

Slide 1

Slide notes: To create a new Employee Master Record, or to maintain an existing Employee record, we use the "Employee Master Record" option.

IES Client v8.25 : My IES
Help Submit Quit Functions Commands

Personnel Master

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Employee Number:

Title:

Family Name:

Given Name:

Date Of Birth:

Age:

Gender:

Department:

Current Job:

Job Level:

Work Tel or Extension:

Emp P/c Addr:

Employment Status:

Secondary Status:

Master Status:

Open / Closed Status Change:

By Who:

Reason for Change:

Master Rec Updates: -

Last Updated:

Updated By:

Slide 2

Slide notes: Employee Numbers are 'free format' keys, and are used according to our local policies and preferences. It is quite common to use a 4 or 5 digit numbering system.

The screenshot shows a web-based form titled "Personnel Master" within an "IES Client v8.25" window. The form is organized into several sections:

- Employee Identification:** Fields for Employee Number, Title, Family Name, and a "Given Name" dropdown menu.
- Personal Information:** Fields for Date of Birth, Age, Gender (set to "Male"), Department, Current Job, Job Level, and Work Tel or Extension.
- Employment Details:** Fields for Emp Pic Addr, Employment Status (set to "Current"), and Secondary Status.
- Master Record Information:** Fields for Master Status (set to "Open"), Open / Closed Status Change, By Who, and Reason for Change (set to "Resigned").
- Update History:** Fields for Last Updated and Updated By.

On the right side of the form, there is a vertical menu of blue hyperlinks for various actions: Update, Registration, Relations, Job Data, Contact and Housing, Education, Vehicle/Driving, Contract/Permit, Loans, Courses and Training, Personnel Actions, Closing Profile, Absence Profile, and Master Record History.

Slide 3

Slide notes: When we lookup or enter an existing Employee Key, then of course we will be able to maintain an existing Employee record. When we enter a new Employee Number, then we will create a new Employee Record.

Personnel Master

Employee Number: 1101
Title:
Family Name:
Given Name: 1
Date of Birth:
Age:
Gender: Male
Department:
Current Job:
Job Level:
Work Tel or Extension:
Emp P/c Addr:
Employment Status: Current
Secondary Status:
Master Status: Open
Open / Closed Status Change:
By Who:
Reason for Change: Resigned
Last Updated:
Updated By:

- Update
- Requisition
- Relations
- Job Data
- Contact and Housing
- Education
- Vehicle/Driving
- Contract/Permit
- Leave
- Courses and Training
- Personnel Actions
- Clocking Profile
- Absence Profile
- Master Record History

Slide 4

Slide notes: This is a new Employee Number.

The screenshot shows the 'Personnel Master' form in the IES Client v8.25. A dialog box titled 'SINGLE SELECT: DATA SELECTION' is open, displaying a table of titles. The table has two columns: 'KEY' and 'TITLE'. The data in the table is as follows:

KEY	TITLE
1	Dir
2	Sen
3	MSen
4	Mc
5	MSc
6	Prof

The background form includes the following fields and options:

- Employee Number: 1101
- Gender: Male
- Date of Birth: [Field]
- Age: 1.00
- Department: [Field]
- Master Status: open
- Reason for Change: [Field]

On the right side of the form, there is a vertical list of links: Update, Requisition, Rotation, Job Data, Contact and Housing, Education, Vehicle/Driver, Contact/Photo, Leave, Courses and Training, Personal Actions, Checking Profile, Absence Profile, and Master Record History.

Slide 5

Slide notes: Since the record is new, we are offered the standard Titles available on our local list, in order to select an appropriate title for the new Employee. The Employee Picture numbering system is automatic, and if we have already loaded the Employee picture prior to creating the new Employee Record, as in this case, then the picture shows immediately.

Personnel Master

Employee Number: 1101

Title: [Text Field]

Family Name: [Text Field]

Given Name: [Dropdown Menu]

Date of Birth: [Text Field]

Age: 1101

Gender: Male

Department: [Text Field]

Current Job: [Text Field]

Job Level: [Text Field]

Work Telephone Extension: [Text Field]

Emp Pic: 11ep1101-399

Employment Status: Current

Secondary Status: [Text Field]

Master Status: open

Open/Close Status Change: [Text Field]

By Whom: [Text Field]

Reason for Change: [Text Field]

Navigation Links: Update, Requisition, Rotation, Job Data, Contact and Housing, Education, Vehicle/Driver, Contact/Print, Loans, Courses and Training, Personal Actions, Checking Profile, Absence Profile, Master Record History

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Slide notes: Next, we will enter the Employee's Family Name and First Names.

Personnel Master

Employee Number: 1101
Title: Miss
Family Name: Willson

Given Name: 1

Date of Birth: 11/11
Age: 30
Gender: Male

Department: [Redacted]
Current Job: [Redacted]
Job Level: [Redacted]

Employment Status: Current
Secondary Status: [Redacted]

Master Status: open
Open / Closed Status Change: [Redacted]
By Whom: [Redacted]
Reason for Change: ***

Master Rec Updates: [Redacted]

Last Updated: [Redacted]
Updated On: [Redacted]

Update
Registration
Education
Contact and Housing
Vehicle / Drivers
Contract / Permit
Leave
Courses and Training
Personal Actions
Checking Profile
Absence Profile
Master Record History

Slide 7

Slide notes: It is true that there are some cases where Family Names are not generally used. In cases like that, we will usually capture the Employee's First or Given Name also as the Family Name.



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Personnel Master

Employee Number: 1101
Title: Lisa
Family Name: Wilson

Given Name: 1. Lisa

Sex: [M] | [F] | [A] | [U] | [O] | [D]

Date of Birth: 11/11
Age: []
Gender: [M] | [F]

Department: []
Current Job: []
Job Level: []
Work Telephone: []

Emp Pic: 11ep1101-399

Employment Status: Current
Secondary Status: []

Master Status: open
Open / Closed Status Change: []
By Whom: []
Reason for Change: ***

Master Rec Updates: []
Last Updated: []
Updated By: []

[Update](#)
[Registration](#)
[Rotation](#)
[Job Data](#)
[Contact and Housing](#)
[Education](#)
[Vehicle / Drivers](#)
[Contract / Permit](#)
[Leave](#)
[Courses and Training](#)
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Slide notes: Multiple First Names are allowed, but in this example, we have only 1.

Personnel Master

Employee Number: 1101
Title: Miss
Family Name: Wilson

Given Name: Lisa

Date of Birth: 11/11
Age: 39
Gender: Male

Department: Current
Employment Status: Current

Master Status: open
Reason for Change: ***

Update
Requisition
Rotation
Job Data
Contact and Housing
Education
Vehicle/Driver
Contact/Print
Loans
Courses and Training
Personal/Forms
Checking Profile
Absence Profile
Master Record History

Slide 11

Slide notes: The Date of Birth may be entered or retrieved via the Date lookup function. As soon as we enter it, the automatically calculated AGE display will adapt.



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Slide notes: Next we select the gender.



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Slide notes:



Slide 14
Slide notes:

Personnel Master

Employee Number: 1101
Title: Lisa
Family Name: Wilson

Given Name: Lisa

Date of Birth: 18/04/1982
Age: 28
Gender: Female

Department: [Blank]
Current Job: [Blank]
Job Level: [Blank]

Employment Status: Current
Secondary Status: [Blank]

Master Status: open
Open / Closed Status Change: [Blank]
By Whom: [Blank]
Reason for Change: [Blank]

Master Rec Updates: [Blank]

Last Updated: [Blank]
Updated On: [Blank]

Emp Pic: 11ep1101-399

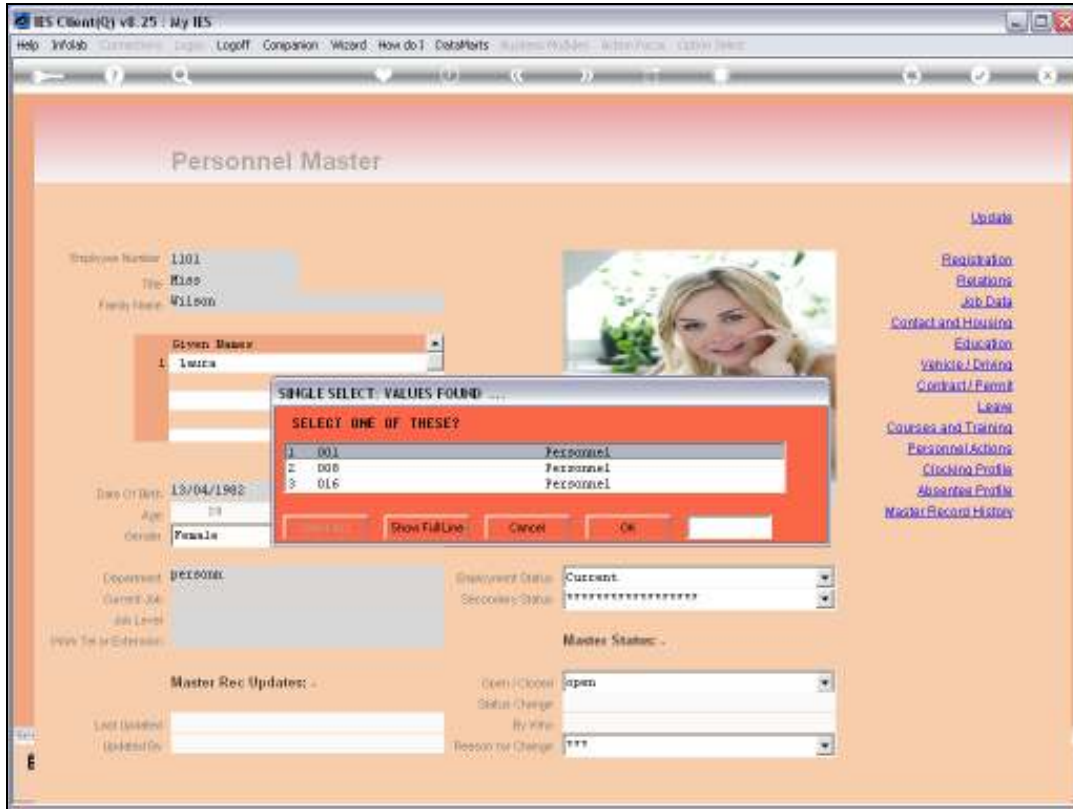
Update
Requisition
Requisition
Job Data
Contact and Housing
Education
Vehicle / Drivers
Contract / Permit
Leave
Courses and Training
Personal Scheme
Checking Profile
Absence Profile
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Slide 15

Slide notes: The Department is not a mandatory field, but if used, then we may now select the Department.



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Slide notes:



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Slide notes:

Slide 18

Slide notes: The Current Job also is not mandatory to indicate, but we may select it now.



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Slide notes:

Personnel Master

Employee Number: 1101
Title: Lisa
Family Name: Wilson

Given Name: 1. Lisa

Date Of Birth: 18/04/1982
Age: 28
Gender: Female

Department: 001 Personnel
Current Job: 159 SENIOR PERSONNEL OFFICER
Job Level:

Employment Status: Current
Secondary Status: *****

Master Status: open
Open / Closed Status Change: By Who: Reason for Change: ***

Navigation Links:
[Update](#)
[Registration](#)
[Rotation](#)
[Job Data](#)
[Contact and Housing](#)
[Education](#)
[Vehicle / Car](#)
[Contract / Permit](#)
[Leave](#)
[Courses and Training](#)
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Slide notes: The Job Level is a local classification of Job Level and may be captured or omitted.



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Slide notes: The Telephone Number or extension may also be stated now, or later, or not at all.

Personnel Master

Employee Number: 1101
 Title: Lisa
 Family Name: Wilson

Given Name: 1. Lisa

Date of Birth: 18/04/1982
 Age: 28
 Gender: Female

Department: 001 Personnel
 Current Job: 159 SENIOR PERSONNEL OFFICER
 Job Level: 3
 Work Station Extension: 102

Emp Pic URL: 11ep1101-399

Employment Status: Current
 Secondary Status: *****

Master Status: open
 Open / Closed Status Change: By Who: Reason for Change: ***

Master Rec Updates: -
 Last Updated: [Field]
 Updated By: [Field]

Navigation Links:
[Update](#)
[Registration](#)
[Rotation](#)
[Job Data](#)
[Contact and Housing](#)
[Education](#)
[Vehicle / Car and](#)
[Contract / Permit](#)
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Slide 23

Slide notes: The Employment Status field has a primary and secondary option, and we may use that in any way we see fit, i.e. to classify Employment status according to our local needs. In this case, we use CURRENT for an Employee that is currently employed here. If the Employee should at any stage no longer be employed here, then we will change the status but retain the historical record.

Personnel Master

Employee Number: 1101
Title: Lisa
Family Name: Wilson

Given Name: 1. Lisa

Date of Birth: 18/04/1982
Age: 28
Gender: Female

Department: 001 Personnel
Current Job: 159 SENIOR PERSONNEL OFFICER
Job Level: 3
Work Station Extension: 102

Emp Pic URL: 11ep1101-399

Employment Status: Current
Secondary Status: *****

Master Status: open
Open / Closed Status Change: By Who: Reason for Change: ***

Master Rec Updates: -
Last Updated: (date)
Updated By: (name)

Update
Registration
Rotation
Job Data
Contact and Housing
Education
Vehicle / Car
Contact / Email
Leave
Courses and Training
Personal Schemas
Checking Profile
Absence Profile
Master Record History

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Slide notes: The 2 status fields allow us to capture any new values, and will then remember them on the droplist for future use on other Employee records.

Personnel Master

Employee Number: 1101
 Title: Miss
 Family Name: Wilson

Given Name: Laura

Date of Birth: 18/04/1982
 Age: 28
 Gender: Female

Department: 001 Personnel
 Current Job: 159 SENIOR PERSONNEL OFFICER
 Job Level: 3
 Work Station Extension: 102

Emp Pic: 11ep1101-399

Employment Status: Current
 Secondary Status: *****

Master Status: Open / Closed
 Status Change: By Who: Reason for Change: 111

Master Rec Updates: -
 Last Updated: Updated By:

Update
[Registration](#)
[Education](#)
[Job Data](#)
[Contact and Housing](#)
[Education](#)
[Vehicle / Drivers](#)
[Contact / Email](#)
[Leave](#)
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Slide 25

Slide notes: A currently employed person usually has a state of OPEN for the master record, and we may use the CLOSED state when the Employee is no longer employed here.

Personnel Master

Employee Number: 1101
 Title: Miss
 Family Name: Wilson

Given Name: 1. Laura

Date of Birth: 18/04/1982
 Age: 28
 Gender: Female

Department: 001 Personnel
 Current Job: 159 SENIOR PERSONNEL OFFICER
 Job Level: 3
 Work Station Extension: 102

Emp Pic: 11ep1101-399

Employment Status: Current
 Secondary Status: *****

Master Status: Open / Closed
 Status Change: By Who: Reason for Change: 001

Master Rec Updates: Last Updated: Updated On:

Update
 Requisition
 Rotation
 Job Data
 Contact and Housing
 Education
 Vehicle / Car
 Contact / Email
 Loans
 Courses and Training
 Personal Actions
 Checking Profile
 Absence Profile
 Master Record History



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Slide notes: We have now conformed to the minimum requirements of an Employee record in the system, and at this stage it is advisable to create the new Employee record by choosing UPDATE.

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Employee Number:

Title:

Family Name:

Given Name:

Date Of Birth:

Age:

Gender:

Department:

Current Job:

Job Level:

Work Tel or Extension:

Emp P/c Addr:

Employment Status:

Secondary Status:

Master Status:

Open / Closed:

Status Change:

By Who:

Reason for Change:

Master Rec Updates: -

Last Updated:

Updated By:

Slide 27

Slide notes: We can then retrieve the newly created, but now active record, to enter more details, dependent on our local policies for Employee details.

IES Client(v8.25) v8.25 : My IES
Help Submit Quit Functions Commands

Personnel Master

Employee Number
Title
Family Name
Given Name
Date Of Birth
Age
Gender
Department
Current Job
Job Level
Work Tel or Extension
Emp Pct Adsk
Employment Status: -
Secondary Status
Master Status: -
Open / Closed Status Change
By Who
Reason for Change
Last Updated
Updated By
Update
Requisition
Relations
Job Data
Contact and Housing
Education
Vehicle / Driving
Contract / Permit
Leave
Courses and Training
Personnel Actions
Clocking Profile
Absence Profile
Master Record History

Slide 28
Slide notes:

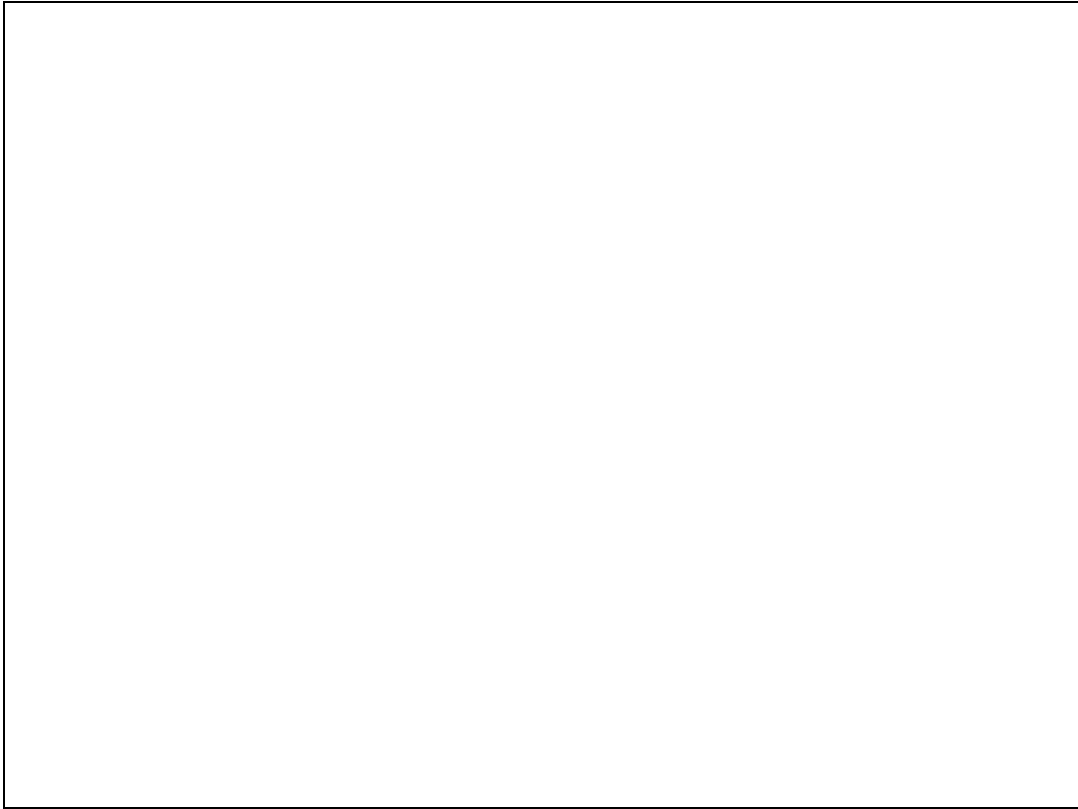
Personnel Master

Employee Number: 1101
Title:
Family Name:
Given Name: 1
Date of Birth:
Age:
Gender: Male
Department:
Current Job:
Job Level:
Work Tel or Extension:
Emp P/c Addr:
Employment Status: Current
Secondary Status:
Master Status: Open
Open / Closed Status Change:
By Who:
Reason for Change: Resigned

Update
Requisition
Relations
Job Data
Contact and Housing
Education
Vehicle/Driving
Contract/Permit
Leave
Courses and Training
Personnel Actions
Clocking Profile
Absence Profile
Master Record History

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Slide notes:



Slide 30

Slide notes:



Slide 31
Slide notes:

Personnel Master

Employee Number: 1101
Title: Lisa
Family Name: Wilson

Given Name: 1. Lisa

Date of Birth: 18/04/1982
Age: 28
Gender: Female

Department: 001 Personnel
Current Job: 159 SENIOR PERSONNEL OFFICER
Job Level: 3
Work Station/Extension: 102

Emp Pic URL: 11ep1101-399

Employment Status: Current
Secondary Status: *****

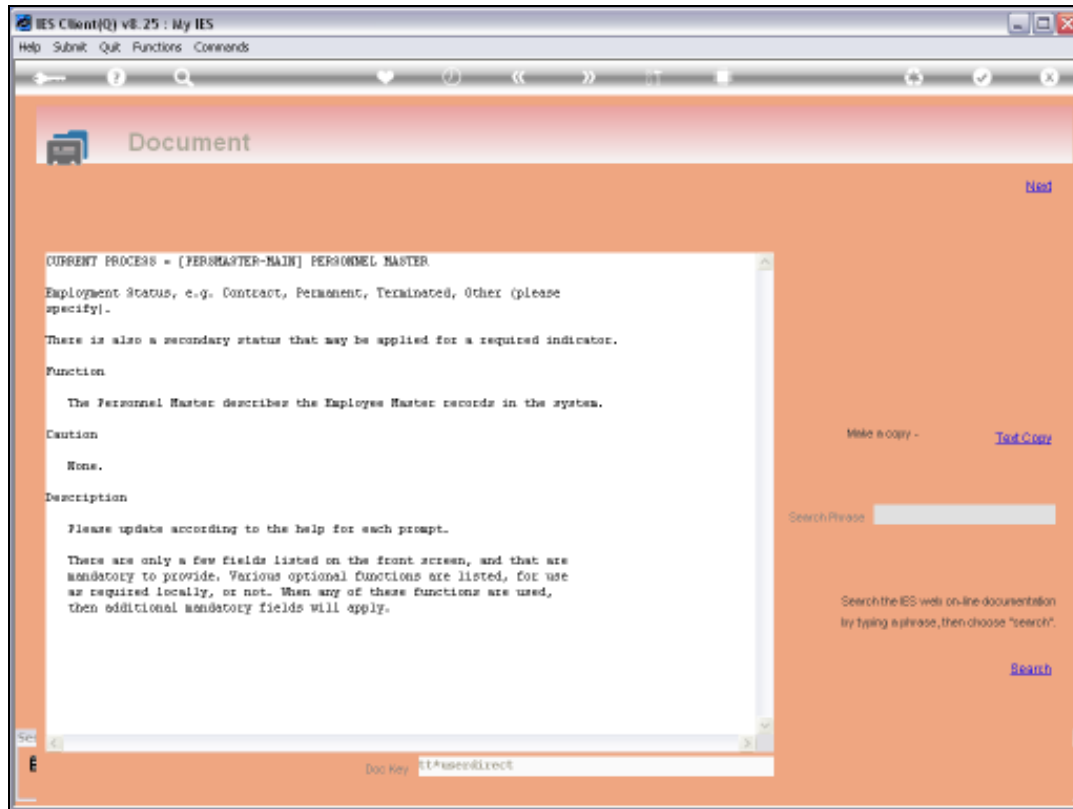
Master Status: open
Open / Closed Status Change: By Who: Reason for Change: ***

Master Rec Updates: -
Last Update: 26/02/2010
Update By: HACTY

Update
Registration
Rotation
Job Data
Contact and Housing
Education
Vehicle / Car
Contact / Email
Leave
Courses and Training
Personal Schemes
Checking Profile
Absence Profile
Master Record History

Slide 32

Slide notes: Since the Employee Record now exists, we may use this option at any time for maintenance on the Employee Master record, and we may amend and edit any of the fields on the Employee Master.



Slide 33

Slide notes: This is the HELP entry for the Employee Status field, explaining how it may be used.



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Slide notes:



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Slide notes:



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Slide notes:



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Slide notes:

Personnel Master

Employee Number: 1101
 Title: Lisa
 Family Name: Wilson

Given Name: 1. Lisa

Date of Birth: 18/04/1982
 Age: 28
 Gender: Female

Department: 001 Personnel
 Current Job: 159 SENIOR PERSONNEL OFFICER
 Job Level: 3
 Work Station/Extension: 102

Emp Pic: 11ep1101-399

Employment Status: Current
 Secondary Status: *****

Master Status: Open
 Open / Closed: Open
 Status Change: By Who:
 Reason for Change: 111

Master Rec Updates:
 Last Update: 26/02/2010
 Update By: 11017

Update
 Requisition
 Rotation
 Job Data
 Contact and Housing
 Education
 Vehicle / Car
 Contact / Email
 Loans
 Courses and Training
 Personal Schemes
 Checking Profile
 Absence Profile
 Master Record History

Slide 38

Slide notes: On the right hand side, we have a range of functions for entering further information on this Employee. Some of these options may be used locally, and some not, depending on our needs. We will discuss each of these functional options in separate tutorials.



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Slide notes: