
Personal Data Module

User Guide – V 12.0

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Personal Data is the core of the Parklane System. There are a number of functions within this module that are critical to the overall systems operation. The Department and Group structure setup for accurate data entry and extraction. The Employee demographic information which can be manually entered or electronically downloaded. And the master table of up to 1,000 user-defined Attributes, or descriptions used by various modules to build detailed data bases of reportable information. A variety of additional features exist in Personal Data and are also described in this user guide.

Options

Departments & Groups

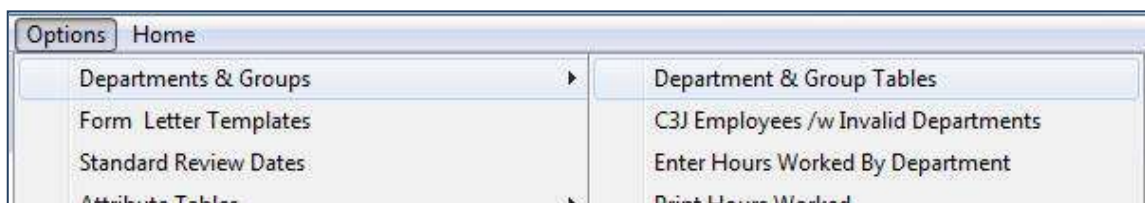
Before you use the system, it must be populated with your organization's employees. There are two fields that must be completed to have valid employee records – Department and Surname. If you manually enter employee demographic data and plan to run a Data Transfer in the future, make sure that the Social Insurance Number/Social Security Number is also entered on every employee record to ensure that duplicate employee records are not created by the Data Transfer.

As such, one of the first steps to making the system operational is the setup of the Department table. The Department table defines your organization's structure for reporting purposes in this, and other modules. As part of the initial system setup, the Client is asked to complete a questionnaire which asks for a listing of department Codes (10 digits or less) and a Department Description (25 digits or less). The system will include these predefined fields at the time of installation. If the Client has arranged to have a download of their employee demographic information from another source, and when the Department Description field has been completed, the Data Transfer will automatically add the Department Code and Description to the Department Table. If the department already exists in the table, the Data Transfer will update the table with the Description if provided.

If no Data Transfer of employee demographic information is being generated, all department additions will need to be entered manually.

Departments & Group Tables

- In Personal Data click on **Options/Departments & Groups/Department & Group Tables**.



The Department Panel notes the current number of Active and Terminated employees in each department, and if setup, also shows the Group Set and Group Assignment for each department.

The screenshot shows the 'CC17 Manage Departments and Groups' window. On the left is a sidebar menu with options: 'Department Table', 'Add Departments', 'C2B List or Export Depts', 'Import Departments', 'Define Group Sets', 'Select A Group Set', 'Enter Group Names', 'Assign Departments to Groups', and 'C45 List Depts in Groups'. The main area is titled 'CC26 Department Table' and contains a table with the following data:

Abbreviation	Description	Active	Term	1	2	3	4	5
12349	Operator	2	3	4	2	1	2	1
56881	Fairmont PS - Princ	3		7	2	2	2	1
56882	Fairmont PS - VP			7	2	2	2	1
56883	Fairmont PS - Teacher	8	1	7	2	4	2	1
8844-3	DoNotUse							

Choose **Add Departments** to add departments. Click on the Abbreviation field and enter a department abbreviation up to 10 characters. Tab across to the Description field and enter the name of the department up to 25 characters.

The screenshot shows the 'CC17 Manage Departments and Groups' window. The sidebar menu is the same as in the previous screenshot, but the 'Add Departments' option is circled. The main area is titled 'CC25 Add Departments' and contains a form with the following structure:

	Abbreviation	Description
1	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>

A hierarchy of reporting structure can be developed using Group Sets. A maximum of 15 Groups Sets may be defined. In Personal Data click on **Options/ Departments & Groups/Department & Group Tables**. Choose **Define Group Sets** from the Sidebar menu to add the Group Set name.

Parklane

CC17 Manage Departments and Groups

Department Table
Add Departments
C2B List or Export Depts
Import Departments
Define Group Sets
Select A Group Set
Enter Group Names
Assign Departments to Groups
C45 List Depts in Groups

CC4A Define Group Sets

	Name of Group Set
1	Corporate Group Set
2	Director Group Set
3	Location Group Set
4	VP Group Set
5	NON EMPLOYEES
6	ALL Group Set
7	Site Group Set
8	Zone Group Set

To Add A Group Set:
Go to the first blank line and type the name of the Group Set. Never leave a blank line between Group Sets.

Click on the next available field and enter the name of the Group Set.

The next step will be to define the **Groups** within each Group Set.

On the Sidebar menu select **Select a Group Set**. From the list provided, choose the Group Set in which Groups are to be defined.

CC40 Select a Group Set

Org Chart Group Set	<p>To define your Work Groups and assign Departments to each group, first select the Group Set from the list.</p> <p>From the sidebar select: Enter Group Names or Assign Departments to Groups</p>
Director Group Set	
Location Group Set	
VP Group Set	
All in One	
Test w Blank Groups	
Elem/Sec	
JH&S	
Program Group Set	
Site Group Set	

On the Sidebar menu select **Enter Group Names**.

CC46 Enter Group Names

Group Name

- Administration
- Plant Services
- Health Services
- Information Services
- Maintenance
- Food Services

You are working with
Group Set: 01. Org Chart Group Set

Don't leave blank lines interspersed between group names

Define the Group Names by clicking on a numbered field and entering the name of the Group.

Next, Departments must be **assigned** to each Group Set under the appropriate Group Name. On the Sidebar menu select **Assign Departments to Groups**. Click on a Group and press **Select F2**.

CC47 Assign Departments to Groups

You are working with
Group Set: 01. Org Chart Group Set

Group Selected

- 0001 Administration
- 0002 Plant Services
- 0003 Health Services
- 0004 Information Services
- 0005 Maintenance
- 0006 Food Services
- 0007 Fairmont PS
- 0008 Tweedsmuir PS
- 0009 Prof Practices
- 0010 Div 11

Select F2

Department	Check if Department belongs in this group	Group Assignment
12349	Operator	Information Services
56881	Fairmont PS - Princ	Fairmont PS
56882	Fairmont PS - VP	Fairmont PS
56883	Fairmont PS - Teacher	Fairmont PS
8844-3	DoNotUse	
884401	Tweedsmuir PS - Princ	Tweedsmuir PS
884402	Tweedsmuir PS - VP	Tweedsmuir PS
884403	Tweedsmuir PS - Teacher	Tweedsmuir PS
A-ADMIN	T-Admin	Prof Practices
A1234-1	A Admin Sec	Prof Practices
ABC123	Southlake HR	Administration
ABC234	Southlake HC	Health Services
ADMIN	Admin 1	Administration

Check boxes will appear next to unassigned departments. In the example above, the group “Administration” was chosen. Check the boxes corresponding with the departments belonging to Administration.

These steps must be repeated for each Group defined within each Group Set.

Move Employees

This feature will move all employees from one department to another.

On the Sidebar menu click **Move Employees**. Click on the arrow under originating department to access the department list and choose employees department you wish to move. It will auto-fill the abbreviation and description.

CC24 Move people from one department to another

Originating Department		Destination Department	
1	A-ADMIN	F2 T-Admin	HR
2			
3			

Human Resources

SL28 Select a Department

Code	Description
56883	Fairmont PS - Teacher
ADMIN	Administration
CONTRACT	Contractors
FINANCE	Finance
HEALTH	Employee Health
HR	Human Resources
IT	Information Technology
KML1234	Kitchener - Sub office
L&L 2010	Logistics
MAINT	Maintenance
MN234	MN FOOD SERV
PHYSICIANS	Physicians
PLANT	Plant
UNKNOWN	Unknown
VOLUNTEER	VOLUNTEER
VOLUNTEERS	Volunteers
WARDNW	North West Wing
WAREHOUSE	Warehouse
WELD SHOP	Welding Shop
ZZNONSTAFF	NON STAFF

Search Name

Search Code

F1 > Sort by Name

F2 > Sort by Code

Next click on the arrow under Destination Department to access the department list and choose the department you wish to move employees to and it will auto-fill the abbreviation and description.

CC24 Move people from one department to another

Originating Department		Destination Department	
1	A-ADMIN F2	T-Admin	HR F3
2			Human Resources
3			

Press **Start F5** to initiate the move of all the employees from the originating department to the destination department. A note will appear indicating the move was completed.

Start F5

Remove Obsolete Departments

This feature will compare each department with the employee records to determine if the department is still being used. If not, it will delete the department from the system. This will also delete any exposure hours associated with the obsolete department. A password is required to execute this feature.

Enter Hours Worked

Options	Home
Departments & Groups >	Department & Group Tables
Form Letter Templates	C3J Records /w Bad Departments
Standard Review Dates	Enter Hours Worked By Depart.
Attribute Tables >	Enter Hours Worked By Group
Skill Sets Table	Print Hours Worked
	Import Hours Worked

Hours worked may be entered monthly in order for the Inc/WSIB module to calculate your organizations accident frequency and severity rates by Departments or Groups and to generate analysis and performance reports in the Attendance Management Module. Hours can be entered manually or imported electronically. In Personal Data click on **Options/Departments & Groups**. Select an entry option by Department or Group and follow the panel instructions. To access the record layout information for electronic entry, click on **Import Hours Worked**.

CC71 Enter Hours Worked by Department

Period

Department

Total Hours Worked by Month

January	<input type="text"/>
February	<input type="text"/>
March	<input type="text"/>
April	<input type="text"/>
May	<input type="text"/>
June	<input type="text"/>
July	<input type="text"/>
August	<input type="text"/>
September	<input type="text"/>
October	<input type="text"/>
November	<input type="text"/>
December	<input type="text"/>

If you have already entered hours by group be careful about entering hours by department. You can't do both.

If you choose to enter hours by department, the system will delete the current hours by group and, using the department hours, create new totals for each group.

If you are unsure of the implications, contact Parklane.

Import Hours Worked

Record Layout for Electronic Download of Hours Worked

Parklane Demo Data
 Personal Data
 Hours Worked Record Layout

File Format: ASCII, Un-delimited
 File Id: HSHOURS.DAT or your choice
 Record Length: 27 Characters

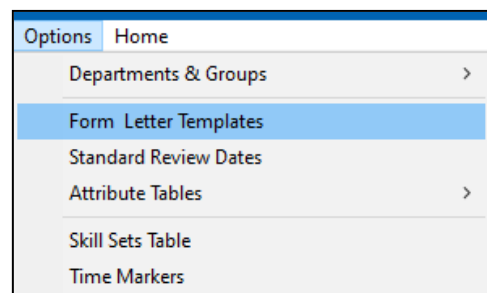
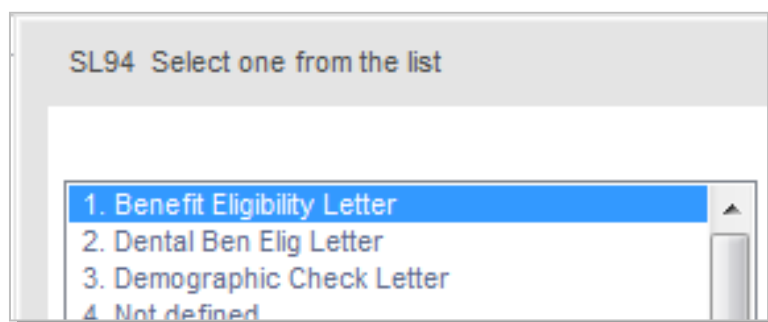
Field	Alpha/Num	Length	Comments
Department	A	10	Must be a valid department code in the System or translated in Maintenance
Period	N	6	Format = YYYYMM
Hours Worked	N	9	Totals hours worked for the period. This number will replace any hours currently in the system for the department & period specified (if applicable).
Filler	A	2	can be spaces or CR & LF

If you are running multi-company, you must create one file for each company and run each one separately. It is suggested that each file has a name that identifies the company.

Form Letter Templates

Form Letters can be used to send notices or letters to your employees. To create up to 100 templates, click on **Options/Form Letter Templates**

Choose an existing Template, or Not Defined (to create a new one).



Name the Form Letter and then begin to compose the letter using text and variables which will auto-fill when a form letter is printed for an employee.

GC2E FormLetter Templates

a) Name of Form Letter:

b) Variables:

- Today's Date
- First Name
- Last Name
- First & Last Name
- Address
- City, Province
- Country
- Postal Zip Code
- Foreign Phone
- EE ID
- Department Code
- Department
- Position
- Supervisor
- Telephone
- S.I.N.
- Status
- Union
- Employment Date
- Birth Date
- Marital Status
- Sex
- Contact Name
- Physician
- Physician Address
- Physician City
- Physician Postal
- Physician Phone
- Health No.

To indicate the location of a variable:

1. Type ^ [Shift &] in the letter.
2. [Tab] at this point will move cursor to Variables.
3. Click on or down/up arrows to variable name.
4. Select F4.
5. Variable will be inserted and cursor will return to the letter.

Page 1 F6
Page 2 F7
Page 3 F8

Select F4

Print Font Size: ☒ 9 pt ☐ 10 pt ☐ 12 pt Changing font size may require reformatting your letter. Be sure to print a sample.

Instructions F1 Print F5 List F2 Exit F12

Click the **Instruction F1** button to see detailed instructions and additional features in **Form Letters**.



Form Letter Templates

Introduction

Form Letters give you the means to set up letters that you will use repeatedly.

You initially create a template for a letter and from that point on, you may easily produce personalized letters with the original text and applicable information included.

The letters may then be printed or emailed directly from the software. All emailed form letters are automatically added to Document Links.

A form letter may be one to three pages in length.

How to Use

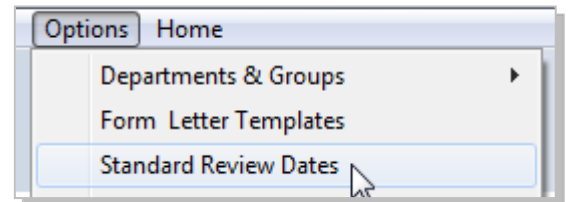
Template

Select a template from the list.

- For a new template, select the first 'Not Defined'.
- Provide a name or description of the template.
- Under "Variables" there is a list of the personalized information that can be inserted in the template.
- In the Template area, type the text as it is to appear in the letter.
Where a variable is to be inserted, type ^ (Shift 6) and click on the appropriate variable. The software will reserve space for the variable.
- If you need more than one page, you may switch to Page 2, then Page 3. Three pages provided 24000 characters of text.
- Indicate the size of the font (9 pt, 10 pt or 12 pt).
Due to font size and spacing, be sure to print a sample to ensure that text fits on the page.

Standard Review Dates

- **Standard Review Dates**, or global reviews, for your organization can be defined under **Options/Standard Review Dates**. Read the panel instructions for details.



CC13 Standard Review Dates

	Interval (Days)	Activity
1	5	filled out new hire forms
2	10	benefit forms filled out
3		
4		
5		
6		
7		
8		
9		
10		
11		

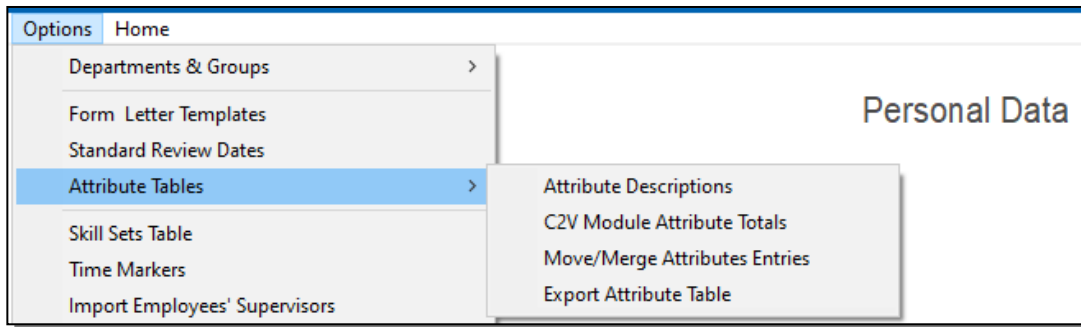
You may enter standard or routine activities (procedures or tasks) that are normally done when following up on an employee. For each activity you may identify the interval of the procedure in relation to today's date. You may define up to 50 pre-defined procedures. On this screen, enter:

Interval Days:
This number will be used to determine the target date for this activity. The target date will be based on today's date plus the number of interval days including weekends.
This number must be:
Between 1 and 366 days.
Or, for 18 months enter 540 (1 year, plus 180 days).
Or, for 2 years enter 730.

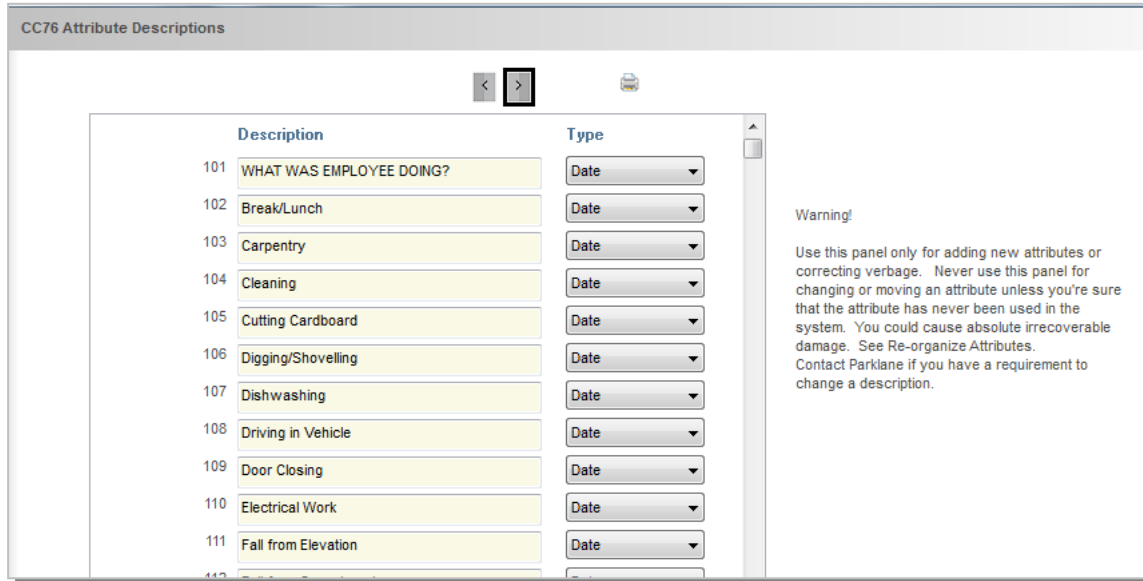
Activity:
Enter the procedure to be done.
Once your standard or routine activities are defined:
For an employee, go to the Review Dates screen and click the "Standards" button. The system will apply the standard or routine activities and determine the target date for each task.

Attribute Tables

Attributes are a table of descriptors or tags. This master list of up to 1,000 user-defined Attributes may be used by various modules to build detailed data bases of reportable information. To define your attribute list click on **Options/Attribute Tables/Attribute Descriptions**. Add a Description to any blank field and choose a Type from the drop down menu. Selection of “Date” in the Type column will attach the record date to any selected attribute.



Attribute Descriptions



The Attribute Table can be exported to a text file by selecting the **Export Table** feature on the drop down menu of **Options/Export Table**.

Move/Merge Attribute Entries

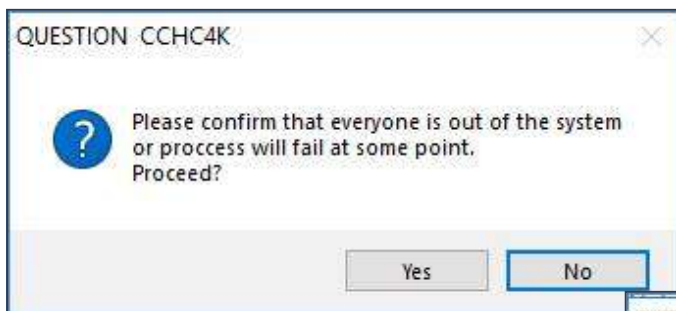
The Move/Merge Attribute Entries feature provides functionality to move or merge Attribute descriptions and all associated system data from one number to another. Print the C2V Counts report before proceeding.

All users must be out of the system before using this feature.

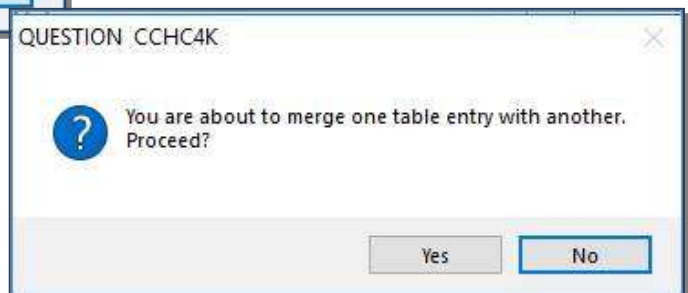
Enter the attribute number you want to move/merge in the **From Table no.** field and press Tab. Enter the number you want the attribute to move to or merge into in the **To Table no.** Enter or revise the attribute Description if needed. Select **Go SF4** to proceed with the move/merge.

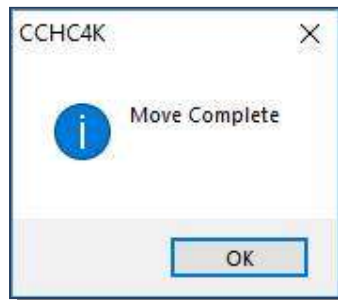
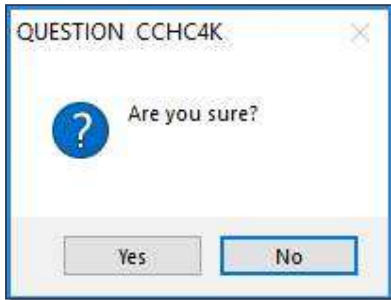
The screenshot shows a dialog box titled "CC4K Move/Merge Attribute Table Entries". At the top, it states "All users must be out of the system before using this procedure." and has a "SF5 C2V Counts" button. Below this are two input fields: "From Table no." and "To Table no.". A "Go SF4" button is positioned below these fields. To the right is a list of 24 attributes, numbered 1 through 24, including Head, Face, Eye, Ear, Teeth, Neck, Chest, Back (Upper/Lower), Abdomen, Pelvis/Groin, Shoulder LT, Arm Upper/LT, Elbow LT, Arm Lower LT, Wrist LT, Hand LT, Finger(s) LT, Hip LT, Leg Upper/LT, Knee LT, Leg Lower LT, Ankle LT, and Foot LT. Below the input fields, there is a "Recommendation" section with two steps: 1. Before moving a table entry, produce a copy of report C2V table counts. 2. After you move a table entry, reproduce report C2V table counts. A note follows: "Note: When merging, the 'after' counts may be less than total of 'from' and 'to'." At the bottom, a warning states: "If system should fail during processing: Determine problem and immediately redo last table entry move which will move the remaining table entries. This is critical."

A question box will appear asking you to confirm that all users are out of the system. If all users are not out of the system, the process may fail.



If merging one attribute into another, a question box will appear to confirm and a second question box asking if you are sure you want to merge into another attribute. A message box will confirm the move/merge is complete.

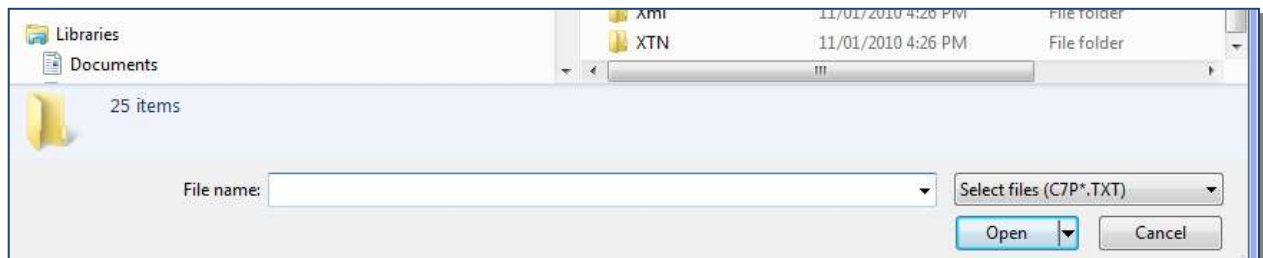
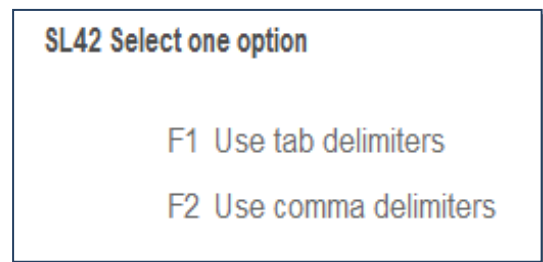
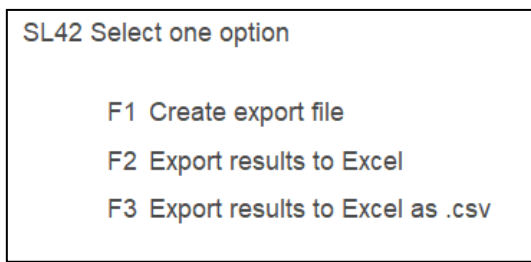




Print the C2V Counts report and compare with the initial report run prior to running this process.

Export Table

This feature allows the user to export the Attribute Table by creating an export file with tab or comma delimiters or by sending the file directly to Excel. Click on the selected option, indicate the location and name of the file and proceed with on panel instructions.



Skill Sets Table

This feature gives users the means to track employee levels of education, skills, courses, seminars, certifications, etc. The associated reporting allows the user to search the data base and find those employees who have specific levels of education, skills, or taken specific courses. Up to 5,000 skill types can be tracked.

To begin using the Skills Set feature, the user must first define the categories to be tracked. Click on **Options/Skills Sets Table**. The name of the category can be revised if necessary. Enter the field number and press tab, enter the field **Description** and press tab, enter the field **Abbreviation** and press tab. Continue the above process until this Category is complete.

Category: Courses

No.

Description:

Abbreviation:

Go to:

- F1 Courses
- F2 Languages
- F3 Training
- F4 Performance Review
- F5 Targeted Positions
- F6 Equipment
- F7 Attendance
- F8 Vaccines
- F9 COVID Testing
- F10 Category 10

Current Descriptions

- 0001. First Aid
- 0002. CPR
- 0003. Swim Safe
- 0004. Hand Hygiene
- 0005.
- 0006
- 0007.
- 0008
- 0009.
- 0010.
- 0011.
- 0012.
- 0013.
- 0014.
- 0015.
- 0016.
- 0017.
- 0018.
- 0019.
- 0020.
- 0021.
- 0022.
- 0023.
- 0024.
- 0025.
- 0026.
- 0027.
- 0028.
- 0029.

To enter a record for an employee, see the section on **Skills Set** on page 25.

Import Employee's Supervisor (OLIR)

An import file can be built which will populate the Supervisor name and title on the employee's Personal Data record. For instructions and the record layout to create this file click on **Options/Import Employees' Supervisors/F3 View record definition**. A link will be established to the internet which will open the instruction document.

Import Email Addresses

An import file can be built which will populate the Email Address on the employee's Personal Data record. For instructions and the record layout to create this fill click on **Options/Import Email Addresses/F3 View record definition**. A link will be established to the internet which will open the instruction document.

Import Badge or Card Numbers

An import file can be built which will provide alternative access to an employee through the Parklane SIMON or KICS products by swiping a card with a bar code or magnetic strip. For instructions and the record layout to create this file click on **Options/Import Badge or Card Numbers/F3 View record definition**. A link will be established to the internet which will open the instruction document.

Reassign Staff, Review Dates

As staff depart, vacation, take leave, or changes in user caseload are necessary, this utility provides the ability to permanently or temporarily change the Managing Staff field for all outstanding Review Date records from one User ID to another. In the case of a temporary reassignment, the records can be reassigned back to the original user or another user.

Under **Options** select **Reassign Managing Staff on Review Dates**. Select the intended procedure by clicking on the radio button. Type or select the User ID of the Managing Staff the records will come from, then type or select the User ID of the Managing Staff the records will be reassigned to and press Continue F5.

The screenshot shows the 'Options' menu with the following items: Departments & Groups, Form Letter Templates, Standard Review Dates, Attribute Tables, Skill Sets Table, Time Markers, Import Employees' Supervisors, Import Email Addresses, Import Skills Set, Import Badge or Card Numbers, Export File for Badge Import, Data Purge / Destruction, Reassign Staff, Review Dates (highlighted), and C3R Temporary Staff Reassigns.

The 'Managing Staff' utility window shows the 'CT3L Change Managing Staff' screen. It has three radio buttons for indicating the procedure to perform. The second option, 'Regarding a Staff Member who is temporarily unavailable: Assign records to another staff member with the intention those records might be reassigned back or, to another person.', is selected. The 'From' field contains 'KFERRELL' and the 'To' field contains 'SARA'. The 'Change Managing Staff on outstanding review dates' checkbox is checked. A confirmation dialog box titled 'QUESTION' is overlaid, asking 'Reassigning KFERRELL to SARA Change Review Dates. Temporary reassignments. Continue?' with 'Yes' and 'No' buttons.

Once the utility is complete, a report will be generated which provides the details of the reassignment.

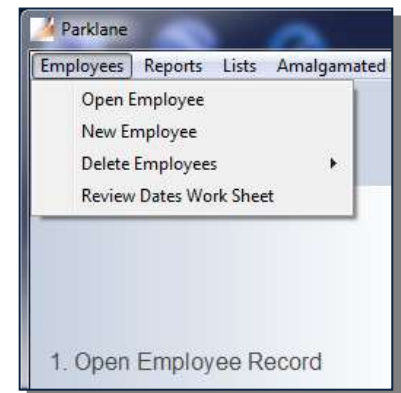
PKD-Company 1				Page	0001	C3T
Personal Data				Date	30 Mar 17	
Review Dates Reassigned from KFERRELL to SARA				Time	10:01	
Temporarily Assign						
Employee	Date	To Be Done	Key			
AARON, PETER 125 tF/t	13 Mar 17	cccccccccccccccccccccccccccccc	25			
AARON, PETER 125 tF/t	20 Mar 17	ssssssssssssssssssssssssssss	25			
AFFRAID, BERT 2142 F/t	11 Nov 17	KPI REQUIRED BY NOV 30/17	142			
ANDERSON, JENNI 2160 F/t	30 Jan 17	xxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	160			
ANDERSON, JENNI 2160 F/t	22 Feb 17	ELIGIBLE FOR DENTAL BENEFITS	160			
ANDERSON, JENNI 2160 F/t	21 Mar 17	cccccccccccccccccccc	160			

Employees

Open/New Employees

The next significant function in Personal Data is to maintain employee demographic information that is used by the other modules. Click on **Employees**, choose **New Employee** to manually add, or click on **Open Employee** to see current employee demographics information.

NOTE: Populate electronically by using the Data Transfer feature. (See the User Guide on Importing Your Employee Demographics.)



Selecting an Employee

CT30 Search for Employee

Open Employee Record

First Name

Search keyword Go F7

F1] Last Name Go F4

System Assigned Key Go F3

Department Code F8

Employee no. or ID Go F2

Includes terminated employees F5 Get last employee ABRAHAMS, PE

F6 Show last 25 employees you accessed, by last time accessed

SF6 Show last 25 employees you accessed, by last name

01 Work Detail

02 SIN,SSN & Salary

03 Personal

04 Contact, Health

05 Attributes

06 Skill Sets

07 General Comments

08 Review Dates

09 Form Letters

10 Module Usage

11 Document Folder

12 Document Links

13 Employee Labels

14 Employee Activity

15 TMB Audit

16 User Notes & Email

17 Demographics

18 In a Nutshell

Employee Records consists of several panels of information.

You may select the appropriate panel from the Sidebar menu on the left of the Employee Record Information Panel. Each panel reveals more information about the selected employee.

Alternatively you can use the control functions noted on the bottom of the panel to move from one panel to another.

Using keyboard: [Ctrl Return] Go to any panel
[Ctrl a, etc] Move cursor to field labeled a) etc.

Last Panel CtrlQ

Next Panel CtrlW

Next Person Esc

Home F11

Menu F12

Work Detail

CC02 Work Detail

☐ g) Prohibit access to this employee's records.
(However, records will appear on reports.)

☐ b) Works Multiple Departments / Positions

a) First Name Last Name

Department Fairmont PS - Teacher

Status

Position

Position Date

Union

Hire Date ☐ Rehire

Termination Date

d) Employee Id. System Key

Daily Hours

Weekly Hours

Work Hours to

Seniority Date

Last Review Date

Next Review Date

Years Experience ☐ Months

Supervisor's Last Name First Name Title

f) Miscellaneous

Miscellaneous 2

Miscellaneous 3

SIN, SSN & Salary

CC09 SIN,SSN & Salary

Social Insurance No. **Warning. SIN is invalid**

Salary & Date

Exemptions Amount Code

Federal

Provincial

Salary History	Salary	Type	Salary Date	Date
	35.00	Hourly	03/01/2022	16/11/2022
	35.00	Hourly		05/04/2022

Personal

CC03 Personal	
a) Address	155 NUT ROAD
City, Province	LONDON ONTARIO
Province Code	ON
Postal Code	GIX5C3
Country	CANADA
f) Birth Date	10/10/1964
Gender	Male
Marital Status	Married
Language	ENGLISH
Contact Information	
b) Home Phone	416 222-2222
Business Phone	519 657-3386 Ext. 2240
Cell or Foreign	416 222-3333
d) Business Email Address	k.ferrell@parkianesys.com <input type="checkbox"/> N/A
Personal Email Address	
Badge Number	
Badge as of	

Contact, Health

CC04 Contact, Health	
Contact Information	
a) Emergency Contact	MARY ABRAHAMS
	EMERG CONTACT AT SPOUSES WORK
Telephone	237 224-9876
Additional Info.	SPOUSE
b) Physician	DR. DOLITTLE
	PHYSICIAN AT OFFICE ADDRESS
Physician Address	87 PINE ST
City, Province	LONDON, ON
Postal Code	N6V 2L8
Telephone	519 453-0098
Health Information	
d) Health Number	987654321
L.T.D./L.T.J.P.	06/09/2021
LOA Start Date	09/10/2021
LOA Stop Date	25/12/2021
Maternity Start Date	01/05/2022
Maternity Stop Date	31/08/2022
Estimated Delivery	05/05/2022

Attributes

Attributes that are unrelated to a specific Parklane module can be highlighted using the Attributes panel in Personal Data. Up to 20 dates can be captured for any one attribute. Click on the appropriate attribute and click **Select**, followed by entry of a date. **Comments** regarding the attribute can be entered below the data entry fields. The **Reports/Attributes** dropdown provides several reports related to highlighted attributes.

CC06 Attributes

F5 Print Attributes

F4 Toggle List

F6 Sort Table

0001 Head

<

>

Dates

a)

b) Comments

d) List of all attributes

1 Head
2 Face
3 Eye
4 Ear
5 Teeth
6 Neck
7 Chest
8 Back (Upper)
9 Back (Lower)
10 Abdomen
11 Pelvis/Groin
12 Shoulder LT
13 Arm Upper LT
14 Elbow LT
15 Arm Lower LT
16 Wrist LT
17 Hand LT
18 Finger(s) LT
19 Hip LT
20 Leg Upper LT
21 Knee LT
22 Leg Lower LT
23 Ankle LT
24 Foot LT
25 Toe(s) LT
26 Shoulder RT

Select another attribute by clicking on the attribute above, then Select.

Select F3

Skill Sets

To enter a record for an employee, **open an employee** record, select the employee and from the Sidebar menu click **Skill Sets**. Choose the **Category** from the drop down menu and press tab, choose the **Skill** from the drop down menu and press tab. Continue to fill in the remaining fields as required.

CC08 Skill Sets

F6 Add Record F4 List of Skills F5 Print SF7 Remove Record

Category: **Seminars & Courses** Skill: **Project & Time Management**

Category and Skill are mandatory fields.

Description: **Project & Time Management**

Add'l Information: **Session 1**

Dates: **26/06/2023**

Institution: **Business Management Institute**

Location: **Toronto, ON**

Results: **Completed**

Costs: **750.00**

Entered By: **SARA 30/06/2023**

Comments: **Session 2 - scheduled for Sept/23**

General Comments

Unlimited comments for each employee can be recorded. In Personal Data, access an employee and select **General Comments** from the sidebar. The system will auto-fill the User ID, date and time the comment was entered and will show the current number of comment panels for this employee. The User ID, date and time will also be captured if these comments are changed. Comments can be printed at any time.

CTM1 General Comments

F2 Add Record F5 Print

Date: **30/06/2023**

Entered: **SARA 30/06/2023 10:24**

Changed:

First & Last Comment Dates: **11/11/2014 13/04/2023**

No. of Comments: **25**

This session's additions are not included in the counts and dates.

General

< Page Up > Page Down

First Pg F6 Last Pg F7

(2500 characters)

Comments can be setup to prevent future changes to the text via Security. Contact Parklane Support for details

Review Dates

Activities or follow-ups for an employee may be tracked under **Review Dates**. Pull pre-defined reviews by clicking **Standards F6** or click on **Add Activity**. Enter a date of the activity and tab to the User ID. The **User ID** will auto-fill based on the user currently logged into the system. The User responsible for completing the activity may be changed by clicking on the arrow at the top of the User ID column or by clicking the **Change User F9** button at the right of the panel. Tab to the **Activity** field and enter text instructions related to the activity. The **Done** checkbox will auto-fill a review date item, stamping it with today's date and the User ID of the user currently logged into the system.

	Date	User Id	SF1	Activity	Done	Details
1	09/01/2023	SARA		ELIGIBLE FOR DENTAL BENEFITS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2	13/01/2023	SARA		Letter, Demographic Check Letter	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	28/03/2023	SARA		call ee re dental ben	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4	29/03/2023	SARA		Letter, Benefit Eligibility Letter (Sara)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	14/08/2023	SARA		Send EE Recognition Letter	<input type="checkbox"/>	<input type="checkbox"/>

Buttons on the right: Standards F6, ReAssign F9, Date Sort F3, To Do F4, Show All F7, Overdue F8, Archive SF4, View Archived SF5.

The **See Details** checkbox will open a panel which allows the user to enter the **Action** taken for the Activity, and a **Completion Date**. Do NOT click the **Done** check box, the system will auto-fill.

Archive SF4 will place completed review dates in an accessible spreadsheet.

Several reports are available related to Personal Data Review Dates.

CC1F Activity Details

Target Date: 28/03/2023

User: SARA (SF1)

Activity: call ee re dental ben

Action: Completed on 13 Apr 23 by SARA ☒ Done

Completion Date: 13/04/2023

Close F12

Form Letters

To generate a form letter for an employee click on **Get Template** and select from the drop down list provided. The variables associated with the chosen template will auto-fill as the form letter is displayed. Text may be inserted or deleted throughout the letter is required. Doing so will not change the master form letter template content. Each letter may be a maximum of three pages in length.

Print the letter by clicking on **Print to PDF**. Once the PDF opens, all application features are available to the user. Clicking Print will send the letter to a default printer to create a paper copy.

Clicking **Link Doc** will store the letter for future reference on the Document Links panel of the record.

By entering a Reply Due Date and clicking on **Add Reminder**, the system will add an activity to the Review Date panel of the record.

When a form letter appears outdated, click **Reset Letter** to initialize the panel to the master form letter template content.

To send the letter, click **SF8 Email letter to**: This opens a panel in which the worker's email address will auto-fill, allow for the additional recipients and provide editable text indicating the Form Letter is an attachment to the email. Ten additional attachments may be sent with the letter by clicking attach File F9 or Doc Link SF9 and selecting a file from the browser or from the list of document links. A copy of the letter, a copy of the email and a copy of each additional attachment will be automatically added to Document Links. The emailed Form Letter, the Letter Attachment and all additional attachments will be recorded in the TMB Audit.

The screenshot displays the 'CC2F Form Letters' interface. At the top, there are five buttons: 'F5 Get Template', 'F5 Print PDF', 'SF5 Link Doc', 'F8 Add Reminder', and 'F7 Reset Letter'. The main area is a large text box containing a form letter template. The letter is dated 'Jun 30, 2023' and is addressed to 'Peter Abrahams' at '210 Angela Street, London, ON N4K 1R9'. The salutation is 'Dear Peter'. The body of the letter discusses dental benefits eligibility and provides contact information for Barbara A. Scott, Director of Benefits and Compensation. On the right side, there are fields for 'Letter No.' (2), 'Title' (Dental Ben Elig Letter), 'Reply Due' (with a calendar icon), and 'Last Printed' (with a calendar icon). At the bottom right, there is a button labeled 'SF8 Email letter to' with the email address 's.kane@parklanesys.com' below it. At the very bottom, there are three buttons: 'P1 F2', 'P2 F3', and 'P2 F4'. A small note at the bottom left states 'Any content changes will not affect the actual template.'

Module Usage

The Module Usage panel provides a read-only view of the modules in which the current employee has records.

CC1B Module Usage

This employee has records in:

- ☒ Personal Data Doc Links
- ☒ Recall, Tests taken & Doc links
- ☒ Incident Reporting
- ☒ Work Accommodation
- ☒ Disability Management
- ☒ Attendance
- ☒ Chart
- ☐ Lifestyle
- ☒ Simon

Date Record Added: 07 Nov 17

Last Changed: 19 May 21

Last Data Transfer:

Last User: KARENF

Previous Last Name:

Date Changed:

Previous Department: LTCH

Date Changed: 04 Apr 23

Previous Status: LOA

Date Changed: 07 Apr 22

Document Folder

The **Document Folder** feature allows the user to paste text documents or type notes for future review. (Text only, no pictures or images.) The maximum number of characters is 8,000 (equivalent to approximately two pages of a MS Word document). The format of the document may vary slightly from the original document. Once a document is entered, changes may be made until midnight and only by the original author. The **See List** button lists all documents in the Document Folder.

Access to the **Remove** function is controlled by Security.

CC21 Document Folder

F4 Add Record F2 See List F5 Print F7 Remove

Reference: Dental Eligibility Letter

Jun 30, 2023

Peter Abrahams
210 Angela Street
London, ON
N4K 1R9

Dear Peter

According to our records, you are now eligible for Company dental benefits. Enclosed is a brochure outlining benefits and limitations to this plan.

Our plan is administered by the Fabulous Life and Medical Insurance Co. A supply of dental forms has been enclosed for your convenience. A sample is provided to guide you through the form completion process.

We are pleased to provide you with this benefit. Should you have any questions, please contact a Benefits

Entered by:
SARA
30/06/2023
11:19

Document Links

The **Documents Links** feature allows the user to link and view electronic documents that are related to the employee.

Documents that can be linked include, but are not limited to:

- Documents (.doc, .pdf)
- Images (.jpg, .gif)
- Spreadsheets (.xls)
- Emails (.msg, .html)

In Personal Data, documents are linked directly to the employee. Move the cursor to the **Origin** column of the first blank line. Enter an **Origin** and **Description** of the document. The system will auto-fill the user and date entered. Click on **Link**. The Windows dialogue box will open and allow the selection of the document to be linked. A note will appear confirming the document was linked successfully.

To see a document, highlight the appropriate line and click **View**. The system will call up that document. Up to 800 documents may be linked to one employee.

Access to the **Remove** function is controlled by Security. Click **Remove** to delete link.

For details on Document Types, Scanning Documents, Location of Original Document, and other considerations, please refer to Parklane Support of the Special Features User Guide.

CTL1 Document Links F8 Sort Docs F5 Find a document No of Links: 89

No.	User	Date	Origin	Doc Date	Description
1	SARA	04/02/2014	Form Ltr		Benefit Eligibility Letter
2	SARA	24/02/2014	Form Ltr		Benefit Eligibility Letter
3	SARA	11/11/2014	HR		Diploma Req for File
4	SARA	11/11/2014	Form Ltr		Benefit Eligibility Letter
5	SARA	11/11/2014	HR		B-Day Email
6	SARA	19/02/2015	Form Ltr		Dental Ben Elig Letter
7	SARA	12/05/2015	Form Ltr		Dental Ben Elig Letter
8	SARA	18/11/2015	Form Ltr		Demographic Check Letter
9	SARA	02/12/2015	Form Ltr		Benefit Eligibility Letter
10	SARA	02/12/2015	EE		Replay Ltr re Benefits
11	SARA	15/03/2016	Form Ltr		Dental Ben Elig Letter
12	SARA	15/03/2016	HR		Email re Attendance
13	SARA	26/04/2016	Form Ltr		VPS sample ltr
14	SARA	26/04/2016	Form Ltr		Benefit Eligibility Letter

*Indicates no document was linked; x = Document may not be deleted.

Link F4

View F2

GoToBlank F9

FileName F3

Link url SF1

Go to Links:

001-100 F6

101-200 F7

201-300 SF3

301-400 SF4

401-500 SF5

501-600 SF6

601-700 SF8

701-800 SF9

SF7 Remove Link

Employee Labels

CC2R Demographic Labels

This task prints demographic information on labels. Two duplicate labels are printed.

Labels must be 4" wide and 2" high. Use labels that are "2 up" and have 10 labels on a page. (There's no space between each label).

To reduce waste: The system will ask you each time, which label number to print on. This number applies to the label in the left column.

Continue F5

Close F12

Dept: Fairmont PS - Custodial	DOB: 31 Oct 80
ABRAHAMS, PETER	Mar: Married
210 ANGELA STREET	Sex: Male
LONDON, ON	Con:
CANADA	
N4K 1R9	Dr.:
(519) 432-0087	
SIN: 112-345-678	HC#:
ID: 125	Pos: CUSTODIAN
Stat: Full-time	DOE: 01 Jan 03
	Date 26 Sep 18

Additional labels are available under the **Reports** dropdown in varying sizes and formats.

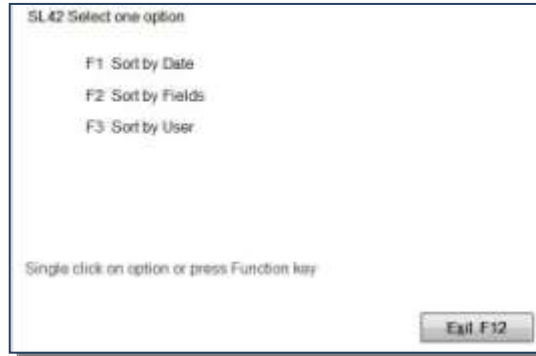
Employee Activity

Employee Activity produces an Excel spreadsheet listing of an employee's records from the Incident Reporting/WSIB Claims Management, Disability Claims Management and Work Accommodation modules based on the variable and date selections.



TMB Audit Report

The TMB Audit Report provides several options to sort and generate audit reports related to entered data.



User Notes & Email

The User Notes & Email panel provides three features:

- A Note area to enter text, which will globally pop-up in any module opened for the specific employee. The system will auto-fill the original user name and date entered, along with user name and date of most recent edit. A date field is also provided to automatically remove the note if time sensitive.
- **F2 Open mailto to send email to this employee** wherein an email will open applying the employee email address from Personal Data. If no email address exists in Personal Data for the employee, a completely blank email will open. Proceed by entering Subject and the email text.
- **F3 Open mailto to send email to another user** wherein the list of Parklane Users will appear at which point clicking on a name will open applying the users email address from Security. When using either email option, a copy of the email will be added to your Email Program's sent folder.

CTL9 User Notes & Email

These notes will be shown to a user when they access this employee anywhere in the system. They are available to only those who have access to this panel.

a) Notes

b) Enter date if these notes are to be removed automatically

Entered by

Date

Edited by

Date

Employee's Email: s.kane@parklanesys.com

F2 > Send email to this employee

F3 > Send email to another user

Copy of email will be added to your Email Program's Sent folder

Security controls which users will see the note when accessing this employee or their records.

Demographics

The **Demographics** panel provides a read-only pop-up of the employee's general demographic information. The Demographics panel is available in various module records for easy reference. **Security** controls which users will have access to the Demographics pop-up on module by module basis.

CT35 Demographics	
Surname AFFLECK	Department TES Parking - Meters
Given Name BEN	Employee Id. N170
Address 155 NUT ROAD	Status Full-time
City, Prov.State BURLINGTON ONTARIO	Position PARKING METERS
Country CANADA	Hire Date 01/02/2012
Postal/Zip Code G1X5C3	Union UNION A
Home Phone 416 222-9688	Supervisor FERRELL, KAREN JOAN
Business Phone 519 657-3386 2240	SUPPORT
Cell, Foreign 416 222-6632	
Birth Date 10/10/1964	Daily Hours 8:00
Age 60	Weekly Hours 40:00
Sex Male	Work Hours 8:00 to 17:00
Marital Status Married	Miscellaneous MISC 1 FIELD
Language ENGLISH	Key 170
Business Email k.ferrell@parklanesys.com	
Personal Email	

In A Nutshell

The **In a Nutshell** panel provides the user with a one-page overview of an employee's current records from various modules. The modules included are Incident Reporting, Disability Management, Work Accommodation, Attendance Management and Chart.

Depending on the user's **Security** access, checkboxes provide access to more detailed record information. The "R" checkbox opens the actual record and the "C" checkbox opens the General Comments related to the record. In the case of Incident Reporting, Disability Management, Work Accommodation we can see the most recent five records. Attendance Management will show the most recent twenty-five records, as well as an indicator and date if the employee is in an Attendance Case Management Program. The date of the last Health Centre visit is provided from the Chart module.

CTLA Employee Records in a Nutshell

Click check box under *R to access actual record
Click check box under *C to view general comments

Incident Reporting Last 5 recorded incidents showing (excludes hazards)

Inc. Date	Class	Expect Rtw	Rtw Date	ModDuty Dt	Department	Injury	Status	Days	*C	*R
10/11/2023	FA				FXH		Per		<input type="checkbox"/>	<input type="checkbox"/>
16/10/2023	LT				FXH		Per		<input type="checkbox"/>	<input type="checkbox"/>

Disability Management No claims recorded

First Day Off	Type	Expect Rtw	Rtw Date	ModDuty&Dt	Department	Description	Days

Work Accommodation Last 5 recorded programs showing

Start Date	Occ?	Est. Stop	Est. Term	Completion	Act. Term	Department	Result
01/12/2023						FXH	
04/09/2023		13/11/2023	10 Weeks			FXH	

k) Attendance Last 25 time records showing

Date	Day	Department	Type	Hours	Cont.
17/11/2023	Fri	FXH	Sick	8:00	C
16/11/2023	Thu	FXH	Sick	8:00	C
15/11/2023	Wed	FXH	Sick	8:00	C
14/11/2023	Tue	FXH	Sick	8:00	C

l) Date of Last Health Center Visit 02/08/2023 ☐

In Case Management Program? Yes

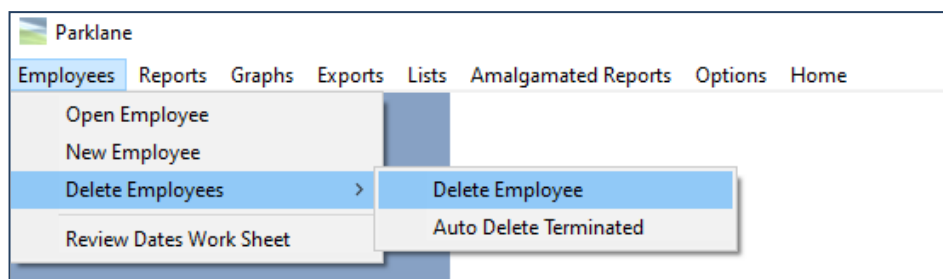
Delete Employee(s)

The function **Delete Employees** allows the user to delete one or more employees or to automatically delete terminated employees.

To delete an employee record, use **Employees/Delete Employees**.

Employees who have records in various modules will not be deleted.

If you attempt to delete an employee who has any of these types of records, you will be warned accordingly and your request to delete will be denied.



You can delete one or more employees at a time or have your system delete all employees who were terminated prior to a specific date. Using this option, employees with the above mentioned records will not be deleted.

Review Dates Work Sheet

The **Review Dates Worksheet** provides immediate access to the currently signed in user's review dates in this specific module.

	Date	Overdue Name	Activity	a) Done	View	Record	Re-Assign
1	18/12/2023	<input type="checkbox"/>	AFFLECK, BEN	call worker - forms completed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The view from the module **Menu** panel are your review dates for all employees from this module which are overdue for up to three months prior. Alternative views are listed on the right side of the panel along with fields to enter specific date parameters or specific due dates.

The **Done** check box will auto-fill a review date, stamping it with today's date and the User ID of the user currently logged into the system.

The **View** check box will open a subsequent panel which allows the user to enter text related to the **Action** taken related to the activity, and enter a **Completion Date** for the Action. Do NOT click on the Done check box here, the system will auto-fill.

The **Get Record** check box will open the record associated with the review for the user to add, review or revise information on the panels specific to the record.

The **Reassign** check box, in conjunction with the **Assign F9** or the **Reassign All F14**, will allow the user to assign the review dates to another user one-by-one or on masse.

See the **C3A Review Dates** report for an alternative method to access review dates for one or more users. The C3A Review Date report may be accessed from the sidebar or from the **Reports** dropdown menu.

Reports Available In Personal Data

Reports

Attributes

- C78 Select Attributes
- C7C** One Attribute
- C2J Attribute Totals

Skills Set

- C65 Selected Skills
- C68 Employee Skills
- C67 Skills Totals
- C66** Export Skills

Labels

- C2P Labels 2 up (4" x 1" – 20/pg.)
- C2S Labels 3 up (2.75" x 1" – 30/pg.)

- C3A Review Dates

- C2G Form Letters

- C19 Employee Changes**

Graphs

- CHA Employee Statistics
- CHB Experience Report
- CHC Activity Dashboard

Exports

- CHC Activity Dashboard
- CHE Export Open Claims/Programs
- CHF Export Who's Off
- TM9 Time Markers

Lists

- C35 By Group or Department
- C3G Alphabetical List
- C3H By Surname
- C39 List by Union
- C3K Terminated Employees
- C3L Maternity or LOA
- C3I Employment or Birth Date
- C33 Missing Fields
- C34 By Age Group
- C2M Potential Duplicates

- C2T Potential Duplicates Export

- C2N Miscellaneous Fields

- C3S Report of Comments

- C32 Deleted Employee Records

- C36** Home or Email Addresses

- C37 User Notes

- C38 Those in Multiple Sites

- C56 List of Badges/Card Numbers

Amalgamated Reports

- C3E Employee Profile

- C3F Employee Chronology

- C51 Dept/Group Summary

- C52 Employee Totals

- C53 Dept/Group Costs

- C54 Employee Costs

Options

Departments & Groups

- C2B** List or Export Departments

- C45** List Departments in

Groups

- C4D List Obsolete Departments

- C3J Records/w Bad

Departments

- C74 Print Hours Worked

Attribute Tables

- C76 Attribute Descriptions

- C2V Module Attribute Totals

- C7P** Export Attribute Table

Skill Sets Table

- C60 Skill Set Definitions

- C3R Temporary Staff Reassigns

- C3M Hidden employees

- C3V Employees Added Between Dates

- C2L Departments Added in Date Range

- CMD Audit Report

- CMC Audit Export

- C4M Import Skills Set

** Option to Create Export File in Addition to Report.

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519.657.3386
ContactUs@parklanesys.com

Access the Parklane web site for more details about Parklane products

www.parklanesys.com