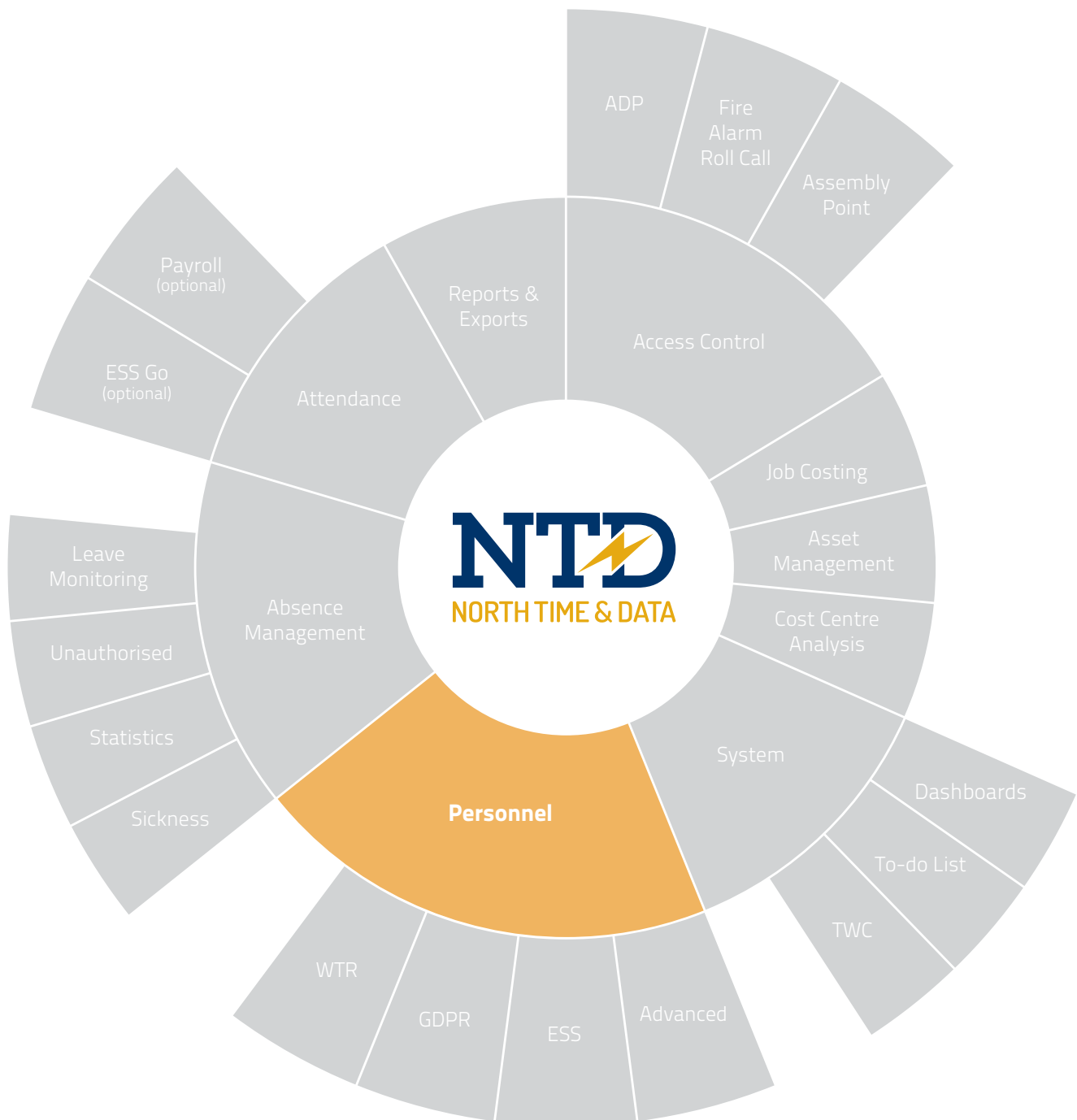


Training guide:

Basic Personnel



For more information about North Time Pro products, version updates, datasheets and reports, please refer to the North Time Pro website:

www.ntdltd.com

We acknowledge the intellectual property rights of third parties, trade marks and brand names used within this document.

North Time Pro

www.ntdltd.com
+44 (0) 2892 604000



Contents

Course

Duration

tw21/op/per001

Approximately 30 minutes

An introduction to North Time Pro personnel

Adding a personnel record, amending a personnel record and setting an employee as a leaver in North Time Pro personnel.

Module

Description

m/02/101	understanding North Time Pro 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 North Time Pro personnel

At the heart of the North Time Pro 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 North Time Pro 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 North Time Pro Personnel database interface with three overlapping windows for Employee ID: 1, First name: Dave, Last name: Webb.

Essential (General) Window:

- Badge format: 26 bit
- Facility code: 0
- Badge: 1
- Payroll: 1
- Integration ID:
- GPS IMEI:
- Known as: Webb, Dave
- Email address: dave.webb@time.co.uk
- Security pin:
- Biometric data: ☒ Finger (Suprema), ☒ Finger (SecuGen)
- Date started with company: 31/10/2009
- Badge activation:
- Employment status: Employee
- Absence entitlement policy: 20 Days Holiday
- Period schedule: 06:00-14:00/14:00-22:00
- Terminal policy: All Terminals
- Email policy: Not Required
- Remuneration policy: Not Required

Essential (Groupings) Window:

The fields below are used for grouping employees together. This is mainly for reporting purposes and enquiries.

- Company: A B Manufacturing
- Department: Steel Prep
- Section: Supervisor
- Pay Type: Hourly Paid
- Line Manager:
- Grouping 06:
- Grouping 07:
- Grouping 08:
- Grouping 09:
- Grouping 10:

Essential (Employment) Window:

Drag a column header here to group by that column.

Reference	Job Description	Date of Commencement	Date of Termination	Status
Supervisor	Supervisor	Sat 31 Oct 2009		Active

Record 1 of 94



Module:

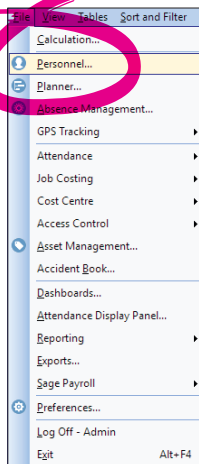
m/02/110

Adding a new employee

1. To access the North Time Pro 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.

Personnel

Employee ID: 1 First name: Dave Last name: Webb

Essential (General)

Badge format: 26 bit - NMD3
 Facility code: 0
 Badge:
 Payroll: 1
 Integration ID:
 GPS IMEI:
 Known as: Webb, Dave
 Email address: dave.webb@time.co.uk
 Security pin:
 Biometric data:
 Date started with company: 31/10/2009 10 years, 11 month(s), 25 day(s)
 Badge activation:
 Employment status: Employee Current employment: Supervisor
 Absence entitlement policy: 20 Days Holiday
 Period schedule: 06:00-14:00\14:00-22:00\22:00-06:00 Week rotation: 1
 Terminal policy: All Terminals
 Email policy: Not Required
 Remuneration policy: Not Required
 Cost centre (default):
 Flexitime closing balance set on: / / Amount:
 Add Edit Delete Find... Refresh Preview... Copy... Close

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: webbd@blueyonder.co.uk
 Security pin:
 Biometric data:
 Date started with company: 24/01/2007 13 years, 9 month(s), 2 day(s)
 Badge activation:
 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: 2
 Terminal policy: All Terminals
 Email policy: Not Required
 Remuneration policy: Not Required
 Cost centre (default):
 Flexitime closing balance set on: / / Amount:
 Add Edit Delete Find... Refresh Preview... Copy... Close

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

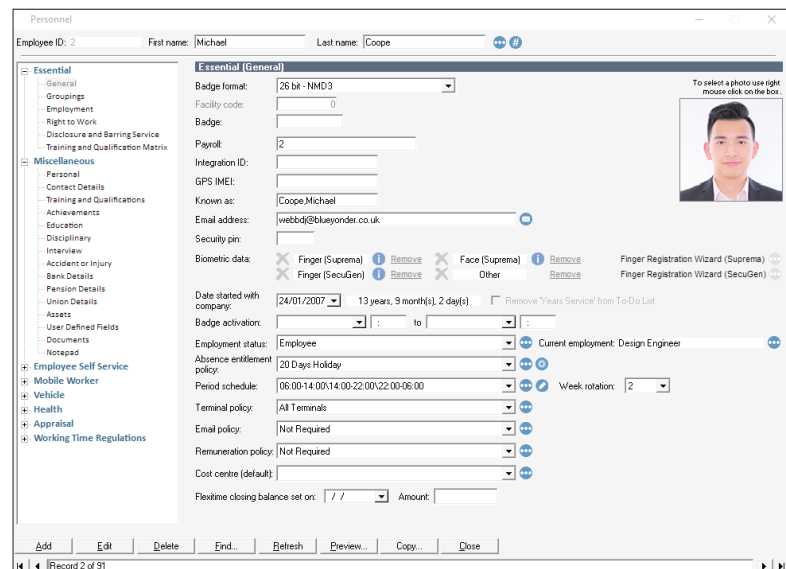
This defines the person's holiday allowance i.e. 28 days per year. The system gives a running total of absence entitlement based on absences (holidays) booked throughout the year. See Absence Management training guide for more info!

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 North Time Pro 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!



4. 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.

Personnel

Employee ID: First name: Michael Last name: Cooper

Essential (Groupings)

The fields below are used for grouping employees together. This is mainly for reporting purposes and enquiries.

Company: Fabrication
 Department: Engineering
 Section: Engineer
 Pay Type:
 Line Manager:
 Grouping 06:
 Grouping 07:
 Grouping 08:
 Grouping 09:
 Grouping 10:

Update Cancel

Adding new record

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

Personnel

Employee ID: First name: Michael Last name: Cooper

Essential (Employment)

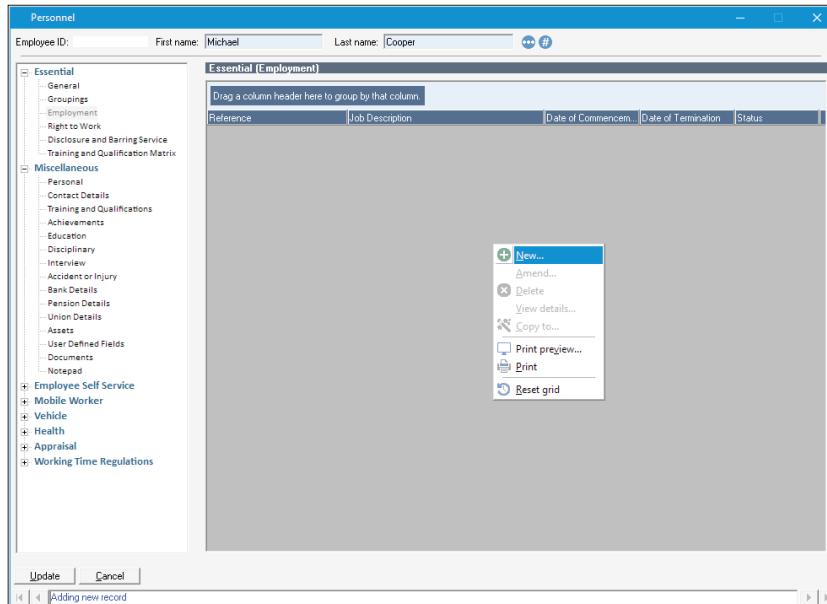
Drag a column header here to group by that column.

Reference	Job Description	Date of Commencement	Date of Termination	Status
-----------	-----------------	----------------------	---------------------	--------

Update Cancel

Adding new record

5. Right click and press <New>



Complete the following fields;

Reference

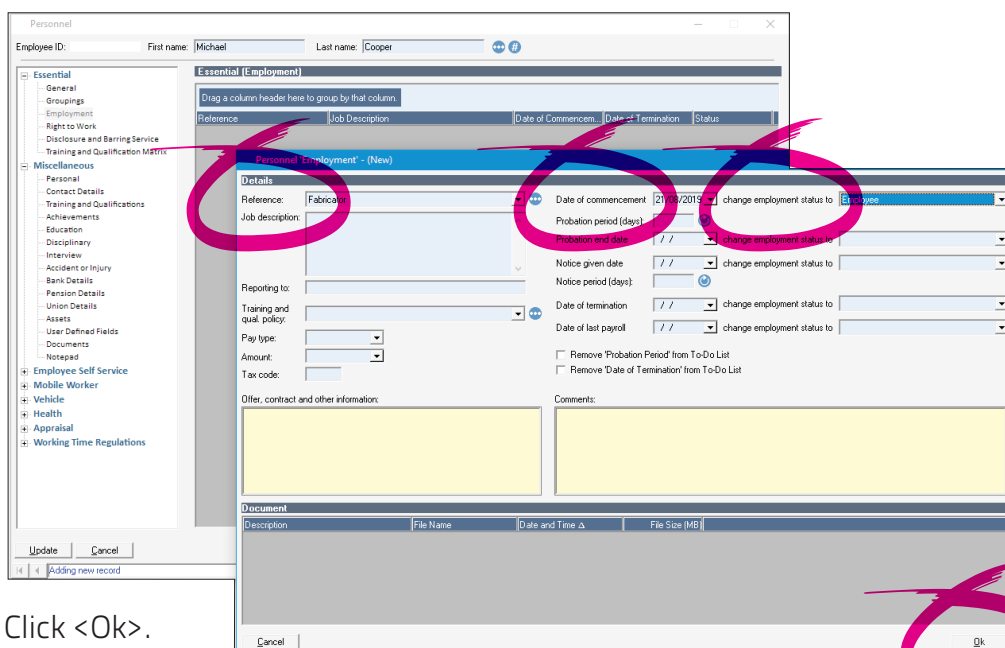
The person's job role i.e. Fabrication Manager or Accountant.

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>.

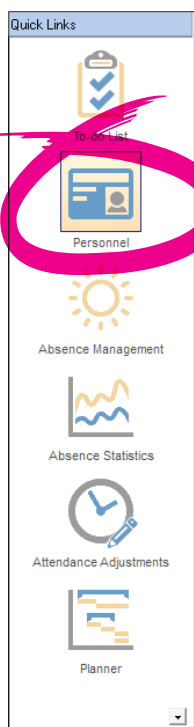


Module:

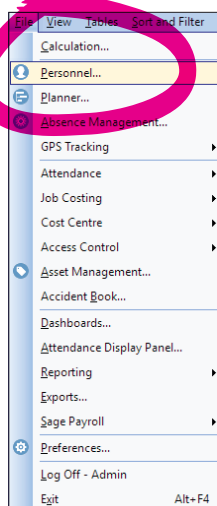
m/02/120

Making amendments to an existing employee

1. To access North Time Pro personnel, select the Personnel Quick Link,



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



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

Personnel

Employee ID: 1 First name: Dave Last name: Webb

Essential (General)

Badge format: 26 bit - NMD3
Facility code: 0
Badge:
Payroll: 1
Integration ID:
GPS IMEI:
Known as: Webb, Dave
Email address: dave.webb@time.co.uk
Security pin:
Biometric data:
Date started with company: 31/10/2009 10 years, 11 month(s), 25 day(s)
Badge activation:
Employment status: Employee Current employment: Supervisor
Absence entitlement policy: 20 Days Holiday
Period schedule: 06:00-14:00\14:00-22:00\22:00-06:00 Week rotation: 1
Terminal policy: All Terminals
Email policy: Not Required
Remuneration policy: Not Required
Cost centre (default):
Flextime closing balance set on: / / Amount:
Add Edit Delete Find... Refresh Preview... Copy... Close

Press <Find> to show list of all North Time Pro records.

Find: Personnel

Search for:
Search through: Employee ID
Search type: Contains

Drag a column header here to group by that column.

Employee ID	Payroll	First Name	Last Name	Known As	Emplo
1	1	Dave	Webb	Webb,Dave	Empl
2	2	Michael	Coope	Coope,Michael	Empl
3	3	Simon	Birchall	Birchall,Simon	Empl
4	4	Matt	Wilkinson	Wilkinson,Matt	Empl
5	5	Liz	Broadhurst	Broadhurst,Liz	Empl
6	6	George	Zelem	Zelem,George	Empl
7	7	Lesley	Wilkinson	Wilkinson,Lesley	Empl
8	8	Phillip	Briggs	Briggs,Phillip	Empl
9	9	Marie	Tre	Tre Marie	Fmn

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 with the 'Essential (General)' tab selected. The form contains the following fields and options:

- Employee ID:** 2
- First name:** Michael
- Last name:** Coope
- Badge format:** 26 bit - NMD3
- Facility code:** 0
- Badge:** [Empty field]
- Payroll:** 2
- Integration ID:** [Empty field]
- GPS IMEI:** [Empty field]
- Known as:** Coope, Michael
- Email address:** webbdj@blueyonder.co.uk
- Security pin:** [Empty field]
- Biometric data:**
 - Finger (Suprema) [X] Remove
 - Face (Suprema) [X] Remove
 - Finger (SecuGen) [X] Remove
 - Other [X] Remove
 - Finger Registration Wizard (Suprema) [X]
 - Finger Registration Wizard (SecuGen) [X]
- Date started with company:** 24/01/2007 (13 years, 9 month(s), 2 day(s))
- Badge activation:** [Empty field] to [Empty field]
- Employment status:** Employee
- Absence entitlement policy:** 20 Days Holiday
- Period schedule:** 06:00-14:00\14:00-22:00\22:00-06:00
- Terminal policy:** Office Access Mon to Fri Only
- Email policy:** Not Required
- Remuneration policy:** Not Required
- Cost centre (default):** [Empty field]
- Flexitime closing balance set on:** / /
- Amount:** [Empty field]

The 'Edit' button at the bottom left is circled in pink. The status bar at the bottom indicates 'Record 2 of 91'.

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

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) ☒ Finger (SecuGen) ☒ Face (Suprema) ☒ Other
Finger Registration Wizard (Suprema) ☒ Finger Registration Wizard (SecuGen) ☒
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):
Flextime closing balance set on: / / Amount:
Add Edit Delete Find... Refresh Preview... Copy... Close

Click <Close> to leave Personnel.

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) ☒ Finger (SecuGen) ☒ Face (Suprema) ☒ Other
Finger Registration Wizard (Suprema) ☒ Finger Registration Wizard (SecuGen) ☒
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):
Flextime closing balance set on: / / Amount:
Add Edit Delete Find... Refresh Preview... Copy... Close

Module:

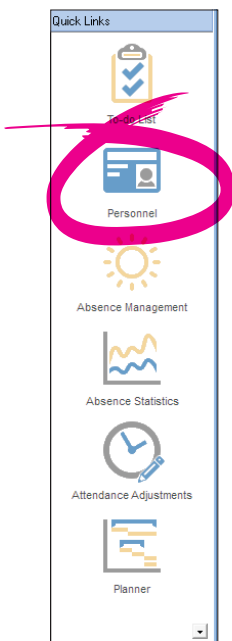
m/02/130

Setting an employee to a leaver

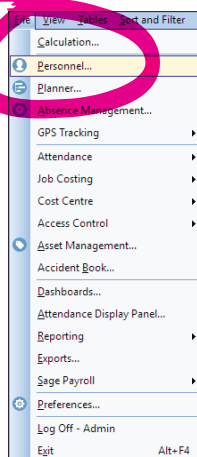


The act of deleting a personnel record removes all data for the person, including historic bookings and absences. Everything associated with that person gets removed! With this in mind, we strongly recommend against deleting personnel records – instead we recommend modifying the person's status to leaver.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

1. To access North Time Pro personnel, select the Personnel Quick link,



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



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

Personnel

Employee ID: 1 First name: Dave Last name: Webb

Essential

- General
- Groupings
- Employment
- Right to Work
- Disclosure and Barring Service
- Training and Qualification Matrix

Miscellaneous

- Personal
- Contact Details
- Training and Qualifications
- Achievements
- Education
- Disciplinary
- Interview
- Accident or Injury
- Bank Details
- Pension Details
- Union Details
- Assets
- User Defined Fields
- Documents
- Notepad

Employee Self Service

- Mobile Worker
- Vehicle
- Health
- Appraisal
- Working Time Regulations

Essential (General)

Badge format: 26 bit - NMD3

Facility code: 0

Badge:

Payroll: 1

Integration ID:

GPS IMEI:

Known as: Webb, Dave

Email address: dave.webb@time.co.uk

Security pin:

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

Date started with company: 31/10/2009 10 years, 11 month(s), 25 day(s) ☐ Remove 'Years Service' from To-Do List

Badge activation: : to :

Employment status: Employee Current employment: Supervisor

Absence entitlement policy: 20 Days Holiday

Period schedule: 06:00-14:00\14:00-22:00\22:00-06:00 Week rotation: 1

Terminal policy: All Terminals

Email policy: Not Required

Remuneration policy: Not Required

Cost centre (default):

Flexitime closing balance set on: / / Amount:

Add Edit Delete Find... Refresh Preview... Copy... Close

Record 1 of 91

Press <Find> to show list of all North Time Pro records.

Find: Personnel

Search for:

Search through: Employee ID

Search type: Contains

Drag a column header here to group by that column.

Employee ID	Payroll	First Name	Last Name	Known As	Employment Status
1 1		Dave	Webb	Webb, Dave	Employee
2 2		Michael	Coope	Coope, Michael	Employee
3 3		Simon	Birchall	Birchall, Simon	Employee
4 4		Matt	Wilkinson	Wilkinson, Matt	Employee
5 5		Liz	Broadhurst	Broadhurst, Liz	Employee
6 6		George	Zelem	Zelem, George	Employee
7 7		Lesley	Wilkinson	Wilkinson, Lesley	Employee
8 8		Phillip	Briggs	Briggs, Phillip	Employee
9 9		Marie	Tree	Tree, Marie	Employee
10 10		Nathan	Louis	Louis, Nathan	Employee
11 11		Hannah	Shaw	Shaw, Hannah	Employee

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

Personnel

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

Essential

- General
- Groupings
- Employment
- Right to Work
- Disclosure and Barring Service
- Training and Qualification Matrix
- Miscellaneous
- Personal
- Contact Details
- Training and Qualifications
- Achievements
- Education
- Disciplinary
- Interview
- Accident or Injury
- Bank Details
- Pension Details
- Union Details
- Assets
- User Defined Fields
- Documents
- Notepad
- Employee Self Service
- Mobile Worker
- Vehicle
- Health
- Appraisal
- Working Time Regulations

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) Remove
- Face (Suprema) Remove
- Finger (SecuGen) Remove
- Other Remove
- Finger Registration Wizard (Suprema)
- Finger Registration Wizard (SecuGen)

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 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

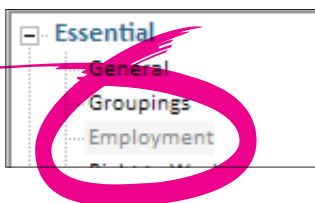
Cost centre (default):

Flexitime closing balance set on: / / Amount:

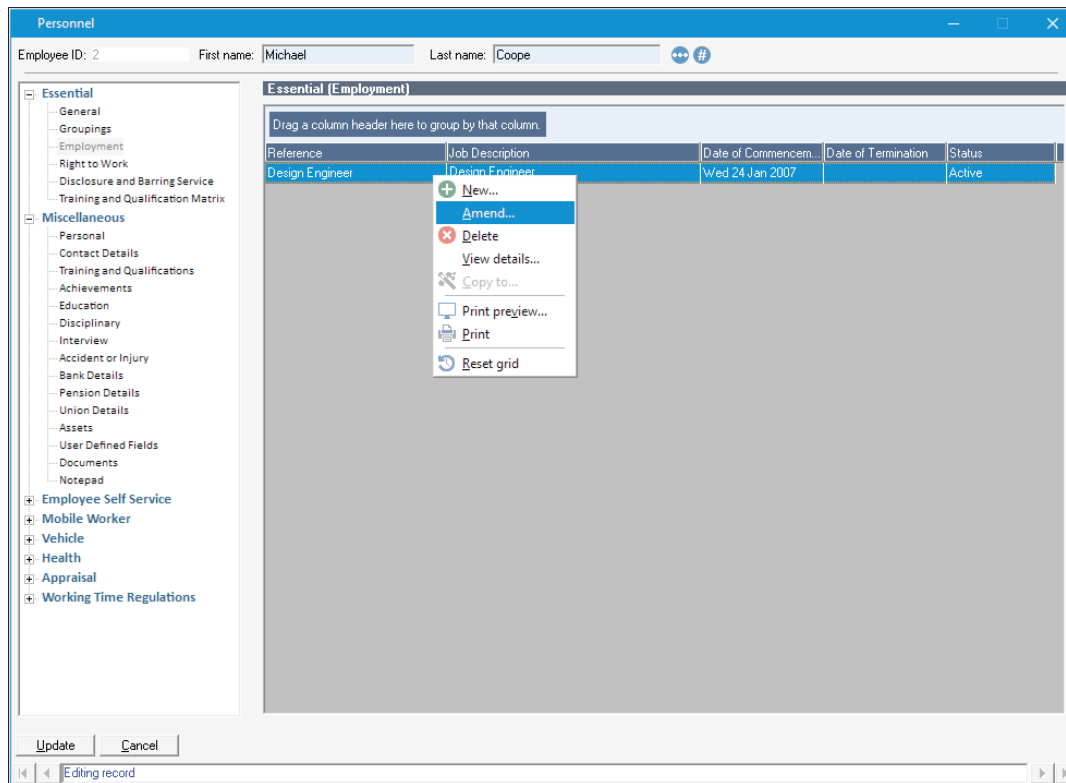
Add Edit Delete Find... Refresh Preview... Copy... Close

Record 2 of 91

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
Reporting to:
Training and qual. policy:
Pay type:
Amount:
Tax code:
Offer, contract and other information:
Comments:

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:

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

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)

Drag a column header here to group by that column.

Reference	Job Description	Date of Commencement	Date of Termination	Status
Design Engineer	Design Engineer	Wed 24 Jan 2007		Active

New... Amend... Delete View details... Copy to... Print preview... Print Reset grid

Update Cancel

Editing record

Then click <Update>.