

Module: m/02/110

'Adding a timeware® personnel record...'



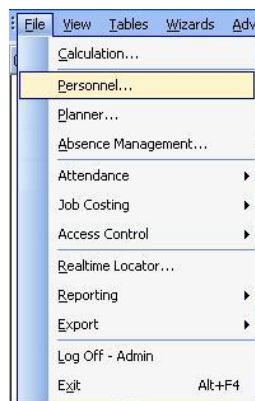
If recently added people are unable to make a booking at an attendance terminal or are unable to gain entry through an access terminal, please ensure that the above settings have been entered correctly. If the problem persists, please contact your timeware® administrator or ultimately, timeware® support on +44 (0)1706 658222



1. To access the timeware® 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 Essential heading.





3. Complete the following fields in the Essential screen:
 - a. First name & Last name
 - b. Badge number (if applicable)
 - c. Date started with the company
 - d. Status
 - e. Period schedule
 - f. Terminal policy
 - g. Email policy (if applicable)
 - h. Flexitime closing balance date & amount (if applicable)

The screenshot shows the 'Personnel' software window. At the top, it displays 'Employee ID: 305', 'First name: Nathan', and 'Last name: Price'. The left sidebar contains a tree view with categories like 'General', 'Personal Information Portal', 'Vehicle', 'Health', 'Appraisal', 'Working Time Regulations', 'Miscellaneous', and 'Secondary Employment'. The 'General' category is expanded, showing sub-items: 'Essential' (selected), 'Personal', 'Contact Details', 'Groupings', 'Remuneration', 'Job Specification', 'Bank Details', 'Pension Details', 'Union Details', 'User Defined Fields', 'Documents', and 'Notepad'. The main area is titled 'General (Essential)' and contains the following fields:

- Badge: 7934956
- Known as: Price, Nathan
- Biometric data: Finger (Remove), Hand (Remove)
- Date started with company: 01/01/2009 (2 years, 10 month(s), 23 day(s))
- Badge activation: [dropdown] to [dropdown]
- Current job: Office manager
- Person status: Employee
- Absence entitlement policy: Standard Holiday Entitlement
- Period schedule: Nathan Price (Week rotation: 1)
- Terminal policy: Standard Policy
- Email policy: [dropdown]
- Flexitime closing balance set on: / / Amount: [text box]

At the bottom, there are buttons: Add, Edit, Delete, Find..., Refresh, Preview..., Copy..., and Close. The status bar at the very bottom indicates 'Record 56 of 58'.

Next, click on the Personal heading.





4. Complete the following fields in the Personal screen:
 - a. Date of birth
 - b. Gender

Next, click on the Contact Details heading.

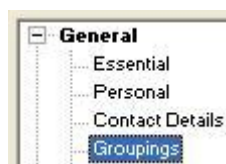




5. Complete just one field in the Contact Details screen:
 - a. Email address (if applicable)

A screenshot of the "Personnel" software window. The title bar says "Personnel". Below it, there are fields for "Employee ID: 305", "First name: Nathan", and "Last name: Price". The left sidebar has a tree view with categories: "General" (containing Essential, Personal, Contact Details, Groupings, Remuneration, Job Specification, Bank Details, Pension Details, Union Details, User Defined Fields, Documents, and Notepad), "Personal Information Portal", "Vehicle", "Health", "Appraisal", "Working Time Regulations", "Miscellaneous", and "Secondary Employment". The "Contact Details" item is selected. The main area shows the "General (Contact Details)" tab with fields for "Address" (1 Fieldhouse Road, Rochdale, Lancashire), "Postcode" (OL12 0AD), "Home and pager number", "SMS number" (447595218855), "E-mail address" (nathan.price@timeware.co.uk), and "Next of kin contact name, telephone no. and relationship". At the bottom, there are buttons: "Add", "Edit", "Delete", "Find...", "Refresh", "Preview...", "Copy...", and "Close". A status bar at the very bottom says "Record 56 of 58".

Next, click on the Groupings heading.





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

A screenshot of the "Personnel" application window. The window has a blue title bar and a menu bar. Below the menu bar, there are input fields for "Employee ID: 305", "First name: Nathan", and "Last name: Price". On the left side, there is a tree view with categories: "General" (containing Essential, Personal, Contact Details, Remuneration, Job Specification, Bank Details, Pension Details, Union Details, User Defined Fields, Documents, and Notepad), "Personal Information Portal" (containing Account), "Vehicle", "Health", "Appraisal", "Working Time Regulations", "Miscellaneous", and "Secondary Employment". The "General" category is selected, and the "Groups" sub-category is highlighted. The main area of the window is titled "General (Groupings)" and contains a text box stating: "The fields below are used for grouping employees together. This is mainly for reporting purposes and enquiries." Below this text box are several dropdown menus: "Directorate:" (set to "Administration & Community Services"), "Department:" (set to "Building Regulations"), "Sub Dept:", "Location:", "Category:", "Grouping 06:", "Grouping 07:", "Grouping 08:", "Grouping 09:", and "Grouping 10:". At the bottom of the window, there is a toolbar with buttons: "Add", "Edit", "Delete", "Find...", "Refresh", "Preview...", "Copy...", and "Close". The status bar at the very bottom shows "Record 56 of 58".

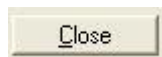


7. Complete the following fields in the PIP account screen:
 - a. User name
 - b. Password
 - c. PIP profile

A screenshot of a software window titled "Personnel". At the top, there are input fields for "Employee ID: [Auto]", "First name:", and "Last name:". Below these is a tree view on the left with categories: "General" (containing Essential, Personal, Contact Details, Groupings, Holiday and Absence Entitlement, Attendance Terminals, Remuneration, Job Specification, Bank Details, Pension Details, Union Details, User Defined Fields, Documents, Notepad), "Personal Information Portal" (containing Account, Vehicle, Health, Appraisal, Working Time Regulations, Miscellaneous, Secondary Employment), and "Vehicle". The "Personal Information Portal (Account)" section is selected and expanded on the right. It contains three input fields: "User name:", "Password:", and "PIP profile:". A "Note:" states "Password must be entered to make this a valid account." At the bottom of the window are "Update" and "Cancel" buttons, and a status bar at the very bottom says "Adding new record".

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

Click <Close> to leave Personnel.





Notes