



**Rzeczpospolita
Polska**

Unia Europejska
Fundusz Spójności



Agreement partially co-financed by the European Union funds

Beneficiary's Manual

SL2021 - Personnel Base

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1. Introduction

The Personnel Base Module allows beneficiaries to manage information about the people involved in the project.

You can complete the data within the Personnel Base as soon as the project status in the system changes to "Contract signed".

- **In the Personnel Base, information should be recorded on persons engaged to work on the project, if their remuneration is settled by actual expenditure or a unit rate.**
- **Data on a person involved in the project should be registered in the database before a payment claim that takes into account the costs incurred in connection with that person's participation in the project is submitted.**

You can complete the data in the Base directly in the system or by importing data from an xlsx template.

2. Personnel Base

2.1 Access to the Module

Each beneficiary's user has access to the Personnel Base.

To access the module on the project bar, select the 3 dots icon and then select *Personnel base* in the context menu.

The screenshot shows a project bar for 'STHB.04.01-IZ.00-0003/23'. The bar contains a table with the following data:

Title	Applicant
WOD2021 webinar test project	MI6
Eligible expenditure	Co-financing
29 130,00	23 304,00
Status	Date of the last modification
Contract signed	2024-10-28 08:57:40

A context menu is open on the right side of the bar, listing the following options: Project details, Project settlement (highlighted with a red box), Payment claims, Payment schedule, Personnel base (highlighted with a red box), Public procurements, and Correspondence.

2.2 Personnel list preview

To view the list of personnel registered in the project, select the 3 dot icon on the project bar and then select *Personnel base* in the context menu.

On each Personnel tab, the following data are shown on the list:

- Name
- Surname
- Form of involvement
- Status
- Period of involvement

Personnel base

MANAGING THE PERSONNEL ▾

PROJECT IMPLEMENTATION ▾

Number of results: 1

Search for personnel

Items per page:
10 ▾

Filtering and sorting panel ▾

ULF FEDERIKSEN



Name
ULF

Surname
FEDERIKSEN

Form of involvement
Stosunek pracy

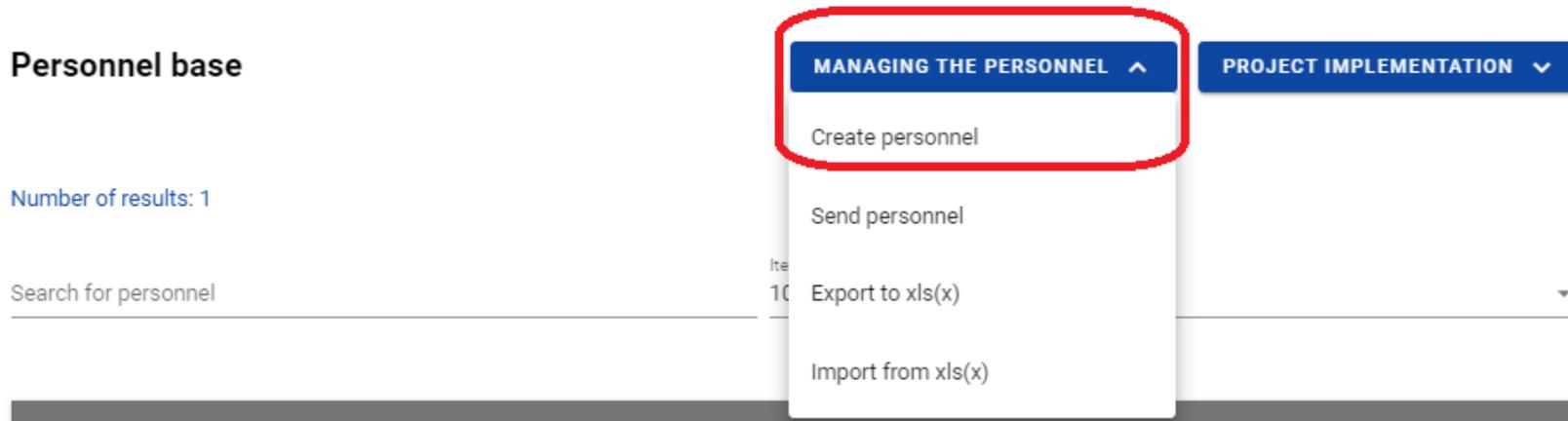
Status
In preparation

Period from
2024-01-01

Period until
2024-02-29

2.3 Creation of the Personnel

To create personnel, go to the Personnel Base and then select the *Create personnel* function in the Managing the Personnel menu.



Using this function allows a form to be displayed to complete the data.

Creating personnel

PROJECT IMPLEMENTATION ▾

Personnel details

Country
Polska ▾ PESEL

Name _____ Surname _____

Form of involvement ▾

Period from _____ Period until _____

Notes

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On the form screen, you will see a number of fields that need to be completed.

Country - Single-choice field.

PeSEL - PESEL identifier or other identifier (applies to personnel coming from a country other than Poland). If personnel with the same identifier already exist in the system, the system will suggest Name and Surname.

Name - personnel's name

Surname - personnel's surname.

Form of involvement - single-choice field

Period from - The beginning of the period of the person's involvement in work on the project.

Period until - The end of the period of the person's involvement in work on the project.

Notes - In this field you should:

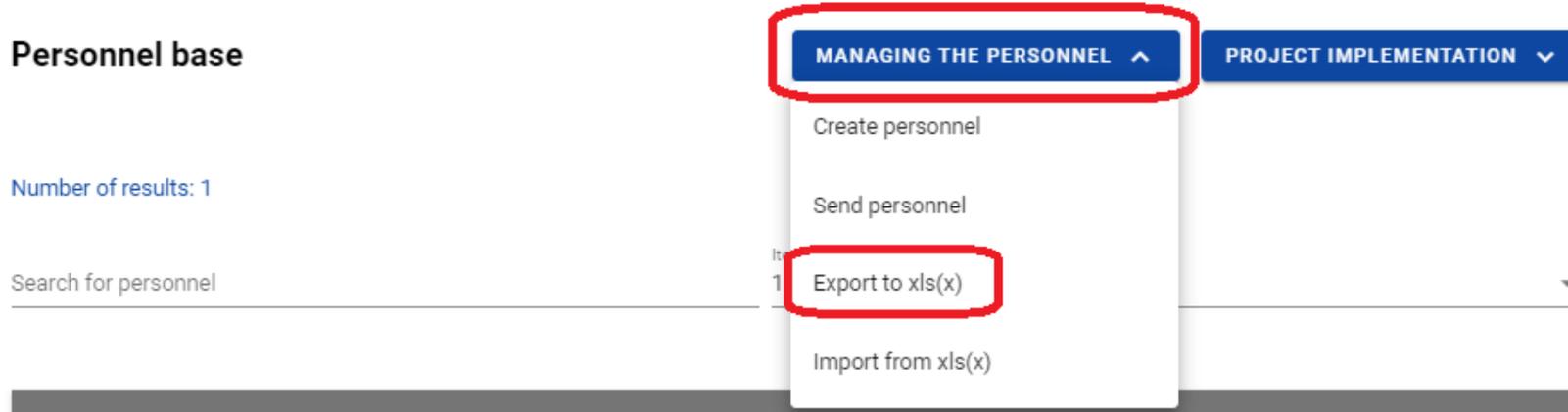
- provide additional information on how the person is involved in the project, e.g. on the basis of an allowance,
- if an allowance is settled in the project, state the legal basis for this allowance (generally applicable law or beneficiary's regulations) with a reference to the relevant regulation,
- indicate the function, position held and tasks carried out in the project by the person concerned.

When the above data is completed and saved using the Save function, the User is taken to the personnel screen.

2.4 Importing personnel from an xlsx file

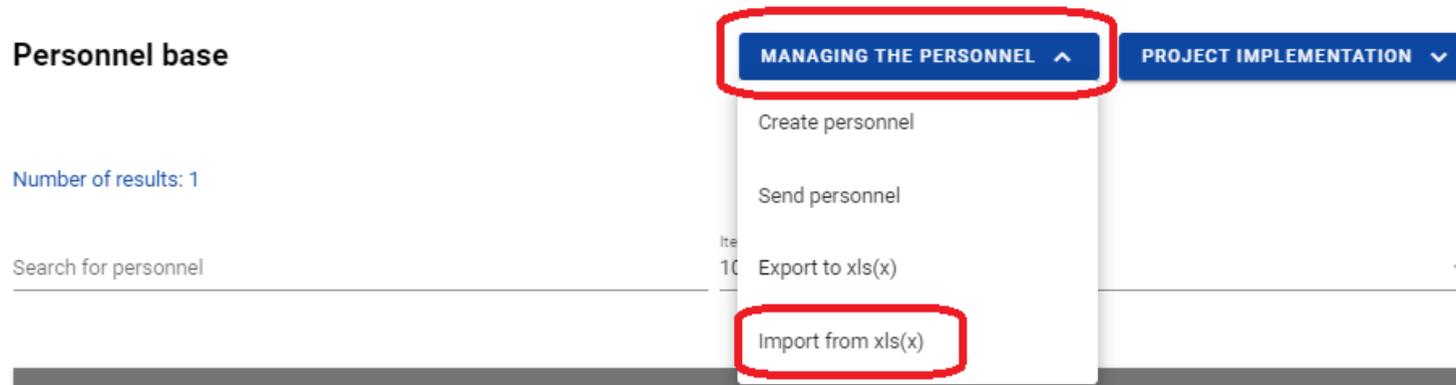
You can fill in personnel data either directly in the system or in an xlsx form exported from the system. We recommend that the details of the first person are completed in the system and then exported to the xlsx file. This way, you will know in which format to fill in the dates so that the file can be correctly imported into the system.

To export the form, select the *Export to xls(x)* function available in the Managing the Personnel menu:



- **The file is only used to add information about new personnel; you cannot use it to delete or edit existing personnel**
- **Do not fill in information on personnel already defined in the project in the file**

Only new persons involved in the project, not previously defined, should be included in the file. Once the file has been completed, select the *Import from xls(x)* function available in the Managing the Personnel menu and point to the personnel file:



Ensure that the data has been imported correctly.

2.5 Editing the personnel

You also have the option to modify the data you have entered. To do this, activate the edit function in the Managing the Personnel menu to switch the form to editable mode.

- **Personnel data can be edited until they are sent to the institution.**
- **If you wish to change the data sent to the institution, you must ask the controller to withdraw them to your level.**

Then, to change the data in the adjustment information, select the edit function from the three dots in the Adjustment Information block.

Personnel details	
Country Denmark	PESEL DK0089
Name PETER	Surname SCHMEICHEL
Form of involvement Samozatrudnienie	
Period from 2024-10-01	Period until 2025-01-31
Notes The best goalkeeper in MU history	

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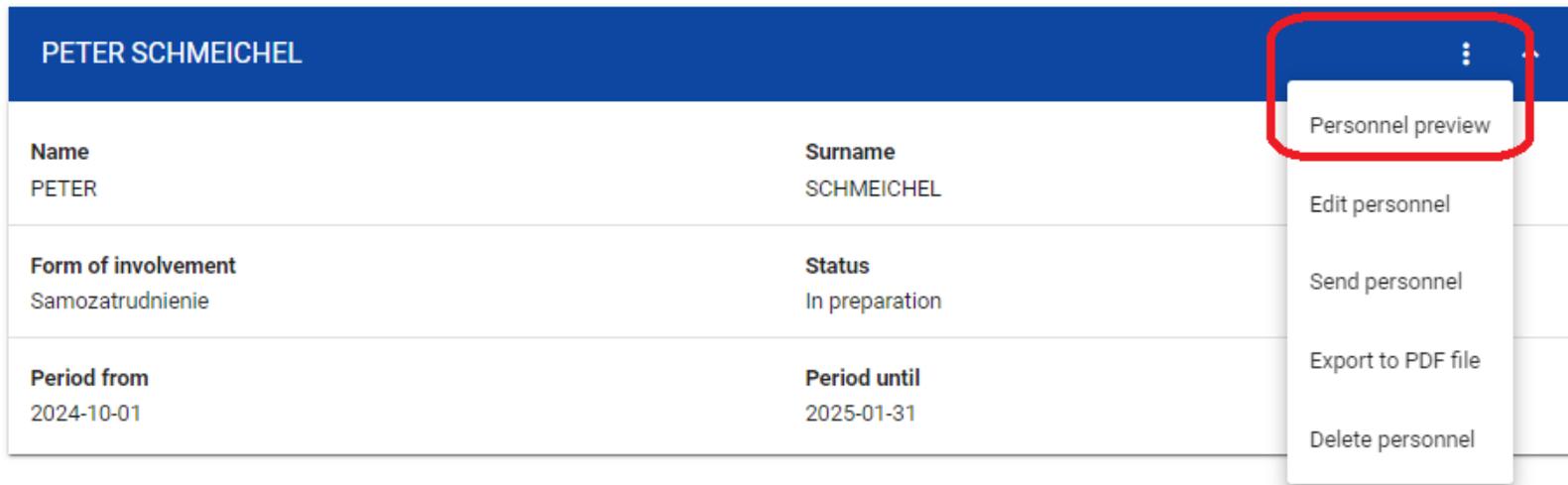
The system will present the form in edit mode. Make the required modifications and Save the data to record them.

When all mentioned above is done, the screen will again present the form with the modified data and changes to the audit data.

2.6 Preview of the Personnel details

You have the possibility not only to preview the list of personnel but also of the detailed data entered under a particular item.

To do this, in the personnel list, according to the section Personnel list preview, select the *Personnel preview* function from the menu (3 dots).



The screenshot shows a personnel record for Peter Schmeichel. The record is displayed in a table format with a blue header bar containing the name 'PETER SCHMEICHEL'. The table has two columns and three rows of data. A dropdown menu is open on the right side of the record, with the 'Personnel preview' option highlighted by a red circle. The other options in the menu are 'Edit personnel', 'Send personnel', 'Export to PDF file', and 'Delete personnel'.

PETER SCHMEICHEL	
Name PETER	Surname SCHMEICHEL
Form of involvement Samozatrudnienie	Status In preparation
Period from 2024-10-01	Period until 2025-01-31

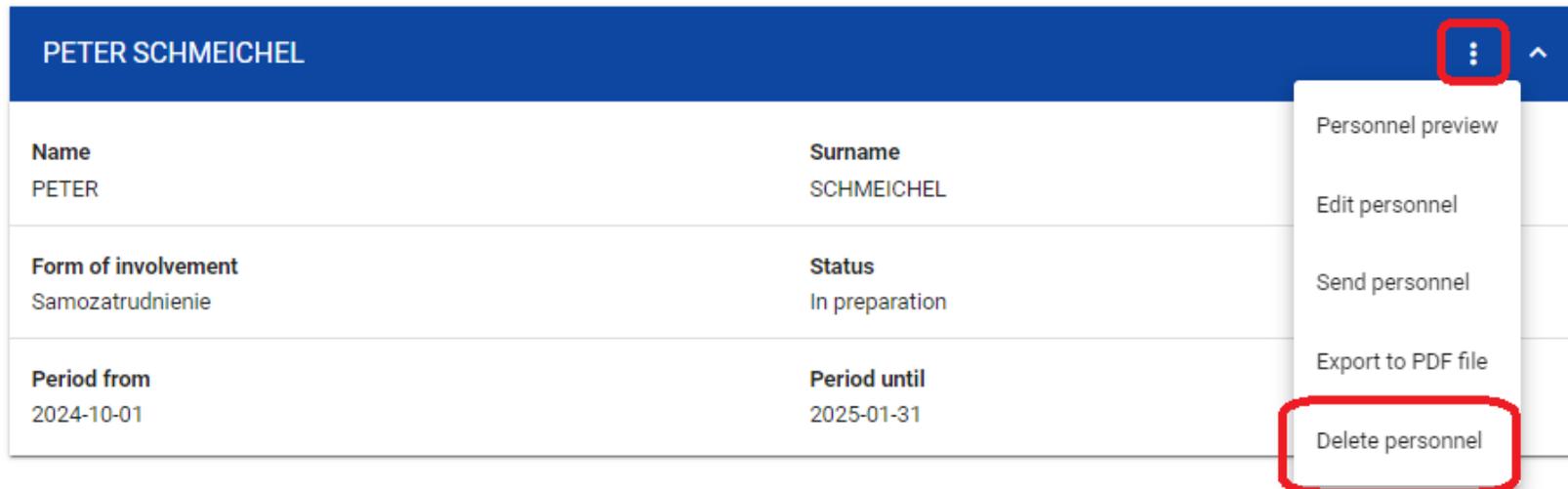
- Personnel preview
- Edit personnel
- Send personnel
- Export to PDF file
- Delete personnel

Once this is done, the system will present the personnel form.

2.7 Deletion of the Personnel

You have the option of delete the selected item from the list.

To do this, in the personnel list, according to the section Personnel list preview, select the *Delete personnel* function from the menu (3 dots).



The screenshot shows a personnel record for Peter Schmeichel. The record is displayed in a table format with the following fields:

PETER SCHMEICHEL	
Name PETER	Surname SCHMEICHEL
Form of involvement Samozatrudnienie	Status In preparation
Period from 2024-10-01	Period until 2025-01-31

A dropdown menu is open on the right side of the record, listing the following actions:

- Personnel preview
- Edit personnel
- Send personnel
- Export to PDF file
- Delete personnel**

The 'Delete personnel' option is highlighted with a red box. Additionally, the menu icon (three vertical dots) in the top right corner of the record header is also highlighted with a red box.

After this operation, the system will present a message requiring confirmation of the operation.

The delete function is also available on the personnel form in the Managing the Personnel menu.

The screenshot shows the 'Personnel preview' interface. At the top, there are two tabs: 'MANAGING THE PERSONNEL' (highlighted with a red box) and 'PROJECT IMPLEMENTATION'. Below the tabs is a table with a blue header 'Personnel information'. The table contains the following data:

Personnel information	
Name	PETER
Form of involvement	Samozatrudnienie
Status	In preparation

A dropdown menu is open under the 'MANAGING THE PERSONNEL' tab, showing the following options: 'Edit personnel', 'Send personnel', 'Delete personnel' (highlighted with a red box), and 'Export to PDF file'.

It is not possible to delete personnel with the *Send* status

2.8 Generation of a PDF file of personnel

Use the *Export to PDF file* function to generate a PDF file to preview personnel as a document. This function will generate and download a file to the user's device.

The screenshot shows a personnel record for Peter Schmeichel. The record is displayed in a table with the following data:

Name	Surname
PETER	SCHMEICHEL

Form of involvement	Status
Samozatrudnienie	In preparation

Period from	Period until
2024-10-01	2025-01-31

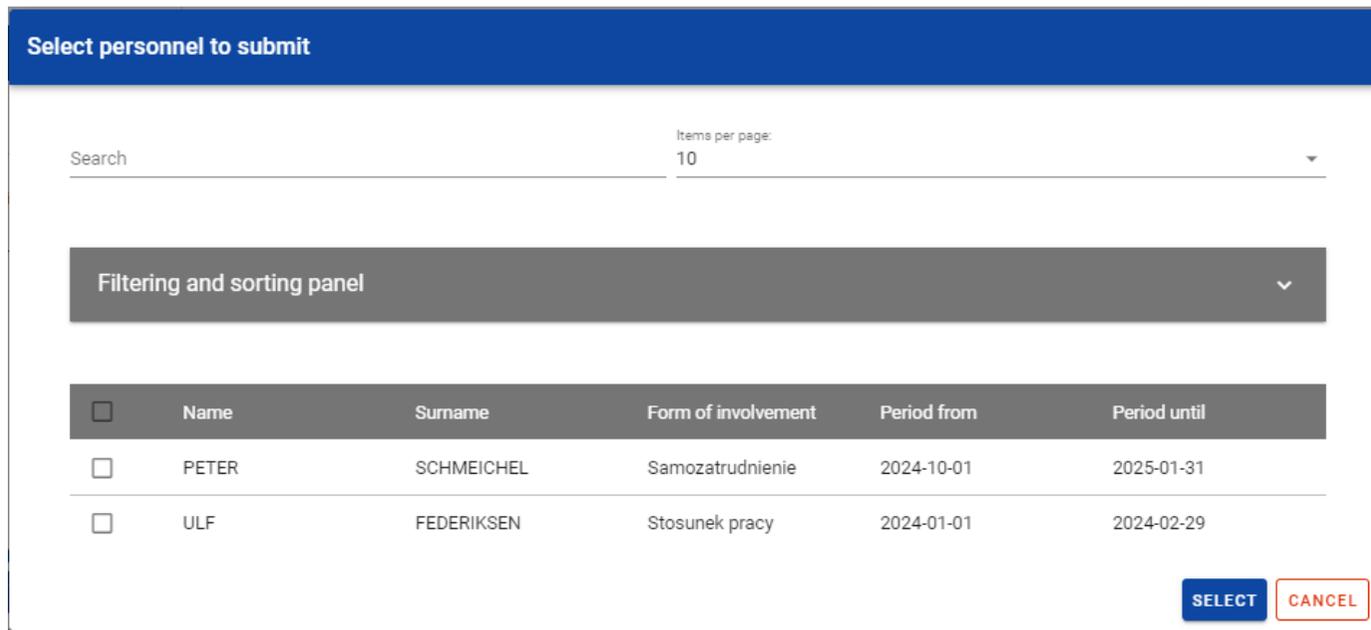
A dropdown menu is open on the right side of the record, listing the following options: Personnel preview, Edit personnel, Send personnel, Export to PDF file, and Delete personnel. The 'Export to PDF file' option is highlighted with a red box.

2.9 Sending of the Personnel

To send personnel for review at the institution level (Joint Secretariat and controller), use the *Send personnel* function.

The screenshot shows the same personnel record for Peter Schmeichel as in the previous image. The dropdown menu is open, and the 'Send personnel' option is highlighted with a red box.

The system also allows multiple personnel positions to be send at the same time with use of the *Send personnel* function available in the Managing the Personnel menu in the personnel list.

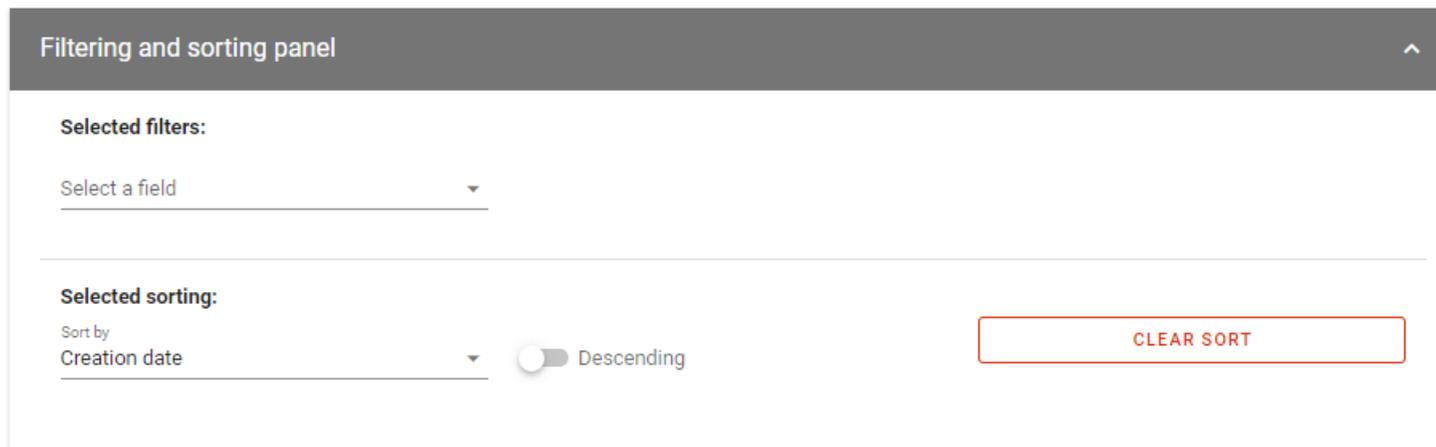


Once the personnel have been send, all selected items receive a "Send" status.

2.10 Filtering and sorting of data

When working on the staff list, the user has the option of filtering the list or sorting it. This is possible with use of the Filtering and sorting panel at the top of the list and the Text Search Engine above the panel.

Note! By default, the personnel list is sorted in descending order by date of creation.



The screenshot shows a 'Filtering and sorting panel' with a dark grey header. Below the header, there are two main sections: 'Selected filters:' and 'Selected sorting:'. The 'Selected filters:' section contains a dropdown menu with the text 'Select a field'. The 'Selected sorting:' section contains a dropdown menu with the text 'Sort by Creation date', a toggle switch labeled 'Descending' which is currently turned on, and a red-bordered button labeled 'CLEAR SORT'.

A table showing the filtering options for the personnel list is presented below.

Field name	Field type	Condition: equal to	Condition: contains	Condition: smaller	Condition: greater
Country	list (multiple choice)	-	+	-	-
PESEL (personal ID No.)	text	+	+	-	-
Name	text	+	+	-	-
Surname	text	+	+	-	-
Form of involvement	list (multiple choice)	-	+	-	-
Period from	calendar	+	-	+	+
Period until	calendar	+	-	+	+
Personnel status	list (multiple choice)	-	+	-	-
Date of creation	calendar	+	-	+	+
Date of modification	calendar	+	-	+	+

Sorting of the list is possible by fields:

- Country

- PESEL (personal ID No.)
- Name
- Surname
- Form of involvement
- Period from
- Period until
- Personnel status
- Date of submission
- Date of withdrawal
- Date of creation
- Date of modification