Personal Data Module

User Guide – V 12.0

December 17, 2024

PARKLANE SYSTEMS

Table of Contents

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

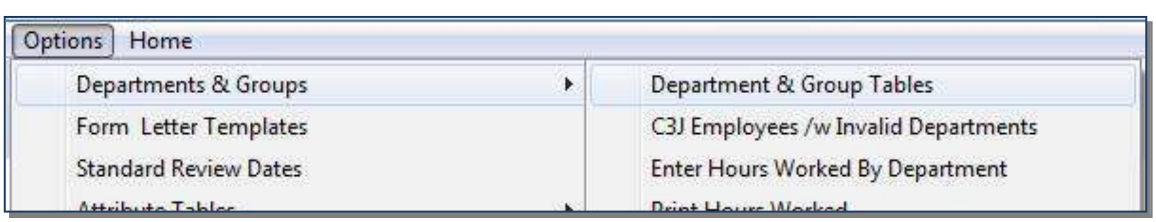
Before you use the system, it must be populated with your organization's employees. There are two fields that must be completed to have valid employee records – Department and Surname. If you manually enter employee demographic data and plan to run a Data Transfer in the future, make sure that the Social 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.

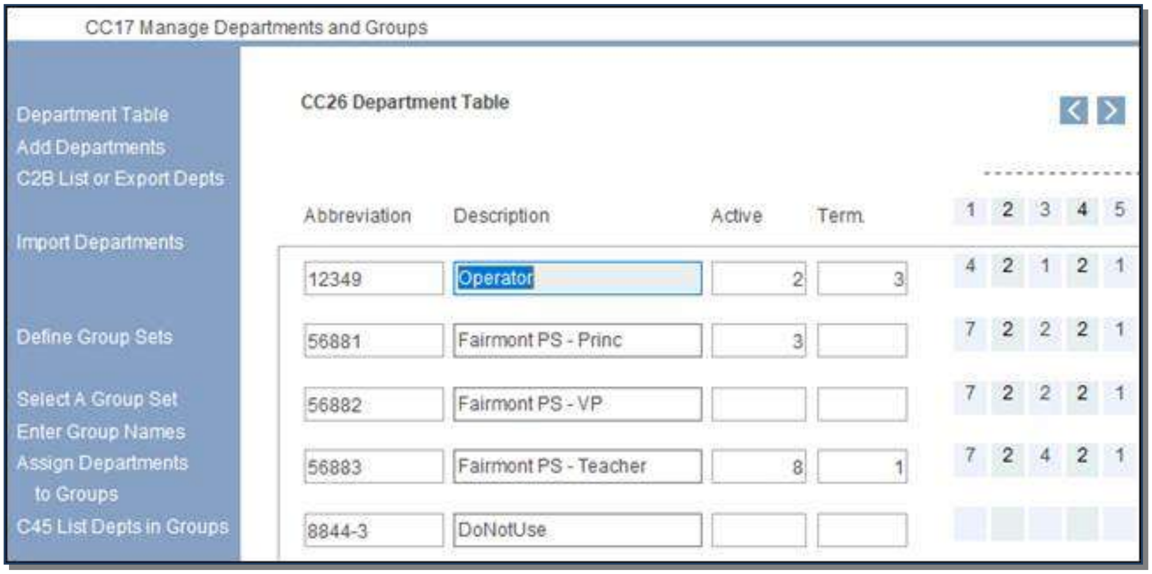
If no Data Transfer of employee demographic information is being generated, all department additions will need to be entered manually.

Departments & Group Tables

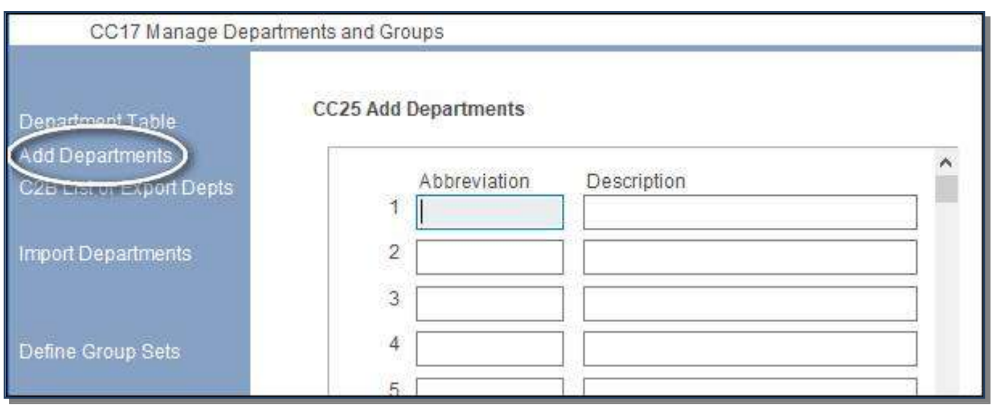
- In Personal Data click on **Options/Departments & Groups/Department & Group Tables**.



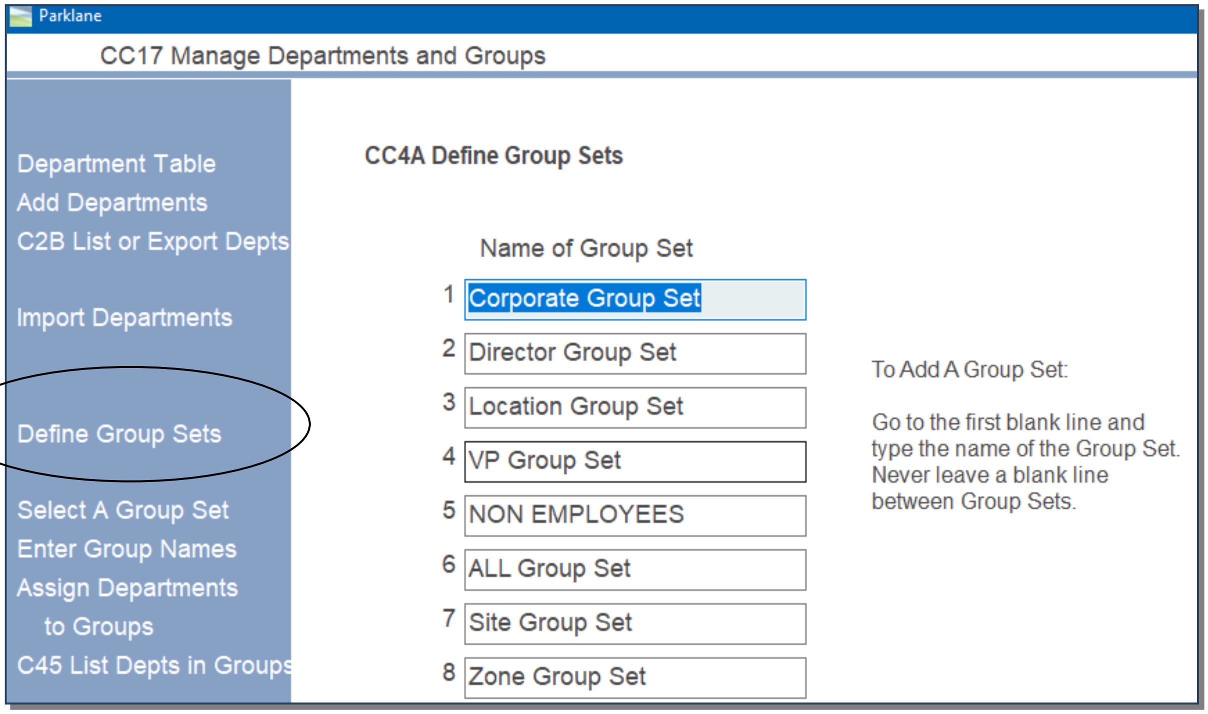
The Department Panel notes the current number of Active and Terminated employees in each department, and if setup, also shows the Group Set and Group Assignment for each department.



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.



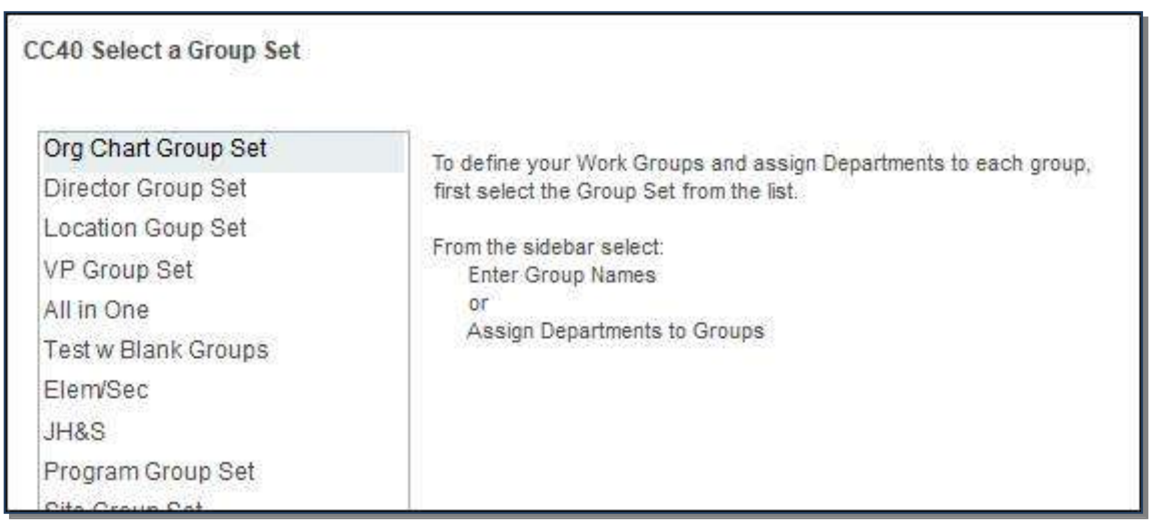
A hierarchy of reporting structure can be developed using Group Sets. A maximum of 15 Groups Sets may be defined. In Personal Data click on **Options/ Departments & Groups/Department & Group Tables.** Choose **Define Group Sets** from the Sidebar menu to add the Group Set name.



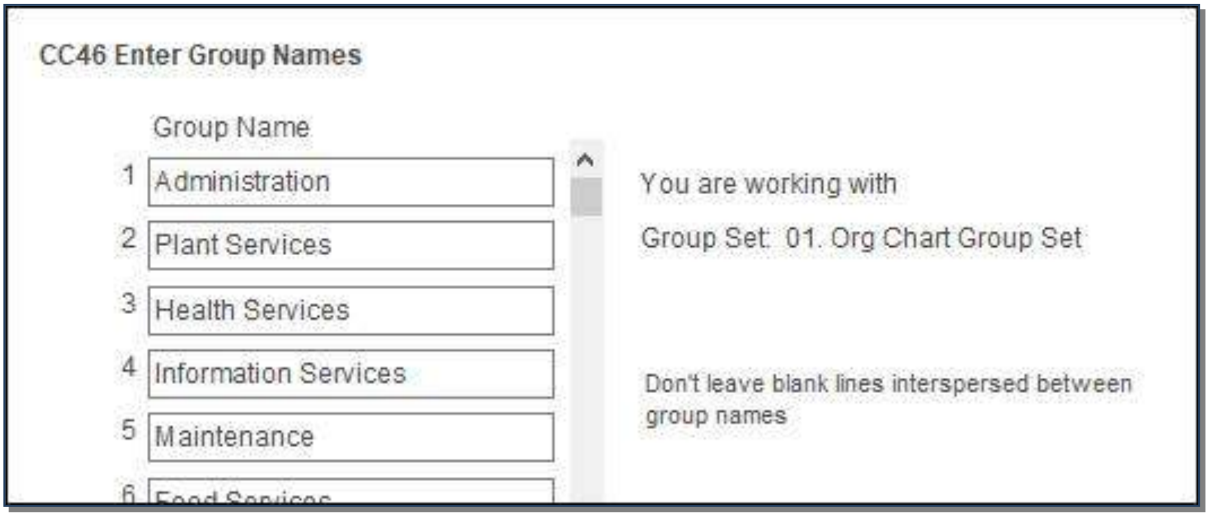
Click on the next available field and enter the name of the Group Set.

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.

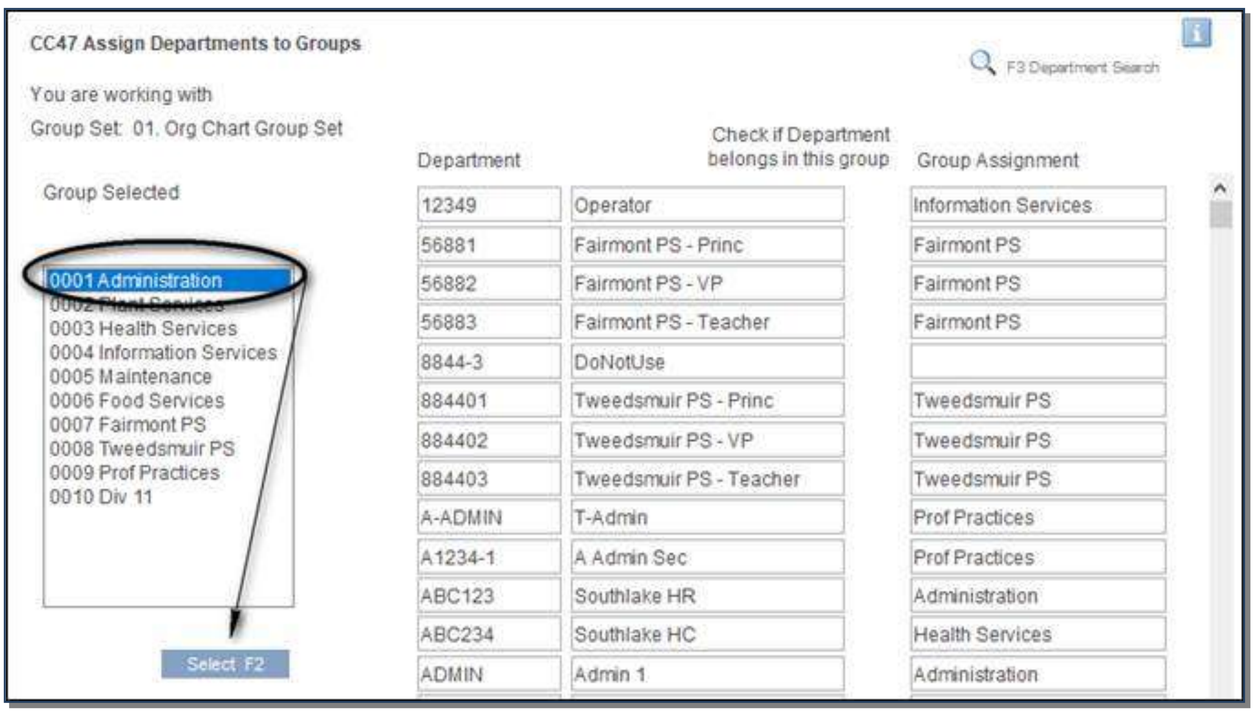


On the Sidebar menu select **Enter Group Names**.



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.**



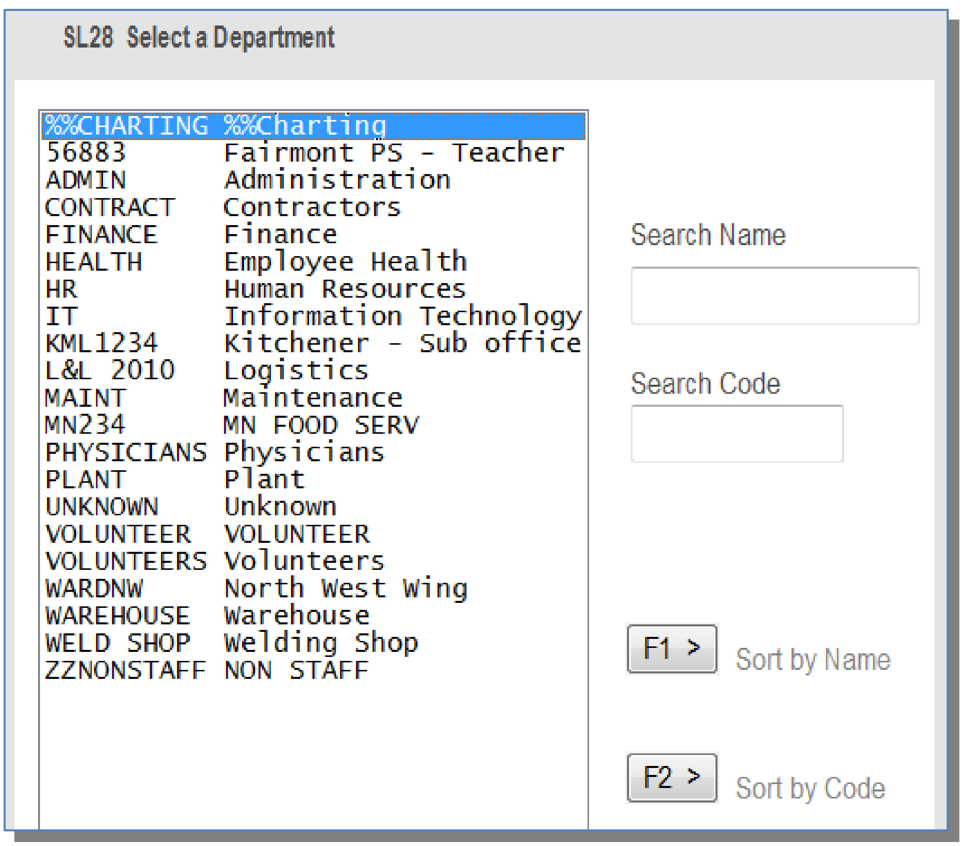
Check boxes will appear next to unassigned departments. In the example above, the group “Administration” was chosen. Check the boxes corresponding with the departments belonging to Administration.

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

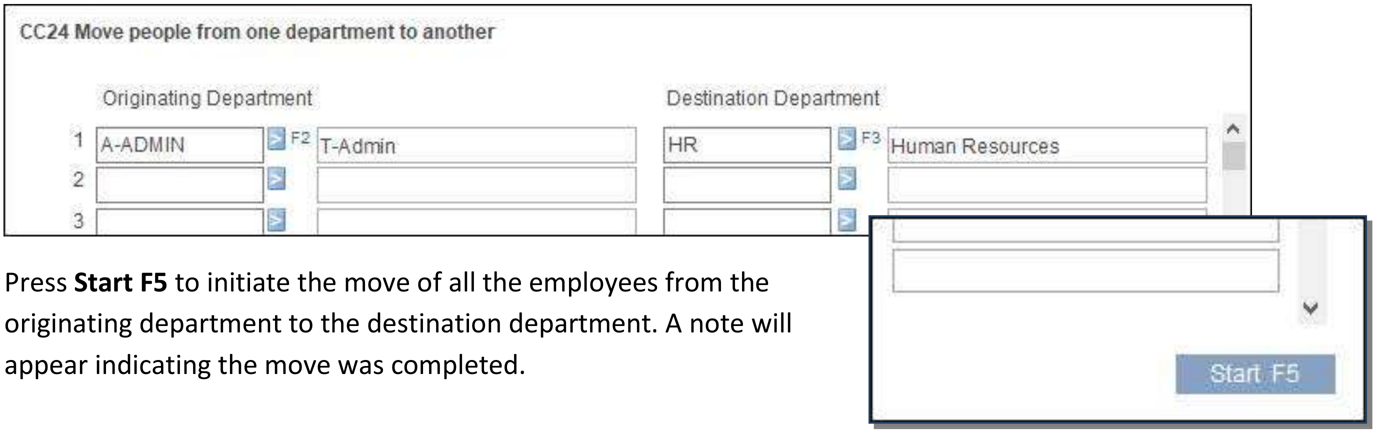
Move Employees

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.



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.

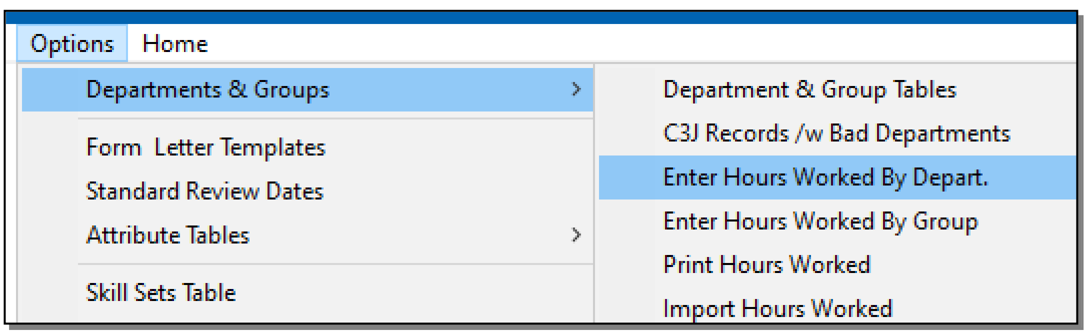


Press **Start F5** to initiate the move of all the employees from the originating department to the destination department. A note will appear indicating the move was completed.

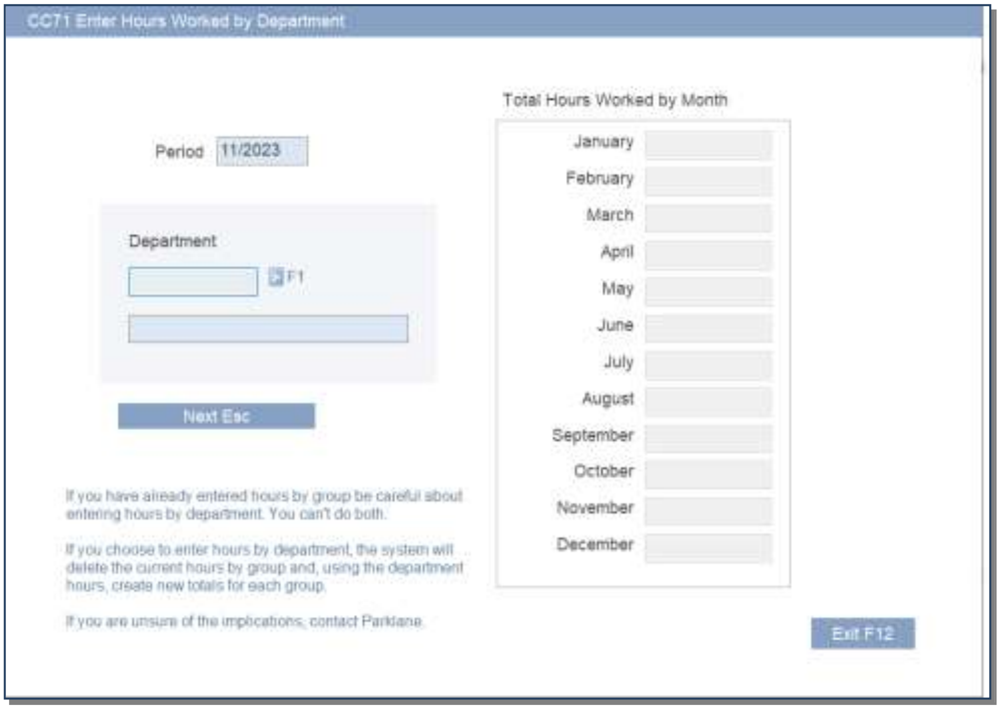
Remove Obsolete Departments

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



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.**



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.
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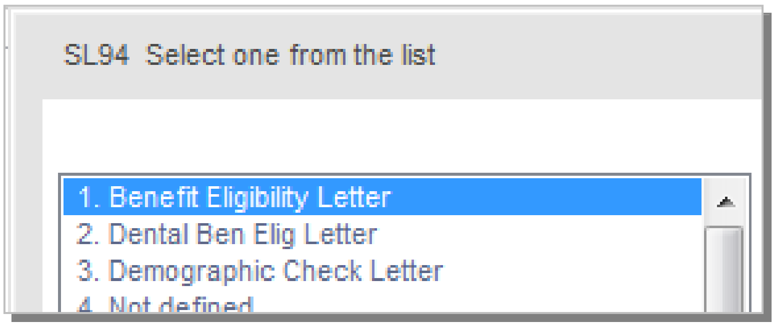
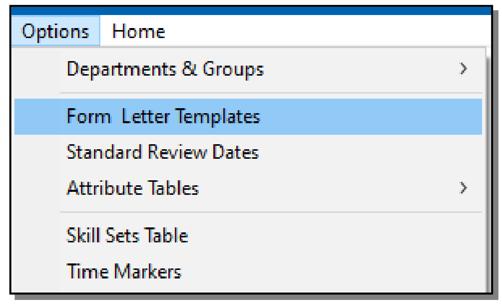
Form Letter Templates

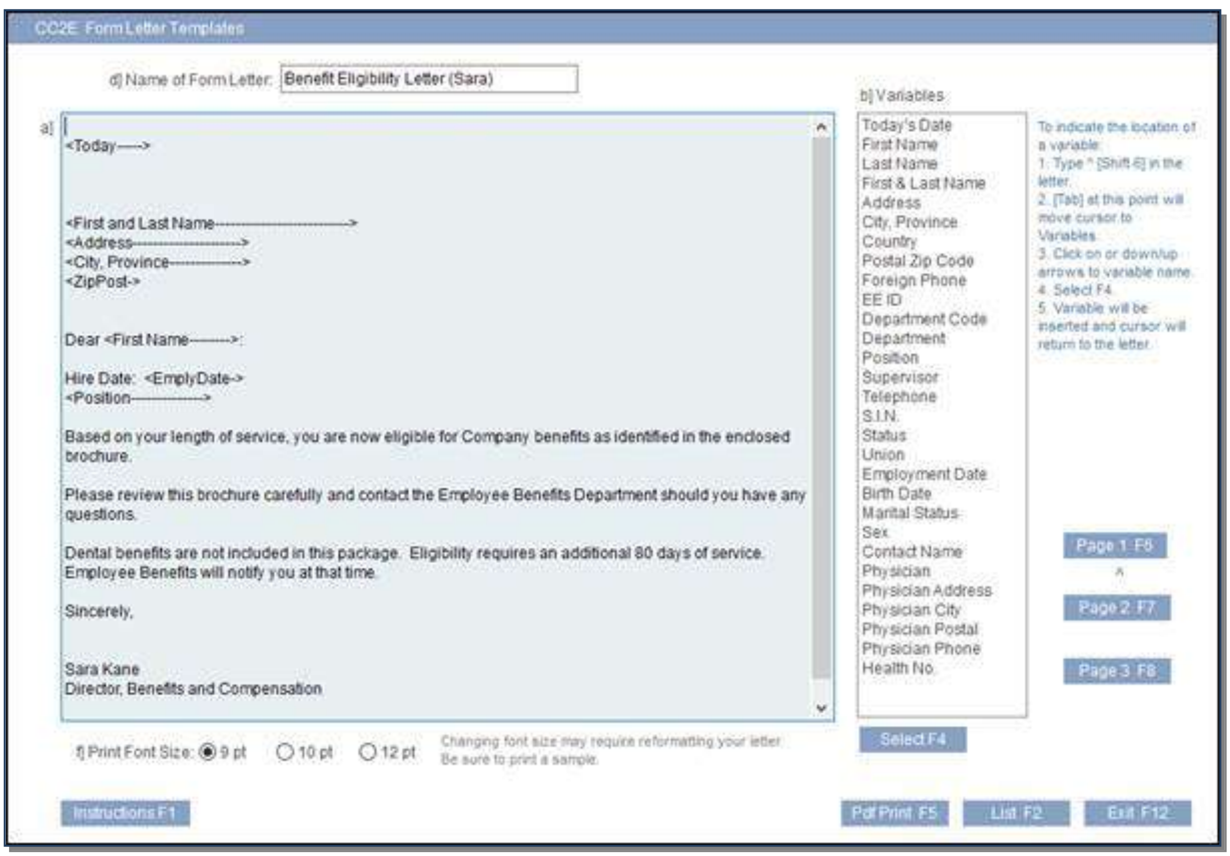
Form Letters can be used to send notices or letters to your employees. To create up to 100 templates, click on **Options/Form Letter Templates**

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.



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

PARKLANE SYSTEMS

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 produced 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

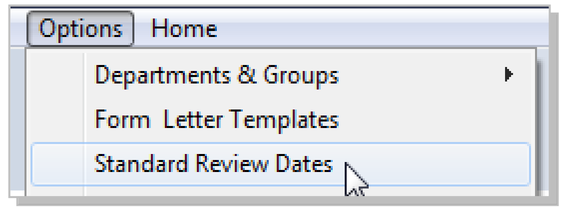
Template

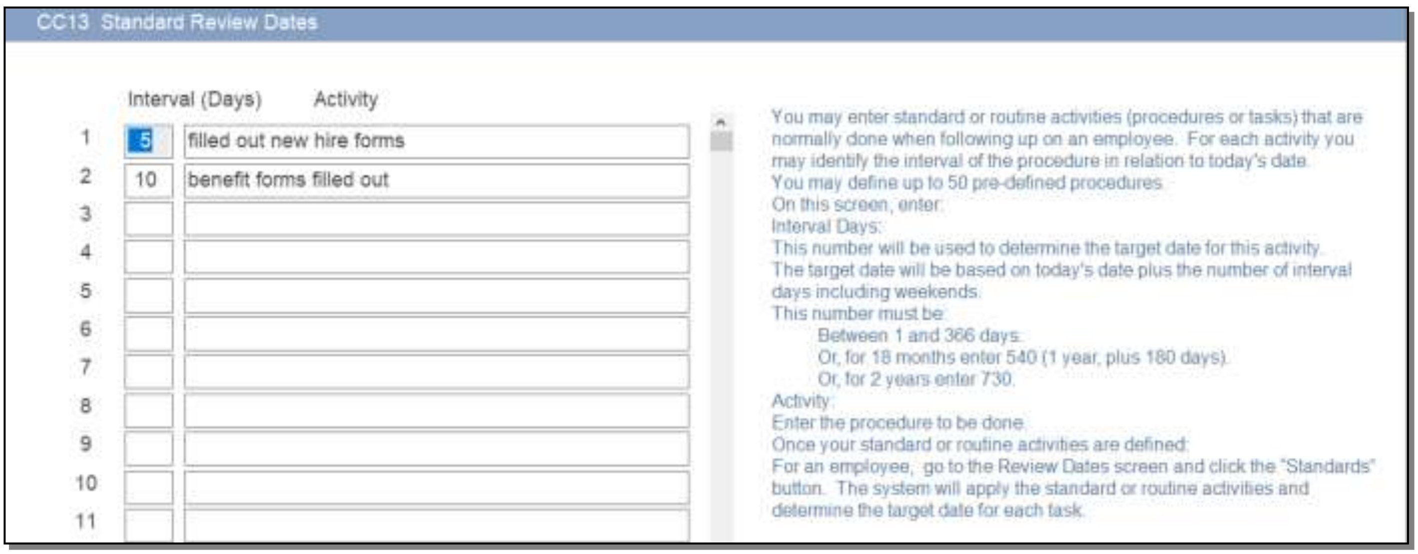
Select a template from the list.

- 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

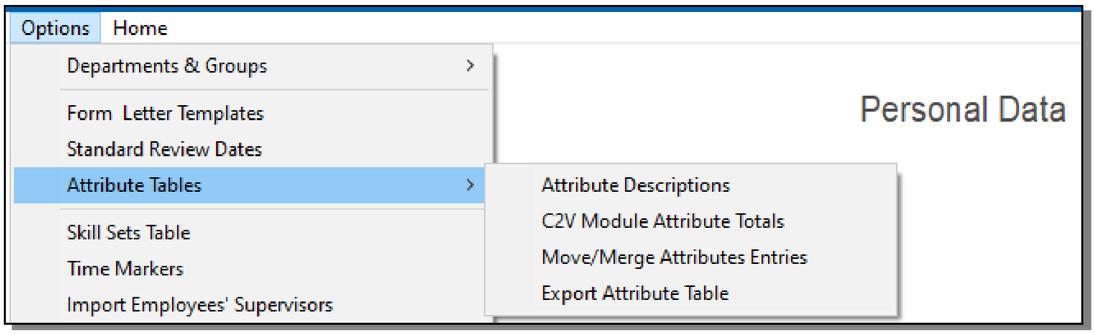
- **Standard Review Dates**, or global reviews, for your organization can be defined under **Options/Standard Review Dates**. Read the panel instructions for details.



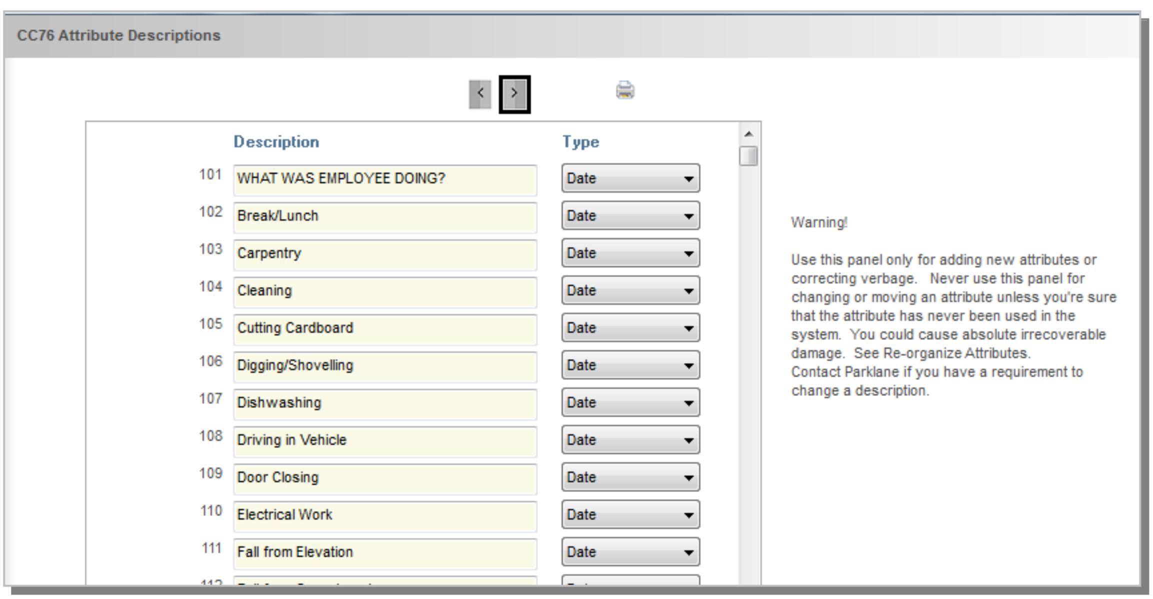


Attribute Tables

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



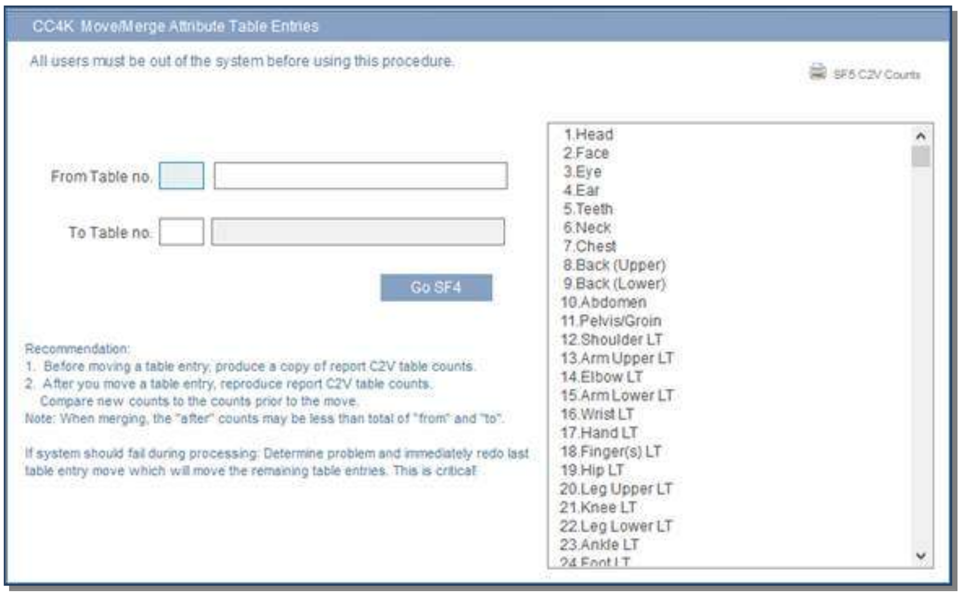
The Attribute Table can be exported to a text file by selecting the **Export Table** feature on the drop down menu of **Options/Export Table**.

Move/Merge Attribute Entries

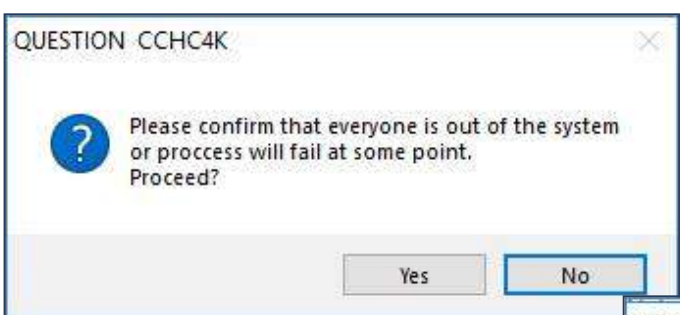
The Move/Merge Attribute Entries feature provides functionality to move or merge Attribute descriptions and all associated system data from one number to another. Print the C2V Counts report before proceeding.

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

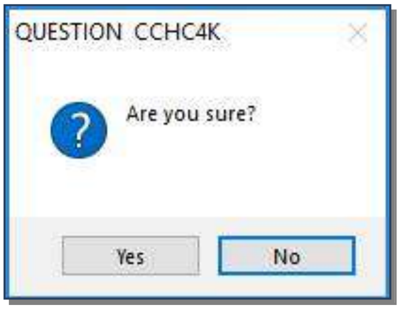
Enter the attribute number you want to move/merge in the **From Table no.** field and press Tab. Enter the number you want the attribute to move to or merge into in the **To Table no**. Enter or revise the attribute Description if needed. Select **Go SF4** to proceed with the move/merge.

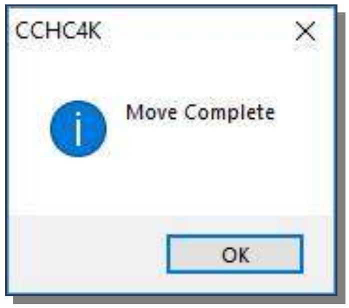


A question box will appear asking you to confirm that all users are out of the system. If all users are not out of the system, the process may fail.



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.

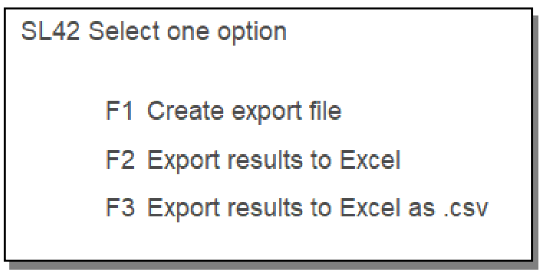


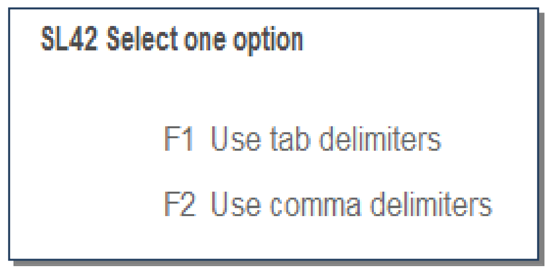


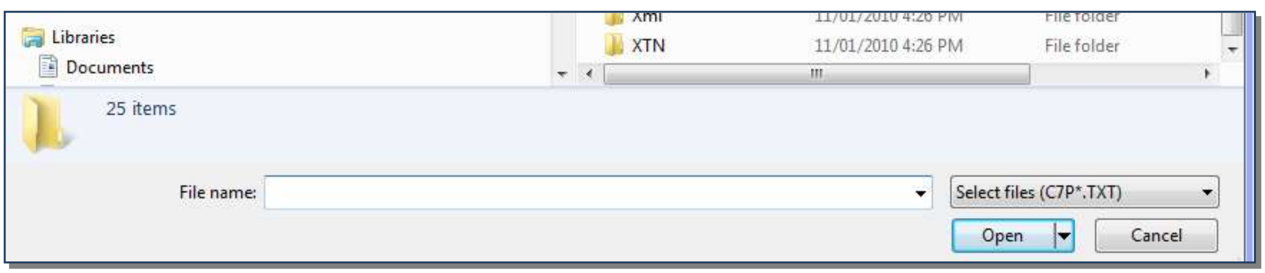
Print the C2V Counts report and compare with the initial report run prior to running this process.

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.



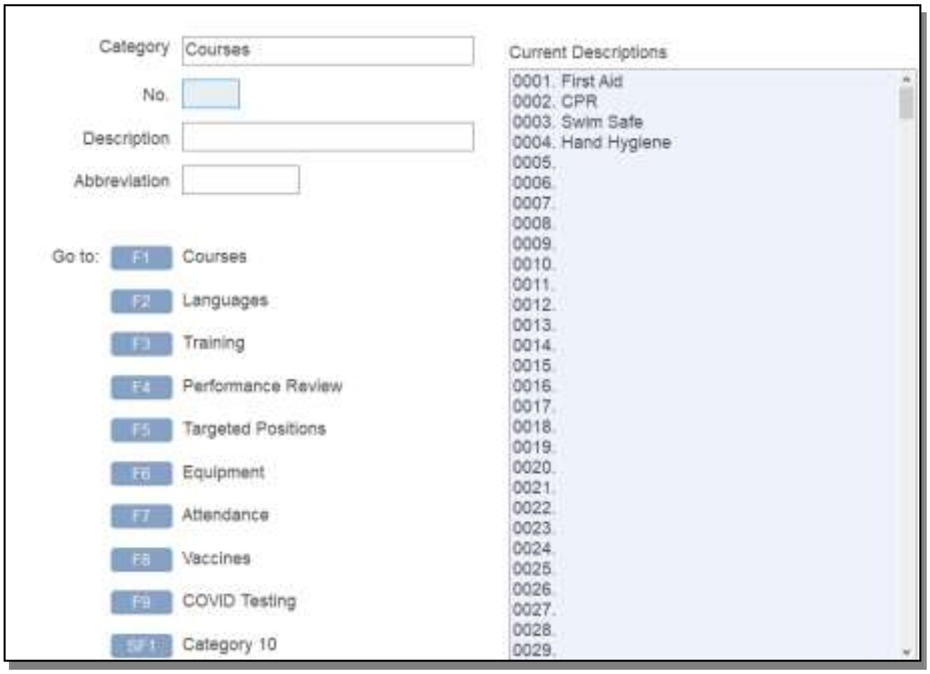




Skill Sets Table

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.



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.

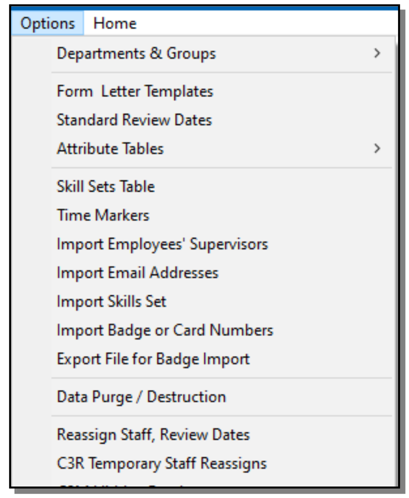
Import Email Addresses

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

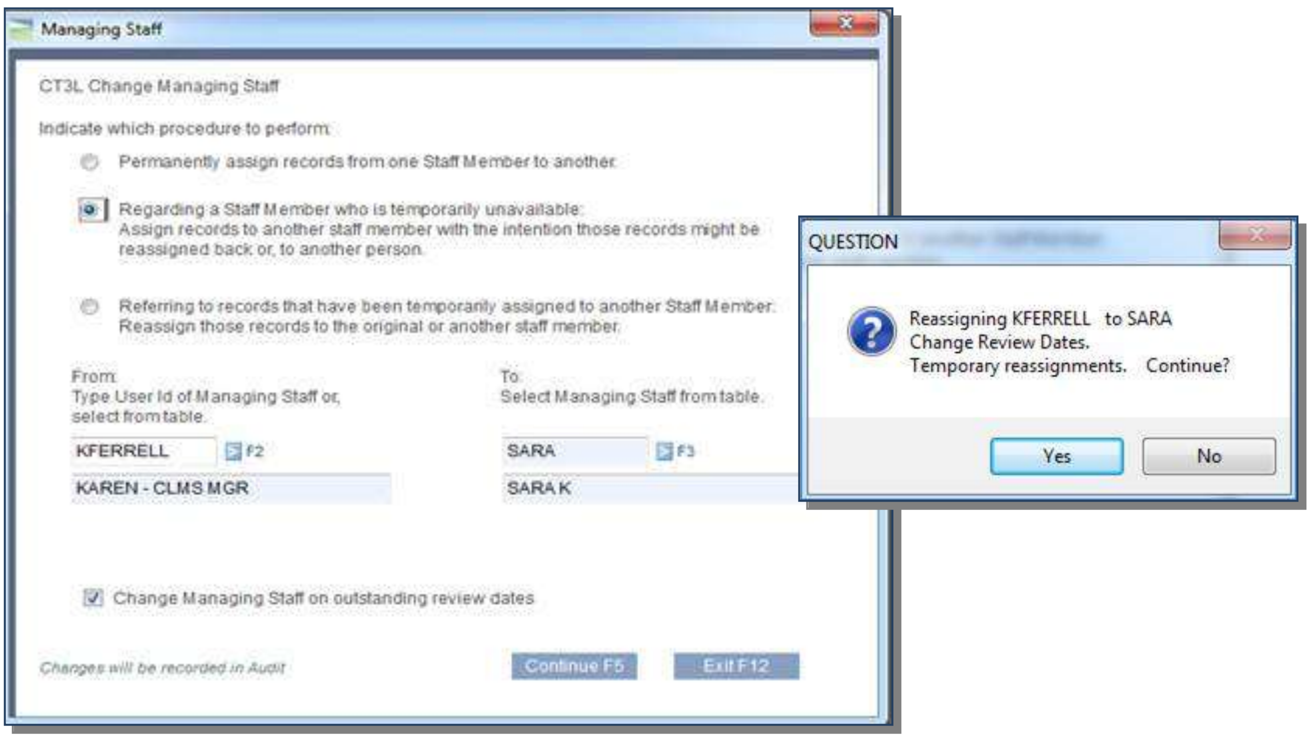
An import file can be built which will provide alternative access to an employee through the Parklane SIMON or KICS products by swiping a card with a bar code or magnetic strip. For instructions and the record layout to create this file click on **Options/Import Badge or Card Numbers/F3 View record definition**.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

Reassign Staff, Review Dates

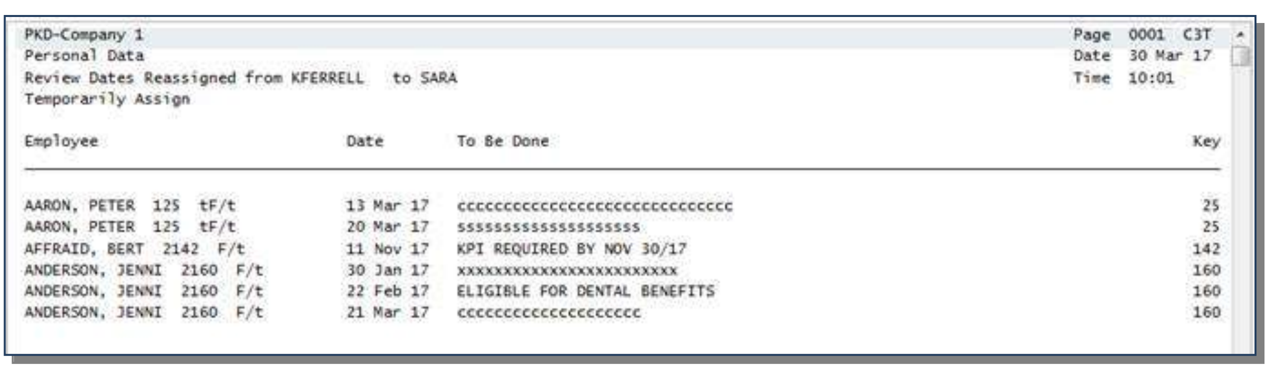


As staff depart, vacation, take leave, or changes in user caseload are necessary, this utility provides the ability to permanently or temporarily change the Managing Staff field for all outstanding Review Date records from one User ID to another. In the case of a temporary reassignment, the records can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



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

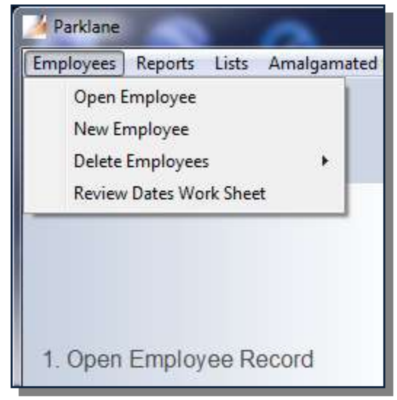


PKD-Company 1 — Page 0001 C3T
Personal Data — Date 30 Mar 17
Review Dates Reassigned from KFERRELL to SARA — Time 10:01
Temporarily Assign

Employee	Date	To Be Done	Key
AARON, PETER 125 tF/t	13 Mar 17	cccccccccccccccccccccccccccccc	25
AARON, PETER 125 tF/t	20 Mar 17	ssssssssssssssssssss	25
AFFRAID, BERT 2142 F/t	11 Nov 17	KPI REQUIRED BY NOV 30/17	142
ANDERSON, JENNI 2160 F/t	30 Jan 17	xxxxxxxxxxxxxxxxxxxxxxxx	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

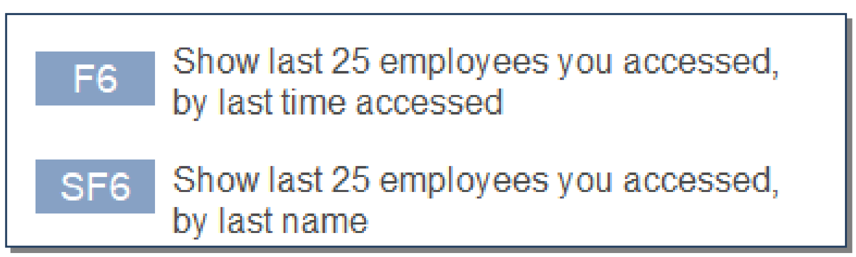
Open/New Employees



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

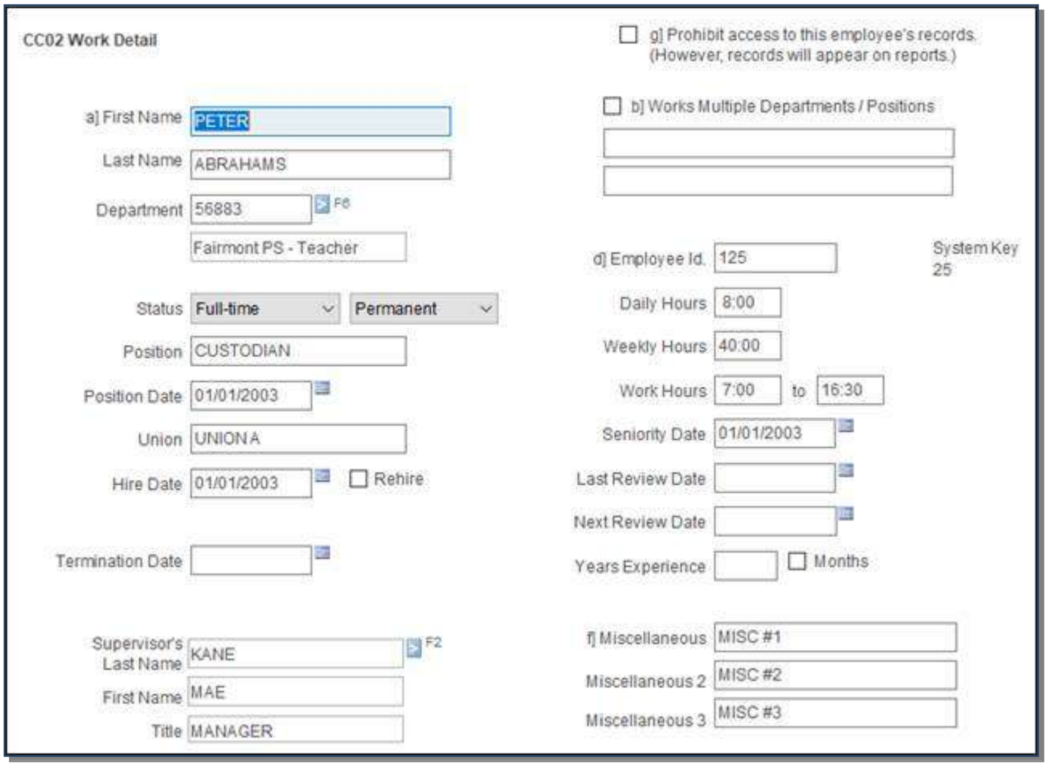


Employee Records consists of several panels of information.

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.

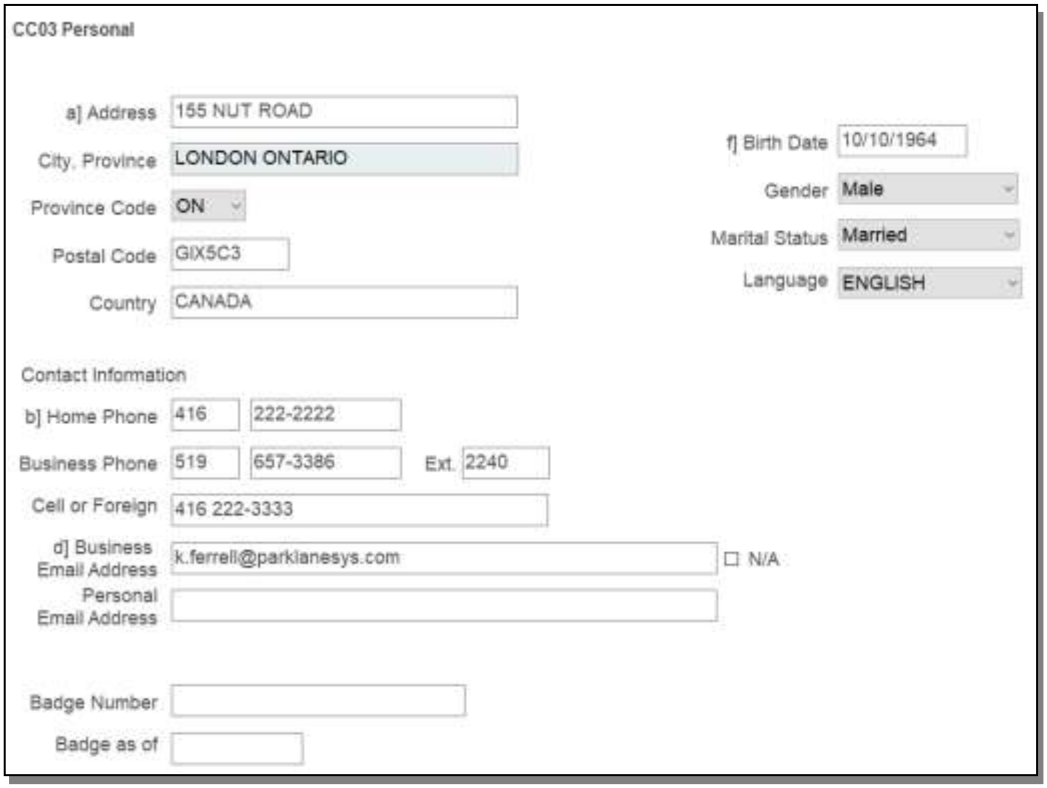
Alternatively you can use the control functions noted on the bottom of the panel to move from one panel to another.

Work Detail



SIN, SSN & Salary

Personal



CC03 Personal

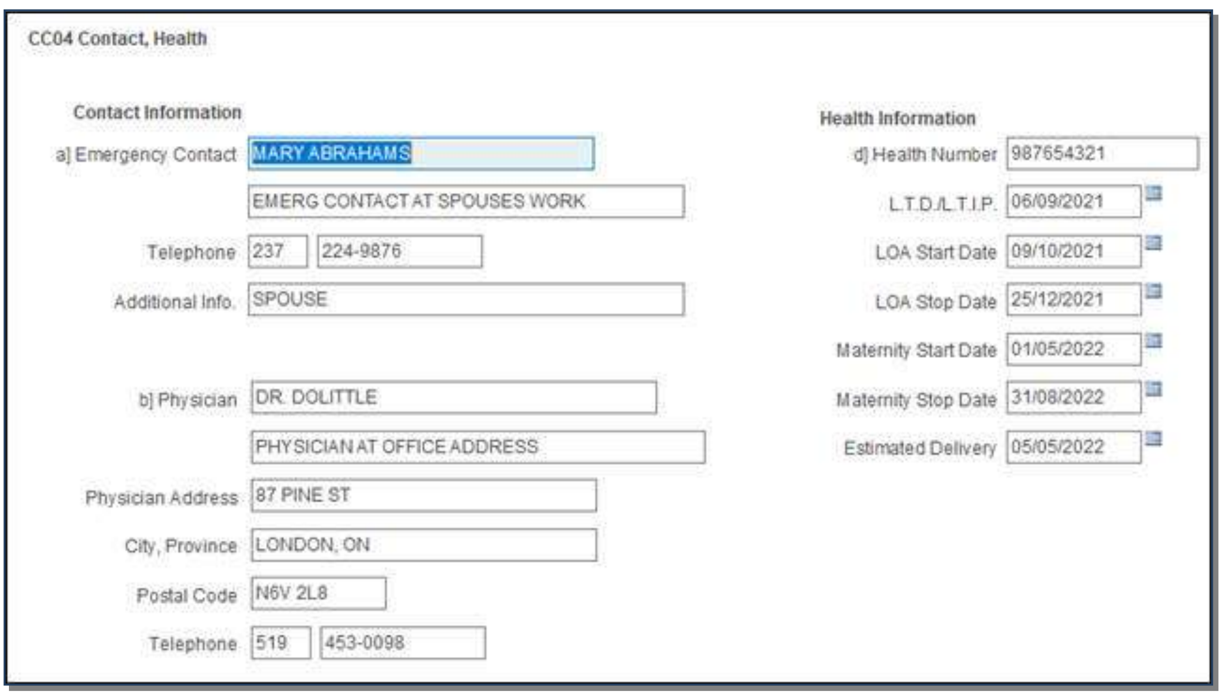
a] Address: 155 NUT ROAD
City, Province: LONDON ONTARIO
Province Code: ON
Postal Code: GIX5C3
Country: CANADA

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@parklanesys.com ☐ N/A
Personal Email Address:

Badge Number:
Badge as of:

Contact, Health



CC04 Contact, Health

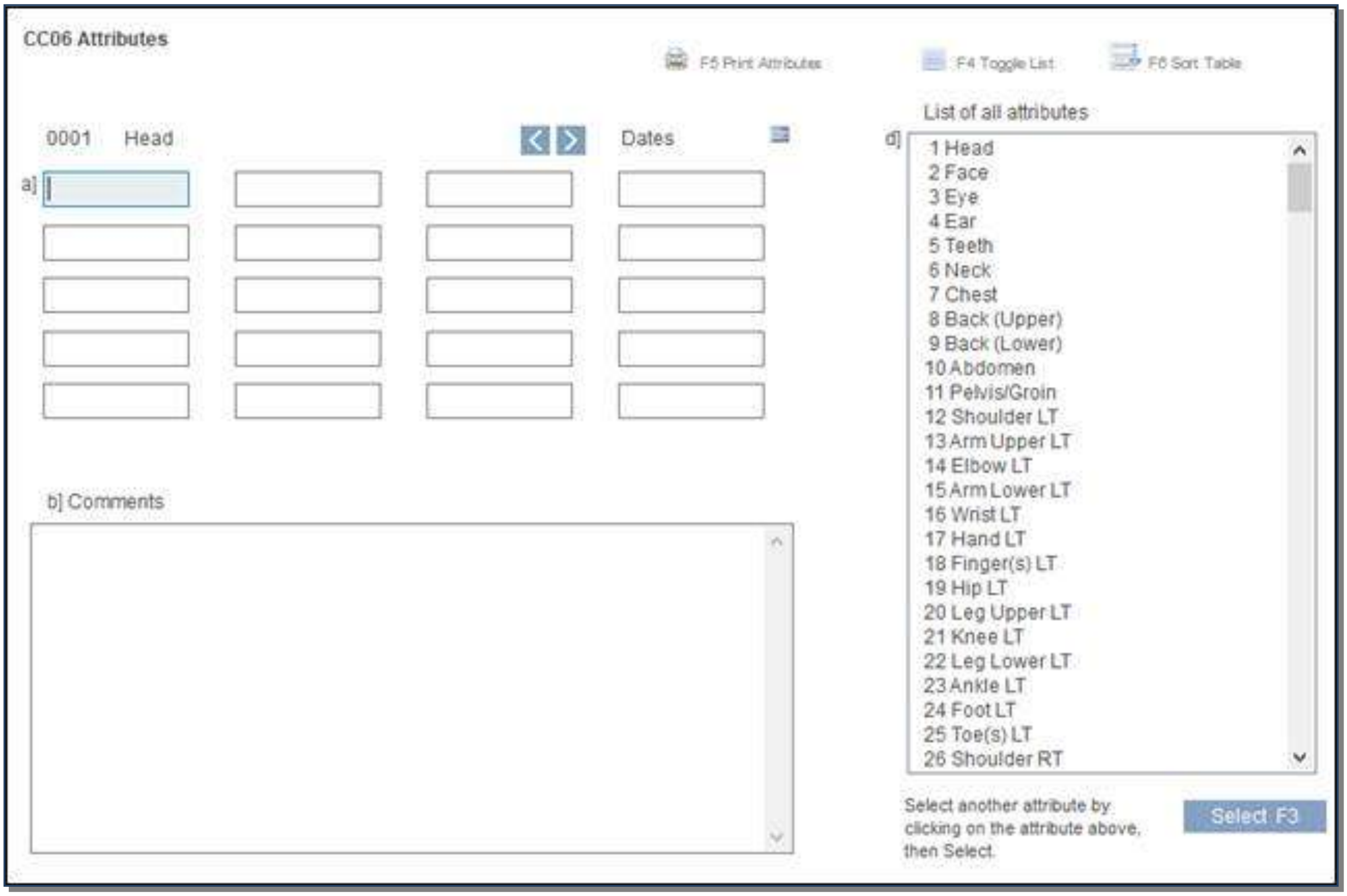
Contact Information
a] Emergency Contact: MARY ABRAHAMS
EMERG CONTACT AT SPOUSES WORK
Telephone: 237 224-9876
Additional Info.: SPOUSE

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.I.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

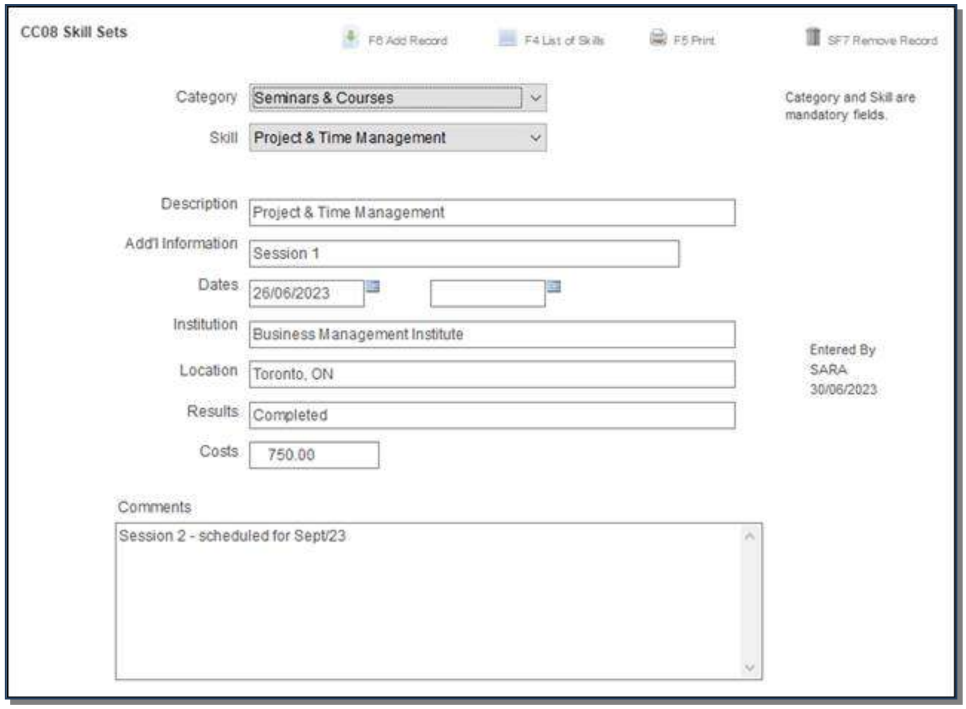
Attributes

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.



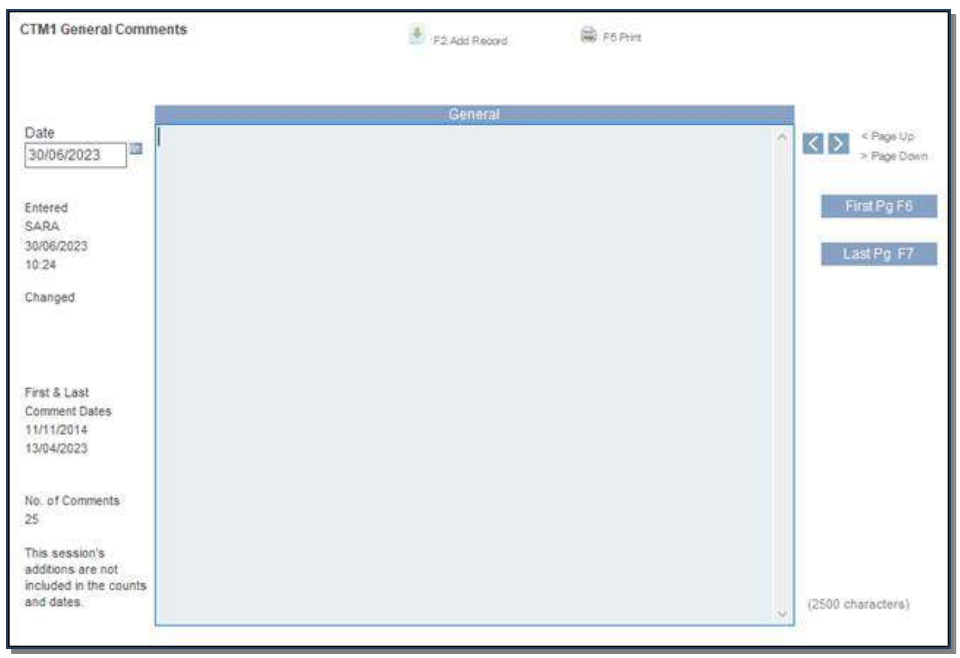
Skill Sets

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.



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 anytime.



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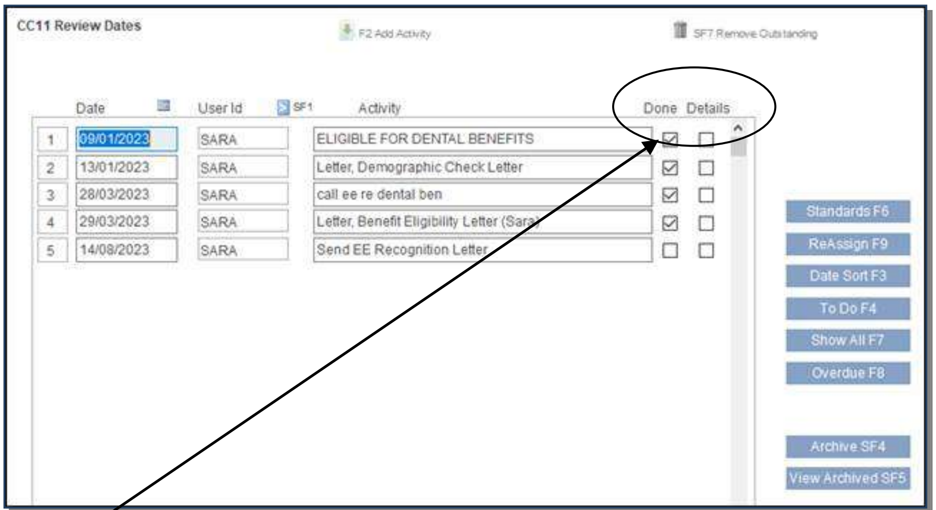
Comments can be setup to prevent future changes to the text via Security. Contact Parklane Support for details

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.



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.

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.

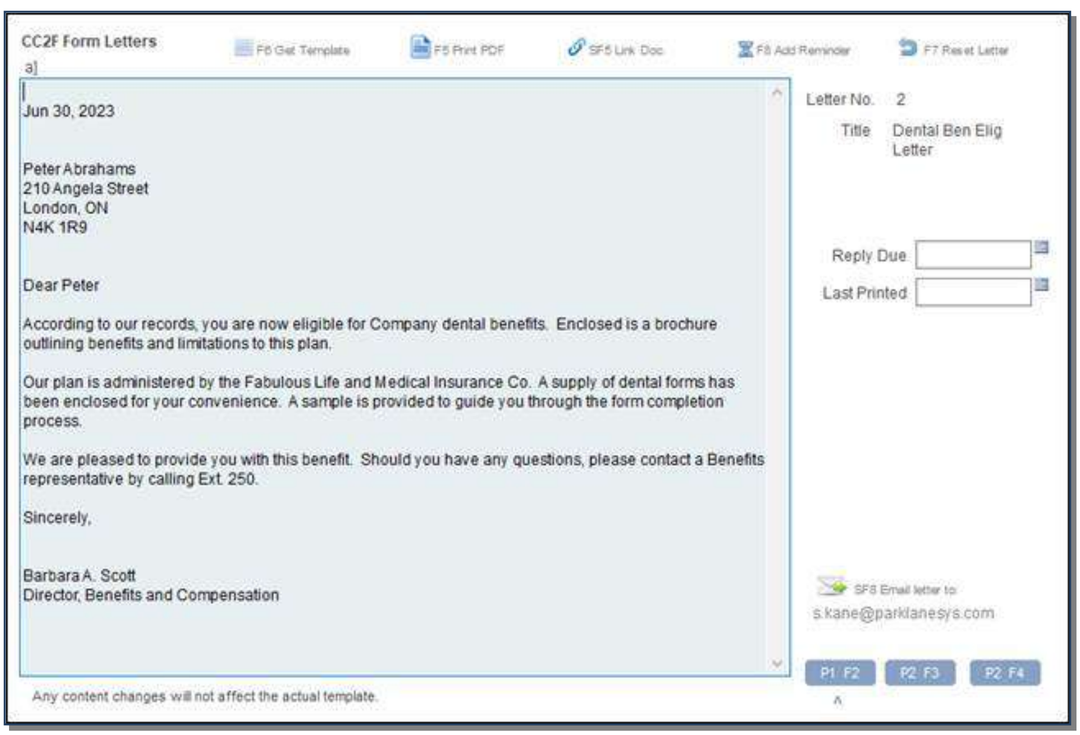
Print the letter by clicking on **Print to PDF**. Once the PDF opens, all application features are available to the user. Clicking Print will send the letter to a default printer to create a paper copy.

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.

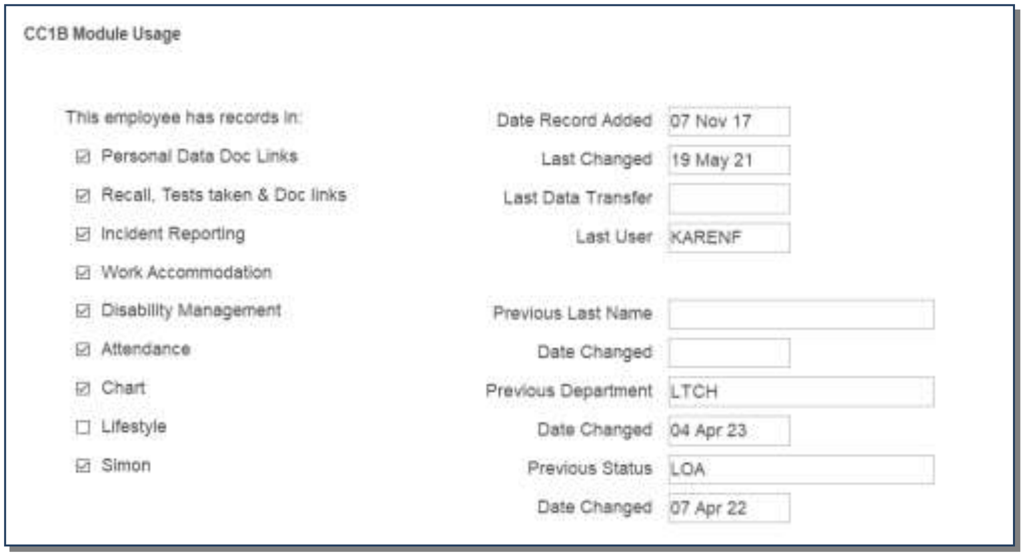
When a form letter appears outdated, click **Reset Letter** to initialize the panel to the master form letter template content.

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.



Module Usage

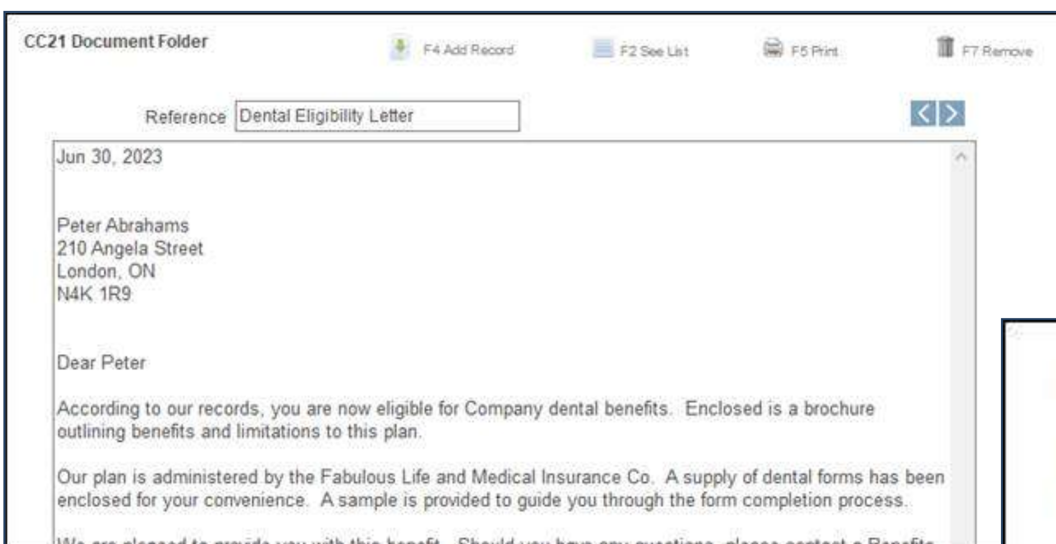
The Module Usage panel provides a read-only view of the modules in which the current employee has records.



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.



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:

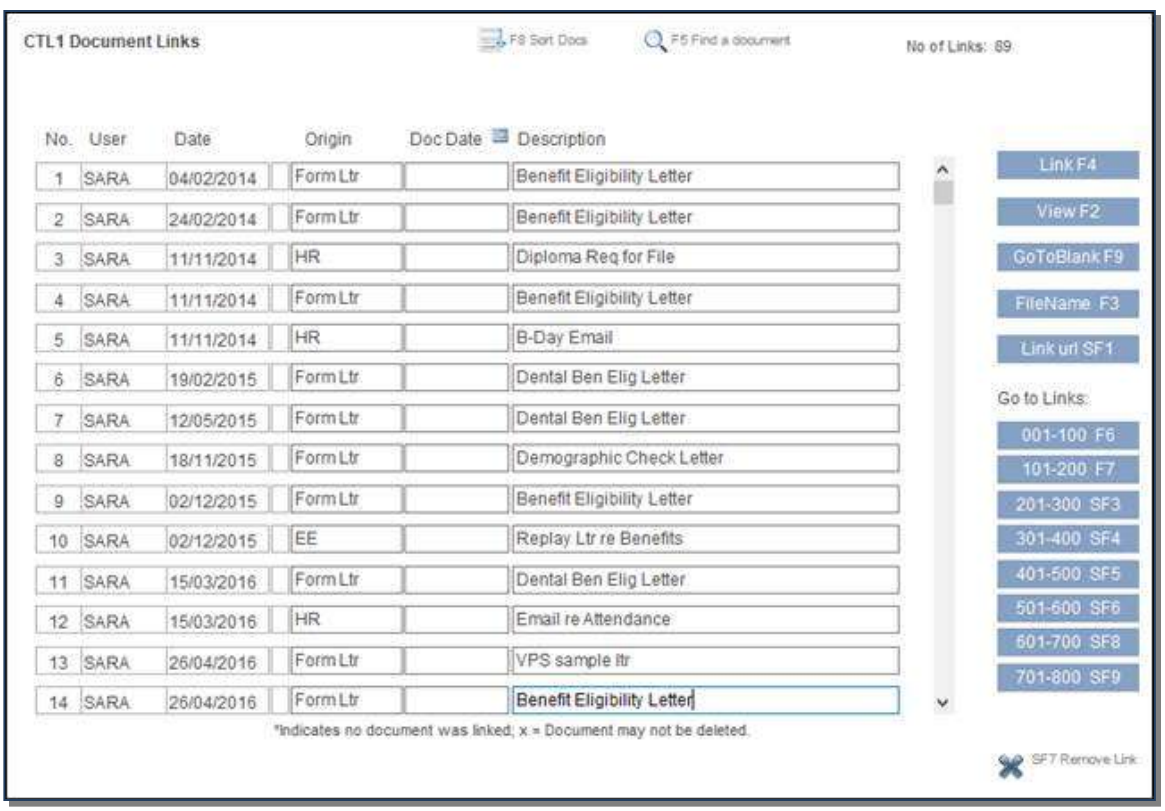
- Documents (.doc, .pdf)
- Images (.jpg, .gif)
- Spreadsheets (.xls)
- Emails (.msg, .html)

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.



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.

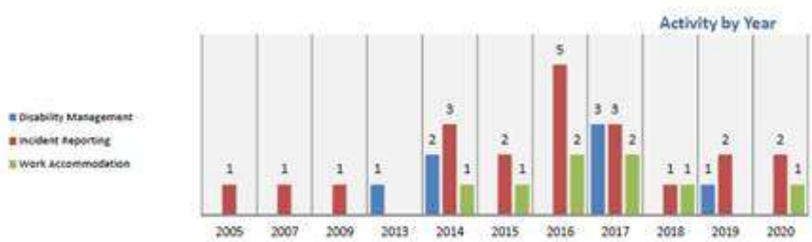
Employee Activity

ABRAHAMS, PETER

Date of Birth: October 31, 1980
Range: 4-Oct-05 – 20-Jan-20
Employee ID: 125

Disability data does not include REOs

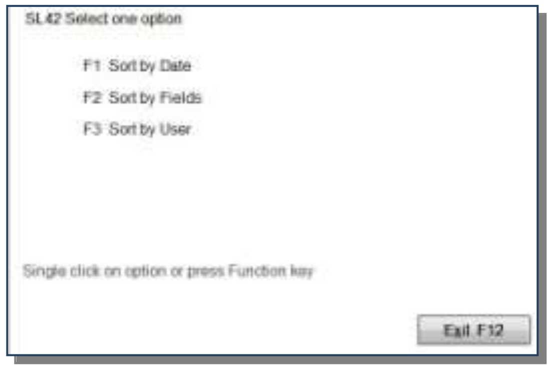
Position (All)



Module	Date Inc/Acc / Prog	Class	Status Desc (if applicable)	Type Reason	RTW Date (if applicable)	Closed Date	Total Costs (if applicable)	Days Lost (if applicable)	Records
Disability Management Claims							**$23,293.00**	**595**	**7**
	(blank)	Short Term Disability	Approved	Illness	15-Apr-14	30-Apr-14	$0.00	43	1
	21-Apr-19	Short Term Disability	Approved	Injury	1-Oct-19		$100.00	97	1
	27-Nov-17	Long Term Disability	Approved	Illness	5-Feb-18	5-Feb-18	$5,068.00	43	1
	24-Jul-17	Long Term Disability	Pending	Injury	31-Jan-19	15-Feb-19	$50.00	307	1
	4-Jan-17	Long Term Disability	Approved	Injury	23-Jan-17	30-Jan-17	$3,725.00	15	1
	13-Nov-14	Short Term Disability	Approved	Injury	15-Dec-14	30-Mar-15	$600.00	70	1
	9-Jun-14	Short Term Disability	Approved	Injury	23-Jun-14	30-Jun-14	$13,750.00	20	1
Incident Reports and Claims							**$109,953.47**	**562**	**21**
	15-Jan-20	Reoccurrence	Approved		20-Jan-20		$0.00		1
	6-Jan-20	Lost Time Inc	Pending	Struck By	13-Jan-20		$4,212.50	23	1
	2-Dec-19	Health Care Inc	Approved	Over Exertion			[illegible]		1

TMB Audit Report

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



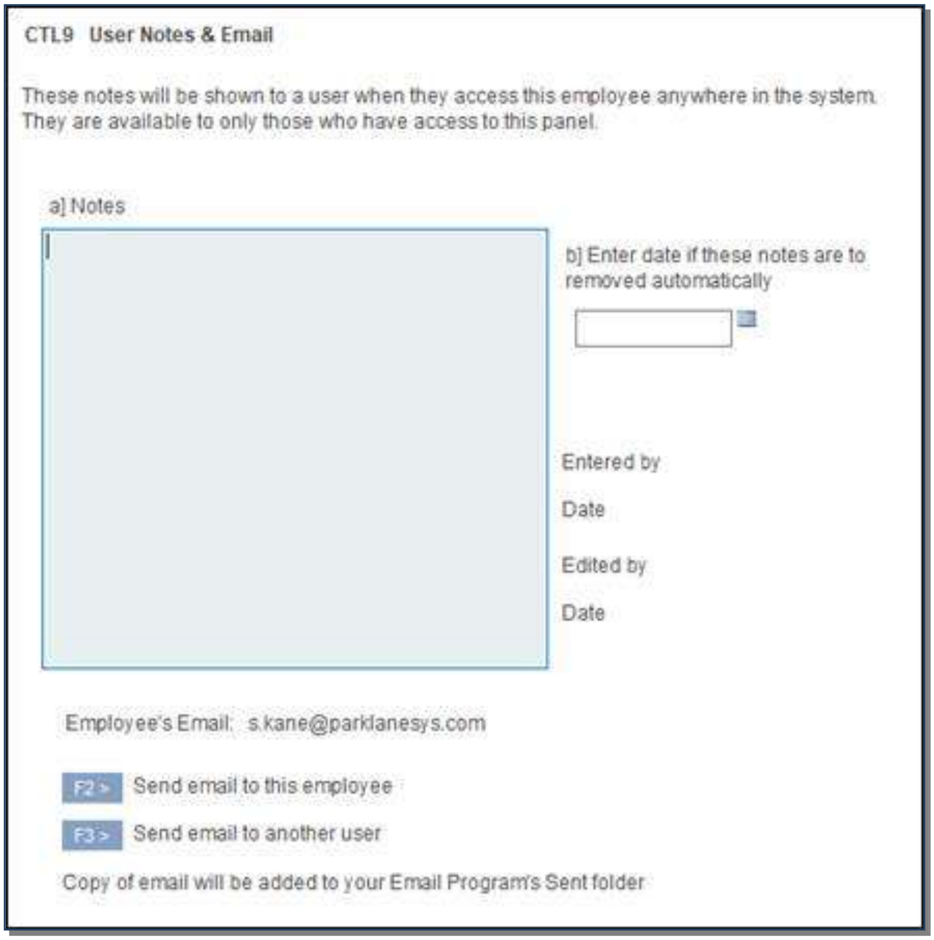
User Notes & Email

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.

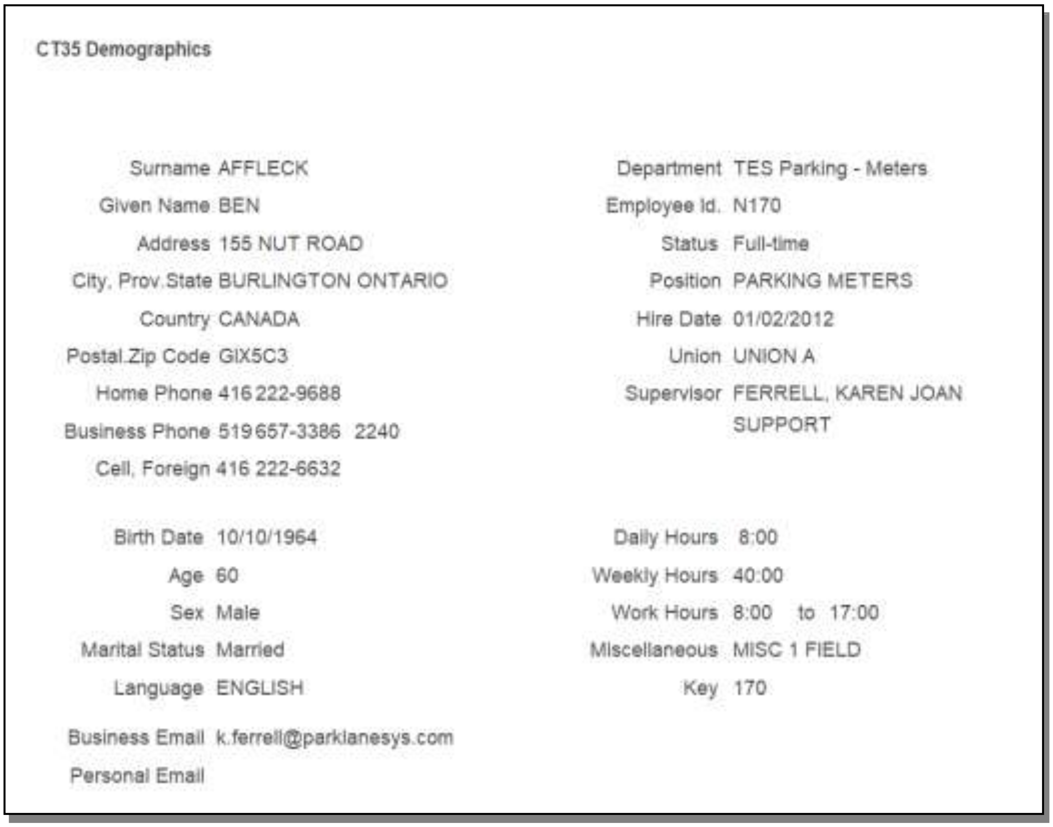
- **F3 Open mailto to send email to another user** wherein the list of Parklane Users will appear at which point clicking on a name will open applying the users email address from Security. When using either email option, a copy of the email will be added to your Email Program's sent folder.



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.



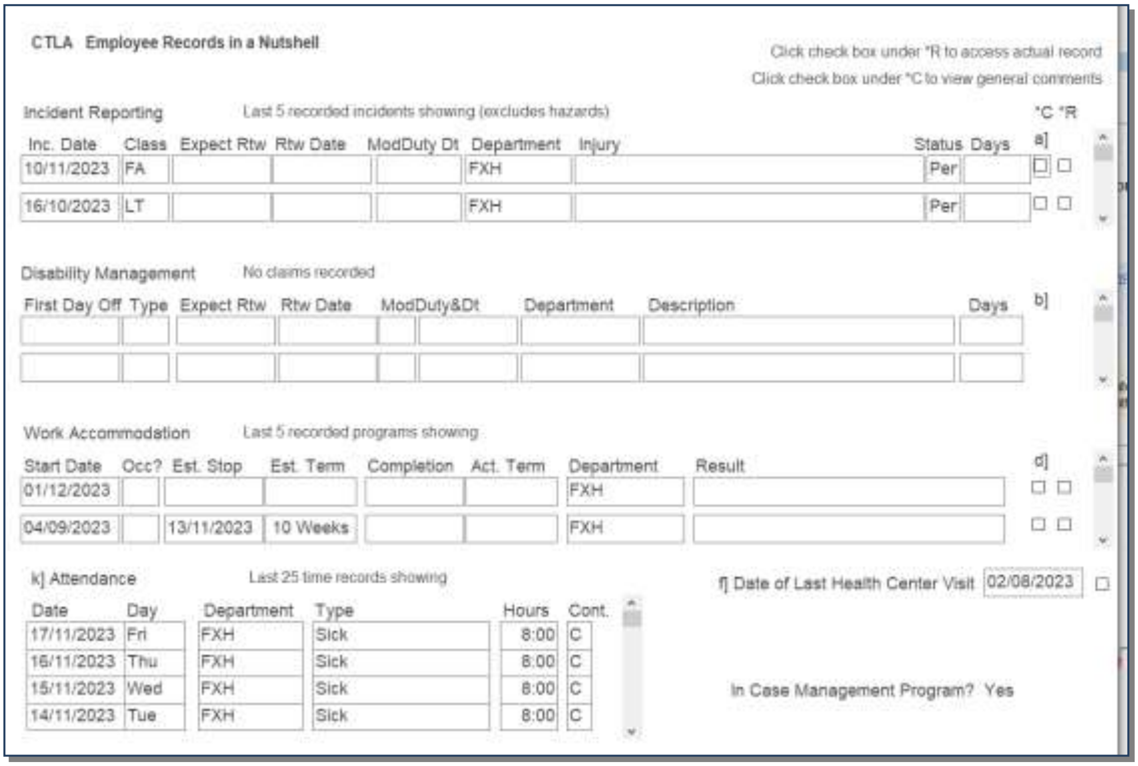
CT35 Demographics

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	GIX5C3	Union	UNION A
Home Phone	416 222-9688	Supervisor	FERRELL, KAREN JOAN SUPPORT
Business Phone	519 657-3386 2240		
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.



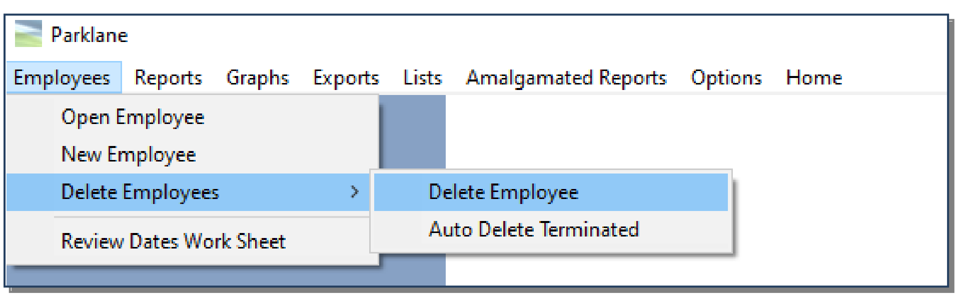
Delete Employee(s)

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.

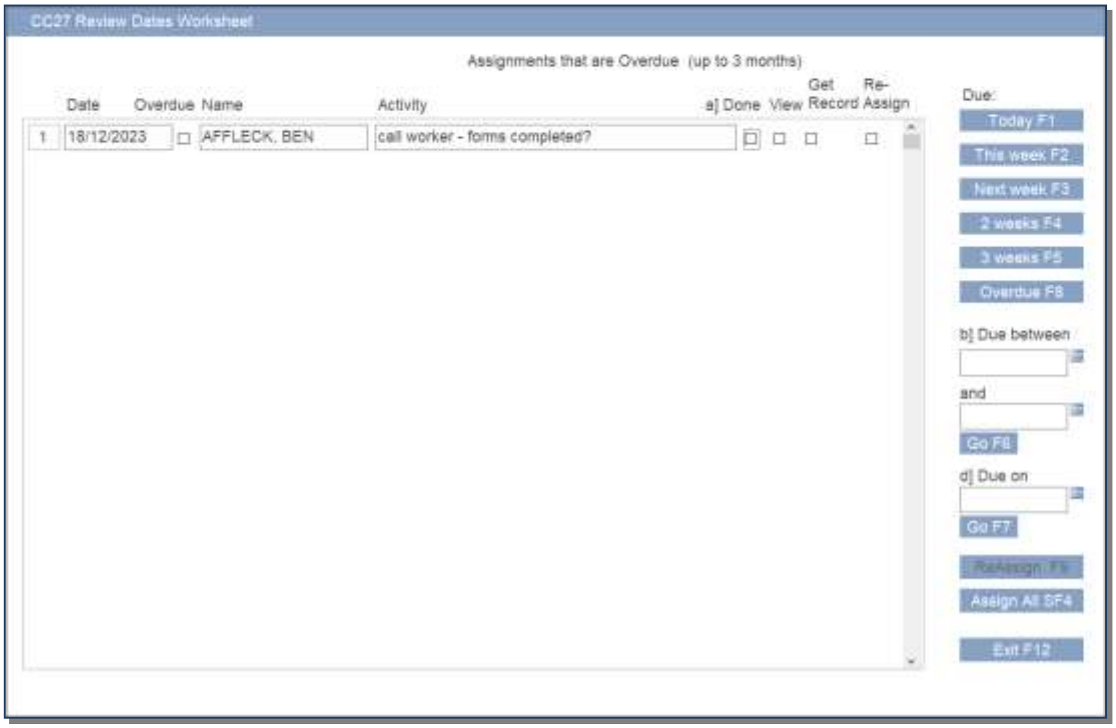
If you attempt to delete an employee who has any of these types of records, you will be warned accordingly and your request to delete will be denied.



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.



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 Exporrt 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.

Index

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