

Biographical

In this module we will cover:

1. Menu and Window Overview
2. The Add Employee Wizard
3. Maintenance Windows

Menu & Window Overview

Outcome: *To explain where you could find a report detailing employee skills.
Explain where a payroll person would look for data on an employee*



Personnel Maintenance

At this point we are merely providing an overview of the windows at a later stage the data entered using the wizard will be reviewed in the windows.

1. This level contains windows used to maintain data
 - A. Maintain Personnel Details
 - 1) This is used by a person looking after the Administration details for an employee
 - B. Maintain Employee / Client Special Rates
 - 1) This is used to setup special pay rates when a specific employee works for a specific client
 - C. Maintain Personnel Availability
 - 1) This is used by a person maintaining the schedules
 - D. Maintain Personnel Rates
 - 1) This is used by a person looking after Payroll details
 - E. Maintain Operational Details
 - 1) This is used by a person maintaining the schedules

Personnel Enquiry

1. This level contains a summary information window
 - A. Personnel Summary
 - 1) This is used by person looking after Payroll details

Personnel Reports

1. These reports cover
 - A. Employee Skills report
 - B. Licence Register
 - C. Employee Masterfile reports
 - D. Employee Details

Biographical Processes

1. This option allows you to:
 - A. Transfer an Employee
 - B. Classification Codes Delete

Add Employee Wizard

Outcome: *Demonstrate how to create an Employee using the “Add Employee Wizard”*

Completing the Wizard

The “Employee Wizard” will prompt you for all the required details necessary to construct an employee record.

Practice

1. To create an employee, click “Wizards” in the lower part of the left navigator view
2. From the choices available on the right, double click “Add Employee”

Fields to Note	
Company or Entity	Select the name of the organisation that will be used to pay the employee (your Company). The value will default to the current company.
Manually Assign Number	Check this option to enter your own employee number. If not checked the system will assign an employee number automatically.

Fields to Note	
Setup Payroll	At the end of the wizard an additional 2 windows will be displayed prompting you for information about Pay Cycles, Account codes and Tax file information for the employee.
Setup Superannuation	At the end of the wizard an additional window will allow you to setup company and employee superannuation payment details.

1. Complete the fields as per the example and click the Next button to continue completing the wizard

Enter in The persons Details

* First Name	<input type="text" value="JOHN"/>
Middle Name	<input type="text" value="PETER"/>
* Surname	<input type="text" value="PRACTICE"/>
Preferred Name	<input type="text" value="PETER"/>
Title	<input type="text" value="MR"/>
Former Name	<input type="text" value="BILL PRACTICE"/>
Previous Name	<input type="text" value="BILL TRAINING"/>
Date of Birth	<input type="text" value="12/01/1975"/>
Marital Status	<input type="text" value="SINGLE"/>
	<input checked="" type="radio"/> Male <input type="radio"/> Female

Fields to Note	
Preferred Name	A name such as a nickname or an abbreviation that the employee prefers to use.
Former Name	The name the employee used before their current name.
Previous Name	The name the employee used before their former name.

2. Complete the fields as per the example and click the Next button to continue completing the wizard

This section accepts Address and Residency Details

Address

Suburb

State Postcode

Country

Citizenship

Nationality

Resident

Work Permit

- Complete the fields as per the example and click the Next button to continue completing the wizard

Enter in any Relevant Contact Details

	Contact	Number	Notes
1	HOME	02 9635 5922	
2	FAX	02 9635 5933	
3			
4			
5			

Enter in any Relevant Relative and Next of Kin Details

	Contact Name	Number	Relationship
1	Paul Training	02 9786 5446	Brother
2			
3			
4			
5			

Note: If you wish to use our SMS module a contact type of Mobile must be setup.

- Double click the "Contact" to display a list of available contacts types
- Complete the fields as per the example and click the Next button to continue completing the wizard

This Section Accepts Employment Details

* **Date of employment** 04/02/2002 ▼

Employment review date 06/05/2002 ▼

* **Type of Employment** FULLTIME ▼

* **Classification of Employment** LVL1 ▼

Default cost centre 01 ▼

Subcontractor ▼

On Call Close Shift

Long Week Long Day

Fields to Note	
Photo ID	This field is used to select the graphics file containing the employee's photo. It is advantageous to have a photo file numbering system that will make it easy to find the correct employee.
Default cost Centre	This is the General Ledger cost centre to be used with this employee.
Subcontractor	If a value is selected in this window the employee's pay will be made as a payment to the selected subcontracting company and will not appear in the pay run.
On Call	The employee is available to be called up to do additional work.
Long Week	The employee is prepared to work additional days in a week.
Close Shift	The employee will work until the client decides that the business is closed for the day.
Long Day	The employee is prepared to work additional hours in a day.

6. Complete the fields as per the example and click the Next button to continue completing the wizard

Enter in any Valid Licences held by the Employee				
	License	Number	Expiry	
1	SECL	123456	21/12/2004	▲
2				
3				▼

Enter in any Skills held by the employee				
	Skill	Attained	Comment	
1	CRWD	12/01/2000		▲
2				
3				▼

Enter in any Specific Roles the employee is qualified for				
	Role Code	Description		
1	SG			▲
2				
3				▼

Enter in any Specific Areas the employee can work				
	Location	Description		
1	CBD			▲
2	CITY			
3				▼

7. Double click to display a list box for
- Licence
 - Skills
 - Role Code
 - Locations

Fields to Note	
Licence	Required training for a position. Typically the training must be reviewed or renewed at regular intervals.
Skills	Required training that does not expire.
Role Code	The type of work the employee can perform.
Location	Preferred work area(s). Geographical locations within the company's customer base.

8. Complete the fields as per the example and click the Next button to continue completing the wizard

Payroll Processing details

Pay Cycle: WEEKLY

Pay Advice Style: Detailed Summary

Advice Delivery: Printed Emailed

Payment Method: Cash Cheque Electronic

BSB: 000-000

Account Number: 123-456

Account Name: BILL TRAINING

Fields to Note	
Pay Cycle	Employees pay period.
Payment Method	“Electronic” will change “BSB”, “Account Number” and “Account Name” to required fields.

9. Complete the fields as per the example and click the Next button to continue completing the wizard

This Section Sets up Tax File Number Reporting

Tax File Number: 123 456 789 741 Authority to give TFN to Superannuation Fund

Tax Waiver Date: 04/02/2002 Australian Resident for Tax Purposes

Tax Table: 02 Tax Free Threshold Claimed

Student Financial Support Scheme

Do you have a HECS debt

Tax Rebates

Family Tax Benefit Claimed

Zone, Dependent Spouse or Special Rebate?

Annuity or Superannuation Pension Rebates?

Rebates:

Fields to Note	
Tax Rebates	Consult the Australian Tax office for definitions and applicability of the various fields.
Rebates	This is a dollar value taken as a rebate every pay

10. Complete the fields as per the example and click the Next button to continue completing the wizard

This Section Sets up Superannuation Details

Company Contribution Superannuation Fund	AMP
Policy Number	123-789
Voluntary Superannuation Fund	TOW
Policy Number	789-456
Contribution Will be	<input checked="" type="radio"/> Before Tax <input type="radio"/> After Tax
Contribution Per Pay	15.00

11. Complete the fields as per the example and click the Next button to continue completing the wizard

Add Employee Wizard

All the required details have been entered to create a new employee.
Choose **FINISH** to create the employee or **BACK** to change details

Back Finish Cancel

12. Click the Finish button to create the employee



13. Click the Ok button to acknowledge creation of the client

Maintenance Windows

Outcome: *List windows that may be used to change an employee’s photograph*
 State where you could find an employee’s “Next of Kin”
 State where you could store employee notes
 State where you would find an employee’s “Work Preferences”

Overview

These windows are used to update data entered through the “Employee” wizard and add additional data not required in the wizard.

Following is an overview of fields available from the indicated windows and tabs within these windows.

Maintain Personnel Details

Personal Details

Employee No: Name:

Surname	First name	Middle Name	Preferred
<input type="text" value="ADAMS"/>	<input type="text" value="ANTHONY"/>	<input type="text" value="JOHN"/>	<input type="text" value="TONY"/>

Sex: Marital Status: D.O.B.: Age:

Address Phone Employment Specs Next of Kin Dependants

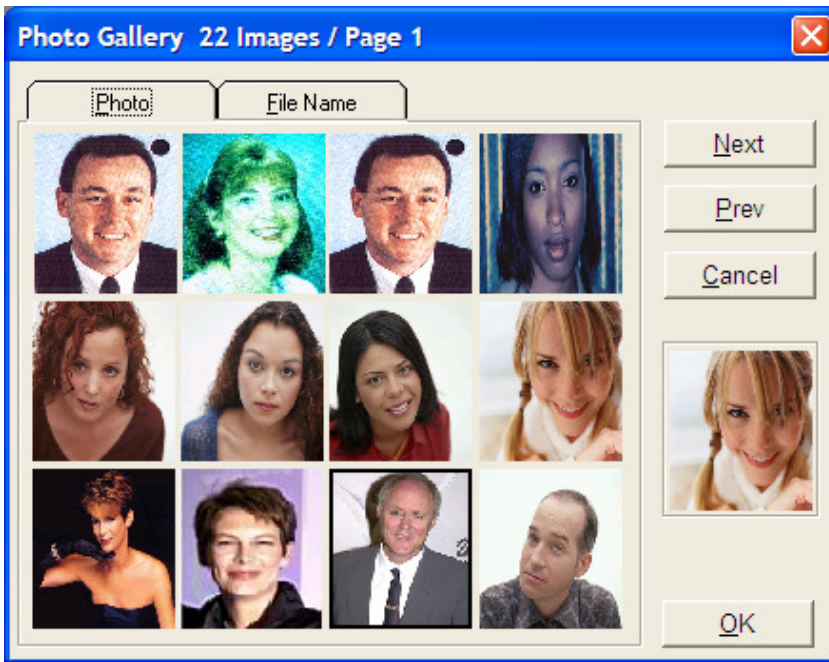
Title: Former Name: Prev Name:

Address: Country: Resident

Suburb: Citizenship: Work Permit

State: Postcode: Nationality:

1. Gallery Gallery button
 - A. Click this button to display the picture gallery
 - B. Click on a picture to select it
 - C. Click the Ok button to assign it to an employee



2. The "Address" tab
 - A. This is the default tab when the window opens
3. The "Phone" tab

Type	Number	Notes
HOME	2578 6985	
MOBILE	0412 569 785	

4. The "Employment" tab

Employing company: Employment date: Termination date: Service:

Inactive Termination Reason: Re-Hire

Subcontractor: Badge Number: Default cost centre: Employment type:

Fields of Note	
Inactive	Check this box to stop this employee from being displayed or used by the system.

5. The "Specs" tab

License type	Description	Number	Expiry
SECL	Standard Security License	K-45896	25/11/2004
DL	Drivers License	I-45896	15/08/2004

6. The “Next of Kin” tab

Relatives name	Contact	Relationship
Helen Adams	2578 6985	Spouse

7. The “Dependants” tab

Dependants details			
Surname	First name	Relationship	Birthdate
Adams	Jimmy	Son	23/02/1993


Maintain Personnel Rates

Personal Rates

Employee No: Name:

Surname	Firstname	Middlename	Preferred
<input type="text" value="ADAMS"/>	<input type="text" value="WILLIAM"/>	<input type="text" value="JOHN"/>	<input type="text" value="BILL"/>

Sex: Marital Status: Birthdate: Age:



Position
Rates
Allow/Dedns
Payment
Super
Tax
Notes

Active Classification Code:

<input type="text" value="10"/>	<input type="text" value="ENTERPRISE GUARD L1"/>	Date Hired	<input type="text" value="14/01/2002"/>
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Active Type of Employment:

<input type="text" value="ENTERPRI"/>	<input type="text" value="Perm Enterprise"/>	Daily Base Hours:	<input type="text" value="42.00"/> Per Week: <input type="text" value="42.00"/>
		Base Hours Override:	<input type="text"/> <input type="checkbox"/> Apply to all Classes

1. Position tab
 - A. This is the default tab when the window opens

B. It shows the employees current classification and current employment type

2. Rates tab

A. This window shows current rates based on the classification code selected

Default Rates		Override Rates		Pay cycle:	
Normal Hourly Rate:	12.6800	Normal Hourly Rate:		WEEKLY	
Overtime 1:	20.9500	Overtime 1:		Nml Hrs/Pay	42.00
Overtime 2:	20.9500	Overtime 2:		Cost Centre	01
Overtime 3:	27.1600	Overtime 3:			
Overtime 4:	.0000	Overtime 4:			

Code	Split		

3. Allow/Dedns tab

A. Double click a row to select an Allowance / Deduction then complete the remaining fields

Description	Amt	Amt/Pay	Start	End	Balance
First Aid	10.87	10.87	01/02/2002		

4. Payments tab

A. This table shows a history of payments made to this employee

Bank bsb	Bank/Branch	Account No	Account name	Amount
012-044	ANZ PARRAMATT	314687	WILLIAM ADAMS	.00

5. Super tab

A. This table shows a history of payments made to this employee superannuation fund

Company Super Fund	Fund Name	Contribution%	Policy No
AMP	AMP	9.00	3216461

Voluntary Superannuation Authority to Release TFN to Super Fund

Fund	Fund name	Policy No	Tax	Amount	
1	TOW	Tower Life	189-4589	Before Tax	15.00
2					
3					

6. Tax tab

A. This tab shows details for the employee’s payment summary

Tax file number:	<input type="text" value="254 125 789 698"/>	<input checked="" type="checkbox"/> Tax Free Threshold	<input type="checkbox"/> Superannuation/Annuity Rebate
Tax waiver date:	<input type="text" value="14/01/2002"/> ▼	<input type="checkbox"/> HECS Debt	<input type="checkbox"/> Family Tax Benefit
Tax table:	<input type="text" value="02"/> ▼	<input type="checkbox"/> SFSS	<input checked="" type="checkbox"/> Resident for Taxation Purposes
Rebates:	<input type="text" value=".00"/>	<input type="checkbox"/> Zone/Dependant Rebate	

Maintain Personnel Availability

This window provides a year planner view of the employee.

Availability Planner for ANTHONY JOHN ADAMS PWR-002 2002

Palette Selected 365 Days

January							February							March							April						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
		1	2	3	4	5	3	4	5	6	7	8	9	3	4	5	6	7	8	9	7	8	9	10	11	12	13
6	7	8	9	10	11	12	10	11	12	13	14	15	16	10	11	12	13	14	15	16	14	15	16	17	18	19	20
13	14	15	16	17	18	19	17	18	19	20	21	22	23	17	18	19	20	21	22	23	21	22	23	24	25	26	27
20	21	22	23	24	25	26	24	25	26	27	28			24	25	26	27	28	29	30	28	29	30				
27	28	29	30	31								1	2	31													

May							June							July							August						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
			1	2	3	4	2	3	4	5	6	7	8	7	8	9	10	11	12	13	4	5	6	7	8	9	10
5	6	7	8	9	10	11	9	10	11	12	13	14	15	14	15	16	17	18	19	20	11	12	13	14	15	16	17
12	13	14	15	16	17	18	16	17	18	19	20	21	22	21	22	23	24	25	26	27	18	19	20	21	22	23	24
19	20	21	22	23	24	25	23	24	25	26	27	28	29	28	29	30	31				25	26	27	28	29	30	31
26	27	28	29	30	31		30																				

September							October							November							December						
S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S
									1	2	3	4	5						1	2	1	2	3	4	5	6	7
8	9	10	11	12	13	14	6	7	8	9	10	11	12	3	4	5	6	7	8	9	8	9	10	11	12	13	14
15	16	17	18	19	20	21	13	14	15	16	17	18	19	10	11	12	13	14	15	16	15	16	17	18	19	20	21
22	23	24	25	26	27	28	20	21	22	23	24	25	26	17	18	19	20	21	22	23	22	23	24	25	26	27	28
29	30						27	28	29	30	31			24	25	26	27	28	29	30	29	30	31				

Locked Modified

Palette

- Planned Off
- Planned On
- Booked (11.8%) 43 days
- No Show
- Workers Comp
- Training
- Available (88.5%) 323 days
- Partial Availability
- Not Available
- Annual Leave
- RDO
- Sick

Show Changes

Maintain Operational Details

The purpose of this window is to keep records of the employees day-to-day work activities.

The screenshot shows the 'Employee Operations <Active>' window. The employee details are as follows:

Employee:	First name:	Middle name:	Surname:
PWR-002	ANTHONY	JOHN	ADAMS
Preferred name	Position	Cost Centre	Payroll Company
TONY	ENTERPRISE GUARD	01	POWERFORCE TRAINI
Address:	Employment Date	Termination date	
1313 Mocking Bird Lane	07 JAN 2002		
Suburb:	Birth date	Review date	
PARRAMATTA	24 MAR 1978	08 APR 2002	
State:	Post Code:		
NSW	2150		

Below the form are tabs for: Next of Kin, Specs, Exclusions, History, Personal, Education, Preference, Profile, and Phone. A table of relatives is shown below the tabs:

Relatives name	Contact	Relationship
Helen Adams	2578 6985	Spouse

Buttons on the right side of the window include: Save, Exit, Set Inactive, Availability, and Preference.

1. Set Inactive button
 - A. Click to set the employee inactive or active
2. Availability button
 - A. Displays the “Maintain Personnel Availability” window
3. Preferences button
 - A. Sets employee scheduling preferences
 - B. This window is primarily used with the “Optimised Scheduler” – an additional PowerForce module
4. Next of Kin tab
 - A. This is the default tab when the window opens
5. Specs tab
 - A. Lists licences held by the employee
 - B. In PowerForce a licence is training that must be renewed i.e. it expires
 - C. Double click an empty row to add a new licence

License type	Description	Number	Expiry	Image
SECL	Standard Security License	K-45896	25/11/2004	
DL	Drivers License	I-45896	15/08/2004	

6. Exclusions tab

- A. These fields display a list of sites from which the employee has been excluded
- B. Double click Location to select a client
- C. Tab across as you complete the row

Location	Name	From Date	To Date	Reason
POW-TAS	POWERFORCE TAS	34/02/2002		offended client

7. History tab

- A. This tab lists sites the employee has worked

Location	Name	Dates	Hours	Briefed	Date	Rates
POW-NSW	POWERFORCE NSW	/02/2002-26/04/20	334.25	Yes	26/04/2002	No

8. Personal tab

Work Notes	Other Notes
Presents well to the customer - use when our image is important	Doing a management course at TAFE - maybe handy in the office

9. Education tab

- A. Lists skills held by the employee
- B. In PowerForce a skill is training that does not need to be renewed i.e. it does not expire
- C. Double click an empty row to add a new licence

Skill	Description	Attained	Comment	Image
CRWD	Crowd Control	08/06/199:		
STATIC	Static Guard	23/08/199:		

10. Preference tab

- A. This window is primarily used with the “Optimised Scheduler” – an additional PowerForce module

Role	Description	Region	Description
GEN_SECURITY	General Security	CBD	Central Business Dis
CCTV	CCTV	CITY	City - General
		EAST	Eastern Suburbs

Preferences

On Call

Close Shifts

Long Week

Long Day

11. Profile tab

- A. Allow the user to define details about an employee
- B. This window is primarily used with the “Optimised Scheduler” – an additional PowerForce module

Code	Description	Criteria
HGT	Height	175cm
LANG	Language	English
LANG	Language	French

12. Phone

- A. To make use of PowerForce SMS module an employee must have a mobile phone defined

Type	Number	Notes
HOME	2578 6985	
MOBILE	0412 569 785	