

## PERSONNEL INFO SYSTEM



### Introduction

The Civil Service Commission's Memorandum Circular No. 8, s. 2007 entrusts the responsibility of institutionalizing the management of personnel files (201/120) to the agencies. The memorandum, likewise, recognizes that technological advancements will result to new and better ways of managing 201/120 files.

Responding to this call, the NEDA Region 1 Office (NRO 1) embarked on a project to automate the management of 201/120 files dubbed as the NEDA Personnel Information System (NPIS). The NPIS contains all required information in the 201/120 file and personal data sheet (PDS) that essentially provides an accurate and up-to-date personnel record. It is also a powerful tool for digital archiving of personnel records.

NPIS runs on a network and it stores data in one centralized database server using a file folder design that can be accessed online. With personnel records kept in a centralized system and the power of the online module, multiple users can gain instant access to the information they need and when they need it, saving them time and eliminating paper works. The online feature also allows quick and easy updating of employee records thus lessening the work of the Human Resource personnel.

It is a user-friendly management tool that streamlines the tasks of the HR personnel on updating personnel records, generation and printing of PDS, service records and the plantilla of positions and personnel in a CSC approved format.

Integrity and security of data are guaranteed through password protection, verification process and audit trail facility. It also makes use of security levels that define and limit access of authorized users.

NPIS is a component of the Integrated Personnel System (IPMs). The other components of the IPMS are the electronic Daily Time Record (eDTR) and the electronic payroll systems. The IPMS provides a more comprehensive management system of personnel.

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## Installing the Personnel **Information System**

- In this part, you will learn how to:

  ▲ Prepare your hardware

  ▲ Install the Personnel Module

  ▲ Kickstart NPIS on multiple computers

#### **Basic Hardware and Operating System Requirement**

Table 1 shows the basic hardware and software requirement to maximize the features of the NPIS. Since the NPIS runs on a network, it is vital to have a server and a reliable network connections. The HR PC, on the other hand, will require a Windows XP for its operating system (OS) because the Personnel System Module utilized VB as its programming platform. The workstations of the other users of the NPIS, particularly its Online Module, may use computers with lower specification and open source OS.

Table 1. Basic Hardware and Software Requirement

Server Core 2 Duo Processor

2 GB RAM

CD-ROM Optical Drive 160 GB Hard Disk Drive Windows XP or Ubuntu OS 100/1000 Mbps LAN Card

**UPS** 

HR PC Core 2 Duo Processor

1 GB RAM

CD-ROM Optical Drive 80 GB Hard Disk Drive

Windows XP OS

Mozilla Internet browser 100/1000 Mbps LAN Card

Workstations Pentium 4 Processor

512 MB RAM

40 GB Hard Disk Drive Windows XP or Ubuntu OS Mozilla Internet Browser 100/1000 Mbps LAN Card

#### **Installation Guide**

#### How to install NPIS in the Server

- 1. Install wamp server [web server = apache; database server = mysql; scription language = php]
- 2. From the taskbar icon, open mysql console and login using root password
- Using the assigned static IP addresses, grant privileges to the HR PCs with their own username and passwords ex. GRANT ALL ON personnel\_dtr.\* TO 'someuser'@'somehost' IDENTIFIED BY 'password';
- 4. Open windows firewall from the control panel
- 5. Add port 3306 to the exceptions, check file and printer sharing
- 6. Turn the firewall on
- 7. Open the wamp server folder
- 8. Paste the NPIS folder inside the WWW directory

#### How to install NPIS in the HR Computer

- 1. Install .net framework 1.0
- 2. Install .net framework 2.0
- 3. Install mysql connector Net
- 4. Install Personnel Module application

#### How to run NPIS in the Workstations

- 1. Open browser (mozilla)
- 2. Go to options[maybe preferences on other browser]
- 3. Go to content, on the "block pop-up windows"
- 4. Add the static ip of the server to the exceptions
- 5. On the address bar, type the static ip of the server followed by "/NPIS"
- 6. Bookmark the page

## Understanding the Personnel Module

- In this part, you will learn how to:

  ▲ Populate the database of the employees
   ▲ Prepare the Personnel Data Sheet

#### **Personnel System Module**

The Personnel System Module covers the management portion of the system. This module encompasses all the tasks of a Personnel Officer such as the management of the Peronal Data Sheets (PDS), service records and plantilla positions of employees.

Only authorized HR personnel are allowed to use this module. The Personnel Module is also protected with a password to ensure the security and integrity of data captured and generated by the system.

#### A. The Login Menu

#### 1. Login Window

 Upon running the Personnel System Module, the user is asked to enter his user name and password (Figure 1)

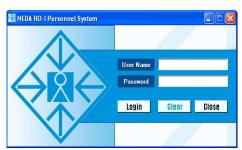


Figure 1. Login Window

#### 2. Valid Password

 Entering a valid username and password (Figure 2) allow the HR personnel to access the records of all employees

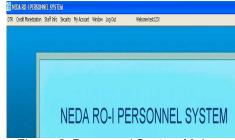


Figure 2. Personnel System Main Window

#### 3. Invalid Username and Password

 For invalid username and password, a message box will pop up to inform the HR personnel that

he has entered an invalid username and password (Figures 3 and 4)

• Click "OK" button to enter another username and password



Figure 3. Invalid Username



#### B. Staff Information Menu

The Staff Information menu is where the HR personnel will build-up the database on the PDS of employees, including new entrants/transferees from other government agencies. All personal and work-related information about an employee is inputted and updated in this menu.

#### Personal Data Sheeet (PDS)

The PDS has 7 major categories or submenus, namely: 1) Personal Information, 2) Work Related, 3) Family Background, 4) Educational Background, 5) Voluntary Work, 6) Training Programs, and 7) Questions/References.

While the "Pesonnel Module" can only be accessed by authorized HR personell, the system is designed to accept updates from individual employees using the "Online Module." The "Online Module" includes the information on educational background, voluntary works, and trainings. Employees should submit supporting documents as basis for approval by the HR personnel.

#### 1. Personal Information

- Select "PDS" in the Staff Info menu
- Enter all the data as required by the Personal Information window (Figure
   5). If the employee's photograph is already available, this can be attached by right-clicking the image section of the Personal Information window.
- Click the "Save" button to record all the entered data. A confirmation box will appear upon clicking the "Save" button (Figure 6) Click the "Clear" button located at the right bottom to build-up another record of employee.
- Existing records of staff can be edited by loading the record of the concerned employee. This can be done by selecting the division and ID number or name of the employee in the "Edit Existing Records" box located at the bottom of the PDS window.
- Click the "Update" button to save any changes.

#### 2. Family Background

- Click "Family Background" under the "Staff Info" menu (Figure 6)
- Enter a new employee record or update family record, namely: a) name of spouse and his/her occupation, b) parent's information, c) name and birthdate of children
- Click the "Save" button to save the new/updated record

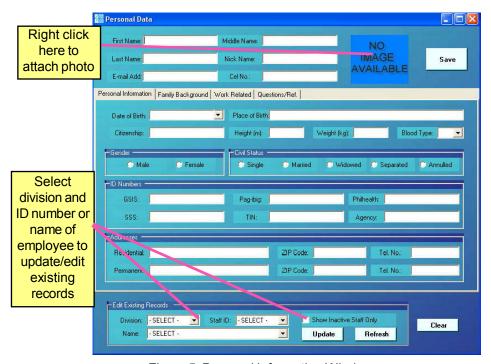


Figure 5. Personal Information Window

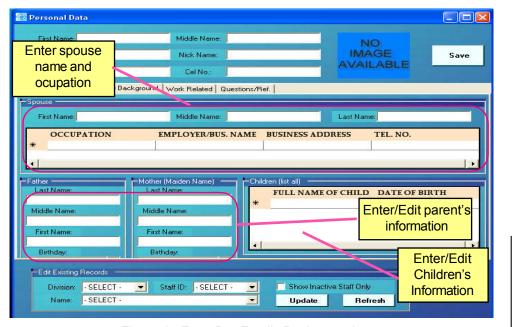


Figure 6. Entry Box Family Background

#### 3. Work Related Information

Work related information are further divided into three sets of major information, namely: 1) Work in NEDA, 2) Civil Service Eligibility, and 3) NPES Rating.

#### 3.1. Work in NEDA

- Select the "Work in NEDA" under the Work Related menu to enter or update record of employee (Figure 7)
- Fill-up the required data and information in the form
- Enter or Update employee's work experiences starting from the present employment following the prescribed format
- Click the "Save" button to save changes



Figure 7. Entry Box for Work in NEDA

#### 3.2. NPES Rating

- Click the tab on NPES Rating to enter or update the NPES record of an employee (Figure 8)
- Enter or edit information about the NPES rating of the employee

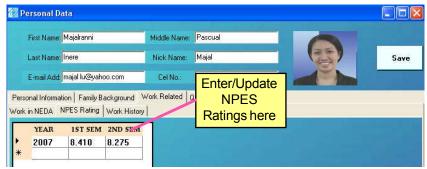


Figure 8. Entry Box for NPES Rating

 Click the "Save" button located at the upper right corner to update the record of the employee

#### 3.3. Work History

- Select the "Work History" under the Work Related menu to enter or update record of employee (Figure 9)
- Fill-up the required data and information in the form
- Enter or Update employee's work historystarting from the current employment following the prescribed format
- Click the "Save" button to save changes

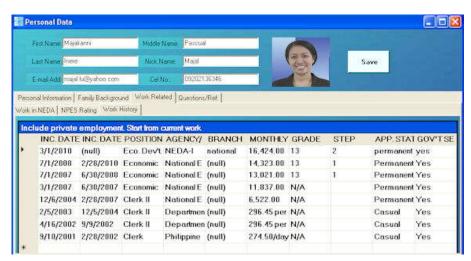


Figure 9. Entry Box for Work History

#### 4. Questions/References Submenu

- Click "Questions/References" under the "Staff Info" menu to open the entry box for the PDS-related questions and references (Figure 10)
- Answer the six sets of questions by ticking the appropriate answer. Provide details in the space provided for questions with "yes" answers
- Provide the name, address and contact number of references at the reference box
- Click the "Save" button to save changes

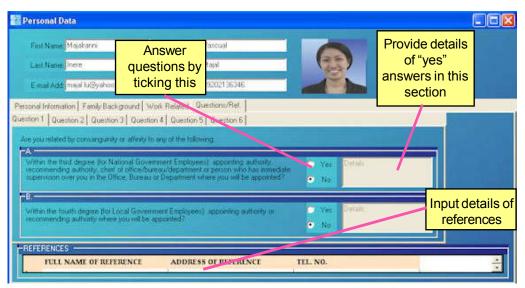


Figure 10. Entry Box for Questions and References

# Part 3

## Understanding the Online Module

In this part, you will learn how to:

- ▲ Populate your own 201/120 file
- ▲ Print your own Personnel Data Sheet
- ▲ Generate and print service records
   ▲ Generate reports on plantilla positions
- ▲ Manage user accounts

#### **Online Personnel Information**

The Online Module of Personnel Information System can be accessed through the network using an internet browser. All records entered into the Personnel Information System can be accessed and/or updated online.

The security levels for users are applied in this module, which means that the HRD personnel will have access to other information which may not be accessible for a rank-and-file employee, such as the a) Item Details, b) Staff Item, c) Service Record, and d) Personnel Plantilla.

#### A. The Online Login Menu

#### 1. Login Window

- Enter the assigned IP address (to be provided by the System Administrator) of the Online Module of the Personnel Information in the internet browser (Bookmark the webpage for easier access in the future)
- Click the "Login" menu to open the Login W indow (Figure 11)
- Enter username and password

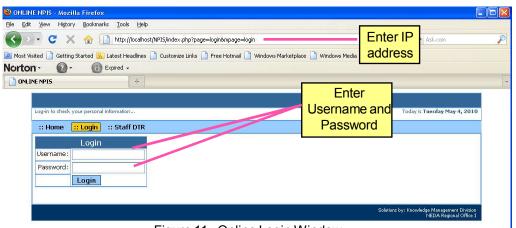


Figure 11. Online Login Window

#### 2. Valid Password

 Entering a valid username and password allows the user to access his/ her records. The HR personnel on the other hand can access the records of all employees other than his own.

#### 3. Invalid Username and Password

- A message box (Login Error) will pop up to inform the the user on the invalid entry of username and password (Figure 12)
- The user is advised to check the accuracy of his/her entries
- Click "OK" button to enter another Figure 12. Login Error Message username and password

#### !!! Login Error !!! Please try again and check the following: · You have an account that you know the username You have provided the correct password OK

#### B. The Online Module Menu

The online module for employees have the following menu in the home window: 1) My PDS Related Files, 2) My 201 Files, 3) Print PDS, 4) Staff DTR, 5) My Account, and 6) Log-out. Although the employees can update their PDS related files, their entries will have to be verified and validated by the HR personnel vis-a-vis the supporting documents submitted by the employee before they are considered official or approved.

#### **B.1. My PDS Related Files**

There are eight types of personnel information found in the PDS Related Files (Table 2).

#### Table 2. Type of PDS Related Files

- · Education
- · Training
- Work Experience
- Other Information

- Recognition
- Eligibility
- Voluntary Work
- Reference

This can be accessed by clicking the My PDS Related menu. The window for basic and other PDS-related information will prompt upon clicking the tab on My PDS Related menu. While most of the data found in the basic information window cannot be edited/updated, the data on the Contact and Family Information could be edited/updated online by the employee subject to the verification of the HR personnel.

#### How to add a new record on PDS Related Files\*

- Click the tab of the desired PS Related Files to be appended
- Click the "Add" button to open entry window for a new record (Figure 13)
- Enter all the required data/information
- Attach the scanned copy of document if available
- Click the "Save and Exit" button to save the newly entered record
- Notice that the newly entered record will appear in the Education Window, but will be classified as "no" in the approval status, which will require verification and approval of the HR personnel

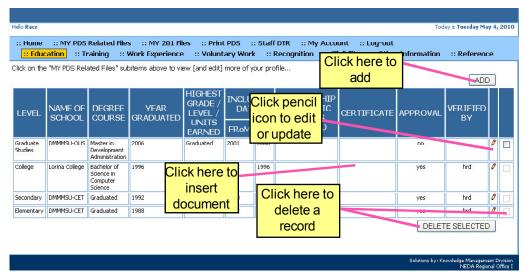


Figure 13. My PDS Related Files Window

#### How to edit a record on PDS Related Files\*

- Click the pencil icon
- Make the necessary updates
- Click the "Save & Exit" button to save the edited record
- Since the record has been edited, the approval status of the said record will revert back to "no", which, will require verification and approval of the HR personnel

<sup>\*</sup> Interface may vary for each type of personnel information

#### How to delete a record on PDS Related Files\*

All entries without the approval and verification of the HR personnel can be deleted.

- Select the record by clicking the check box
- Click the "Delete Selected" button
- A confirmation box will appear upon clicking the delete button (Figure 17)
- Choose "OK" to delete the record, and "no" to cancel deleting the selected record

#### How to view attached documents\*

• Click the document under the column on "Certificate" to open the attached document

#### **B.2.** My 201 Files

The contents of the My 201 File is based on CSC Memorandum Circular No. 8, s. 2007 (Annex 1), which enhances the policy on management of 201/120 files.

#### Table 3. Contents of 201/120 Files

- Special Orders
- Disciplinary Action
- Service Contract

- NBI Clearance
- Medical Certificate
- Other Documents

#### How to add a new record on 201/120 Files\*

- Open the tab of the 201/120 Related Files
- Click the "Add" button at the upper right corner to open entry window for a new record (Figure 14)
- Enter all the required data/information
- Click the "Save and Exit" button to save the newly entered record
- Notice that the newly entered record but will be classified as "no" in the approval status subject verification and approval of the HR personnel

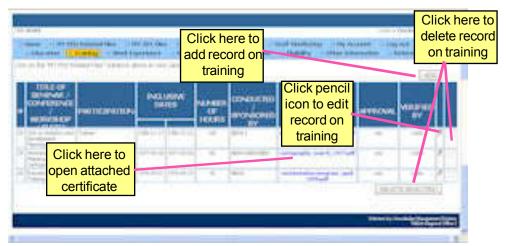


Figure 14. 201/120 Related Files

#### How to edit a record on 201/120 Files\*

- Click the pencil icon of the record to be edited
- Make the necessary updates (Figure 14)
- Click the "Save & Exit" button to save the edited record
- Since the record has been edited, the approval status of the said record will revert back to "no" which will require the verification and approval of the HR personnel

#### How to delete a record on 201/120 Files\*

- Select the record to be deleted by clicking the check box (see Figure 43)
- Click the "Delete Selected" button
- A confirmation box will be loaded upon clicking the delete button (Figure 46)
- Choose "OK" to delete the record and "no" to cancel deleting the selected record

<sup>\*</sup> Interface may vary for each type of personnel information

#### **B.2 Print PDS Menu**

The Print PDS menu allows the user to print his/her own PDS in CSC prescribed format. It is vital to check whether all data inputted in the system are approved and verified for the PDS will only print HR approved and verified data. The PDS have four parts that will contain personal and other pertinent information about the employment and training of the employee.

- Go to Print PDS menu (Figure 15)
- Click each part of the PDS to load the printer-friendly version
- Go to File Menu and select "Print" to send the document to the default printer of the computer
- Follow the same steps to print other parts of the PDS

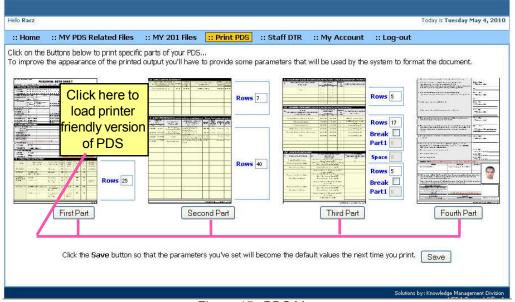


Figure 15. PDS Menu

#### **B.3 Item Details Menu**

The Item Details menu provides the item number of the roster of employees based on the Personal Services Itemization and Plantilla of Personnel (PSIPOP). It shows in detail the unique item number of the position, position title, salary grade as well as salary step.



Contents of this menu are sensitive as it has financial concerns that affects the salary of the employee and the Personal Services budget of the office, hence, this menu is for the HR Personnel only. The Item Details Menu have 2 menu items, namely: a) Position Item, and b) Staff Item.



Figure 16. Item Details

#### How to add a record on Item Details

- Go to Item Details menu (Figure 16)
- Click the Add button
- Enter all required information
- Click the "save and exit" button to save changes
- Follow the same steps to add records on "Staff Item"

#### How to view/update a record on Item Details

- Go to Item Details menu
- Click the tab on "Position Item"
- Select the employee's division assignment to view or update record
- Click the pencil icon of the employee to open his/her record
- Make the necessary adjustments/corrections
- Click the "save and exit" button to save changes
- Follow the same steps to view/update records on "Staff Item"

#### How to delete a record on Item Details

- Select the record(s) on position item to be deleted by ticking the check box found at the last column of the list
- Click the "Delete Selected" button at the lower right corner of the window
- A confirmation box will be loaded upon clicking the delete button
- Choose "OK" to delete the record and "no" to cancel deleting the selected record

#### **B.4 Staff Monitoring Menu**

The Staff Monitoring menu allows the HR Personnel to view and update an employee's record on his/her profile, PDS, service record, personnel plantill, and staff DTR.

#### B. 4.1 Staff Profile Menu

The employee's profile can be viewed/updated using the Staff Profile menu under the Staff Monitoring menu. The employee's profile includes the following set of information

- a. Basic Information
- b. Educational Background
- c. Trainings Attended
- d. Work Experience
- e. Voluntary Work
- f. Distinction/Recognition
- g. Eligibility

- h. Reference
- i. Special Order
- j. Disciplinary Action
- k. Service Contract
- Medical Certificate
- m. NBI Clearance
- n. Other Documents

#### How to view/update record on Staff Profile

- Go to the Staff Monitoring menu
- Click the "Staff Profile" submenu (Figure 17)
- Select the employee's division assignment
- Select the name of the employee
- Choose specific profile to view/update from the list provided
- Make the necessary adjustments/corrections



#### For HR Personnel only



Figure 17. Staff Profile

- Click the "save and exit" button to save changes
- Follow the same steps to view/update records on the profile of the employee

#### B. 4.2 Staff PDS Menu

PDS of employees can be printed by the HR Personnel through the Staff PDS menu under the Staff Monitoring menu.

• Follow the same steps on printing PDS in the Print PDS Menu (B.2)

#### B. 4.3 Service Record Menu

Part of human resource management is the maintenance of the employment history or service record (private or public) of each employee. The service record can be viewed and printed in the Service Record Menu.

- Go to the Service Record Menu (Figure 18)
- Select the employee's division
- Load employee's Service Record by choosing his/her name from the list
- Click the "Print Preview" button to load the printer-friendly version
- Go to File Menu and select "Print" to send the document to the default printer

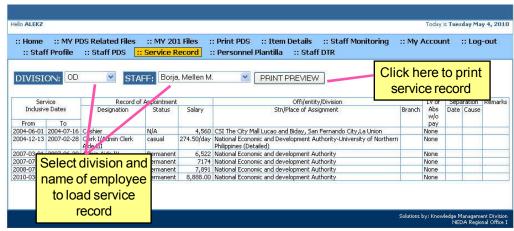
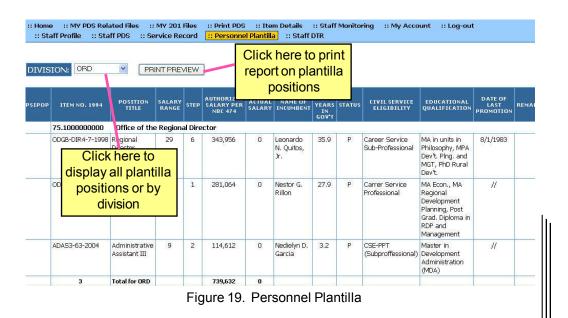


Figure 18. Service Record

#### B. 4.4 Personnel Plantilla Menu

The Personnel Plantilla Menu allows the HR Personnel to print the Plantilla of Positions of the office. It shows in detail the Position Item, Position Title, Salary Grade and Step, Authorized Salary per NBC 474, Actual Salary, Name of Employee, Number of Years in Government, Status, Employmen Status, Civil Service Eligibility, Educational Qualification, Date of Last Promotion, and



Remarks. The printed plantilla of positions follows the prescribed format of the CSC.

- Select the division or choose "Select All" to view/print plantilla of positions of all employees (Figure 19)
- Click the "Print Preview" button to load the printer-friendly version
- Go to File Menu and select "Print" to send the document to the default printer

## B. 4.5 Staff DTR Menu



The Staff DTR Menu is the daily logbook of the employees, which serves as online locator of employees that can be accessed using an internet browser. It is also essential for the HR Personnel for tracking the whereabouts of the employees even on the previous dates.



Figure 20. Staff DTR



Requires eDTR installation

• Specify the date of the logbook to be viewed by clicking the calendar icon (Figure 20)

#### C. My Account Menu

- Select "Change Password" in the My Account menu to change and update the password.
- Enter the necessary data in the Change Password Window (Figure 21)
- Click the "Save & Exit" button to execute the command



Figure 21. Change Password Window

#### D. Log Out Menu

• Click the "Logout" menu to exit from the online system.

# Part 4

## **Annexes**

▲ CSC Memorandun Circular No. 8, s. 2007

MC No. 8, s. 2007

#### **MEMORANDUM CIRCULAR**

TO: ALL HEADS OF CONSITUTIONAL BODIES, DEPARTMENTS, **BUREAUS, AND AGENCIES OF THE NATIONAL GOVERNMENT;** LOCAL GOVERNMENT UNITS; GOVERNMENT-OWNED OR **CONTROLLED CORPORATIONS WITH ORIGINAL CHARTERS:** AND STATE UNIVERSITIES AND COLLEGES

#### SUBJECT: Management of 201/120 Files

The Civil Service Commission in CSC Resolution No. 070881 dated May 8, 2007, prescribes the rules and regulations in the Management of 201/120 files.

The CSC as the central personnel agency of government responsible for policies in human resource management continuously reviews its policies to guide actions of people in the bureaucracy. The Commission, in the review of its 201/120 file policies finds the following:

- 1. The length of time an agency keeps 201/120 files of its separated or retired personnel is 25 years and up to age ninety (90) of the individual. As a result it brought about problems of space, personnel, maintenance and safety.
- 2. The government maintains an additional one-third of its total present personnel files for separated/retired officials and employees thus resulting to maintenance and monetary burden on agencies and units;
- 3. Registries show the minimal number of requests for retrieval and access of documents from retired or separated officials and employees of their personnel file with the agency or the CSC thus, raising the issue of its value.
- 4. At present, there is no provision on maintenance responsibility of employees in or out of government service.
- 5. There are new and better methods of records management.

CSC Resolution No. 070881 s. 2007 enhances the policy on management of 201/120 files. The resolution aims to:

1. Adapt to changes in the technological environment.

- 2. Prepare for the realization of the E-Commerce Law.
- 3. Establish a new lifespan for the 201/120 files to enhance management of active and inactive files by facilitating the retrieval and access of frequently asked records.
- 4. Define responsibilities and accountabilities for 201/120 files during employment and after separation on an employee.
- 5. Further give value to employees and instill pride for working in government.
- 6. Reduce the number of 201/120 files to a manageable level to be more responsive to current and personnel needs.
- 7. Be responsive to budgetary problems faced by agencies due to expensive maintenance cost.
- 8. Prevent possible destruction to government documents/properties due to natural or man-made hazards/calamities.

Therefore, all agencies and units of government shall be guided by the following policies:

- The Head of Office in charge of Human Resource Management, shall:
  - 1. Be responsible for the establishment, maintenance and disposal of 201/120 file of each personnel in their respective agencies which consist of copies of the following documents:
    - a) Appointments [CSC Form 33 (1985)]
    - b) Assumption of Duty
    - c) Certification of Leave Balances (for transferees)
    - d) Clearance from Property and Money Accountabilities (for transferees)
    - e) Contracts of Services (if applicable)
    - f) Copies of Certificates of Eligibilities
    - g) Copies of Diplomas, Commendations and Awards
    - h) Copies of Disciplinary Actions (if any)
    - i) Copy of Marriage Contract (if applicable)
    - j) Designations
    - k) Medical Certificate [CSC Form 211 (1997)]
    - I) NBI Clearance
    - m) Notice of Salary Adjustments/Step Increments
    - n) Oaths of Office
    - o) Personal Data Sheet [CSC Form 212 (2005)]

#### p) Position Description Forms

- Provide the personnel concerned with original copies of the agency and CSC approved appointments as well as duplicate/ machine copies of documents in the 201/120 file for their own record.
- 3. In case of transfer of an employee to another agency, effect the turnover of the employee's 201/120 folder to the new employing agency or unit through the employee.
- 4. In case of voluntary resignation, turnover the agency copy of 201/ 120 file to the resigned employee who shall thereafter assume responsibility for said file.
- 5. In case of retirement of an employee in good standing, give the agency 201/120 folder to the retiree which shall serve as a memoir. The retired employee shall thereafter assume responsibility for safekeeping. An employee in good standing is one who has no pending administrative case with the agency/CSC/Ombudsman and has been cleared of money and property accountabilities.
- 6. Prepare and submit a monthly report of employee accession and separation duly signed by the Head of Office to the Field and Regional Offices of the Commission.
- Keep copies of the Statement of Assets, Liabilities and Net Worth (SALN) of retired/separated employees for a period of ten (10) years and their Personal Data Sheet and Clearance from Property and Monetary Accountabilities for five (5) years.
- 8. Effect disposal of 201/120 files of retired or separated personnel in accordance with the provisions of this Memorandum Circular.

#### II. The Government Personnel, shall:

1. Assume full responsibility for keeping and maintaining a complete 201/120 file with the original copies of one's appointments approved by both the agency/unit and the CSC.

- 2. Upon transfer, request for one's complete 201/120 folder maintained by the agency/unit and assume responsibility for its conveyance to the new agency/unit.
- 3. Upon separation or retirement, assume responsibility for safekeeping of 201/120 file.

Please be guided accordingly.

(SGD) KARINA CONSTINO-DAVID Chair