

CUSTOMER GUIDE: Personnel Records

Overview

FLEETMATE features a Personnel module that will enable you to enter employee information, and to track a variety of information, including License Renewals, Training and Certifications, Reminders and Driving History information.

Records entered into the Personnel module are also used to drive the built-in Security features in FLEETMATE. If you wish to use the security features in FLEETMATE, you need to define a personnel record for each user.

i Use of the Personnel Module is optional, but should be considered. Some areas of FLEETMATE utilize this data to make the system more convenient to use.

The screenshot shows the 'FLEETMATE™ Personnel Module - 13 Records Listed' window. At the top, there is a search bar for 'Employee No'. Below it is a table with columns: Emp ID, SSN, Last Name, First Name, Home Phone, Work Phone, and Job Title. The table lists several records, with 'E12345' selected. Below the table are tabs for 'General', 'Employment', 'License/Certification', 'Driving History', 'Comments', and 'Reminders'. The 'General' tab is active, showing a form for employee details: Emp ID (E12345), Last (Smith), First (Edward), Middle (G), Address (123 Main Street), City (Baltimore), State (MD), Zip (22222), E-Mail (egsmith@anydomain.com), Web Site, Work Phone (111-222-3333), Home (444-555-6666), Cell (777-888-9999), Pager (NA), and two Emergency Contact fields. A 'No Photo' placeholder is on the right. At the bottom, it shows 'Created: 09/16/2013 12:04:38 PM by: Unknown' and 'Last Edit: 04/04/2014 9:34:09 PM by: steve'. Buttons for 'Save Current Record' and 'Close' are at the bottom right.

Emp ID	SSN	Last Name	First Name	Home Phone	Work Phone	Job Title
E00004	444-44-4444	Monroe	James	444-444-4444	444-444-4444	Driver
E12345	111-22-3333	Smith	Edward	444-555-6666	111-222-3333	Fleet Technician
E00009	999-99-9999	Tyler	John	999-999-9999	999-999-9999	Executive - Presi
E00007	777-77-7777	Van Buren	Martin	777-777-7777	777-777-7777	Fleet Technician
E00000	000-00-0000	Washington	George	000-000-0000	000-000-0000	Driver

Personnel Window – General Tab

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Personnel Information Topics

General

This tab features fields for basic employee information including contact and emergency contact information.

Employment

Use the Employment tab to record data relevant to employment status. You can assign an employee to a Department, Work Location, record the employee's Job Title and several other attributes. The **Department** setting is important if you use the Security feature in FLEETMATE, and you want the vehicles listed to be limited to the vehicles in the employee's Department.

Emp ID	SSN	Last Name	First Name	Home Phone	Work Phone	Job Title
E00004	444-44-4444	Monroe	James	444-444-4444	444-444-4444	Driver
E12345	111-22-3333	Smith	Edward	444-555-6666	111-222-3333	Fleet Technician
E00009	999-99-9999	Tyler	John	999-999-9999	999-999-9999	Executive - Presi
E00007	777-77-7777	Van Buren	Martin	777-777-7777	777-777-7777	Fleet Technician
E00000	000-00-0000	Washington	George	000-000-0000	000-000-0000	Driver

General | **Employment** | License/Certification | Driving History | Comments | Reminders

DOB: 05/01/1980 | SSN: 111-22-3333 | Job Title: Fleet Technician | Grade: 10 | Default Rate per Unit: 37.25

Dept: Customer Service | Location: Headquarters - Baltimore

Hire Date: 09/16/2013 | Release Date: | Inactive Employee

Comments: | Comments:

Save Current Record | Close

Personnel Window – Employment Tab

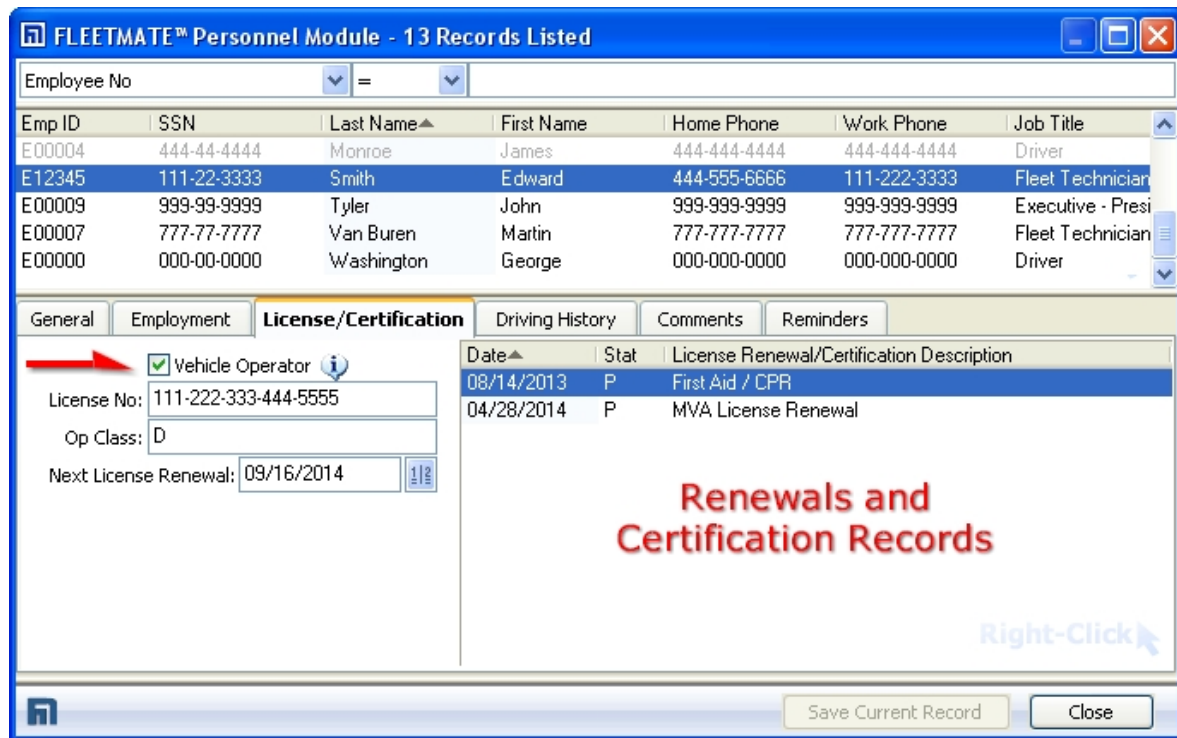
If the employee is a fleet technician, be sure to set the employee's Job Title to "**Fleet Technician**". In addition, if the employee is a Fleet Technician, be sure to set the Default Rate per Unit, so that the technician's default bill rate per unit of labor automatically comes over to labor lines on a work order.

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Personnel Information Topics

License/Certification

This tab determines if an employee is a vehicle operator, and accommodates driver's license information as well as training and certification records.



Personnel Window – License/Certification Tab

Be sure to check the **Vehicle Operator** checkbox if the employee is a driver or equipment operator.

To add License / Certification records, right-click in the listbox and choose "Add New..." from the popup context menu.

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Personnel Information Topics

Driving History

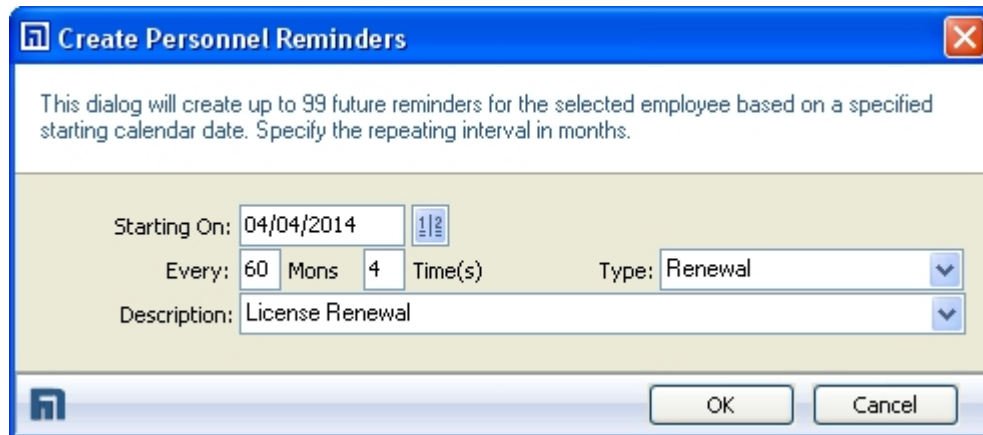
Use the Driving History tab to record events, which occur in the course of operating fleet vehicles. To add a Driving History record, right-click in the listbox and choose "Add New..." from the popup context menu.

Comments

The Comments tab is a free-form text box that you can use to make any miscellaneous notes or observations regarding an employee. There are also four custom fields that can be used to note miscellaneous information for future reference.

Reminders

Use this tab to setup future reminders for things such as license renewals, and re-certifications and training classes. To add Reminders, right-click in the listbox and choose "Create Scheduled Reminders..." from the popup context menu.



Reminders Dialog

The dialog pictured above will create four (4) License Renewal reminders that will come due every five (5) years.

Reminders that come due will appear on the Personnel tab on the Reminders window in FLEETMATE. More information on creating Personnel reminders can be found later in this document.

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Adding a Personnel Record



To add a new personnel record, click the Personnel toolbar button or use the Company Data | Personnel... menu option.

Once the Personnel window appears, your current personnel records will be listed in the upper pane of the window. Right-click in the personnel list area and choose Add New Personnel Record from the popup menu. A new personnel record will be added to your list, and will have an Emp ID value of “**_NEW**”.

The Emp ID is normally a value that coincides with payroll IDs at your business. The Emp ID and SSN fields must contain values. Each Emp ID value must be *unique* among all personnel records. If you wish not to enter the employee's SSN due to confidentiality concerns, enter “UNK” or “NA” rather than the actual SSN.

The License/Certification and Driving History tabs enable you to maintain logs of information for reference purposes. Use your right mouse button to Add and Delete records. Double-click on a record to access it for editing.

Check the Vehicle Operator checkbox for employees that operate fleet vehicles/assets. This will enable you to choose from a list of these employees when defining a vehicle record.

Set the Job Title to “**Fleet Technician**” for employees that will service fleet vehicles. This will cause these employees to be made available for selection when entering Labor lines on a Work Order.

If you wish to utilize the built-in E-Mail features in FLEETMATE, be certain to enter an email address on the General tab for each personnel record.

Use the Reminders tab to define any future reminders for the employee for items such as License Renewals.

Complete each personnel record and click Save Current Record to store the information in your database.

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Editing a Personnel Record



To edit a personnel record, click the Personnel toolbar button or use the Company Data | Personnel... menu option.

Once the Personnel window appears, your current personnel records will be listed in the upper pane of the window. Click in the personnel list area to choose the personnel record you need to edit.

The employee's data will be stored under the six (6) topic tabs in the lower-portion of the window. Visit the various tabs to make your changes.

Once your changes are complete, click the Save Current Record button to save your changes.

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Defining Personnel Reminders

The Reminders tab on the Personnel window is designed to enable you to setup future reminders for items such as special certifications, license renewals, and training or refresher courses.

To define reminders for an employee, select the personnel record, and then click the Reminders tab.

Right-click in the reminders list area and choose the Create Scheduled Reminders option. This will open the Create Personnel Reminders window.

The Starting On field should be set to the calendar date on which the first reminder will be due. Use the calendar button to select your date.

Set the monthly interval and the number of future reminders to create. As an example, if you want to be reminded of bi-annual training for the next 10 years, set the interval to 24 months, 5 times. A reminder will then come due every two (2) years for the next 10 years.

Use the Type field to define a category for the reminders. Examples might include "Training", "Refresher", and "Renewal."

Use the Description field to describe the nature of the reminders. Sample descriptions could be "License Renewal", "HAZMAT Training" or "First Aid."

Click the OK button to create the reminders, or click Cancel to abandon the function.



Important Information:

If the reminder Description contains the phrase "License Renewal", FLEETMATE will automatically update the Next License Renewal field under the License/Certification tab when you ultimately complete the reminder. This date will be based on the next pending License Renewal reminder. This will eliminate the extra step otherwise required to manually adjust this field value.