

Module: m/02/501

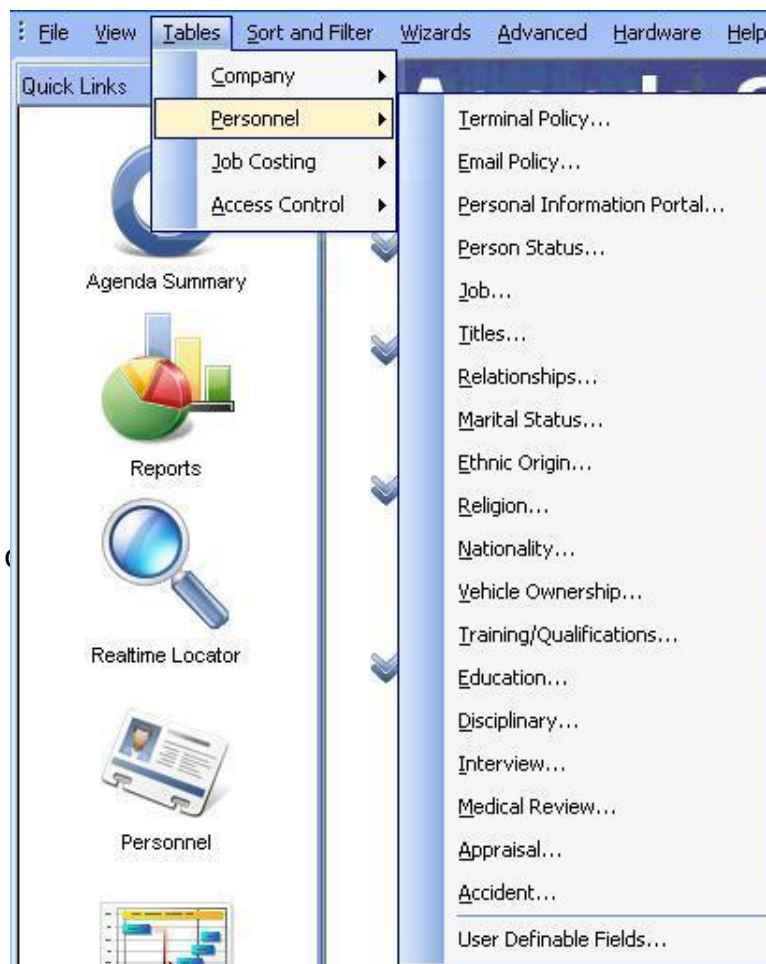
'Preparing your timeware[®] system: personnel...'



The following module should be completed for every timeware[®] installation.



1. To prepare timeware[®] personnel, select the Tables menu then Personnel.

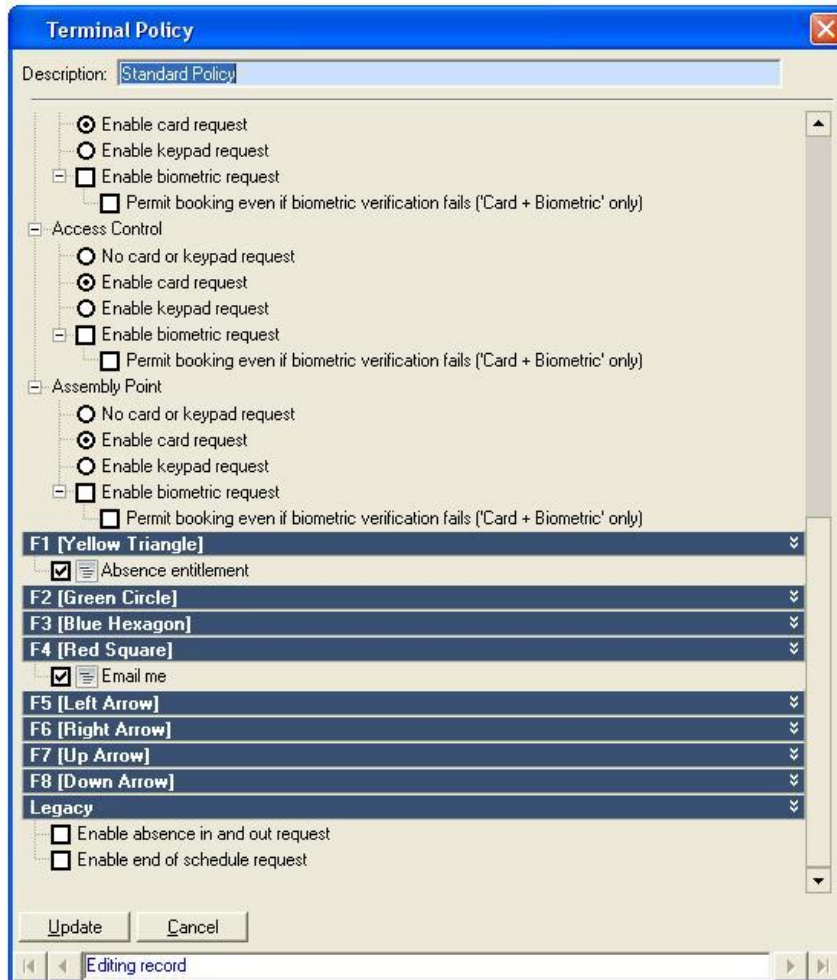




2. The Terminal Policy determines the features that are available to a person at the terminal. For example, on an attendance terminal, should a person type their badge number into the terminal or should they use their fingerprint or card?

A screenshot of the "Terminal Policy" configuration window. The window has a blue title bar with the text "Terminal Policy" and a red close button. Below the title bar is a "Description:" field containing the text "Standard Policy". The main content area is divided into two sections: "Terminal Assignment" and "Verification". The "Terminal Assignment" section has a tree view with four categories: "Attendance", "Job Costing", "Access Control", and "Assembly Point". Each category has a "Include all terminals?" radio button (selected) and a "Select specific terminals?" radio button. Under "Attendance", "Select specific terminals?" is selected, and three terminals are listed: "Enfield terminal", "gprs test", and "Rochdale terminal", each with a checked checkbox. Under "Job Costing", "Select specific terminals?" is selected, and two terminals are listed: "Enfield job costing terminal 1" and "Enfield job costing terminal 2", each with a checked checkbox. Under "Access Control", "Include all terminals?" is selected. Under "Assembly Point", "Include all terminals?" is selected. The "Verification" section has a tree view with one category: "Attendance". It has five options: "Administrator?" (unchecked checkbox), "No card or keypad request" (radio button), "Enable card request" (radio button), "Enable keypad request" (radio button), and "Enable biometric request" (unchecked checkbox). At the bottom of the window are "Update" and "Cancel" buttons. The status bar at the very bottom says "Editing record".

The terminals covered are Attendance, Job Costing, Access Control and Assembly Points.



There are four pre-defined terminal policies:

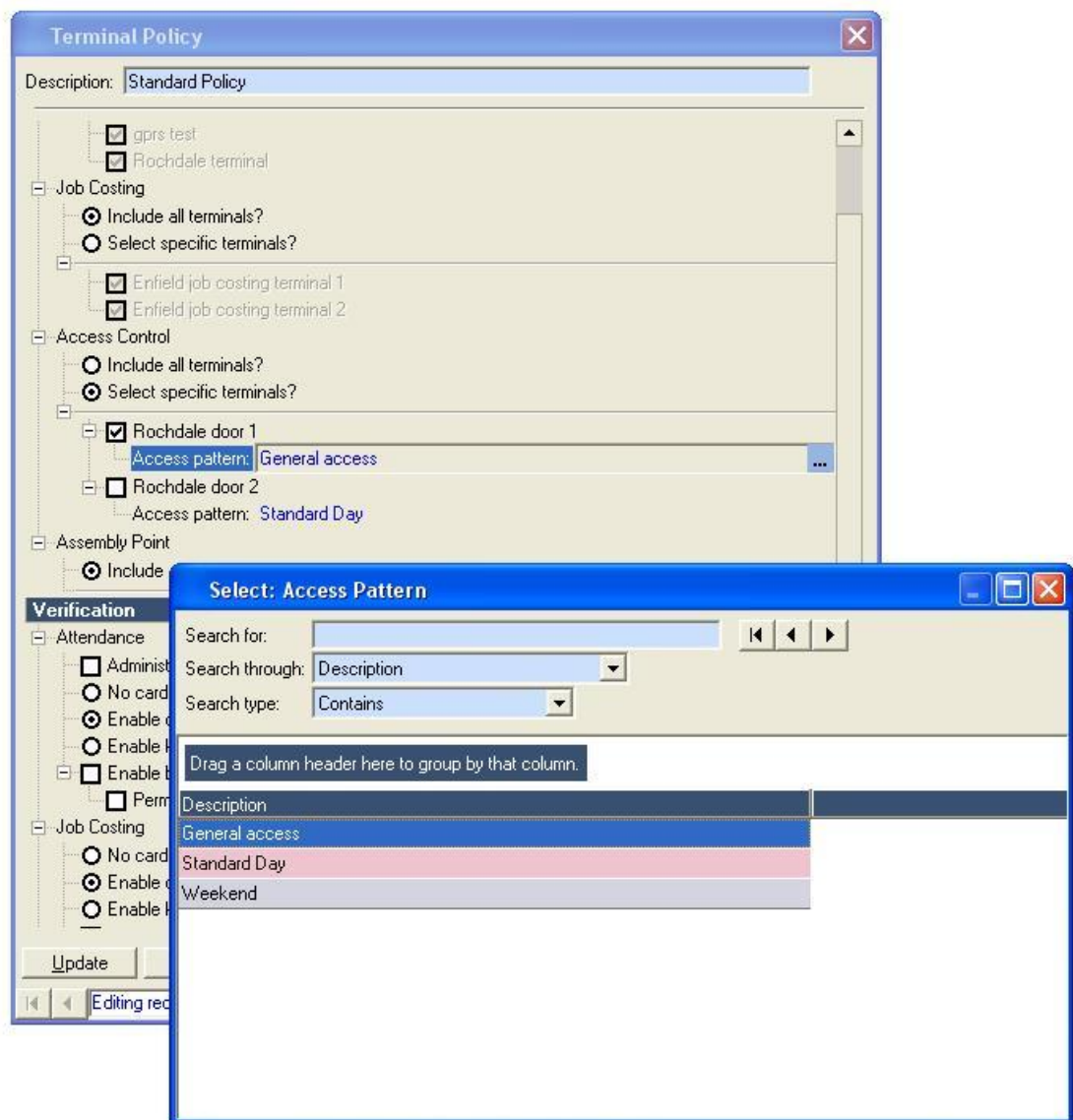
- Biometric (disallow failures)
- Biometric (allow failures)
- Card/fob
- Keypad

Additional policies may be added by the user.

Special notes for access terminals

When configuring each of the access terminal, the user can determine which of the pre-defined access pattern may be used.

It is recommended that the access patterns are created *before* completing the terminal policies.





3. The Email Policy determines whether an email should be sent to the person when:
 - a. An absence request is finalised by a Manager
 - b. A manually entered booking (through the PIP) is finalised by a Manager.

A screenshot of the "Email Policy" configuration window in a software application. The window has a blue title bar with the text "Email Policy" and a close button (X) on the right. Below the title bar is a "Description:" label followed by a text input field. There are three expandable sections: "Absence and Holidays", "Attendance Bookings", and "System". Each section has a dropdown arrow on the right. Under "Absence and Holidays" and "Attendance Bookings", there is a checkbox labeled "Send email when finalisation is changed?". The "System" section is currently expanded, showing a large empty area. At the bottom of the window, there are "Update" and "Cancel" buttons. Below these buttons is a status bar with a left arrow, a right arrow, and the text "Adding new record".

There are two pre-defined Email policies:

- a. Receive finalisation Email
- b. Do not receive finalisation Email

Additional policies may be added by the user.



Remember for the Email features to work, the timeware administrator must have configured the Email setup in Advanced Options, (module m-01-035).



4. The Personal Information Panel (PIP) profile determines what features a person can access when using the PIP.


A screenshot of a software window titled "Personal Information Portal". The window has a blue title bar with a close button (X) in the top right corner. Below the title bar, there is a text field labeled "Description:" containing the text "Real Time Booking Allowed". Below this, there are two radio buttons: "No restrictions" and "Restrict access to 'Personal Information Portal' (PIP)". The "Restrict access to 'Personal Information Portal' (PIP)" option is selected. Below the radio buttons, there are two expandable sections. The first section is titled "Attendance Bookings" and is expanded, showing a list of checkboxes: "Attendance bookings..." (checked), "Allow real time booking?" (checked), "Allow missed booking?" (checked), "Allow pair of missed bookings?" (checked), "Allow lunch bookings?" (checked), and "Display rates" (unchecked). The second section is titled "Absence and Holidays" and is also expanded, showing a list of checkboxes: "Absence and Holidays..." (checked), "Submit absence?" (checked), and "Current absence year (report)" (checked). At the bottom of the window, there are two buttons: "Update" and "Cancel". Below the buttons, there is a status bar that says "Editing record".

There are three pre-defined PIP profiles:

- a. Attendance only
- b. Absence only
- c. Attendance & Absence

Additional profiles may be added by the user.

5. The Person Status may be used to categorise employees. It is mainly used to highlight leavers, to exclude people from the agenda, to exclude people from the terminal and calculation.



The dialog box is titled "Person Status" and has a blue header bar with a close button (X) in the top right corner. Below the header, there is a text field labeled "Description:" containing the word "Employee". Below this, a note states: "A back colour can be assigned to a status, which is used to highlight an employee when using the find feature." To the right of this note is a dropdown menu currently showing "(Default)". Underneath, the section "Status Options" contains four checkboxes, all of which are unchecked: "Working notice", "Exclude from working time regulations, payroll export, realtime locator and planner", "Exclude from agenda", and "Exclude from terminal(s) and calculation". At the bottom left are two buttons: "Update" and "Cancel". At the bottom right, there is a status bar with the text "Editing record" and navigation arrows.

There are six pre-defined Employee Status:

- a. Full-time employee
- b. Part-time employee
- c. Working notice
- d. Exclude from reports, payroll export, realtime locator and planner
- e. Exclude from agenda
- f. Exclude from terminal and calculation

Additional profiles may be added by the user.



6. The Job Code & Description are used in the Personnel, Job Specification screen.

A screenshot of a web-based application window titled "Job". The window has a blue header bar with a close button (X) in the top right corner. Below the header, there are two input fields: "Code:" with the value "MANAGER" and "Description:" with the value "Office manager". Below these fields is a row of seven buttons: "Add", "Edit", "Delete", "Find...", "Refresh", "Preview...", and "Close". At the bottom of the window, there is a status bar showing "Record 1 of 2" with navigation arrows on either side.

There are two pre-defined job descriptions:

- a. Manager
- b. Administrator

Additional job descriptions may be added by the user.



7. Titles are used in the Personnel, personal screen

A screenshot of a software dialog box titled "Titles". The dialog box has a blue header bar with the title "Titles" and a red close button (X) in the top right corner. Below the header, there is a text input field labeled "Description:" containing the text "Dr.". Below the input field are two buttons: "Update" and "Cancel". At the bottom of the dialog box, there is a status bar with the text "Editing record" and navigation arrows on either side.

There are seven pre-defined titles:

- a. Mr.
- b. Mrs.
- c. Ms.
- d. Master.
- e. Dr.
- f. Sir
- g. Prof.

Additional titles may be added by the user.



8. Relationships are used in the Personnel, Contact Details screen.

A screenshot of a software dialog box titled "Relationships". It has a blue title bar with a close button (X) in the top right corner. The main area is light beige. At the top, there is a label "Description:" followed by a text input field containing the word "Aunt". Below the input field are two buttons: "Update" and "Cancel". At the bottom of the dialog, there is a status bar with the text "Editing record" and navigation arrows on either side.

There are six pre-defined relationships:

- a. Husband
- b. Wife
- c. Son
- d. Daughter
- e. Aunt
- f. Uncle

Additional relationships may be added by the user.



9. Marital Status is used in the Personnel, Personal screen.

A screenshot of a software dialog box titled "Marital Status". The dialog box has a blue title bar with a close button (X) in the top right corner. Inside the dialog, there is a text field labeled "Description:" containing the word "Married". Below the text field are two buttons: "Update" and "Cancel". At the bottom of the dialog, there is a status bar with the text "Editing record" and navigation arrows on either side.

There are four pre-defined Marital Status:

- a. Married
- b. Single
- c. Divorced
- d. Separated

Additional marital status may be added by the user.



10. Ethnic Origin is used in the Personnel, Personal screen.

A screenshot of a software dialog box titled "Ethnic Origin". The dialog box has a blue title bar with a close button (X) in the top right corner. Inside the dialog, there is a text field labeled "Description:" containing the text "White-British". Below the text field are two buttons: "Update" and "Cancel". At the bottom of the dialog, there is a status bar with the text "Editing record" and navigation arrows on either side.

There are a number of pre-defined ethnic origins:

Additional ethnic origins may be added by the user.



11. Religion is used in the Personnel, Personal screen.

A screenshot of a software dialog box titled "Religion". The dialog box has a blue title bar with a red "X" button in the top right corner. Inside the dialog, there is a label "Description:" followed by a text input field containing the word "Christian". Below the input field are two buttons: "Update" and "Cancel". At the bottom of the dialog, there is a status bar with the text "Editing record" and navigation arrows on either side.

There are a number of pre-defined religions:

Additional religions may be added by the user.



12. Nationality is used in the Personnel, Personal screen.

A screenshot of a software dialog box titled "Nationality". The dialog box has a blue header bar with the title and a red close button (X) in the top right corner. The main area is light beige. It contains a label "Description:" followed by a text input field containing the word "British". Below the input field are two buttons: "Update" and "Cancel". At the bottom of the dialog box, there is a status bar with a label "Editing record" and navigation arrows on either side.

There are a number of pre-defined nationalities.

Additional nationalities may be added by the user.



13. Vehicle Ownership is used in Personnel, vehicle, general.

A screenshot of a software dialog box titled "Vehicle Ownership". The dialog has a blue title bar with a close button (X) in the top right corner. Inside the dialog, there is a text field labeled "Description:" containing the text "Contract hire". Below the text field are two buttons: "Update" and "Cancel". At the bottom of the dialog, there is a status bar with the text "Editing record" and navigation arrows on either side.

There are three pre-defined vehicle ownerships:

- a. Contract hire
- b. Leased
- c. Purchased

Additional vehicle ownerships may be added by the user.



14. Training/Qualifications are used in the Personnel, Miscellaneous, Training/Qualifications screen.

A screenshot of a software dialog box titled "Training/Qualifications". The dialog has a blue title bar with a close button (X) in the top right corner. Inside, there are two text input fields: "Code:" with the value "FIRSTAID" and "Description:" with the value "First Aid". Below these fields are two buttons: "Update" and "Cancel". At the bottom of the dialog, there is a status bar with navigation arrows and the text "Editing record".

There are a number of pre-defined training/qualifications.

Additional training/qualifications may be added by the user.



15. Education codes are used in the Personnel, Miscellaneous, Education screen.

A screenshot of a software dialog box titled "Education". It has a blue header bar with a red "X" button in the top right corner. The main area is light beige. It contains two input fields: "Code:" with the text "UNI" and "Description:" with the text "University". Below these fields are two buttons: "Update" and "Cancel". At the bottom, there is a status bar with a double arrow icon on the left, the text "Editing record", and a double arrow icon on the right.

There are a number of pre-defined education codes.

Additional education codes may be added by the user.



16. Disciplinary codes are used in the Personnel, Miscellaneous, Disciplinary screen.

A screenshot of a web-based form titled "Disciplinary". The form has a blue header bar with the title and a close button (X). Below the header, there are two input fields: "Code:" with the value "EXLATE" and "Description:" with the value "Excessive lateness". Below these fields are two buttons: "Update" and "Cancel". At the bottom of the form, there is a status bar with the text "Editing record" and navigation arrows.

There are a number of pre-defined disciplinary codes.

Additional disciplinary codes may be added by the user.



17. Interview codes are used in the Personnel, Miscellaneous, Interview screen.

A screenshot of a software dialog box titled "Interview". The dialog box has a blue title bar with a close button (X) in the top right corner. Inside the dialog, there are two text input fields. The first field is labeled "Code:" and contains the text "INT1". The second field is labeled "Description:" and contains the text "First Interview". Below these fields are two buttons: "Update" and "Cancel". At the bottom of the dialog, there is a status bar with the text "Editing record" and navigation arrows on either side.

There are a number of pre-defined interview codes.

Additional interview codes may be added by the user.



18. Medical Review codes are used in the Personnel, Miscellaneous, Medical Review screen.

A screenshot of a software dialog box titled "Medical Review". The dialog box has a blue title bar with a close button (X) in the top right corner. Inside the dialog, there are two text input fields. The first is labeled "Code:" and contains the text "MEDGEN". The second is labeled "Description:" and contains the text "General medical review". Below these fields are two buttons: "Update" and "Cancel". At the bottom of the dialog, there is a status bar with the text "Editing record" and navigation arrows on either side.

There are a number of pre-defined medical review codes.

Additional medical review codes may be added by the user.



19. Appraisal codes are used in the Personnel, Miscellaneous, Appraisal screen.

A screenshot of a software dialog box titled "Appraisal". The dialog box has a blue header bar with the title and a red close button. The main area is light beige. It contains two text input fields: "Code:" with the value "JUL2011" and "Description:" with the value "July 2011 appraisal meeting". Below these fields are two buttons: "Update" and "Cancel". At the bottom of the dialog box, there is a status bar with the text "Editing record" and navigation arrows on either side.

There are a number of pre-defined appraisal codes.

Additional appraisal codes may be added by the user.



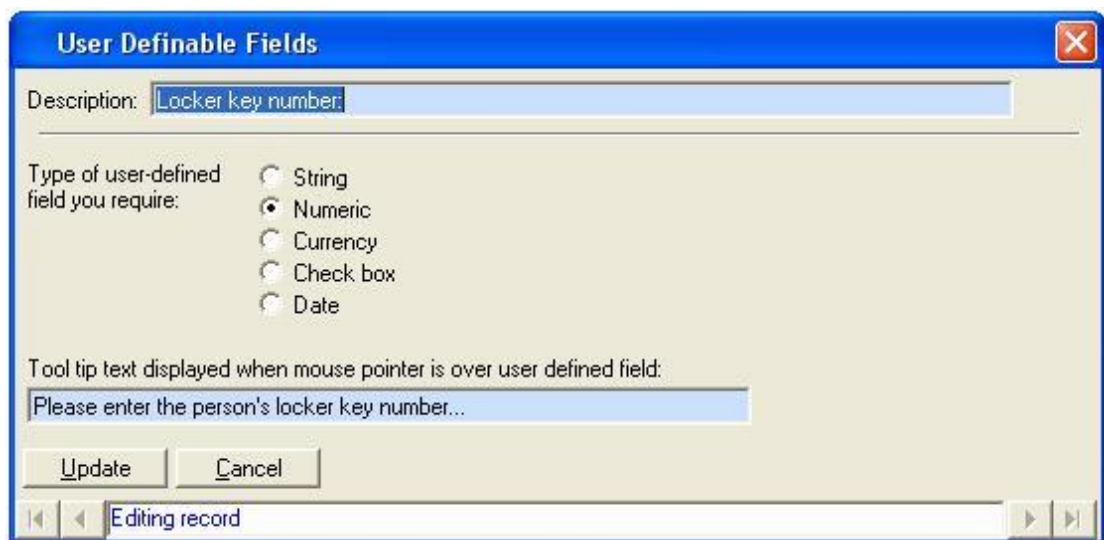
20. Accident codes are used in the Personnel, Miscellaneous, Accident screen.

A screenshot of a software window titled "Accident". The window has a blue header bar with the title and a red close button. Below the header, there are two text input fields. The first is labeled "Code:" and contains the text "ACCM1". The second is labeled "Description:" and contains the text "Minor accident requiring A&E visit". Below these fields are two buttons: "Update" and "Cancel". At the bottom of the window, there is a status bar with a left arrow, a right arrow, and the text "Editing record".

There are a number of pre-defined accident codes.

Additional accident codes may be added by the user.

21. User Defined Fields are used in the Personnel, General, User Defined screen. UDFs are used to define fields for data that are not covered elsewhere by the system. For example, if a company requires to log each person's locker key number, a UDF can be created to store this information.



User Definable Fields

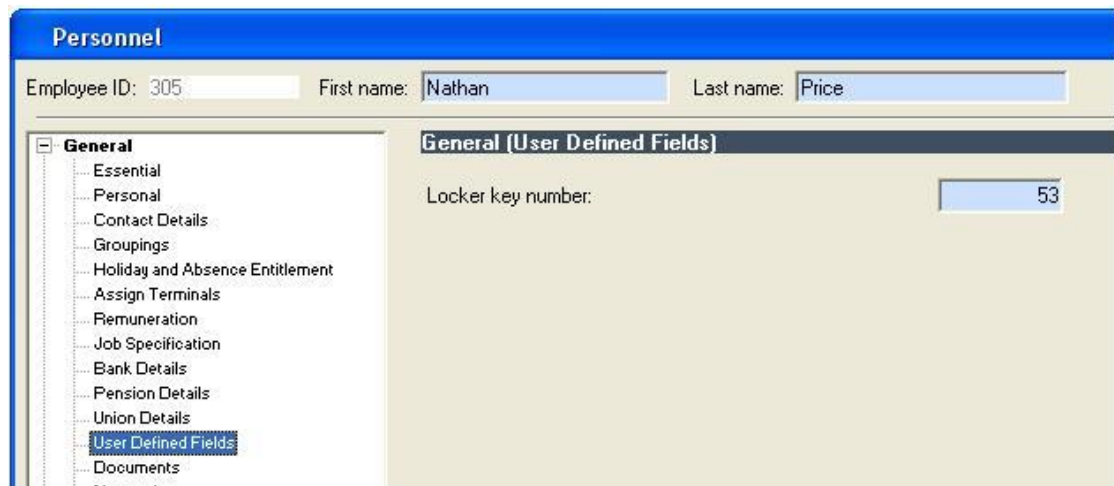
Description:

Type of user-defined field you require:

- ☐ String
- ☒ Numeric
- ☐ Currency
- ☐ Check box
- ☐ Date

Tool tip text displayed when mouse pointer is over user defined field:

Editing record



Personnel

Employee ID: First name: Last name:

General (User Defined Fields)

Locker key number:

General

- Essential
- Personal
- Contact Details
- Groupings
- Holiday and Absence Entitlement
- Assign Terminals
- Remuneration
- Job Specification
- Bank Details
- Pension Details
- Union Details
- User Defined Fields**
- Documents

Multiple UDFs may be created by the user.



Notes