

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 displays the FLEETMATE Personnel Module interface. The main window shows a list of personnel records with columns for Employee No, Last Name, First Name, Home Phone, Work Phone, Cell Phone, Job Title, Department, and Work Location. A record for Thomas Jefferson is selected. An 'Edit Personnel Record' dialog box is open, showing the 'General' tab with fields for Emp ID, Last, First, Middle, Address, City, State, Postal/Zip Code, E-Mail, and Web Site. The dialog also includes fields for Work Phone, Home, Cell, and Pager, along with Emergency Contact Name and Phone fields. The background shows a 'Fleet Assets' table and a 'Work Order' table.

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.

The screenshot shows the 'Edit Personnel Record' window with the 'Employment' tab selected. The fields are as follows:

DOB:	1/1/1962	SSN:	222-22-2222	Job Title:	Driver
Dept:	Field Service	Grade:	40	Labor Cost/Unit:	0.00
Location:	Northern - Hunt Valley	<input checked="" type="checkbox"/> Fleet Technician	Billing Rate/Unit:	0.00	<input type="checkbox"/> Edit Billing Rate/Unit on a Labor Line
Hire Date:	1/1/1992	Release Date:		<input type="checkbox"/> Inactive Employee	

Personnel Window – Employment Tab

If the employee is a fleet technician, be sure to check the Fleet Technician box. In addition, if the employee is a Fleet Technician, be sure to set the Billing 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. Setting the Cost per Unit is only relevant if you want to track net revenue (Billing Rate/Unit – Labor Cost/Unit).

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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.

Edit Personnel Record

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

Vehicle Operator

License No: 222-222-222-222-222

Op Class: D

Next License Renewal: 3/29/2020

Date ▲	Stat	License Renewal/Certification Description
3/1/2004	Pass	Defensive Driving Techniques
3/4/2004	Pass	Time Management
4/3/2019	Pass	CDL Renewal
5/4/2005	Pass	Conflict Management

Right-Click

OK Cancel

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.

Create Personnel Reminders

This dialog will create up to 99 future reminders for the selected employee based on a specified starting calendar date. Specify the repeating interval in months.

Starting On: 1/9/2020

Every: 24 Mons 5 Time(s) Type: Training

Description: CPR/First Aid Refresher

OK Cancel

Personnel Reminders Dialog

The dialog pictured above will create five (5) future "CPR/First Aid Refresher" reminders that will come due every two (2) 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.