

Drägerware. Personnel Management "Basic"

User Manual

from Version 2020.1



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1 Introduction

1.1 For your safety

1.1.1 General safety information

- Before using this software, carefully read the user manual.
- Strictly follow the user manual. The user must fully understand and strictly observe the instructions.
- Do not dispose of the user manual. Ensure that it is retained and appropriately used by the product user.
- Only trained and competent users are permitted to use this software.
- Comply with all local and national rules and regulations associated with this software.
- Do not use faulty or incomplete software.
- Do not make any changes to the software.
- Notify Dräger in the event of any faults or failure of the software.

1.1.2 Definitions of alert icons

The following alert icons are used in this document to identify and highlight areas of the associated text that require a greater awareness by the user.

A definition of the meaning of each icon is as follows:



ATTENTION

Indicates a potential situation in which data could be accidentally modified or deleted.

If this situation is not avoided, data may be corrupted or lost with no possibility of restoration, requiring data to be input again.



NOTICE

Indicates additional information on how to use the software.

1.2 Description

1.2.1 Feature description

Drägerware.Workshop products are software for technical workshops in various organisations and industrial establishments.

They are used for inventory and support the administration and service of devices, systems, equipment, power units and vehicles in a central data pool and for all workshop areas of an organisation, including at different sites.

The software can be used to plan, perform and record services. Testing and monitoring processes can be set up.

Dräger test devices can be integrated via interfaces.

Additional test devices for other workshop areas, such as pump and hose test stands, can also be integrated into the service process.

1.2.2 Intended use

Drägerware.Workshop is software for installation on computers with the requirements described in Chapter 1.4 for support with inventory and service of technical safety equipment.

The Personnel Management program is used to manage the user's fire brigade personnel. Persons can belong to different sites or organisational units or be structured within an organisational unit by departmental associations such as firefighter operations department, professional fire brigade, company fire brigade or any other departments. Training, qualifications or also fitness and confirmations that are relevant for service can be recorded with the personnel management. This supports the breathing apparatus entry control as per Fire Service 7 or monitors and documents other verifications that must be performed regularly. The integration of basic personnel data in the workshop application also means loan processes are possible in Drägerware.Workshop – for example for contractors in an industrial operation.

1.3 Hardware requirements

The general minimum requirements for workstations and servers are described in the list of hardware and software requirements.

The hardware requirements of each individual program are described in detail in the respective specifications included in the scope of delivery.

1.4 Information on this manual

All Drägerware.Workshop applications are operated in the same way.

The special characteristics of a workshop program are dealt with in separate sections or supplementary sections which the customer receives with the purchase of the Drägerware.Workshop application.



NOTICE

This manual describes all the functions of the software.

If functions that you cannot call up are explained, they have not been purchased.

The scope of the respective installation is described on the delivery note and in the specifications.

Optional functions can be added to the Drägerware.Workshop basic package at any time (modular principle). They can be ordered directly from Dräger.

This manual can be accessed as an aid in the program and with the <F1> function key. It serves as reference, not as a training manual.


This manual describes the Drägerware.Personnel Management "Basic".


Dräger recommends having software updates performed exclusively by Dräger or authorised Dräger partners.

1.5 Field types and field functions in the programs

The same field types and field functions are used in all the Drägerware programs for processing data.

They are listed in the following table:

Alphanumerical fields	The standard input fields permit the entry of all characters.
Numerical fields	Numerical fields only permit the entry of numbers (e.g. personnel number, account number).
Selection fields	With few exceptions, selection fields comprise alphanumerical or numerical fields. Selection fields are used to retrieve a user menu (user table) using the <F4> function key. Tables which simplify data acquisition are saved in the user menus so that recurring texts do not need to be entered via the keyboard and spelling mistakes are avoided.
Output fields	Unmodifiable data are referred to as output fields. The field content of output fields is shown in grey and cannot be processed via the input field.
Date fields	<p>Date fields accept the date format: "01.01.2003". The day and month must always be entered using two digits. The dot between day, month and year is automatically entered by the program. The first two digits of the year are automatically assigned the first two places of the current year if the year is entered using two digits. Please take care that the <Caps Lock> key is not pressed when making the entry as otherwise no entry is possible.</p> <p>Date fields contain special input functions. Press the "T" key (today) to import today's date into the date field; press the "Y" key (yesterday) to import yesterday's date, and press the "M" key (tomorrow) to import tomorrow's date. In addition, by entering the "+" or "-" character, a number and the identifier "D" (for days), "M" (for months) or "Y" (for years), the currently specified date is increased or reduced. So, in the case of the following entry: +3w the date currently displayed in the input field is moved forward three weeks.</p> <p>Pressing the <F4> function key or the  key next to a date field opens a perpetual calendar. A date can be selected in the calendar, which is then included in the date field. Users can scroll forward and back through days and weeks with the arrow keys and forward and back through months with the <Page Up/Down> key.</p>
Time fields	Time fields require the entry of a time. The current time is entered by pressing "n" (now). The colon between the minutes and hours is automatically entered by the program. In addition, by entering the "+" or "-" character, a number and the identifier "h" (for hours) or "m" (for minutes), the current time is increased or reduced. So, in the case of the following entry: -3h the current time indicated in the display field is moved back by three hours.

Logical fields	These fields only accept "Y" for Yes and "N" for No. These fields can be edited using the space bar - Y, N, blank field appear automatically.
Memo fields	These fields are used to save additional information. Additional information in plain text can be saved for every data set.
Mandatory fields	Mandatory fields are identified in the program by a red asterisk next to the field. An input in a mandatory field is necessary before a data set can be saved. If a user menu is saved for a mandatory field, it is displayed automatically if the user tries to skip a mandatory field without making an entry. When trying to save a data set without fully completed mandatory fields, the user is prompted to fill the blank fields. Examples of mandatory fields are a person's first name and surname or the type of application.
Exact fields	Exact fields are displayed with a grey background in the program. An entry in an exact field must correspond exactly to an entry in the user menu. The fields are also case-sensitive. If the field contents entered do not match a menu item, the following message appears: "Entry is not in the user menu!". This type of field is necessary so that fields for which an evaluation can be performed can be populated uniformly and can be fully evaluated. If it is necessary to expand the user menu, this takes place via the "Create Entry" user menu if the necessary privilege was assigned.
User menu	Freely definable tables which the user can call up and also change with the corresponding authorisations. Retrievable with the <F4> function key, among others.
User menu with address link	User menu that provides the option of linking addresses to Drägerware.Address Management, if the Drägerware.Address Management program has been licensed. A user menu with address links is identified by the  icon.
Radio button	Radio buttons are round buttons, usually combined in groups. Only one radio button from a group of radio buttons can be selected at a time.
Checkbox	In contrast to radio buttons, checkboxes are square. Multiple selections can be made from a group of checkboxes.
Pull-down menu	Menus that can drop down using the mouse to select a function. If using a keyboard, a pull-down menu is opened with an Alt + <key> combination (e.g. Alt + D for the pull-down menu file). The key to be activated together with <Alt> can be seen from the underlined letter in the menu title.

1.6 Function keys for ease of operation

The following keys or key combinations can be used in many dialogue windows:

Key or key combination	Scope of application	Meaning
F1	Everywhere	Calls up Help.
F4	Selection fields	Opens the user menu to select an entry.
h	Date fields	Enters today's date.
j	Time fields	Enters the current time.
g	Date fields	Enters the date of the previous day.
m	Date fields	Enters the date of the following day.
+/-xD	Date fields	Takes the current date and adds or subtracts x days.
+/-xW	Date fields	Takes the current date and adds or subtracts x weeks.
+/-xM	Date fields	Takes the current date and adds or subtracts x months.
+/-xH	Time field	Takes the current time and adds or subtracts x hours.
+/-xM	Time field	Takes the current time and adds or subtracts x minutes.

The default Microsoft Windows® keys or key combinations remain valid.

You can also change the column width of tables for a clearer view. This is done by moving the respective column divider in the header with the mouse. Press and hold the left mouse button to drag the column to the required width.
















The program is not case-sensitive (e.g. for user menus and identification).

If the keyboard is preferred to the mouse, the **<TAB>** key can be used to move between the fields.

1.7 Abbreviation of buttons

The application contains the following icons. However, not all icons are activated on every page and in this case will not be active.

The icons available in the application are listed in the following table:

Symbol	Meaning
	Opens a data set and also provides an overview display.
	Saves a data set.
	Creates a new data set.
	Copies data sets.
	Scroll back to previous data set.
	Scroll forward to the next data set of the prior selection.
	Deletes data sets.
	Calls up the Help function.
	Reset filter (list selection).
	Preview.
	Prints a data set.
	Open saved database (e.g. item database).
	Remove entry.
	Add entry.
	Edit dialogue.



NOTICE

Scrolling forward and back only works if a piece of equipment or a test has been selected via Selection or Overview. If a piece of equipment has been selected via identification, scrolling is not possible.


2 Main window of the application

2.1 Operating elements in the main window

The main window of the **Drägerware.Personnel Management "Basic"** is divided into three areas:

- Left: Selection of departments and schedule
- Middle: List of persons for the department selected on the left
- Right: Details of the person selected in the middle

2.2 Selection of departments and schedule

The schedule shows all the dates of the entered persons that are within the selected period. The time period can be adjusted in the middle section, using the  **Period** button.

The departments can be deleted by right-clicking on them and confirming with the left mouse button. Only departments without persons can be deleted.

New departments can be created by accessing the user menu from the **Department** field for a person in the **Departments** tab and creating a new department here.

2.3 List of persons for the department selected on the left

Search

You can search for any text with this function. The persons who match the search text will be displayed.

New person

Before creating a new person, a department to which the person belongs must be selected in the area on the right.

Print

This function lets you print the person's record card.

Table notes

Clicking the mouse in the relevant table column lets you sort the column in ascending/descending order.

In the first column, all persons who are defined as **Wearers of respiratory protective devices** via the **Qualification** tab of the person in the top field are marked as **Wearers of respiratory protective devices** with an icon.

The second column uses the **Due dates** icon in the departments to indicate which persons already have a due date and which dates are already due in the schedule.

Columns 3 to 5 contain the personnel number, surname and first name of the person.

Columns 6 and 7 are optional, and display the due dates of the qualifications, if this is selected by right-clicking the mouse in the column heading.

2.4 Personal details

The personal details are shown on the right-hand side of the main window in the following tabs:

Data

The personal data for individual persons can be saved here.

Before creating a new person (**New person** in the middle section), a department to which the person belongs must be selected in the area on the right.

The program first directs the user to the mandatory fields. These are the **Personnel no.**, **First name**, **Surname** and, where applicable,¹ **Date of birth**. If these fields are edited, the data set must be saved.

After saving, the assignment to a department appears. The mandatory **Department** and **From** fields are entered in this dialogue. After saving the department, edit the remaining fields for the person.

Save

This button is used to save the personnel data set.

Print

This function lets you print the person's record card.

Delete person

This function deletes the current personnel data set from the database.



NOTICE

When a person leaves, the data can be retained in the database for historical purposes. An exit date can be set to prevent this personnel data from being included in lists. If necessary, follow the required erasure regulations for privacy reasons.

Before data sets are deleted, a security prompt follows the plausibility check to ensure that the user really wants to delete the selected data set.

¹ The date of birth can be defined as a mandatory field under Settings.

Departments

Entering the fields:

Department: Enter the relevant department
From/to: Enter the period in which the person was or is active
City:
District:
Additional information 1:
Additional information 2:



NOTICE

The entries in the **Department** category are used as the basis for a very large number of functions in Drägerware.Personnel Management "Basic" and must therefore be current and accurately entered. When switching from one department to another, always make sure that the "From/to fields" of both departments are correctly entered. No entry in the "To field" will be interpreted to mean that the person is still active in this department.

A person can be assigned to multiple departments, e.g. operations department and music department. A start and end date can be entered for every department. If an end date is not entered, this person is still active in the department. The departments for a person can appear as follows:

Youth department	01/10/1980 - 31/12/1985
Operations department	31/12/1985 -
Music department	15/01/1987 - 20/05/1990
Music department	12/08/1992 -

The operations department and the music department are active in this data set. In the interim period, this person was no longer a member of the music department. This data set can be selected under the **Find person** menu item by selecting the **Operations department**, as well as by selecting the **Music department**.

The membership (affiliation with a department) within an organisation with the same identifier (BOS) while retaining the historical data is reorganised by assigning the data set to the new department. The data of the previous department are retained in the system to record the history. A multiple assignment to the same department allows additional service periods in other fire brigades to be recorded.

A data set is deactivated within a department by assigning an exit date. This does not affect memberships in other departments. The data set is reactivated by creating a new data set for this department or by deleting the exit date. Only a person with access authorisation or the **Administrator** function can perform the reactivation.

Equipment

The **Equipment** tab shows the items of equipment that have been issued to a person via the instrument handout (in the **Location change** application) of the Drägerware.Workshop software.

Training


If the **Manage training** option was set in the system-wide settings, an additional tab for entering training (courses) is available.

Qualifications

The **Qualifications** tab can be used to enter training, qualifications or even suitabilities and verifications relevant for the service. This supports the breathing apparatus entry control as per Fire Service 7 or monitors and documents other verifications that must be performed regularly.


If a person is marked as a **wearer of respiratory protective devices** via the checkbox in the top section, this person is also marked as such with the relevant icon in the department overview and the schedule.

2.5 Notes tab

The **Notes** tab provides an internal application information system. The tab is shown or hidden in the header with the  **Notes** button. The information system allows users to exchange messages within the system (similar to the functions of an email program).


2.5.1 Create note

Click on the  **New** button to open a new window in which a message can be written.

The receiver of the message can be selected with the  **Recipient** button.

This window also shows the available user groups from the user management, which makes it quick and easy to send messages to multiple users. Multiple recipients can be selected using the default Windows keys **<Shift>** or **<Ctrl>**.



It is also possible to send a note to oneself in the form of a reminder.

In addition to using the **Subject** and **Note** fields, a PDF file can also be attached to the message. Use the  button for this.

2.5.2 Read note

If a new message has been sent, it is displayed in bold. Drägerware.Workshop software programs also start automatically in the Notes tab if a new message is pending.

The message can be answered directly with the  **Reply to sender** button.


If a note has an attachment, it can be displayed with the  icon. It can be opened with the  **Open attachment** button.



NOTICE

A PDF viewer (e.g. Acrobat Reader) is required to open the attachment.

The message is marked as read with the  **Note read** button and the icon disappears.

The message is deleted after confirmation of the security prompt with the  **Delete note** button.

The view is refreshed and notes are called up again with the  **Refresh** button.

2.5.3 Print note

The **Print** button opens a context menu.

Preview

Clicking on Preview opens a preview window in which the marked note can be printed.

Print

Click on Print to send the message directly to the default Windows printer for printing.

Designer

This opens the list designer, which can be used to edit the layout of the list.



NOTICE

The list designer is a component integrated into Drägerware and supplied by combit GmbH. The list designer can be used to adapt existing lists to meet user requirements. Dräger Service does not support this program. Modification of the lists prepared by Dräger requires very good IT skills and background knowledge of the functions of the list designer. A help tool for the list designer can be opened by pressing the **<F1>** key. Alternatively, Dräger Service offers an economical option for creating your required print layout.

3 The menu bar functions

The pull-down menus of the menu bar in the main window can be pulled down using the mouse and with Alt + <underlined letter>. Next, the individual functions of the menu bar are explained.

3.1 File menu

The **File** menu lets you exit the application and import persons.


3.1.1 Import persons

Persons can be imported from an Excel file (.xls). An import template can be provided by Drägerware Service if necessary.

The following conditions must be observed:

- All columns with the red asterisk * are mandatory fields and must be entered for every person.
- All persons must be assigned to precisely one department by the import. The departments do not need to be created first, they are automatically created. After import to the application, persons can be assigned to other departments.
- Column headings must not be changed in the Excel file.
(Exception: Qualifications)
- Additional qualifications can be created by new columns with the prefix "Q_". The qualifications do not have to be created first.

3.1.2 Export persons

Persons from the previously selected department or even **All** can be exported to an Excel file. To do so, the path and file name for the export file (.xlsx) must first be entered. Then press the  **Start** button to start the export.

Exit

Exits the program. Close all personnel file windows before closing the program.

3.2 Lists menu

Record cards and lists can be selected in the **Lists** menu.

Personnel record card

All personnel data are exported to a record card.

Lists

The following permanent lists are available:

- Departments,
- Overview of breathing apparatus
- Training,
- Training not available,
- Qualifications,
- Qualification not available,

3.2.1 Selection list

In this list ("Qualification not available"), for example, the various criteria for list output can be selected via **Selection** and **Sort**. If a field is blank, this field is not used as a filter for the personnel data, i.e. if all fields are blank, all personnel data sets are output. In this example, a course name must be selected (mandatory field).

3.2.2 Preview

Click on "Preview" to view the result of the currently selected list (possibly several pages) and print out if required. A preview of the printout with the selected data will be displayed.

3.2.3 Preview with options

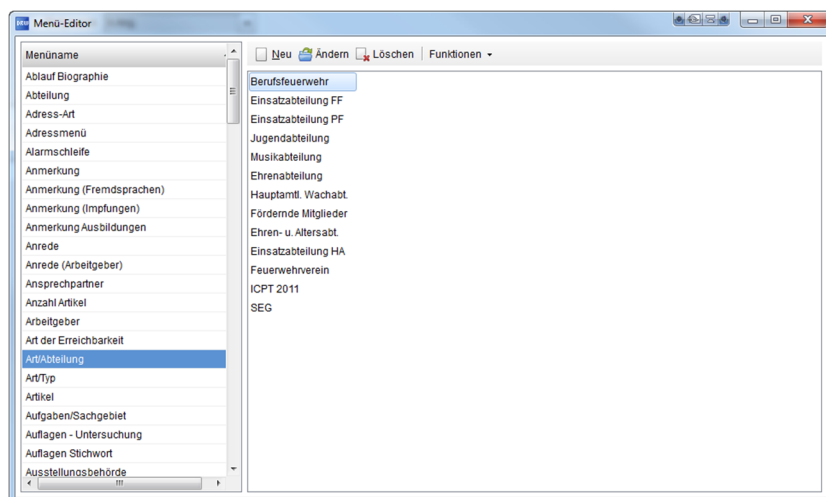
Click on "Preview with options" to open the "Output settings" window. This is where the output medium and additional print options can be defined and the document printed.

4 Settings menu

4.1 System settings

4.1.1 Menu editor

The user menus used in the application can be edited with this menu item. To do so, the user must have the **User menu** authorisation.



Menu editor

4.1.2 For administrators only

4.1.2.1 Create user, change user, delete user

To create a user, enter the values for **User**, **Abbreviation**, **Minimum password length**, **Password** and **Confirm password**. The **Allowed identifiers**, **Organisation**, **Telephone**, **Fax** and **Email** fields are optional fields and need not necessarily be filled in. To delete a user, enter the user name or select the user from the user menu, click **Delete user** and confirm the security prompt.

4.1.2.2 Create user group, change user group, delete user group, user group assignment

To create a user, enter the values for **Group**, **Abbreviation** and **Organisation**. To delete a group, click **Delete user group** and confirm the security prompt. One or more users can be assigned to a specific group with **User group assignment**.

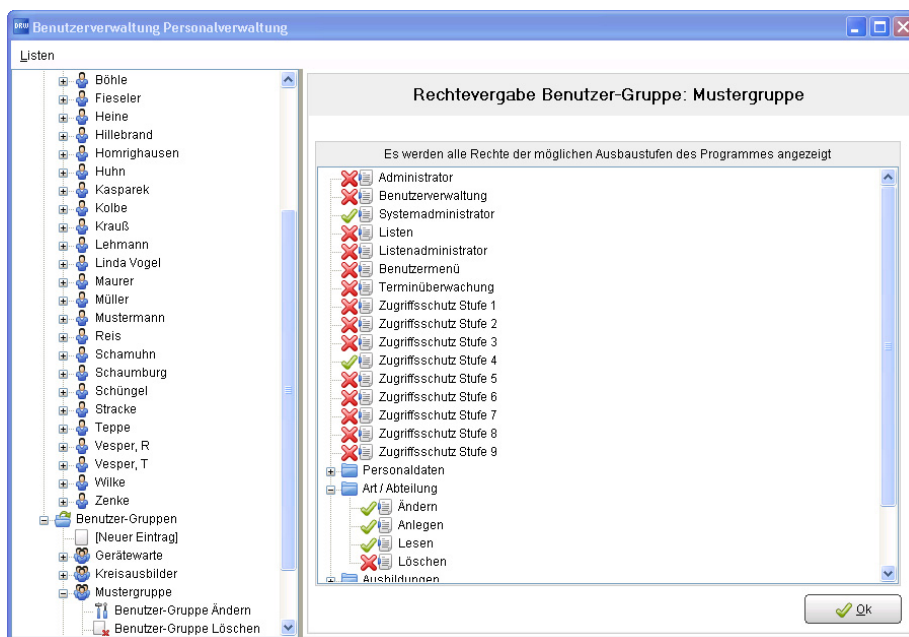


NOTICE

You cannot login with a group. To edit the data for a group, you must always assign one or more users to this group.

Groups are useful for distributing function-dependent notes to multiple employees or creating templates for user authorisations. The user has the authorisations of the single user and the authorisations of the group to which the user belongs.

4.1.2.3 Granting authorisations



Granting user group authorisations

Here, the access authorisations of the users and groups for the current program can be granted. First, select the user or group and select **Granting authorisations**. The required authorisations are now activated by a double-click or pressing <Enter>. The access authorisation is shown by the green tick and **no access authorisation** by the red cross. The following authorisations can be granted for every tab: **Change, Create, Read, Delete**. If one of the authorisations is enabled, the user can perform the enabled function for the corresponding persons in **Drägerware.Personnel Management "Basic"**.



NOTICE

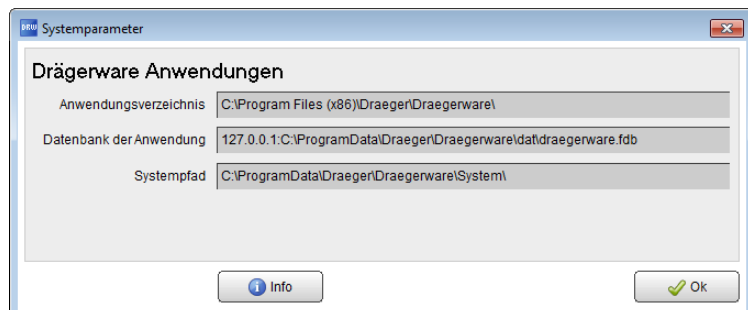
The authorisations described below may vary depending on the licence status of **Drägerware.Personnel Management "Basic"**; all possible authorisations and tabs are listed here.

Additional possible authorisations are:

"Administrator", "User management", "System administrator", "Create", "Change", "Read only", "Delete", "Lists", "List administrator", "User menu", "Send data", "Department", "Training", "Dates of birth", "Suitability/First Aid/Records".

4.1.3 Display paths/change paths

The system parameters are used to define parameters for the program environment (registry entries) that can vary from user to user. This menu item can be used to check or change the path settings for the program. From Version 2012.02, the computer settings are the same for all Windows users.



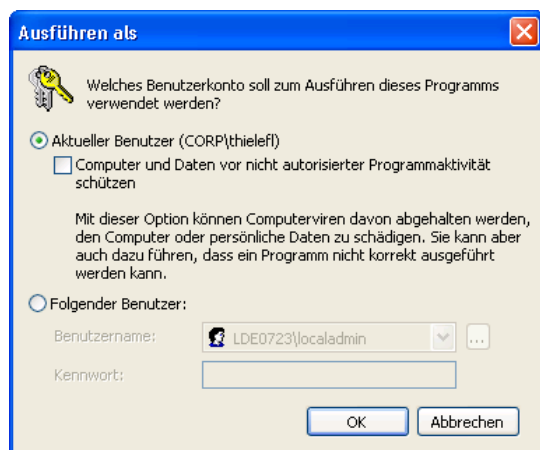
System parameters

The paths are preset during installation as specified by Windows and should not be changed.

The "Application database" data path is set to "127.0.0.1:C:\Documents and Settings\All Users\Application Data\Draeger\Draegerware\dat\draegerware.fdb" by default. The IP address 127.0.0.1 refers to the local computer for the single-workstation version; in a network, the address of the server is used.

The "Info" button accesses the info dialogue.

In some cases, opening "Change paths" opens the following dialogue:



Windows dialogue

The "Protect computer and data from unauthorised program activity" checkmark must be removed to run this function.



See the Administrator Manual for a more detailed description of this function, as well as the paths and buttons in this dialogue.



4.2 System-wide settings

System-wide settings for various evaluations of **Drägerware.Personnel Management "Basic"** are defined with this menu item.

The specified department entries are compared with the department entries for the specific person in the lists; the personnel data are taken into account for further processing only if they match.

4.2.1 Active service

This tab is used to define the active service departments. A department is added with the  **Add department** button, the  **Remove department** button removes a previously selected department.

The  **Save** button saves the defined parameters, the  **Cancel** button exits the parameter without changes. These two buttons are available in every tab of the parameters.

4.2.2 Settings

The **Manage training** option allows **Qualifications** to be shown separately according to **Training** and **Suitabilities**.

The **Manage registration statuses** option allows one person to be saved for each qualification, as well as the status (**registered**, **unsuccessful**, **successful**) for this person, and also enables a registration date to be entered.

The **Define date of birth as mandatory field** option should be selected if personnel qualifications are calculated depending on age (for example: G26.3).

4.2.3 Email

The standard text for expired qualifications can be adapted in the **Email** tab.

The following variables are available:

Variable	Field from Drägerware Personnel Management
\${DATE}	Due date
\${DESIG}	Designation of the qualification
\${FIRST NAME}	First name of the relevant person
\${SURNAME}	Surname of the relevant person
\${PERS_NO}	Personnel number of the relevant person

4.3 User settings

4.3.1 Automatic log-in

If automatic log-in is enabled (checkmark before the menu item), the user only needs to log into one Drägerware program. All other programs in the management module group can then be started without logging in. The automatic log-in is not available for the "Administrator" user.

4.3.2 Activate deactivated notes

All deactivated notes (Save, Exit etc.) can be reactivated in this menu item. The notes can be deactivated in the notes dialogue.

5 User menu

5.1 Change user

If this function is selected, the current user is logged out and the log-in dialogue appears.

When the Administrator logs in for the first time, the password is **administrator**. If there is no access available, i.e. a user has not been created, the Administrator must create a new user and allocate the required authorisations. The Administrator also allocates the authorisations for access to programs and program areas.

5.2 Change password

The password can be changed in this dialogue.

5.3 Active users/licences

In network installations, the users that are logged in to Drägerware can be displayed here. For example, this is important for versions of Drägerware software with restricted licences.


5.3.1 Disconnect user

Users of a **Drägerware.Personnel Management "Basic"** network installation can be disconnected from the program with this menu item. If a user is disconnected, the program is automatically terminated for this user with a corresponding message.

6 Help menu


6.1 Help

Opens the user manual. The user manual can also be opened by pressing <F1>.

The  button in the tool bar also opens the user manual.

6.2 Info

A window with information about the program and the customer is displayed.

The  button in the tool bar also opens the info window.

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