



16 December 2021

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# T&A Worker Setup

## Time and Attendance

**Terra Industrial New Zealand Ltd**

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# This is a three-part process

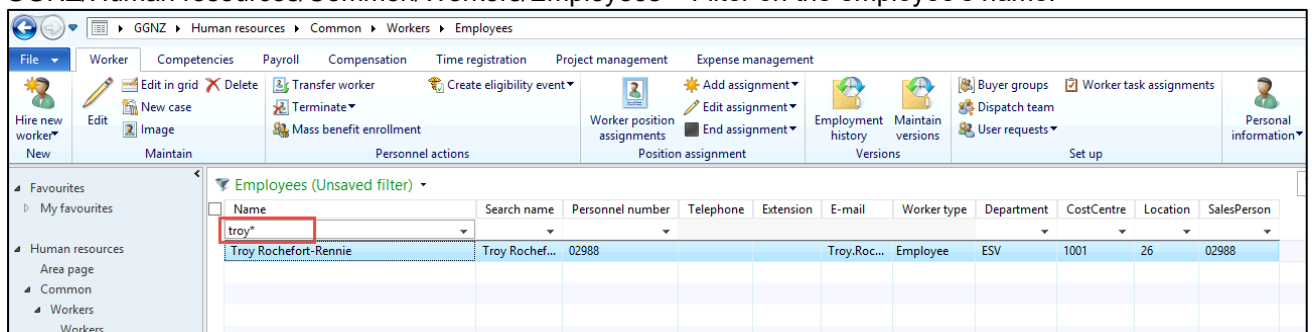
Advice: practise in Sandbox first & get Sue P to double check things over 😊

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## Part One – Setting up time registration on worker

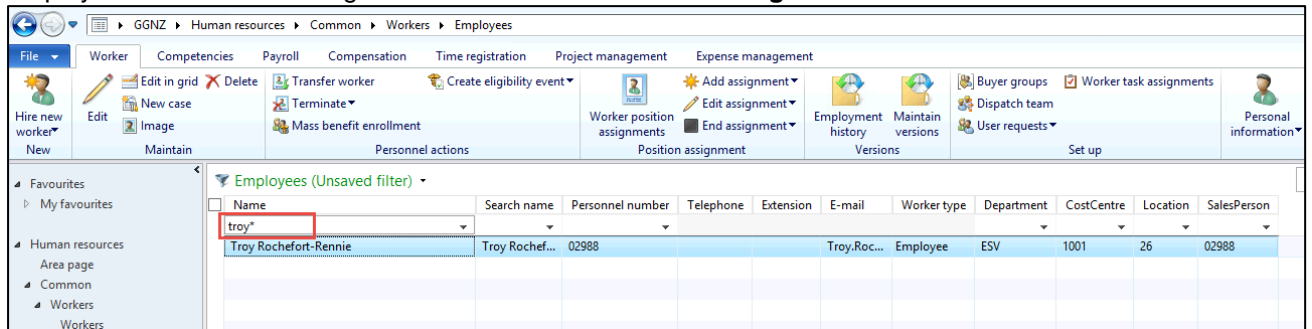
- The T&A setup for a worker in Naxt is as follows – You will need the following information.
  - Cost Centre =
    - 1001 = Main shop
    - 1002 = Field Service
    - 1003 = Truck Shop
    - 1004 = Spec Shop
  - Division = ESV.
  - Location = 60, 21
  - Job Title = Heavy Diesel Tech.
  - Pay Rate = See end of document for rates
- GGNZ/Human resources/Common/Workers/Employees – Filter on the employee's name.



Name	Search name	Personnel number	Telephone	Extension	E-mail	Worker type	Department	CostCentre	Location	SalesPerson
Troy Rochefort-Rennie	Troy Rochef...	02988			Troy.Roc...	Employee	ESV	1001	26	02988

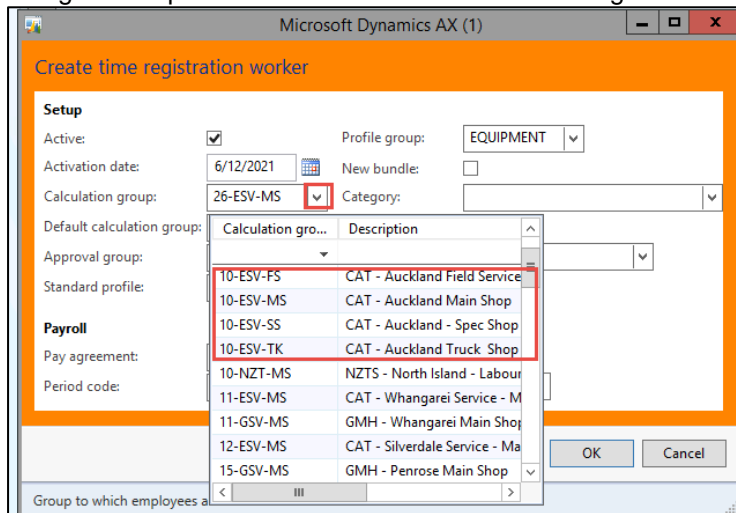
- Double click to open.

#### 4. Employment TAB – Time Registration – Click on **Activate on Registration**



Name	Search name	Personnel number	Telephone	Extension	E-mail	Worker type	Department	CostCentre	Location	SalesPerson
Troy Rochefort-Rennie	Troy Rochef...	02988			Troy.Roc...	Employee	ESV	1001	26	02988

5. Populate the following areas with the correct data for the location of the employee.
6. Using the Drop-down box to select the correct configuration.



**Setup**

Active: ☒ Profile group: EQUIPMENT

Activation date: 6/12/2021 New bundle: ☐

Calculation group: 26-ESV-MS Category:

Default calculation group:

Approval group:

Standard profile:

**Payroll**

Pay agreement:

Period code:

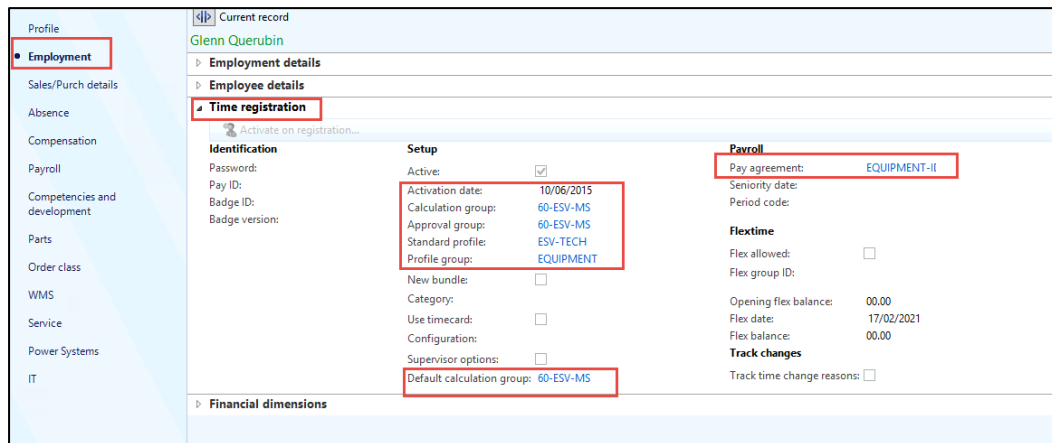
Group to which employees are assigned:

Calculation group list:

Calculation group	Description
10-ESV-FS	CAT - Auckland Field Service
10-ESV-MS	CAT - Auckland Main Shop
10-ESV-SS	CAT - Auckland - Spec Shop
10-ESV-TK	CAT - Auckland Truck Shop
10-NZT-MS	NZTS - North Island - Labour
11-ESV-MS	CAT - Whangarei Service - M
11-GSV-MS	GMH - Whangarei Main Shop
12-ESV-MS	CAT - Silverdale Service - Ma
15-GSV-MS	GMH - Penrose Main Shop

- a. Activation Date = the start date of their employment – **do not do the date in advance as it causes issues. Set up T&A on the day the worker starts.**
- b. Calculation Group = 10=Location-ESV=Service-MS=Main Shop Depends on the Cost centre from Financial Dimensions – **see page 1**
- c. Default Calculation Group = Same as Calculation Group
- d. Approval Group – Same as Calculation Group
- e. Standard Profile = ESV-TECH (This may be different if they are on roster or work in Mine).
- f. Pay Agreement = Equipment-ID
- g. Profile Group = EQUIPMENT (This may be different if they are on roster or work in Mine). Check the similar user to help
- h. New Bundle – Remove the Tick

i. Select OK.



**Current record**  
Glenn Querubin

**Employment details**

**Employee details**

**Time registration**

Activate on registration...

**Identification**

Pay ID:   
 Badge ID:   
 Badge version:

**Setup**

Active: ☒   
 Activation date: 10/06/2015   
 Calculation group: 60-ESV-MS   
 Approval group: 60-ESV-MS   
 Standard profile: ESV-TECH   
 Profile group: EQUIPMENT   
 New bundle: ☐   
 Category:   
 Use timecard: ☐   
 Configuration:   
 Supervisor options: ☐   
 Default calculation group: 60-ESV-MS

**Payroll**

Pay agreement: EQUIPMENT-II   
 Seniority date:   
 Period code:

**Flextime**

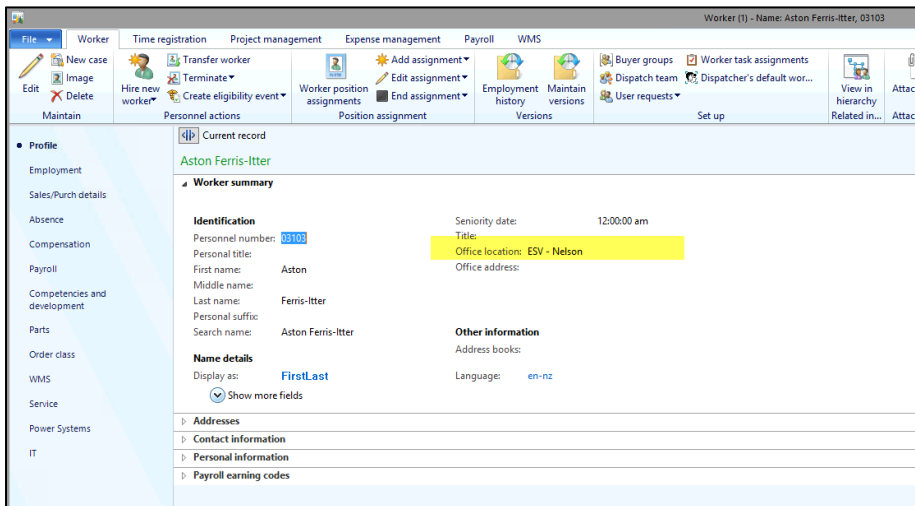
Flex allowed: ☐   
 Flex group ID:   
 Opening flex balance: 00.00   
 Flex date: 17/02/2021   
 Flex balance: 00.00

**Track changes**

Track time change reasons: ☐

**Financial dimensions**

7. Make sure the location is stated on the worker



**Worker (1) - Name: Aston Ferris-Iltter, 03103**

**Worker summary**

**Identification**

Personnel number: 03103   
 Personal title:   
 First name: Aston   
 Middle name:   
 Last name: Ferris-Iltter   
 Personal suffix:   
 Search name: Aston Ferris-Iltter

**Seniority date:** 12:00:00 am   
 Title:   
 Office location: **ESV - Nelson**   
 Office address:

**Other information**

Address books:   
 Language: en-nz

**Name details**

Display as: FirstLast   
 Show more fields

**Addresses**

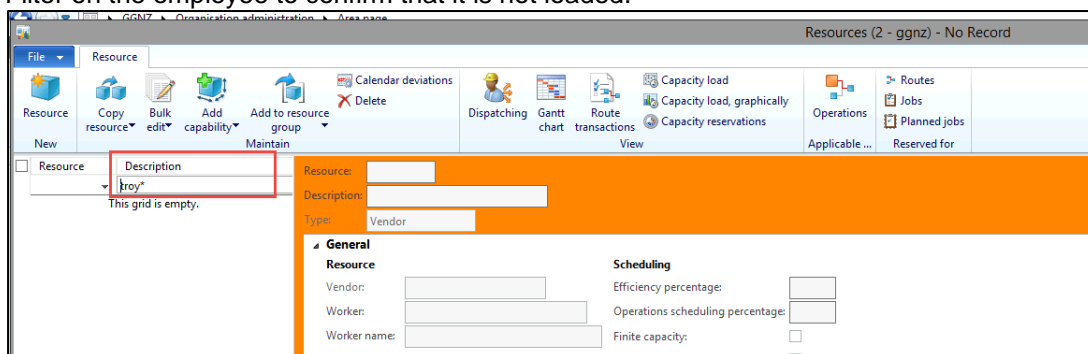
**Contact information**

**Personal information**

**Payroll earning codes**

## Part Two – Setting up the worker resource record

- GGNZ/Organisation administration/Common/Resources/Resources – open.
- Filter on the employee to confirm that it is not loaded.



**Resources (2 - ggnz) - No Record**

**Resource**

Resource:   
 Description: Iroy\*   
 Type: Vendor

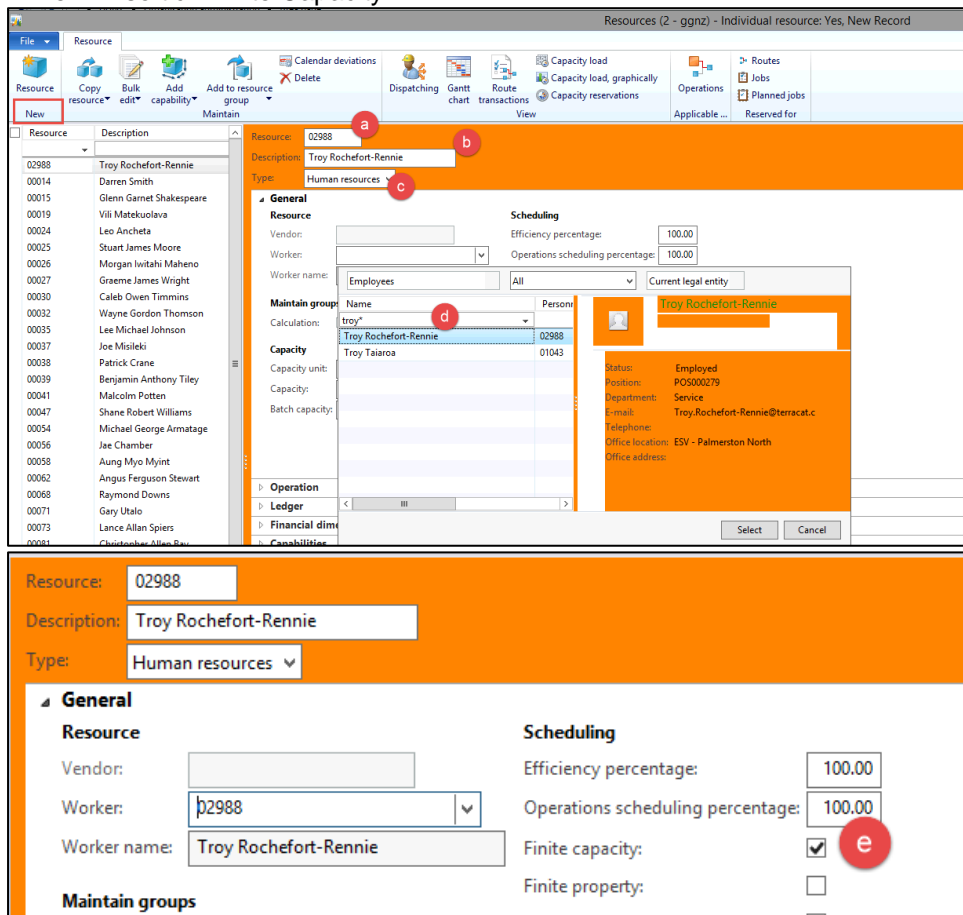
**General**

Resource:   
 Vendor:   
 Worker:   
 Worker name:

**Scheduling**

Efficiency percentage:   
 Operations scheduling percentage:   
 Finite capacity: ☐   
 Finite capacity:

3. Select **Resource** – Populate the following:
  - a. Staff Number.
  - b. Staff name.
  - c. Select Human Resource.
  - d. Filter to find worker and select.
  - e. Also tick Finite Capacity.



Resources (2 - ggnz) - Individual resource: Yes, New Record

File Resource

Resource: 02988

Description: Troy Rochefort-Rennie

Type: Human resources

**General**

Resource

Vendor:

Worker: 02988

Worker name: Troy Rochefort-Rennie

**Scheduling**

Efficiency percentage: 100.00

Operations scheduling percentage: 100.00

Finite capacity: ☒

Finite property: ☐

**Maintain groups**

4. Financial Dimension – populate as per the Financials Dimensions on the Worker Setup.
  - a. Cost Centre = 1001
  - b. Department = ESV
  - c. Division = ESV
  - d. Location = Branch

e. Salesperson = Staff Number (02988)

**Financial dimensions**

Default financial dimensions Where the

a	Contract:		▼ No default
b	CostCentre:	1001	▼ EQU - Mainshop
c	Department:	ESV	▼ Service
d	Division:	ESV	▼ Service
	Equipment:		▼ No default
	Location:	26	▼ Palmerston North (CAT & GMH)
	ProductGroup:		▼ No default
	ProductionID:		▼ No default
	ProjectID:		▼ No default
e	SalesPerson:	02988	▼ Troy Rochefort-Rennie

5. Resource Group will be the same as the one in the approval Group at T&A Setup. You populate the calendar that is assigned to the group. Close

**Resource groups** ✖

➕ Add ✖ Remove ✎ Edit 🔍 View

Resource gr...	Expiration	Calendar	Input wareh...	Input location
26-ESV-MS	Never	▼		

Select View > All to view and/or ma

Calendar Name

RENTAL_30	Rental calendar 30 days for BRC
SOUTHLAND	Invercargill
STH CANT	Timaru
TARANAKI	New Plymouth
T-NZBASE	Base New Zealand Days (8.50 H
WELLINGTON	Wellington, Masterton, Palmers
WESTLAND	Greymouth
WORKWEEK_5	Work week 5 days calendar

ntly effective

6. Below are the names of the locations that come under the calendars

Working time calendars (1 - ggnz) - Calendar: WELL

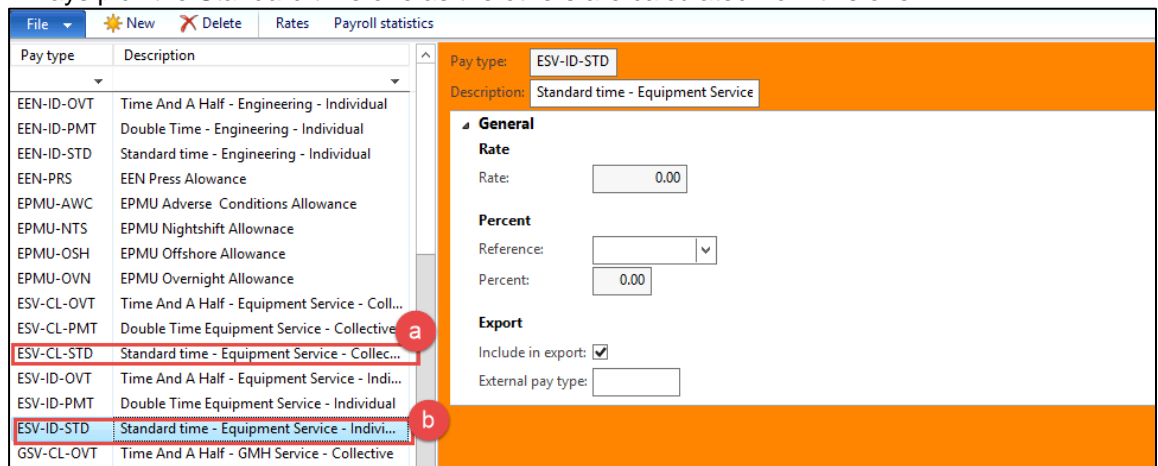
File 🌟 New ✖ Delete Working times Copy calendar

Overview **General**

Calendar	Name	Base calendar	Service calendar
ABSENT	Every Day Absent		<input checked="" type="checkbox"/>
AUCKLAND	Auckland , Whangarei, Silverdale, Pukekohe, Hamilton, Tauranga, Rotorua, Gisborne	E-NZBASE	<input checked="" type="checkbox"/>
CANTERBURY	Christchurch	E-NZBASE	<input checked="" type="checkbox"/>
E-NZBASE	Base New Zealand Days (8 Hours)		<input checked="" type="checkbox"/>
HAWKES BAY	Napier, Hastings	E-NZBASE	<input checked="" type="checkbox"/>
MARLBOROUGH	Blenheim	E-NZBASE	<input checked="" type="checkbox"/>
NLSN/BULLR	Nelson, Westport	E-NZBASE	<input checked="" type="checkbox"/>
OTAGO	Dunedin	E-NZBASE	<input checked="" type="checkbox"/>
RENTAL	Rental calendar for BRC	WORKWEEK_5	<input type="checkbox"/>
RENTAL_30	Rental calendar 30 days for BRC	E-NZBASE	<input type="checkbox"/>
SOUTHLAND	Invercargill	E-NZBASE	<input type="checkbox"/>
STH CANT	Timaru	E-NZBASE	<input checked="" type="checkbox"/>
TARANAKI	New Plymouth	E-NZBASE	<input checked="" type="checkbox"/>
T-NZBASE	Base New Zealand Days (8.50 Hours)		<input checked="" type="checkbox"/>
WELLINGTON	Wellington, Masterton, Palmerston North	E-NZBASE	<input checked="" type="checkbox"/>
WESTLAND	Greymouth	E-NZBASE	<input checked="" type="checkbox"/>
WORKWEEK_5	Work week 5 days calendar		<input type="checkbox"/>

## Part Three – Setting up the worker’s pay rate

1. Select - GGNZ/Human resources/Setup/Time and attendance/Payroll/Pay Types – you will select either of the two below.
  - a. ESV-CL-STD represents Collective Agreement (Union)
  - b. ESV-ID-STD represents Individual Agreement. – **most of the it is usually this one**
  - c. Always pick the Standard time one as the others are calculated from this one.



Pay type	Description
EEN-ID-OVT	Time And A Half - Engineering - Individual
EEN-ID-PMT	Double Time - Engineering - Individual
EEN-ID-STD	Standard time - Engineering - Individual
EEN-PRS	EEN Press Allowance
EPMU-AWC	EPMU Adverse Conditions Allowance
EPMU-NTS	EPMU Nightshift Allowance
EPMU-OSH	EPMU Offshore Allowance
EPMU-OVN	EPMU Overnight Allowance
ESV-CL-OVT	Time And A Half - Equipment Service - Collective
ESV-CL-PMT	Double Time Equipment Service - Collective
ESV-CL-STD	Standard time - Equipment Service - Collective
ESV-ID-OVT	Time And A Half - Equipment Service - Individual
ESV-ID-PMT	Double Time Equipment Service - Individual
ESV-ID-STD	Standard time - Equipment Service - Individual
GSV-CL-OVT	Time And A Half - GMH Service - Collective

Pay type: **ESV-ID-STD**

Description: **Standard time - Equipment Service**

**General**

**Rate**

Rate:

**Percent**

Reference:

Percent:

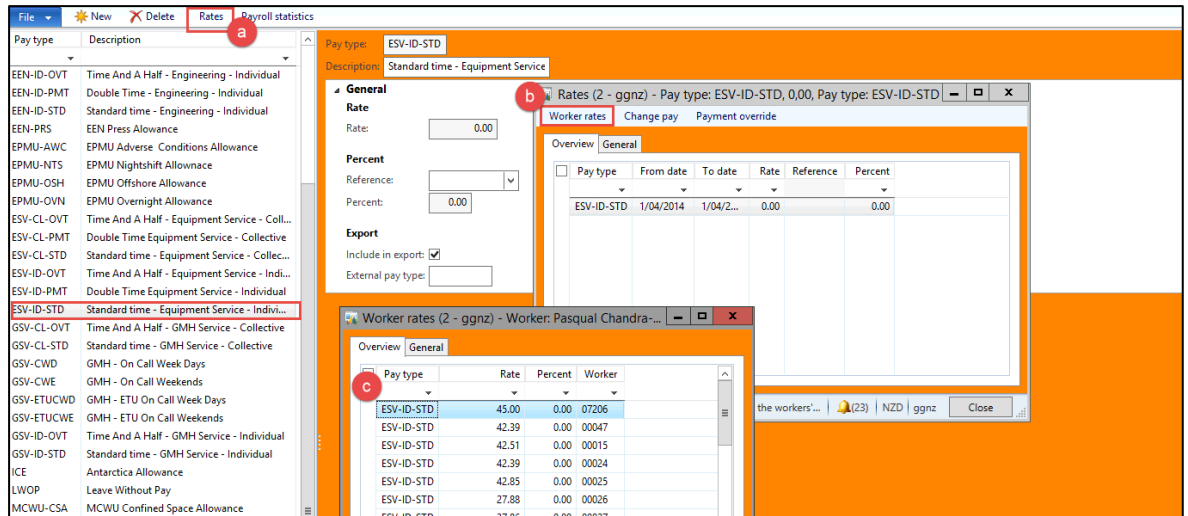
**Export**

Include in export: ☒

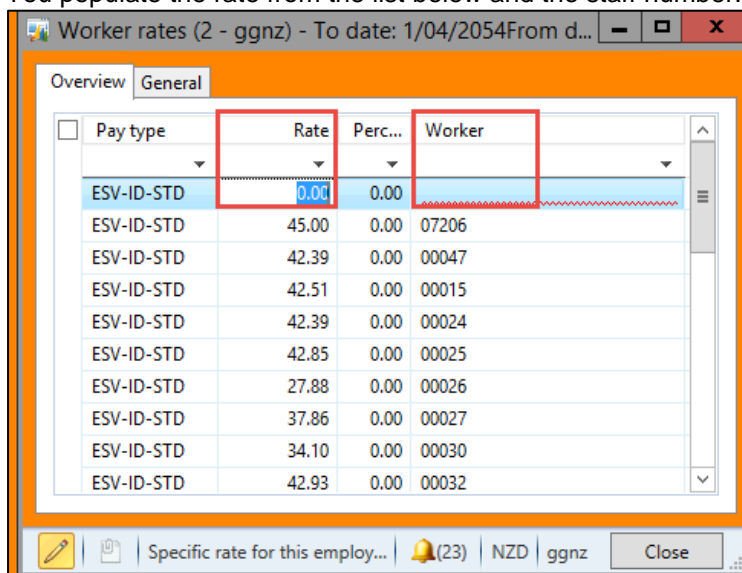
External pay type:

2. Select the pay type:
  - a. Rates.
  - b. Worker Rates.

c. Control N = new line.



3. You populate the rate from the list below and the staff number.



This is the list to use for rates. If however the employee has a new title that isn't listed, consult Jimmy La for what their pay rate should be.



Position title	AVE NAXT RATES	
Apprentice	\$	22.70
Automotive Electrician	\$	35.31
Electrical and Installation Technician	\$	42.39
EPG Technician	\$	42.39
Fitter Welder	\$	35.31
Heavy Diesel Field Service Technician	\$	37.86
Heavy Diesel Field Service Technician Electrical	\$	37.86
Heavy Diesel Field Service Technician EPG	\$	37.86
Heavy Diesel Field Service Technician Lube Truck	\$	37.86
Heavy Diesel Field Service Technician Marine	\$	37.86
Heavy Diesel Resident Field Service Technician	\$	37.86
Heavy Diesel Technician	\$	36.64
Heavy Diesel Technician Senior	\$	37.86
Hose Build and Maintenance Technician	\$	32.52
Lead Hand	\$	42.39
Lead Hand Heavy Diesel Technician	\$	42.39
Lube Truck Technician	\$	35.56
Skills Upgrade Technician	\$	32.13
Trades Assistant	\$	25.20

Ps. Service Specialist is the new name for Lube Truck Technician

**Close all screens.**