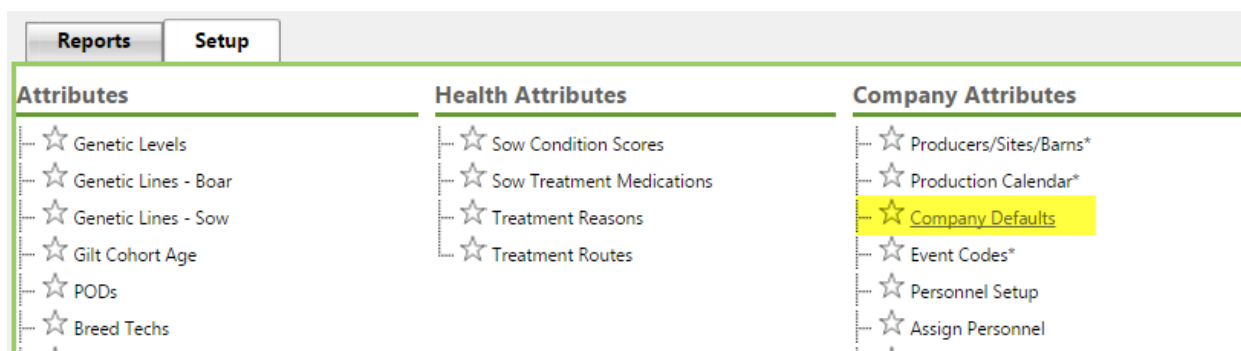


## Personnel Setup

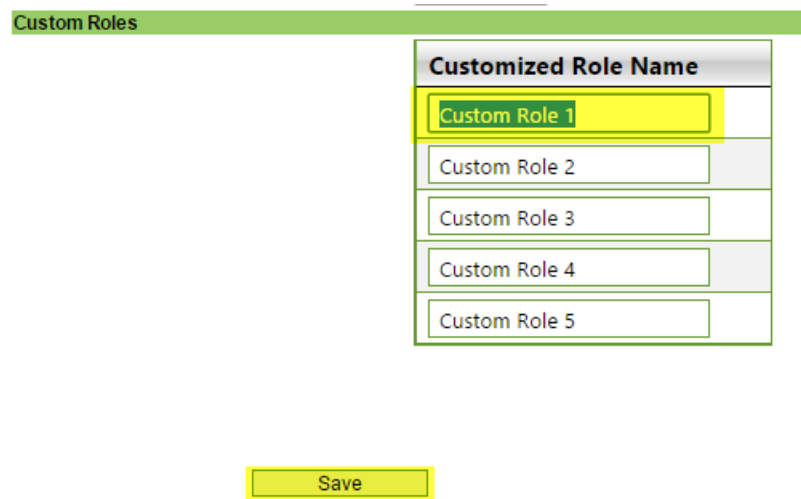
The Personnel Setup screen is where you will add your staff and assign them to their Role within the company. You can also track any Certification an individual has. There are six built in Roles already created. These six are: Supervisor, Service Tech, Veterinarian, Nutritionist, Barn Manager, and Site Manager.

In addition to these six Roles each company is allowed 5 Custom Roles to name as you need. To name these Roles go to the Setup tab, Company Attributes section of a module. Click on Company Defaults.



Attributes	Health Attributes	Company Attributes
☆ Genetic Levels	☆ Sow Condition Scores	☆ Producers/Sites/Barns*
☆ Genetic Lines - Boar	☆ Sow Treatment Medications	☆ Production Calendar*
☆ Genetic Lines - Sow	☆ Treatment Reasons	☆ <b>Company Defaults</b>
☆ Gilt Cohort Age	☆ Treatment Routes	☆ Event Codes*
☆ PODs		☆ Personnel Setup
☆ Breed Techs		☆ Assign Personnel

Scroll to the bottom to Customized Role Name. Rename any field to the Role you want. Click Save.



Customized Role Name
Custom Role 1
Custom Role 2
Custom Role 3
Custom Role 4
Custom Role 5

Save

To set up your Personnel

Reports

Setup

Attributes

- Genetic Levels
- Genetic Lines - Boar
- Genetic Lines - Sow
- Gilt Cohort Age
- PODs
- Breed Techs
- Sow Comments

Health Attributes

- Sow Condition Scores
- Sow Treatment Medications
- Treatment Reasons
- Treatment Routes

Company Attributes

- Producers/Sites/Barns\*
- Production Calendar\*
- Company Defaults
- Event Codes\*
- Personnel Setup**
- Assign Personnel
- Site Defaults

+ Add new record

Row	Edit	First Name	Last Name	Phone Number	E-mail	Cer
		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

First Name:

John

Last Name:

Smith

Phone Number:

515-555-5555

E-mail:

jsmith@yahoo.com

Active:

☒

Save

Cancel

Click Add New Record

Fill in information

Click Save

## To Assign Roles

+ Add new record

Row	Edit	First Name	Last Name	Phone Number	E-mail	Certificates	Roles	Current Roles	Active
		john		<input type="text"/>	<input type="text"/>				<input type="checkbox"/>
1	Edit	John				Certificates	Roles		<input checked="" type="checkbox"/>
2	Edit	John				Certificates	Roles		<input checked="" type="checkbox"/>
3	Edit	John				Certificates	Roles		<input checked="" type="checkbox"/>

NoFilter

Contains

**StartsWith**

EndsWith

EqualTo

Search for your person

## Click on Roles Button

Roles

Save

Row	Role	Active
1	Supervisor	<input checked="" type="checkbox"/>
2	Service Tech	<input type="checkbox"/>
3	Veterinarian	<input type="checkbox"/>
4	Nutritionist	<input type="checkbox"/>
5	Barn Manager	<input type="checkbox"/>
6	Site Manager	<input type="checkbox"/>
7	Custom Role 1	<input type="checkbox"/>

Select the Role for the person and Save.

They may have multiple roles.

To Add Certificates

Click on Certificates Button

The screenshot shows a window titled "Certificates". At the top left is an "Add" button. Below it is a table with the following headers: "Row", "Edit", "Certification", "Certification #", "Date Taken", and "Expiration Date". The table is currently empty. Below the table is a form with the following fields: "Certification:" with a dropdown menu showing "PQA", "Certification #:" with a text input field containing "555555555", "Date Taken:" with a date picker showing "3/3/2016", and "Expiration Date:" with a date picker showing "3/3/2017". At the bottom of the form are "Save" and "Cancel" buttons. Red arrows point from the "Add" button to the "Certification" field, from the "Certification #" field to the "Date Taken" field, and from the "Date Taken" field to the "Expiration Date" field. Red text on the right side of the form says: "Click Add", "Fill in information", and "Click Save".

**Certificates**

**Add**

Row	Edit	Certification	Certification #	Date Taken	Expiration Date
-----	------	---------------	-----------------	------------	-----------------

Certification: PQA

Certification #: 555555555

Date Taken: 3/3/2016

Expiration Date: 3/3/2017

Save Cancel

No records to display.

Click Add  
Fill in information  
Click Save

To Edit Personnel Information

The screenshot shows a window titled "Personnel Information". At the top left is a "+ Add new record" button. Below it is a table with the following headers: "Row", "Edit", "First Name", "Last Name", "Phone Number", and "E-mail". The table contains three rows of data. The first row is highlighted in green. The second row has an "Edit" button. The third row has an "Edit" button. Below the table is a form with the following fields: "First Name:" with a text input field containing "John", "Last Name:" with a text input field containing "Smith", "Phone Number:" with a text input field containing "515-555-5555", "E-mail:" with a text input field containing "jsmith@yahoo.com", "Current Roles:" with a dropdown menu, "Active:" with a checked checkbox, and "Save" and "Cancel" buttons. Red arrows point from the "Edit" button to the "First Name" field, from the "First Name" field to the "Last Name" field, and from the "Last Name" field to the "Phone Number" field. Red text on the right side of the form says: "Click on Edit", "Change Information", and "Click Save".

+ Add new record

Row	Edit	First Name	Last Name	Phone Number	E-mail
		john			
1	Edit	John	Honaizer		
2	Edit	John	Mackrell		
3	Edit	John	Smith		

First Name: John

Last Name: Smith

Phone Number: 515-555-5555

E-mail: jsmith@yahoo.com

Current Roles:

Active: ☒

Save Cancel

Click on Edit  
Change Information  
Click Save

To Edit Roles or Certificates, click on the appropriate button, make changes, and Save.