

Personalverwaltung

In general the personal administration allows the assignment of transponders to employees. The further functions may differ according to booked options. This affects the default work- and pause time, the assignment to Reiner SCT and the driver data for further digitacho specific reports. The number of visible options is also dependent on the rights of the currently logged on user.

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Document terms

By using document terms you can get a quick overview about upcoming dates and expired documents. We distinguish between two types: warnings and reminders.

Warnings answer the question "Which documents will expire soon or have been already expired?". They refer to a static date, which was set as 'valid to' in a document. You will need to set an advance warning interval. On this base the values for expired, soon expiring and everything okay will be calculated.

Reminders look for recurring events, like a birthday or a 10 year company anniversary. Here you need to set in which interval this date will be renewed. For a birthday this would be for example yearly, a company anniversary might be interesting only every 5 or 10 years. Here you will have to set an advance warning interval as well, to set how much earlier you want to be informed about this upcoming event. You can also set reminders for documents, but this is only possible for documents which have 'valid from' date.

If a term is restricted to certain drivers or personal groups, this is shown by an icon . If a warning/reminder is sent via mail or portal message, this will also be shown by an icon . The color of the tile symbolizes if there is an advance warning, something expired or if there is a reminder date today.

By clicking on a tile the table with the underlying info will open. You can access the personal data per driver. Furthermore there is an option to edit or delete a term.

Create or edit warnings & reminders

To create a new term, click on 'add new warning/filter'. A new dialog will open. To edit an existing term, click on the corresponding tile first. On the top right of the table which will open is an action menu. By using this you can edit or delete the term.

Step 1: warning type

In the first step you need to set a description for your term. Afterwards you need to decide on a warning type. A *warning with expire date* describes a term on a specific date, which expires one time only. An *entry with recurring date* is a reminder which occurs in constant distances of time based on an initial date.

Step 2: document / event

In next step you decide which date is relevant for your term. You can check for all available document types. Reminders can also be set on birthdays or dates of employment.

Please notice that you can only choose from documents which have the needed date field. *Warnings with expire date* need at least a 'valid to' field, while *entries with recurring date* need at least a 'valid from' field.

Step 3: persons

Afterwards you need to decide for which persons and person groups your term should be valid. By default 'all persons' are chosen. If you uncheck the checkbox, the mask for person selection will open. You will only see people for who you have the needed personnel rights. You can choose either persons and/or person groups. If you choose a person group which contains persons you are not allowed to see, you will not be informed about warnings on these people. But in the following step you are able to set the recipient of the warning on another portal user. These users will get warnings on all people who they have a right on.

If a person does not have the date you decided on earlier, the person will be marked with *. Of course there will be no warning without a date. But if you add this date later on, the term will be active for this person as well.

Step 4: notification

At last you need to decide who and when will be informed about a warning. For *entries with recurring date* you need to set a follow-up interval, from which your date will be repeated. Afterwards you need to set the advance warning interval. This is necessary for both warning types. This intervals is relevant for when will be the first warning time.

Finally you need to decide who will be informed in case of warning. There are 3 types of notifications to choose from: portal, e-mail and personal. Via portal you can choose a arbitrary portal user as recipient. This person will be informed via portal message. Warnings will only include people to whom the portal user has the needed personnel rights. Via e-mail you can set an e-mail address. The data base consists of people to whom you as a creator have the needed personnel rights. The type personal informs the personnel itself about their own warning. To do so you need to set an e-mail address for them in personnel management. You might get an info if this is not the case for one of the selected persons.






For all types you are able to set if you only want to be warned once or at an interval of a specific time. If you choose daily, weekly or monthly, you will be informed regularly until the trigger is eliminated. For reminders this happens when the date is exceeded. A warning will only stop, if the corresponding document was renewed and therefore the new date is outside of the advance warning time.


You can also set multiple portal users and/or e-mail addresses.

Personal administration

Overview

The following options may be available on top of the page:

	<i>Refresh</i>	Reloads the whole list
	<i>Add person</i>	Switches to input dialog to add a new employee with its data
	<i>Set worktime for selected</i>	Opens the dialog to change the work and/or pause time of all selected persons
	<i>Delete selected persons</i>	Deletes the previously selected persons with all assigned following cards
	<i>Transpondersearch</i>	Finds all new transponders registered within last 7 days

	group assignment for selected persons	Opens a dialog to assign one or more groups to previously selected persons
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The basic table with personal data consists of following columns: name, personal key, activation date (of personal key) and action.

Add person

The available input fields of this menu also differ with booked options. With basic functionality it is possible to enter a person name and an according transponder key. Klicking *save personal data* will save the inputs and return to the overview list.

The data are structured into multiple areas depending on currently booked options.

Common data

You can define the name and the personal key here. Driver cards have an expiration date, so it is also possible to set the expiration date here. This date does not affect any report!

If any personal group defined before, the person can be assigned to one or multiple personal groups.

Time management

With timerecordings activated, you can define the default work- and pause time for the person here. The behaviour of the time specific reports and the work- and pause time calculation is changeable via [Administration] -> [Timerecording]

Reiner SCT

Using the timecard connector will require this specific data set.

Driver data

The digitacho driver management requires some specific data. This data can be set here. The expiration dates here are only for own control too! Required inputs are birthdate, date since when the driver is an employee and at least one document number.

Driver rating

For driver behaviour report a minimum shift idle time has to be set. This is the idle time where 2 different work states will be divided into 2 working days. This assignment only affects the report behaviour because there the digitacho driver regulations must not be stringent.

Work time rule

The work time rule has an impact on the calculation of the times in the modules Digitacho and time recording. The adjustment primarily affects the calculation of breaks and standby times.

Rule	ArbZG (Arbeitszeitgesetz)	ArbZG incl. §21a	ArbZG incl. §21a + 2002 /15/EG	ArbZG, but standby times are no work time
Breaks of less than 15 minutes are working time	✓		✓	✓
Standby times count as working time	✓			
Standby times count as breaks		✓		
Standby times of 15 minutes or more are rest breaks		✓	✓*	✓

* Standby times that come from the Digitacho are only counted as rest breaks if they have been booked as a co-driver (slot 2).

Note: The threshold value from when a break is considered a rest break in the time recording depends on the setting in the working time profile. The standard value is 15 minutes.

Edit personal data

The mask is similar to the add mask with prefilled input fields. But there are some special rules for editing some values.

Changing the name will delete the old person and create a new entry with the latest personal key as only key. The only exception is the first name assignment for "new transponder" entries after the transponder search.

A transponder key also can not be changed. Entering a new transponder key will result in using this key as following key. The old key will be still assigned to the person.

This rules ensure the correct assignment for reports!

Delete selected persons

Previously marked persons can be deleted here. Before the persons will be deleted there will be opened a dialog to ask if you really want to delete the persons. After a person was deleted the transponder key can be assigned to another person. But the transponder will not be shown as new transponder using the transponder search! If the person has one or more following keys this will be deleted too. Deleting a single following key will be possible using the action *edit following keys* for the person.

Transponder search






The transponder search checks all personal identifications at all vehicles within the last 7 days for an unknown transponder. To get the current progress there will be shown, which vehicle will be computed at the moment.

If no new transponders were found, an according message will be shown, otherwise you can see a table with all transponder keys found. For each of this transponder keys the vehicle and time of occurrence will be shown. The last column allows to directly assign this key to a person. This can be an existing person, then the key will be assigned as following key or a new name. If no name is assigned the transponder will be stored for *new transponder*. This assignment can be set later to the correct person.

Assignment to a personal group

If one or more person was selected before, a menu will be opened to assign one or multiple personal groups to this person selection. The assignment can be done only to existing groups. To create a new personal group please go to *personal groups* tab. The save mode allows to either add the selected groups and let probably other assignments for the persons untouched or to set the groups as the only assigned groups for the persons. This means all earlier other assignments for this persons will be deleted.

Actions

	show personal details	Opens the personal data for reading
	edit personal data	Opens the personal data for editing
	following keys	Opens the dialog to add or delete following keys
	transfer key	Opens the dialog to transfer a personal key to another person
	delete	Delete the current personal entry

Following keys

Each additional personal key, which is assigned next to an existing key of a person, is automatically a following key. If you want to add another key or delete an already existing key of the person, you can use the "following keys" action from the action menu.

Transfer key

If you want to transfer any existing personal key of a person to another or new person, you can use the "transfer key" action. During this dialog, you can also change the validity period of the personal key. A valid from date in the past is possible to perform a retroactive allocation here. If you transfer the last personal key of a person, this person is deleted.

Set worktime for selected

If time management module is available this option will be visible to modify the target work and default pause time for one or more persons. In this case the table itself shows the current settings in 2 additional columns (*target worktime* and *default pausetime*). Leaving one of the inputs blank (---) will result in no change of this setting for the persons. So it is possible to change the pause time for all but let different worktime assignments untouched. The assignment of this times will be also available on add or edit a single person.

Reiner SCT

To assign the persons to the external Reiner SCT solution the table will be extended with the columns *employee number* and *card number*. This allows the automatic assignment of bookings into Reiner SCT.





Digitacho driver

Using the digitacho interface will result in most comprehensive extension of data. The driver card will replace the function of the regular transponder key. So the driver will do the authentication just by inserting his driver card into the digitacho. Because this card also has a limited validity, it is possible to enter the date of expiration to have an overview, which driver does need a new document. To fill other driver specific documents such as *Attestation of activities* there are additionally columns to get the id and expiration for the identity card, driver licence and passport. Additionally there will be an extra input for driver birthdate and start date of undertaking on create or edit the driver data. Using the default view via [Administration] -> [Personal administration] this columns will not be visible but can be added in settings tab.

Personal groups

Overview

The following options may be available on top of the page:

	<i>reload tab</i>	Reloads the whole list
	<i>create personal group</i>	Switches to input dialog to add a new personal group
	<i>delete selected personal groups</i>	Deletes the previously selected personal groups
	<i>assign persons to selected personal groups</i>	Allows person assignment to the previously selected personal groups

The table contains besides the personal group names the list of assigned persons. The possible action is to edit the personal group data. The visible rows count per page is similar to personal table rows count.

Add personal group

On adding a personal group a unique name must be set. Optional one or multiple persons can be assigned directly to the group. The person assignment can be changed at any time.

Edit personal group

Via the action column the personal group data can be edited. This menu is similar to the creation menu and allows change of the group name and assigned persons.

Export

The personal data can be exported as PDF, XLS and CSV. Formats XLS and CSV export all for this company visible details. Format PDF exports details which are determined in portal and are shown on monitor.

Settings

The settings menu allows to change the default value for the visible rows and the order and visibility of table columns.

To change the column configuration just drag the column names in the desired order or move the columns between the pool and visible lists. Using the driver specific columns for authentication documents it is also possible to show only the expiration dates and let the exact numbers only appear as mouse over effect. So the table may stay a little bit more narrow to keep a better overview. To get the default configuration just click *reset to defaults*. To save the column configuration use *save configuration* instead.

