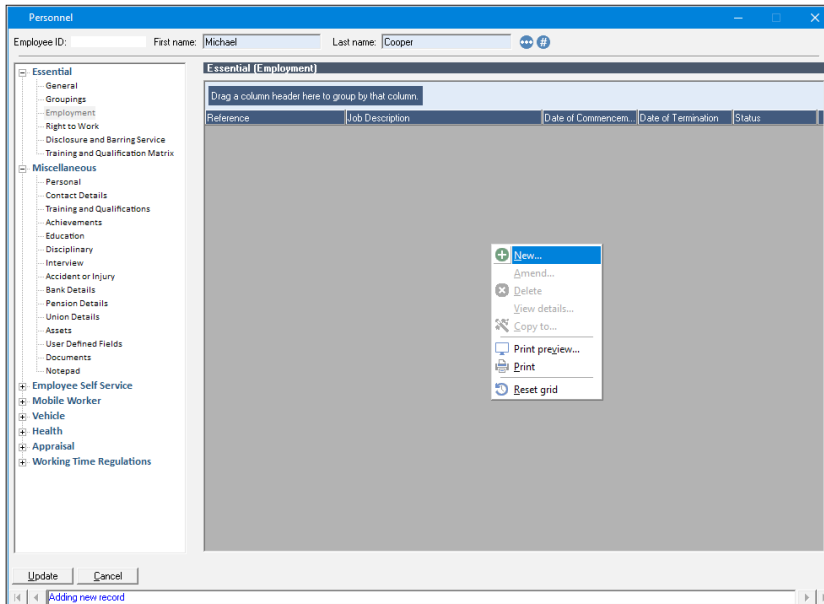
- Allocate the person to the correct, pre-defined, groupings in the Grouping screen. Remember, if you allocate the person to a group that you are not entitled to view, the person will disappear from your screen.



Next, click on the Employment heading in the Essentials section.



5. Right click and press <New>



Complete the following fields;

**Reference**

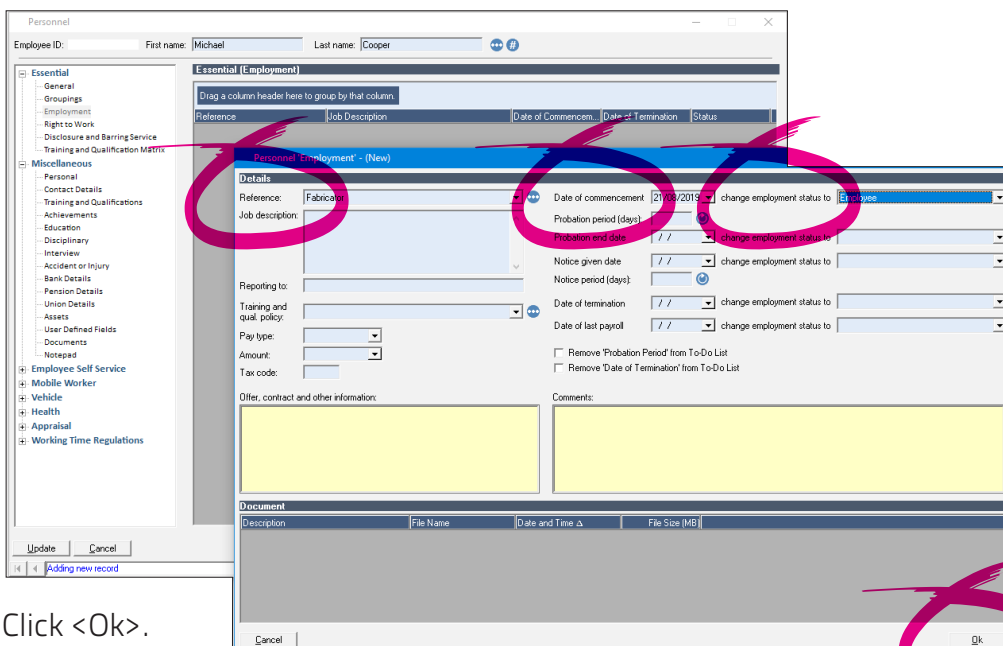
The person's job role i.e. Fabrication Manager or Accountant.

**Date of Commencement**

The date the person started in the selected job role.

**Employment status**

The person's status within the company i.e. Agency, Staff or Employee etc.



Click <Ok>.



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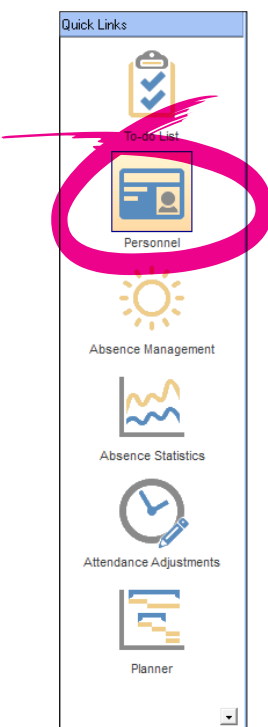
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## Module:

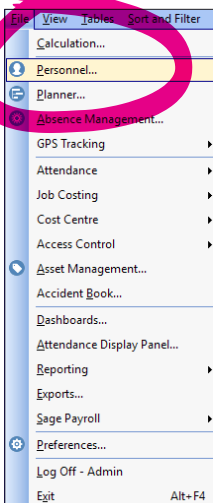
m/02/120

## Making amendments to an existing employee

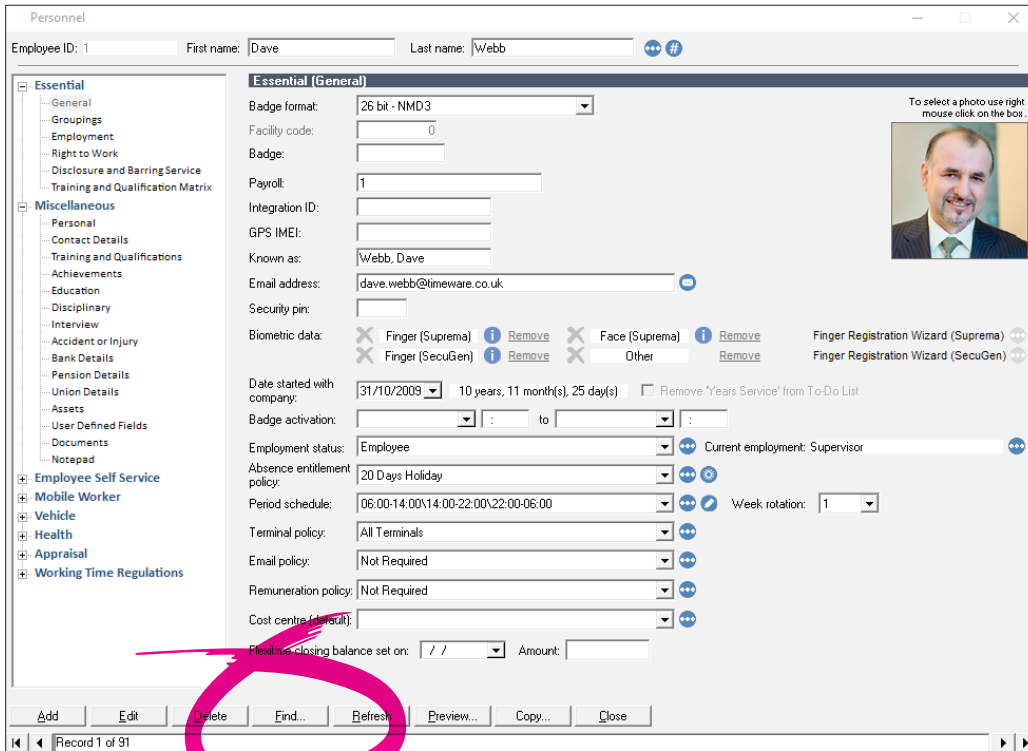
1. To access timeware<sup>®</sup> personnel, select the Personnel Quick Link,



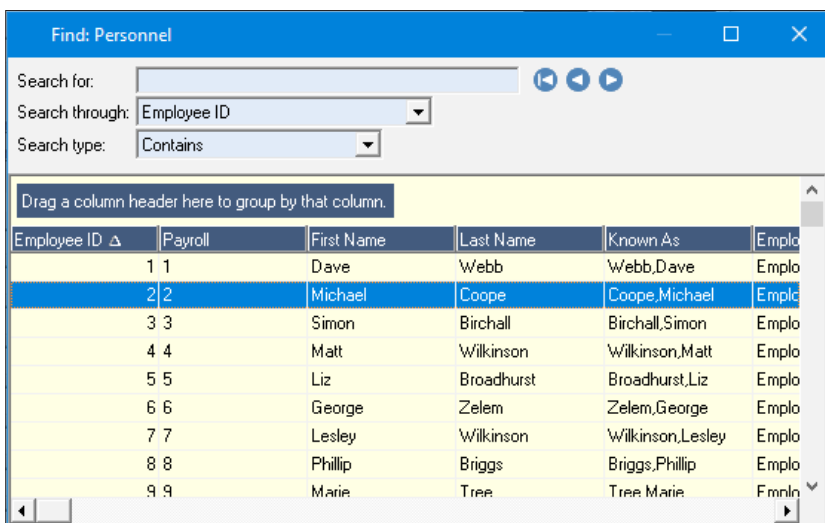
or, select <File>, then <Personnel>...



2. The personnel screen will appear at the record last viewed by the user.



Press <Find> to show list of all timeware® records.



Double click on the relevant employee record to open in personnel screen.



3. Click on <Edit> and begin modifying the required fields.

The screenshot shows the 'Personnel' window for employee Michael Coope. The 'Essential (General)' tab is active, displaying various fields for editing. A pink circle highlights the 'Edit' button at the bottom left of the window. The 'Add', 'Delete', 'Find...', 'Refresh', 'Preview...', 'Copy...', and 'Close' buttons are also visible.

**Personnel**  
Employee ID: 2    First name: Michael    Last name: Coope

**Essential (General)**

Badge format: 26 bit - NMD3  
Facility code: 0  
Badge: [ ]  
Payroll: 2  
Integration ID: [ ]  
GPS IMEI: [ ]  
Known as: Coope, Michael  
Email address: webbdj@blueyonder.co.uk  
Security pin: [ ]

Biometric data:  
 Finger (Suprema)  Face (Suprema)  
 Finger (SecuGen)  Other

Date started with company: 24/01/2007    13 years, 9 month(s), 2 day(s)     Remove 'Years Service' from To-Do List

Badge activation: [ ] : [ ] to [ ] : [ ]

Employment status: Employee    Current employment: Design Engineer

Absence entitlement policy: 20 Days Holiday

Period schedule: 06:00-14:00\14:00-22:00\22:00-06:00    Week rotation: 3

Terminal policy: Office Access Mon to Fri Only

Email policy: Not Required

Remuneration policy: Not Required

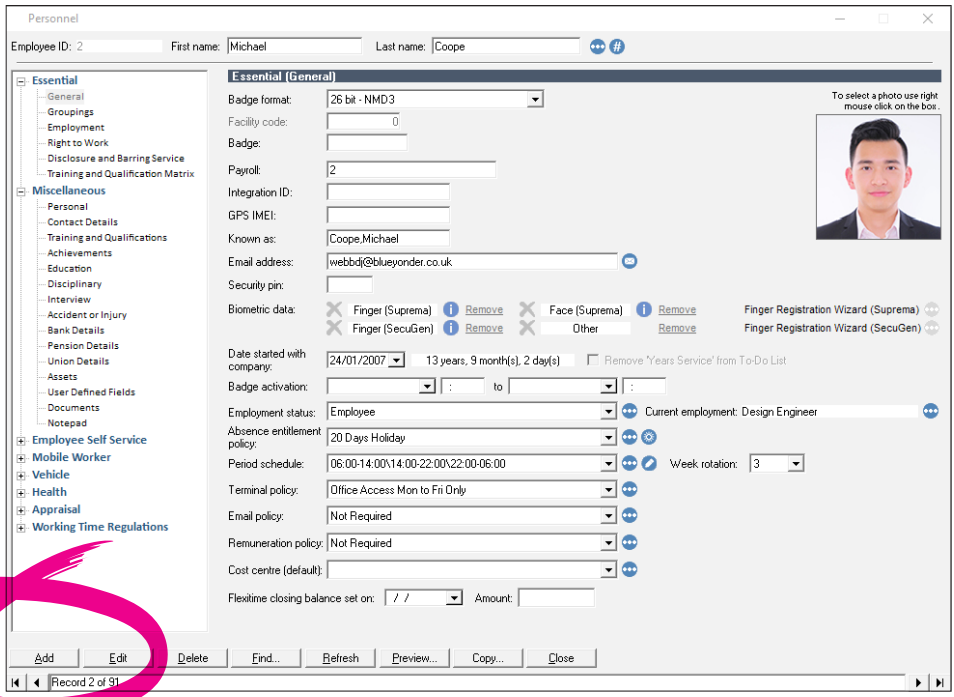
Cost centre (default): [ ]

Flexitime closing balance set on: / /    Amount: [ ]

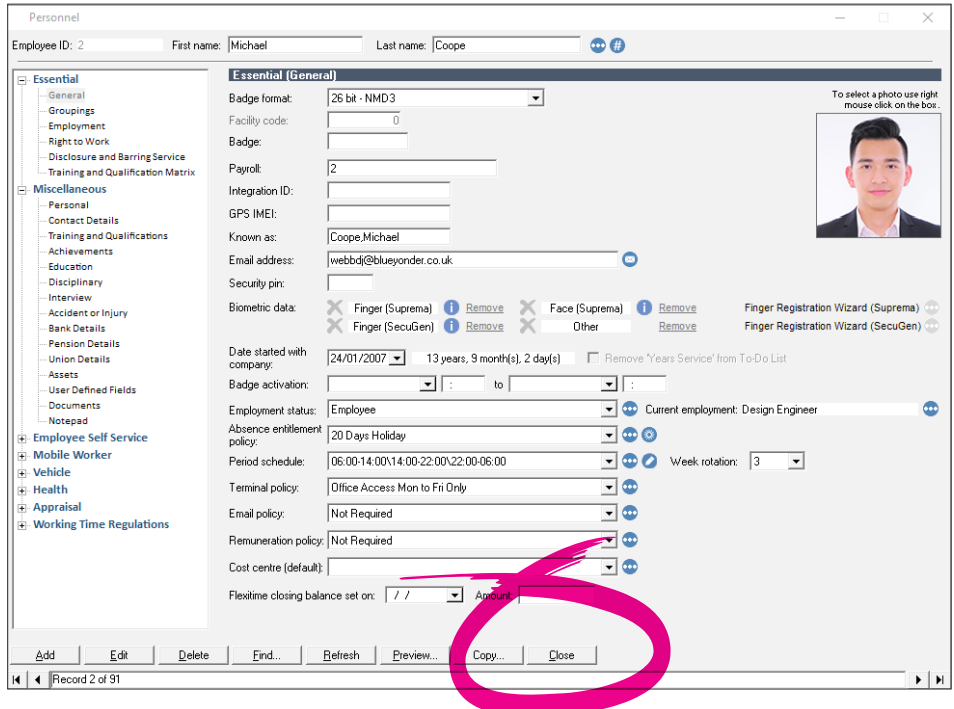
Buttons: Add, Edit, Delete, Find..., Refresh, Preview..., Copy..., Close

Record 2 of 91

- Next, click <Update> to save the personnel record. The person's details will be sent to the relevant timeware® terminals within thirty seconds.



Click <Close> to leave Personnel.



## Module:

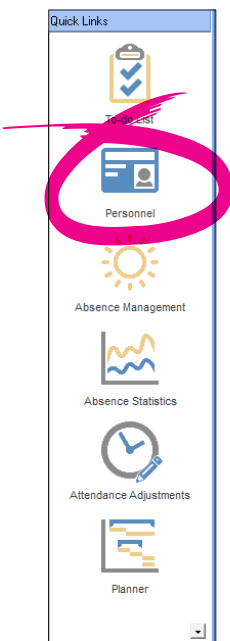
m/02/130

## Setting an employee to a leaver

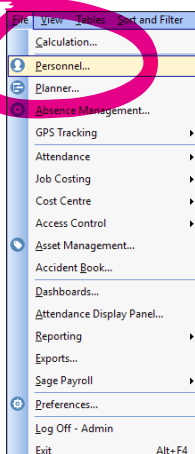


The act of deleting a personnel record removes all data for the person, including historic bookings and absences. Everything associated with that person gets removed! With this in mind, we strongly recommend against deleting personnel records – instead we recommend modifying the person's status to leaver. We will never delete an employee even if requested by you the customer to do so.

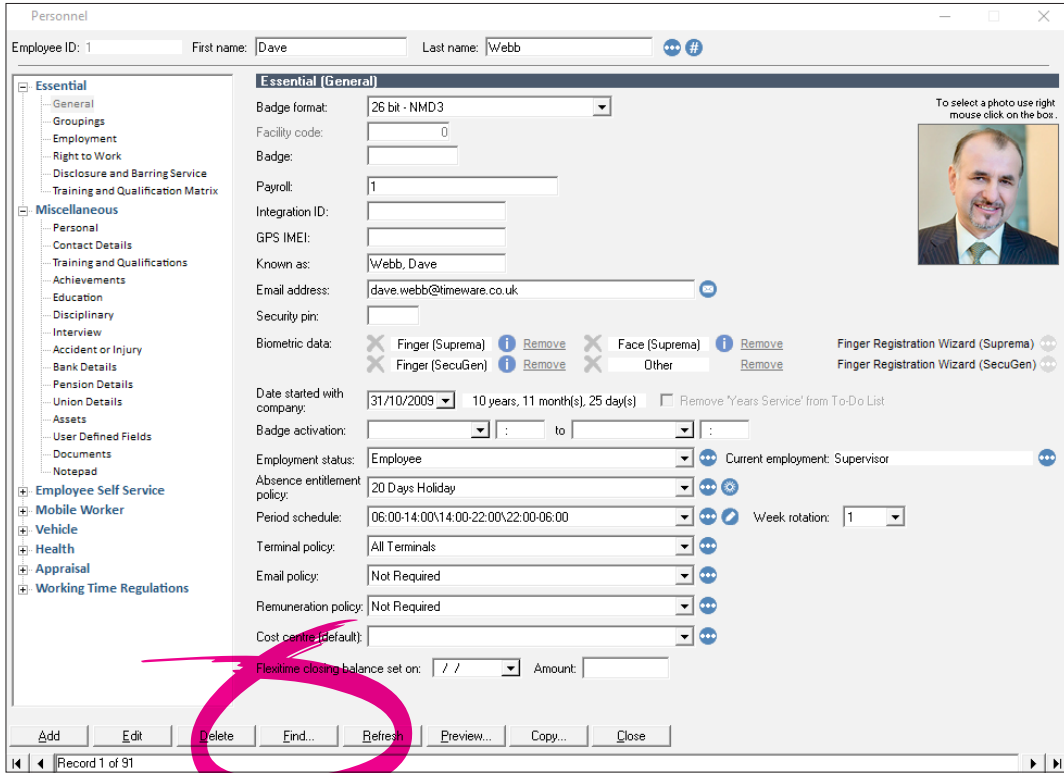
1. To access timeware<sup>®</sup> personnel, select the Personnel Quick link,



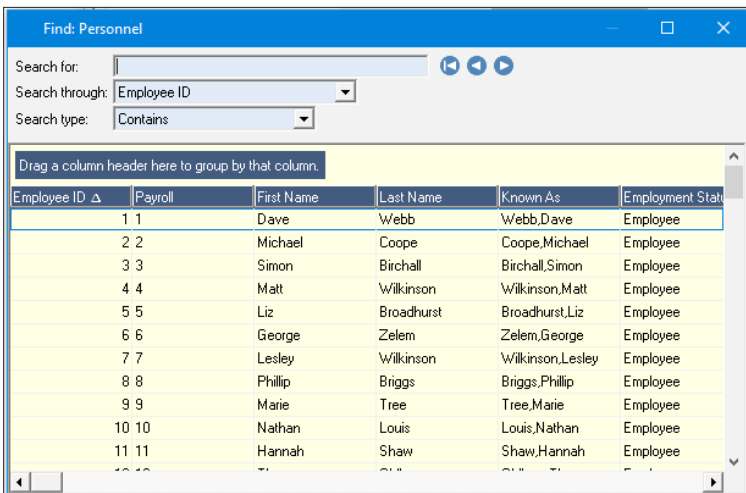
or, select <File>, then <Personnel>...



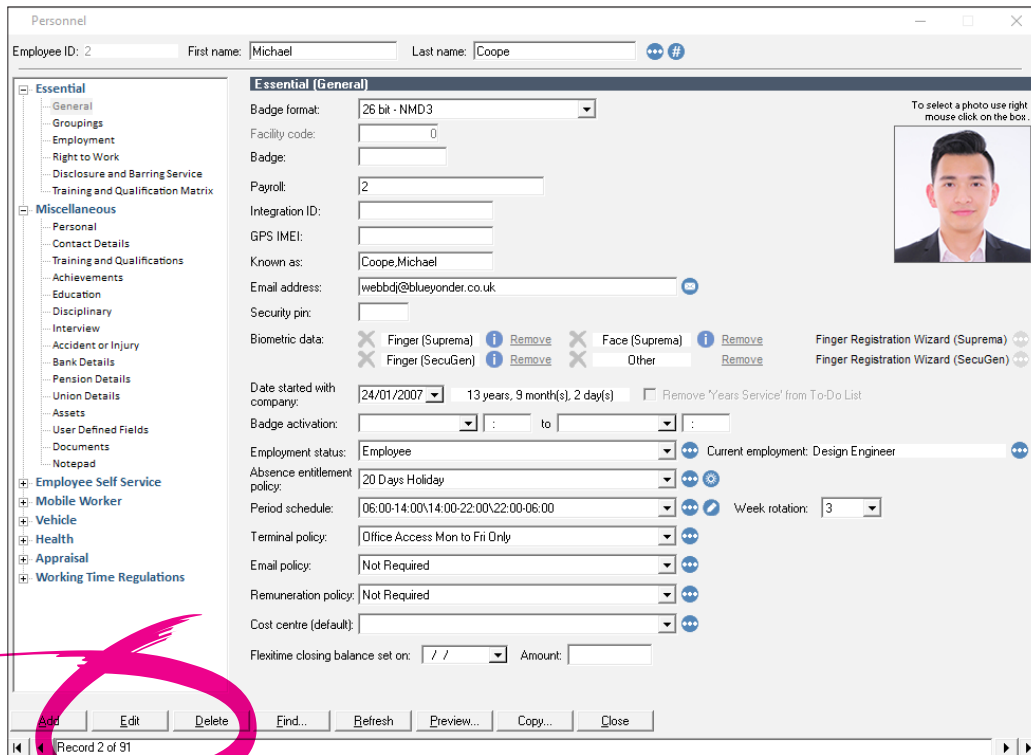
The personnel screen will appear at the record last viewed by the user.



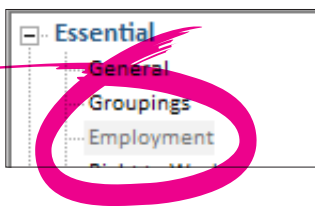
Press <Find> to show list of all timeware® records.



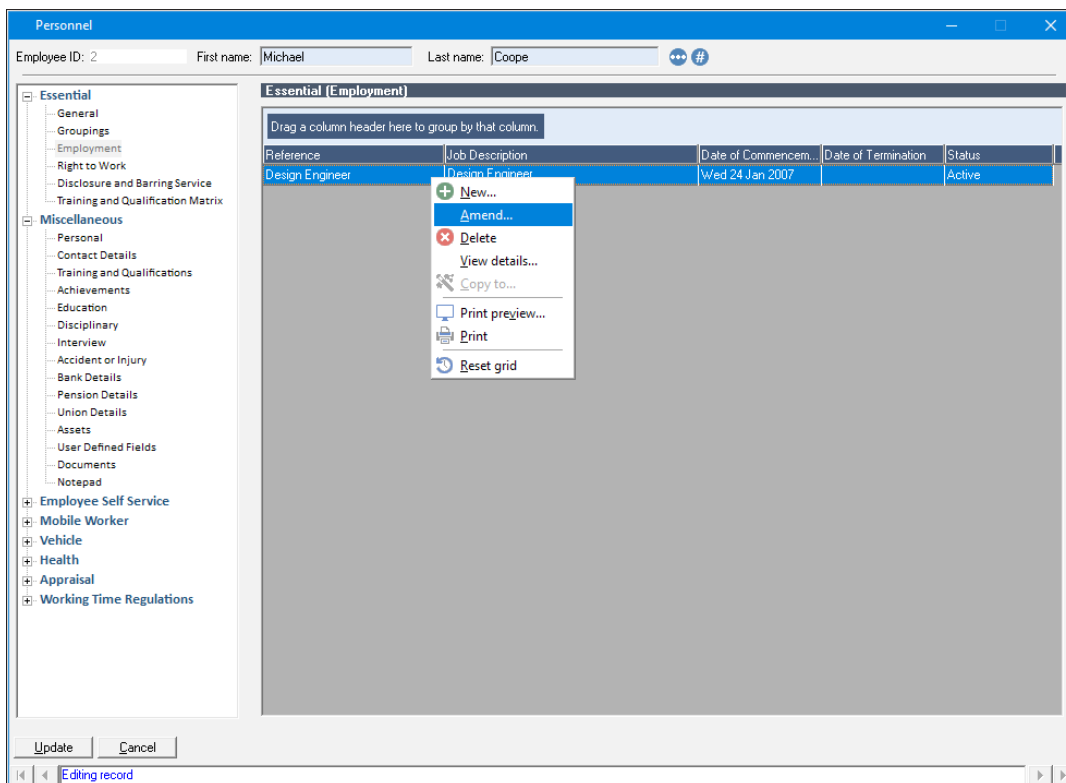
Double click on the relevant employee record to open in personnel screen.



3. Click on <Edit> and navigate to Employment in the Essential section



Right click on current employment record and then <amend>.



4. Add a date of termination and change employment status to leaver.

Personnel 'Employment' - (New)

**Details**

Reference: Design Engineer  
Job description: Design Engineer

Date of commencement: 24/01/2007  
Probation period (days):  
Probation end date: / /  
Notice given date: / /  
Notice period (days):  
Date of termination: 18/12/2020  
Date of last payroll: / /

change employment status to: Employee  
change employment status to:  
change employment status to:  
change employment status to:  
change employment status to: Leaver  
change employment status to: Leaver

Remove 'Probation Period' from To-Do List  
 Remove 'Date of Termination' from To-Do List

Offer, contract and other information:  
Comments:

**Document**

| Description | File Name | Date and Time | File Size (MB) |
|-------------|-----------|---------------|----------------|
|-------------|-----------|---------------|----------------|

Cancel OK

Click <Ok>.

Personnel

Employee ID: 2 First name: Michael Last name: Coope

**Essential (Employment)**

| Reference       | Job Description | Date of Commencem... | Date of Termination | Status |
|-----------------|-----------------|----------------------|---------------------|--------|
| Design Engineer | Design Engineer | Wed 24 Jan 2007      |                     | Active |

Update Cancel

Editing record

Then click <Update>.