



Essentials Edition

Version: 1.0

Personnel

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About Personnel

The Personnel (TSI) in is an essential part of Essentials Edition . It can help streamline all your personnel related processes. Whether you want to add, modify or delete personnel data or archive persons, the Personnel TSI enables you to do this.

This user documentation contains information on how to manage the personal, functional and work-related data of your employees and how to register person data effectively and centrally. In the Personnel TSI you can link personnel, departments, work addresses, etc.

Personnel – Concepts

This section describes the concepts available in Personnel and how they interact with each other.

Departments

On the **Components** selection level, use the **Departments** step to retrieve people of a particular department. Depending on your settings, selecting one or more departments in this selection step enables you to retrieve all people working there.



Departments can be added and maintained in Supporting data .

If you select a department on the **Departments** selection step and then go to the **Personnel** selection level and add a new person, the **Department** data field will automatically inherit the name and the code of the selected department.



The ability to inherit the name and the code of a selected item can be activated or deactivated in the TSIs TSI.

Employment types

An employment type indicates the contractual work relation a person has with your company, such as part-time, full-time, and external. The **Employment types** selection step enables you to select the defined existing employment types within your organization.



Employment types can be added and maintained in Supporting data .

Through the employment type pick list you can specify the employment type of each employee. The **Employment types** selection step can also be used to retrieve personnel of a particular employment type by first selecting an employment type on the **Components** selection level and then descending to the **Personnel** selection level.

Positions

The **Positions** selection step enables you to select the defined existing positions in your organization.



Positions can be added and maintained in Supporting data .

By first selecting a position on the **Components** selection level and then descending to the **Personnel** selection level, the **Positions** selection step can also be used to retrieve personnel who hold a particular position within your organization.

Each position in Essentials Edition is linked to a number of square meters/feet of floor area. This enables you to classify personnel according to space requirements. In the Spaces & Workspaces TSI these space requirements are used to evaluate the total floor area required by all the people that are linked to a particular space.

Person types

A person type classifies how a person interacts with your organization's work processes. Examples of person types are internal coordinator, external contact person, supervisor, subcontractor, etc.



Person types can be added and maintained in Supporting data .

The **Person types** selection step enables you to select the defined existing person types within your organization. By selecting a person type on the **Person types** selection step and then selecting a person on the **Personnel** selection level will link a person to the selected person type.

You can also view personnel of a particular person type by selecting a person type on the **Components** selection level and then descending to the **Personnel** selection level. The link between personnel and person types enables you to retrieve filtered pick lists in other TSIs, which will only contain personnel of a particular person type.

Skills

The skills available on this step can be linked to person(s) on the **Personnel** selection level. One or more skills can be linked to a person.



Skills can be added and maintained in Supporting data .

Work addresses

The **Work addresses** selection step displays the complete address list of business contacts for your organization. This address list is usually maintained in the Addresses TSI, although it can also be modified in the Personnel TSI.

Selecting an address in the **Work addresses** list and then descending to the **Personnel** selection level will display the contact persons for the selected address.

You can also link a work address to a person by selecting a work address on the **Work addresses** selection step and then descending to the **Personnel** selection level, where you can then add a person. This person will now be a contact person for the selected work address.

Personnel

Personnel data can be edited at the **Personnel** selection level. Depending on the selections you have made at previous selection levels, a specific set of people with their data is available at this selection level. Here you can modify the personnel data or link a new person to the selected criteria.

Archiving personnel

You can transfer personnel data to be retained to your digital personnel archive via the **Transfer to archive** option in the action panel. Once persons and their data have been transferred to the archive they can be viewed, but can no longer be modified. In order to modify any archived data, you must first retrieve the relevant person from the archive.

The ability to transfer a person to the archive depends on your settings and authorizations. It is not possible to archive personnel:

- If a person is present in an active order (of any order type) as either the internal tradesman or the contact person of the external tradesman address.
- If any related Planon account is present.

You can dearchive personnel from the archive using the **Retrieve from archive** option in the action menu.



It is not possible to dearchive a person if the linked work address is archived.

Working with Personnel

Activating a person type

Procedure

1. Go to Supporting data > **Person types**.
2. Click the **Type [#]** you would like to activate and enter a value in the **Type** field.
3. In the **Is active** field click **Yes**.
4. Click **Save**.
5. The person type is now activated. It is now displayed at the **Personnel** selection level. You can now use the newly added person type and link it to a particular person.



You can define up to 10 person types.

Linking skills to persons

Skills created in Supporting data can be linked to personnel / employees.

Procedure

1. Go to **Personnel** and select a person to whom you want to link skills.
2. On the **Links** action panel, click **Link skills**.
3. In the **Link skills** dialog box, select the skills in the **Available** list and move them to the **In use** list.
4. Click **OK**.

The skill details linked to the selected person are displayed in the data section.

Linking personal certificates to a person

Use the following procedure to add personal certificates to a person.

1. Go to **Details** > **Personal certificates**.
2. On the action panel, click **Add**.
3. In the data section, complete the relevant fields. For a description of these fields, refer to [Personal certificate fields](#).
4. Click **Save**.

You have now added a certificate to a person.



In **Resource Planner**, you can filter personnel by the certificate types that are filled in here.

CAD Integrator in Personnel

CAD Integrator is a tool that you can use to create graphical representations of spatial information that is registered in Essentials Edition . In Personnel you can start CAD Integrator by clicking the relevant toolbar button, to display a selected person graphically in a converted AutoCAD drawing.

In Personnel , CAD Integrator is available at the **Personnel** selection level.



For more information on using CAD Integrator in Personnel , refer to *CAD Integrator* .

Personnel – Field Descriptions

Personnel fields

Field	Description
Code	A person's unique code. It is either automatically generated or manually entered.
Person type	Link a relevant person type to a person. You can select one or multiple person types from a pick list.
Professional title	Specify how this person must be addressed: with Mr, Mrs or Ms.
Initials	Enter the person's initials.
First name	Enter the person's first name.
Prefix	If relevant, enter the person's prefix.
Surname	Enter the person's surname.
Alias	If applicable, enter the person's abbreviated name or alias, which is used for identification in a corporate application, for example.
Gender	Select the person's gender: Male , Female or X (gender-neutral).
User defined status	Displays the current status of this person.
Main enterprise	Select the main company / holding for which this person is working. A dialog box referring to the Addresses TSI is available in this field.
Department	From the dialog box available in this field, select the department for which the person is working.
Position	Enter the position the person is holding.
Property	Select the property in which the person is working. A dialog box referring to the Spaces & Workspaces TSI is available in this field.
Space	Select the space in which the person is working. A dialog box referring to the Spaces & Workspaces TSI is available in this field.
Work address	Select the address or service team to which this person is linked. A dialog box referring to the Addresses TSI is available in this field.
Phone number	Enter the person's land line telephone number.
Email	Enter the person's email address.
Mobile phone number	Enter the persons mobile phone number.
Transferred to archive	Displays whether this person's record was transferred to the archive.

Field	Description
Cost center	Select the cost centre to which this person is linked. (The data in the dialog box that is available in this field is maintained in Supporting data).
Photo	Upload a picture of the person in this field.
Employment type	Select the person's employment type from the dialog box in this field.

Personal certificate fields

Field	Description
Code	Enter a valid code for the personal certificate.
Name	Provide a relevant name to understand the personal certificate.
Certificate type	Select a certificate type from the list. This list is defined in the Supporting data . For more information, see Supporting data > Certificate types .
Person	Select a person from the list with the relevant certification.
Valid from	Select a start date for the validity of the certificate.
Valid up to and including	Select an end date for the validity of the certificate.
Secure document	Upload a relevant certificate copy.

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