



# Personnel Manager

## System Set-up Manual



### Prepared by AgathonHR

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## 1. Company Settings

### 1.1 Company Information

The Company Name and Details you enter at this point, are the Details that are available to place onto your Letters and Reports and which are used in calculations elsewhere in the system.

**It is therefore important that these are set up accurately, preferably before you begin entering Employee records.**

### 1.2 Entering Company Name and Address

1. Choose COMPANY SETTINGS from the COMPANY Drop down menu
2. Enter name and address etc
3. Press OK
4. Press OK when completed.

*TIP When entering address, use tab key on keyboard to move to the next address line. If you press Enter it will close the COMPANY INFORMATION SCREEN*

### 1.3 Company Logo.

The company logo can be loaded into Personnel Manager for use on reports etc.

1. Choose COMPANY LOGO from the COMPANY Drop down menu
2. Click on the LOAD button
3. Locate the BITMAP image you wish to use as your logo
4. Press OK
5. Press OK

### 1.4 Company pay periods

The Company pay periods are used elsewhere in Personnel Manager and it is important to set them up correctly.

- The first three fields on this screen that define the number of pay periods for certain employees are used to calculate the annual pay of weekly paid employees.
- E.g. If a weekly paid employee earns £100 per week, to calculate his annual pay, that figure is multiplied by 52. However what the user has to be aware of is some years an employee will receive 53 pay packets. Payroll staff will know which years are 53-week years and can advise you if you are unsure. **Whenever a 53-week year occurs you must change this screen to reflect the extra pay period(s) otherwise the Annual pay for the employee will be incorrect.**
- The working days per year field is set to 261 as this is the number of days an employee would work if he did a 5 day week. This will change to 260 if not a leap year.
- The working hours per week field is simply a default and can be changed individually for employees. So if you have staff who work many different hours per week, we advise that you enter the most common number of hours worked in this field.
- The working hours per day field is important, as this is the number of hours the system will apply to every day someone is absent. E.g. If this field were set to 7 hours per day and an employee were absent for 4 days, the system would calculate that the absence was for 28 hours. The number of hours lost is how it will assign a cost to the absence. Absence cost = Hours Lost X Rate per Hour. However the hours lost can be manually amended on the absence screen.

### 1.5 Currency Exchange rates

This is used to set up exchange rates if you intend to pay employees in other currencies.

*Note: On each Employees 'Pay Screen' you will always see their pay in Local Currency, the currency in which the pay is entered and Euro pay equivalent. The settings here are simply used to set the relevant exchange rates for the present date*

## 1.6 Statutory holidays

All statutory holidays defined by your company can be entered here. These will be displayed in the absence calendar.

1. Select STATUTORY HOLIDAYS from the COMPANY drop down menu
2. Select the drop down calendar under HOLIDAY DATE
3. Click on the month name or on the right arrow to find "DECEMBER" and Click on '25'
4. Click on the RECURRING box so that a tick appears
5. Enter "1" in the DURATION box
6. Finally enter the DESCRIPTION 'Christmas day'
7. Click the TICK button to accept these changes.

The + - ( X buttons can be used to insert , delete and cancel changes

**It is essential that the Statutory Holidays are entered correctly in order for Personnel Manager to calculate absence allowances accurately.**

*Note: Xmas Day, Boxing Day and New Years Day only need to be entered once, ensuring that the Recurring box is ticked. The other 5 Bank Holidays (Easter Monday for example) will need to be entered each year, ensuring that the Recurring box is NOT ticked.*

## 1.7 Absence Allowances

Absence allowances such as holiday entitlements can be set up in Personnel Manager for calculating how many days each employee is entitled to in a 1-year period.

When creating Absence Allowances, Personnel Manager automatically Pro Rata's new starter allowances depending on the date of join, based upon the full allowance. For example, if the company's holiday year begins on 01/01/2000, the standard annual allowance is 24 days and the new starter joins in June, then the system will give them a pro rated allowance of 12 days.

This also applies when you enter in a Date of Leaving, the system will automatically pro rata the allowance left up until the employee is due to leave so they cannot take more than their allowance before they leave

### **Setting Company Absence Allowances**

A typical allowance is a Holiday Entitlement where each employee is permitted say 25 days holiday per year, this does not increase each year employee's stay with the company.

A slightly more complicated allowance is again a Holiday entitlement where employees receive 22 days up to 2 years service. This then increases every year they stay with the company by 1 day per year.

### **Create a new allowance**

1. Select ABSENCE ALLOWANCES from the COMPANY Menu.
2. Select Create a new allowance and click NEXT
3. Type in a meaningful DESCRIPTION for this allowance.
4. Select the CATEGORY for this allowance (sickness or Holiday for example)
5. Select the UNITS (Hours or Days). Then Click NEXT.
6. Set the ALLOWANCE BASIS, either Length of Service, Age or None. Click NEXT
7. Set the ALLOWANCE METHOD, either Annual Amount or Accrued. Click NEXT

8. Set whether or not to CARRY OVER holidays. Click NEXT
9. Click FINISH.

*Note: If you specified that the allowance was calculated using an accrual rate, you will need to define the accrual rate using the screen displayed. For further information on defining accrual rates, please consult your Personnel Manager Manual.*

*You will need to repeat the above process for each allowance in your company whether this is for Holiday, Sickness etc.*

#### **Changing Existing allowance.**

Follow process as above, but select Change Existing allowance and choose which allowance you wish to edit.

#### **Delete Allowance**

- Select ABSENCE ALLOWANCES from the COMPANY Menu
- Select DELETE ALLOWANCE
- Choose allowance you wish to delete and click NEXT
- Choose whether or not you wish to delete the Personal Allowances History for this allowance and then Click FINISH.
- *Please note this will delete all occurrences of this allowance within the database.*

#### **Assigning Allowances to Employees**

- Select ABSENCE ALLOWANCES from the COMPANY Menu
- Select ASSIGN ALLOWANCE and choose the allowance you wish to assign. Click NEXT
- Select who you wish to assign the allowance to - Group, Filter or All Employees. Click NEXT
- Select the date on which the allowances will start for this group - Specify the date, Start on Anniversary of date of join, or start on anniversary of end of probation. Click NEXT.
- Click FINISH. (This may take a while if there are a lot of records to update).
- *Please note that assigning allowances in this way will not overwrite any existing allowances and that allowances cannot be duplicated for the same category in each year.*

### **1.8 End Of Year Leave Maintenance**

The Year End Process can be run at any time as it only does something to the records where the start date of the allowance has passed.

*Note: This function will zero all leave taken figures and carry forward any outstanding leave on all employees records and therefore this process should only be carried out by the System Administrator. We also strongly advise that you take a backup of your data prior to running this procedure.*

### **1.9 Company Vehicles**

All data related to owned or leased vehicles can be stored. Details of all vehicles used by the company must be entered into the database to enable vehicle usage and reports to be obtained.

1. Select VEHICLES from the COMPANY drop down menu
2. Select 'VEHICLE DETAILS' tab
3. Select ADD button from the Toolbar
4. Enter in the Vehicle details

Once you have entered in all your company vehicles, these can be assigned to employees using the Vehicle usage screen on the Shortcut bar.

*If you manage a large fleet of vehicles, you may find it beneficial to purchase Fleet Manager from Vizual Business Tools.*

## 2. System Settings

### 2.1 Setting Up Diary Reminder Triggers

Diary triggers are used on fields where you will enter a future date, such as a Disciplinary Review Date. Once this field is set up as a Diary Reminder Trigger, every time you enter a date in this field, the system will ask you if you would like to be reminded about this event.

*NOTE: This will not work on past dates, for example, the Date of Birth field as this is a past date and never changes.*

1. Select Diary Event Triggers from the Options drop down menu
2. Select the SCREEN on which you want to create a diary reminder trigger from the Screen Name List
3. Click the ADD button
4. Select the FIELD that you want to trigger a diary reminder when the information in it changes
5. Enter a DESCRIPTION of the reminder
6. Specify the number of days, hours, or minutes beforehand that you want to be reminded. Select Days, Hours, or Minutes from the drop-down list
7. Repeat this process for each field you would like to set up as a Diary Reminder Trigger

### 2.2 Setting Up Career Event Triggers

Personnel Manager can prompt you to create a Career Event when certain pieces of employee data change, such as department, location or status. When a Career Event is created, it is added to the employee's Career History.

1. Select CAREER EVENT TRIGGERS from the OPTIONS drop down menu.
2. Select the SCREEN to be used to create a career event trigger.
3. Click the ADD button.
4. Select the FIELD that you want to trigger a career event when the information in it changes.
5. Enter the text that you want to appear when the career event is triggered.
6. Click OK.
7. Repeat this process for each field you wish to set up as a Career Event Trigger.

Typically you will only want to set these up for the fields on the Contacts tab on the Employee Details screen

### 3. User Preferences

There are four Tabs available, use these to define the settings within the system:

#### 3.1 The General Tab:

This is where users can set up the system to how they want to use it. By default these are already set up in the preferred way and it is therefore recommended that you do not change these settings

#### 3.2 The Add On's Tab:

To specify which word processor and spreadsheet application you want to use with Personnel Manager.

1. Select PREFERENCES from the OPTIONS drop down menu.
2. On the Options screen, click the ADD ON tab.
3. Specify which word processor and spreadsheet you want to use by clicking the appropriate option (it is recommended that you use MS Word as the word processor as this will allow you to get the most from your letters.

#### 3.3 The Automatic Backup Tab

**'Automatically backup my databases'** If this box is checked, then the system will take an automatic backup of your data every 'n' number of times you use the system, 'n' being the number you specify in the second box on the screen. **This Option is only available on single user systems.**

1. Select Preferences from the Options menu.
2. On the Options screen, click the Automatic Backup tab.
3. To turn on the automatic backup feature, check the Automatically Back Up My Databases box. By default, the backup is switched on.
4. Specify how often you would like to be prompted to make a backup. You can specify any number between 1 and 20.

#### 3.4 The Absence Tab:

Use the absence tab to set up how Personnel Manager, handles weekends and Statutory Holidays when calculating the Absence allowances.

1. Select PREFERENCES from the OPTIONS drop down menu.
2. On the Options screen, click the ABSENCE tab.
3. In the Absence Settings section, take one of the following actions.
  - *To include weekends in all holiday and absence calculations, check the Include Weekends in Absence Calculations checkbox. To omit weekends from time lost calculations, deselect this checkbox.*
  - *To include company holidays in all holiday and absence calculations, check the Include Weekends in Absence Calculations checkbox. To omit company holidays from time lost calculations, deselect this checkbox.*

#### 3.5 The Automatic Recalculation Tab

The Automatic Recalculation tab is where we can tell Personnel Manager to recalculate the data in the database the first time of each day when Personnel Manager is opened.

Simply Click the Automatic Recalculation of Databases so that a tick appears.

If you don't want the databases automatically recalculated in this way simply remove the tick.

#### 3.6 The Allowance Options Tab

The Allowance Options Tab is where we can set up various settings which effect the way employees annual holiday allowances are calculated.

Once you have set these up it is advisable not to change them again.

Click OK when you have made your changes to the User Preferences

## Appendix 1 - Glossary of Terms

DATABASE	Is the equivalent to a filing cabinet, which stores your employee information. You may have more than one database for example, one to store leavers and one to store Current Staff.
RECORD	A record is similar to a file you may keep within a filing cabinet, where you have one file per employee. This is the same with Personnel Manager where, each employee has a record for storing his or her details, (for example, Employee Details Screen). Each employee's record is made up of sub-records such as Training History.
SCREEN	Is where we can clearly view the details of an employee's record. This is called the Employee Details screen and only records the current information about each employee.
SUB-SCREEN	In addition to the Employee Details screen, we have Sub-screens, where we can record other information such as Training History or Pay History. These are sometimes referred to as Sub-Records or History Screens.
TABLE	Is where the data is actually stored within the database. Each table has a screen in order to view the details more clearly. You may find that there are extra fields on a table than appears on the screen. These are useful in Filters, Queries and Reports.
FIELD	Where we can add specific data about an employee. For example, the Department field is where we enter which department the employee works within. There are several types of fields, Text fields, Pick List fields etc.
DATA	Data is another word for Information or Details.
FIXED PICK LIST	Is a list of data relevant to a specific field where you cannot add extra items. For example, the Gender Field.
PICK LIST	Is a list of data relevant to a specific field where you can add your own items. For example, Job Title Field. NOTE: These can be set up as Fixed Pick Lists using the Screen designer.
FILTER	To enable you to work with selections of employees when giving pay rises, reviewing absence, or sending letters for example.
QUERY	A tool which enables you to export a selection of employee data into MS Excel for example.
ARCHIVE	When an employee leaves, we can move their record to the another Database which is set up to specifically store leavers. This is called the Archive Database.
USERNAME	The unique name assigned to the person using Personnel Manager
WIZARD	A tool which guides you step by step guide through a process of screens
VBT	Vizual Business Tools



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## Appendix 2 - Contacts

### asap management ltd

If you have any queries relating to Personnel Manager (or other products in the Vizual range) or if you require additional training or consultancy, please contact asap management by:

**Phone: 01242 663974**

**Email: [info@asapmanagement.co.uk](mailto:info@asapmanagement.co.uk)**

### Vizual Support

If you purchased the Annual Support with your copy of Personnel Manager you will have access to the Vizual Business Tools Support Desk, which is available Monday to Friday 0900 – 1700 on the following number:

**0870 8709446**

You will be asked to provide your company name, the product and version and a brief description of the problem.