



Personnel Configuration Guide

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1.877.535.0222

www.jenzabar.net

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Personnel Configuration Guide

Identifying Accrual Benefits

The Personnel Configuration function defines the benefits that the Personnel system will accrue.

The system requires values here only if:

1. You have the Personnel module and **not** the Payroll module and will be doing accruals.
2. You have Personnel and Payroll modules but will be doing accruals **outside** of payroll the payroll run process.

The configuration codes you may need to define are:

- accrual vacation
- accrual sick
- accrual personal
- accrual other

You cannot define more than four accrual benefits that will accrue in the Personnel module. The accrual codes must already be entered on the Benefits Control table. You should type the same code here as used on the Benefits Control table. You should add the accrual codes for vacation, sick, and personal benefits. The Accrual Other Code is available if your organization has another accrual benefit, (e.g., educational hours) for which you will accrue time. Some examples of the codes are shown below.

Column	Code	Description
Accrual vacation	VAC	Vacation
Accrual sick	SICK	Sick
Accrual personal	PERSN	Personal leave
Accrual other	EDUC	Educational time

Use the Configure Personnel window to specify this information. For instructions on doing this, see How to Specify Accrual Benefits for the Personnel Module.

Defining Categories

The Category codes are assigned to Positions and employee's individual positions to provide another way to group or categorize the kind of job they hold. This can be used to add further detail to the Classifications, but can also be independent from them.

You assign a category to an Org. Position (in the Default Category). When an employee fills the position, the category automatically appears as the employee's category. This can be changed for the individual positions.

TIP: Define your organization's Category codes on the Table Detail (POS_CATEGORY code).

Following are Category Code examples:

Category	Description
SKL	Skilled
USK	Unskilled
CL1	Clerical 1
CL2	Clerical 2
PRO	Professional
NON	Non-professional
SUP	Supervisory
NSU	Non-supervisory

Your system administrator can show you how to enter them, or they can enter them for you.

This category is not the same as the **Accrual Years Category** in the Accrual Standards table, although you could define the two to be synonymous.

Defining Classifications

Before defining your organization's Positions, you first need to determine what classifications and what categories of employees you have.

Classifications (Classes) are broad areas into which you can divide employees. These can be used to group reports on employees, or for separating positions when generating timecards for a pay run in Payroll.

For example, you may have classes like the following.

Class	Description
AD	Administrative
FC	Faculty
SP	Support

You assign a class to an Org. position (in the Default Class column). Then when an employee fills the position, the Class automatically appears as the employee's **Class**. This can be changed for the individual positions.

TIP: These Classes need to be defined for your organization on the Table Detail (POS_CLASS code). Your system administrator can show you how to enter them, or enter them for you.

This Class is separate from **Accrual Class** in the Accrual Standards table, although you could define the two to be synonymous. Accrual benefits are based on the employee's Accrual Class code, not on this Class. code.

Defining Family Doctors

The Family Doctor master table contains all doctors whom employees at your organization use as a physician. You are able to assign the Doctor ID to an employee's master table. If the doctor has been entered on this table, their name appears on the record. It also prints as part of the Employee Profile report for the employee.

This information is entered on the Family Doctor window. For instructions on entering this information, see How to Enter Family Doctors.

Defining Organization Jobs and Positions

The Personnel module allows you to set up a type of hierarchy that defines jobs, positions, and the people that fill them at your organization.

At the highest level (and most broad) of these definitions are the **Organization Jobs**. We will refer to these as **Org. Jobs** or **Job Definitions**. These definitions simply define broad classifications of what people do at your organization (e.g., Org. Jobs).

While these are broad classifications, they must be at least as specific as Equal Employment Opportunity Commission (EEOC) codes. A job definition can only have one EEOC code attached to it. However, you can have multiple job definitions having the same EEOC code. Reports for Integrated Post-secondary Education Data System (IPEDS) and College & University Personnel Association (CUPA) rely on the EEOC codes that are attached to the job definitions. A Job code needs to be created for each CUPA Salary code and EEOC code that is required for reporting. These codes must be in place in order for those reports to be accurate.

Job definitions are also used to track applicants who are interested in positions at your organization (more information on these below). As employees enter and leave positions within your organization, the Positions Open column on the Definitions tab of the Organization Jobs window tracks the available openings for jobs. There are also several reports available that provide information about open positions, applicants, interviewees, and employees.

Jobs are defined on the Organization Jobs window. For instructions on how to do this, see [How to Define Jobs](#).

Job definitions may be broken down into more specific areas called **Organization Positions** (e.g., Org. Positions).

Finally, getting down to the most specific detail, you can define the individual positions that persons at your organization hold.

⇒ For example, if Professor Plum is a psychology professor, he fits in the **Job Definition of Professor**, and more specifically, the **Position of Psychology Professor**.

Positions are defined on the Organization Positions window. For instructions on how to do this, see [How to Define Positions](#).

At least one position must be defined on the person's record. These are called the **Individual Positions**. Define individual positions by assigning the employee to a position using the **Positions** tab on the Employee Information window or by using the Positions window. For instructions on doing this, see How to Enter an Employee's Position and Salary (e.g., Organization Jobs and Positions).

Defining Requirement and Category

The Personnel module allows you to set up specific requirements applicants would need to meet in order to be considered for positions within your organization. The requirements and categories that you define at the Organization Jobs level as well as the Organization Positions level are used in comparison with an applicant's qualifications to determine if the applicant is qualified for the position within your organization.

A requirement is a broad classification of a Job's or Position's necessary skill, experience, etc. A category allows the user to further define the requirement.

⇒ For example, the position of an Admissions Secretary has a Requirement of Job Skills. Categories that make up Job Skills include Typing, Shorthand, Dictation, etc.

Requirement	Category
Job Skills	Typing
	Shorthand
	Dictation

Defining Your Organization's Supervisors

The Supervisor Master table contains a list of supervisors at your organization and the number of employees supervised by each. When adding a position to an employee's record, you are able to specify their Supervisor's ID Number.

The Supervisor Master table is fairly simple. It contains the ID number of each person at your organization who is a supervisor, and the number of employees they supervise. You can manually update the number of employees supervised with the Supervisors window.

For instructions on how to define the supervisors, see [How to Define Your Organization's Supervisors](#).

Step-by-Step

How to Specify Accrual Benefits for the Personnel Module

1. **Choose PE, File, Admin, Task, Configuration, Personnel Configuration, Configure Personnel. The Configure Personnel window appears.**
2. **Type in your organization's codes for the specified benefits.**
3. **Save.**

For an overview of these codes, see [Identifying Accrual Benefits](#).

How to Define Categories (Org Jobs and Positions)

NOTE: You will define **Requirements** and **Categories** for both the **Organization Jobs** and **Organization Positions** through the **Maintain Table Values** windows for the **req_column** and **req_category** column. You can also access these tables through the **Organization Positions** window.

WARNING: Categories cannot exist without requirements. You will need to make sure you have also defined Categories.

1. Choose **PE, Admin, Task, Configuration, Personnel Configuration, Organization Jobs**. The **Organization Jobs** window appears.
2. Type in or select a **Job Code** by right-clicking and selecting a value.
3. Click on the **Requirements** tab.
4. With your cursor on the **Category** column, right-click and select **Maintenance Screen**. The **Maintain Table Values** window for the **req_category** appears.
5. Right-click and choose **Add Row**.
6. Enter a **Table Value** and **Description** for the **Category** you are defining.
7. Type the appropriate **Requirement Table Value** in the **Alternate Value 1** column for this **Category**. This will link **Requirements** and **Categories** together.
8. **Save**.
9. To define additional **Categories**, right-click and choose **Add Row**.

How to Enter Family Doctors

1. **Choose PE, File, Admin, Task, Configuration, Personnel Configuration, Family Doctors. The Family Doctor window appears.**
2. **Type in the Doctor ID or search for the Doctor's name first to make sure you don't enter the doctor into the system twice.**
3. **Type in the doctor information.**
4. **Save.**

For more information on doctors, see [Defining Family Doctors](#).

How to Define Jobs

NOTE: The **Code** column and **Description** column will have default information from the **Definitions** tab.

1. Choose **PE, File, Admin, Task, Configuration, Personnel Configuration, Organization Jobs**. The **Organization Jobs** window appears.
2. Type in the **Job Code** and **Description** of the code. Fill in other information on the **Definitions** tab if applicable.
3. **Save**.
4. To enter job requirements, click the **Requirements** tab.
5. Select **Option, Add Row** or right-click, **Add Row**.
6. Select a requirement from the **Requirement** column's drop-down list box.
7. Select a category from the **Category** column's drop-down list box.
8. **Save**.

How to Define Positions

NOTE: The **Position** column and **Title** column will have default information from the **Positions** tab.

1. Choose PE, File, Admin, Task, Configuration, Personnel Configuration, Organization Positions. The Organization Positions window appears.
2. Type in the Position Code and other information on the Positions tab.
3. Save.
4. To enter position requirements, click the Requirements tab.
5. Select Option, Add Row or right-click, Add Row.
6. Select a requirement from the Requirement column's drop-down list box.
7. Select a category from the Category column's drop-down list box.
8. Save.

How to Define Requirements (Org Jobs and Positions)

NOTE: You will define **Requirements** and **Categories** for both the Organization Jobs and Organization Positions through the **Maintain Table Values** windows for the **req column** and **req_category** column. You can also access these tables through the Organization Positions window.

1. Choose **PE, Admin, Task, Configuration, Personnel Configuration, Organization Jobs**. The **Organization Jobs** window appears.
2. Type in or select a **Job Code** by right-clicking and selecting a value.
3. Click on the **Requirements** tab.
4. With your cursor on the **Requirements** column, right-click and select **Maintenance Screen**. The **Maintain Table Values** window for the **req** column appears.
5. Right-click and **Add Row**.
6. Enter a **Table Value** and **Description** for the Requirement you are defining.
7. If this Requirement will be used as an **Incremental** value, type "Incremental" in the **Alternate Value 1** column.
8. **Save**.
9. To define additional Requirements, right-click and choose **Add Row**.

How to Define Your Organization's Supervisors

1. Choose **PE, File, Admin, Task, Configuration, Personnel Configuration, Supervisors**. The Supervisors window appears.
2. Choose **Option, Add Row** to add a new supervisor.
3. Type in the **ID Number of the supervisor and the number of employees they supervise**.
4. **Save**.

For more information on Supervisors, see [Defining Your Organization's Supervisors](#).

Windows

Configure Personnel Window

[PE](#) | [Admin](#) | [Task](#) | [Configuration](#) | [Personnel Configuration](#) | [Configure Personnel](#)

This window allows you to identify which accrual benefits you will use in the Personnel module.

Accrual Vacation Code

Accrual Sick Code

Accrual Holiday Code

Accrual Other Code

For more information about these accrual codes, see [Identifying Accrual Benefits](#). For instructions on how to bring up this window, see [How to Specify Accrual Benefits for the Personnel Module](#).

Family Doctor Window

[PE](#) | [Admin](#) | [Task](#) | [Configuration](#) | [Personnel Configuration](#) | [Family Doctors](#)

This allows you to enter doctors that employees at your organization use as their physician. This information is not stored on the Name Master table, rather it is on the Family Doctor Master.

Information that you can specify for each doctor:

Doctor ID (equivalent of the ID Number)	Work Phone
Last Name	Home Phone
First Name	Mobile Phone
Middle Name	Referred Employees #

Organization Jobs Window

[PE](#) | [Admin](#) | [Configuration](#) | [Personnel Configuration](#) | [Organization Jobs](#)

This window is used to define your organization's jobs, which are attached to organization positions.

There are two tabs on the window: the Definitions and the Requirements tabs.

Organization Positions Window

[PE](#) | [Admin](#) | [Task](#) | [Configuration](#) | [Personnel Configuration](#) | [Organization Positions](#)

This window allows you to define all positions to which employees are assigned at your organization. These are stored on the ORG_POS_MAST table. Many of the values you specify on a position serve as default information that appears automatically on the employee's Individual Positions row when you identify them with the position.

There are three tabs on the window: the Positions, Requirements, and Contract Text tabs.

Supervisors Window

[PE](#) | [Admin](#) | [Task](#) | [Configuration](#) | [Personnel Configuration](#) | [Supervisors](#)

This window allows you to monitor the number of employees at your organization who are supervisors. Each supervisor's name appears as well as the number of employees they supervise.

ID Number (Type the supervisor's Name-ID that identifies them on the Name Master table. You can perform a name search if necessary.)

Name (The supervisor's name appears.)

No. of Employees