

Simply Personnel – Personnel Manager

Simply Personnel
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Administrator User Guide

Objectives

- Create and manage employee records
- Report on employee records utilizing analysis reports and chart features
- Create reminders and auto generate reminders
- Manage leavers and leaver processes
- Manage new starter processes
- View leave entitlements and holiday calendars
- View sickness levels and create analysis reports and trigger absence scheme tasks
- Upload and merge documents
- Utilize global updates to apply changes on mass
- Maintain all records in one software



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Introduction to Simply Personnel Manager

The Personnel Manager module allows users to create and maintain employee records and produce analytics based on this data. Users can save documents against an employee record for filing and review also using mail merge functionalities to merge data with letters. There are in-depth analysis reporting tools available for easy reporting functionality.

The purpose of this manual is to assist Administrators of the system with day-to-day functionality and also delve further into settings business processes etc.

🔇 System Setup	Task Summary
Employee Search	4 URGENT TASKS
Add Employee	0 UPCOMING TASKS 1 FUTURE TASK
Attendance Planner	
organisation Charts	Simply Answers
Reports	



System Setup

The System Setup is an area where the user can define the Organisation's structure so it can then be applied to employee records and display where they sit within the business.

- The web link should only be completed if additional modules have been purchased.
- Entering the details below can also be useful when using the mail merge feature.

Appany Name: SP Demo aphone: 020 22 33 44 Number: 020 22 33 45 Iail: info@spdemo.co.uk WW: www.spdemo.co.uk	
b Links: Service: http://localhost/simplywebpersonnel/	
esheets:	
line Recruitment:	
OK Cancel Help	
es e	Vervice: http://localhost/simplywebpersonnel/ sheets:

- Select Company Details
- Enter information on the main and address page
- Click OK

Repeat this on the address page, enter the details and select OK to save.



Business Rules

The Business Rules allow the user to define how Personnel Manager works for the company i.e. absence reasons, departments location, positions etc.

Business Rules are separated into two categories - Mandatory and Optional.

Personnel System Setup	
E Company Details	
Business Rules	
Workflow Processes	
System Parameters	
Screen Designer	
Back	
1.000	

• Select Business Rules

andatory	▲	Optional	
partments		Salary Bands	
tions		Salary Grades	
npany Hierarchy		Salary Calculation Maintenance	
loyee Groups	=	Time & Attendance Shift Plans	
S		Time & Attendance Work Periods	
day Year Profiles		Personnel Tasks	
iday Years		Automatic Task Dates	
k Holiday		Time Periods	
lay Catgories		Employment Types	
kly Holiday Accruals		Payroll Companies	
nce Categories		Notice Period	
nce Reasons	_	Courses	



Locations/Departments and Company Hierarchy

LOCATIONS & DEPARTMENTS

The first section of Business Rules allows the user to determine the organisational structure. The user can set either Locations and Departments or the Company Hierarchy.

To enter a new Department/Location

- Select Add
- Complete *Name* and *Description*
- Click OK

	٩		Departments	_	×
Mandatory	Name		Description	In Use 🔺 Add	
Departments	Accou		Accounts	☑ Update	
Locations	Admin	istration	Administration Consultants	Delete	
Company Hierarchy		n Resources	Human Resources		
Employee Groups	Π		п		
Posts	Manag			Departments	2
Holiday Year Profiles	Produc	tion	Main		
Holiday Years			Name:		
Bank Holiday		Time Periods	Description:		
Holiday Catgories		Employment 1	-	🕑 In Use	
Weekly Holiday Accruals		Payroll Comp			
Absence Categories		Notice Period			
Absence Reasons	•	Courses			
Back				OK Cancel	Help

Repeat this for locations also.

Update will allow an existing Department/Location to be amended.

Delete will remove the Department/Location and anything or anyone associated with it.

If a Department/Location is no longer in use there is an 'in use' check box to deactivate the area yet retain any historical information associated with it.



COMPANY HIERARCHY

Company Hierarchy is an alternative to using Department/Location to describe where employees work with up to 5 levels of description allowing the user to go into greater detail i.e. adding teams and cost centres.

Image: Add Image: Operation of the second price of t			
--	--	--	--

To add to an area highlight the section

- Select Add
- Enter the name and description
- Addresses can also be linked these are created within the address section on the optional side of the Business Rules



Once built the hierarchy will need to be activated, this is completed within the system parameters [see <u>Company</u> under System Parameters for activation information].



EMPLOYEE GROUPS

This is where a user is able to group employees together into specific groups i.e. managers, first aiders etc. and filter the Attendance Planner to view a group's holidays/absences.

landatory	_	Employee Groups	– 🗆 X			Add New Employees To Group
epartments						In Use
	G		In Use Add			
ocations	- 11	There are no items to show.	Update	Membe		
ompany Hierarchy			Delete	ID	Sumame	Forname
mployee Groups	=		Close	26 4	Alcock Beasley	Vicky James
osts				29	Brown	James
oliday Year Profiles				27	Butler	Adam
oliday Years						
ank Holiday						
oliday Catgories		Employment Types				
/eekly Holiday Accruals		Payroll Companies				
bsence Categories		Notice Period				Add Delete
bsence Reasons	•	Courses				
	- •) (OK Cancel Help

- Select Add
- Provide the group with a name
- Select Add from this section and use the employee search to add the relevant employees
- CTRL > click can be used to select multiple employees
- Once compiled press Add to add them to the group
- Select OK



POSTS

This is where the user can define the different job titles within the Organisation

		1					
Mandatory			Posts		>		
Departments	Post	TNA Profil	le Positio	ns In Use	Add		
Locations	Accounts Manager	Managers	999		Add		
Company Hierarchy	Administrator	Administra				Posts	
Employee Groups	Commercial Director		999		Post Maintenance		
Posts	Factory Assistant Ma	Factory Op	perative 999		- Post Maintenance		
	Factory Manager	Factory Op			Post:		
Holiday Year Profiles	Factory Operative		999				
Holiday Years	Finance Director		999		Reports to:		•
Bank Holiday	Human Resources A		999	M	Positions:	999 🛟	
Holiday Catgories		E	mpioyment i y	bes	Shares:	1 🛟	
Weekly Holiday Accruals			ayroll Compan			🔽 In Use	
Absence Categories			Notice Period		TNA Profile:		•
					Description		Set Open
Absence Reasons		. -	Courses		Document:		

Enter the job title within the Post section - users can specify the reporting job title here also. Then define how many positions are available within that post and how many people share the position.

If the business has an Administrator who works Monday to Wednesday and another Administrator who works the rest of the week there are 2 shares within that job role.

TNA Profile relates to the training needs section of Training Manager.

Description Document is where users can set the path of the job description for the role.

To add the post

- Select Add enter the title
- Select OK



Users have the "in use" check box to again deactivate a job role yet retain the history.



Holiday Setup

This section a user can define their holiday years, the start date and ends dates of the year and also bank holidays within the company.

HOLIDAY YEAR PROFILES

Here the user can provide the names of their holiday years for example there maybe two profiles if the Organisation has some employees on a financial year and some on a calendar year.

Name	In Use	Add	Name:	Holiday Year
There are no items to		Update		🔽 In Use
		Delete		
		Close		
				OK Cancel Help

- Select Add
- Enter the name
- Click OK

Update will amend an existing year, *Delete* will remove the profile and years and data associated with it.



HOLIDAY YEARS

This section the user can enter the start and end dates of the year and assign it to the relevant holiday year profile. This will be used later when activating holiday years to allow holidays to be entered to the relevant year.

- Select Add
- Select the relevant profile for the year
- Enter the start and end dates press OK

Profile	Holiday Year	Start Date	End Date	Add	í		
Holiday Year Holiday Year	2014 2015	01/01/2014 01/01/2015	31/12/2014 31/12/2015	Update Delete Close	Profile: Year: Start Date: End Date:	Holiday Year 2016 01/01/2016 31/12/2016	
_	_	_	_		(OK Cancel He	elp



BANK HOLIDAY

In this section the user can detail the bank holiday dates for the year, and also specify if they are additional to employees' annual leave entitlement and therefore would be duration of 1.

Alternatively set to 0 so the system does not deduct a day from annual leave entitlement.

On selecting bank holiday the user will be greeted with three different profiles - select the appropriate profile for the Organisation.

IMPORANT - Bank holiday dates must be updated each year.

		lame		Holidays: Profile Name:	England and Wale	s		
Mandatory		ngland and Wales		Holiday Name	Start Date	End Date	Duration	Hours
Departments		orthern Ireland		New Years Day		01/01/2015	0.00	0:00
Locations	S	cotland		Christmas Day	25/12/2015	25/12/2015	0.00	0:00
Company Hierarchy		Holiday Detail	s	x				
Employee Groups	Details:							
Posts	Holiday Nam	e:						
Holiday Year Profiles	Start Date:							
Holiday Years	End Date:					Q	Add	Delete
Bank Holiday	Duration:	0 0	lays					
Holiday Catgories		00:00	ours		0 days	S	et Colours To:	•
Weekly Holiday Accruals	Colour:	•			00:00 hours	5		
Absence Categories			_			Update		
Absence Reasons		ОК		Cancel				

- Highlight the profile for amendment
- Select Update
- Once in the relevant profile begin entering the dates
- Select Add and provide the name of the bank holiday
- Enter the start and end date
- If the duration 1 is entered a day will be deducted from employee's entitlement 0 will not
- Select OK
- Click Yes

	Simply Personnel	x
A	Do you wish to update the holidays for the employees that use this profile? All existing bank holidays will be replaced with the ones for this profile.	1
	Yes No	



It is necessary to enter the bank holiday dates each year.



HOLIDAY CATEGORIES

In this section a user is able to specify holiday categories that can then be selected when booking a holiday.

Mandatory Name Description Do Not Reduce Entitlement Add Departments Locations Annual Leave Annual Leave Description Do Not Reduce Entitlement Add Company Hierarchy Employee Groups Holiday Categories Delete Posts Holiday Years Description: TOIL Close Holiday Years Empl Description: TOIL Colour: Image: Colour:					
Locations Company Hierarchy Employee Groups Posts Holiday Years Bank Holiday Holiday Catgories Holiday Catgories Empl Weekly Holiday Accruals Absence Categories		Annual Leave			
Employee Groups Posts Holiday Year Profiles Holiday Years Bank Holiday Holiday Catgories Weekly Holiday Accruals Absence Categories					Update
Employee Groups Posts Holiday Year Profiles Holiday Years Bank Holiday Holiday Catgories Weekly Holiday Accruals Absence Categories				i	Delete
Posts Holiday Year Profiles Holiday Years Bank Holiday Holiday Catgories Weekly Holiday Accruals Absence Categories Main Name: TOIL Description: TOIL Description: TOIL Do Not Reduce Entitlement		F	loliday Categories	×	Close
Holiday Years Bank Holiday Holiday Catgories Weekly Holiday Accruals Absence Categories		Main			
Bank Holiday Colour: Holiday Catgories Empl Weekly Holiday Accruals Payre Absence Categories Notic		Name:	TOIL		
Holiday Catgories Empl Weekly Holiday Accruals Payre Absence Categories Notic		Description:	TOIL		
Weekly Holiday Accruals Payre Absence Categories Notic		Colour:	•		
Absence Categories Notic	Empl		Do Not Reduce Entitlement		
	Payro				
Abarren Darrena	Notic				
Absence Reasons	Cours			_	
Absence Reasons		Payro	Description: Colour: Empl Payrc	Description: TOIL Colour: ↓ Payro Notic	Description: TOIL Colour: Empl Do Not Reduce Entitlement Payro Notic

Checking the box Do Not Reduce Entitlement when selected will not deduct a day from the annual entitlement.



For users of Self Service element these categories will feed through to the online portal.



WEEKLY HOLIDAY ACCRUALS

Users can utilise this section to calculate holiday entitlement for employees that operate a zero hour contract or accrue holiday weekly. An employment type entitled Zero hours will also need creating in order for this to work effectively. This is set on the optional side under employment Type.

- Firstly determine the accrual percentages
- Select Add enter the details

Mandatory	Minimum Entitleme Accrual Percentage Overtime Percentage	Add
Departments	Weekly Holiday Accruals	Update
ocations	Main	Delete
Company Hierarchy	Details:	Close
Employee Groups	Minimum Entitlement:	
Posts	Accrual Percentage: 0	
Holiday Year Profiles	Overtime Percentage: 0	
Holiday Years		
Bank Holiday		
Holiday Catgories		
Weekly Holiday Accruals		
Absence Categories		
Absence Reasons	OK Cancel Help	

Then complete the Employment Type setup

		Employmen	nt Types		- • ×
Mandatory		lame	In Use	Accrue Wee	Add
Departments		ontractor	R		Update
ocations	N 1	ull Time	M		Delete
Company Hierarchy		art Time emporary	R		Close
Employee Groups	N	emporary	M		
Posts	`	\backslash			ployment Types
oliday Year Profiles		\mathbf{X}	Ma	n	
oliday Years		Ni -	En	ployment Type:	Zero Hours
ank Holiday		Time Periods			Accrues Holiday Weekly
Holiday Catgories	_	Employment Types			🖂 In Use
Veekly Holiday Accruals		Payroll Companies	_		
Absence Categories		Notice Period	_		
Absence Reasons	_	Courses	_		
Absence Reasons		courses			



Absence Setup

In this section a user can build their absence setup creating categories and linking reasons against the category for effective analysis reports. Users can also define an absence scheme to alert via tasks if an employee hits a certain pre-determined trigger.

ABSENCE CATEGORIES

Here the user will first create absence categories to then associate with absence reasons.

usiness Rules			Absence Categories		- 🗆 X
		lame		In Use	Add
landatory	▲	 ppointment		M	Update
epartments		 Compassionate		R	Delete
ations		 Aaternity aternity			Close
npany Hierarchy		 ick		R	
loyee Groups		Inauthorised		M	_
s			Absence Categories	2	×
day Year Profiles		Main			
day Years		Name:			
k Holiday			🖉 In Use		
day Catgories					
ekly Holiday Accruals					
ence Categories					
ence Reasons	_				
					_
Back					
					-
			OK Cance	Help	

- Select Add
- Enter the category
- Press OK



Deleting a category will remove all reasons assigned to it and therefore potential absence data corruption. If a category/reason is no longer required, uncheck the In Use box.



ABSENCE REASONS

Here the user can pinpoint the reason for the absence and assign to the relevant category. Users also have the option to include the absence within the absence scheme which will by default include in the scheme such as the Bradford Factor but can be manually un-checked on creating the absence at the time.

Departments Der Locations Flu	kache itist itor	Category Sick Appointment Appointment	Absence Sche	In Use	Add Update	Main Absence Reason:	
Departments Der Locations Flu	itist tor	Appointment	R		Update		
Locations Doo	tor			R			
Locations Flu		Appointment		prod.	Delete	Category:	Appointment 🔹
Flu			M				Include in Absence Scheme
Company Hierarchy Her		Sick		R	Close		In Use
	idache	Sick	M	R		Colour:	
	ternity leave	Maternity		R		Colour.	
Posts Net Sick	dical	Appointment Sick	R				
Holiday Year Profiles		SICK	2				
Holiday Years		Automatic Task Dates					
Bank Holiday		Time Periods					
Holiday Catgories		Employment Types					
Weekly Holiday Accruals		Payroll Companies					OK Cancel Help
Absence Categories		Notice Period					
Absence Reasons	_	Courses			•		

- Select Add
- Enter the reason
- Select the relevant category
- If required, check to include in the absence scheme
- Click OK



'Hide in Self Service' if using Self Service and wish to restrict the view.

It is also possible to ensure a certain reason generates a self-certification email to the employee.



ABSENCE SCHEME

In this area a user is able to define the company's absence policy to set triggers to alert them if an employee's absence is high.



	Scheme Name Absence Count	Scheme Type Occurrence	In Usr	Update		🔽 In Use
Departments Locations Company Hierarchy			In Use	Update		
	Absence Count				Calculated Value:	
Company Hierarchy	Attendance Reward	Reward			O Duration	
company merarchy	Bradford Factor	Score Based	R		O Number of Ab	osences
Employee Groups					Bradford Factorial	tor Calculation
Posts					(Number of A	bsences x Number of Absences x Total Duration)
Holiday Year Profiles					Date Settings:	
Holiday Years				Close	Rolling Period	d: 12 Months
Bank Holiday				Liose	Fixed Date:	
Holiday Catgories	Employment Types				Day:	
Weekly Holiday Accruals	Payroll Companies				Mont	
Absence Categories	Notice Period				O Use First Abs	ence
Absence Reasons	Courses					

- Select the absence scheme required
- Click Update
- Select the calculated value and date settings required

		Absenc	e Sch	ieme		x
1ain	Triggers					
Deta	ails:					
De	scription			Lower Limit	Upper Limi	t
		d Action - T				
		d Action - Fi			649.99	_
		d Action - Fi			399.99	_
Re	commende	d Action - V	erb	50.00	124.99	_
	(Add		Update	Delete	
		0	к	Cancel	He	lp

• Select the Triggers tab to amend the score in line with the policy in place, and amend the description of the tasks [optional]



- o To do this highlight the relevant trigger
- Select *Update*
- Click OK



ABSENCE ENTITLEMENTS

This section allows a user to define the company sick pay which when assigned to each employee will calculate their absences at a full rate and reduced rate and identify how much time is unpaid.

Mandatory	.	Absence Entitlements –	□ ×			In Use	
Departments	Profile Name	Available After (Mont In Use	Add	Date Setting	s:		
Locations	Employee		odate	Rolling Pe	riod: 12	2 Months	
Company Hierarchy	Manager	3)elete	Fixed Dat	ie:		
Employee Groups			Close		Day: 0		_
Posts						nuary	w.
Holiday Year Profiles				O Use Emple	oyee Start Date		
Holiday Years				Entitlements:			
Bank Holiday						g Duration Full Ra	
Holiday Catgories	<u> </u>	Employment Types		Sick	2.00	3.00	10.00
Weekly Holiday Accruals		Payroll Companies					
Absence Categories		Notice Period					
Absence Reasons		Courses			Add	. Update	Delete

- Select Add
- Name the profile a company can have more than one profile if the policy is not the same for all employees
- Specify when Company sick pay starts in 'Available after (Months)' for example, after the probation period has expired.
- Specify the date settings
- Begin adding categories
- Specify a waiting duration
- How many days at a full rate and how many days at a reduced rate
- Click OK



This will then be visible on each employee record using the above rule to calculate paid entitlement



Access Profiles and User Maintenance

Within this area a user is able to set up access to Personnel Manager and restrict or un-restrict certain areas of the system.

ACCESS PROFILES

The user determines access using the traffic light symbols to restrict, un- restrict and provide read only permissions to certain areas.

			Access Profiles	- 0 X	General Settings:	
Mandatory	^ î r		Access fromes		🕀 🕒 🚞 Personnel	 Restricted
Departments		Name	Description	Add	Employees	A Read Only
Locations		FULL ACCESS	FULL ACCESS	opuate	🕒 🚞 Holiday Card	Unrestricted
Company Hierarchy		HOLIDAY	HOLIDAY	Delete	Global Pay Change Task List Access Maintenance	A Different Permissions
Employee Groups	=			Close	🔁 💳 Task List	The access profile
Posts					Holiday Year Planner Employee Attendance Record	maintenance allows you to define which areas of
Holiday Year Profiles					Open Ended Absences Conflict Personnel Mail Merce	the system a user has access to.
Holiday Years					Process Designer	Use the general settings
Bank Holiday					E 🕒 🧰 Training E 🕒 🧰 Courses	to restrict access to particular options.
Holiday Catgories		Employment Typ	es			Use the Licensed
Weekly Holiday Accruals		Payroll Compani	es		Licensed Products:	Products section to restrict access to each
Absence Categories		Notice Period			Restrict All Simply Personnel Screens Restrict All Simply Training Screens	product.
Absence Reasons	•	Courses			Restrict All Simply Recruitment Screens	Use the Categories page
	· · ·				Restrict Audit Reporting (SQL Server only)	to restrict access to certain document groups
Back						and notes categories.
DACK					Disables all of the options in the Personnel module.	

- Select Add
- Name the profile
- Select the dot on the areas to restrict that section, select it again to make it read only
- Click OK



There is also a Categories tab which will allow users to restrict the profile on certain Document groups, Notes and Absence Reasons.



USER MAINTENANCE

Within this section users are able to create the user username, password and assign an access profile created previously.

		Users	– 🗆 X	Password:	
Mandatory				Name/Employee:	Set Clear
Departments	Username AABBOTT	Name Albert Abbott	Add	Profile:	FULL ACCESS -
ocations	ABBOTT	Albert Abbott ADMIN	Update	Security Level:	0 🗘
Company Hierarchy			Delete		Link Tasks to Outlook Diary
Employee Groups			Close		🕑 Use Dashboard
Posts				Department/Lo	cation Access:
Holiday Year Profiles				Department	Location Add
Holiday Years				< <all>></all>	< <all>> Delete</all>
3ank Holiday					
Holiday Catgories	Employment	Types			
Weekly Holiday Accruals	Payroll Comp	anies			
Absence Categories	Notice Period	l		Use the departs	ment/location access to allow access to specific
Absence Reasons	Courses			department/loc departments/lo	ation combinations. Use < <all>> to allow access to all cations and <<blank>> for blank departments/locations.</blank></all>

- Select Add
- Provide the username
- Set it against their employee record
- Set the access profile

If Locations/Departments are required:

- Option available to remove the ALL /ALL on the Location/Department section to restrict the user to only certain departments or locations
- To do this highlight all and click Delete
- Select Add to add the relevant departments and locations



If Hierarchy is required

- Select the Hierarchy tab
- Tick the areas the user has access to
- Click OK



Each time a new section is added to the hierchy, users will need to provide existing accounts access to the new section via System Setup>Security>User Maintenenace.



SECURITY LEVEL

Within this section a user can determine who a user has access to by determining security levels on the User Maintenance account and then assigning on the employee's records Work tab.

If a user a level of 0 is assigned the user will see all accounts, if a user a level of 1 is assigned the user will only see those on 1 and below.

	User Maintenance	x	Security level setting
Jser Maintenance	Hierarchy		on user account.
Usemame:	AABBOTT		on user account.
Password:	•••••		
Name/Employee:	Albert Abbott 1 Set Clea	ar	
Profile:	HOLIDAY	•	
Security Level:	0 🗘		
	Link Tasks to Outlook Diary		
	Use Dashboard		
Department/Loc	cation Access:		
Department	Location Add		
< <all>></all>	< <all>> Delete</all>		
	nent/location access to allow access to specific		
department/loca	ation combinations. Use < <all>> to allow access to all</all>		
department/loca	ation combinations. Use < <all>> to allow access to all cations and <<blank>> for blank departments./locations</blank></all>	3.	
department/loca	ation combinations. Use < <all>> to allow access to all</all>	_	

On the employee record:

	Work Details:		Work Details:		
	Date Commenced:	05/01/2006	Company E-mail:	a.abbott@simplydemo. 🚩	Absences
	9 years 8 months	On Fixed Term	Security Level:	0	
	Fixed Term End Date		How Recruited:		
Albert Abbott	Employment Type:	Full Time 🔹	Recruitment Cost:	£0.00	
Human Resources Manager	Internal Extension:				
Management	Continuous Service		Payroll Informatio	n:	Holidays
London Reports To:	Date: 0 years 0 months		Payroll Number:		
Catherine Bathley	Length of Service	LOS 1			
Cathenne bathley	Profile:		Payroll Company	Sage 🔹	
	Working Duration (Da	ays/Hours):	Picture:		
Personal	Monday:				Click the charts for more
Work	Tuesday:	1 07:30			information
	Wednesday:	1 07:30			Employment Calculator
Attendance	Thursday:	1 07:30			Deels Heliders
Training / Qualifications	Friday:	1 07:30			Book Holiday
Docs / Contracts	Saturday:	0 07:30			Record Absence
	Sunday:	0 07:30			Attendance Record
Other				Import Clear	
					Holiday Card
					Save Cancel



TASK LIST ACCESS

This section shows how a user is able to assign tasks to other users of Personnel Manager so they can view the same tasks.

landatory	Optional Access Granted To The Tasks Of:	
epartments	Salary Bands 🌗 Task List Access — 🗆 🗙	
ocations	Salary Grades	
ompany Hierarchy	Salary Calcula	
nployee Groups	Time & Atten	
osts	Time & Atten	
oliday Year Profiles	Personnel Tas	
oliday Years	Automatic Ta: Close The user being updated will be granted ac to all the tasks in the list for the selected u	cess
ank Holiday	Time Periods	ers.
oliday Catgories	Employment Types Save Car	cel
eekly Holiday Accruals	Payroll Companies	
osence Categories	Notice Period	
osence Reasons	Courses	

- Highlight the user
- Click Update
- Check the box for those who are to be granted access
- Click Save



Document Templates and Email Templates

DOCUMENT GROUPS

A user can store document templates that can then be merged against an employee's record. By creating document groups a user is are able to easily filter through the documents i.e. they may have a Contracts group in which the user may store an employee's contract of employment or salary review letters.

Document groups are also used to group together any template documents required for sending out to an employee.

Within the document group users can then specify default file names.

	Document	t Groups	– 🗆 🗙	Group:	
Mandatory	Name	In Use	Add	🔽 in Use	
Departments	Absence	In Use			
Locations	Appraisal	R.	. Update	Default Filenames:	Add
Company Hierarchy	Contract		Delete	Filename	Delete
	Disciplinary	M	Close	There are no items to show.	
Employee Groups	Emails	R			
Posts	Grievance				
Holiday Year Profiles	Leaver	M			
Holiday Years	New Starter	2	•		
Bank Holiday	Lime Periods			OK Cance	l Help
Holiday Catgories	Employment Types				
Weekly Holiday Accruals	Payroll Companies				
Absence Categories	Notice Period				
Absence Reasons	Courses				
	·····				
Back					

- Select Document Groups
- Click Add
- Enter the group name
- To add a default filename again select Add and enter the name
- Click OK



PERSONNEL DOCUMENTS

This section shows how a user can insert a template document which can then be merged with an employee's record to automatically insert the relevant data.

Mandatory	<u> </u>	Personnel Documents	– 🗆 🗙			
epartments	Document Gr	roup: < <all>></all>	Add			
ocations	Document	Group		/		
ompany Hierarchy		for Employm New Starter				~
mployee Groups		for Flexible Working Time	= Copy	21	tandard Document	
Posts	Confirmatio	on of Dismiss Disciplinary	Delete	Please enter the name bel	ow you would like to give to the	ок 🔵
	Confirmatio	on of Dismiss Disciplinary		be shown in the list of stan	e creating. This is the name that will dard documents to use when	Consect
oliday Year Profiles		from Wages Contract		creating new documents a	gainst an employee.	
loliday Years	Disciplinary	Investigation Disciplinary		Standard Document Name:	Contract	
lank Holiday	Disciplinary			Group:	New Starter	
Ioliday Catgories		e of Disciplina Disciplinary		citoup.	New statter	
		Varning Notice Disciplinary				
Veekly Holiday Accruals	employmer					
bsence Categories	Employmer					
bsence Reasons	Exit Intervie	w Form Leaver	 Close 			

- Select Add
- Provide a name for the document
- Click *OK* the next dialog box will appear allowing the user to browse to an existing template or create a new one.





If a server busy message appears, this is due to a permission box waiting behind all open applications. Press ALT AND Tab on the keyboard to navigate to this area:





To create a new document

- Select Create New
- Choose the file format
- The document will open to allow the user to insert merge fields



The box illustrated below will appear on the MS Word toolbar



When creating the document users should use merge fields and insert into documents where relevant.

Once amendments to the documents have been completed the document must be closed but not saved. Simply Personnel saves the document automatically.



If an error message is displayed stating a text file is missing please follow the guidelines here :

https://simplypersonnel.zendesk.com/entries/22993167-Personnel-Manager-This-filecould-not-be-found-C-Program-Files-merge-txt-



EMAIL GROUPS

This section illustrates how the user can create email groups to enter their email templates again for filtering purposes.

Mandatory	<u>^</u>	Optional		^			Email Group Maintenance
Departments			Email Groups		– 🗆 X	Email Group	
Locations						Details:	
Company Hierarchy		roup Name ew Starter	Personnel Training F	tecruitme In Us	Add	Group:	
Employee Groups	=		10. L.	L. R.			Simply Personnel
Posts					Delete		Simply Training
Holiday Year Profiles					Close		Simply Recruitment
Holiday Years							🖸 h Use
Bank Holiday							
Holiday Catgories							OK Cancel Help
Weekly Holiday Accruals		Fayron Companies					
Absence Categories		Notice Period					
Absence Reasons	•	Courses		.			

- Select Add
- Enter the name of the Group
- Click OK



Checking the other modules allows the user to access this group from other sections of the software if those modules are available.



EMAIL TEMPLATES

After creating the Email Group within this section the user is able to create an email template that can be sent to employees through the Personnel Manager system.

Business Rules			Document Group: < <all>></all>	- Add	<u> </u>
			Email Template Maintenar		3
Mandatory Departments Locations Company Hierarchy Employee Groups	Template Template Details: Template Name: Email Group:	 New Starter	Attachments: Attachment Th	ere are no items to show.	Add Delete
Posts Holiday Year Profiles Holiday Years Bank Holiday Holiday Catgories Weekly Holiday Accruals Absence Categories Absence Reasons Back	Email: From Address: To: CC: BCC: Subject: Body:	Use HTML HTML Editor		Select one the fields from wish to update and then o button, or manually type th [[Applicant Address 31] [[Applicant Address 31] [[Applicant Address 51] [[Applicant Address 51] [[Applicant Address 51] [[Applicant Address 51] [[Applicant Address 51] [[Applicant Address 51] [[Applicant DateOfBirth]] [[Applicant DateOfBirth]] [[Applicant Event Tiotal [[Applicant Event Tiotal [[Applicant Event Tiotal [[Applicant Event Tiotal [[Applicant Event Tiotal [[Applicant Event Tiotal [][Applicant Event Tiotal [][Applicant Event Tiotal [][Applicant Event Tiotal	alick on the Inset he field where required.
				ОК	Cancel Help

- Select Add
- Provide the template with a name and link to the relevant group
- Untick Use HTML
- Using the merge fields on the right begin to build the body of the email
- Click OK



CLEAR LOCKED DOCUMENTS

If a message opens stating a document is in use and cannot be accessed when accessing a document the user can clear the In Use flag and access the document.

- Select clear locked documents
- The following screen will appear



- Select Yes
- The next confirmation screen will appear



• Click OK



Optional - Business Rules

This section allows the user to populate dropdown lists on an employee record such as nationality, ethnic origin etc. It is simply a case of adding and saving the entry which will then be accessible from an employee's record within the relevant dropdown list.

SALARY BAND MAINTENANCE

In this section users are able to set upper and lower limits for employees and apply them to the band via their salary record.

ain		(S	alary Band Maintenance		– 🗆 X		
lame:	Band 16	Name <u>a</u> Band 16	Effective Date 17/08/2015	In Use	Add		_
Description:	Band 16	Band 10	17/08/2015	M	Update	Optional	<u>^</u>
Jpper Limit:	£30,000.00				Delete	Salary Bands	
ower Limit:	£20,000.00				Close	Salary Grades	
ffective Date:	17/08/2015					Salary Calculation Maintenance	=
	🔽 In Use					Time & Attendance Shift Plans	
						Time & Attendance Work Periods	
						Personnel Tasks	
		Holiday Years	5			Automatic Task Dates	
	\frown	Bank Holiday				Time Periods	
	OK Cancel Help	Holiday Catg	ories			Employment Types	
		Weekly Holid	ay Accruals			Payroll Companies	
		Absence Cate	gories			Notice Period	
		Absence Reas	sons			Courses	
					•		•
		Back					

- Click Add
- Enter a name and description for the banding
- Enter a lower and upper limit
- Enter the date the banding came into effect
- Click OK



SALARY GRADE MAINTENANCE

In this section the user is able to set the Organisation's salary grading where the grade is a specific value.

ime	Effective Date	In Use	Add		
int 1	17/08/2015	R	Update	Optional	
Sa	lary Grade Maintenance	x	Delete	Salary Bands	
Main			Close	Salary Grades	
Name:	Point 1			Salary Calculation Maintenance	=
Description:	Point 1			Time & Attendance Shift Plans	
Salary:	£22,000.00			Time & Attendance Work Periods	
Pay Period:	Year 🔹			Personnel Tasks	
Effective Date:	17/08/2015			Automatic Task Dates	
	🖾 In Use			Time Periods	
				Employment Types	
				Payroll Companies	
				Notice Period	
			•	Courses	•
	OK Cancel	Help			

- Select Add
- Enter the name and description for the grade
- The pay period; monthly yearly hourly etc.
- Enter the effective date
- Click OK



When applying a grade/band or both to an employee their salary must follow the rule if the salary does not fall into the specific grade the record will not save.



Work Periods and Shift Plans

It is important for employees' working patterns to be created in the system so when a holiday/absence is entered the system knows the days they do and do not work so can deduct accordingly.

	Work Periods		– 🗆 🗙	Optional	
lame	Description	Is Active	Add	Salary Bands	
ull Time	Full time		Update	Salary Grades	
	Monday , Tuesday Wednes	R	Delete	Salary Calculation Maintenance	
Vednesday & Thursday	Wednesday & Thursday	M		Time & Attendance Shift Plans	
Week 1 Week 2	Week 1 Week 2	R	Close	Time & Attendance Work Periods	
VCER 2	WEEK 2	M		Personnel Tasks	
				Automatic Task Dates	
				Time Periods	
Holiday Catgor	es			Employment Types	
Weekly Holiday	Accruals			Payroll Companies	
Absence Catego	ories			Notice Period	
Absence Reaso	ns			Courses	

- Select Work Periods
- Select *Add* the next dialog box will appear to allow to specify the days and hours.

Details:							
Name:	Full Time						
Description:	Full time						
	Is Active						
Day	Start Time	End Time	Grace IN (mins)	Grace OUT (mins)	Break Hours	Work Hours (hrs)	Days
Monday	00:00	00:00	0	0	00:00	07:30	1
Tuesday	00:00	00:00	0	0	00:00	07:30	1
Wednesday	00:00	00:00	0	0	00:00	07:30	1
Thursday	00:00	00:00	0	0	00:00	07:30	1
Friday	00:00	00:00	0	0	00:00	07:30	1
Saturday	00:00	00:00	0	0	00:00	00:00	0
Sunday	00:00	00:00	0	0	00:00	00:00	0
					0:00	37:30	5.00
Sunday	00:00	00:00	0	0			



SHIFT PLAN

Using the shift plan section a user is able to set rotating shifts plans using the work period first to create the various working weeks, then linking them to a shift plan within this section.

	4	Shift Plans	_		Name: Description:	Night Staff			
Mandatory					beschpton.				
Departments	Name	Description There are no items to show.		dd					
ocations		There are no items to show.		date					
Company Hierarchy				elete		Rotating Shift			
Employee Groups				llose					
Posts					Details:				
Holiday Year Profiles					Week Worl		ork Period Descripti :ek 1	Number of Weeks	Add
Holiday Years					2 Weel		ek 2	1	Upoate
Bank Holiday		time Periods							Delete
Holiday Catgories		Employment Types							
Weekly Holiday Accruals		Payroll Companies							
Absence Categories		Notice Period					6	OK Cancel	Help
Absence Reasons		Courses			-				nop
	•								
Back									

- Select Add
- Provide the shift a name
- Add the various weeks and the duration
- Click OK



AUTOMATIC TASK DATES

This section shows users how to set reminders based on the list of date options.

Business Rules	Automatic Task Dates	- 🗆 X
	Description Based On Gender Days Months Years In Use	Add
	3 Year Length Of Service Employee Start Date Roth 0 0 3 9	Update
Mandatory		Delete
Departments	Main	
Locations	Task Details: Description: 3 Month Probation Review	
Company Hierarchy		
Employee Groups		Apply
Posts	Gender: Both	
Holiday Year Profiles	In Use	
Holiday Years	Apply To:	
Bank Holiday	Department: << <ll>></ll>	Close
Holiday Catgories	Employment Types	
Weekly Holiday Accruals	Payroll Companies Employment	
Absence Categories	Notice Period	
Absence Reasons	Courses Date Offset:	
	Days: 14 C Enter a negative number to create a	
Back	Months: 2 reminder dated before the selected	
Back	Years: 0 🛟 date.	
	Assign Tasks To:	
	Owner: AABBOTT	
	OK Cancel Help	

- Select Add
- Enter the description of the reminder and select the required date for basing the task on
- Specify criteria on which it will apply to i.e. Department/Location etc.
- Within the Date Offset enter the reminder period e.g. 3 months after employee's start date
- Assign the task to the relevant employee
- Click OK

The following dialog box will appear to determine when the user would like to start using the task

	his task, or update existir where the calculated tas		
🔵 Do not create t	asks		
🔘 Create tasks fo	all employees		
 Create tasks for 	r employees where the ta	sk date has not passe	ł
		ОК	Cancel


EMPLOYMENT TYPES

Here a user is able to create the necessary employment types.

		Employment Ty	pes		– 🗆 X	Employment Type:	Zero Hours
Mandatory	Name		In Use 🖌	Accrue Wee	Add		Accrues Holiday Weekly
Departments	Contractor		R		Update		🔽 In Use
Locations	Full Time		R				
Company Hierarchy	Part Time		R		Delete		
Employee Groups	Temporary		M		Close		
Posts	Zero Hours		M	R			
Holiday Year Profiles							
Holiday Years							OK Cancel Help
Bank Holiday	Time P	rioas			_		
Holiday Catgories	Employ	yment Types					
Weekly Holiday Accruals	Payrol	l Companies					
Absence Categories	Notice	Period					
Absence Reasons	Course	es					

- Enter name
- Relating back to the mandatory rules there is the option to link with the weekly holiday accrual.
- Click OK



NOTICE PERIODS

Here a user will create all notice periods recognised within the Organisation.

Mandatory		Not	tice Periods	- • ×	Main	
Departments		Name	In Use	Add	Name:	I
Locations		1 Month	In Ose			🔽 In Use
Company Hierarchy	_	1 Week		Update		
Employee Groups		2 Months	M	Delete		
		2 Weeks	M	Close		
Posts		3 Months		_		
Holiday Year Profiles		3 Weeks	M	_		
Holiday Years						
Bank Holiday						
Holiday Catgories		Employment Types				
Weekly Holiday Accruals		Payroll Companies				OK Cancel Help
Absence Categories		Notice Period				
Absence Reasons		Courses				
	•	courses				

- Click Add
- Enter the description
- Click OK



The user is able to assign a notice period within an employee's Right to Work information and the option exists to increase notice periods alongside the length of service as per overleaf.



LENGTH OF SERVICE

Here the user is able to set increment of holidays, absence entitlement and notice e periods after being with the company for a certain period of time.

Business Rules	٠	Length of S				Lor	ath of Convic	a Maintanansa	x
	Profile Name		Max. Holida I	n Use 👘 Add		Ler	igin or servic	e Maintenance	~
Mandatory	LOS1		28.00	Dpgate	Main	aller.			
Departments				Delet		ile Name:	LOS 1		
Locations				Close	Max	. Holiday En	titlement: 28		
Company Hierarchy							🔽 In U	se	
Employee Groups					- Entit	tlements:			
Posts					Mo		ays % Increase	Employee No Emp	loyer No
Holiday Year Profiles		строппет тарка				1.00			
Holiday Years	A	utomatic Task Da	tes		60	1.00			
Bank Holiday	Т	ime Periods			120	1.00			
Holiday Catgories	E	mployment Types	;						
Weekly Holiday Accruals	P	ayroll Companies							
Absence Categories	Ν	lotice Period							
Absence Reasons	, (ourses							
							Add	Update	Delete
Back							Additt	oputient	Delete
back									
							0	Cancel	Help

- Click Add
- Provide the profile with a name
- Using the month's section set the period of time and then set the increments.
- Click OK



Optional Business Rules allow a user to populate dropdown lists on an employee record, yet managing and restricting the list so when reporting there is a limit to duplication of items.



System Parameters

Here the user can set further default values for the system.

PERSONNEL

	System Parameters	1
🚍 Company Details	Personnel Holidays Absences Task List Work Details Training Recruitment Company Email	
Business Rules	Security Level: Security Level: New Starter Procedure: Show Absences Show Courses	
Workflow Processes	Process: New Stater	
System Parameters	FIE Details: Use FTE Full Time Working Hours: 37.5 Soft Code:	
Screen Designer	Use the format XX-XX-XX for the bank sort code Salary Settings:	
	Overtime Rate: 1.5 x Hourly Rate	
Back	OK Cancel Help	>
Refers to workflow		
processes		



Entering the full time working hours and checking FTE allows the system to pro-rata based on this value, when adding new starter's part way through the year and also those on reduced hours.



HOLIDAYS

This section allows the user to pro-rata a new employee holiday entitlement based on the full time balance.

	System	Parameters
Company Details	Personnel Holidays Absences Task List Work Details Holiday Entitlement Calculation:	Training Recruitment Company Email
Business Rules	 ✓ Round Entitlement ○ To the nearest ○ Up to the next 1/2 v day. 	TOIL Expires:
Workflow Processes	Down to the previous Use Working Duration to Calculate Entitlement: Weeks Holiday Per Year: 5.6	Day: 1 Month: January *
System Parameters	Default Values: Holday Entitlement: 28	Holiday Accrual:
Screen Designer	Length of Service: Add Edra Entitlement as: Additional Entitlement	Update Holiday Accruals after Logging In Default Monthly Accrual: 0
_		OK Cancel Heb

COMPANY

Here is where the user can activate the hierarchy setup

Hierarchy: ✔ Use Hierarchy	Currency:
Level 2 * is used for Department Level 1 * is used for Location Level 1 Description: Location Level 2 Description: Department Level 3 Description: Level Level 4 Description: Level Level 5 Description: Level	Maintenance: Close Maintenance Windows when Saved Close Task List when it opens another window Close Search screens after opening records
	OK Cancel Heb



EMAIL

	System Parameters	x
Personnel System Setup	Personnel Holidays Absences Task List Work Details Training Recruitment Company Email	
	Email Server Settings: Email Method:	
E Company Details	Server Name / IP Address: Post: 25 Post: 25 Pos	le
Business Rules	The Outlook option will link directly with Microsoft Outlook and the MailTo option will open the computer's default email program.	
business itules	Method: None -	
	Usemame: Outlook	1
H Workflow Processes	Password:	
System Parameters	FTP Settings:	
System Parameters	FTP Server / IP Address:	
	Port: 0 Vacancy Folder:	
🝨 Screen Designer	Usemame: Applicant Folder:	1
	Password:	
	OK Cancel Hel	,
Back		



This section is important in order to send emails to employees.



Toolbar-System Setup

While a user is completing work from the dashboard or on an employee record the toolbar can be used to populate the business rules also.

ard

The company drop down menu will allow a user to populate the location, departments notice periods etc.

	HOME	SYSTEM	A SETUP	PERSONNEL	TRAINING	RECRUITMENT	REPORTS	UPDATES	DOCUME
Company	¢° Work	Employee	Time & Attendance	Training Reci	uitment Compa		reen Business	Security Docu	() iments
·	B C L	bsences enefits lisciplinary eaving Reas lotes Categ ersonnel Ta	sons ories		System Setup	nel System	-	·	Dasht
	L	osts ength of Se ïsa Types Vork Permit				ipany Detai ness Rules	ls		
l					T Wor	kflow Proce	esses		

The work drop down menu will allow a user to populate absence configuration such as reasons etc.



The employee drop down menu allows users to create contact types such as work, home etc.



The time and attendance drop down menu will allow a user to configure a working pattern for an employee.

HOME SYSTEM	I SETUP PERSONNEL TRA	NING RECRUITMENT	REPORTS UPDATES	DOCUMENTS	HELP
Company Work Employee	Attendance	Details Parameters Des	reen Business Security Do	Cuments ▼	
	Work Periods System	Setup			
	Shift Plans			Dealtheand	_
				Dashboard	
		sonnel System Company Deta Business Rules Workflow Proc	ils		



Here a user can create access profiles and user accounts for access to Personnel Manager.

HOME SYSTEM SETUP PERSONN	L TRAINING RECRUITMENT REPORTS	UPDATES DOCUMENTS HELP
Company Work Employee Time & Training	Recruitment Company System Screen Business	Security Documents
Attendance	 Details Parameters Designer Processes System Setup 	Users
	•	Access Profiles Task List Access Pard
	Personnel System Setup	
	E Company Details	
	Business Rules	
	Workflow Processes	

Here a user can configure the templates and emails that can then be used against their employee records.

HOME SYSTEM SETUP PERSONN	EL TRAINING RECRUITMENT	REPORTS UPDAT	ES DOCUMENTS	HELP
🗼 💣 🙆 🏻 🕒 🗢		N 🚠 🙃 🛛		
ompany Work Employee Time & Training Attendance	Recruitment Company System Scr Details Parameters Desi	een Business Security I gner Processes	Documents	
	System Setup		Personnel	•
			Training	•
	•		Recruitment	•
			Email	•
	Personnel System	Setup	Document Groups	
			Clear Locked Docu	ments
	📰 Company Detai	ls		
	Business Rules			



Employee Search

Here a user can utilise the search function to locate current and leaver records.

Personnel Manager		Search Results:					
	Employee ID:	ID	Surname д	Other Names 🛛 🛆	Department	Location 	
	Surname:	1	Abbott	Albert	Management	London	
🔀 System Setup	Forename:	2	Adams	Matthew	Sales	London	
	Forenanie.	25	Ainsworth	Julie	Sales	London	
<u> </u>		26	Alcock	Vicky	Sales	London	
🔍 Employee Search	Payroll ID:	3	Bathley	Catherine	Management	London =	
•	NI Number:	4	Beasley	James	Management	London	
	Include Leavers	29	Brown	James	Production	London	
🔀 Add Employee		32	Burton	Domonic	Production	Leeds	
		27	Butler	Adam	Production	London	
		30	Clark	Simon	Production	London	
Attendance Planner		10	Cockrill	Loyd	Production	London	
		40	Colins	Sam	Administratio	n Birmingham	
		5	Cooke	Jenny	Accounts	London	
 Organisation Charts 		15	Cooper	Rodger	Production	Leeds	
	Main	17	Eden	John	Production	Leeds	
, P		11	Emmerson	Kieth	Sales	London	
Reports	Date	18	Empson	Phillip	Production	Leeds	
AREA -	Work	13	Falkner	Sam	Production	London	
		31	Glover	Jane	Sales	London	
	Dept/Loc	19	Graham	Jane	Administration	n Leeds	
Back	Course	10	1100	·	A distribute	• • • • • • • • •	
	Training Needs	Sea	arch Select	Close	Print Exp	port Clear All	

- Select Employee search from the dashboard
- To locate a current employee from here enter their name
- Press enter or select search.
- For a leaver enter the name check 'include leavers'
- Select search.



It is possible to search by employment dates.

Personnel Manager	Search Results:						
	All Employees	ID	Surname 🛆	Other Names 🛛 🛆	Department	Location	•
	Starting	1	Abbott	Albert	Management	London	
🔀 System Setup	Leaving	2	Adams	Matthew	Sales	London	
	- County	25	Ainsworth	Julie	Sales	London	
A	🛛 between	26	Alcock	Vicky	Sales	London	
🔍 Employee Search	and	3	Bathley	Catherine	Management	London	=
•		4	Beasley	James	Management	London	
	🗢 during the last 🛛 🚔 days	29	Brown	James	Production	London	
🄀 Add Employee		32	Burton	Domonic	Production	Leeds	
		27	Butler	Adam	Production	London	
Attendance Planner		30	Clark	Simon	Production	London	
		10	Cockrill	Loyd	Production	London	
		40	Colins	Sam	Administration	n Birmingham	
		5	Cooke	Jenny	Accounts	London	
🕂 Organisation Charts		15	Cooper	Rodger	Production	Leeds	
	Main	17	Eden	John	Production	Leeds	
P		11	Emmerson	Kieth	Sales	London	
Reports	Date	18	Empson	Phillip	Production	Leeds	
	Work	13	Falkner	Sam	Production	London	
		31	Glover	Jane	Sales	London	
	Dept/Loc	19	Graham	Jane	Administration	n Leeds	
Back	Course	10	1.00	r	A J		•
	Training Needs	Sea	rch Select	Close	Print Eq.	oort Clear	Al

Here a user can search by reporting line, employment type or employee groups.

eports To:	ID	Surname 🛆	Other Names 🛛 🛆	Department	Location	
	1	Abbott	Albert	Management	London	
Employment Type:	2	Adams	Matthew	Sales	London	
	- 25	Ainsworth	Julie	Sales	London	-
Employee Group:	26	Alcock	Vicky	Sales	London	
inployee Gloup.	3	Bathley	Catherine	Management	London	=
	- 4	Beasley	James	Management	London	
	29	Brown	James	Production	London	-
	32	Burton	Domonic	Production	Leeds	
	27	Butler	Adam	Production	London	-
	30	Clark	Simon	Production	London	-
	10	Cockrill	Loyd	Production	London	
	40	Colins	Sam	Administration	Birmingham	
	5	Cooke	Jenny	Accounts	London	-
	15	Cooper	Rodger	Production	Leeds	-
Main	17	Eden	John	Production	Leeds	-
	11	Emmerson	Kieth	Sales	London	-
Date	18	Empson	Phillip	Production	Leeds	-
Nork	13	Falkner	Sam	Production	London	-
	31	Glover	Jane	Sales	London	-
Dept/Loc	19	Graham	Jane	Administration	Leeds	-
Course	10	1.00	C	A .J	1	•
Training Needs	Sea	arch Select	Close	Print Exp	ort Clear	AI



Here a user can locate an employee via their department, location or post.

Department:	ID	Surname	∆ Ot	her Names	Δ	Department	Locatio	on 🔺
	- 1	Abbott	Alt	ert		Managemen	t Londo	n
	2	Adams	Ma	tthew		Sales	Londo	n
Location:	25	Ainsworth	Jul	e		Sales	Londo	n
	- 26	Alcock	Vic	ky		Sales	Londo	n
	3	Bathley	Ca	therine		Managemen	t Londo	n 🗉
Post:	4	Beasley	Jan	nes		Managemen	t Londo	n
	- 29	Brown	Jan	nes		Production	Londo	n
	32	Burton	Do	monic		Production	Leeds	
	27	Butler	Ad	am		Production	Londo	n
	30	Clark	Sin	non		Production	Londo	n
	10	Cockrill	Loy	/d		Production	Londo	n
	40	Colins	Sar	n		Administrati	on Birmin	gham
	5	Cooke	Jer	ny		Accounts	Londo	n
	15	Cooper	Ro	dger		Production	Leeds	
Main	17	Eden	Joh	in		Production	Leeds	
_	11	Emmerson	Kie	th		Sales	Londo	n
Date	18	Empson	Ph	llip		Production	Leeds	
Work	13	Falkner	Sar	n		Production	Londo	n
	31	Glover	Jan	e		Sales	Londo	n
Dept/Loc	19	Graham	Jan	e		Administrati	on Leeds	
Course	10	1.00	e	-		A		•
Louise								
Training Needs	Sea	rch Se	elect	Close	P	rint E	Seport	Clear Al

To use the employee tree to expand on forename, surname simply expand the section.





Creating a New Employee

From the dashboard a user can create their new starters and allow the system to calculate their prorata holiday entitlement based on the values set in the system parameters.

	Employee Details:	Address Details:
	Employee ID:	Address:
	Sumame:	
Personnel Manager	Forename:	
	Other Names:	
	Known As:	
🔀 System Setup	Title:	Postcode:
	DOB/Age:	Telephone:
Employee Search	0 years 0 months O Male O Female	Mobile:
🎗 Employee Search		Email:
	Job and Salary Details: Start Date: 28/08/2015	Contact Type:
🔥 Add Employee	Post:	
	Basic / Pro Rata £0.00 £0.00	Holiday Details:
Attendance Planner	Salary:	Holiday Profile / Tear: Holiday Tear V 2015
- Attendance Planner	Pay Period:	Start Date: 01/01/2015
•	Employment Type:	End Date: 31/12/2015
🚹 Organisation Charts	Hierarchy:	Set Clear Bank Holiday Profile:
		Annual Entitlement: 28
Reports	Employee Notice:	Entitlement This Year: 10 Hours
	Security Level: 0	
	Working Hours: 37.5 37.5 1 (Actual/Full Time/FTE)	
Back		These fields must be entered.
		< Back Finish Cancel Heb
		This number relates
		to employee license
Select Add Employee		remaining.

- Enter the necessary information
- Click finish



On saving the employee and saying YES to enter additional details, it is possible to create their Self Service account if that module is subscribed to.

Integration Details:					
Company E-mail:					
Create Accounts For:	Timesheets				
	Time and Atten	dance			
	Self Service				
	Self Service D	etails:			
	Username:				
	Password:				
	Profile:	Employee		-	
			OK	Cancel	



Employee Maintenance

Once an employee record has been saved there will then be a number of tabs relating to the individual whereby all employee personnel information can be recorded and reported on. Utilize the side menu on the record to navigate to the different sections of the record, these tabs will display across the top of the record.

PERSONAL

This tab the user can utilize to record the employees personal information such as their address etc.

	Personal Details:		Personal Details:		
	Employee ID:	1	NI Number:	AA 123321 A	Absences
	Sumame:	Abbott	Marital Status:	Married -	
	Forename:	Albert	Dependants:	0	
lbert Abbott	Other Names:		Nationality:	British	
uman Resources Manager	Known As:	Albert	Ethnic Origin:	UK European 🔹	
lanagement			-		Holidays
ondon	Title:	Mr	Religion:	Catholic •	
eports To:	DOB/Age:	02/05/1958	Home Status:	Owner 🔻	
atherine Bathley	57 years 4 months	🧿 Male 🔘 Female		Registered Disabled	
	Contact Details:				
	Date Co	ntact Type M Address 1	Address 2	Address 3	
ersonal	05/01/2006 Ho	me 📝 92	Church La	ne London	Click the charts for more information
/ork					
ttendance					Employment Calculator
					Book Holiday
aining / Qualifications					Record Absence
ocs / Contracts	4				Record Absence
	4			•	Attendance Record
ther			Add	Jpdate Delete	Holiday Card

- To amend any of the fields click into the box
- Enter the data
- Save the changes

To add an address:

- Select add
- Enter the new address tick main contact

Users can either 'Add' the new address and check 'New' as the main contact to retain previous addresses or alternatively update the existing address.

Selecting the different tabs from the top will allow the user to navigate to the employees bank details, emergency contact etc.



EMERGENCY CONTACTS

Here the user is detailing an employee's emergency contact information and also medical information such as doctors contact information.

	Emergency Conta	ct:	Emergency Contact:	
	Name:	Sarah Abbott	Name:	Absences
	Relationship:	Wife -	Relationship:	•
	Address:	92	Address:	
lbert Abbott		Church Lane		
Human Resources Manager		London		
Management London				Holidays
Reports To:	Postcode:	SW12 1AA	Postcode:	
Catherine Bathley	Contact Tel 1	0207 462982	Contact Tel 1:	
·	Contact Tel. 2:		Contact Tel. 2:	
Personal	Medical Details: -		Medical Details:	Click the charts for more
Nork	Name:		Telephone 1:	information
	Address:		Telephone 2:	Employment Calculator
Attendance			Notes:	
raining / Qualifications				Book Holiday
ocs / Contracts				Record Absence
Other	Postcode:			Attendance Record
				Holiday Card
				Save Cancel

RIGHT TO WORK

Here the users can enter passport and visa information and also update the notice periods.

	Work Permit Details: Work Permit		Visa Details: Valid From:			Absences
	Work Permit Expires:		Expiry Date:			hosenees
	Duration:	D	Type of Visa:		-	
ert Abbott	Type of Permit:		Notes:			
man Resources Manager	Notes:					_
nagement	Notes.					Holidays
ndon		-				
ports To:						
herine Bathley		*			*	
	Passport Details:		Notice Periods:			
sonal	Passport:		Employee Notice:	2 Months	-	Click the charts for more
	Passport Issued:		Employer Notice:	2 Months	•	information
ork	Passport Expires:					
endance	Notes:					Employment Calculator
	NUCCO.					Book Holiday
ining / Qualifications						Record Absence
cs / Contracts						
er						Attendance Record
		Ψ.				Holiday Card
						Save Cancel
						Save Cancel



Expiry dates will create a task 6 months prior to the due date.



BANKING DETAILS

These sections a user can record the banking details of an employee utilizing Add to add a new and retain the previous ensuring main details is checked.



Update will override existing banking information. If the requirement is to retain the previous, select the Add function.

bert Abbott uman Resources Manager anagement ondon sports To: therine Bathley	ak Name Address 3C 13 Sloan		Address 3	Address 4	Absences
bert Abbott uman Resources Manager anagement undon eports To:		ie Sq Londoń			0
aman Resources Manager anagement ndon .ports To:					
nagement Idon ports To:					
eports To:					
eports To:					Holidays
eports Io:				•	
therine Bathley		Ade	d Update	Delete	
		Ado	Update	Delète	
ersonal					Click the charts for more
ork					information
tendance					Employment Calculator
aining / Qualifications					Book Holiday
					Record Absence
ocs / Contracts					Attendance Record
ther					Holiday Card
					Save Cancel

lame:	HSBC	ОК
Address:	13 Sloane Sq	Cancel
	London	
Postcode:	SW1 8SB	
Account Name:	Mr Albert Abbott	
Sort Code:	00-00-00	
Account Number:	0000000	
Roll Number:		
	Main Details	



LEAVER

To record leaving dates enter the dates into the relevant fields and save the record. When the employee does leave check the 'left' box and enter the reason.

	Leaver Details:	Leaver Notes:	
ert Abbott man Resources Manager nagement don orts To: herine Bathley	Left Last Day of Employment: Reason: R	•	Absences Holidays
sonal rk			Click the charts for more information
endance			Employment Calculator
ning / Qualifications			Book Holiday
s / Contracts			Record Absence
er			Attendance Record
			Holiday Card
			Save Cancel



On marking an employee as a leaver the system will ask the user to also close any tasks and populate the end date onto the job/salary record.

The remaining leave with be calculated

pro-rata





A record can be re-activated if a leaver return by unechecking the left box and adding a new job record which is detailed later in this manaul.



WORK

Within this tab the user can enter information such as the date commenced with the company, continuous service date etc.

Company email is important to allow users to email from this system.

	Work Job / Salary	Shifts Benefits / V	hicles Appraisal Disciplinary / Grievance	LURGENT TASKS
N N	Date Commenced:	05/01/2006	Company E-mail: a.abbott@simplydemo.	ab
	9 years 8 months			Absences
		On Fixed Term	Security Level: 0	
Albert Abbott	Fixed Term End Dat	e:	How Recruited:	
Human Resources Manager	Employment Type:	Full Time	Recruitment £0.00	
Management	Internal Extension:			
London	Continuous Service		Payroll Information:	Holidays
Reports To:	Date: 0 years 0 months		Payroll Number: 01	
Catherine Bathley	Length of Service Profile:	LOS 1		
	Working Duration (D		Picture:	
Personal	Monday:	1 07:3		Click the charts for more
	Tuesday:	1 07:3		information
Work	Wednesday:	1 07:3	art	Employment Calculator
Attendance	Thursday:	1 07:3		
Training / Qualifications	Friday:	1 07:3		Book Holiday
	Saturday:	0 07:3		Record Absence
Docs / Contracts	Sunday:	0 07:3		titles from Decord
Other	ounday.	07.3	Import Clear	Attendance Record
			import Cear	Holiday Card
				Save Cancel

The user can also link the length of service profile from the business rules.

Browse to a computer drive and import the employee's picture.



Internal Extension will feed through to the phone list within the Self Service module.



JOB/ SALARY

This page is where a user records and maintains an employee's job and salary information, the page is split into two sections as salary may increase however job information may remain the same.

	Tasks From	То	Post		Location	Department	Absences
	28/08/2015			sources	London	Management	
	05/01/2006	27/08/2015	Administra	ator	London	Management	
Albert Abbott							
Human Resources Manager							
Management							Holidays
London			_				nondays
Reports To:	4	Ш				•	
Catherine Bathley				Add	Update.	. Delete	
	Salary History:						
Personal	Tasks From	То	Pay	Post	l.	lotes	Click the charts for more
Personal	01/09/2015		30000.00	Human	Resources		information
Work	05/01/2006	31/08/2015	27000.00	Human	Resources		
Attendance							Employment Calculator
							Book Holiday
Training / Qualifications							Record Absence
Docs / Contracts	4						Record Absence
Other	•		III	_			Attendance Record
other				Add	Update.	Delete	Holiday Card
							Save Cancel



The update function will override the existing data therefore losing any previous job/salary information. Utilize the Add function to retain historical salary and job history.



Job History

The top section of the job salary page is designated for within the employee's job for example a change in post or manager. From and to dates will allow the user to track the most recent job information should an employee change role, the, from date would automatically transfer as the to date on the previous role.

Work Job / Salary Shifts Benefits / Vehicles Appraisal Disciplinary / Grievan	
Job History:	L URGENT TASKS
Tasks From To Post Location	Department Absences
28/08/2015 Human Resources London	Management
05/01/2006 27/08/2015 Administrator London	Management
Enter Details X	
From: 28/08//2013 Additional Jobs: This employee has Save	Holidays
To: 0 additional jobs. Set Cancel	nonudys
Post: Human Resources Manager Tasks Add Update	Delete
Reports To: Bathley, Catherine Set Clear	
Hierarchy: London -> Management Set Clear	
Post Note 0.00 Human Resources	Click the charts for more
Hours per Week: 0 Full Time Hours: 0 0.00 Human Resources	information
FTE Value: 1	Employment Calculator
Salary Band:	Book Holiday
Pay / Period: £30,000.00	Record Absence
Change Reason:	
Notes: Add., Update.,	Attendance Record
Add Opuale	Holiday Card
	Save Cancel
 Select Add below the job section 	
-	
 Enter the new job information 	the sector should be a set of the sector sector sector
Select Save	Here is also where the user sets
	the banding



The update function will allow the user to amend existing information it will not retain the previous job information this functionality will override.

Delete will completely delete the job record.



ADDITIONAL JOBS

Here a user can enter details if an employee has an additional job.

	Work From: 28/08/2015 Additional Jobs: J To: To: Cancel
	Enter Details X
	Additional Jobs:
Albert Abbott	From To Post Location Department
Human Resources Mana	There are no items to show.
Management	idays
London	
Reports To: Catherine Bathley	
Personal Work	Add Update Delete Close charts for more rmation
Attendance	Employment Calculator
Training / Qualification	Book Holiday
	Record Absence
Docs / Contracts	Attendance Record
Other	AddDelete
	Holiday Card
	Save Cancel

- Select Set within the additional jobs section
- The additional jobs dialog box will appear
- Select Add

	Enter Details	×
From:	28/08/2015	Save
To:		Cancel
Post:	▼	
Reports To:	Set Clear	
Hierarchy:		Set Clear
Hours per Week: FTE Value: Notes:	37.5 Full Time Hours: 37.5 1	
		^
		-

- Enter the relevant details
- Save the record



Salary History

Within this section a user is detailing an employee's salary and when this change came into effect and can also detail the change reason.

		Enter Details	 X	Abbott,Albert	– = ×
From: To: Salary Award Date: Period:	05/01/2006 31/08/2015	Daily Absence Cost: 0.00 Enter a value which best describes the daily cost to your organisation of this person being absent. You can use this for reporting in Simply Answers.	Save Cancel Tasks Calculations	aisal Disciplinary / Grievance Location Department ces London Management London Management	URGENT TASKS Absences
Post: Salary Grade: Salary:	Human Resources Mar	FTE Value: 1 The FTE value is set on the employee job record and is used to calculate the pro-rata salary.			Holidays
Monthly Salary: Pro Rata Salary: Hourly Rate: Overtime Rate:	2,250.00 27,000.00 0.00000 0.00000	Currency Code:		Add Update Delete	Click the charts for more
Double Time Rate: Total Salary Package:	0.00000	Salary Sacrificed: 0.00 Sacrifice Notes:		uman Resources uman Resources	Click the charts for more information Employment Calculator
					Book Holiday Record Absence
Change Reason: Notes:				Add Update Delete	Attendance Record Holiday Card Save Cancel
-					

- Select Add
- Enter the information with the dates as to when the new salary came into effect
- Select save



The 'To and 'From' dates within the job history and salary history section are important as they will highlight the current job details. End dates on a record can cause the system to view the employee as a leaver.



SHIFTS

This tab will allow the user to assign a new working pattern or check the pattern an employee is on by selecting the 3 dots beside 'defaults work period'

						Period: Full Tim	-			Absences
		Work	Period Ma	intenance			x			
n								items to show.		
Details:	Full Time									
Name:										Holidays
Description:	Full time									
	Is Active									
-		- 1	Grace IN	Grace OUT		Work Hours				Click the charts for more information
	Start Time	End Time	(mins)	(mins)	Break Hours	(hrs)	Days			information
Monday	00:00	00:00	0	0	00:00	07:30	1			Employment Calculator
Tuesday	00:00	00:00	0	0	00:00	07:30	1			Book Holiday
✓ Wednesday	00:00	00:00	0	0	00:00	07:30	1			Record Absence
Thursday	00:00	00:00	0	0	00:00	07:30	1			
 Friday 	00:00	00:00	0	0	00:00	07:30	1	Add Upda	ate Delete	Attendance Record
Saturday Saturday	00:00	00:00	0	0	00:00	00:00	0	- Opus	Delete	Holiday Card
Sunday	00:00	00:00	0	0	00:00	00:00	0			Save Cancel
					0:00	37:30	5.00			

- To assign a shift pattern select add
- Select OK

	tart End Shift	Description	
		items to show.	
t Abbott	There are no	items to show.	
an Resources Manager			_
agement	Enter D	etails X	Holidays
on	Details:	ок	
ts To: rine Bathley	Shift: Night Staff	Cancel	
rine Bathley	Start: 09/09/2015	Califer	
	End: 09/09/2022		
onal)	Click the charts for more
k			information
ndance			Employment Calculator
ning / Qualifications			Book Holiday
/ Contracts			Record Absence
			Attendance Record
r		Add Update Delete	Holiday Card
			Course Coursel
			Save Cancel



BENEFITS & VEHICLES

Here the user can detail employee's benefits such as bonuses or Pension information. Company vehicles can also be entered.

	Benefits: Tasks Benefit	Start End	Number Value Notes	Absences
	Laptop	10/05/2015	1 300.00	
	Mobile Phone	10/05/2010	1 100.00	
bert Abbott				
uman Resources Manager				
lanagement	4	Ш	•	Holidays
ondon		Add	Update Delete	Tondays
eports To:	Vehicle History:			
atherine Bathley	Tasks Date Issued Make	Model	Registration Colour	
	10/05/2014 BMW	Model	Black	
ersonal				Click the charts for more
				information
/ork				Employment Calculator
ttendance	•		۱. ۲	
raining / Qualifications		Add	Update Delete	Book Holiday
				Record Absence
ocs / Contracts	Driving Licence Details:	licer	ce Issued:	Attendance Record
ther	Driving Licence:		ce Expires:	Attendance Record
		600		Holiday Card
				Save Cancel

- To add to benefit select add
- Enter the details
- Select save

Benefit:	Bonus		•	Notes:					Save
Start Date:	09/09/2015								Cancel
End Date:									Tasks
Number:	1								
Value:	£0.00	GBP	•					•	
PHI Benefit Membership				Dependants:			_		
Membership				Dependants:	Forename	Relationship	Enrolme	Date of	Curre
	Number:					Relationship re are no items to		Date of	Curre
Membership Type:	Number:							Date of	Curre
Type: Enrolment D	Number:								Curre



VEHICLE

To enter vehicle information this can be a company car or an allowance.

			Tasks Benefit	Sta		Number Valu		Absences
			Laptop		/05/2015	1 300.0		
		Enter Detail	Mahila Dhana	10 X	⁽⁰ 5/2010	1 100.0	00	
sued:	10/05/2014	Returned:		Save	5			
ake:	BMW]	Closed	Cancel			•	Holidays
odel:		Reg:		Tasks	Add	Update	Delete	
olour:	Black	Engine Size:	2.0					
uel Type:	diesel	Approved CO2:			Model	Registration Cold	our	
rst egistered:		Allowance:	0.00 •			Blac	k	
Insurance I	Details:							Click the charts for more information
Company:		Start Date:						Employment Calculator
Policy Number:		End Date:					•	
Value:	0.00				Add	Update	Delete	Book Holiday
Details:								Record Absence
				-	Licence	e Issued:		Attendance Record
				•	Licence	e Expires:		Holiday Card
Notes:								Save Cancel
								Curreer Curreer
				-		1	1	
						(

- Select add
- Enter the details
- Select Save

License information can also be recorded at the bottom and expiry dates will set the admin a reminder in the task list.



APPRAISAL

This section can be used to record appraisal reviews, 1-2-1's and performance Stats. A user can also utilize the next review section to set reminders.

	Work Job / Salary Shifts Benefits / Vehicles Appraisal Disciplinary / Grievance Details:	
Albert Abbott		
Human Resources Manager		
Management London	Holidays	
Reports To:		
Catherine Bathley	Add Update Delete	
Personal	Click the charts for m information	ore
Work		
Attendance	Employment Calco	_
Training / Qualifications	Book Holiday	
Docs / Contracts	Record Absen	ce 👘
Other	Attendance Rec	ord
	Holiday Card	
	Save	incel

- Select add
- Enter the details
- Select save

eview Date:	09/09/2015	Closed	Save
eviewed By:			Cancel
ext Review:			Tasks
Notes:			
			-
Action Plan:			
			•
			•



DISCIPLINARY AND GRIEVANCE

This section can be used for recording disciplinary information and also grievance information utilizing appeal dates to set reminders for meetings.

	Tasks Action Date Problem	here are no items to show.	ction Type A	ppeal Date	Absences	
lbert Abbott						
luman Resources Manager						
Management					Holidays	
ondon	4			•		
Reports To: Catherine Bathley		Add	Update	Delete		
	Grievance:					
ersonal	Tasks Date Details	T	o Be Actioned A	ction Date	Click the charts for more	
Vork	T	here are no items to show.			information	
Attendance					Employment Calculator	
raining / Qualifications					Book Holiday	
ocs / Contracts					Record Absence	
	•	ш		•	Attendance Record	
Other		Add	Update	Delete	Holiday Card	۲
					Save Cancel	

DISCIPLINARY

- Select Add
- Enter the details
- Select save

	Ente	r Details	x
Action Date:	09/09/2015	Closed	Save
Description:		•	Cancel Tasks
Action Type:	•		
Action:		•	
Appeal Date:			
Appeal Notes:		*	
Followup Notes:		^	



The action type list is populated from the business rules optional side. Appeal dates will create a reminder.



GRIEVANCE

This section is used to record grievance dates and key information

- Select add
- Enter the dates and data
- Select save

		Tasks Action Date Pr		Action T	ype Appeal Date	Absences	
			There are n	o items to show.			
Albert Abbott							
Human Resource	s Manager						
Management						Holidays	
London	Enter De	ataile	x		•		
				Add Upo	ate Delete		
Grievance Date: 09/09/ Details:	/2015	Closed	Save				
Details:		* *	Cancel	To Be A	ctioned Action Date		
To Be Actioned By:			Tasks	items to show.		Click the charts for mo information	e
Action Date:							
Action Description:						Employment Calcula	tor
		-				Book Holiday	
Follow Up Notes:						Record Absence	
			-		•	Attendance Record	d
				Add Upo	late Delete	Holiday Card	
				-		Save Can	cel



ATTENDANCE

This section will refer to the attendance of an employee to allow a user to specify the individual's holiday entitlement and sickness recording.

Absence

This section is used for recording individual's sickness record; the top section is where the user can list absences and their reasons.

This will then add into the pie chart to the left of the record.

	Absence Holidays Absences: From: 01/01/2015	To: 31/12/2	2015				URGENT TASKS Absences
	Tasks Category	Reason	Start	End	Duration	Hours	
	Sick	Flu	15/01/2015	16/01/2015	2.00	15:00	
Albert Abbott Human Resources Manager							
Management							
London							Holidays
Reports To:	•	Ш				•	
Catherine Bathley	Only Show Absence	Scheme Records	Add	Update.	D	elete	
· ·							
	Entitlement Profile:	Manager	•				
Personal	Absences:	1					Click the charts for more information
Work	Total Duration:	2.00					
Attendance	Paid at Full Rate:	0.00					Employment Calculator
T	Paid at Reduced Rate:	0.00					Book Holiday
Training / Qualifications	Unpaid:	2.00					Record Absence
Docs / Contracts	Prevent paid entitlem	ent to be given					
Other	Bradførd Factor From 10/	0.001411-00.000	2015	2.00 🔐	Matemity /	Paternity /	Attendance Record
	Bradford Factor From 10/0	J9/2014 Until 09/09/.	2015:	2.00	SPL [®] Cal	lculator	Holiday Card
	/						Save Cancel
ere the user can ap							
ay rule set from the	business rules						



Checking a self-certificate, back to work and/or medical certificate are required will generate a task. If the Self Service module is subscribed to this will generate an email to the employee and to the manager for the back work. Absence reasons included in the absence scheme are predetermined within the business rules.



To add an absence:

- Select add
- Select a category which will then determine the reason list
- Select the relevant reason
- Enter the start and end dates the duration will calculate based on the assigned working pattern
- Stating a self-certification, medical certificate or back to work is required will add this as a task into the list until the user's states the dates they have been received.
- Select save

Category: Appointment Peason For Absence: Dertist Absences Scheme From: D9/09/2015 Hde in Self Service: No To: Duration (Days/He): 0_000 Medical Cettificate Required: Self Cettification From Required: Medical Cettificate Required: Self Cettification Received Back to Work Interview Required: Show on Task List (days): Medical Cettificate Expires: Show on Task List (days): Interview Notes: Employeer/Medical Comments: Comments: Employeer/Medical Comments: Employeer/Medical Comments: Save Cancel	E	nter Details	x	L URGENT TASKS
Interview Note:: Image: Contraction (Days/Hrs): Ima		•		Absences
From: 19/09/2015 Hide in Self Service: No Fo: Duration (Days/His): 0 0:000 Holidays Hedical Cetificate Required: Self Cetification Form Required: Self Cetification Received Back to Work Interview Required: Medical Examiner Consulted Back to Work Interview Required: Schedule Check Up Cal: Interview Notes: Comments: Employee/Medical Comments: Employee/Medical Comments: Employee/Medical Comments: Employee/Medical Comments: Solution (Days/His): Diate in the form of the		•	End Duration P	
Image: Constraining and a constraining a	_	Little in Colf Constant, Marcana	lasks 16/01/2015 2.00 1	5:00
Interview Notes: Comments: Employee/Medical Comments:		Hide in Self Service: No		
Iedical Certificate Required: Medical Certificate Received Medical Certificate Received Back to Work Interview Required: Medical Examiner Consulted Medical Examiner Consulted Medical Certification Received Back to Work Interview Required: Medical Examiner Consulted Medical Examiner Consulted Medical Examiner Consulted Interview Conducted: Interview Notes: Comments: Employee/Medical Comments: Employee/Medical Comments: Matembty / Patemtty / Matembty / Patemtty / Matembty / Patemtty / Holiday Card Save				Holidays
Medical Certificate Received Medical Certificate Expires: Back to Work Date: Medical Examiner Consulted Back to Work Interview Required: Schedule Check Up Call: Interview Conducted: Interview Notes: Employee/Medical Comments: Employee/Medical Comments: Employee/Medical Comments: Save Cancel	ledical Certificate Required:	Self Certification Form Required:		
Medical Examiner Consulted ack to Work Interview Required: Schedule Check Up Call: interview Conducted: interview Notes: Comments: Employeer/Medical Comments: Employeer/Medical Comments: Maternity / Paternity / Maternity / Paternity / Maternity / Paternity / Attendance Record Holiday Card Save Cancel	Medical Certificate Received	Self Certification Received	Update Dele	
ack to Work Interview Required: Schedule Check Up Cal: interview Conducted: interview Notes: Comments: Employee/Medical Comments: Employee/Medical Comments: Statemativ / Paternity / Maternity / Paternity / Maternity / Paternity / Maternity / Paternity / Statemativ / Paternity / Save Cancel	Medical Certificate Expires:	Back to Work Date:		
Schedule Check Up Call: Show on Task List (days): Image: Conducted By: Image: Book Holiday Interview Notes: Conducted By: Image: Book Holiday Record Absence Comments: Employee/Medical Comments: Matemity / Patemity / Book Holiday Holiday Card Save Cancel		Medical Examiner Consulted		
Interview Conducted : Interview Notes: I	lack to Work Interview Required:			Employment Calculator
Interview Notes: Comments: Employee/Medical Comments: Employee/Medical Comments: Comme		Show on Task List (days): 0		Book Holiday
Comments:		Conducted By:		
Comments:	Interview Notes:		▲	
Comments:			Matemity / Pa	temity /
Save Cancel	Comments:	Employee/Medical Comments:	SPL Calcu	ator Holiday Card
• • • • • • • • • • • • • • • • • • •				Save Cancel
		Th	e absence scheme scor	e will begin

to calulate here based on the rules configured in the business rules.



Maternity/Paternity Calculator

This can be found on the employee's absence page or from the Personnel tab from the toolbar

- Select add
- Locate the employee
- Enter the expected dates
- To add the absence to the record ensure 'create absence is selected'
- Select save

,			Maternity / Paterni	ty / SPL			×
Dep Loc	eria: vartment: < <all>> vartment: <<all>> vartion: <<all>> ployee Group: <<all>></all></all></all></all>	• • •	Show Leave Between: Start Date: 09/03/2015 End Date: 09/09/2016 Include Leavers	Print Options: Include Mate	-	Yreview	
N		Ma	iternity / SPL		× eturn Date Pai	id AML SPL Requ SPL Ends	
	Details					11/2016 🕅 01/03/2017	
	Employee:	1 - Albert Abbott			Cancel	11/2010 💌 01/05/2017	-
Γ	Expected Date of Childbirth:	08/04/2016		_	Concer		
	Qualifying Week:	25/12/2015					
	Continuous Weeks Service:	535					
	Earliest Start Date:	22/01/2016	Start Date Due to Pregnancy Related Illness:	11/03/2016			
	Actual Start Date:	02/03/2016	Additional Maternity Leave / SPI	L	Add	Update Delete	
	Ordinary Maternity Leave Return Date:	31/08/2016	Additional Maternity Leave Return Date:	01/03/2017			
	Actual Return Date:		Paid AML Ends:	29/11/2016	al End Quali	fies f SPL Reque SPL Ends	
1	6 Weeks SMP Salary:	£139.58					
		SPL Requested					
	SPL Entitlement End Date:	01/03/2017					
	Notes						
				•	Add	. Update Delete	
				•	Create		



To apply to the employees absence page select 'create absence'



HOLIDAYS

Here a user can define an individual's holiday entitlement, any additional entitlement and boOK holidays on their behalf. The system will then deduct and reduce the annual entitlement in-line with this.

	Holiday Years:						
					Additio Ba		bsences
	Holiday Year 2	015 28	.00 0.00		0.00 En	gland a	
Albert Abbott							
Human Resources Manager							
Management						н	olidays
London	4						
Reports To:					_		
Catherine Bathley	Normal Entitlement: 2	B Accr	ual Ad	d Upda	te Del	ete	
	Holidays:					_	
Personal	Tasks Year Number	Start Date	End Date	Taken Hour	s Narrativ	•	lick the charts for more
ersonar	2015	02/09/2015	02/09/2015	1.00 7:30			formation
Nork	2015	25/08/2015	28/08/2015	4.00 30:00		_	
Attendance							Employment Calculator
Training / Qualifications							Book Holiday
Docs / Contracts	4	Ш				•	Record Absence
	Total Annual Entitlemen	it (This Year): 28	.00 Ad	d Upda	te Del	ete	Attendance Record
Other	Taken / Allocated / Re	maining: 5.0	0.00	23.00			
							Holiday Card
							Save Cancel



The Add functionality will add a new; the update functionality will update and override an existing the delete functionality will delete.



HOLIDAY YEARS

This section of the attendance tab a user can amend the individual's holiday entitlement, and also add additional entitlement.

- Select update to open the holiday year
- Manually amend the duration

	Enter Details	x	- Abbott.A	lbert		– 🗆 🗙
loliday Year:		Save				
loliday Profile:	Holiday Year	Cancel				URGENT TASKS
łoliday Year:	2015		Irought Forw	Ho Additio	Bank Holi	Absences
itart Date:	01/01/2015		.00	0.00	England a	HUGCIICCO
ind Date:	31/12/2015				_	
lank Holiday Profile:	England and Wales	•				
intitlements: Juration This Year:	28.00 Hours					Holidays
Juration Carried Forward:	0.00					Holidays
Additional Entitlements:	0.00				•	
Description	Entitlem Added Expires	Add	Add	Update	Delete	
Length of Service	2.00 02/09/2015	Update				
		Delete	ite Taken	Hours Na	rrative	Click the charts for more
		Buddo	2015 1.00	7:30		information
otal Entitlement:	30.00		2015 4.00	30:00		Employment Calculator
Closed						Book Holiday
Carry Forward: 🧿 All Dura	tion O Maximum of0.00				۱.	Record Absence
lotes:			Add	Update	Delete	Attendance Record
		•	0 23.00			Holiday Card
		•				Save Cancel

Additional Entitlements

- To add additional entitlements select Add
- Enter the description and the duration

	Entitlement	x
itlement Detail		
Details:		
Description:	TOIL	
Entitlement:	0.00 TOIL Used:	0.00
Date Added:	·	
Expiry Date:	(TOIL Only)	
Notes:		
		-
	OK Cance	el Help



HOLIDAYS

To add holidays dates to the record

- Select Add
- Enter the start and end date
- Select save

	Profile Name	: Year	Entitle	m Brought Fo	rw Ho	Additio	Bank Holi	Absences
	Holiday Year	2015	28.00	0.00		0.00	England a	
Albert Abbott								
Human Resources Manager								
Management								Holidays
London Reports To:	4		111				•	
	er Details		x	Add	Updat	e	Delete	
	Planner Colour:	<u> </u>	Save					
	Category:		Cancel	1d Date Tal		s Nan	ative	Click the charts for more
uration lays/Hrs): 00:00 (Deduct from TOIL		Tasks	/08/2015 1.0				information
Bank Holiday								Employment Calculator
Narrative:								Book Holiday
					_			Record Absence
				_			•	Record Absence
				Add	Updat	e	Delete	Attendance Record
			*	0.00 23	.00			Holiday Card
	_							
								Save Cancel



ACCRUAL

Users can utilize this system to calculate a zero contracts holiday accrual. This will relate back to the Weekly holiday accrual set within the business rules.

	Absence Holidays Holiday Years:		Holiday Accrual
		ear Entitlem.	Monthly Weekly
	Holiday Year 20	15 28.00	Details:
			The Next Update date will be calculated based on the Day to Update value. If this value is greater than the number of days in the month then the next update
Albert Abbott			will be calculated as the last day of the month.
Human Resources Manager			Please note that if you manually set the Next Update to a day that does not
Management			match the Day to Update then the following update will take place the next month, not later the same month.
London			For example, if the Day to Update is the 31st and you set the Next Update to
Reports To:	4	Ш	occur on the 10th of July then the following update will be the 31st August, not the 31st July or 10th August.
Catherine Bathley	Normal Entitlement: 28	Accrual	Use Accrual
	Holidays:		Monthly Accrual: 0 Day to Update: 31
	Tasks Year Number	Start Date End	Next Update: 31/10/2015 Last Updated:
Personal	2015	02/09/2015 02/0	
Work	2015	25/08/2015 28/0	
Attendance			
Training / Qualifications			OK Cancel Help
	4		Record Absence
Docs / Contracts	Total Annual Entitlemen	t (This Year): 28.00	Add Update Delete Attendance Record
Other	Taken / Allocated / Re		Add Update Delete Attendance Record
	Taken / Allocated / Re	maining: 5.00	Holiday Card
			Save Cancel
			Save

- Select accrual
- Enter the hours worked onto either the monthly or weekly calculator
- Select OK



TRAINING AND QUALIFICATIONS

This section a user can record an individual's courses and qualifications, to populate course and qualification drop downs this is within the business rules on the optional side.

	Training / Qualifications Training Needs/Profiles CPD Training: Tasks Date Course Duration CPD Hours Internal Status	A URGENT TASKS
		Absences
	There are no items to show.	
Albert Abbott		
Human Resources Manager		
Management		Holidays
London		Tiolidays
Reports To:	Status: < <all>> • New Add Details Delete</all>	
Catherine Bathley		
	Qualifications:	
Personal	Tasks Qualification Subject Date Passed Grade Expiry I	Click the charts for more
	There are no items to show.	information
Work		Employment Calculator
Attendance		
Training / Qualifications		Book Holiday
		Record Absence
Docs / Contracts	 ▲ 	Attendance Record
Other	Add Update Delete	
		Holiday Card
		Save Cancel


DOCS/CONTRACTS

Here a user can record notes, upload documents and merge document templates with the record from the business rules.

	Details:			URGENT TASKS
	Tasks Date Catego		tails	Absences
	IT	here are no items to show		
Albert Abbott				
Human Resources Manager				
Management				Holidays
London	4		•	
Reports To:		Add		
Catherine Bathley		Add	Update Delete	
Personal				Click the charts for more
Work				information
Attendance				Employment Calculator
Training / Qualifications				Book Holiday
Docs / Contracts				Record Absence
Other				Attendance Record
other				Holiday Card
				Save Cancel

NOTES

Here the user can enter notes about the employee and also create reminders based on their notes.

	Tasks Date	Category	Details	Absences
			items to show.	
Enter	Details	x		
Date: 09/09/2015		Save		
Category: Details:	•	Cancel		Holidays
Details.		Tasks		•
			Add Update	Delete
				Click the charts for more information
		•		Employment Calculator
Training / Qualifications		<u> </u>		Book Holiday
				Record Absence
Docs / Contracts				Attendance Record
Other				Holiday Card
	· · · · · · · · · · · · · · · · · · ·			Save Cancel

- Select Add
- Select a category created in the business rules



Documents and Contracts

Here the user can store documents and create mail merge letters on an employee record. Users can utilize the document group's filter to locate the relevant document.

	Notes Docs / Contracts Documents:]	L URGENT TASKS
	Document Group: < <all>></all>	•		Absences
	Date Created Description	Group	Linked	
Albert Abbott	06/05/2008 employment cont	ract merged at 06 Contract		
Human Resources Manager				
Management				
London				Holidays
Reports To:				
Catherine Bathley				
Personal				Click the charts for more information
Work				Employment Calculator
Attendance				Book Holiday
Training / Qualifications	•		•	Record Absence
Docs / Contracts	Mail Merge New Doc Insert Docume	ent Email Open Delete	Rename	
Other				Attendance Record
	Employee has a valid contract of employ	ment		Holiday Card
				Save Cancel
	k			
				7
Open will open a hig document.	ghlighted	Delete will completely remove the associated document	the	name will amend title of the hlighted document.



MAIL MERGE

This option will allow the user to merge a template already created from the business rules, merging the employee's information in-line with the relevant field.

	Documents:	<all>></all>	•		Absences	
	Date Created)escription	Group	Linked		
	06/05/2008 e		Employee Do	cument		x
Albert Abbott		Please Select A Docum	ent Employee Options			
Human Resources Manager			Employee Optiona			
Management		Absence Appraisal		PC REORDA	NICEREMENTLONGINAT	
London			e Review Flow Chart		Conserve allocit an players performance - forces and all all all all all all all all all all	
Reports To:		Contract Disciplinary		Conversion in setting stars - set	After pail is got, popul is given dates, and one arregisted, of exploring the pair for the billion of the set of pairs of particular set of the pairs from	
Catherine Bathley		 Bisciplinary Grievance Leaver New Starter 			na da sua genera mante a l'Anto de la trada de la mai lega na esta de la constante a la constante a la constante de la constante de la constante de la constante de la cons I na sua de la constante de la constan enconstante de la constante de la constante enconstante de la constante de la constante de la constante de	
Personal		⊕ Working Time		d sama i ki sa ng Park anggan Matang sakat sang sakat anggan sakat sa ng sa		e
Work Attendance						tor
Training / Qualifications	4	To add a document,	select the desired template from			
Docs / Contracts	Mail Merge New Doc		a new name for the document and utton.	Res Barging Asso. Testing Professional Con- Constant and Asso Constant and Asso Constant and Asso Constant and Asso Constant Asso Cons		
Other	Employee has a valid	New Document Name	e:		Preview	v 🗕
		Performance Review	Flow Chart	•		el
				ОК	Cancel Hel	p

- Select Mail Merge New Doc
- Select the template
- Click OK

Also determine which area of their job record to merge with using the checkboxes for selection.

Job Hist	Start Date	End Date	Post		Department	Location	
	28/08/2015			Resource	Management	Location	
	05/01/2006	27/08/2015			Management	London	
- Salary H	listory:						
Selec	t Start Date	End [Date	Salary		Pro Rata Salary	
M	01/09/201	5		30000.00		70000.00	
	05/01/200	6 31/08	/2015	27000.00		27000.00	
	Details:						
Select	t Type		Address		Postcode	Telephone	
	Home		92		SW121AA	0207 462982	



INSERT DOCUMENT

Here a user can browse to their machine and insert a document or create a new document.

	Notes Docs / Contracts Documents: Document Group: < <all>></all>		L URGENT TASKS
	Date Created Description	Group	Absences
	Insert Object	x Contract	
O Create from File orrs rsons Result Inserts th	ile: EA Browse Link e contents of the file as an object into ument so that you may activate §typing		Holidays Click the charts for more information
ork the progr tends	am which created it.	,	Employment Calculator Book Holiday Record Absence
ocs / Contracts	Mail Merge New Doc Insert Document En	nail Open Delete Rename	
ther	Employee has a valid contract of employment		Attendance Record Holiday Card Save Cancel



If the Self Service portal is subscribed to a user can 'link' documents which mean employee can open the document, the alternative is embedding. In linking the document the path is all that resides, should the document be removed from the location the path specifies the document will be lost from here also.



EMAIL

The email function will allow the user to select an email template created from the business rules and send to the record they are on. Utilizing the merge fields allows the system to extract the employee's information.

t Template				
New Starter		Email Details:	Save Options:	
New Star	ter	Address: O Work Email	Description:	
		 Contact Emai 	il 💮 Save Email	
		Copy in Sender: Do not send	Save Attachments	
		Attachments:		
		Attachment		Add
		There a	are no items to show.	Delete
Email:			Colored area the fields form the list the	
From Address:	donotreply@spdemo.com		Select one the fields from the list, the wish to update and then click on the	nsert
To:			button, or manually type the field when	e required.
CC:			[[Course.UserDefinedNumber10]] [[Course.UserDefinedNumber8]]	
BCC:			[[Course.UserDefinedNumber9]]	
Subject:			[[Employee.AnnualEntitlement]] [[Employee.CompanyEmail]]	
	Use HTML HTML Edito	or l	[[Employee.ContinuousServiceDate]] [[Employee.DateCommenced]]	
De dui	Dear [[Employee.Forename]],		[[Employee.DateLeft]] [[Employee.DateOfBirth]]	
			[[Employee.Dependants]]	
Body:		ess I would like to take this opportunity to congr	ratulate you [[[Employee.Disabled]]	
Body:	on your new position with us.			
Body:	on your new position with us.	of Service system to allow you to request bolidar	([Employee.DrivingLicenceExpires]]	
Body.	on your new position with us.	off Service system to allow you to request holidate eview policy documents,.	ay, amend [[Employee.DrivingLicenceExpires]] [[Employee.DrivingLicenceIssued]] [[Employee.EC1Address1]]	
Body:	on your new position with us. We have an online employee Se		([Employee.DrivingLicenceExpires]]	•
BODY:	on your new position with us. We have an online employee Se your personnel information and re		ay, amend [[Employee.DrivingLicenceExpires]] [[Employee.DrivingLicenceIssued]] [[Employee.EC1Address1]] [[Employee.EC1Address2]]	Insert
воду:	on your new position with us. We have an online employee Se your personnel information and re Here is the link:		ay, amend [[Employee.DrivingLicenceExpires]] [[Employee.DrivingLicenceIssued]] [[Employee.EC1Address1]] [[Employee.EC1Address2]] [[Employee.EC1Address3]]	▼ Insert
body:	on your new position with us. We have an online employee Se your personnel information and re Here is the link: www.spdemoselfservice.com		ay, amend [[Employee.DrivingLicenceExpires]] [[Employee.DrivingLicenceIssued]] [[Employee.EC1Address1]] [[Employee.EC1Address2]] [[Employee.EC1Address3]]	▼ Insert
soay:	on your new position with us. We have an online employee Se your personnel information and re Here is the link: www.spdemoselfservice.com		ay, amend [[Employee.DrivingLicenceExpires]] [[Employee.DrivingLicenceIssued]] [[Employee.EC1Address1]] [[Employee.EC1Address2]] [[Employee.EC1Address3]]	▼ Insert

- Select the relevant category
- Highlight the template
- Select the recipient's email address from the Email details
- Select Send



The correct SMTP settings must be configured within the system parameters in order to send emails.



OTHER

For in-depth workflow process help please see later in this manual.

	Processes Blank Page B	lank Page			L URGENT TASKS
	Tasks Description	Status	Date	Next Step	Absences
		There are no ite	ms to show.		
Albert Abbott					
Human Resources Manager					
Management					Holidays
London					
Reports To:					
Catherine Bathley					
Personal					Click the charts for more information
Work					Employment Calculator
Attendance					
Training / Qualifications					Book Holiday
Docs / Contracts					Record Absence
	4	Ш			Attendance Record
Other			Add	Update De	lete Holiday Card
					Holiday Card
					Save Cancel



QUICK LINKS





EMPLOYMENT CALCULATOR

User guide

Select a calculator

Maternity Pay and Leave Adoption Pay and Leave Ordinary Paternity Pay and Leave Redundancy Pay Statutory Sick Pay and Leave Statutory Annual Leave National Minimum Wage Tribunal Claims

Welcome to the Employment Calculator

This online tool has been designed for quick and easy calculations of potentially complex statutory rights and payments. Just click on the relevant topic listed on the left to access a calculator and print the results after you've entered your information.

A new scheme of Shared Parental Pay and Leave is in force in respect of employees whose child is born or adopted on or after 5 April 2015. Under this scheme, employees with a minimum of 26 weeks' continuous service have the choice to end their maternity or adoption leave on a date they specify and share the untaken balance of that leave (as shared parental leave) with their partner. Parents may also share any maternity or adoption pay if leave is taken during the maternity or adoption pay period.

Parents may take shared parental leave concurrently or at separate times. Eligible employees can switch from maternity or adoption leave to shared parental leave at any time. Both the employee and his or her partner have the right to take up to three separate periods of leave interspersed with periods of work up until the day before the anniversary of the child's birth or adoption placement. This has replaced **Additional Paternity Pay and Leave.** Please consult your Croner product for full details.

- From 5 April 2015 the rate of statutory adoption pay changes to be exactly the same as for statutory maternity pay. i.e. The first six weeks of SAP are paid at the rate of 90% of the employee's average weekly earnings.
- There are different rates and effective starting dates for the cap on a "week's pay" for the purpose of calculating Redundancy Pay and tribunal claims for Great Britain and Northern Ireland. In Northern Ireland the cap is £490 from 22 March 2015. In Great Britain the cap is £475 from 6 April 2015. The calculators use the rate and effective date for Great Britain.

ATTENDANCE RECORD





HOLIDAY CARD

The Holiday Card provides an overview of the employee's holiday record.

Employee:	Abbott, Albert			Print
Holiday Profile:	Holiday Year		•	Close
Holiday Year:	2015		•	
From:	01/01/2015	To:	31/12/2015	
Entitlement:	28.00	Total Ent.:	28.00	
Carried Forward:	0.00	Taken / Allocated:	5.00 0.00	
Additional Ent.:	0.00	Remaining:	23.00	
	🐷 Display Bank H	olidays when Prin	ting	
	🔽 Display Holiday	Year Notes		
0 D				
	nd Date Durati 2/09/2015 1.00	ion Notes		
	3/08/2015 4.00			
23/06/2013 20	/06/2013 4.00			



Personnel Toolbar

Only when the user is in an employee's record can the record be deleted or the ID number changed.



The navigation buttons allow a user to navigate to the next employee record, however the user must first open a record.

The tool-bar is very similar to the Personnel Dashboard.

HOME SYSTEM SETUP PERSONNEL	TRAINING RECRUITMENT REPORTS UPDATES DO	CUMENTS HELP	19 \$7
Personnel Dashboard Dashboard	Holiday Year Holiday Attendance Open Absence Maternity / Conflicts Paternity / SPL Attendance	Task Screen Designer Navigation	
	Personnel Manager	Dashboard –	□ x
	System Setup Employee Starch Add Employee Attendance Plance	Task Summary 1 2 URGENT TASKS 1 0 UPCOMING TASKS © 0 FUTURE TASKS	
	Organisation Charts	Simply Answers	
	Apports		
😨 🛱 D 🗿 🗖	W 🛞 Ø		<mark>8 1, ⊕ 12 0 2) 15 12 18 40 ⊕ 15 1629</mark> 17 9009/2015



Attendance Planner

Within this section a user can utilise a quick capture of their employee's attendance using the filter functionality to filter the employee or the type of attendance:





Open Absence Conflicts

Here the user can report if there are any open absences within the system or if there are any conflicting date ranges.

HOME SYSTEM SETUP PERSONNEL TRAINING RECRUITMENT REPORTS UPD	PDATES DOCUMENTS HELP	1
	Maternity / Task Togge Screen Previous Next ternity / Task Screen Deligner Inavigation	
Ø	Open Ended Absence Conflicts 🏾 🗶 🚽 🗆 🗡	
Personnel Manager	- Selection Citeria Department: <u>Edultacon</u> Location: (<altacon< th=""><th></th></altacon<>	
🔀 System Setup	Enrologee Gioup: (CALL2) - Dhroi: Helday: Course: ary	
	INT TASKS	

If there are any open absences or conflicts with the system a report will be produced to highlight where they exist.

Employee ID	Employee Name		Absence Co	nflicts With	Date	
15	Cooper,Rodger		Holiday	Holiday		
		Print	Select	Refresh	Close	

Selecting the conflict will allow the user to amend.



Task List

Here the user will firstly see a task summary on logging into the system breaking down into **Urgent**, **Upcoming** and **Future** tasks.

🔇 System Setup	Task Summary
Q Employee Search	1 2 URGENT TASKS
🔓 Add Employee	1 0 UPCOMING TASKS © 0 FUTURE TASKS
Attendance Planner	
organisation Charts	Simply Answers
Reports	





Organisation Chart

The organisation chart will be built based on reporting lines set within the system.

🔀 System Setup	Task Summary
Q Employee Search	1 43 URGENT TASKS
Se Add Employee	O UPCOMING TASKS O 1 FUTURE TASK
Attendance Planner	
organisation Charts	Simply Answers
Reports	

Select Organisation Charts.



Choosing to export using the Simply Personnel chart will open a separate application.

v Open Save Copy to Post Cha Clipboard to DI	nges Export to Page Print 3 HTML Setup Preview	Print People leaving within the next 60 of	People with an appraisal in the next 14 days lays	
		ersonnel [‡] Simply Org		
erome York iales Olrector toble: 07773 394673 mme: 01234 61494	Cartos King A Olivector Extension Mobile 07565 418374 Home: 0124 85366	simply p	ersonnel sational ing	Stuart Little Director of Accounts Extension: Mobie: 07556 886099 Home: 0124 871442
Juanita Reddy Sales Manager - Extension: Mobie: 07699 278584 Home: 01234 849586	Dotores C QA Manag - Extension: Mobile: 072 Home: 012	Load from Load fill		
Marc Moore Tele Sales Operator Extension Mobile: 07962 112082 Home: 01234 856218	Megan Mills QA Technician Extension: Mobile: 07559 696001 Home: 01234 813049	Tracey Chan Jurior Developer Extension: Mobile: 07671 881832 Home: 01234 846261	Kim Scarb CS Analysi Extension: Mobile: 074 Home: 012 Pergay Hol	Accountant Extension: 34 493409 Mobile: 07488 700380 Home: 01234 840426

Select either 'Load from database' or Close.



The system will use the legend identified in the toolbar to highlight New Starters, Future Starters People with a birthday within next 5 days etc.



The user can decide what to include within the organisation chart using the view option from the toolbar.

		7						
	hoto					_	New starters since the last 30 days People with a birthday within the next 5 days	
	ob Title		- 🚚	Page	Print	Ð	Future starters People with an appraisal in the next 14 days	
	Vame	st Changes	Export to	Page Setup	Print Preview	Print	People leaving within the next 60 days	
E	mployee Number	to DB	HTML	Setup				
E	xtension Number	Tools			Print		Legend	
N	Aobile Number						- SP Demo	
н	Home Phone Number							
s	ihow Horizontal	Andrea Ing						
	Advanced	Managing Di	rector					

Selecting a section of the chart and then right clicking will display the chart from the highlighted areas.



• Select 'Show Chart from here'



A user can also email the chart to the employees within that section of the chart.

nd Email			Andrea Ingram Managing Director	
Email		Johnny Scarborough Admin Director	Peter Watkins Secretary HR Manager	Wendy Poe Secretary Payroll Manager
From: Send To:	The department head: Johnny Scarborough	- Admin Director	Secretary _ HR Manager	Secretary
Subject:	The department head: Johnny Scarborough Department head and all employees in that department and lower down The whole Company	Sherry Davis Junior Admin	Marsha I Office Ma	McKay nager
Desc:				
		Jane Coble Junior Admin	HR Office	r
		Kevin Perkins Administrator		
	Cancel Send			
		George Cannon Junior Admin		
		Charlie Drake Junior Admin		

A user can drag and drop employees under different reporting managers to mark this change in the personnel system, from the toolbar select 'Post Changes to DB'.





Reports

It is from here that a user is able to utilise either predefined reports whereby certain reporting criteria can be changed such as periods of time. Reports can be exported to Excel or alternatively printed as they are.

🔇 System Setup	Task Summary
Employee Search	42 URGENT TASKS
	1 0 UPCOMING TASKS
Add Employee	1 FUTURE TASK
Attendance Planner	
🕂 Organisation Charts	Simply Answers
Reports	
Reports	

Select *Reports* from the dashboard.

Employee Reports	Holidays and Absences	^	Pay and Benefits	^
Employee Details	Holiday Card Report	=	Pay Details Report	=
Internal Phone List	Holiday List By Employee		Job Details Report	
Phone List by Dept/Loc	Holiday List By Date		Employment Details	
Emergency Contact List	_ Absence Analysis	_	Benefits List	
Leaver Analysis	Grievance Report		Management Report	
Leaver Summary	Disciplinary Report		Post Details	=
Gender Mix Report	Grievance Summary		Post Summary Details	
and the second second	 Disciplinary Summary 		Headcount Report	-
Ethnic Representation	V			



Certain reports will allow the user to amend the results to display. Select 'Show only' to choose required results.



Select Print or Export as desired. Export will render the report to Excel.

Simply Per	sonnel Demo		
Manageme			
Department: <-			
ocation: < <al< th=""><th></th><th></th><th></th></al<>			
Start Date: 10/0			
End Date: 09/0			
23 working da			
Starters Employee Name	and and		
Hofa, Tzajhat (45)	Alart Date Post 20/08/2015	Department L	ocation Salary 0.00
Total starters: 1			
Leavers			
Employee Name	Leaving Date Last Day	Department Location	Reason
otal leavers: 0			
Internal Moven	nents		
Employee: Previous Post:	Alboit, Albert (1) Administrator	Date of Change: New Post:	28/08/2015
Previous Post: Previous Department:	Administrator Management	New Post: New Department:	Human Resources Manager Management
revious Locetion:	London	New Locetion:	London
		Duration CPD H	loun
		Duration_ CPD + 0.00	60um 0.00
	de <u>Course Description</u> Totals:		0.00
Summary of Er Summary of Er Englowment Type Undefine Foll Time Tota: Gender Mix	de <u>Course Desoription</u> Totais: mployees Employed i Number 1 41	∞∞ in Period by Employn	0.00
Itat Date Course Co Summary of Er Implyment Type Indefinat UT The rotat: Gender Mix Number of Mates	de Course Description Totas: mployees Employed i Number 41 42	0.00 in Period by Employn Number of Females	∞∞ nentType
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Reports - Toolbar

Accessing Reports from the toolbar mirrors the same as accessing from the dashboard



- Select the Category of reports from the toolbar
- Select required report
- Export to MS Excel
- Or select Print



Simply Answers

A user is able to build their very own reports extracting the data from the fields they define.

This query building tool can be opened from the main Dashboard, toolbar and the Reports dashboard.

Employee Reports	^	Holidays and Absences	^	Pay and Benefits	^
Employee Details		Holiday Card Report	=	Pay Details Report	=
Internal Phone List		Holiday List By Employee		Job Details Report	
Phone List by Dept/Loc		Holiday List By Date		Employment Details	
Emergency Contact List	_	Absence Analysis	_	Benefits List	_
Analysis Reports Leaver Analysis		Disciplinary and Grievance Grievance Report		Management Reports Management Report	
Analysis Reports		Disciplinary and Grievance		Management Reports	^
		Grievance Report		Management Report	•
Leaver Analysis Leaver Summary		Grievance Report Disciplinary Report		Management Report Post Details	
		Grievance Report		Management Report	

Again the system will open a separate application.

Run Query New Quer Employee Recruitment Training Auditing	uery 👢 Load Query From DB 🤮 Print 🐧 Export To Excel 🖌 Chart 🖣 Load Query From Web 🔚 Save Query 🧩 Delete Existing Query Query Options -
	Simply Answers Quick, Easy access to your information
	SQL to be used for this query:
	·



Use the query builder from the middle dialog box selecting either;

- New Query to begin building
- Close to close the dialog box
- View queries available on the web to open already compiled reports

	Expand the employee section
	to begin selecting the fields
	to begin selecting the helds
🖽 Simply Answers	
File Query Help	
🛛 🔎 Run Query 📄 New Querj	y 🔍 Load Query From DB 🍪 Print 🔍 Export To Excel 嘴 Chart 💁 Load Query From Web 🔚 Save Query 🦼 Delete Existing Query 🛛 Query Options 🕶
Employee	
Absence Details	Drag a column header here to group by that column.
Absence Entitlement Det	
Appraisal Details Bank Details	
Benefit Details	
Contact Details	
CPD Details	
Disciplinary Details	
Documents	
Emergency Contact Det	
Grievance Details	
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Employee Holiday Years	
Employee Jobs	
Employee Notes	
Pay Details	
Employee Qualifications	
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Surname	
Firstname	
Middle Name(s)	
Title	
Date of Birth	
Status	
Gender	
National Insurance Num	
Number of Dependants	
Registered Disabled	
Nationality	SQL to be used for this query:
Ethnic Origin	
Religious Background	
Date of Employment	
Left Employment	
Last Day of Employment	
Reason For Leaving	
Leaving Notes -	
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- To include a field within ther report simply double click
- The system will place a green tick beside the field to highlight it is included within the report
- From the top toolbar run the query



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File Query Help									
🔎 Run Query 📄 New Quer	v 🔒 Load	Ouen/ From DB	Print 🤒 Export T	- Evcel M. Chart	I Load Query From Web		Delete Existing Query	Query Options -	
			Think Ca Export i			a save Query 🗶	belete existing query	Query options	
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Appraisal Details	▶ 1	Gail	Moser	Female					
Bank Details									
Benefit Details Contact Details	2	Jamie	Merritt	Male					
CPD Details	3	Marsha	McKay	Female					
Disciplinary Details	4	Kerry	Oh	Female					
Documents	5	Bryan	McLean	Male					
Emergency Contact Det	6	Jerome	York	Male					
Grievance Details Holidays Year Details	7	Dolores	Connolly	Female					
Employee Holiday Years	8	Sherry	Davis	Female					
Employee Jobs									
Employee Notes	9	Juanita	Reddy	Female					
Pay Details	10	Kim	Scarborough	Female					
Employee Qualifications Vehicle Details	11	Albert	Briggs	Male					
User Defined Details	12	Joanne	Thomson	Female					
User Defined List Details	16	Walter	Barrett	Male					
User Defined List Details	17	Bobby	Sullivan	Male					
User Defined List Details	18	Allison	Crabtree	Female					
Surname 🗸	-			1					
Middle Name(s)	19	Marguerite	Again	Female					
Title	20	Jane	Coble	Female					
Date of Birth	21	Alexandra	Short	Female					
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Number of Dependants	24	Kathy	Pratt	Female					
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Home Type	SELECT Em	ployee.Empid, Employee	Firstname as "Firstname	ie",Employee.sumame	as "Sumame", Employee.sex as "(Sender" FROM EMPLO	YEE		
Date of Employment									
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The system will compile the data in the centre of the screen.

The formula symbol will identify if average, maximum, sum etc. is requried

Simply Answers									
File Query Help									
		-	_			_	-		
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Middle Name(s)	19	Marguerite	Again	Female					
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Benefit Details Contact Details	2	Jamie	Merritt	(Blanks)				
Contact Details E CPD Details	3	Marsha	McKay	(NonBlanks) Female				
Disciplinary Details	4	Kerry	Oh	Male				
Documents	5	Bryan	McLean	Male				
Emergency Contact Det Grievance Details	6	Jerome	York	Male				
Holidays Year Details	7	Dolores	Connolly	Female				
Employee Holiday Years	8	Sherry	Davis	Female				
Employee Jobs Employee Notes	9	Juanita	Reddy	Female				
Pay Details	10	Kim	Scarborough	Female				
Employee Qualifications	11	Albert	Briggs	Male				
Vehicle Details User Defined Details	12	Joanne	Thomson	Female				
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User Defined List Details	-			Female				
Surname 🗸	18	Allison	Crabtree	1				
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Religious Background	SELECT Employ	ee.Empid, Employee.Fi	rstname as "Firstname	",Employee.sumame a	as "Sumame",Employee.sex as "Gender	" FROM EMPLOYEE		
Home Type Date of Employment								
Left Employment								
Last Day of Employment								
Reason For Leaving								
- Leaving Notes -								-
4 III >								

Use the funnel to filter the criteria on that column

Use the drawing pin to push the column to the front of the report.

-									
Simply Answers									
File Query Help									
🔎 Run Query 📄 New Que	ery 🔒 Load Querj	y From DB 🛛 🍪	Print 🔒 Export To	o Excel 🛚 💺 Chart	💁 🛛 Load Query From '	Veb 🛛 🔚 Save Query	/ 🦼 Delete Existing Q	uery Query Options •	
Employee									
Absence Details		~	group by that column						
Absence Entitlement Det Appraisal Details	Firstname Σ	⊽₽ Empid Σ	⊽ IP Surname Σ マ	+⊐ Gender Σ⊽+					
Bank Details	▶ Gail	1	Moser	Female					
Benefit Details	Jamie	2	Merritt	Male					
Contact Details	Marsha	3	McKay	Female					
CPD Details Disciplinary Details	Kerry	4	Oh	Female					
Disciplinary Details Documents	Bryan	5	McLean	Male					
Emergency Contact Det		6	York	Male					
Grievance Details	Jerome								
Holidays Year Details	Dolores	7	Connolly	Female					
Employee Holiday Years Employee Jobs	Sherry	8	Davis	Female					
Employee Notes	Juanita	9	Reddy	Female					
Pay Details	Kim	10	Scarborough	Female					
Employee Qualifications	Albert	11	Briggs	Male					
Vehicle Details User Defined Details	Joanne	12	Thomson	Female					
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User Defined List Details	-								
Surname 🗸	Allison	18	Crabtree	Female					
Middle Name(s)	Marguerite	19	Again	Female					
Title	Jane	20	Coble	Female					
Date of Birth	Alexandra	21	Short	Female					
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Number of Dependants	Kathy	24	Pratt	Female					
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Date of Employment									
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Last Day of Employment Reason For Leaving									
Leaving Notes									

Drag the column headers to group by the specific header.



SIMPLY ANSWERS - TOOLBAR



SAVING QUERIES

Users can save queries and then access them again from 'load query from DB' to extract the latest data at that time.

Jotalia	neader here to group by that co	lumn.	🖽 Save Query
Entitlement Det Firstname Σ s	⊽‡ Empid Σ⊽≠ Surname	Σ⊽+⊐ Gender Σ⊽+⊐	Query Name: Gender Report Save
Jamie	2 Merritt	Male	
etails Marsha	3 McKay	Female	Description: Cancel
etails 🗉 Kerry	4 Oh	Female	
ry Details Bryan	5 McLean	Male	
ls Jerome	6 York	Male	
y Contact Det Dolores	7 Connolly	Female	Save Column Filters
Year Details	8 Davis	Female	Schedule Dashboard
Holiday Years Juanita	9 Reddy	Female	Schedule Query
Jobs Notes	10 Scarborou	jh Female	
s Albert	11 Briggs	Male	Time: 16:00 - hrs
Qualifications Joanne	12 Thomson	Female	
etails Walter	16 Barrett	Male	Mon Tue Wed Thu Fri Sat Sun
ed List Details Bobby	17 Sullivan	Male	First Day of Month Last Day of Month
ed List Details Allison	18 Crabtree	Female	Specific Day of the Month:
Marguerite	19 Again	Female	
Jane	20 Coble	Female	Email:
me(s) Alexandra	21 Short	Female	From:
th Alicia	22 Sumner	Female	To:
Josephine	23 Moon	Female	Subject
Kathy	24 Pratt	Female	Messace:
f Dependants Megan	25 Mills	Female	Processing of the second s
d Disabled	00 101		
SQL to be used to	for this query:		

- Select Save Query
- Name the report
- Select 'Load query from DB' when requiring to run the report again

🖽 Simply Answers File Query Help					- # S	3
	🔒 Load Q	uery From DB 🔌 Print 🔍 Export To	Excel 噛 Chart 💁 Load Query From Web	🔚 Save Query 📌 Delete Existing Query	Query Options -	
	Drag a colur	🖽 Load Query				
⊕ Appraisal Details ⊕ Bank Details	Firstname Jamie	Gender Report	ОК			^
Benefit Details Contact Details CPD Details	Marsha Kerry		Cancel			=
Disciplinary Details Documents Emergency Contact Det	Bryan Jerome Dolores					
Grievance Details Grievance Details Grievance Details Grievance Details Grievance Holiday Years	Sherry					
Employee Jobs	Juanita	10 Coorderough	Esmala			



QUERY OPTIONS

Users may find by default Simply Answers excludes leavers, job and salary history. To include these within the report from the toolbar:

- Select required areas
- Run query

	/ 🔒 Load Que	ry From DB 👸 F	Print 🔒 Export To	o Excel 🖐 Chart	💁 Load Query From Web 🛛 🗧 Sa	ve Query 🗼 Delete Existing Query	Qu	ery Options -	
ployee Absence Details	Drag a column	header here to gro	oup by that column.					Include All Leavers	
Absence Entitlement Det			+⊐ Surname Σ⊽					Include Future Leavers	-
Appraisal Details	Jamie Z	2 2	Merritt	Male			~	Exclude Leavers	
Bank Details Benefit Details	Marsha	3	МсКау	Female			~	Use Inner Join	
Contact Details -		-							
CPD Details	Kerry	4	Oh	Female				Use Left Join	
Disciplinary Details	Bryan	5	McLean	Male			~	Show 'Reports To' Name	
Documents Emergency Contact Det	Jerome	6	York	Male				Show 'Reports To' ID	
Grievance Details	Dolores	7	Connolly	Female				Show Job History	
Holidays Year Details	Sherry	8	Davis	Female					
Employee Holiday Years	Juanita	9	Reddy	Female				Show Salary History	
Employee Jobs Employee Notes	Kim	10	Scarborough	Female					
Pay Details	Albert	11	Briggs	Male					
Employee Qualifications	Joanne	12	Thomson	Female					
Vehicle Details User Defined Details	Walter	16	Barrett	Male					
User Defined List Details	Bobby	17	Sullivan	Male					
User Defined List Details	Allison	18	Crabtree	Female					
User Defined List Details	Marguerite	19	Again	Female					
Surname 🗸 Firstname 🗸	Jane	20	Coble	Female					
Middle Name(s)									
Title	Alexandra	21	Short	Female					
Date of Birth Status	Alicia	22	Sumner	Female					
Gender 🖌	Josephine	23	Moon	Female					
National Insurance Num	Kathy	24	Pratt	Female					
Number of Dependants	Megan	25	Mills	Female					
Registered Disabled Nationality	- · · ·	1.00	l iz i	le i					
Ethnic Origin	SQL to be used	for this query:							
Religious Background Home Type Date of Employment Left Employment Last Day of Employment Reason For Leaving Leaving Notes	SELECT Employe	e.Empid, Employee.	Firstname as "Firstnam	e",Employee.sumame	s "Sumame",Employee.sex as "Gender"	FROM EMPLOYEE			



SCHEDULING QUERIES

Users can use the Simply Answers reporting tool to also schedule queries for a certain day of the month, and send results to a specified email address.

🖽 Simply Answers					
File Query Help					
🔎 Run Query 📄 New Quer	ry 🔒 Load Quer	y From DB 🛛 👌 I	Print 🔒 Export To	o Excel 🛚 💺 Chart	: 💁 Load Query From Web 🛛 🗧 Save Query 📌 Delete Existing Query 🛛 Query Options 🕶
Employee	Description		oup by that column		
Absence Details Absence Entitlement Det					E Save Query
Appraisal Details		∇₽ Empid Σ⊽	7-¤ Surname Σ⊽		Query Name: Gender Breakdown Save
Bank Details	Jamie	2	Merritt	Male	
Benefit Details	Marsha	3	McKay	Female	Description: Cancel
Contact Details CPD Details	Kerry	4	Oh	Female	
Disciplinary Details	Bryan	5	McLean	Male	
Documents	Jerome	6	York	Male	
 Emergency Contact Det Grievance Details 	Dolores	7	Connolly	Female	Save Column Filters
Holidays Year Details	Sherry	8	Davis	Female	Schedule Dashboard
Employee Holiday Years	Juanita	9	Reddy	Female	Schedule Query
Employee Jobs Employee Notes	Kim	10	Scarborough	Female	
Pay Details	Albert	11	Briggs	Male	Time: 16:00 - <i>hrs</i>
Employee Qualifications Vehicle Details	Joanne	12	Thomson	Female	
User Defined Details	Walter	16	Barrett	Male	Mon Tue Ved Thu Fri Sat Sun
⊕-User Defined List Details	Bobby	17	Sullivan	Male	First Day of Month Last Day of Month
User Defined List Details User Defined List Details	Allison	18	Crabtree	Female	Specific Day of the Month:
-Surname 🗸	Marguerite	19	Again	Female	
Firstname 🖌	Jane	20	Coble	Female	Email:
Middle Name(s)	Alexandra	21	Short	Female	From:
Date of Birth	Alicia	22	Sumner	Female	To:
Status Gender J	Josephine	23	Moon	Female	Subject:
National Insurance Num	Kathy	24	Pratt	Female	Message;
-Number of Dependants	Megan	25	Mills	Female	
Registered Disabled		20	12.5	le i	
	SQL to be used	for this query:			
Religious Background	SELECT Employe	e.Empid, Employee.	Firstname as "Firstnam	ne",Employee.sumam	e as "Sumame
- Home Type Date of Employment					
Left Employment					
Last Day of Employment					
Reason For Leaving					
Leaving Notes					

- Select Save query
- Provide the report with a name
- Check the box to 'schedule the query'
- Select the day
- Enter the recipient email address
- Save



Simply Answers- Charts

This area of Simply Answers enables the creation of charts based on the results of queries.



Run the query and select Chart from the toolbar.





Users can also copy the chart image to the clipboard allowing them to paste into a document.



Types of charts available are;

Column Charts



Bar Charts











The 'Labels' will be the fields the user has selected as part of the query. The Values option allows the user to tell the chart which values to display on each section of the chart, such as the number of days for each absence reason. Select the required value and how the value should be calculated.



Workflow Processes

The Business Process section is used to modify existing processes and to develop processes in line with the Organisation's policies. This programme can be accessed via the Personnel System Setup tab accessed from the main dashboard, or by and clicking on the Business Processes tab from within an employee's record.

Company Work Employee Time & Training Recruitment	ANING RECRUTMENT BY CRT UPDATES DOCU Company System Screen Busines Security Documents Setup	MENTS HELP	•
	•	Dashboard	×
	Personnel System Setup		
	E Company Details		
	Business Rules		
	Workflow Processes		
	System Parameters		
	Screen Designer		
	Back		

The Simply Personnel process designer allows the user to specify the common processes so that they can be performed with a level of consistency and accuracy. Simply Personnel already includes common processes which can be used or modified, these are;

- New Starter
- Leaver
- Disciplinary
- Grievance



Processes are used within an employee's record to keep track of different tasks and stages.

After designing a process it is automatically made available on the Process' screen for every employee.

Users can start new processes from this screen or see information about existing processes that may be activated or archived.

	Processes Blank Page Blank Pa	ige	URGENT TASKS
	Processes - N	ew Starter (1 - Albert Abbott) – 🗆 🗙	
	📘 🛃 🖌 Task	Description	Absences
	Collect mandatory information	Information: Collect all the mandatory information, such as start date, notice period, entitlements	
Albert Abbott	See proof of ID	Information: See, copy and file proof of ID or right to work	
Human Resources Manager	Issue contract	Information: Issue contract of employment and	
Management London		disciplinary and grievance procedure	Holidays
Reports To:			
Catherine Bathley			
Personal			Click the charts for more
Work			information
			Employment Calculator
Attendance			Book Holiday
Training / Qualifications			Record Absence
Docs / Contracts			
Other			Attendance Record
			Holiday Card
	<u>L</u>		Save Cancel

When an existing process is modified within the process designer it will not change any active or archived processes against an employee, the changed process will only take affect the next time a process is started for an employee.

A process consists of a Lifecycle. A Lifecycle has one or more stages and each stage has one or more tasks. Each task in a stage must be completed before moving onto the next stage. There are different types of tasks that can be attached to a stage depending upon what needs to be accomplished.



BUILDING A WORK FLOW PROCESS

The Business Process section will open into a separate application.



- Select New Process to begin a new process
- Open Existing Processes will list those previously created



TASKS



Tickbox task prompts or asks a question and allows a check list to be entered.

To set the tasks properties double click on the task.

A user task has the following properties that can be set:

• Description this will be what appears within the tasks list

Common Rules Help		×
Description:	Tickbox	*
*Task Type: Key (For Ordering Your Task): Tooltip: User Data:	USERTASK Tickbox 0	*LINKTRUE/LINKFALSE
		OK Cancel Help



<u>RULES</u>

perties ommon Rules I	Help		
Wait Time Days: Max Repeats: Complete In Days:	Stores Notes Automatic 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0		
		ОК	Cancel Help

- *Stores notes* allows the person confirming the task to enter notes about the task which are then shown in the task list.
- *Complete In Days* allows users to specify how many days the task should be completed within, the task will automatically be flagged up on the task list screen with either a Green, Amber or Red traffic light as it nears the completion date.

<u>HELP</u>

mmon Rules Help		
		A
		~
Show in dialog on task list		
	OK Cano	el Help

The message entered here will show on the task list screen to aid the users performing the tasks.



EMAIL TASK

The Email task provides a convenient way of sending an email from within the tasks list. Once the previous task is complete MS Outlook will open a window containing pre-determined wording.



• Description is free text and should provide detail on what action the task will perform.

ommon Rules Email He	Email to IT	*	
*Task Type:	EMAILTASK	*LINKTRUE/LINKFALSE	-
Key (For Ordering Your Task):			
Tooltip:	Email		
User Data:	0		
		OK Cancel	Help

The Email tab is where the user creates the template using the merge fields identified for selection.

Address: CC: Subject:	Email Help	Email Fields: Select one the fields from the list, the control you wish to update and then click on the Insert button, or manually type the field where required.
Message:		[[Employee.DrivingLicenceExpires]] [[Employee.DrivingLicenceExpires]] [[Employee.EC1Nadress1]] [[Employee.EC1Nadress2]] [[Employee.EC1Nadress3]] [[Employee.EC1Nadress3]] [[Employee.EC1Nadress3]] [[Employee.EC1Nadress3]] [[Employee.EC1Nadress3]] [[Employee.EC1Nadress3]] [[Employee.EC1Nadress3]] [[Employee.EC1Nadress3]] [Employee.EC1Nadress3]] [Employee.EC1Telephone1]] [Employee.EC1Telephone2]] * Control: Message
		OK Cancel Help


DOCUMENT TASK



The Document task allows a user to specify a document to be mail merged or inserted as it will take the user to the Document tab of the employee record.

- Description describes the detail of the action
- Help messages to show on the task list screen to aid the person performing the task.
- Stores notes, allows the person confirming the task to enter notes about the person which are then shown in the task list.
- Complete In Days, allows a user to specify how many days the tasks should be completed within, the task will automatically be flagged up on the task list screen with either a Green, Amber or a Red traffic light the nearer it comes to completion date.

roperties Common Rules	Document	Help					×
Document:							
				OK	Cancel	Help	



WAIT TASK



A Wait task will allow the user to specify the amount of time they should wait for a specific event to take place.

It is not necessary to use a Wait task unless it is required for the process to go down two different routes based on the wait expiry occurring, it is suggested that the Complete in Days option is used on a User Task to achieve a wait that will trigger the traffic light system within Simply Personnel.

DECISION TASK



The Decision task will prompt the user for one of two answers based on the question a specific path is followed in the process.



An example of a process



To modify some of the properties right select the icon.

PROCESS DESCRIPTION

				
	D (1)			
	Properties			X
	· · ·			
·····				
·····	Process Schedule Details Com	mon Rules		
()	Process Schedule Details	nules		
Process				
MIDCESS · · · · · · · · · · · · · · · · · ·	Description	Test Process		
Description	Description:	Test Process		A
· · · · · · · · · · · · · · · · · · ·				
· · · · · · · · · · · · · · · · · · ·				
				
				· · · ·
	AT 1 T	DECOROTART	ALL NUCTOUS ALL NUCEAU OF	
	*Task Type:	PROCESSSTART	*LINKTRUE/LINKFALSE	
	Key (For Ordering Your Task):			
	ruby (non ordoning roan rubit).			
			-	
	Tooltip:	Process start		
	roomp.	FIDCESS SLOIL		
	User Data:	0		
	User Data:	0		
Tickbox				
1				
1				
1				
			OK	Cancel Help
			OK	Cancel Help



DECISION TASK



This will then prompt the user for an answer.

_	3
No	1
	<u> </u>
	No



Screen Designer

Simply Personnel contains a powerful feature called Screen Designer whereby a user can modify the design of employee tabs to include more fields.

There are 2 blanks tabs (labelled blank page) this can be used to store additional details specific to the businesses requirements.

There are also 3 list pages deactivated from view which can used to record and list historical/multiple information

- New fields can be added
- Existing fields that a user does not want can be hidden
- Existing fields can be renamed.
- Fields can have their background and text colours changed to highlight them
- This is where a user can tailor the system to the exact needs of the organisation

To use the Screen Designer select an employee's record, all fields designed will be present on all employee records.

To enter screen designing mode select Toggle Screen Designer to enter grid mode to begin designing.



A floating toolbar will appear at the top of the screen, these are the tools a user will utilise to design the page.





On the right hand side are function to align the fields created.





Details of tool functions

Edit control – This allows a user to type characters and numbers with the box. Most fields are edit control e.g. surname, forename.

Multiline Edit Control- This control allows a user to type characters and numbers on more than one line e.g. the type seen on the notes page.

Label Control- This allows a user to name a field on the screen, labels are used to describe other edit control boxes.

Combo Box Control - This will allows a user to select from a list of pre-defined entries, for example, the Nationality Field is a Combo Box Control.

Tick Box - This allows a user to add a box which to Tick if relevant. Radio Button - Adding several of these controls allows a user to select a value from multiple options, e.g. the male/female buttons.

Date Control - This type of control allows a user to add date field, which will bring up a calendar to select day, month & year.

Group Box - This is a simply a frame, which contains a label, and can be used to enhance the aesthetic look of the screen.

Align Left - Use this button to align the left hand side of two or more controls.

Align Right - Use this button to align the right hand side of two or more controls.

Align Top - Use this button to align the top edge of two or more controls.

Align Bottom - Use this button to align the bottom edge of two or more controls.

Make Same Width - Make the width of two or more controls the same.

Make Same Height - Make the height of two or more controls the same.

Make Same Size - Make both the height and width of two or more controls the same.

Toggle Grid - This will toggle the grid on and off when the Screen Designer is active. The grid cannot be seen when the Screen Designer is not active.



Inserting a Control onto a Tab

- To insert a new field select the tab the field will exist on
- Select toggle Screen Designer
- Select the control by left click and holding down
- Drag the control the where it will sit on the page
- Release

To move a control

- Left click
- Drag to new position

RESIZING A CONTROL

Select the control

To resize place over the pointers

	Employee Maintenanc	[關 Ax 國 V 이 🎬 🖺 타 끪 펶 喆	= I 🕀 III – 🗆 ×
	Processes Blank Page Blank Page		
			L URGENT TASKS
			Absences
	X		
	X		
Albert Abbott			
Human Resources Manager	Label		
Vanagement	นักการการการการการการการการการการการการการ		
.ondon			Holidays
Reports To:			
Catherine Bathley			
actientie bachiey			
ersonal			Click the charts for more
			information
Vork			Employment Calculator
ttendance			
			Book Holiday
raining / Qualifications			Record Absence
ocs / Contracts			Record Absence
Other			Attendance Record
Ther			Holiday Card
			Save Cancel

If there is a requirement for more than one control to make the same:

Select all the other controls to be resized (do this by holding down the Ctrl key and left clicking on them). The first control selected will be the one that the other controls will be resized to match. Now left click on the Make Same Width, Make Same Height or Make Same Size buttons on the toolbar and this will make them the same.



DELETING A CONTROL

To delete a control, select the control so that the handles appear and press the 'Delete' key on the keyboard. It is not possible to delete the existing controls that Simply Personnel have created.

EDIT CONTROL

- To edit a control left select so it is highlighted
- Right click

Tab Order:			
Save to Database Field:	✓ Visible	~	
	Background		
	Text		

Tab order- this determines the order in which controls are accessed when pressing the TAB key.



Database Field - This is the list of database fields available to store the entered data into. First select a database field otherwise the data entered will not be saved. It is possible to rename the database later, to make it easier to report on and to identify Databases already in use



Do not link the same database field to more than one control as this could result in the data in the first control getting replaced by the data within the second. Every control must have its own database field.



Visible - Clear this check box to make the field invisible.

Background Colour - Left click this button and select the colour required.

Text Colour - Left click this button and select the colour required for the text for the control.

Mask Tab (optional)

Mask:	×	
literal:		
Mask Character	Description	
0	Numeric (0-9)	
9	Numeric (0-9) or space (')	
#	Numeric (0-9) or space (' ') or ('+') or ('-')	=
L	Alpha (a-Z)	
?	Alpha (a-Z) or space (' ')	
A	Alpha numeric (0-9 and a-Z)	
а	Alpha numeric (0-9 and a-Z) or space (' ')	
8.	All print character only	~

Edit controls can has masks applied to prevent invalid values being entered.

Mask - This drop down box is where a user will either type the mask required, or select one of the predefined masks.

Literal - This drop down box is where the user can enter the literal characters / place holders that the user will see when they type in the masked control. As the user enters the mask in the first box they will see the literal characters / place holders appear in this box.



When the user adds a mask to an edit control, in order for the mask to be applied they will be required to exit the Screen Designer and close the window, e.g. Employee Maintenance screen, and reopen it.



Mask Character	Description
0	Numeric (0-9
9	Numeric (0-9) or space (' ')
#	Numeric (0-9) or space(' ') or ('+') or ('-')
L	Alpha (a-Z)
?	Alpha (a-Z) or space (' ')
A	Alpha numeric (0-9 and a-Z)
a	Alpha numeric (0-9 and a-Z) or space (' ')
&	All print character only
>	Forces character to be upper case (A-Z)
<	Forces characters to be lower case (a-z)
Н	Hex digit (0-9 and A-F)
X	Hex digit (0-9 and A-F) and space (' ')

Label Control

Right click to view Label control screen.

General Text Text: Label		
Text: Label		
	OK Cancel	Help
1.00		

- Complete the name within the text box
- Click OK



Drop-down box

- To create entries within the combo cox
- Left click
- Right click
- Select the combo tab

Enter the list it e.g. item 1~ite	tems that will appear in th m2~item3~	he list box. Separa	ate each item with a	\sim including the last	one,
Items:					
~					
					~
Sort	Click on the Sort but	1 1 A		inglandar.	
300	Click on the Soft but	ton to rearrange ti	ne list into alphabet	ical order.	

- Select ~ then type the first item followed by ~
- Repeat this ensuring a ~ is placed at the end of the last item



RENAMING THE DATABASE FIELD

To rename the database fields access Screen Designer via one of the following methods.



The following screen will appear.

ield	Name	A	Update
UserDefChar1]	User Def Char #1		
UserDefChar2]	User Def Char #2	=	
UserDefChar3]	User Def Char #3		
UserDefChar4]	User Def Char #4		
UserDefChar5]	User Def Char #5		List Screens
UserDefChar6]	User Def Char #6		List Screens
UserDefChar7]	User Def Char #7		
UserDefChar8]	User Def Char #8		
UserDefChar9]	User Def Char #9		
UserDefChar10]	User Def Char #10		
UserDefChar11]	User Def Char #11	-	Close

- Select the relevant screen and field
- Select update (double click)
- User will then have the option to rename the field to something more relevant





It is recommended that when a user adds a database field to a control box, the user makes a note of which field they have linked it to so that they are able to change the field name to something relevant to help with report creation.

USER DEFINED LISTS

Three Employee screens have been added to Employee Maintenance area, these screens allows users to create their own list/history screen similar to job history list. These screens first need to be enabled using the Screen Designer.

Company	Details		9	Screen Desigr	ner		— — ×
company	Details	Screen:	Employee		•		
Business		List	Screens	:	x	•	Update
	List Screens				#1 #2		
Workflo	Type:	Employee		•	#3		
System F	List 1:	Title:	List 1		#4 #5 #6		List Screens
	List 2:				#7 #8		
Screen D	In Use	Title:	List 2]	#9		
	List 3:	Title:	List 3		#10 #11	•	Close
		ОК	Cancel	Help			

- Select List Screens
- To enable click In Use
- Enter the title of the page
- Click OK



The next time an employee maintenance record is open the new screen will appear.

The Add, Update, Delete buttons work the same as the other list screens except the user will need to first create the displayed forms using the Screen Designer.

	Docesses Blank Page Blank Page List 1
	User Defined Char #1 User Defined Char #2 User Defined Char #3 User Absences
	There are no items to show. User Defined Char #3
Albert Abbott	
Human Resources Manager	
Management	Holidays
London	
Reports To:	
Catherine Bathley	
Personal	Click the charts for more information
Vork	Employment Calculator
ttendance	
raining / Qualifications	Book Holiday
Docs / Contracts	Record Absence
	Attendance Record
Other	Add Update Delete Holiday Card
	Save Cancel

- Switch on the toggle Screen Designer
- Click the designer button



To rename a blank page turn on toggle screen deisgner and right click to amend the name



	User Defined Char #1	User Defined Char #2	User Defined Char #3	Use Ab	sences
	· · · · · · · · · · · · · · · · · · ·	There are no items to	show.		
ert Abbott	· · · · · · · · · · · · · · · · · · ·				
man Resources Manager					
nagement					idays
don					iuays
orts To:					
herine Bathley					
sonal					k the charts for more
					ormation
rk					
endance					Employment Calculator
ning / Qualifications	4				Book Holiday
					Record Absence
es / Contracts	•				Attendance Record
er			De	signer	Holiday Card
					Save Cancel

A blank form will appear then design this as for a blank page.

	Enter Details	x
Accident Details		Save Cancel
Accident Type	•	
HS Executive Informed	•	
Date	☑ 09/09/2015 🗐 🗸	
Notes	•	
		



COLUMN HEADINGS

The column headings on the lists can be customised to show the data from the corresponding database tables. This will allow users to decide which fields they want to see when looking at the list screens, which is not only useful for the new dynamic list screens but also for the existing ones where they may want to see screen designed data or hide the default fields. With Toggle Screen Designer on left click on the list, then right click and select 'list details' tab:

USER DEFINED CHAR #1	USER DEFINED CHAR #2	USER DEFINED CHAR #3	USER D
	There are no items to	show.	
4	ш		•
Jser Defined Char #6			
Jser Defined Char #7			
Jser Defined Char #8			
User Defined Char #9			
Jser Defined Char #10			
User Defined Char #11			
User Defined Char #12			

Drag (left click and keep the finger down) the headings not required to the bottom part of the box and vice versa for the heading required.

Users can also rearrange size and order by left clicking (keep left button on mouse down) and dragging.

Once the columns headings have been set up, click on the OK button and exit the Screen Designer.



Please note that the date formats cannot be changed for stored dates.



If a user wishes to add a control over an existing control, the first control must be hidden. To do this

- highlight the control by selecting
- left click
- right click
- remove by unchecking the visible option

Text		
Tab Order: Save to Database Field:	↓ ↓ ✓ Visible	
The control is eith	ner a label or a system control and cannot be linked to a database field.	



Global Updates

In this section a user can utilise the updating of multiple employee records at the same time. This section is only accessibly from the toolbar.



Each of the global update functions will open a wizard to allow the user to select the employee records to update.



- Select the global update
- Select Next from the first wizard screen
- Highlight the employee records to update





Hold down the Ctrl key to select multiple employee records.

Select next to view the next page.



The next page will display a confirmation page of the employee records being updated



Select Next

The final screen will allow users to select the areas of the wizard being activated.



CREATE HOLIDAY YEARS

The final screen of the Create Holiday Years wizard will allow users to select the year being activated and apply the bank holiday profile set within the business rules.

Holiday Year Details:			Preview	
Holiday Profile:	Holiday Year 🔹			
Holiday Year:	2016 🔹			
Bank Holiday Profile:	England and Wales		1	
Start Date:	01/01/2016			
End Date:	31/12/2016		Before applying th	e change
	 Use Normal Entitlement 			ie change
	O Set Entitlement To 28		a preview of the	
	Entitlement in Hours		adjustment can be	
	Update existing holiday years with the new entitlement		displaying the reco	
			being updated and	
			areas being update	ed
Employees to be upda	ted: 42			
	ill allow you to see the changes that will be made before performine d or remove employees.	ng the update. Select the Finish b	outton to perform the update, or	
		< Back Finish	Cancel Help	

- To finish the wizard and apply the change select Finish
- An audit report will be opened to allow a view the changes made





CLOSE HOLIDAY YEAR

To close holiday years select the Close Holiday Year function.



The below screen will appear allowing the user to select the year that will be closed and specify a carry forward.

Holiday Profile:	Holiday Year 🔹	Close Year				
loliday Year:	2014 🔹	Close				
Start Date:	01/01/2014					
End Date:	31/12/2014					
arry Forward:						
All Duration	O Maximum of 0					
Open a new holiday year without closing the current one.						



HOLIDAY ALLOCATION

This wizard will allow a user to allocate holidays to multiple employees

HOME SYSTEM SETUP PERSONNEL TRAINING RECRUITMENT REPORTS UPDATES DOCUMENTS HELP
Total Total <th< th=""></th<>
Holiday Allocation - Page 4 of 4 X Holday Detail: X Sat Dea: X If Data X Duation Disporting: X Duation Disporting: X Bask Holday X Renner Colou::

- Navigate through the wizard as before
- The final page of the wizard allows a user to select the date range
- Select Finish



SALARY UPDATE



This section will allow a user to update multiple salaries.

	Salary Update - Pag	e 4 of 4			×
Pay Change: Effective Date: Old Pay:	09/09/2015			Preview	
Absolute Change To: Amount Change By: Percentage Change Of:	2000				
Employees to be updated: 42					



SALARY GRADE



This function will allow a user to update salary grades

alary Grade:	Point 1	Update
Pay:	£22,000.00	Close
Period:	Year	Close
Apply This Pay To All Employed All Employ	ployees On This Grade	
🧿 Change Grade Pay		
ay Change:		
Effective Date:	09/09/2015	
	09/09/2015 £0.00	
Effective Date:		



ABSENCES



This section will allow a user to apply an absence to multiple employees such as severe weather.

GENERAL UPDATES

•	8	Ē		i								٤
eate Holiday C Years	lose Holiday Year tolidays	Holiday Allocation	Salary Grades ary	Training Courses	Training Needs / Profiles Training	Training Tasks	Absences	General Updates		Periods	Job Details	Task List
									ll Update e various	ree		

Within this section a user can update multiple areas of an employee record

	General Updates - Page 4	l of 4		-	
Detafs: Normal Holday Entitlement Security Level Length of Service Profile Paynal Company Employee Notice Period Employee Notice Period Default Work Period Absence Entitlement Profile	28 0 • • • • • • • •			Pv	eview
Employees to be updated: 3					
The Preview button will allow y he Back button to add or remo	ou to see the changes that will be made before perfor ve employees.	ming the update. Selec	t the Finish button to	perform the upd	ate, or
		< Back	Finish	ancel	Help

- Check the box of the area for updating
- Select the change within the drop down list
- Select Finish



BENEFITS



Here a user can apply a benefit to multiple employees

Benefit:	Bonus			Preview
Start Date:	09/09/2015			
End Date:				
Number:	1			
Annual Value:	£0.00 GBP -			
Notes:				
			*	
			-	
Membership N Type: Enrolment Date Provider: Sroup Number Plan:	e:			
Employees to b	be updated: 5			

NOTES



This global update will allow a user to add a note against the selected employee records

Date:	09/09/2015				
Category:	Minutes Notes	•			
Notes:					
1					
Employage	to be updated: 5				
crigwyyees	iv ve upokeu. v				
			< Back	Finish Car	cel Help
			- Oden		1.000



NOTICE PERIODS



In this section a user can amend multiple employees' notice periods.

otice Period Details:					Preview
pdate them based on the employe	notice periods for the employees or if you want e's length of service. The employees must hav Work screen to use this second option.				
Set Notice Periods					
Employee Notice Period:	1 Month	•			
Employer Notice Period:	1 Month	•			
OUpdate Notice Periods Based o	n Length of Service				
mployees to be updated: 42					
		< Back	Finish	Cancel	Help



PROCESSES



Here the user can start a workflow process against multiple employee records.

Change of Bank	Details						
Disciplinary							
Grievance							
Leaver							
New Starter							
Employees to be updated:	3						
Employees to be updated.	. •						
							-
		~ 0	lack	Finish	Cancel	Help	



JOB DETAILS



Here a user can change multiple areas of an employee's job record for multiple employees.

	n blank or set to zero wi	prevent this option be	ing updated.				
Post:			•				
Manager:	No Manager Selecte	d	Set Clear				
Hierarchy:			Set Clear				
Hours per Week	: 0 Fu	I Time Hours: 0					
Update Options:							
	Create a new job rec						
	Opdate the current jo	b record					
Employees to be	updated: 4						
	updated: 4 ton will allow you to see	he changes that will b	e made before per	forming the update.			
		-					
The Preview but	ton will allow you to see	-					
The Preview but	ton will allow you to see	-			Finish	Cancel	Help



TASK LIST

0	8	Ξ.		9	1		1	-	\odot	1		Ģ	3	2			- 1
reate Holiday Years		Holiday	Salary Update	Salary		raining Needs / Profiles		Absences			Notes		rocesses		Task List		
	Holidays		Sala	iry		Training					Upda	tes					
															Task Lis	t	
																n entry to the task reral employees	list
															_		_

Here a task can be entered against multiple employee records.

Task:	Health & Safety Review			Prev	view
Actioned By:	ADMIN -				
Task Date:	09/09/2015				
Task Time:					
Idsk Time.					
Notes:					
Employees to be	updated: 42				
	·				
		< Back	Finish	Cancel	Help



Global Mail Merge and Email

This area very much like the global update wizards can be used to merge documents or emails against multiple employee records. The mail merge template must first exist within the business rules.



Navigate through the wizard as before selecting the group of employees the document will be merged with.



- Highlight the template that will be merged.
- Click Next



The user then has a number of print options and save options.



EMAILS

A user can send an email to multiple employees.



Navigate through the wizard to select the employees and select the email template or the user can create a new.

Ose Template	New Starter		Select		Preview
Create New Email	 Work Email Main Contact Email 	⊙ To ○ Cc ○ Bcc			
mail:		0			
ubject:					
lessage:					•
tachments:					Add Remove
mployees to be email	ed: 5				
	ill allow you to see the selecte n to send the email, or the Ba				



Help and About Simply Personnel

A user can search for online help and useful resources, also navigate to the Simply Personnel website to view up and coming developments.



Users can also contact the support team via email which will create a unique support ticket.



A support representative may wish to connect with a user to verify a query, this can be done via the remote assistance link which will navigate to <u>www.islonline.net</u> where the Support Engineer will provide a unique code.

	HOME	SYSTEM SETUP	PERSONNEL	TRAINING	RECRUITMENT	REPORTS	UPDATES	DOCUMENTS	HELP	8 #?
¢?	•	•	🖄 🔁	?						
	Resources	Simply Personnel Website	Email Remote Support Assistance	About Lice Det	ince tails					
	Sup	port	Support Tools	System Infor	mation					
				About						
					rogram on, version ind copyright					

A Support Engineer may wish to identify the build a user is on – this information can be found within the About Simply Personnel section

Simply Training Simply Recruitment	
The Simply HR Software Company Email: info@simplypersonnel.co.uk	
www.simplypersonnel.co.uk	
Simply Personnel Version 12.7 Database Version 12.7, Build 9602-280515-0743 For Microsoft Windows	
Access Database Location: C:\Program Files (x86)\Simply Personnel\\database\perdemo.mdb	
Simply Personnel 12.7	OK
ight © Croner Group Limited	



The Licence Details section is the license for the software and a list of the modules purchased.

Simp	ly Personnel Li	cence Details 🛛 🗶
Welcome!	- Licence Details: -	
Welcome to Simply Personnel.	Company Name:	Simply Personnel Demo
In order to use Simply Personnel you must enter the product licence	Expiry Date:	31 12 2999
details on the right.	Max Employees:	50
This information will have been provided to you by your software	Users:	1
supplier.		Simply Personnel
		Simply Training Expenses
Employees		Simply Recruitment 🛛 🔳 Time and Attendance
Used: 42		Self Service Rostering
Remaining: 8		🕝 On Support
	Support Expiry:	31/12/2999
	Licence Code:	XFSK B555 EQWS KBBH
		Simply Personnel
	Email: inl	fo@simplypersonnel.co.uk OK
	www	.simplypersonnel.co.uk Cancel



Logging out of Simply Personnel



There are two ways of logging out from Simply Personnel, the top right hand cross of the system which will prompt for confirmation.

By selecting the X in the top right corner of the software.

From the top left logo it is possible to customize the toolbar ribbon and items displayed on the toolbar.

Customize	×
Tool <u>b</u> ars Commands Quick Access Keyboar	d Options
Toolbars:	
Simply Personnel Ribbon	New
	Rename
	Delete
	Reset
	Close Help

👤 Admin 🕨		<u>R</u> ecent Records		
		1 Employee - 1 - Albert Abbott		
Dashboard	۲	2 Employee - 15 - Rodger Cooper		
Print	٠	3 Employee - 25 - Julie Ainsworth		
		<u>4</u> b		
Save Ctrl+S		5 Employee - 45 - Tzajhat Htrfa		
		6 Employee - 2 - JOE BLOGSS		
Cancel		7 Employee - 1 - Jo Bloggs		
		8 Course - 2 - ADVANCED DRIVE		
Screen Designer		9 Course - 1 - H&S		
		🔀 Options 🔀 Exit		

A user is also able to minimise the toolbar ribbon compeltely from the top down arrows.



s 📔 🍳 🕶 😸 🔝 🍥	Ŧ					Simply Personnel - Dashboard	
HOME SYSTEM SETUP		Customize Quick Access Toolbar	INT	REPORTS	UPDATES	DOCUMENTS HELP	
-	~	Dashboard					
	1 ~	Task List					
Jseful Simply Personnel	~	Employee Search					
	s 🗸	Holiday Year Planner					
Support	~	Course Diary					
	~	Simply Answers					
	~	Self Service					
		More Commands					
		Show Below the Ribbon					
		Minimize the Ribbon	1			Dashboard –	×
	-						



MY NOTES

