



Simply Personnel – Personnel Manager

Simply Personnel

Login

Username:

Password:

Change Password:

www.simplypersonnel.co.uk

Simply Personnel 12.8.0.1

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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

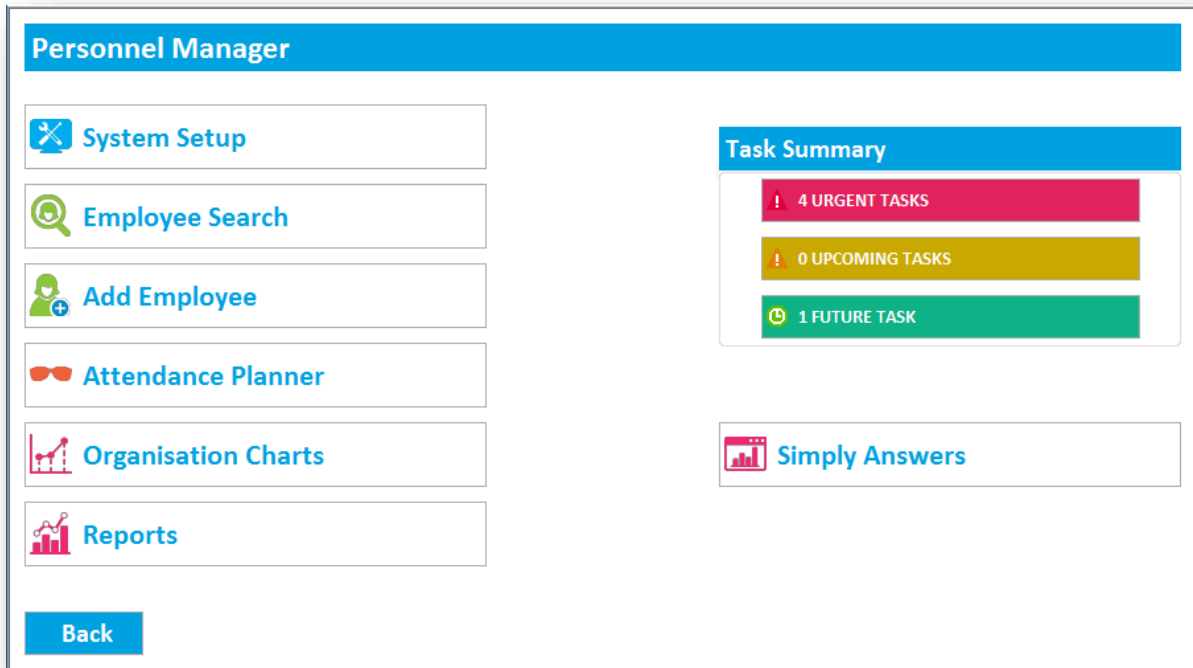
Contents

Introduction to Simply Personnel Manager	3
System Setup	4
Business Rules	5
Locations/Departments and Company Hierarchy	6
Holiday Setup	10
Absence Setup	15
Access Profiles and User Maintenance	20
Document Templates and Email Templates	25
Optional – Business Rules	31
Work Periods and Shift Plans	33
System Parameters	39
Toolbar-System Setup	42
Employee Search	45
Creating a New Employee	48
Employee Maintenance	49
Job History	55
Salary History	57
Maternity/Paternity Calculator	66
Documents and Contracts	73
Personnel Toolbar	81
Attendance Planner	82
Open Absence Conflicts	83
Task List	84
Organisation Chart	85
Reports	89
Reports – Toolbar	91
Simply Answers	92
Simply Answers- Charts	99
Workflow Processes	102
Screen Designer	112
Inserting a Control onto a Tab	115
Global Updates	126
Global Mail Merge and Email	140
Help and About Simply Personnel	143
Logging out of Simply Personnel	145

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

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.

The screenshot shows the 'Personnel System Setup' dialog box with the 'Address' tab selected. The 'Company Details' section contains the following information:

Company Name:	SP Demo
Telephone:	020 22 33 44
Fax Number:	020 22 33 45
E-Mail:	info@spdemo.co.uk
WWW:	www.spdemo.co.uk

The 'Web Links' section contains the following information:

Self Service:	http://localhost/simplywebpersonnel/
Timesheets:	
Time & Attendance:	
Online Recruitment:	

The 'OK' button is circled in red.

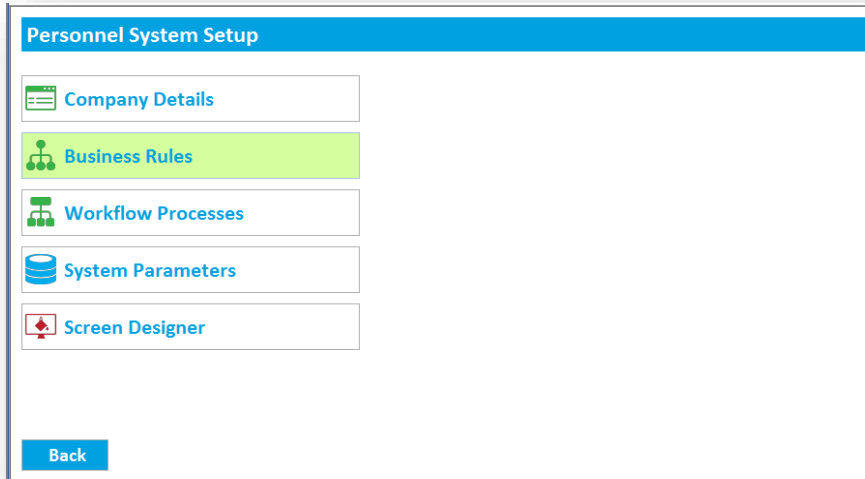
- Select Company Details
- Enter information on the main and address page
- Click *OK*

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

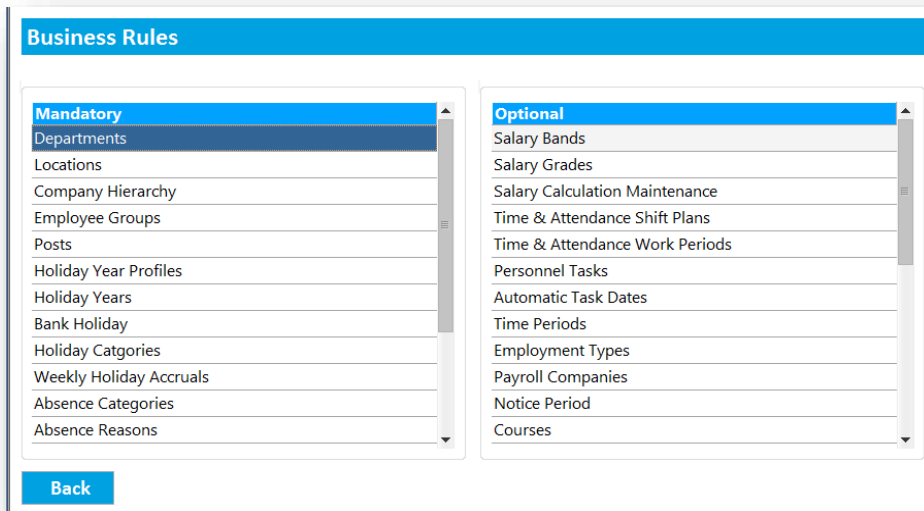
Business Rules

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.



- Select Business Rules



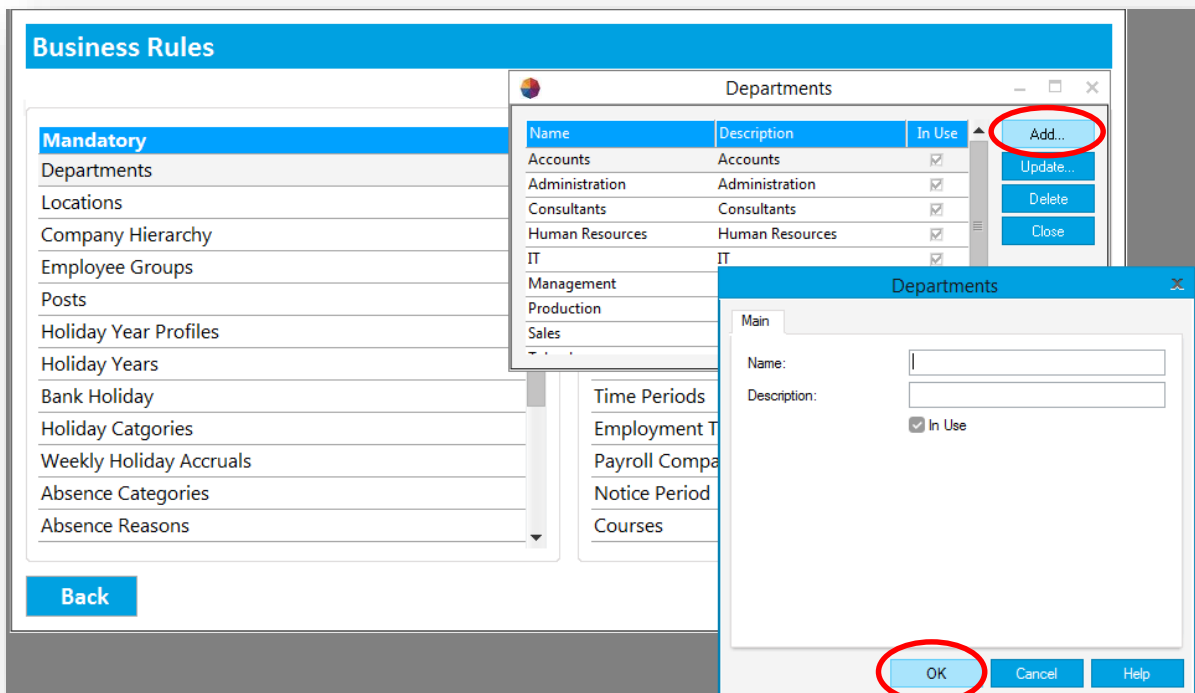
Locations/Departments and Company Hierarchy

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*



Repeat this for locations also.

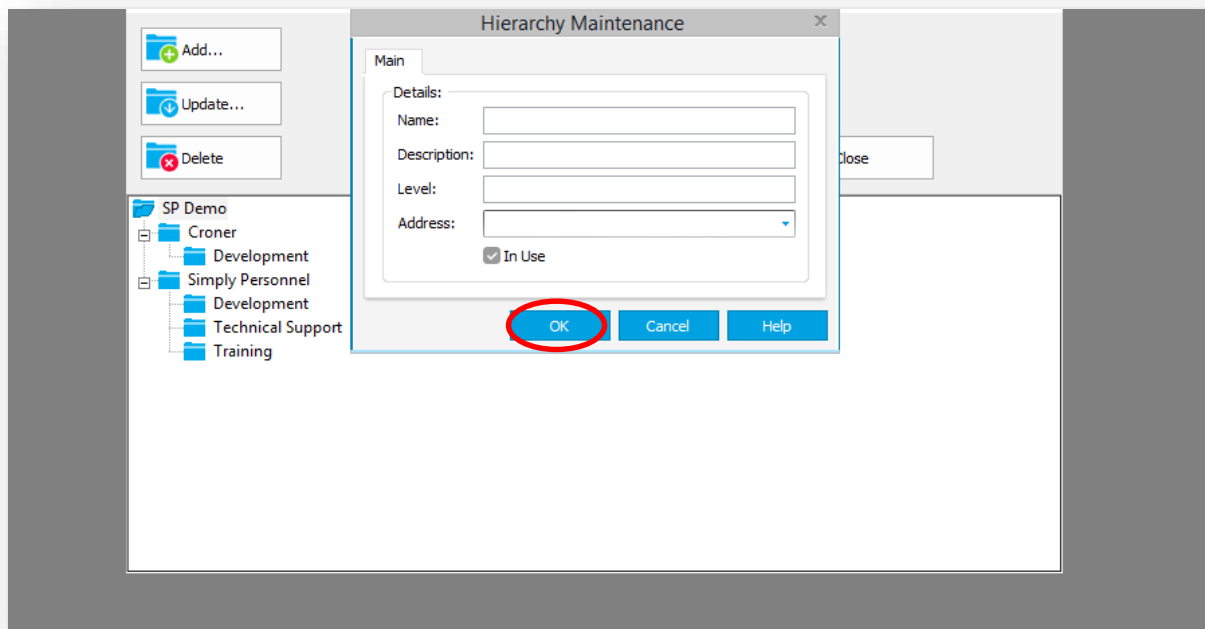
Update will allow an existing Department/Location to be amended.

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.



To add to an area highlight the section

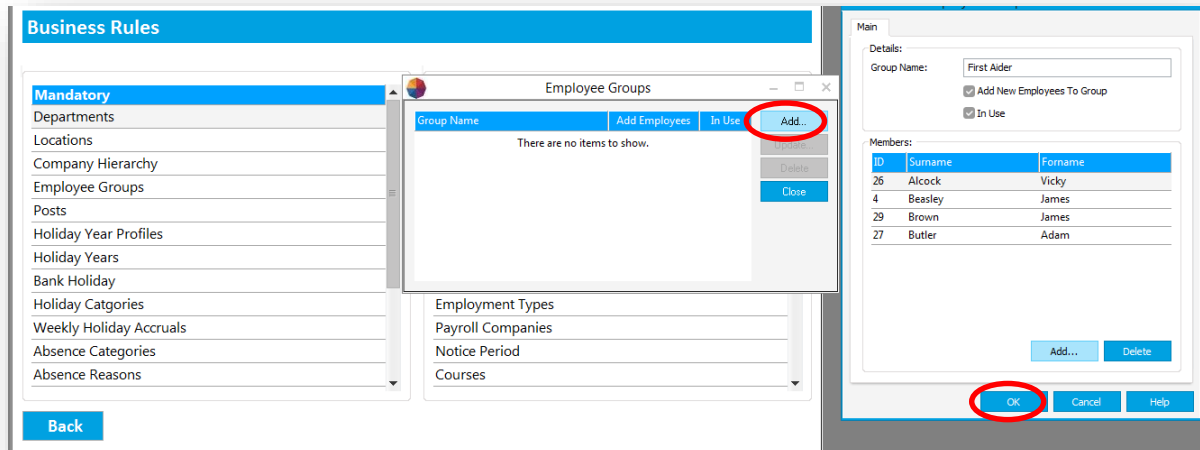
- Select *Add*
- Enter the name and description
- Addresses can also be linked these are created within the address section on the optional side of the Business Rules



Once built the hierarchy will need to be activated, this is completed within the system parameters [see [Company](#) under System Parameters for activation information].

EMPLOYEE GROUPS

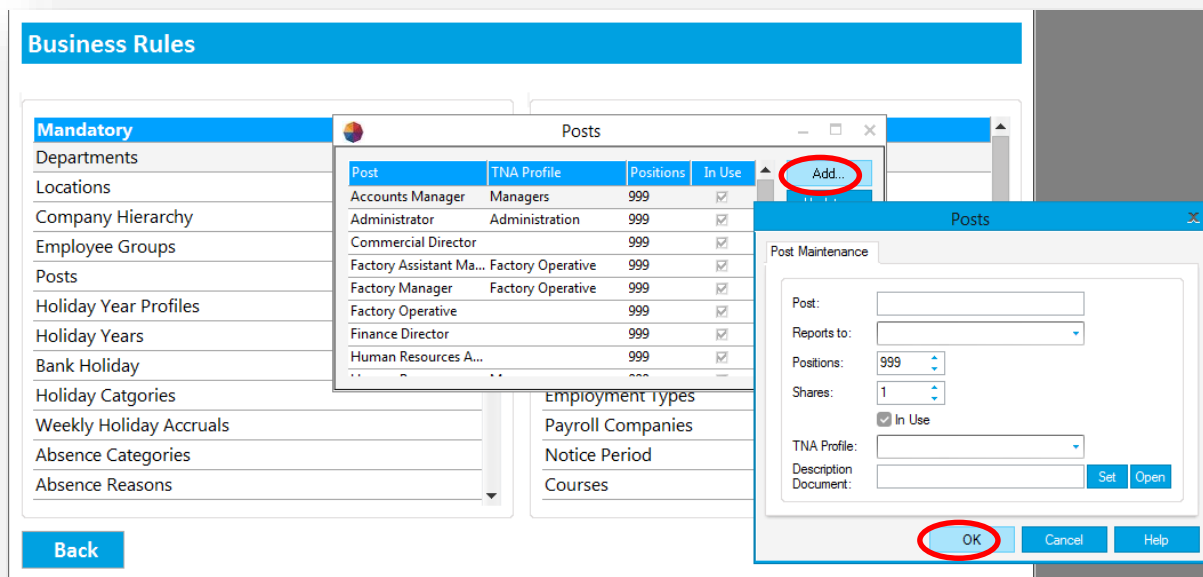
This is where a user is able to group employees together into specific groups i.e. managers, first aiders etc. and filter the Attendance Planner to view a group's holidays/absences.



- 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



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



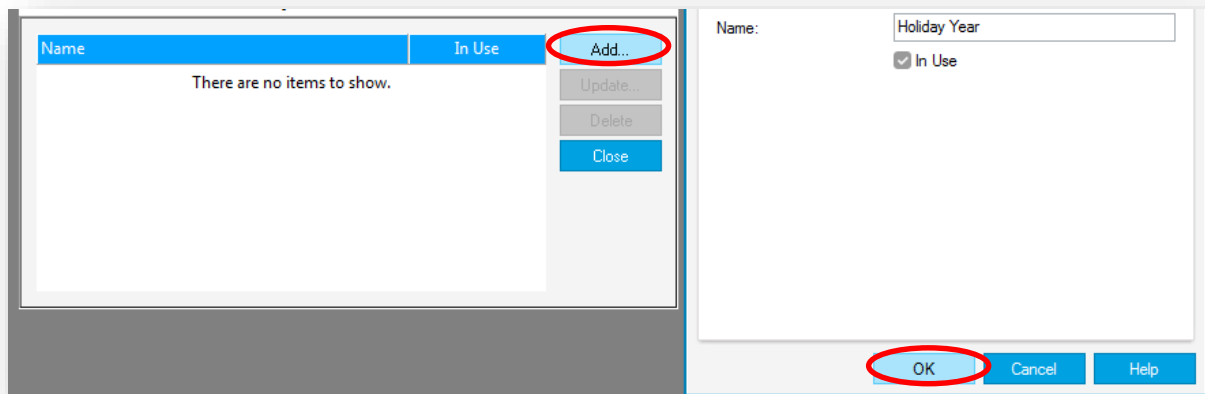
Users have the “in use” check box to again deactivate a job role yet retain the history.

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.



- 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	
Holiday Year	2014	01/01/2014	31/12/2014	Add...
Holiday Year	2015	01/01/2015	31/12/2015	Update...
				Delete
				Close

Holiday Year Details

Profile:

Year:

Start Date:

End Date:

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.

The screenshot shows the 'Bank Holiday Maintenance' application. On the left, a 'Business Rules' sidebar lists various categories, with 'Bank Holiday' selected. The main area displays a 'Bank Holiday' window for the 'England and Wales' profile. It contains a table of existing holidays:

Holiday Name	Start Date	End Date	Duration	Hours
New Years Day	01/01/2015	01/01/2015	0.00	0:00
Christmas Day	25/12/2015	25/12/2015	0.00	0:00

Below the table are input fields for 'Add' and 'Delete' buttons. A 'Holiday Details' dialog box is open, showing fields for 'Holiday Name', 'Start Date', 'End Date', 'Duration' (set to 0 days), and 'Colour' (set to yellow). The 'Add' button in the dialog is circled in red. The 'Update' button in the main window is also circled in red. At the bottom of the main window, the 'OK' button is circled in red.

- 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

The dialog box contains the following text:

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.

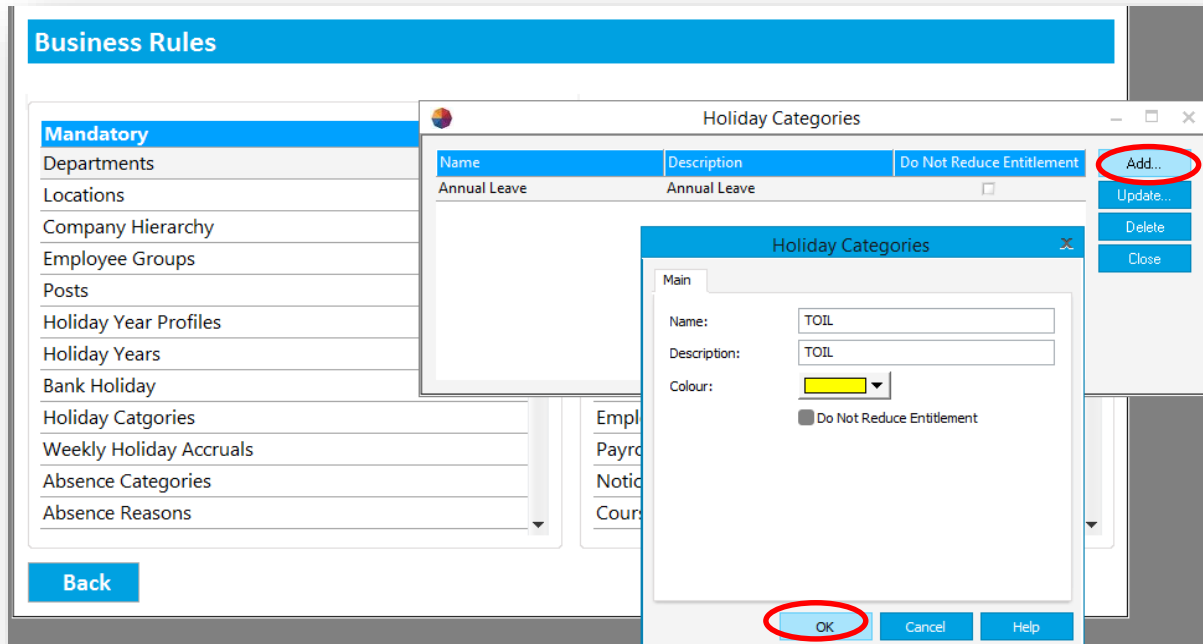
Buttons: Yes, No



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.



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

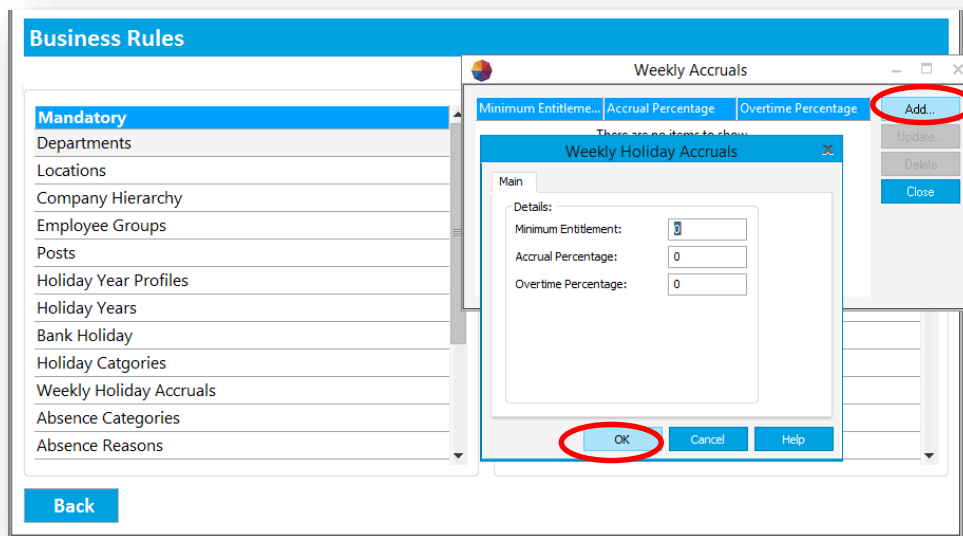


For users of Self Service element these categories will feed through to the online portal.

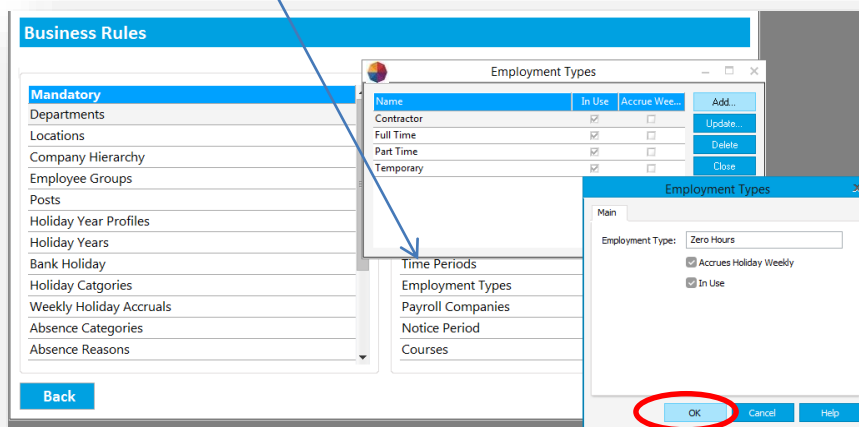
WEEKLY HOLIDAY ACCRUALS

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



Then complete the Employment Type setup

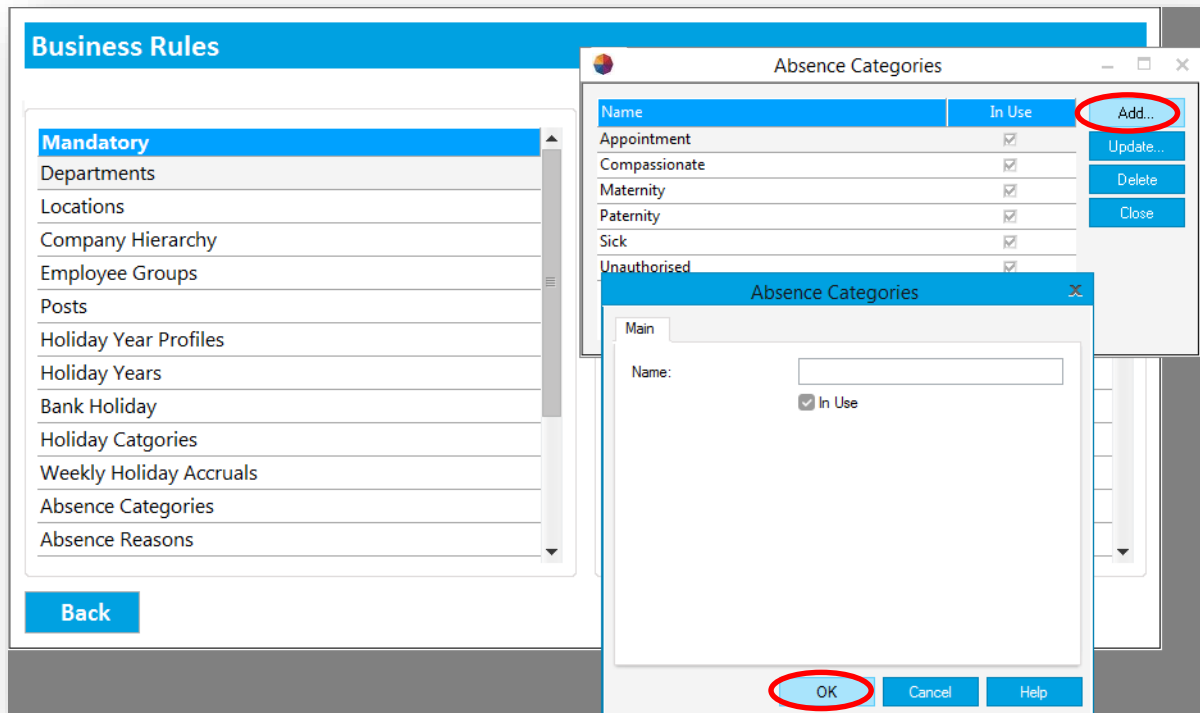


Absence Setup

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.



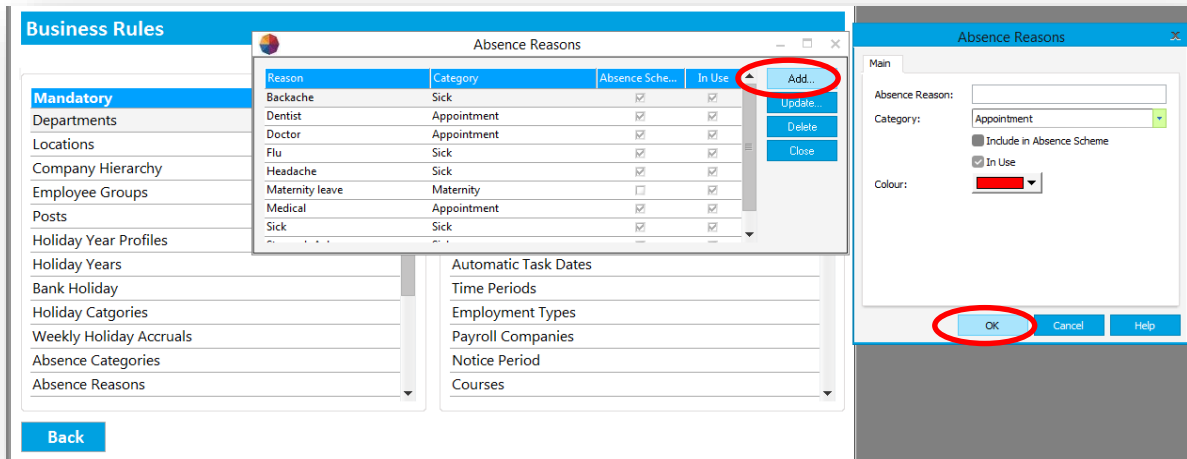
- Select *Add*
- Enter the category
- Press *OK*



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.



- 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.



Only one absence scheme can be active at one time.

The screenshot shows the 'Business Rules' interface. On the left, a list of 'Mandatory' rules is visible. In the center, the 'Absence Schemes' dialog box is open, displaying a table of schemes. The 'Update...' button for the 'Bradford Factor' scheme is circled in red. On the right, the 'Triggers' configuration panel is shown, with the 'OK' button circled in red.

Scheme Name	Scheme Type	In Use
Absence Count	Occurrence	<input type="checkbox"/>
Attendance Reward	Reward	<input type="checkbox"/>
Bradford Factor	Score Based	<input checked="" type="checkbox"/>

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

The screenshot shows the 'Absence Scheme' dialog box with the 'Triggers' tab selected. The 'Details' section contains a table with columns for 'Description', 'Lower Limit', and 'Upper Limit'. The 'Add...' button at the bottom is circled in red.

Description	Lower Limit	Upper Limit
Recommended Action - Term...	650.00	
Recommended Action - Final ...	400.00	649.99
Recommended Action - First ...	125.00	399.99
Recommended Action - Verb...	50.00	124.99

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

- 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.

Business Rules

Mandatory

- Departments
- Locations
- Company Hierarchy
- Employee Groups
- Posts
- Holiday Year Profiles
- Holiday Years
- Bank Holiday
- Holiday Categoriess
- Weekly Holiday Accruals
- Absence Categories
- Absence Reasons

Absence Entitlements

Profile Name	Available After (Mont...	In Use	Add...
Employee	3	<input checked="" type="checkbox"/>	Update...
Manager	3	<input checked="" type="checkbox"/>	Delete

Details:

Profile Name:

Available After (Months):

In Use

Date Settings:

Rolling Period: Months

Fixed Date:

Day:

Month:

Use Employee Start Date

Entitlements:

Absence Category	Waiting Duration	Full Rate	Reduced R...
Sick	2.00	3.00	10.00

Buttons: Add... Update... Delete

Bottom Buttons: OK Cancel Help

- 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*



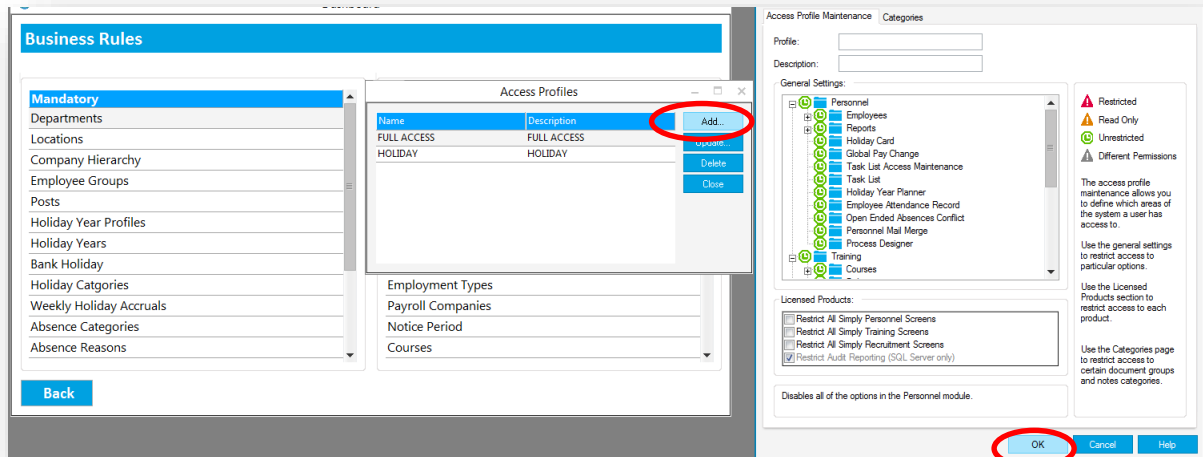
This will then be visible on each employee record using the above rule to calculate paid entitlement

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.



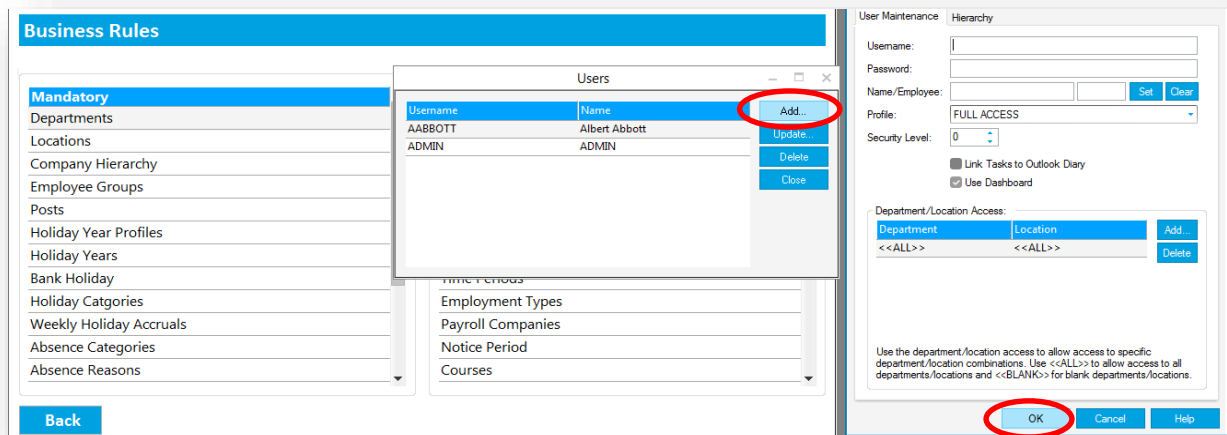
- Select *Add*
- Name the profile
- Select the dot on the areas to restrict that section, select it again to make it read only
- Click *OK*



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.



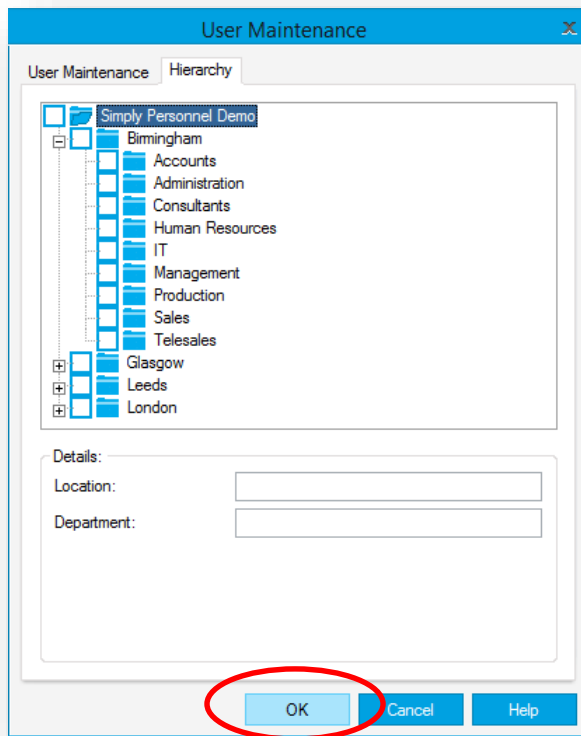
- Select *Add*
- Provide the username
- Set it against their employee record
- Set the access profile

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*

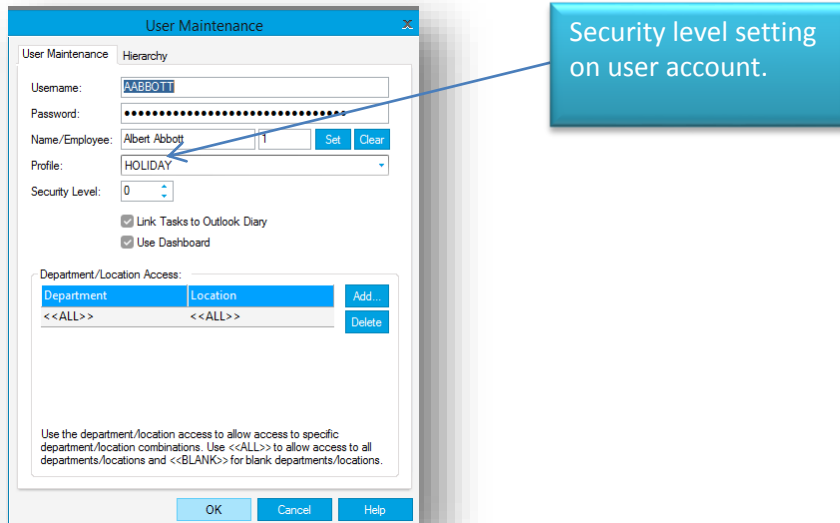


Each time a new section is added to the hierarchy, users will need to provide existing accounts access to the new section via System Setup>Security>User Maintenance.

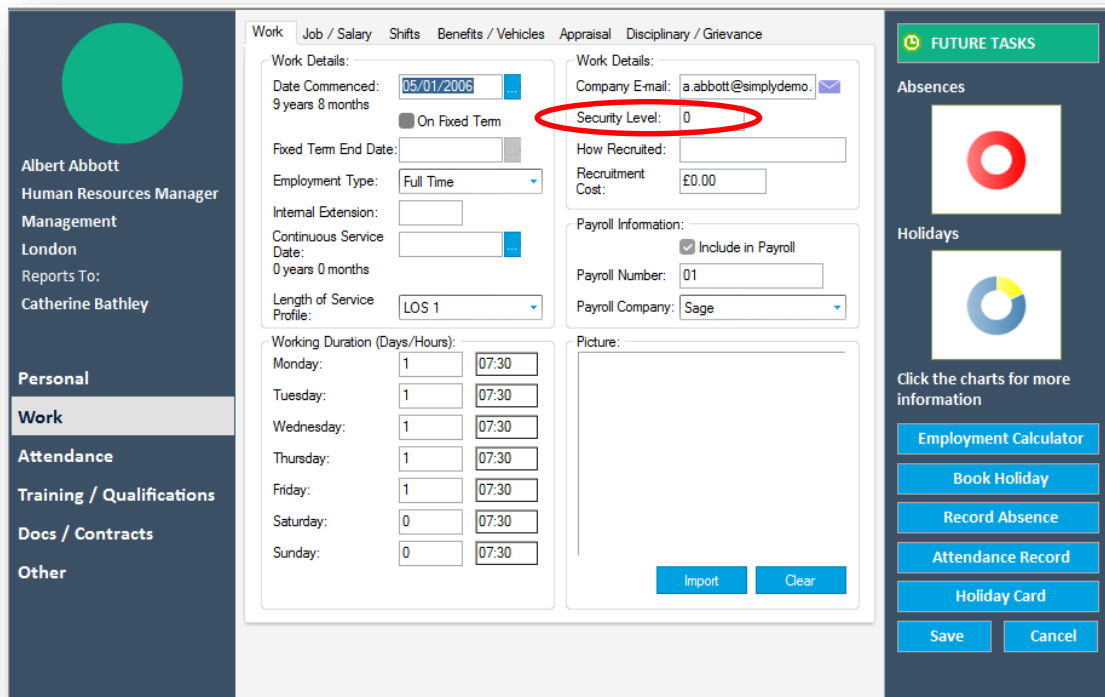
SECURITY LEVEL

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.

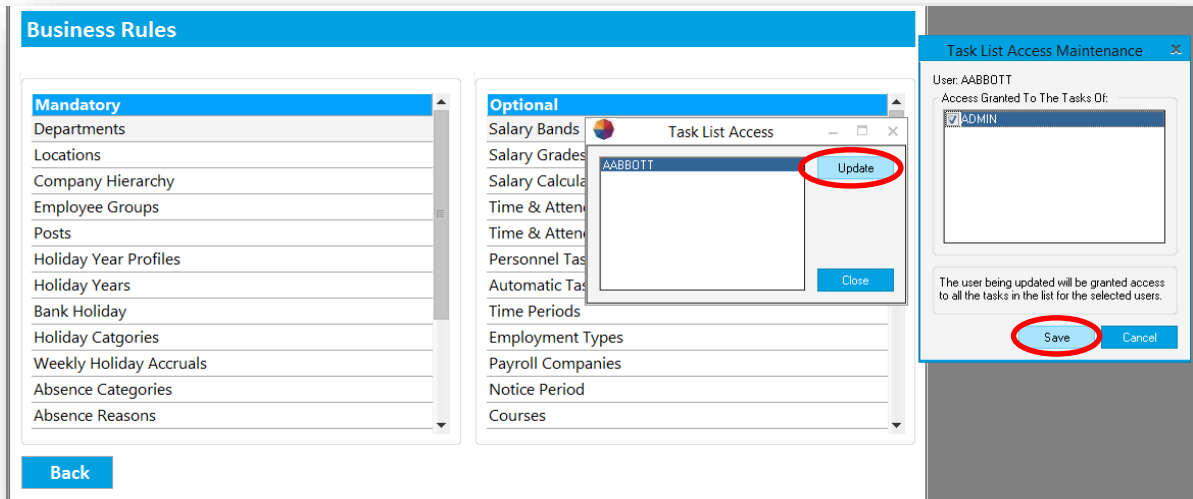


On the employee record:



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.



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

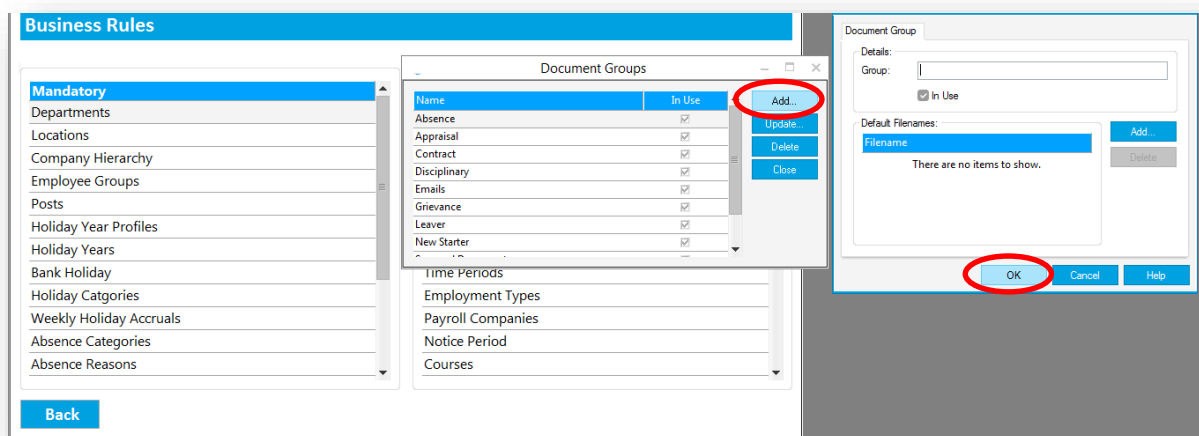
Document Templates and Email Templates

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 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.

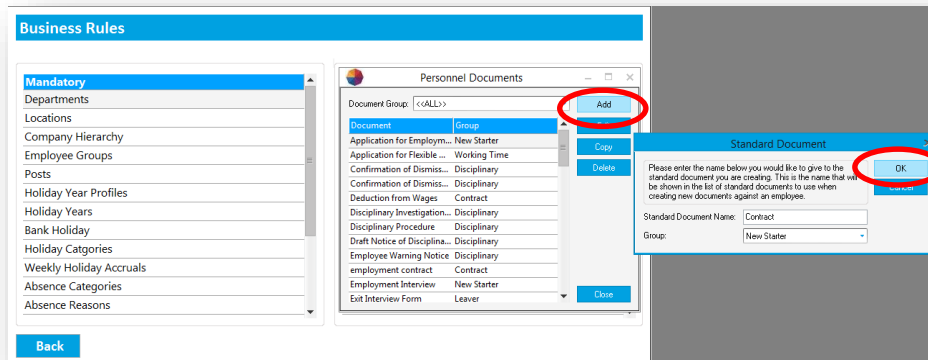
Within the document group users can then specify default file names.



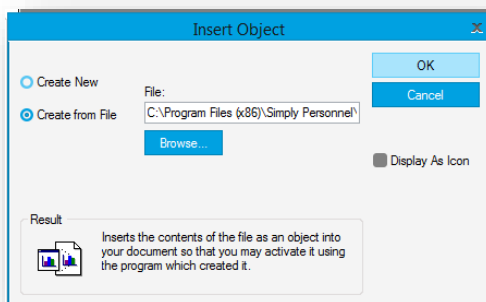
- Select *Document Groups*
- Click *Add*
- Enter the group name
- To add a default filename again select *Add* and enter the name
- Click *OK*

PERSONNEL DOCUMENTS

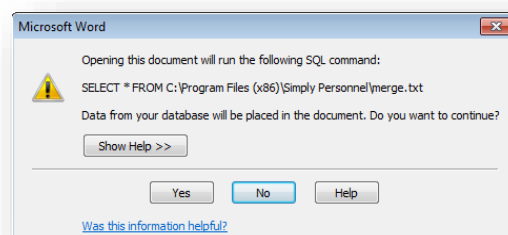
This section shows how a user can insert a template document which can then be merged with an employee's record to automatically insert the relevant data.



- 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.

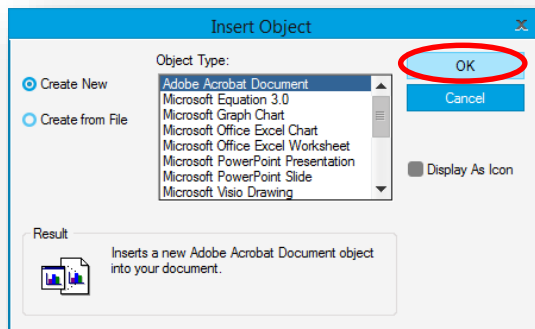


If a server busy message appears, this is due to a permission box waiting behind all open applications. Press ALT AND Tab on the keyboard to navigate to this area:

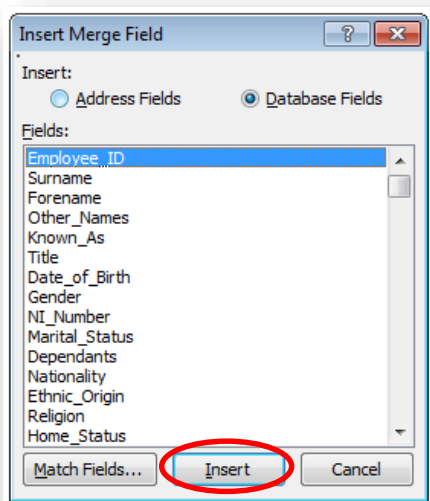


To create a new document

- 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.

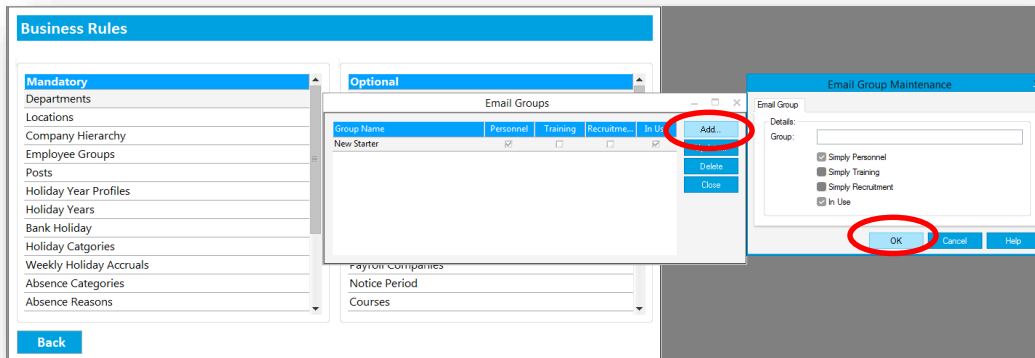


If an error message is displayed stating a text file is missing please follow the guidelines here :

<https://simplypersonnel.zendesk.com/entries/22993167-Personnel-Manager-This-file-could-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.



- 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.

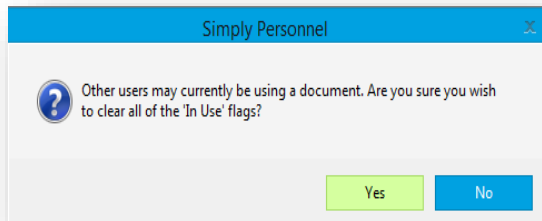
The screenshot displays the 'Email Template Maintenance' window. On the left, a sidebar lists various system components under 'Mandatory', including Departments, Locations, Company Hierarchy, Employee Groups, Posts, Holiday Year Profiles, Holiday Years, Bank Holiday, Holiday Categories, Weekly Holiday Accruals, Absence Categories, and Absence Reasons. A 'Back' button is located below this list. The main window has a 'Document Group' dropdown set to '<<ALL>' with an 'Add' button circled in red. The 'Template' tab is active, showing 'Template Details' with 'Template Name' and 'Email Group' (set to 'New Starter'). The 'Attachments' section is empty, with an 'Add...' button circled in red. The 'Email' section includes fields for 'From Address', 'To', 'CC', 'BCC', and 'Subject'. A 'Body' field is present with a 'Use HTML' checkbox checked and an 'HTML Editor' button. On the right, a list of merge fields is shown, including [[Applicant.Address1]], [[Applicant.Address2]], [[Applicant.Address3]], [[Applicant.Address4]], [[Applicant.Address5]], [[Applicant.Agency]], [[Applicant.ApplicantID]], [[Applicant.DateOfBirth]], [[Applicant.Disabled]], [[Applicant.EnquiryDate]], [[Applicant.EthnicOrigin]], [[Applicant.Event1Date]], [[Applicant.Event1Location]], [[Applicant.Event1Participants]], [[Applicant.Event1Time]], [[Applicant.Event1Type]], and [[Applicant.Event2Date]]. Below this list is a 'Control' dropdown set to 'Body' and an 'Insert' button. At the bottom right, the 'OK' button is circled in red, along with 'Cancel' and 'Help' buttons.

- 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*

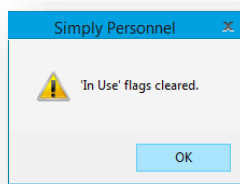
CLEAR LOCKED DOCUMENTS

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



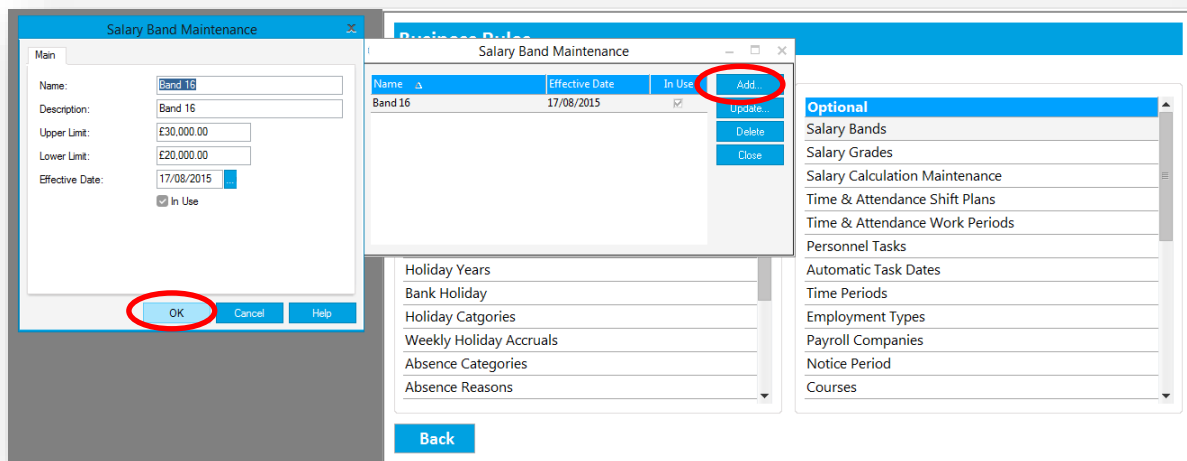
- Click *OK*

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

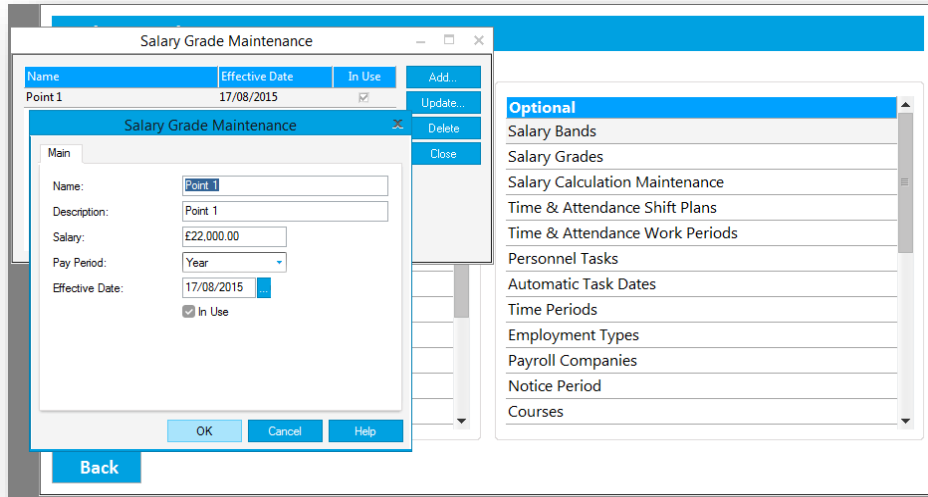
In this section users are able to set upper and lower limits for employees and apply them to the band via their salary record.



- 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.



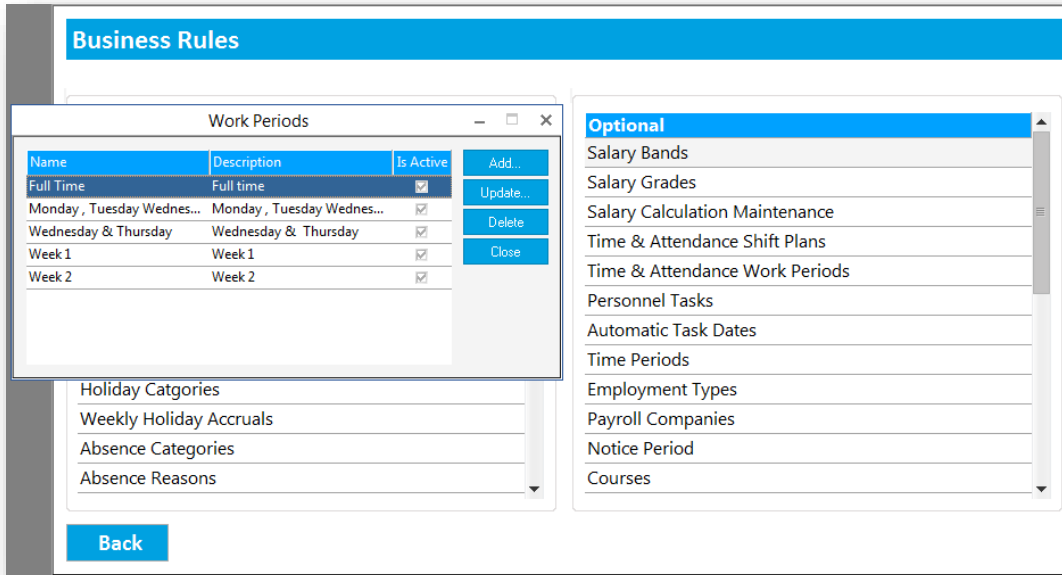
- Select *Add*
- Enter the name and description for the grade
- The pay period; monthly yearly hourly etc.
- Enter the effective date
- Click *OK*



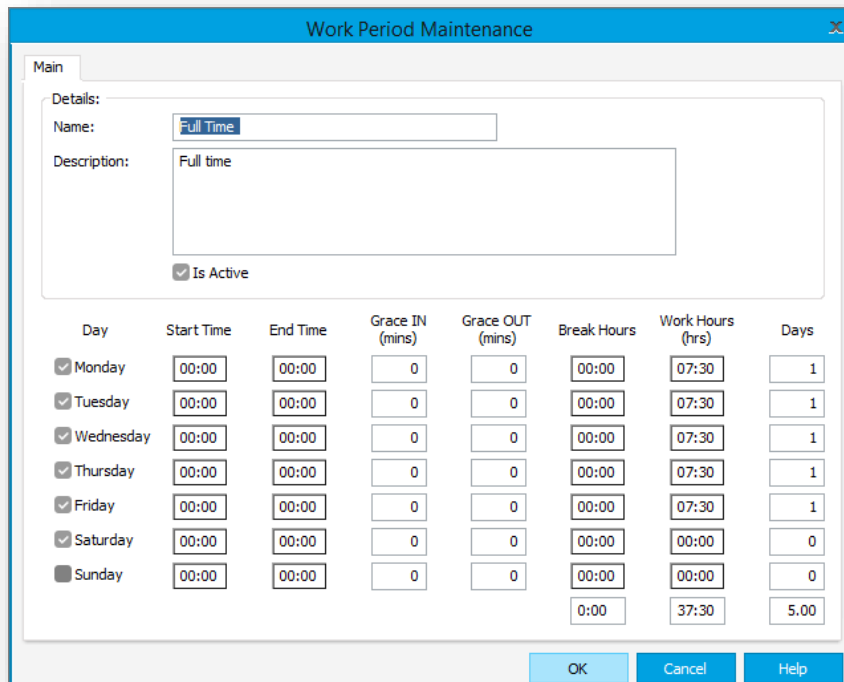
When applying a grade/band or both to an employee their salary must follow the rule if the salary does not fall into the specific grade the record will not save.

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.

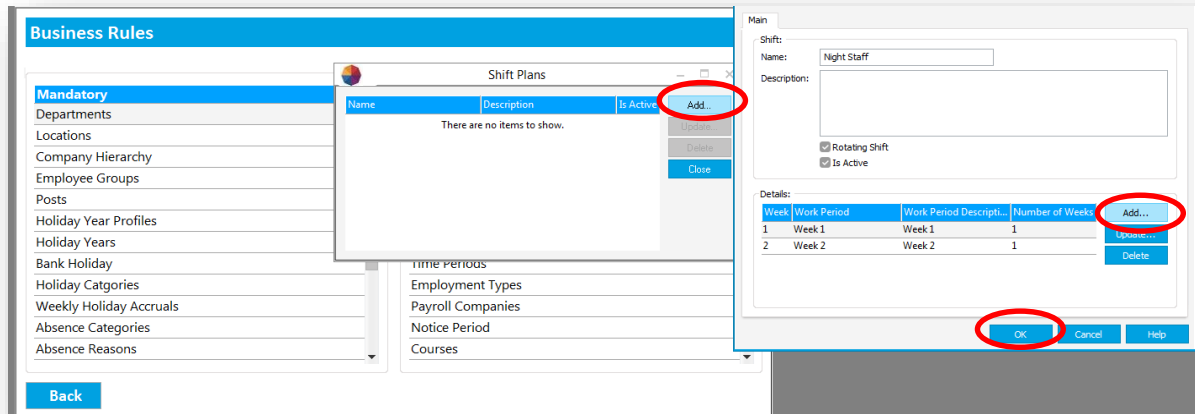


- Select *Work Periods*
- Select *Add* the next dialog box will appear to allow to specify the days and hours.



SHIFT PLAN

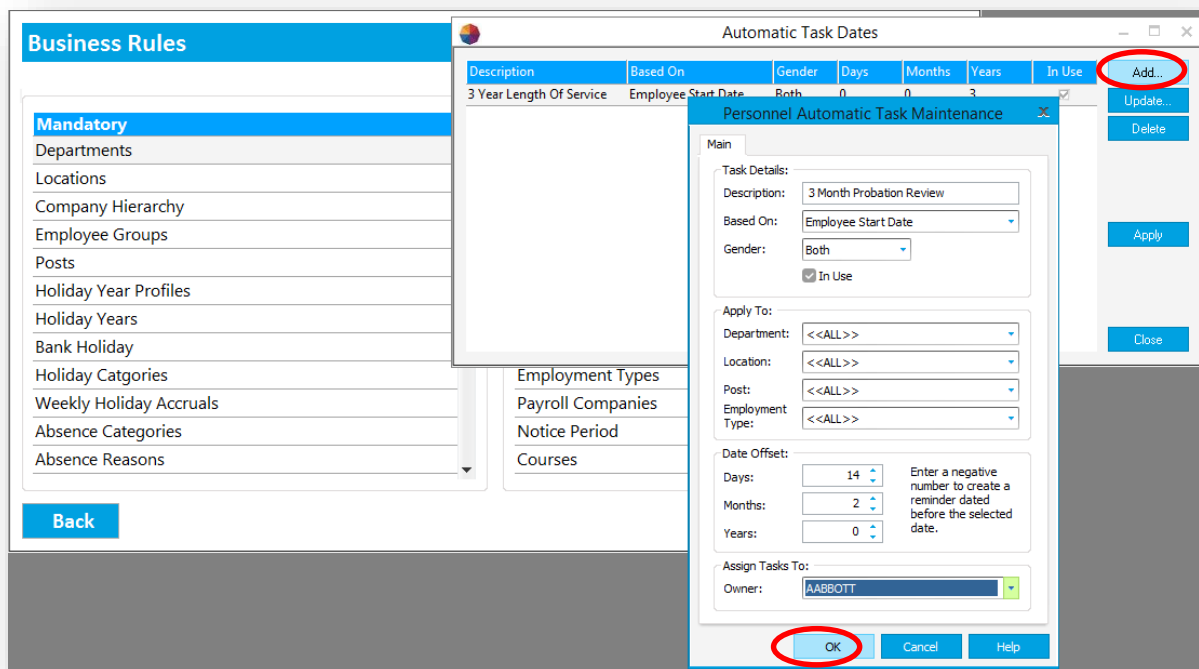
Using the shift plan section a user is able to set rotating shifts plans using the work period first to create the various working weeks, then linking them to a shift plan within this section.



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

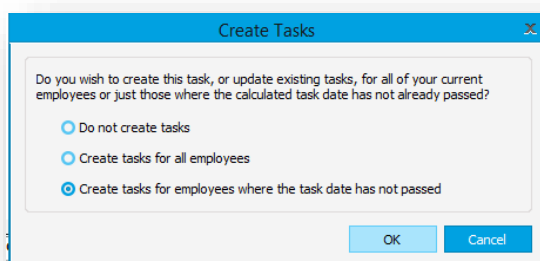
AUTOMATIC TASK DATES

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



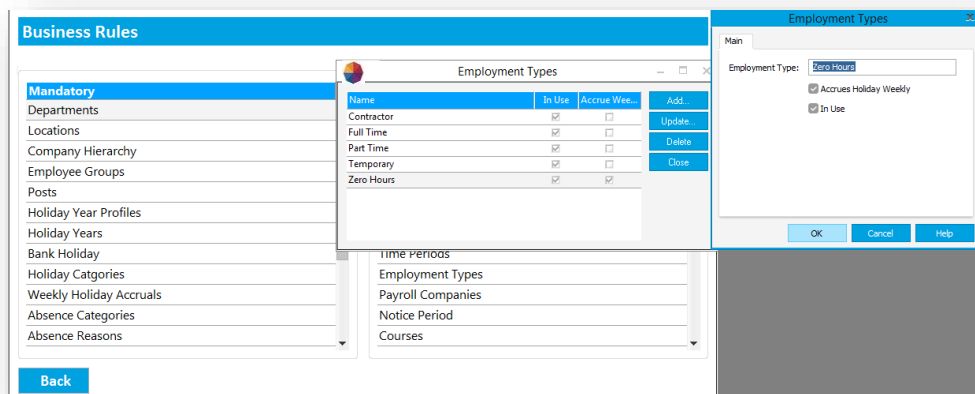
- Select *Add*
- Enter the description of the reminder and select the required date for basing the task on
- Specify criteria on which it will apply to i.e. Department/Location etc.
- Within the Date Offset enter the reminder period e.g. 3 months after employee's start date
- Assign the task to the relevant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

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



EMPLOYMENT TYPES

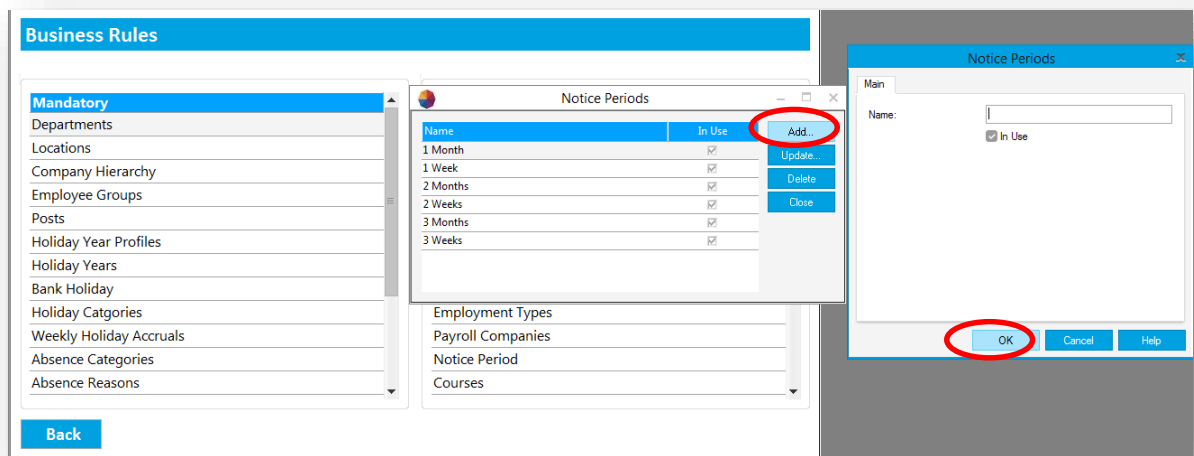
Here a user is able to create the necessary employment types.



- 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.



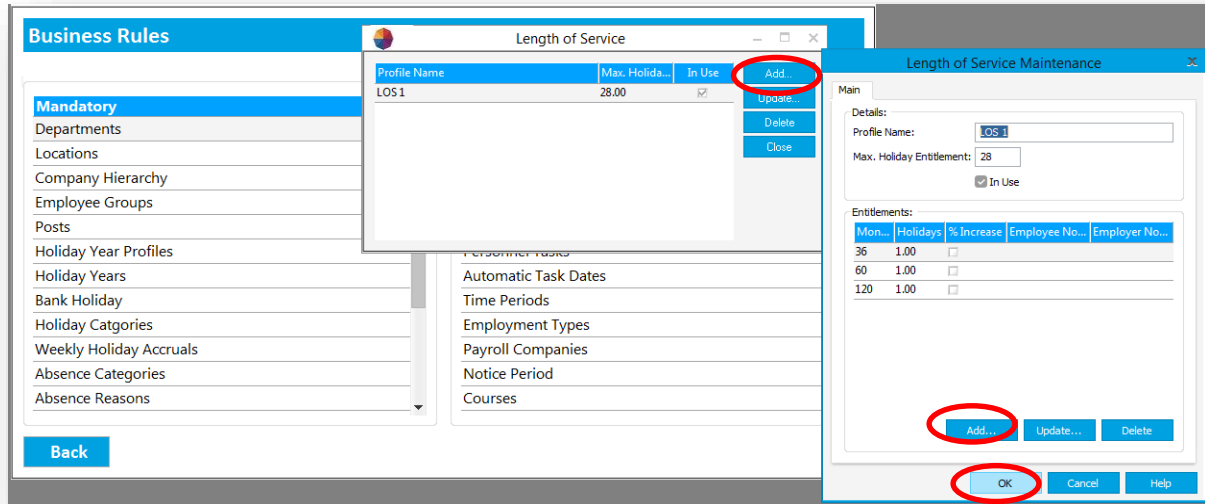
- Click *Add*
- Enter the description
- Click *OK*



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.



- 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

Personnel System Setup

System Parameters

Personnel | Holidays | Absences | Task List | Work Details | Training | Recruitment | Company | Email

Default Values:
Security Level:

Payroll Details:
 Set Payroll Number to Employee ID for New Employees

New Starter Procedure:
Process:

FTE Details:
 Use FTE Full Time Working Hours:

Sort Code:
 Use the format XX-XX-XX for the bank sort code

Salary Settings:
Overtime Rate: x Hourly Rate

Default Planner Options:
 Show Absences Show Courses

New Employee:
 Force Automatic Employee ID
 Department / Location / Hierarchy is Mandatory

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.

The screenshot shows the 'Personnel System Setup' dialog box with the 'System Parameters' tab selected. The 'Holidays' sub-tab is active. The 'Holiday Entitlement Calculation' section includes a checked 'Round Entitlement' option with radio buttons for 'To the nearest', 'Up to the next' (selected), and 'Down to the previous'. A dropdown menu shows '1/2' day. There is a checkbox for 'Use Working Duration to Calculate Entitlement' and a 'Weeks Holiday Per Year' field set to '5.6'. The 'Default Values' section has a 'Holiday Entitlement' field set to '28'. The 'Length of Service' section has an 'Add Extra Entitlement as:' dropdown set to 'Additional Entitlement'. The 'TOIL Settings' section has 'TOIL Expires' set to 'Never', with options for 'Days or Weeks' (set to '1') and 'Fixed Date' (set to '1' day and 'January' month). The 'Holiday Accrual' section has a checked 'Update Holiday Accruals after Logging In' option and a 'Default Monthly Accrual' field set to '0'. Navigation buttons 'Back', 'OK', 'Cancel', and 'Help' are visible.

COMPANY

Here is where the user can activate the hierarchy setup

The screenshot shows the 'Personnel System Setup' dialog box with the 'System Parameters' tab selected. The 'Company' sub-tab is active. The 'Hierarchy' section has a checked 'Use Hierarchy' option. Below it, 'Level 2' is selected as 'used for Department' and 'Level 1' is selected as 'used for Location'. There are five text input fields for 'Level 1 Description' through 'Level 5 Description', with 'Location' and 'Department' already entered. The 'Currency' section has a checked 'Use Currency Symbol' option and a 'Default Currency' dropdown set to 'GBP'. The 'Maintenance' section has three unchecked checkboxes: 'Close Maintenance Windows when Saved', 'Close Task List when it opens another window', and 'Close Search screens after opening records'. Navigation buttons 'OK', 'Cancel', and 'Help' are visible.

EMAIL

The screenshot shows the 'Personnel System Setup' dialog box with the 'System Parameters' tab selected. The 'Email' sub-tab is active, displaying the following configuration sections:

- Email Server Settings:** Server Name / IP Address (text field), Port (text field with value 25).
- Email Authentication:** Method (dropdown menu set to 'None'), Username (text field), Password (text field).
- Email Method:** A note states: 'Please select the method you want to use for sending general emails: Please note that the email templates will use the SMTP settings above and not this method.' Below this, 'Send Email using:' is a dropdown menu set to 'Outlook'. A sub-note reads: 'The Outlook option will link directly with Microsoft Outlook and the "Mail To" option will open the computer's default email program.'
- FTP Settings (Left):** FTP Server / IP Address (text field), Port (text field with value 0), Username (text field), Password (text field).
- FTP Settings (Right):** FTP Passive Mode, Vacancy Folder (text field), Applicant Folder (text field).

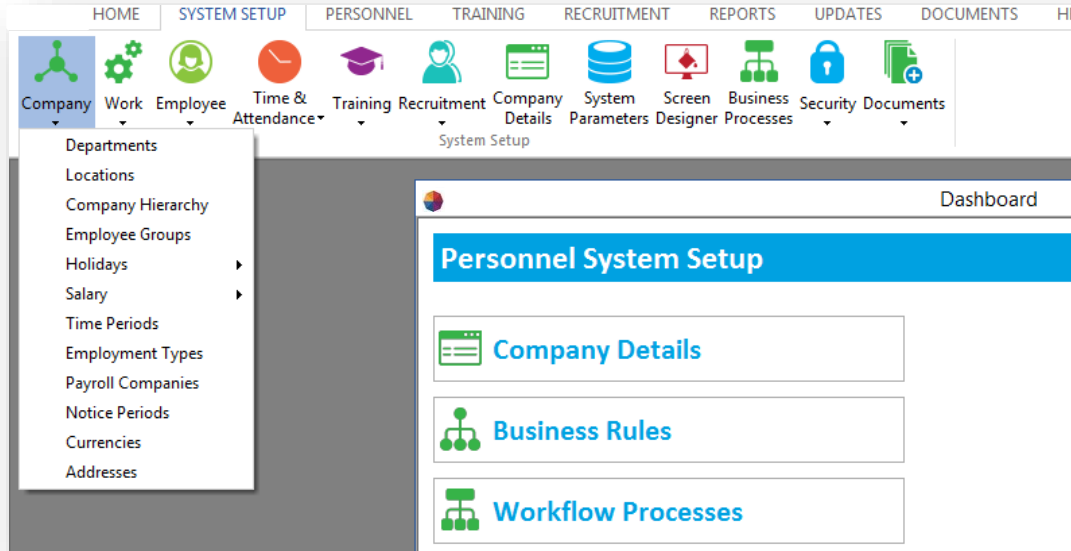
Buttons for 'OK', 'Cancel', and 'Help' are located at the bottom right of the dialog box. A 'Back' button is visible in the main application window behind the dialog.



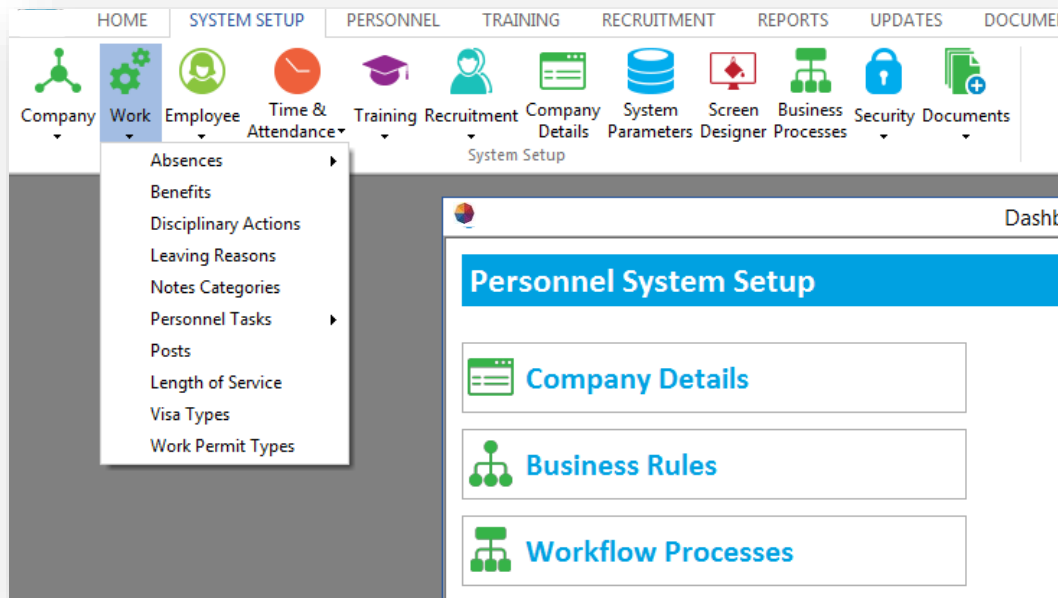
This section is important in order to send emails to employees.

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.

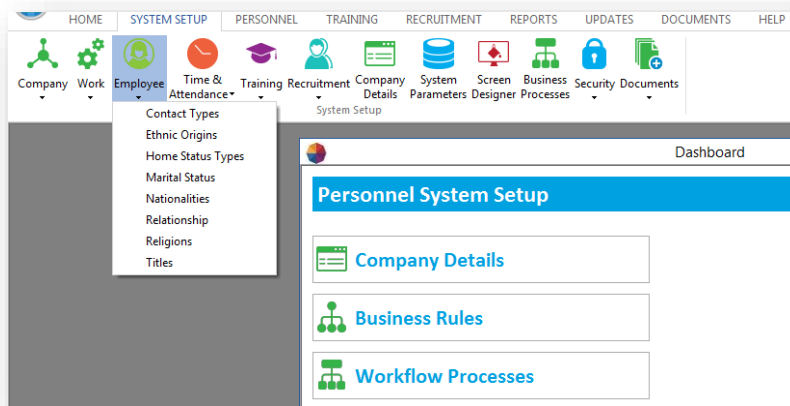


The company drop down menu will allow a user to populate the location, departments notice periods etc.

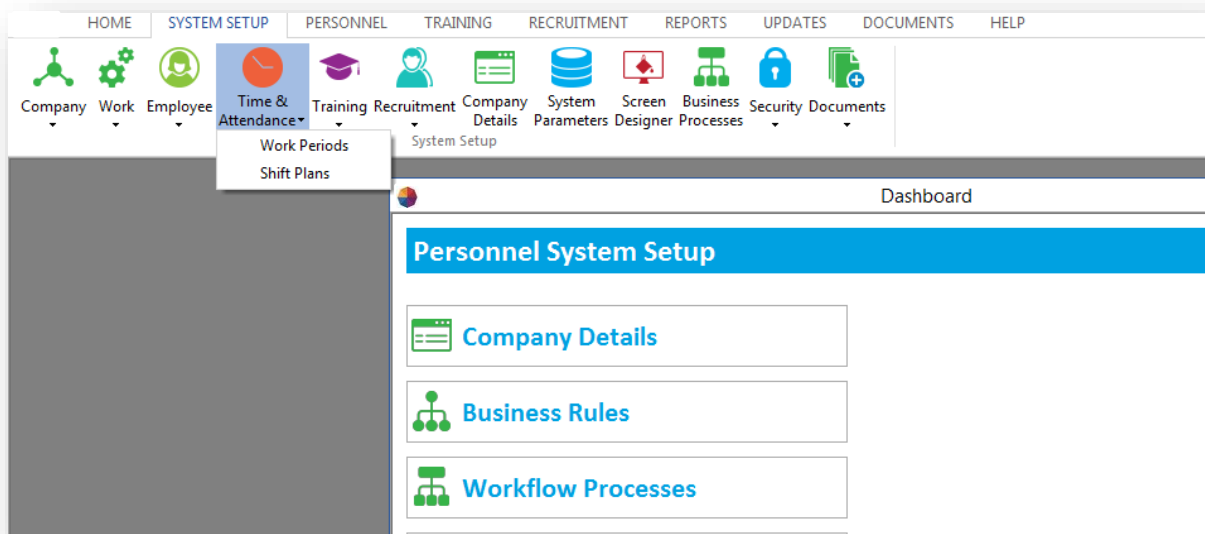


The work drop down menu will allow a user to populate absence configuration such as reasons etc.

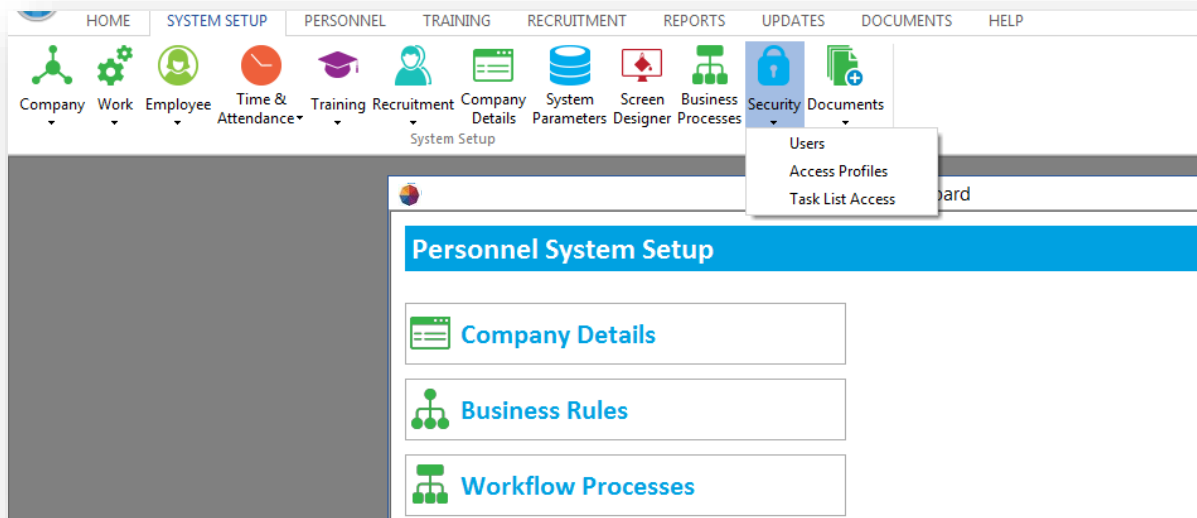
The employee drop down menu allows users to create contact types such as work, home etc.



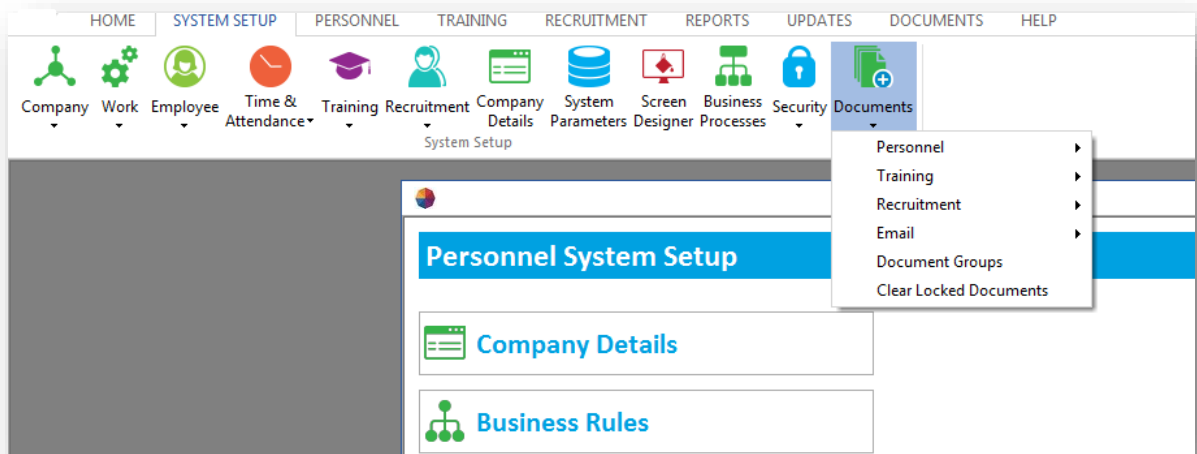
The time and attendance drop down menu will allow a user to configure a working pattern for an employee.



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

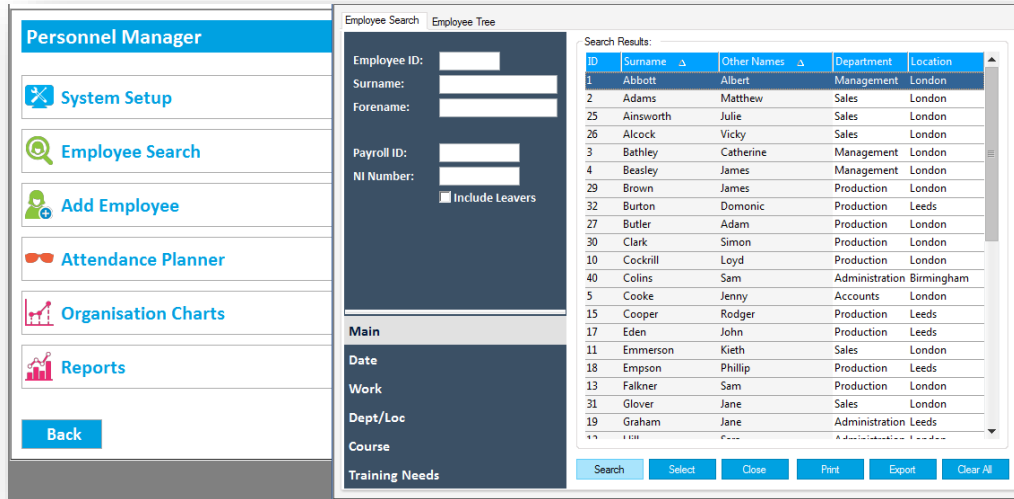


Here a user can configure the templates and emails that can then be used against their employee records.



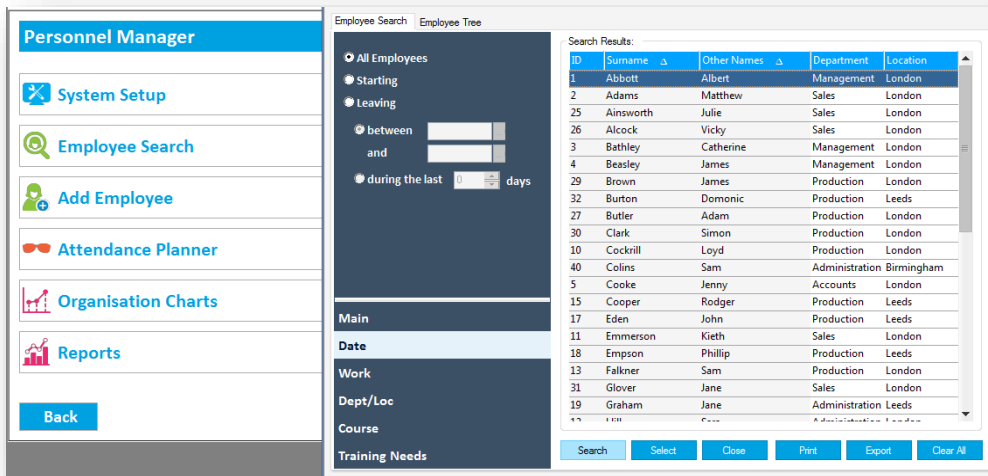
Employee Search

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

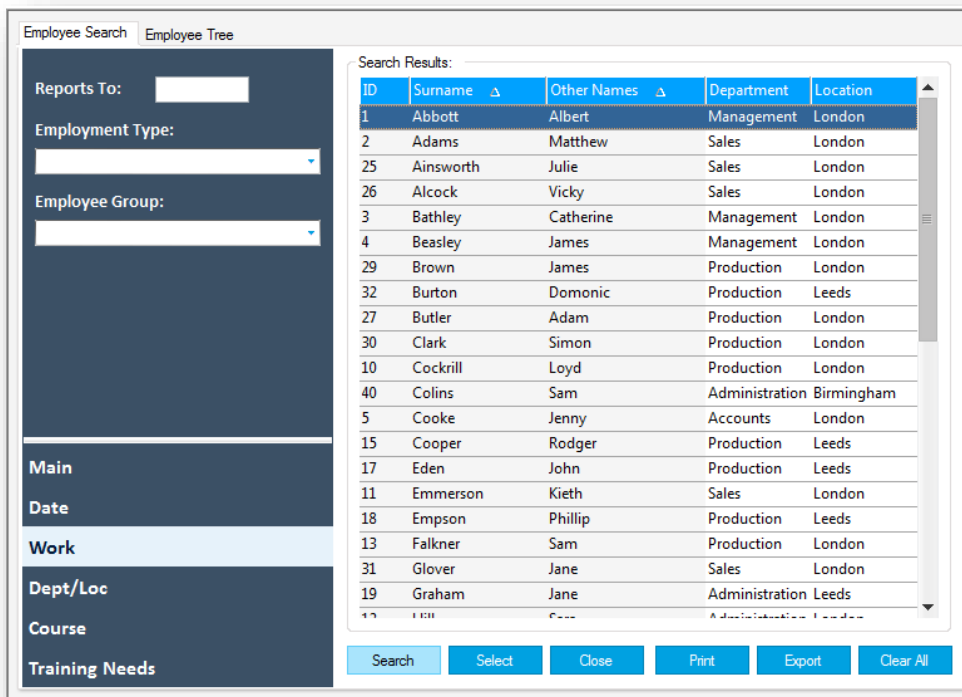


- Select Employee search from the dashboard
- To locate a current employee from here enter their name
- Press enter or select search.
- For a leaver enter the name check 'include leavers'
- Select search.

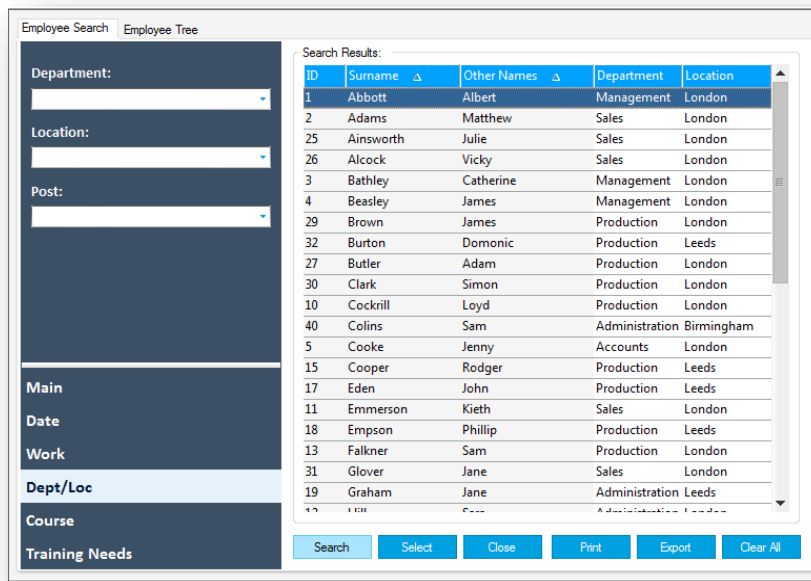
It is possible to search by employment dates.



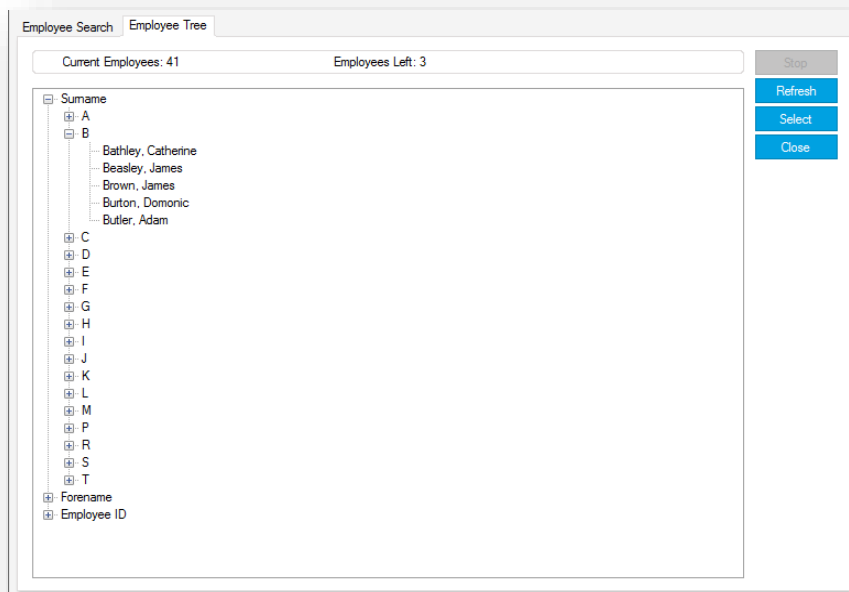
Here a user can search by reporting line, employment type or employee groups.



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



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 pro-rata holiday entitlement based on the values set in the system parameters.

- Select Add Employee
- 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.

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.

Date	Contact Type	M.	Address 1	Address 2	Address 3
05/01/2006	Home	<input checked="" type="checkbox"/>	92	Church Lane	London

- 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.

The screenshot shows the 'Emergency Contacts' tab in the Personnel Manager system. The left sidebar identifies the user as Albert Abbott, Human Resources Manager, with a profile picture and contact information. The main content area is divided into several sections: 'Emergency Contact' (with fields for Name, Relationship, Address, Postcode, and Contact Tel.), 'Medical Details' (with fields for Name, Address, Postcode, Telephone 1, Telephone 2, and Notes), and 'Emergency Contact' (with fields for Name, Relationship, Address, Postcode, and Contact Tel.). The right sidebar features a 'URGENT TASKS' section with a red exclamation mark icon, and a 'Holidays' section with a pie chart icon and buttons for 'Employment Calculator', 'Book Holiday', 'Record Absence', 'Attendance Record', 'Holiday Card', 'Save', and 'Cancel'.

RIGHT TO WORK

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

The screenshot shows the 'Right to Work' tab in the Personnel Manager system. The left sidebar is identical to the previous screenshot. The main content area is divided into several sections: 'Work Permit Details' (with fields for Work Permit, Work Permit Expires, Duration, Type of Permit, and Notes), 'Passport Details' (with fields for Passport, Passport Issued, Passport Expires, and Notes), 'Visa Details' (with fields for Valid From, Expiry Date, Type of Visa, and Notes), and 'Notice Periods' (with dropdown menus for Employee Notice and Employer Notice, both set to 2 Months). The right sidebar is identical to the previous screenshot.



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.

The screenshot shows the 'Banking Details' section of a software interface. The main content area contains a table with the following data:

Bank Name	Address 1	Address 2	Address 3	Address 4
HSBC	13 Sloane Sq	London		

Below the table are three buttons: 'Add...', 'Update...', and 'Delete'. The right-hand sidebar contains a 'URGENT TASKS' section with 'Absences' and 'Holidays' icons, and a list of buttons: 'Employment Calculator', 'Book Holiday', 'Record Absence', 'Attendance Record', 'Holiday Card', 'Save', and 'Cancel'.

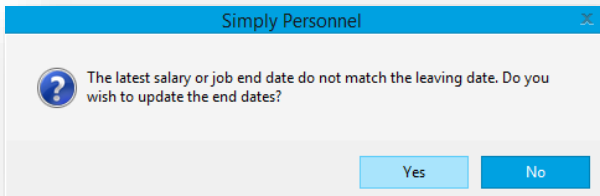
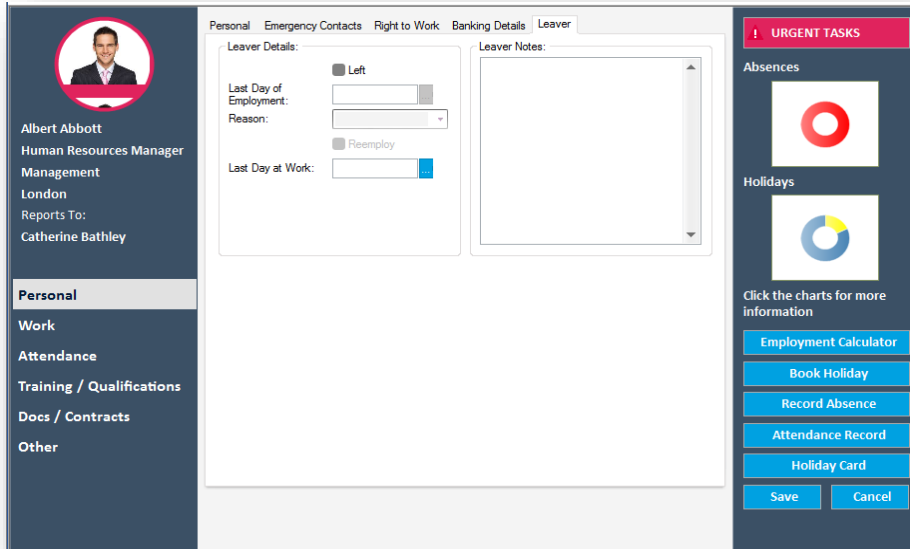
The 'Enter Details' dialog box contains the following input fields:

- Name: HSBC
- Address: 13 Sloane Sq, London
- Postcode: SW1 8SB
- Account Name: Mr Albert Abbott
- Sort Code: 00-00-00
- Account Number: 0000000
- Roll Number: (empty)

Buttons: OK, Cancel. A checkbox for 'Main Details' is checked.

LEAVER

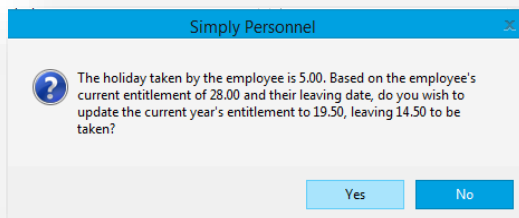
To record leaving dates enter the dates into the relevant fields and save the record. When the employee does leave check the 'left' box and enter the reason.



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.

pro-rata

The remaining leave will be calculated



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

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.

The screenshot shows the 'WORK' tab interface for Albert Abbott. The 'Work Details' section includes fields for Date Commenced (05/01/2006), Employment Type (Full Time), Internal Extension, Continuous Service Date, and Length of Service Profile (LOS 1). The 'Company Details' section includes Company E-mail (a.abbott@simplydemo), Security Level (0), How Recruited, and Recruitment Cost (£0.00). The 'Payroll Information' section includes a checked 'Include in Payroll' option, Payroll Number (01), and Payroll Company (Sage). The 'Working Duration (Days/Hours)' table shows 1 day and 07:30 hours for Monday through Friday, and 0 days and 07:30 hours for Saturday and Sunday. A 'Picture' field is present with an 'Import' button. A blue arrow points from the 'Import' button to a text box below.

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.

The screenshot shows the 'Job / Salary' management interface. On the left is a user profile for Albert Abbott, Human Resources Manager. The main area contains two tables: 'Job History' and 'Salary History'. The 'Job History' table has columns for Tasks, From, To, Post, Location, and Department. The 'Salary History' table has columns for Tasks, From, To, Pay, Post, and Notes. On the right, there is a sidebar with 'URGENT TASKS' and various utility buttons like 'Employment Calculator', 'Book Holiday', 'Record Absence', 'Attendance Record', 'Holiday Card', 'Save', and 'Cancel'.

Tasks	From	To	Post	Location	Department
	28/08/2015		Human Resources ...	London	Management
	05/01/2006	27/08/2015	Administrator	London	Management

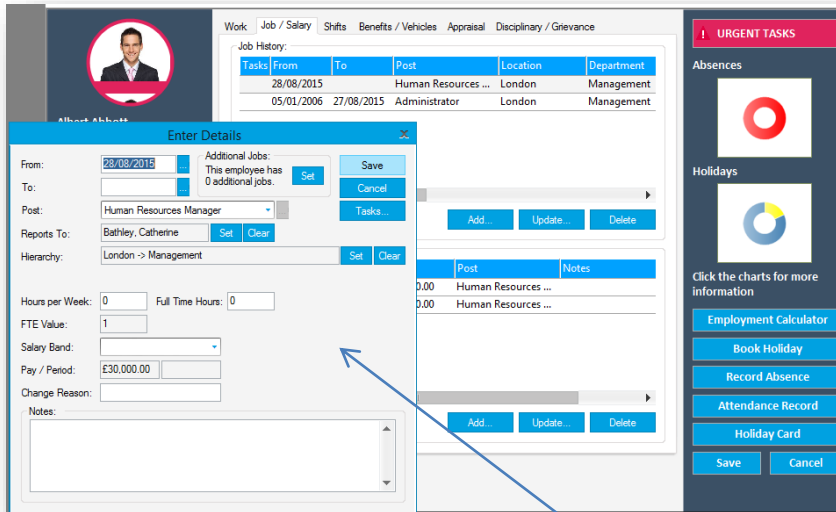
Tasks	From	To	Pay	Post	Notes
	01/09/2015		30000.00	Human Resources ...	
	05/01/2006	31/08/2015	27000.00	Human Resources ...	



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.



- Select Add below the job section
- Enter the new job information
- Select Save

Here is also where the user sets the banding

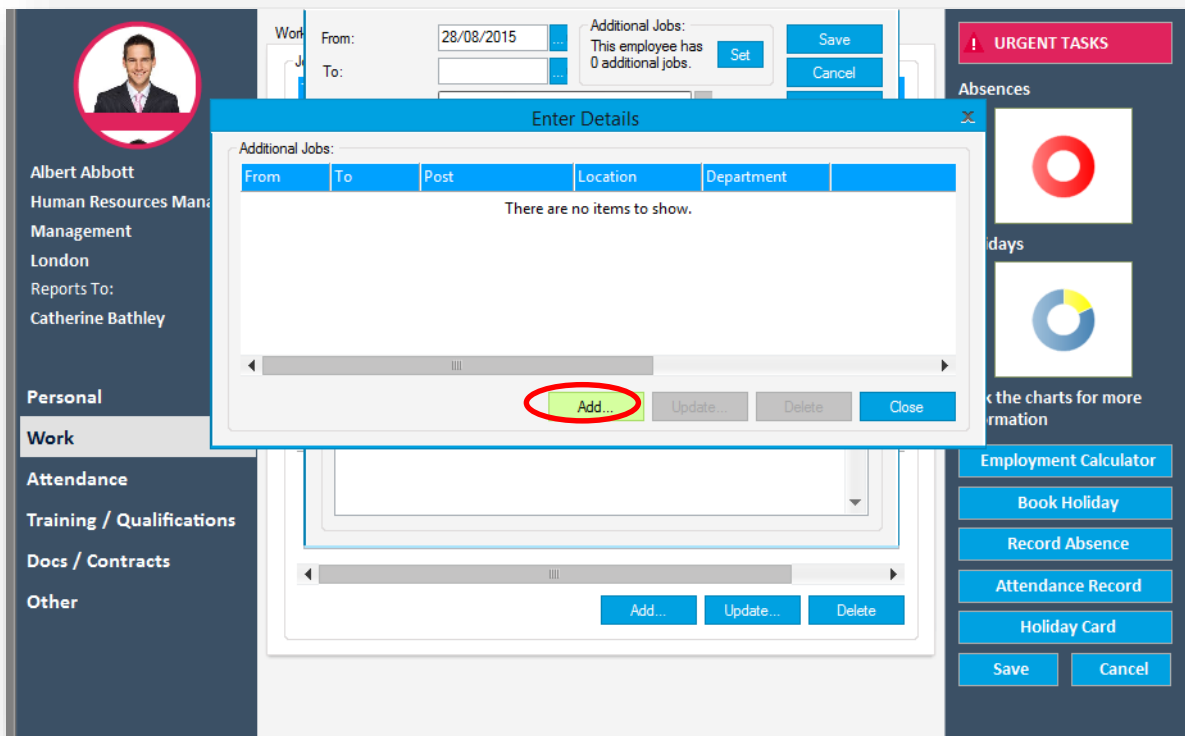


The update function will allow the user to amend existing information it will not retain the previous job information this functionality will override.

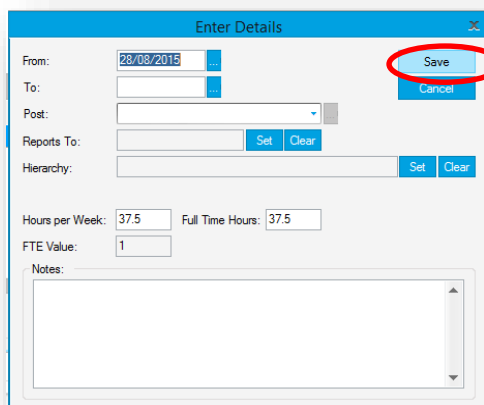
Delete will completely delete the job record.

ADDITIONAL JOBS

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



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



- 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.

The screenshot shows the 'Enter Details' form for an employee's salary history. The form is divided into several sections. On the left, there are date pickers for 'From' (05/01/2006) and 'To' (31/08/2015), a 'Salary Award Date' field, a 'Period' dropdown, and a 'Post' dropdown (Human Resources Manager). Below these are fields for 'Salary Grade', 'Salary' (27,000.00), 'Monthly Salary' (2,250.00), 'Pro Rata Salary' (27,000.00), 'Hourly Rate' (0.00000), 'Overtime Rate' (0.00000), 'Double Time Rate' (0.00000), and 'Total Salary Package' (0.00000). In the middle, there is a 'Daily Absence Cost' field (0.00), a note about reporting, an 'FTE Value' field (1), a note about FTE value, a 'Currency Code' dropdown, 'Exchange Rate' (0), 'Euro Value' (€0.00), 'Salary Sacrificed' (0.00), and a 'Sacrifice Notes' text area. On the right, there are buttons for 'Save', 'Cancel', 'Tasks...', and 'Calculations'. Below the form, there is a table with columns 'Location' and 'Department', showing 'London' and 'Management'. Below the table are buttons for 'Add...', 'Update...', and 'Delete'. On the far right, there is a sidebar with 'URGENT TASKS' and several buttons: 'Absences', 'Holidays', 'Employment Calculator', 'Book Holiday', 'Record Absence', 'Attendance Record', 'Holiday Card', 'Save', and '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'

The screenshot shows the 'Work Period Maintenance' dialog box. The 'Details' section includes a 'Name' field with 'Full Time' and a 'Description' field with 'Full time'. There is a checked 'Is Active' checkbox. Below this is a table with columns: Day, Start Time, End Time, Grace IN (mins), Grace OUT (mins), Break Hours, Work Hours (hrs), and Days.

Day	Start Time	End Time	Grace IN (mins)	Grace OUT (mins)	Break Hours	Work Hours (hrs)	Days
<input checked="" type="checkbox"/> Monday	00:00	00:00	0	0	00:00	07:30	1
<input checked="" type="checkbox"/> Tuesday	00:00	00:00	0	0	00:00	07:30	1
<input checked="" type="checkbox"/> Wednesday	00:00	00:00	0	0	00:00	07:30	1
<input checked="" type="checkbox"/> Thursday	00:00	00:00	0	0	00:00	07:30	1
<input checked="" type="checkbox"/> Friday	00:00	00:00	0	0	00:00	07:30	1
<input checked="" type="checkbox"/> Saturday	00:00	00:00	0	0	00:00	00:00	0
<input type="checkbox"/> Sunday	00:00	00:00	0	0	00:00	00:00	0
					0:00	37:30	5.00

Buttons at the bottom include 'Cancel' and 'Help'. On the right side of the dialog, there are 'Add...', 'Update...', and 'Delete' buttons.

- To assign a shift pattern select add
- Select OK

The screenshot shows the 'Enter Details' dialog box. It has a 'Details' section with a 'Shift' dropdown menu set to 'Night Staff', a 'Start' date field with '09/09/2015', and an 'End' date field with '09/09/2022'. There are 'OK' and 'Cancel' buttons. The background shows the 'Shifts' tab in the main application window, with a table that currently has no items.

BENEFITS & VEHICLES

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

The screenshot shows the 'Benefits & Vehicles' section of the Personnel Manager software. The interface is divided into a sidebar on the left, a main content area, and a right-hand sidebar. The sidebar on the left contains a user profile for Albert Abbott, Human Resources Manager, and a navigation menu with categories like Personal, Work, Attendance, Training / Qualifications, Docs / Contracts, and Other. The main content area has tabs for Work, Job / Salary, Shifts, Benefits / Vehicles, Appraisal, and Disciplinary / Grievance. The 'Benefits / Vehicles' tab is active, showing a table of benefits and a table of vehicle history. The benefits table has columns for Tasks, Benefit, Start, End, Number, Value, and Notes. The vehicle history table has columns for Tasks, Date Issued, Make, Model, Registration, and Colour. There are 'Add...', 'Update...', and 'Delete' buttons for both tables. Below the vehicle history table is a 'Driving Licence Details' section with input fields for 'Driving Licence', 'Licence Issued', and 'Licence Expires'. The right-hand sidebar has a 'URGENT TASKS' section with buttons for 'Absences', 'Holidays', 'Employment Calculator', 'Book Holiday', 'Record Absence', 'Attendance Record', 'Holiday Card', 'Save', and 'Cancel'.

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

The screenshot shows the 'Enter Details' dialog box in the Personnel Manager software. The dialog box has a title bar 'Enter Details' and a close button. It contains a 'Benefit' dropdown menu set to 'Bonus', a 'Start Date' field set to '09/09/2015', an 'End Date' field, a 'Number' field set to '1', and a 'Value' field set to '£0.00' with a 'GBP' currency dropdown. There is a 'Notes' text area on the right. Below these fields is a 'PHI Benefit' section with a checkbox and input fields for 'Membership Number', 'Type', 'Enrolment Date', 'Provider', 'Group Number', and 'Plan'. To the right of the PHI section is a 'Dependants' table with columns for Surname, Forename, Relationship, Enrolme..., Date of ..., and Curre... The table is currently empty with the message 'There are no items to show.' and 'Add...', 'Update...', and 'Delete' buttons below it. On the far right, there are 'Save', 'Cancel', and 'Tasks...' buttons.

VEHICLE

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

The screenshot shows the 'Enter Details' form for a vehicle. The 'Save' button is circled in red. The form includes the following fields:

- Issued: 10/05/2014
- Returned: [empty]
- Make: BMW
- Model: [empty]
- Colour: Black
- Fuel Type: diesel
- First Registered: [empty]
- Insurance Details: Company, Policy Number, Value, Start Date, End Date
- Details: [empty text area]
- Notes: [empty text area]
- Licence Issued: [empty]
- Licence Expires: [empty]

The background shows a 'Benefits' table:

Tasks	Benefit	Start	End	Number	Value	Notes
	Laptop	10/05/2015		1	300.00	
	Mobile Phone	10/05/2010		1	100.00	

- 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.

The screenshot shows the 'Appraisal' module interface. On the left is a user profile for Albert Abbott, Human Resources Manager, London, reporting to Catherine Bathley. The main area displays a table with appraisal tasks:

Tasks	Review Date	Reviewer	Notes
	01/09/2014	Catherine Bathley	Objectives and KPI for upcoming ye

Below the table are 'Add...', 'Update...', and 'Delete' buttons. On the right sidebar, there are sections for 'URGENT TASKS', 'Absences', and 'Holidays', along with various utility buttons like 'Employment Calculator', 'Book Holiday', 'Record Absence', 'Attendance Record', 'Holiday Card', 'Save', and 'Cancel'.

- Select add
- Enter the details
- Select save

The 'Enter Details' dialog box contains the following fields and controls:

- Review Date: 09/09/2015 (with a calendar icon)
- Reviewed By: (with a dropdown icon)
- Next Review: (with a dropdown icon)
- Notes: (text area)
- Action Plan: (text area)
- Buttons: Save, Cancel, Tasks...
- Checkbox: Closed

DISCIPLINARY AND GRIEVANCE

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

The screenshot shows the Personnel Manager software interface. On the left is a user profile for Albert Abbott, Human Resources Manager. The main area is divided into 'Disciplinary' and 'Grievance' sections. Both sections show empty tables with columns for 'Tasks', 'Action Date', 'Problem', 'Action Type', and 'Appeal Date'. The 'Add...' button in the Disciplinary section is circled in red. On the right, there is a sidebar with 'URGENT TASKS' and various utility buttons like 'Employment Calculator', 'Book Holiday', 'Record Absence', 'Attendance Record', 'Holiday Card', 'Save', and 'Cancel'.

DISCIPLINARY

- Select Add
- Enter the details
- Select save

The 'Enter Details' dialog box is shown. It contains fields for 'Action Date' (09/09/2015), 'Description', 'Action Type', 'Action', 'Appeal Date', 'Appeal Notes', and 'Followup Notes'. There is a 'Closed' checkbox and a 'Save' button circled in red. Other buttons include 'Cancel' and 'Tasks...'.

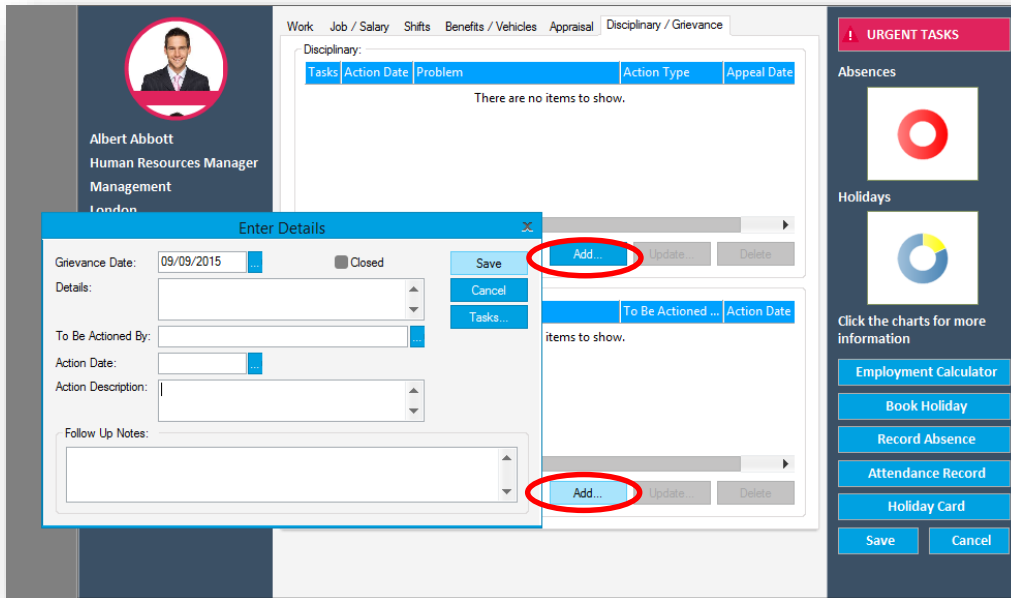


The action type list is populated from the business rules optional side. Appeal dates will create a reminder.

GRIEVANCE

This section is used to record grievance dates and key information

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



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.

The screenshot shows the 'Absence' recording interface. On the left is a user profile for Albert Abbott, Human Resources Manager. The main area is titled 'Absence' and 'Holidays'. It features a date range selector (From: 01/01/2015 To: 31/12/2015) and a table of absences. The table has columns for Tasks, Category, Reason, Start, End, Duration, and Hours. One record is shown: Sick, Flu, 15/01/2015, 16/01/2015, 2.00, 15:00. Below the table are buttons for 'Add...', 'Update...', and 'Delete'. There is also a checkbox for 'Only Show Absence Scheme Records'. Further down, there are fields for 'Entitlement Profile' (Manager), 'Absences' (1), 'Total Duration' (2.00), 'Paid at Full Rate' (0.00), 'Paid at Reduced Rate' (0.00), and 'Unpaid' (2.00). A 'Prevent paid entitlement to be given' checkbox is also present. At the bottom, there is a 'Bradford Factor' field (2.00) and a 'Maternity / Paternity / SPL Calculator' button. On the right side, there is a sidebar with 'URGENT TASKS', 'Absences' and 'Holidays' pie charts, and buttons for 'Employment Calculator', 'Book Holiday', 'Record Absence', 'Attendance Record', 'Holiday Card', 'Save', and 'Cancel'.

Here the user can apply the Company sick pay 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

The screenshot shows the 'Enter Details' form for adding an absence. The form is divided into several sections:

- Category:** Appointment
- Reason For Absence:** Dentist
- From:** 09/09/2015
- To:** [Empty]
- Duration (Days/Hrs):** 0 days, 0:00 hours
- Medical Certificate Required:** [Unchecked]
- Self Certification Form Required:** [Unchecked]
- Back to Work Interview Required:** [Unchecked]

On the right side of the form, there is a table with the following data:

End	Duration	Hours
16/01/2015	2.00	15:00

A blue callout box points to the '2.00' value in the Duration column, with the text: "The absence scheme score will begin to calculate 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 / Paternity / SPL

Criteria:
Department: <<ALL>>
Location: <<ALL>>
Employee Group: <<ALL>>

Show Leave Between:
Start Date: 09/03/2015
End Date: 09/09/2016

Print Options:
 Include Maternity
 Include Paternity
 Include Leavers

Print
Print Preview
Close

Maternity / SPL

Details

Employee: 1 - Albert Abbott

Expected Date of Childbirth: 08/04/2016

Qualifying Week: 25/12/2015

Continuous Weeks Service: 535

Earliest Start Date: 22/01/2016

Actual Start Date: 02/03/2016

Ordinary Maternity Leave Return Date: 31/08/2016

Actual Return Date:

6 Weeks SMP Salary: £139.58

SPL Entitlement End Date: 01/03/2017

Start Date Due to Pregnancy Related Illness: 11/03/2016

Additional Maternity Leave / SPL

Additional Maternity Leave Return Date: 01/03/2017

Paid AML Ends: 29/11/2016

Save
Cancel

Return Date	Paid AML	SPL Reque...	SPL Ends
29/11/2016	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	01/03/2017

Add... Update... Delete

al End... Qualifies f... SPL Reque... SPL Ends

Add... Update... Delete

Create Absence



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.

The screenshot shows the 'Holidays' management interface. On the left is a user profile for Albert Abbott, Human Resources Manager. The main area is divided into 'Holiday Years' and 'Holidays' sections.

Holiday Years:

Profile Name	Year	Entitle...	Brought Forw...	Ho...	Additio...	Bank Holi
Holiday Year	2015	28.00	0.00	<input type="checkbox"/>	0.00	England a

Normal Entitlement: 28.00 [Accrual...] [Add...] [Update...] [Delete]

Holidays:

Tasks	Year Number	Start Date	End Date	Taken	Hours	Narrative
	2015	02/09/2015	02/09/2015	1.00	7:30	
	2015	25/08/2015	28/08/2015	4.00	30:00	

Total Annual Entitlement (This Year): 28.00 [Add...] [Update...] [Delete]

Taken / Allocated / Remaining: 5.00 / 0.00 / 23.00

The right-hand sidebar contains an 'URGENT TASKS' section, two charts (Absences and Holidays), and a list of buttons: Employment Calculator, Book Holiday, Record Absence, Attendance Record, Holiday Card, Save, and Cancel.

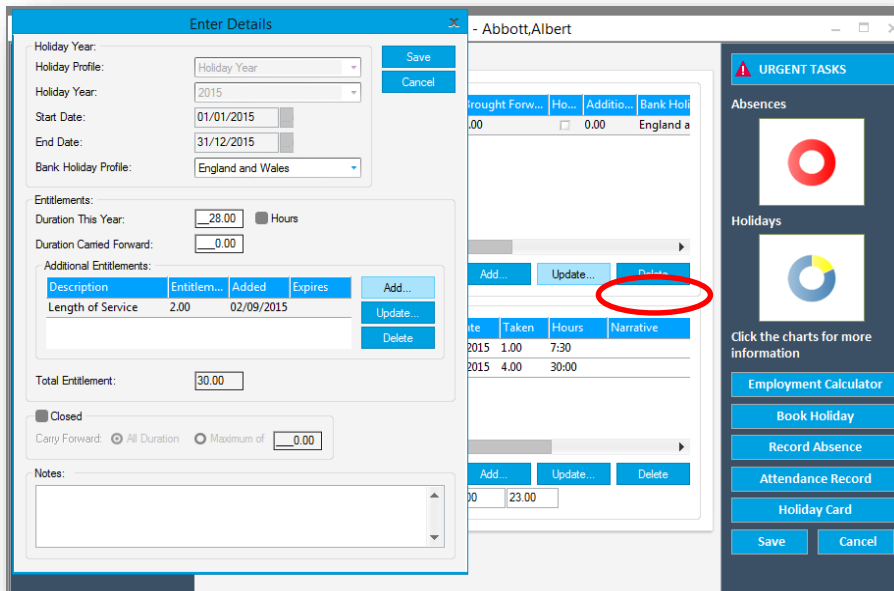


The Add functionality will add a new; the update functionality will update and override an existing the delete functionality will delete.

HOLIDAY YEARS

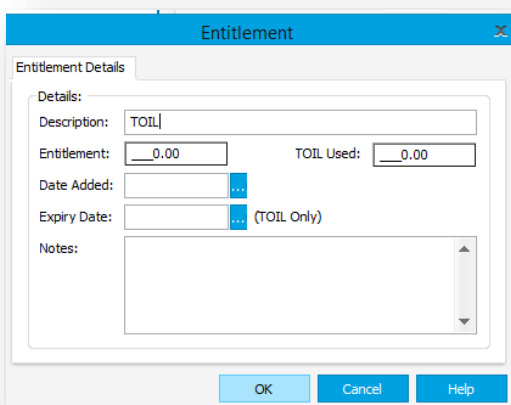
This section of the attendance tab a user can amend the individual's holiday entitlement, and also add additional entitlement.

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



Additional Entitlements

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



HOLIDAYS

To add holidays dates to the record

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

The screenshot shows the 'Holidays' management interface. On the left, a user profile for Albert Abbott is displayed. The main area features a table with columns: Profile Name, Year, Entitlement, Brought Forw..., Ho..., Additio..., and Bank Ho... The table shows a row for 'Holiday Year 2015' with an entitlement of 28.00. An 'Enter Details' dialog box is open, with fields for Start Date (09/09/2015), End Date, Duration (0 days, 0.00 hours), Planner Colour (yellow), Category, and a checkbox for 'Bank Holiday'. The dialog also has 'Save', 'Cancel', and 'Tasks...' buttons. Below the dialog, a table shows holiday records with columns: Start Date, Taken, Hours, and Narrative. It lists two entries: 09/09/2015 (1.00 taken, 7:30 hours) and 08/08/2015 (4.00 taken, 30:00 hours). The right sidebar includes a 'URGENT TASKS' section, 'Absences' and 'Holidays' charts, and a list of buttons: 'Employment Calculator', 'Book Holiday', 'Record Absence', 'Attendance Record', 'Holiday Card', 'Save', and '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.

The screenshot shows the 'Holiday Accrual' dialog box in a software application. The dialog box has a title bar 'Holiday Accrual' and a close button. It contains a 'Details' section with explanatory text and a 'Use Accrual' checkbox. Below this, there are input fields for 'Monthly Accrual' (set to 0), 'Day to Update' (set to 31), and 'Next Update' (set to 31/10/2015). The 'Next Update' field is circled in red. At the bottom of the dialog are 'OK', 'Cancel', and 'Help' buttons. The background shows the user profile for Albert Abbott, with a 'Holidays' tab selected. The 'Holidays' table shows a task for 2015 from 02/09/2015 to 02/09/2015. The 'Total Annual Entitlement (This Year)' is 28.00, and 'Taken / Allocated / Remaining' is 5.00 / 0.00 / 23.00.

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

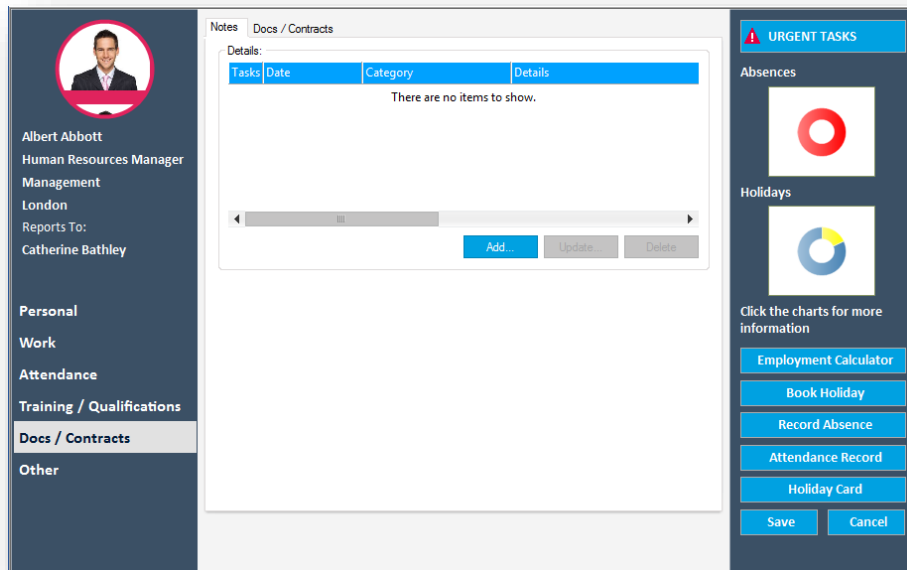
TRAINING AND QUALIFICATIONS

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.

The screenshot displays the 'Training / Qualifications' interface. On the left is a user profile for Albert Abbott, Human Resources Manager, located in London, reporting to Catherine Bathley. The main area is divided into two sections: 'Training' and 'Qualifications'. Both sections currently show 'There are no items to show.' The 'Training' section has columns for Tasks, Date, Course, Duration, CPD Hours, Internal, and Status. The 'Qualifications' section has columns for Tasks, Qualification, Subject, Date Passed, Grade, and Expiry. On the right side, there is a 'URGENT TASKS' section with a red warning icon, and a sidebar with various HR tools: Absences (with a red circle chart), Holidays (with a pie chart), Employment Calculator, Book Holiday, Record Absence, Attendance Record, Holiday Card, Save, and Cancel. A note says 'Click the charts for more information'.

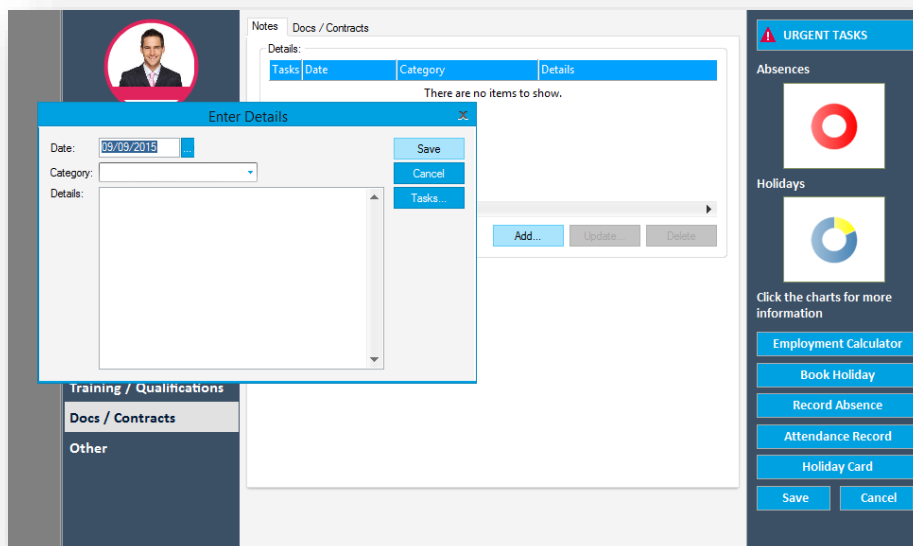
DOCS/CONTRACTS

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



NOTES

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



- 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:

Document Group: <<ALL>>

Date Created	Description	Group	Linked
06/05/2008	employment contract merged at 06...	Contract	<input type="checkbox"/>

Mail Merge New Doc Insert Document Email... Open Delete Rename

Employee has a valid contract of employment

URGENT TASKS

Absences

Holidays

Click the charts for more information

Employment Calculator

Book Holiday

Record Absence

Attendance Record

Holiday Card

Save Cancel

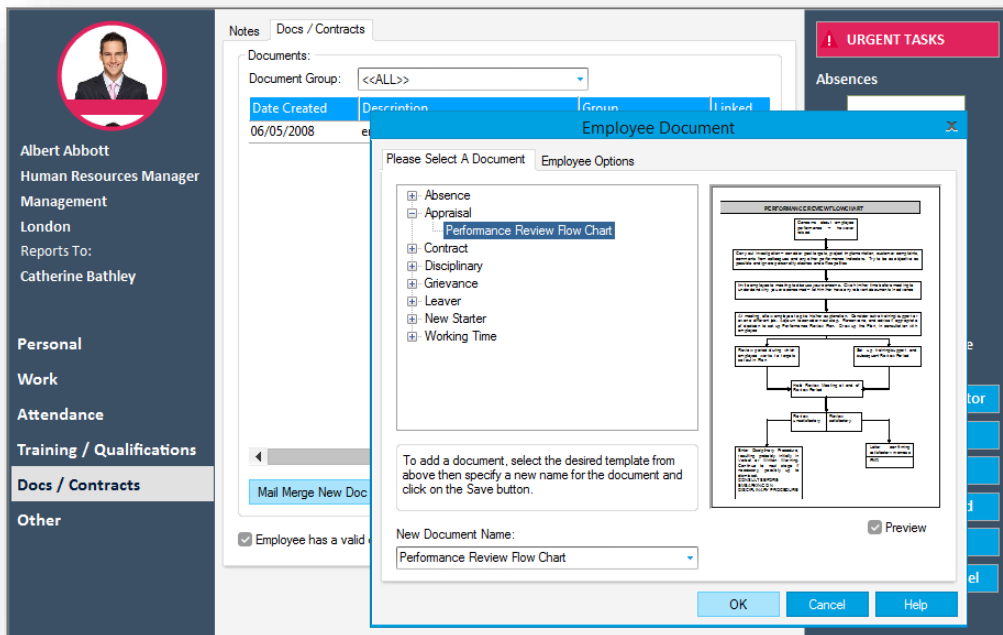
Open will open a highlighted document.

Delete will completely remove the associated document

Rename will amend the title of the highlighted document.

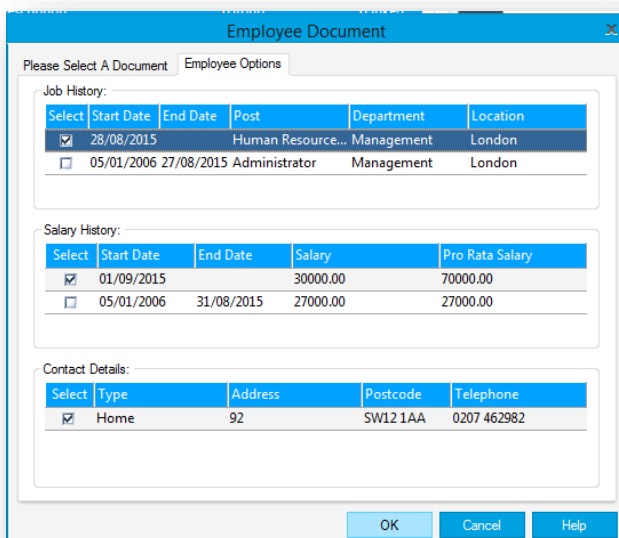
MAIL MERGE

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.



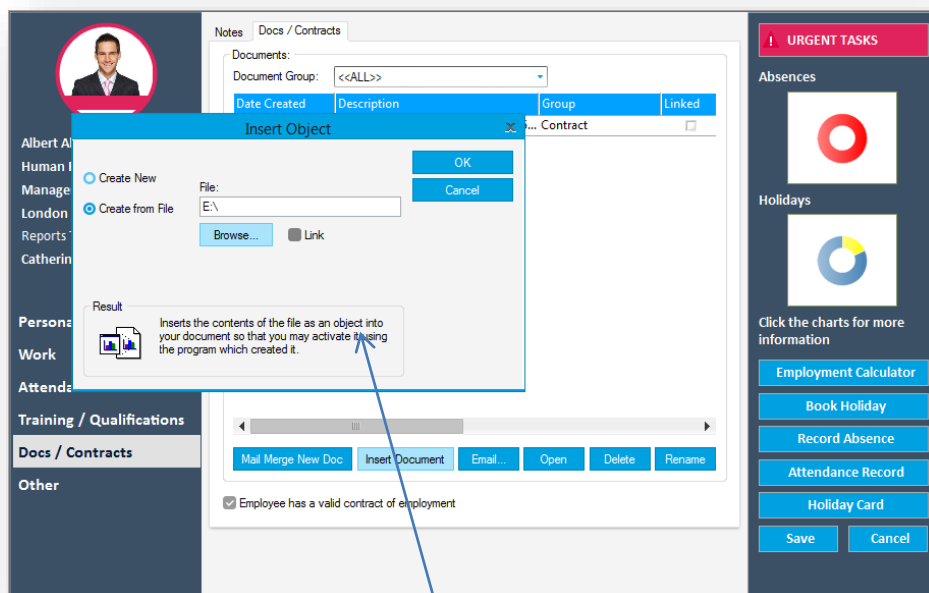
- Select Mail Merge New Doc
- Select the template
- Click OK

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



INSERT DOCUMENT

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



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.

Select Template

New Starter
New Starter

Email Details:
Address: Work Email
 Contact Email
Copy in Sender: Do not send

Save Options:
Description:
 Save Email
 Save Attachments

Attachments:
Attachment
There are no items to show.

Email:
From Address: donotreply@spdemo.com
To:
CC:
BCC:
Subject:
 Use HTML

Body:
Dear [[Employee.Forename]],
Welcome to the SP demo business I would like to take this opportunity to congratulate you on your new position with us.
We have an online employee Self Service system to allow you to request holiday , amend your personnel information and review policy documents..
Here is the link:
www.spdemoselfservice.com
Your credentials are:

Select one of 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.

[[Course.UserDefinedNumber10]]
[[Course.UserDefinedNumber8]]
[[Course.UserDefinedNumber9]]
[[Employee.AnnualEntitlement]]
[[Employee.CompanyEmail]]
[[Employee.ContinuousServiceDate]]
[[Employee.DateCommenced]]
[[Employee.DateLeft]]
[[Employee.DateOfBirth]]
[[Employee.Dependants]]
[[Employee.Disabled]]
[[Employee.DrivingLicence]]
[[Employee.DrivingLicenceExpires]]
[[Employee.DrivingLicenceIssued]]
[[Employee.EC1Address1]]
[[Employee.EC1Address2]]
[[Employee.EC1Address3]]

Control:

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



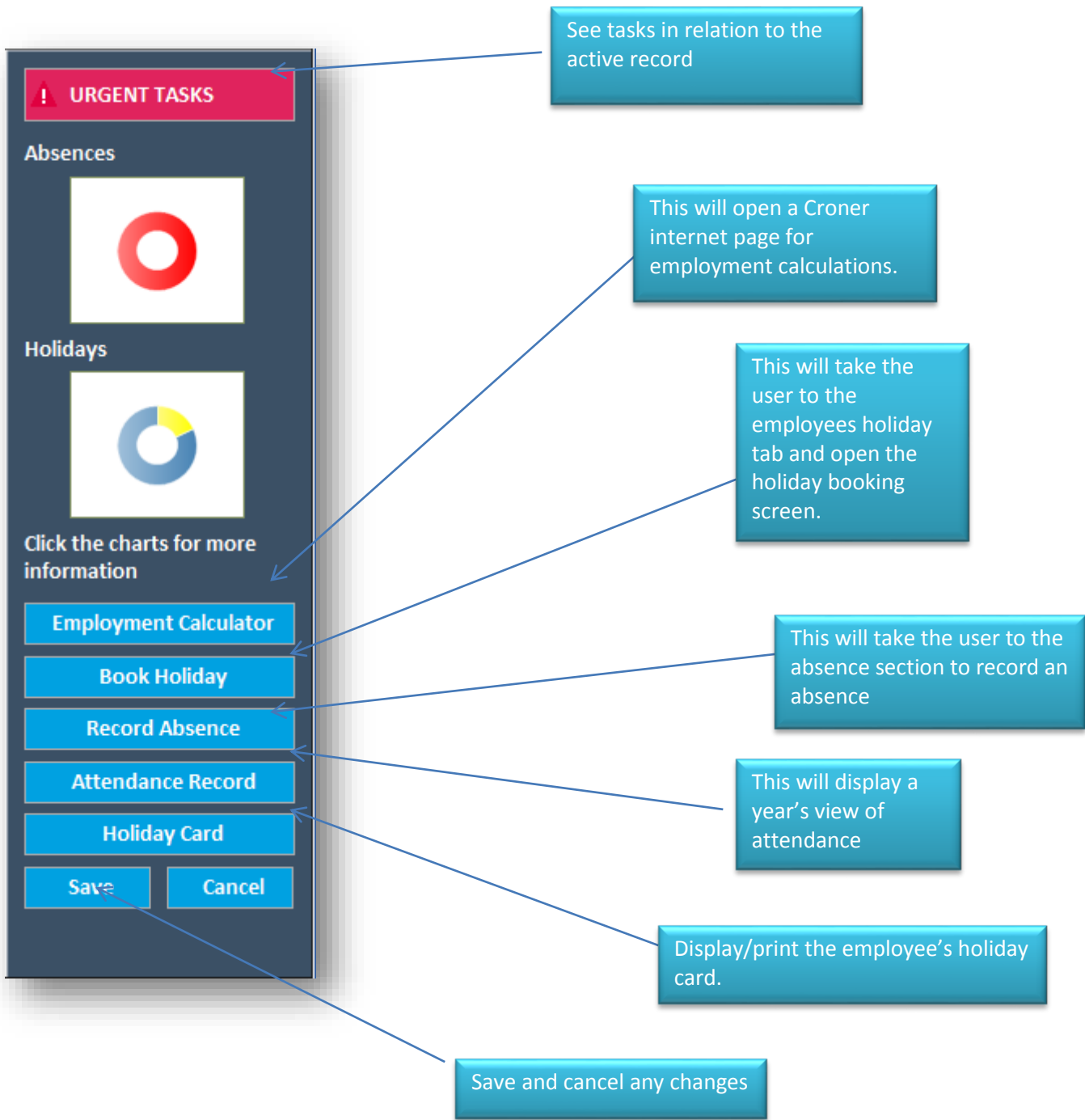
The correct SMTP settings must be configured within the system parameters in order to send emails.

OTHER

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

The screenshot displays the Personnel Manager software interface. On the left is a dark blue sidebar with a user profile for Albert Abbott, Human Resources Manager, and a menu with categories: Personal, Work, Attendance, Training / Qualifications, Docs / Contracts, and Other (highlighted). The main content area is titled 'Processes' and contains a table with columns: Tasks, Description, Status, Date, and Next Step. The table is currently empty, displaying the message 'There are no items to show.' Below the table are 'Add...', 'Update...', and 'Delete' buttons. On the right side, there is a 'URGENT TASKS' notification, two charts for 'Absences' and 'Holidays', and a list of buttons: Employment Calculator, Book Holiday, Record Absence, Attendance Record, Holiday Card, Save, and 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

Albert Abbott 2015																							
January						February						March											
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat			
			1	2	3		1	2	3	4	5	6	7	1	2	3	4	5	6	7			
4	5	6	7	8	9	10	8	9	10	11	12	13	14	8	9	10	11	12	13	14			
11	12	13	14	15	16	17	15	16	17	18	19	20	21	15	16	17	18	19	20	21			
18	19	20	21	22	23	24	22	23	24	25	26	27	28	22	23	24	25	26	27	28			
25	26	27	28	29	30	31								29	30	31							

Colour	Description	Show
	Appointment-> Dentist	<input checked="" type="checkbox"/>
	Appointment-> Doctor	<input checked="" type="checkbox"/>
	Appointment-> Medical	<input checked="" type="checkbox"/>
	Maternity-> Maternity leave	<input checked="" type="checkbox"/>
	Sick-> Backache	<input checked="" type="checkbox"/>
	Sick-> Flu	<input checked="" type="checkbox"/>
	Sick-> Headache	<input checked="" type="checkbox"/>
	Sick-> Sick	<input checked="" type="checkbox"/>
	Sick-> Stomach Ache	<input checked="" type="checkbox"/>
	Holiday	<input checked="" type="checkbox"/>
	Course	<input checked="" type="checkbox"/>

April						May						June									
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	
			1	2	3	4				1	2	3				1	2	3	4	5	6
5	6	7	8	9	10	11	3	4	5	6	7	8	9	7	8	9	10	11	12	13	
12	13	14	15	16	17	18	10	11	12	13	14	15	16	14	15	16	17	18	19	20	
19	20	21	22	23	24	25	17	18	19	20	21	22	23	21	22	23	24	25	26	27	
26	27	28	29	30			24	25	26	27	28	29	30	28	29	30					
						31															

July						August						September									
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	
			1	2	3	4				1	2	3				1	2	3	4	5	
5	6	7	8	9	10	11	2	3	4	5	6	7	8	6	7	8	9	10	11	12	
12	13	14	15	16	17	18	9	10	11	12	13	14	15	13	14	15	16	17	18	19	
19	20	21	22	23	24	25	16	17	18	19	20	21	22	20	21	22	23	24	25	26	
26	27	28	29	30	31		23	24	25	26	27	28	27	28	29	30					
						31	30	31													

October						November						December								
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4				1	2	3				1	2	3	4	5
4	5	6	7	8	9	10	3	4	5	6	7	8	6	7	8	9	10	11	12	
11	12	13	14	15	16	17	9	10	11	12	13	14	13	14	15	16	17	18	19	
18	19	20	21	22	23	24	16	17	18	19	20	21	20	21	22	23	24	25	26	
25	26	27	28	29	30	31	23	24	25	26	27	28	27	28	29	30	31			

09/09/2015 <
> 09/09/2015

Criteria:

Show Single Day Absences On: <<ALL>> Only show Absence Scheme absences

Display Order: Holidays, Absences, Courses

Select All Deselect All

Save Image Print

Month View Close

HOLIDAY CARD

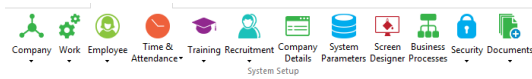
The Holiday Card provides an overview of the employee's holiday record.

The screenshot displays the 'Holiday Card' interface for employee Abbott, Albert. It includes fields for Employee, Holiday Profile, Holiday Year, and date ranges. Summary statistics for entitlements and taken/allocated amounts are shown. Two checkboxes are checked: 'Display Bank Holidays when Printing' and 'Display Holiday Year Notes'. A table lists holiday events with columns for Start Date, End Date, Duration, and Notes.

Start Date	End Date	Duration	Notes
02/09/2015	02/09/2015	1.00	
25/08/2015	28/08/2015	4.00	

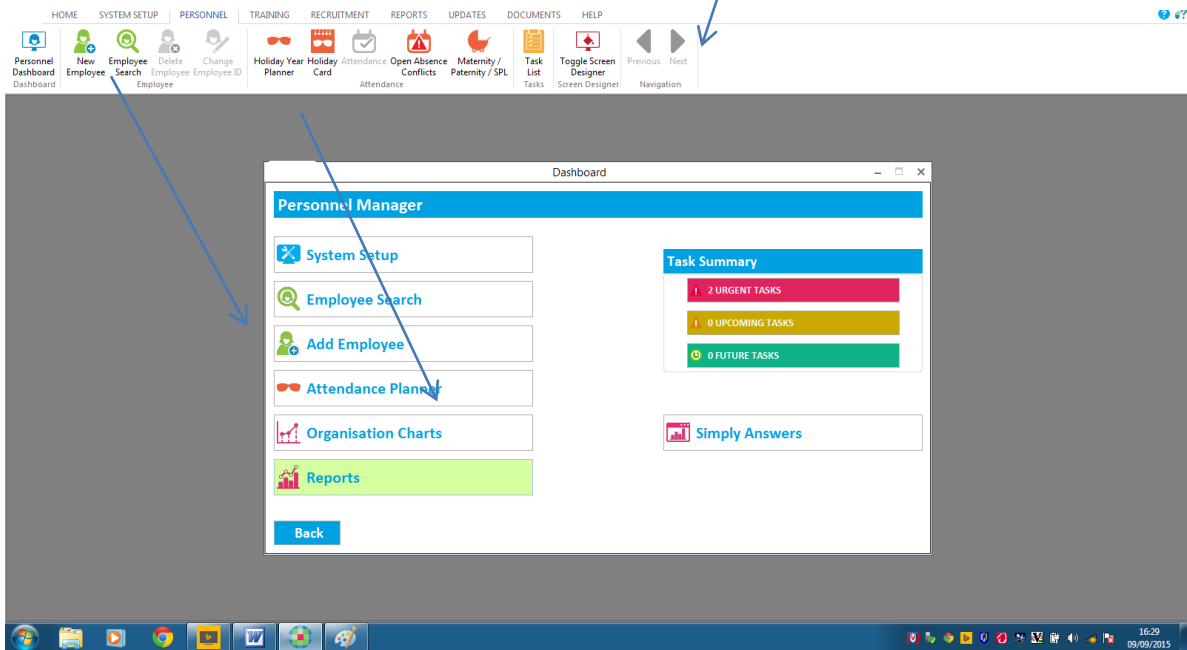
Personnel Toolbar

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.



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:

Use the filters to view a certain department/location/employee group

Go to a specific date.

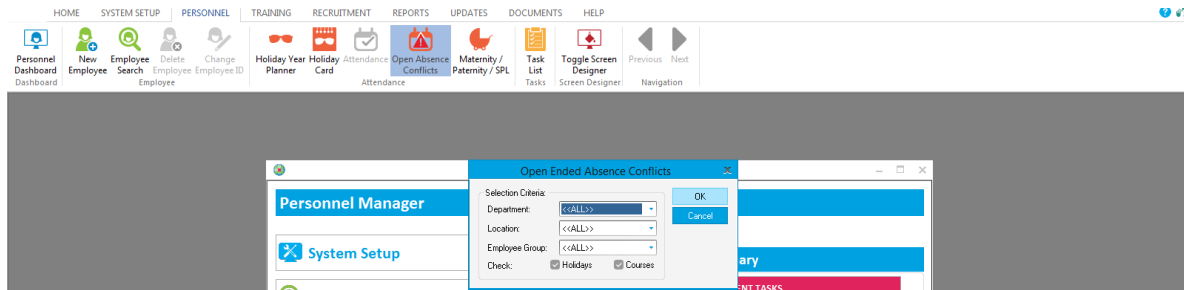
Print off the planner

The screenshot shows the Attendance Planner interface. At the top, there are several filter and control elements: Department and Location dropdowns (both set to '<<ALL>>'), Employee Group dropdown (set to '<<ALL>>'), Show Dates Within Range (Start Date: 01/01/2015, End Date: 31/12/2015), Options (Show Holidays, Show Absences, Show Courses), Go To (09/09/2015), Status (<<ALL>>), and Show Weeks (5). There are also 'View Details', 'Print', and 'Print Preview' buttons. Below the filters is a calendar view for August - October 2015. The calendar shows days from Monday to Saturday/Sunday. A yellow highlight is on Wednesday, 2nd September, with the name 'Albert Abbott' below it. A blue highlight is on Wednesday, 9th September. The calendar also shows '1 September' and '1 October'.

MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SAT/SUN
31 August	1 September	2 Albert Abbott	3	4	5
7	8	9	10	11	12
14	15	16	17	18	19
21	22	23	24	25	26
28	29	30	1 October	2	3
					4

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.



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

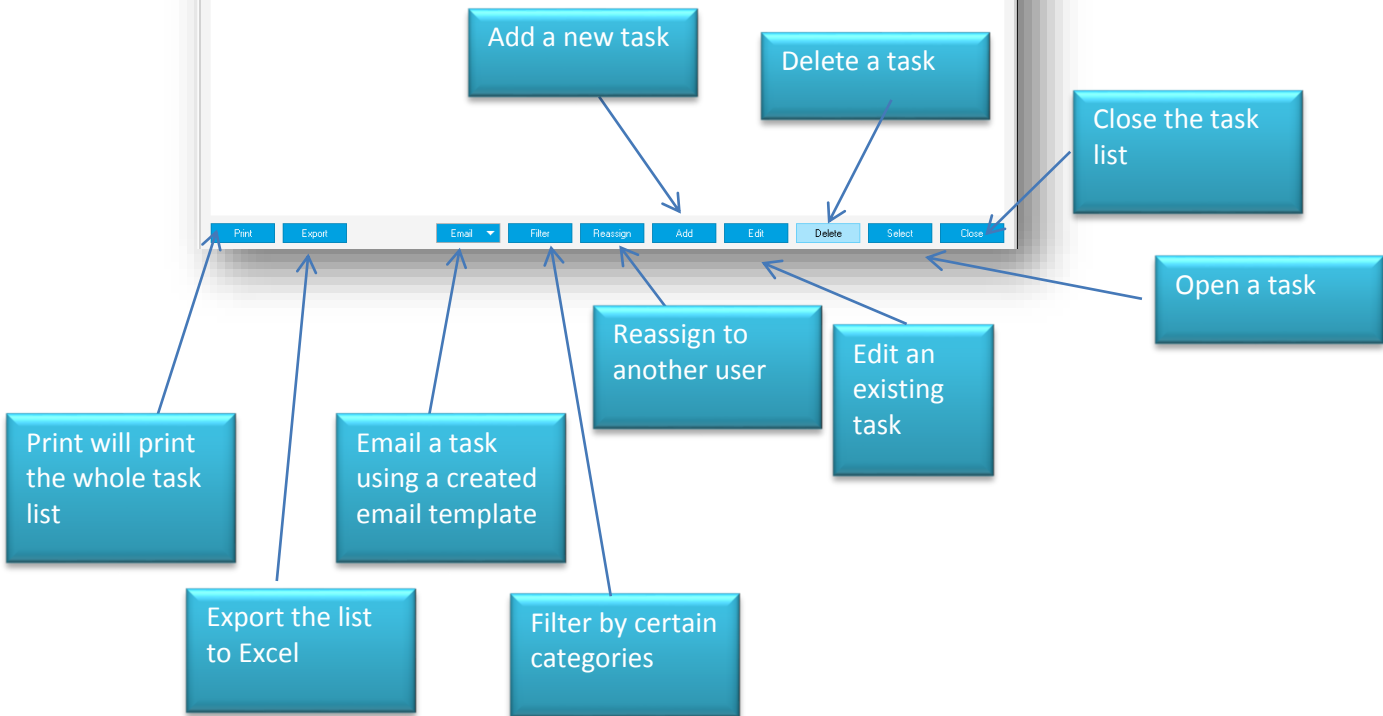
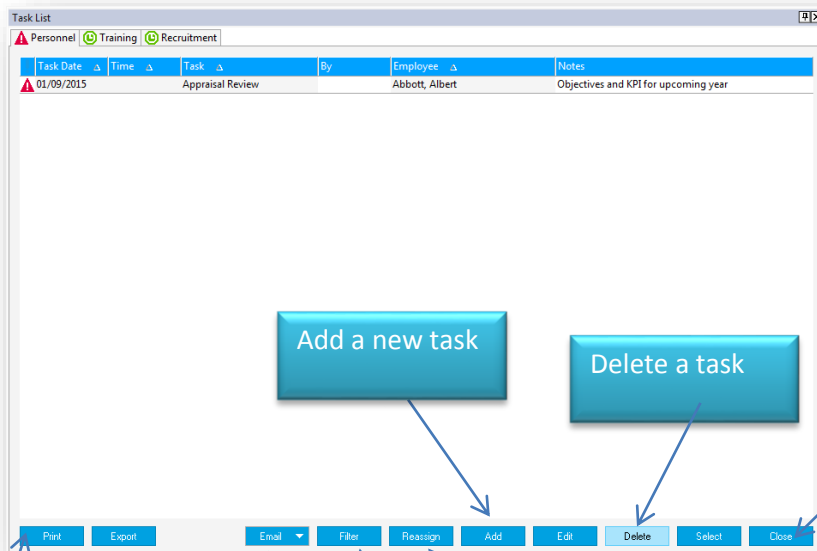
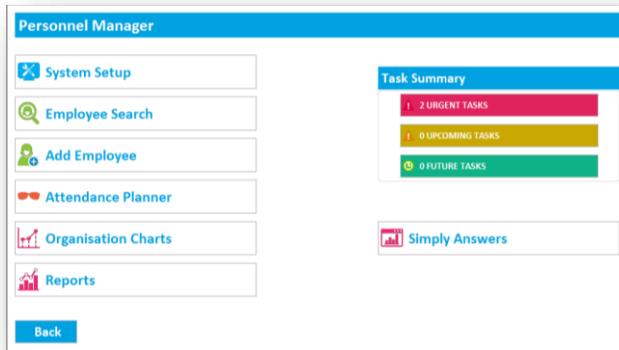
Employee ID	Employee Name	Absence Conflicts With	Date
15	Cooper,Rodger	Holiday	08/09/2015

Print Select Refresh Close

Selecting the conflict will allow the user to amend.

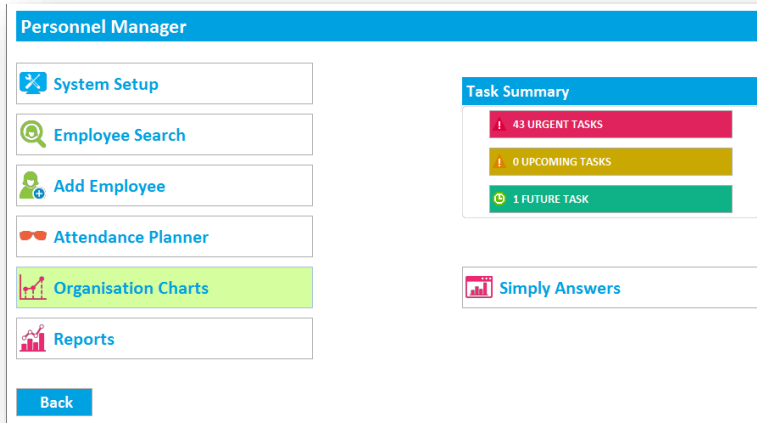
Task List

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

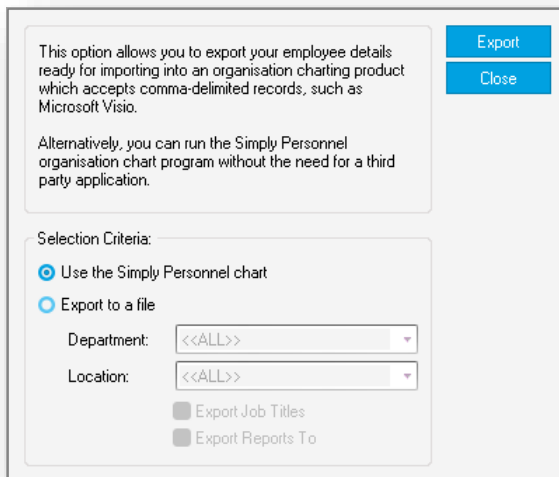


Organisation Chart

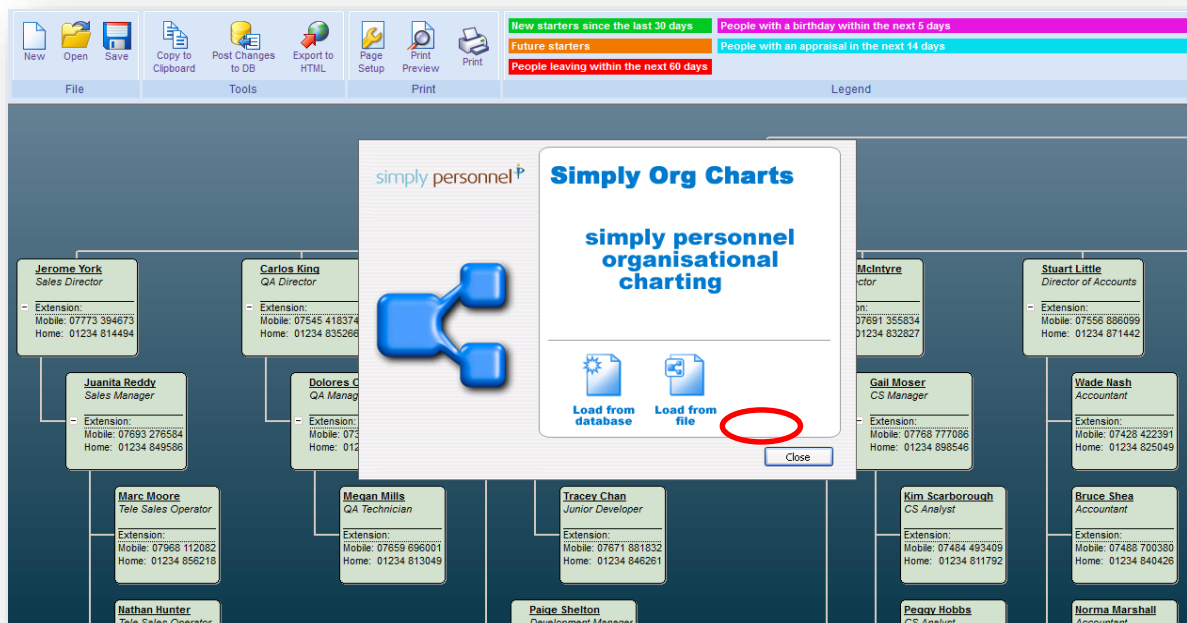
The organisation chart will be built based on reporting lines set within the system.



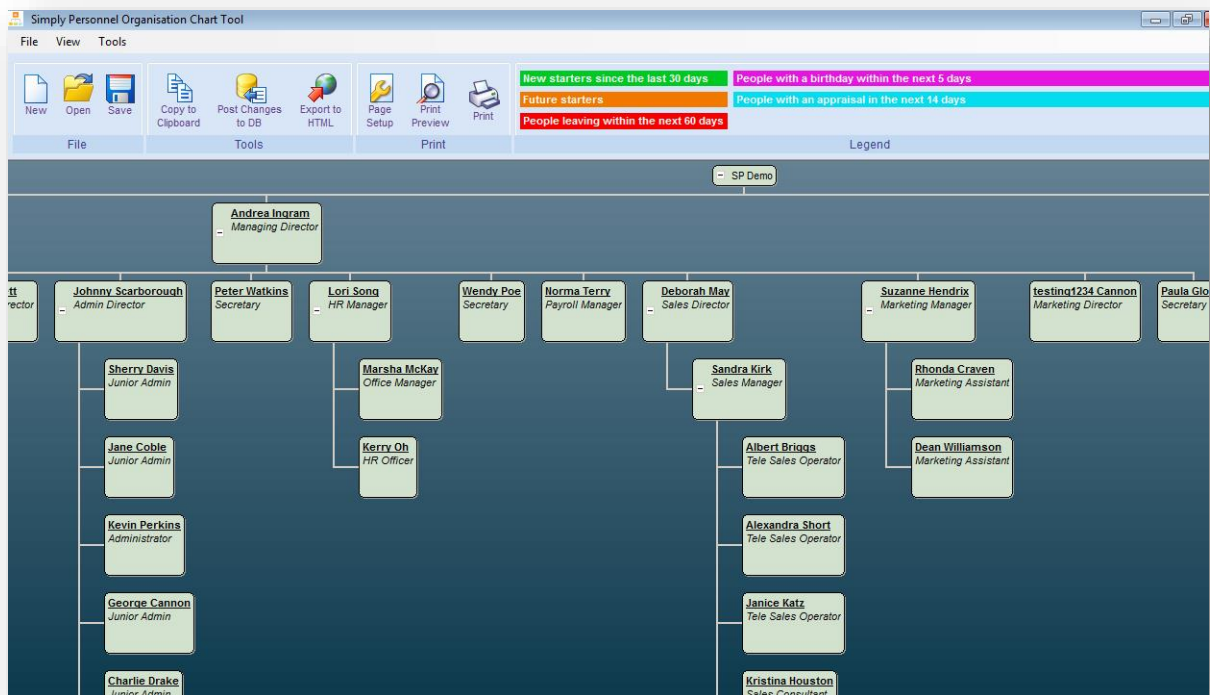
Select Organisation Charts.



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

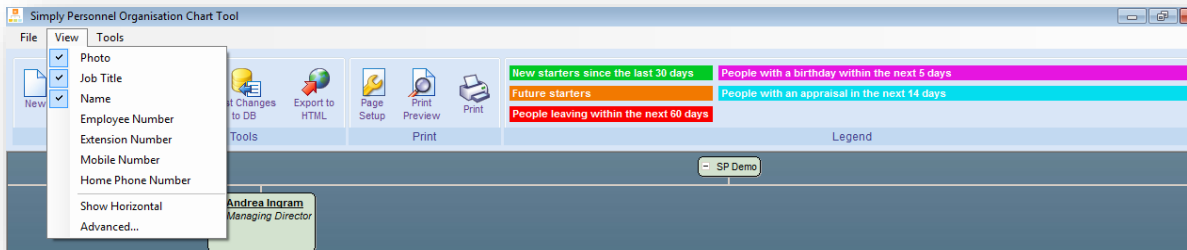


Select either 'Load from database' or Close.

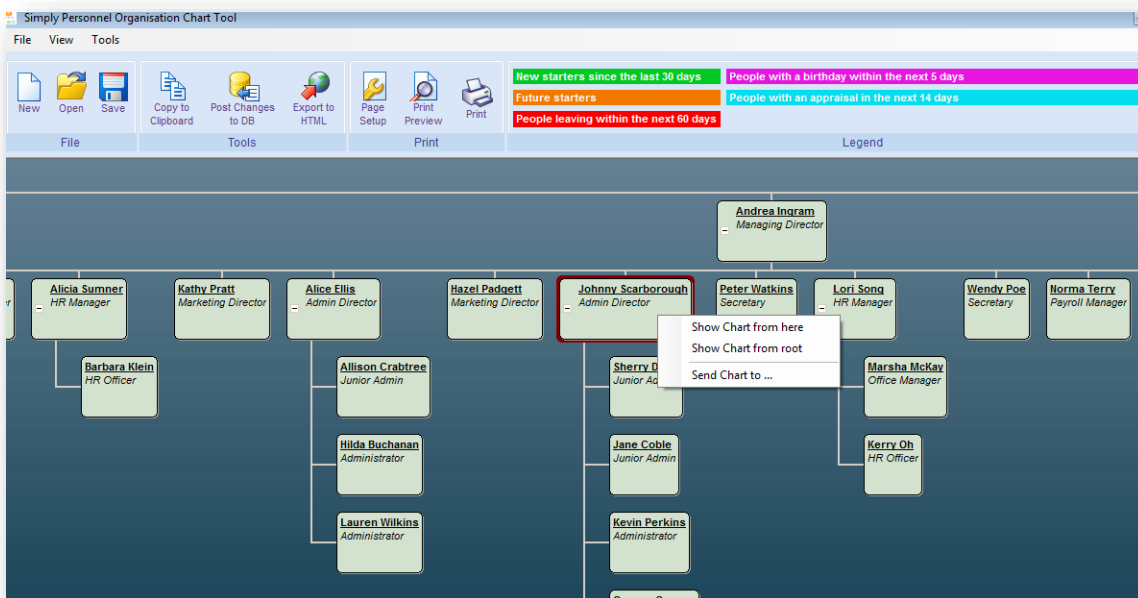


The system will use the legend identified in the toolbar to highlight New Starters, Future Starters, People with a birthday within next 5 days etc.

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

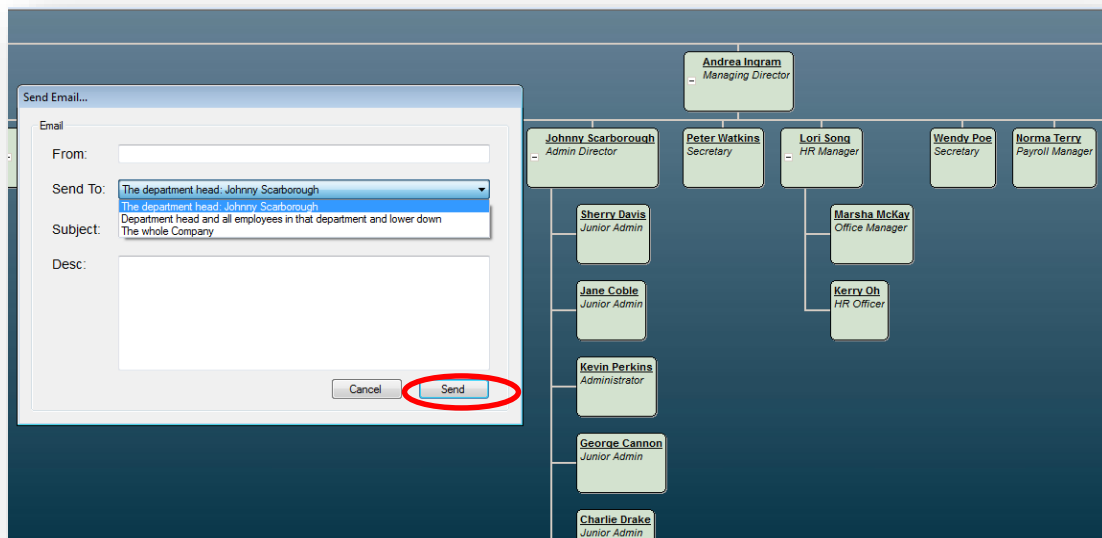


Selecting a section of the chart and then right clicking will display the chart from the highlighted areas.

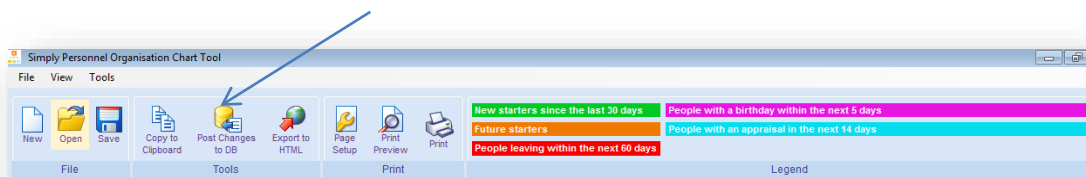


- Select 'Show Chart from here'

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

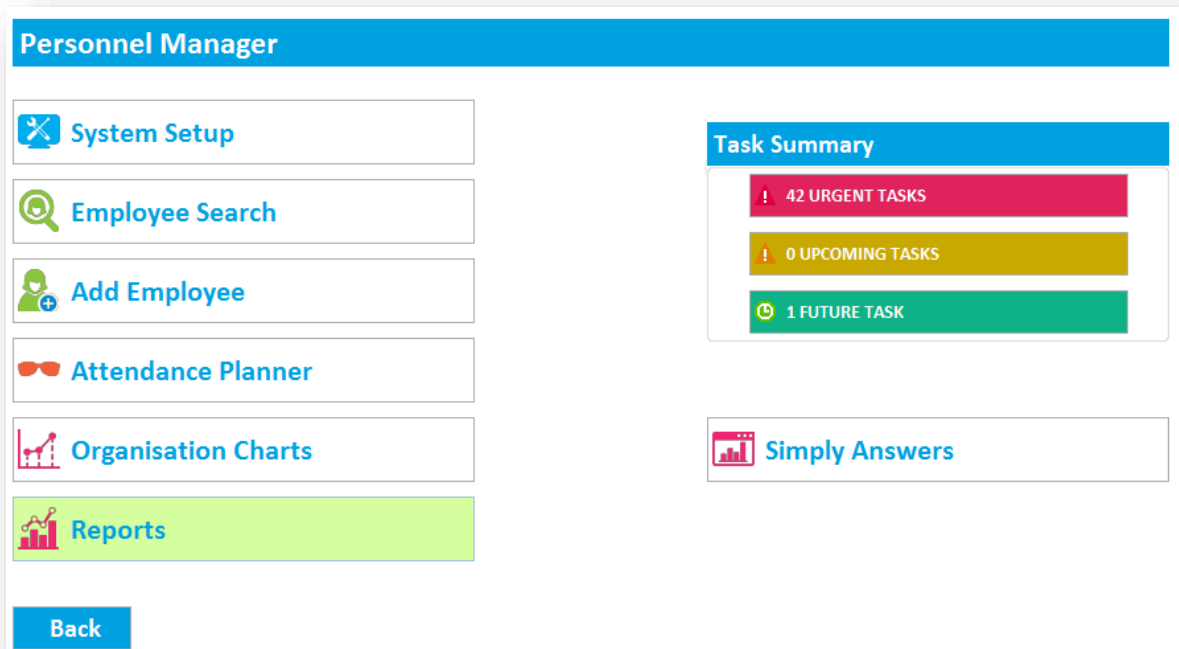


A user can drag and drop employees under different reporting managers to mark this change in the personnel system, from the toolbar select 'Post Changes to DB'.

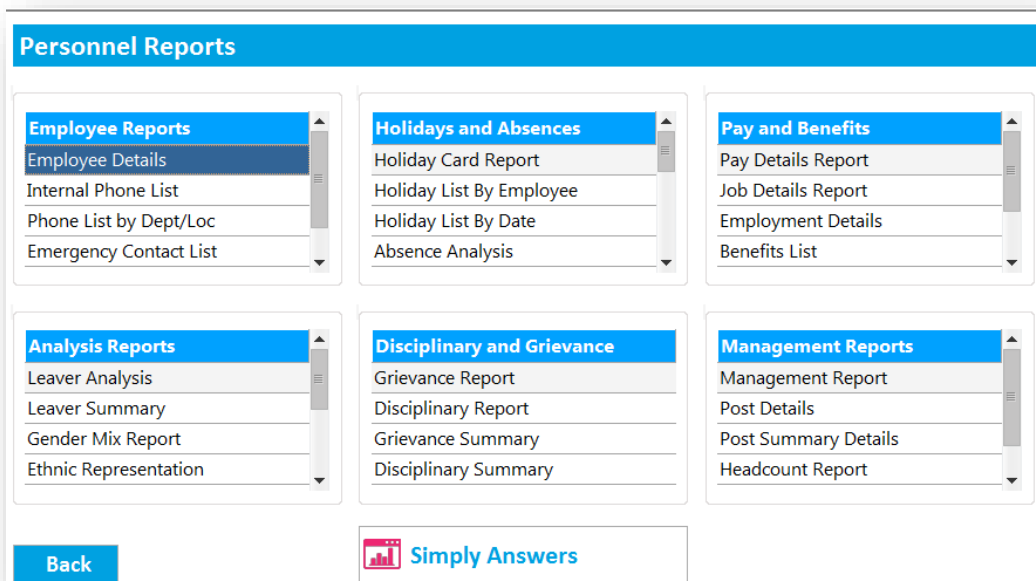


Reports

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.



Select *Reports* from the dashboard.



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

Selection Criteria:

Department: <<ALL>>

Location: <<ALL>>

Start Date: 10/08/2015

End Date: 09/09/2015

Print

Close

Export

Details To Show:

Show all details

Show only:

- Starters and Leavers
- Internal Movements
- Training Courses
- Summary of Employees
- Gender Mix Summary
- Ethnic Representation
- Disabled Representation
- Staff Turnover
- Absenteeism Summary
- Average Salary
- Age Profile
- Ave. Length of Service
- No. of Grievances
- No. of Disciplinarys
- Post
- Post Headcount

Select All

Clear All

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

**Simply Personnel Demo
Management Report**

Department: <<ALL>>
Location: <<ALL>>
Start Date: 10/08/2015
End Date: 09/09/2015
(23 working days)

Starters

Employee Name	Start Date	Post	Department	Location	Salary
Wife, Zahra (43)	20/08/2015				0.00

Total starters: 1

Leavers

Employee Name	Leaving Date	Last Day	Department	Location	Reason
---------------	--------------	----------	------------	----------	--------

Total leavers: 0

Internal Movements

Employee	Adopt/Ascend (1)	Date of Change	New Post
Previous Post: Administrator		20/08/2015	Human Resources Manager
Previous Department: Management			Management
Previous Location: London			London

Training Courses

Start Date	Course Code	Course Description	Duration	CPD Hours
Totals: 0.00 0.00				

Summary of Employees Employed in Period by Employment Type

Employment Type	Number
Underling	41
Full Time	
Total:	42

Gender Mix

Number of Males	% of Males	Number of Females	% of Females
30	71.43	12	28.57

Ethnic Representation

Ethnic Category	Number of Employees	% of Total
<<ALL>>	41	97.62
UK-European	1	2.38

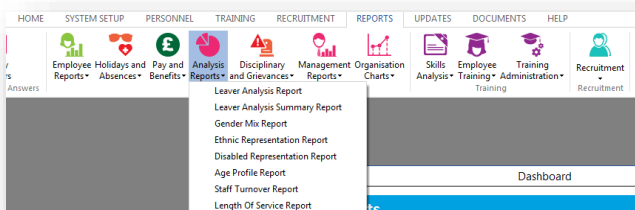
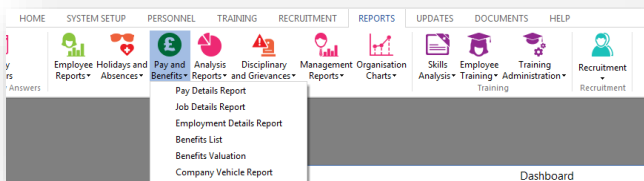
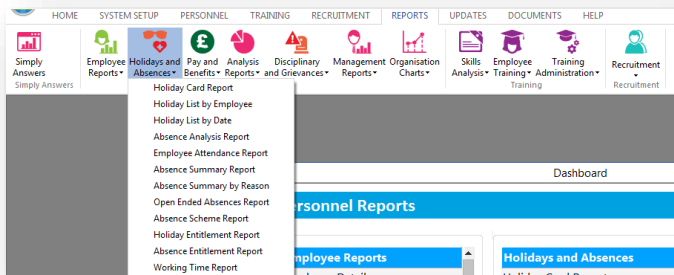
Disabled Representation

Registered Disabled	% of Total
0	0.00

Page 1 of 3

Reports - Toolbar

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

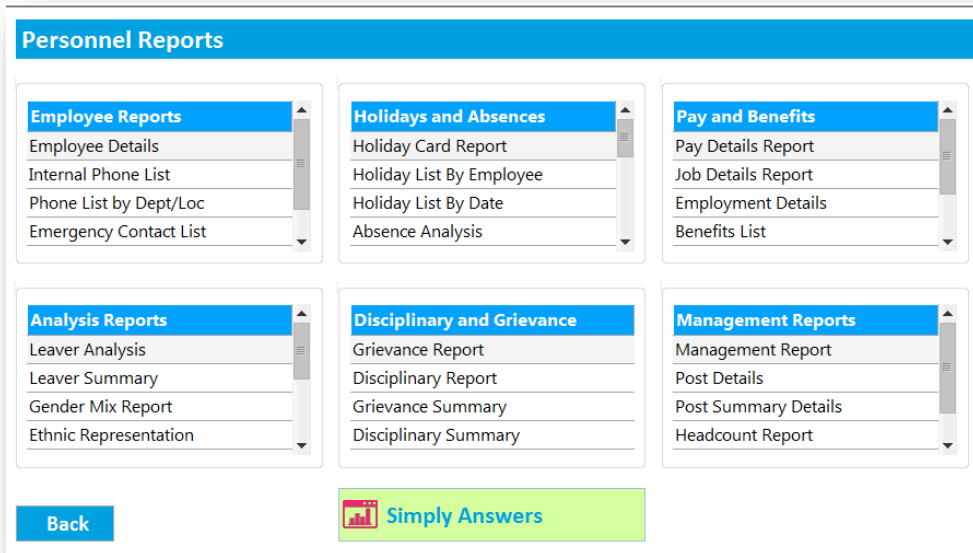


- Select the Category of reports from the toolbar
- Select required report
- Export to MS Excel
- Or select Print

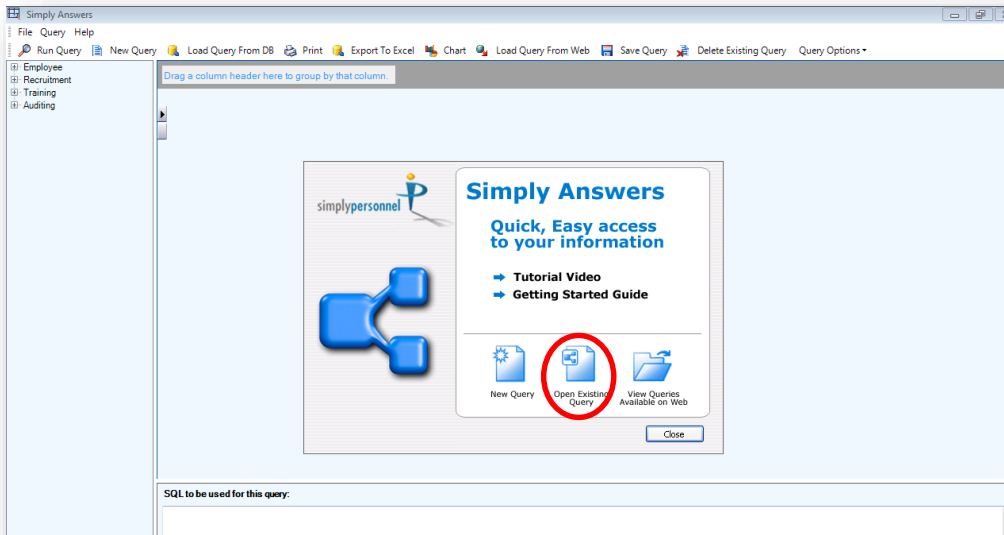
Simply Answers

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.



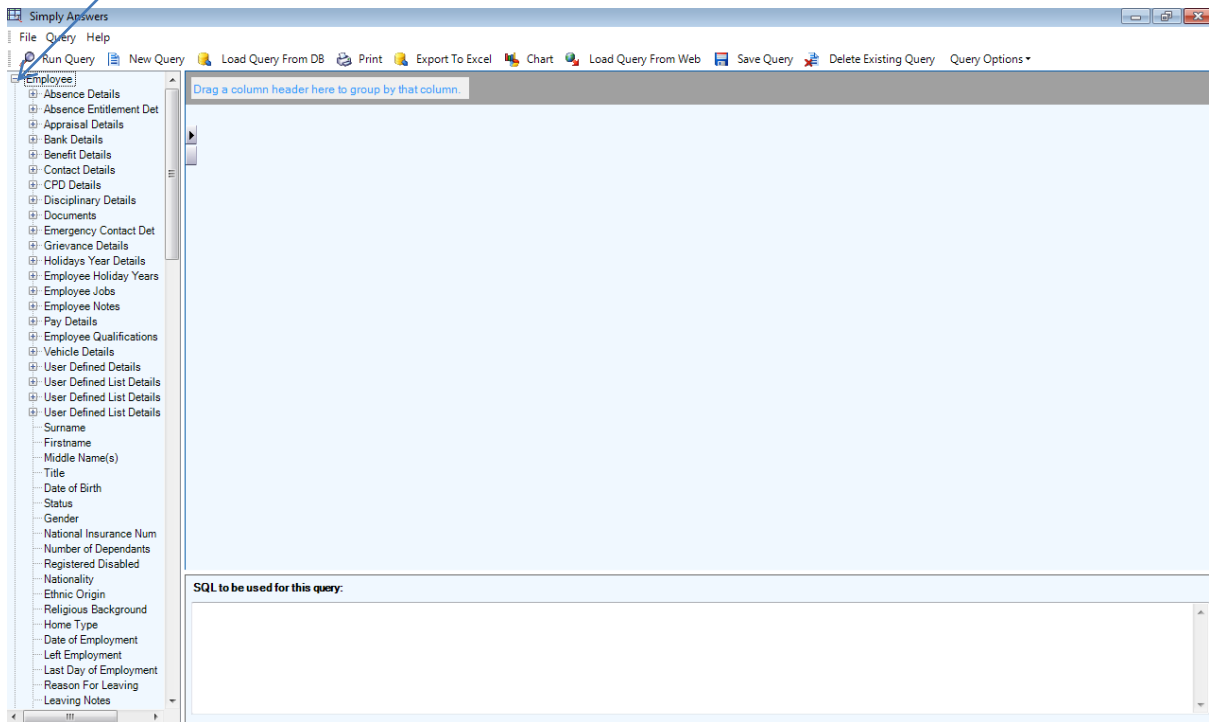
Again the system will open a separate application.



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

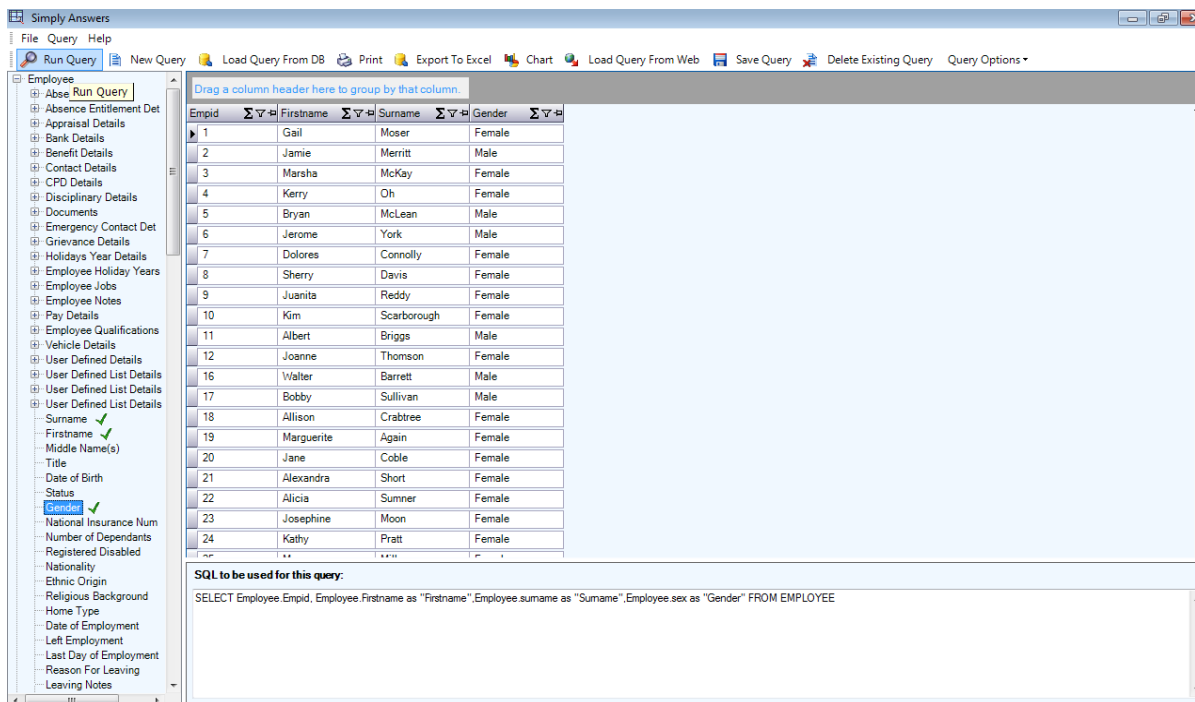
- New Query to begin building
- Close to close the dialog box
- View queries available on the web to open already compiled reports

Expand the employee section to begin selecting the fields

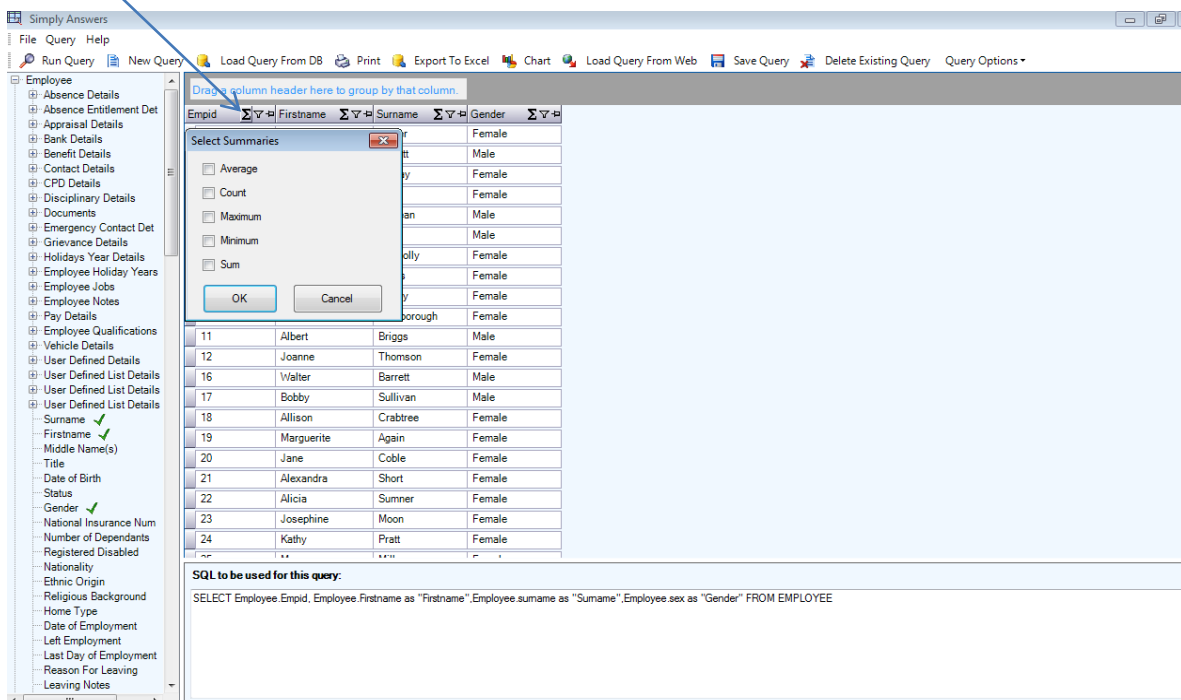


- To include a field within the report simply double click
- The system will place a green tick beside the field to highlight it is included within the report
- From the top toolbar run the query

The system will compile the data in the centre of the screen.



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



Use the funnel to filter the criteria on that column

The screenshot shows the 'Simply Answers' application window. On the left is a tree view of fields, with 'Surname', 'Firstname', and 'Gender' checked. The main area displays a table with columns: Empid, Firstname, Surname, and Gender. A blue arrow points to the funnel icon on the 'Gender' column header. Below the table, the SQL query is displayed: `SELECT Employee.Empid, Employee.Firstname as "Firstname", Employee.surname as "Surname", Employee.sex as "Gender" FROM EMPLOYEE`

Empid	Firstname	Surname	Gender
1	Gail	Moser	(All)
2	Jamie	Merritt	(Custom)
3	Marsha	McKay	(Blanks)
4	Kerry	Oh	(NonBlanks)
5	Bryan	McLean	Female
6	Jerome	York	Male
7	Dolores	Connolly	Female
8	Sherry	Davis	Female
9	Juanita	Reddy	Female
10	Kim	Scarborough	Female
11	Albert	Briggs	Male
12	Joanne	Thomson	Female
16	Walter	Barrett	Male
17	Bobby	Sullivan	Male
18	Allison	Crabtree	Female
19	Marguerite	Again	Female
20	Jane	Coble	Female
21	Alexandra	Short	Female
22	Alicia	Sumner	Female
23	Josephine	Moon	Female
24	Kathy	Pratt	Female

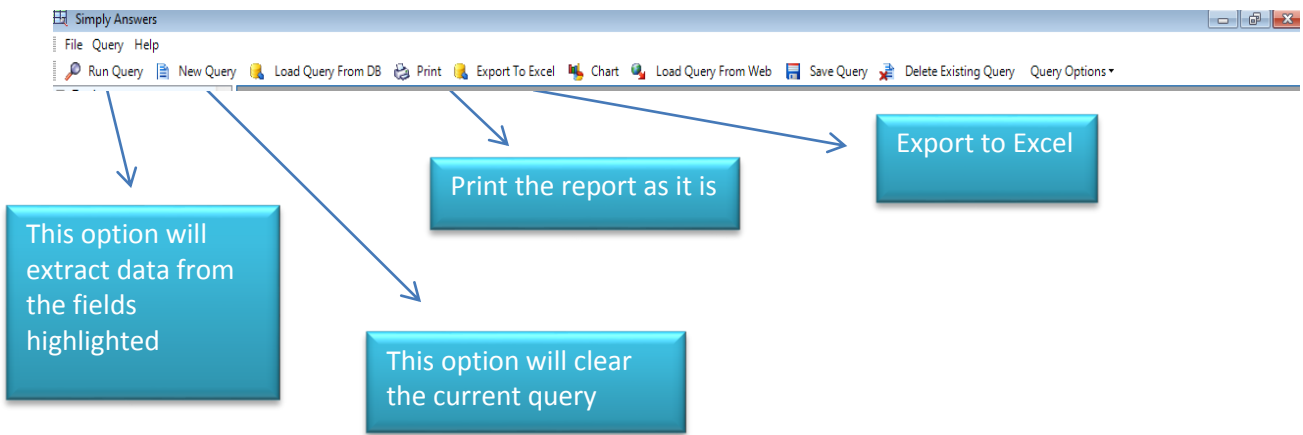
Use the drawing pin to push the column to the front of the report.

The screenshot shows the same 'Simply Answers' application window. A blue arrow points to the drawing pin icon on the 'Firstname' column header. The table columns are now ordered: Firstname, Empid, Surname, and Gender. The SQL query remains the same: `SELECT Employee.Empid, Employee.Firstname as "Firstname", Employee.surname as "Surname", Employee.sex as "Gender" FROM EMPLOYEE`

Firstname	Empid	Surname	Gender
Gail	1	Moser	Female
Jamie	2	Merritt	Male
Marsha	3	McKay	Female
Kerry	4	Oh	Female
Bryan	5	McLean	Male
Jerome	6	York	Male
Dolores	7	Connolly	Female
Sherry	8	Davis	Female
Juanita	9	Reddy	Female
Kim	10	Scarborough	Female
Albert	11	Briggs	Male
Joanne	12	Thomson	Female
Walter	16	Barrett	Male
Bobby	17	Sullivan	Male
Allison	18	Crabtree	Female
Marguerite	19	Again	Female
Jane	20	Coble	Female
Alexandra	21	Short	Female
Alicia	22	Sumner	Female
Josephine	23	Moon	Female
Kathy	24	Pratt	Female

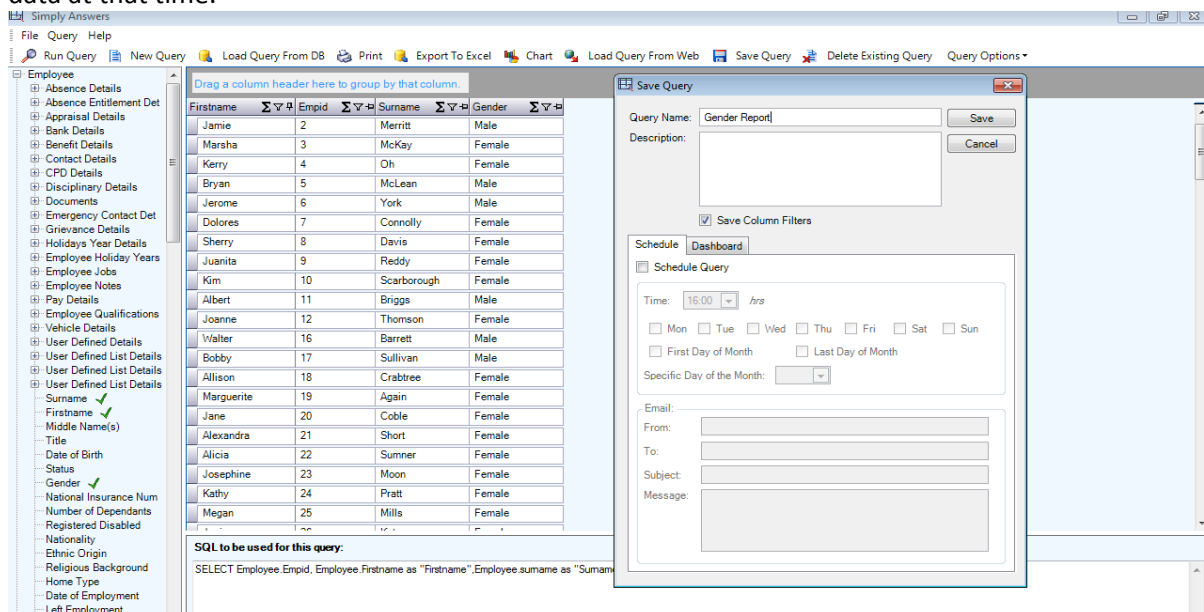
Drag the column headers to group by the specific header.

SIMPLY ANSWERS – TOOLBAR

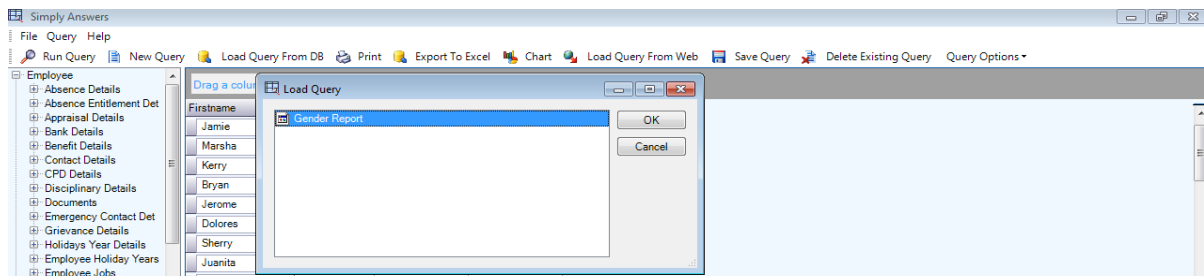


SAVING QUERIES

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



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



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

The screenshot shows the 'Simply Answers' application window. On the left is a tree view of data categories, with 'Surname', 'Firstname', and 'Middle Name(s)' selected. The main area displays a table of employee data:

Firstname	Empid	Surname	Gender
Jamie	2	Merritt	Male
Marsha	3	McKay	Female
Kerry	4	Oh	Female
Bryan	5	McLean	Male
Jerome	6	York	Male
Dolores	7	Connolly	Female
Sherry	8	Davis	Female
Juanita	9	Reddy	Female
Kim	10	Scarborough	Female
Albert	11	Briggs	Male
Joanne	12	Thomson	Female
Walter	16	Barrett	Male
Bobby	17	Sullivan	Male
Allison	18	Crabtree	Female
Marguerite	19	Again	Female
Jane	20	Coble	Female
Alexandra	21	Short	Female
Alicia	22	Summer	Female
Josephine	23	Moon	Female
Kathy	24	Pratt	Female
Megan	25	Mills	Female

Below the table, the 'SQL to be used for this query:' section shows the following query:

```
SELECT Employee.Empid, Employee.Firstname as "Firstname", Employee.surname as "Surname", Employee.sex as "Gender" FROM EMPLOYEE
```

The 'Query Options' dropdown menu is open, showing the following options:

- Include All Leavers
- Include Future Leavers
- Exclude Leavers
- Use Inner Join
- Use Left Join
- Show 'Reports To' Name
- Show 'Reports To' ID
- Show Job History
- Show Salary History

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.

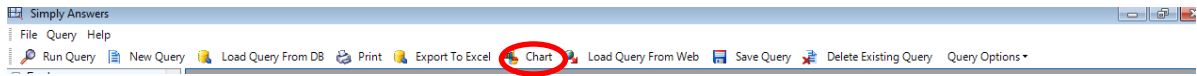
The screenshot shows the 'Simply Answers' application window. On the left is a tree view of data categories, with 'Employee' selected. The main area displays a table of employee data with columns for Firstname, Empid, Surname, and Gender. Below the table is a SQL query: `SELECT Employee.Empid, Employee.Firstname as "Firstname", Employee.surname as "Surname"`. A 'Save Query' dialog box is open on the right, with the following fields and options:

- Query Name: Gender Breakdown
- Description: (empty)
- Save Column Filters
- Schedule: Dashboard
- Schedule Query
- Time: 16:00 hrs
- Days: Mon Tue Wed Thu Fri Sat Sun
- First Day of Month Last Day of Month
- Specific Day of the Month: (dropdown menu)
- Email: From: (text input), To: (text input), Subject: (text input), Message: (text area)

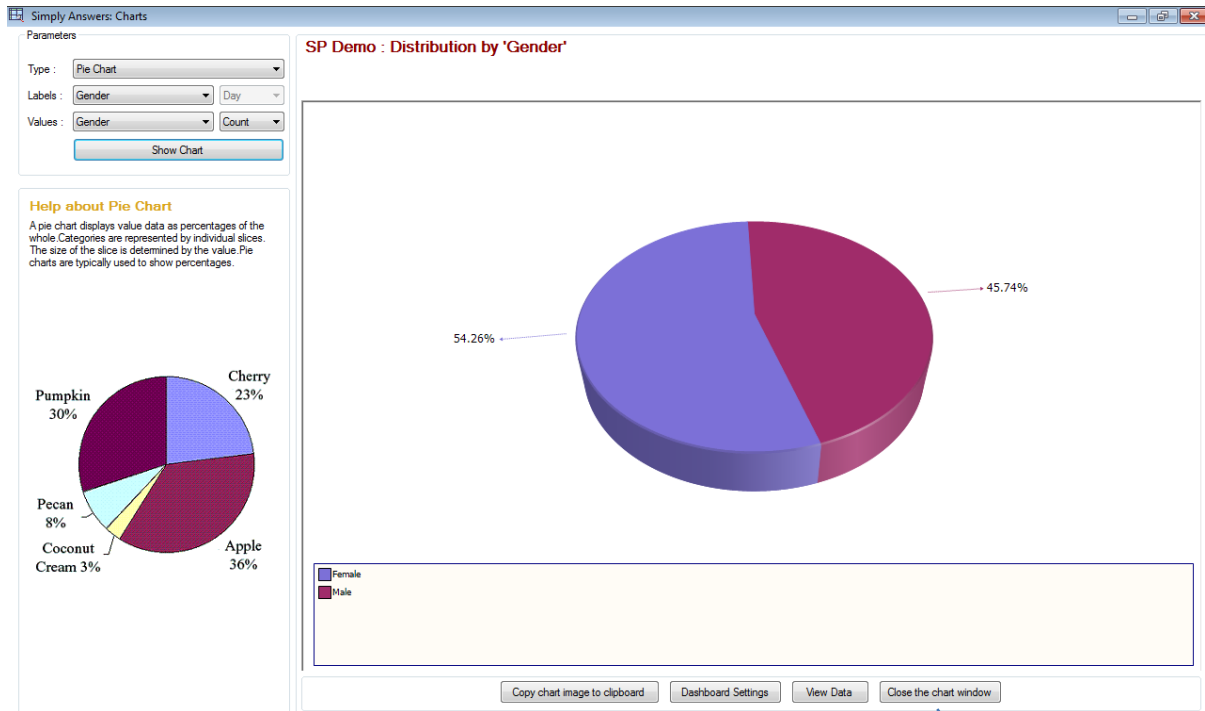
- Select Save query
- Provide the report with a name
- Check the box to 'schedule the query'
- Select the day
- Enter the recipient email address
- Save

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.



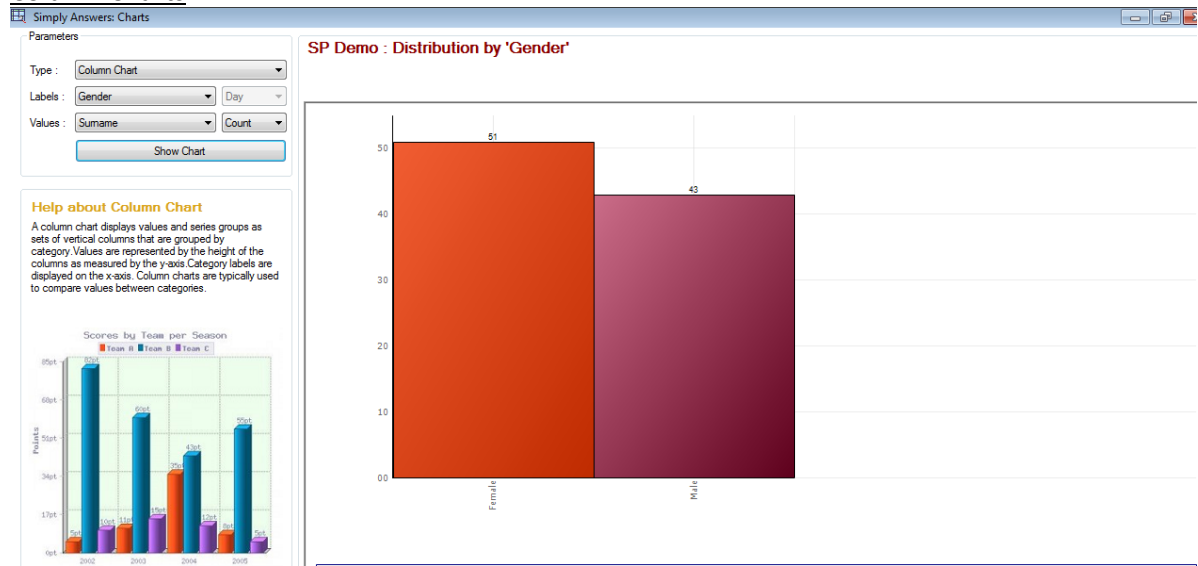
- Determine the value and label
- Select show chart



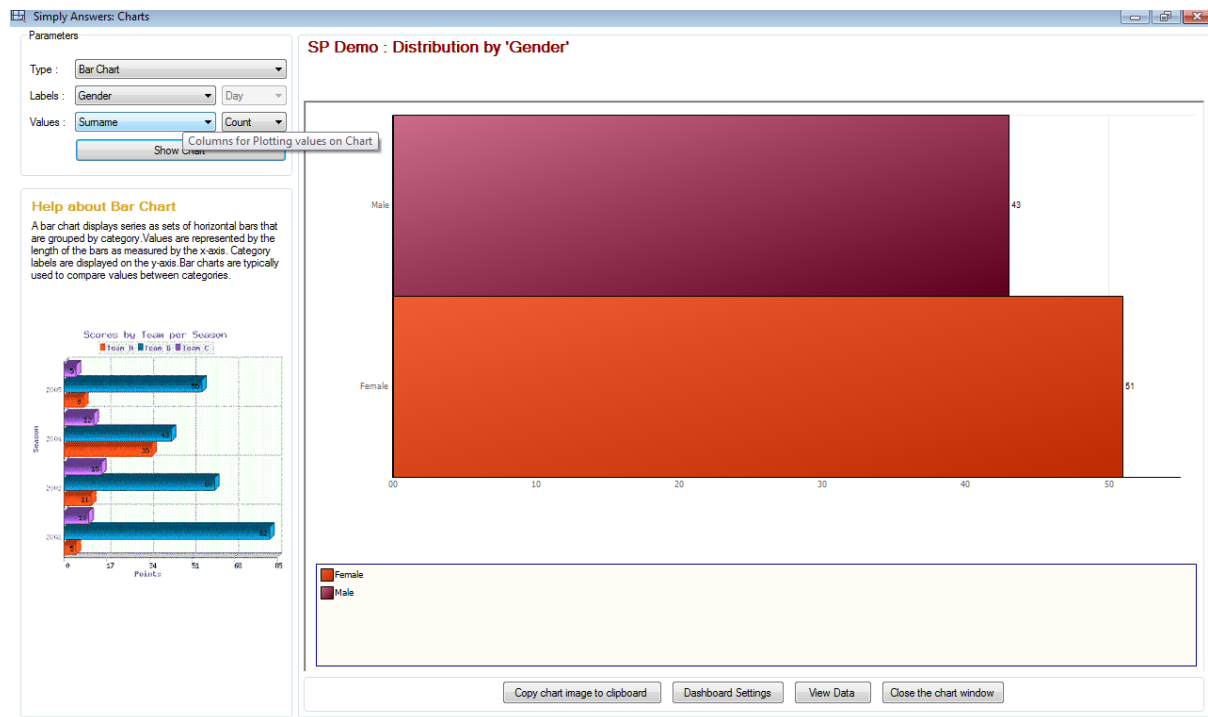
Users can also copy the chart image to the clipboard allowing them to paste into a document.

Types of charts available are;

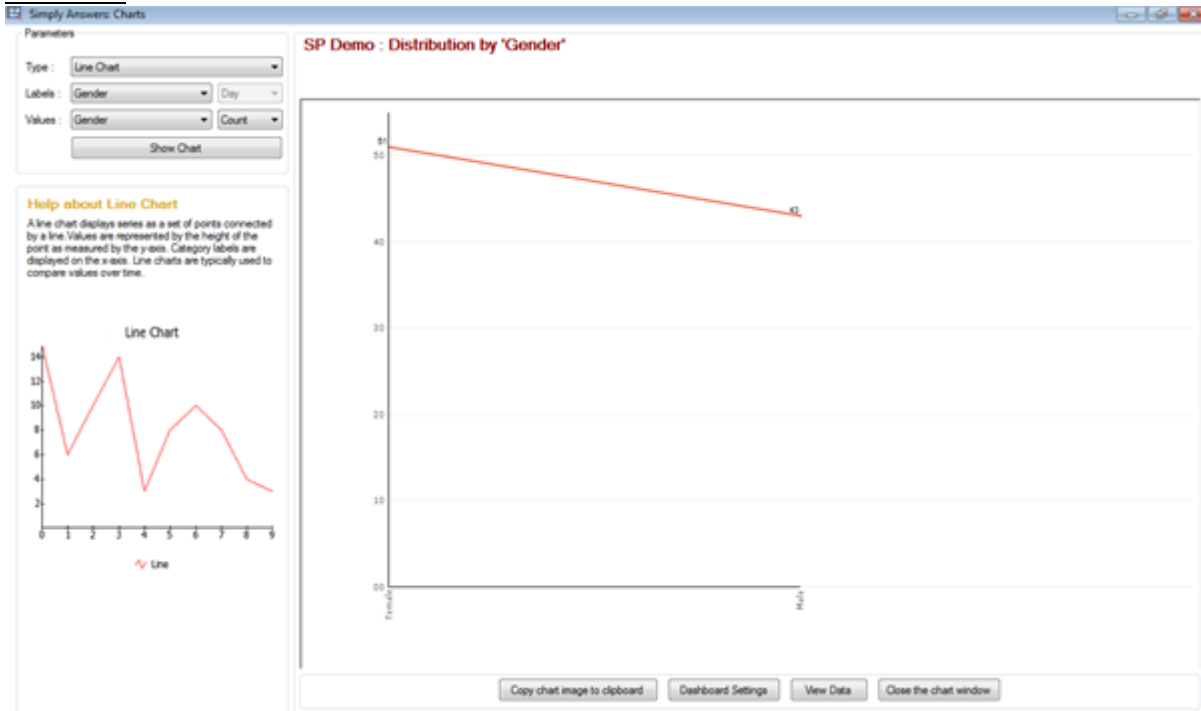
Column Charts



Bar Charts



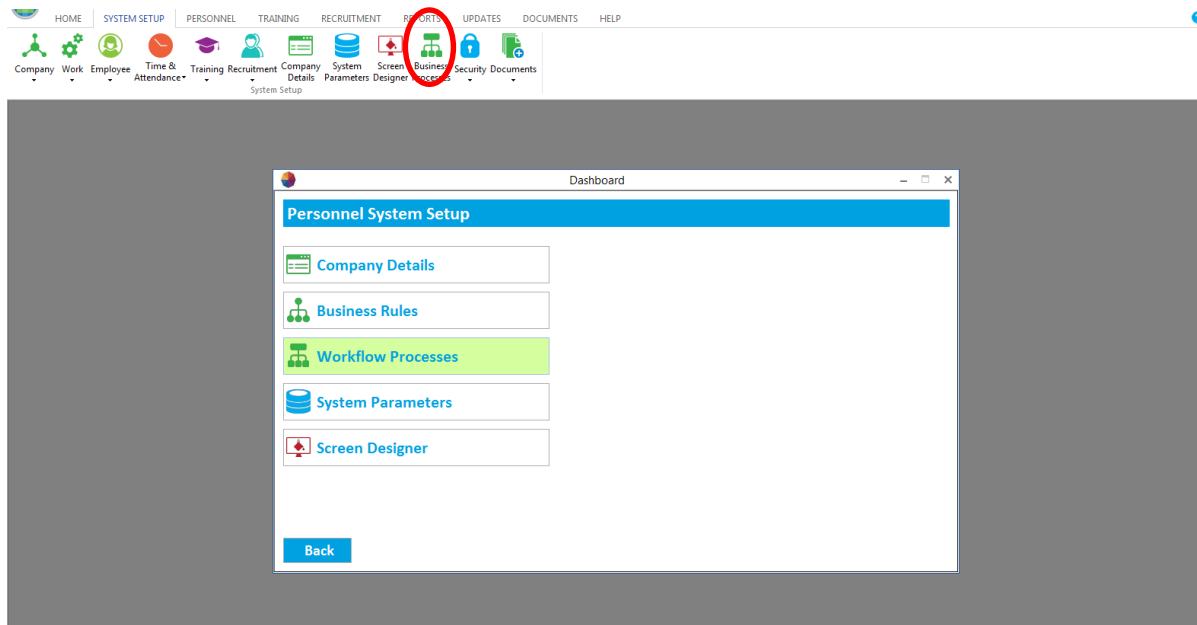
Line Chart



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 clicking on the Business Processes tab from within an employee's record.



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.

The screenshot displays a user interface for managing processes. On the left, a sidebar identifies the user as Albert Abbott, Human Resources Manager, with various menu options like Personal, Work, Attendance, Training / Qualifications, Docs / Contracts, and Other. The main area shows a window titled 'Processes - New Starter (1 - Albert Abbott)' containing a table of tasks:

Task	Description
<input type="checkbox"/> Collect mandatory information	Information: Collect all the mandatory information, such as start date, notice period, entitlements
<input type="checkbox"/> See proof of ID	Information: See, copy and file proof of ID or right to work
<input type="checkbox"/> Issue contract	Information: Issue contract of employment and disciplinary and grievance procedure

On the right side of the interface, there is a 'URGENT TASKS' section and a list of HR tools: Employment Calculator, Book Holiday, Record Absence, Attendance Record, Holiday Card, Save, and Cancel.

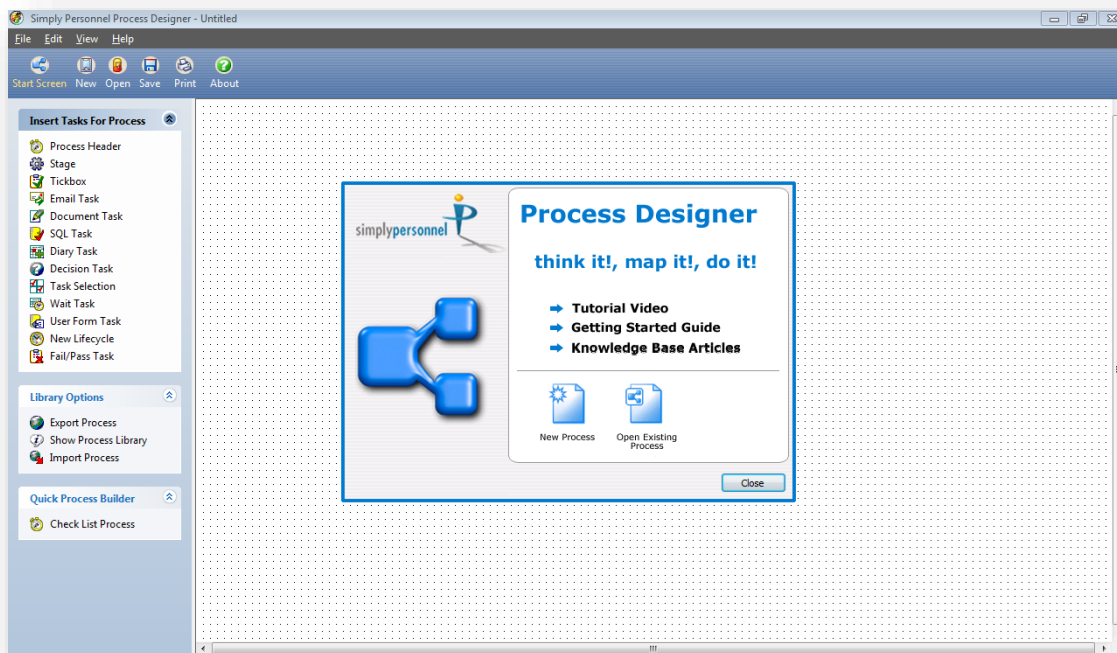


When an existing process is modified within the process designer it will not change any active or archived processes against an employee, the changed process will only take affect the next time a process is started for an employee.

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.

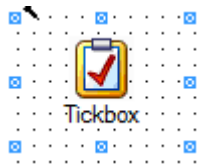
BUILDING A WORK FLOW PROCESS

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:

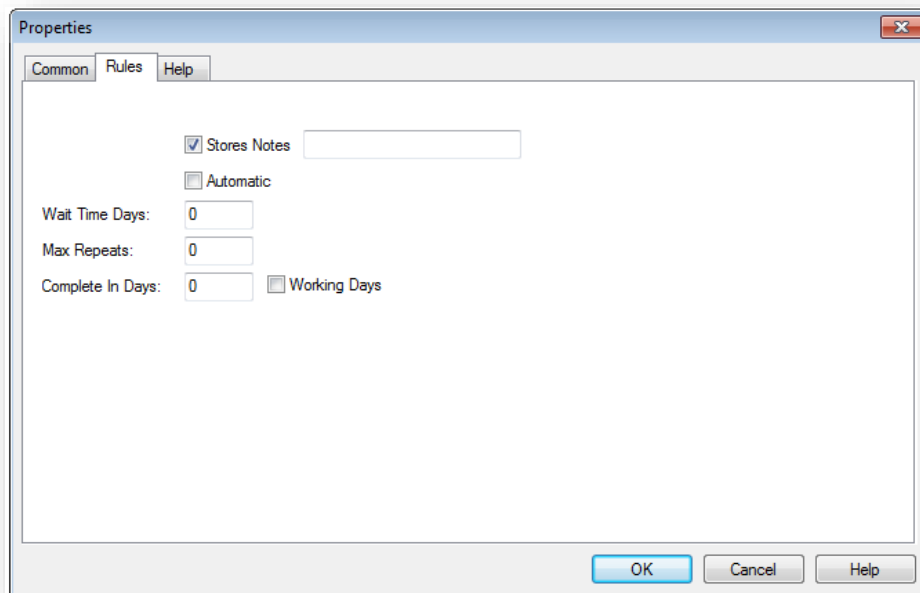
- Description this will be what appears within the tasks list

A screenshot of a 'Properties' dialog box. The dialog has three tabs: 'Common', 'Rules', and 'Help'. The 'Common' tab is selected. Inside the dialog, there are several fields:

- 'Description:': A text area containing the word 'Tickbox'.
- '*Task Type:': A dropdown menu showing 'USERTASK'. To its right is the text '*LINKTRUE/LINKFALSE'.
- 'Key (For Ordering Your Task)': An empty text box.
- 'Tooltip:': A text box containing 'Tickbox'.
- 'User Data:': A text box containing '0'.

At the bottom of the dialog are three buttons: 'OK', 'Cancel', and 'Help'.

RULES



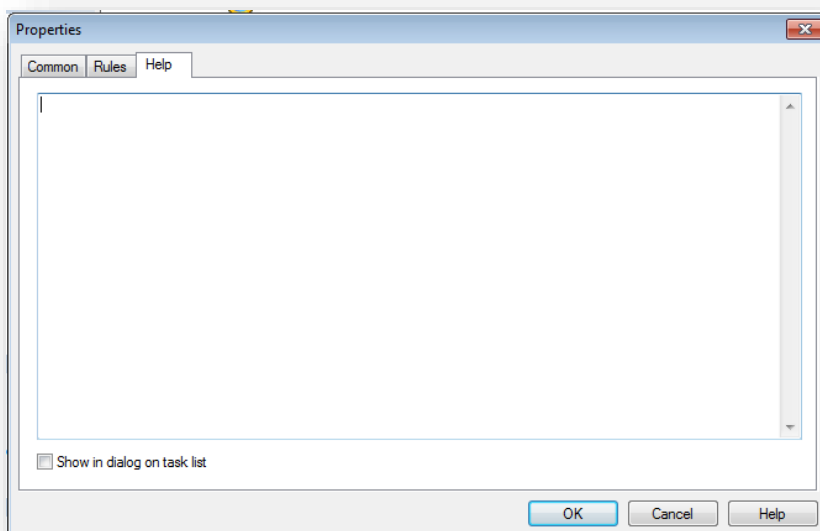
The screenshot shows a 'Properties' dialog box with three tabs: 'Common', 'Rules', and 'Help'. The 'Rules' tab is selected. It contains the following controls:

- Stores Notes [text input field]
- Automatic
- Wait Time Days: [0] [text input field]
- Max Repeats: [0] [text input field]
- Complete In Days: [0] [text input field] Working Days

At the bottom right, there are three buttons: 'OK', 'Cancel', and '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.

HELP



The screenshot shows the same 'Properties' dialog box with the 'Rules' tab selected. The main area is a large text input field for entering a help message. At the bottom left of this area, there is a checkbox labeled 'Show in dialog on task list'. At the bottom right, there are three buttons: 'OK', 'Cancel', and 'Help'.

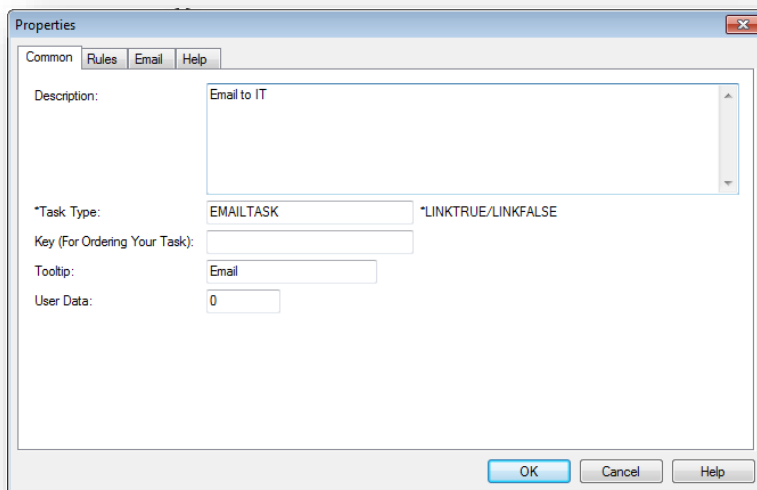
The message entered here will show on the task list screen to aid the users performing the tasks.

EMAIL TASK

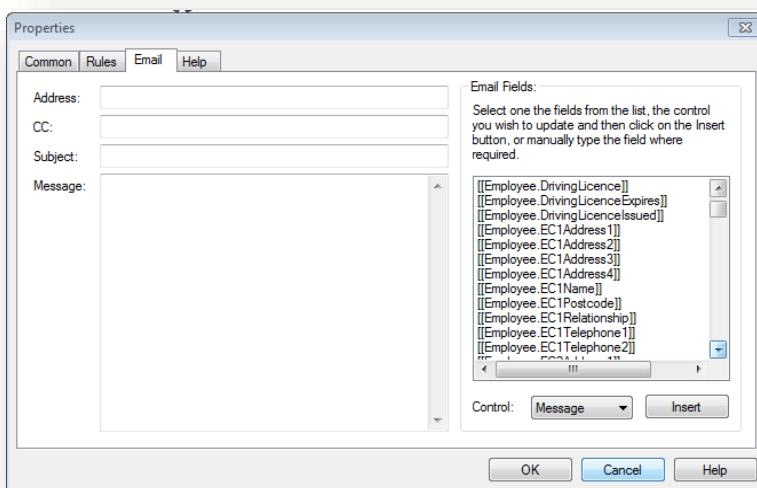
The Email task provides a convenient way of sending an email from within the tasks list. Once the previous task is complete MS Outlook will open a window containing pre-determined wording.



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



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

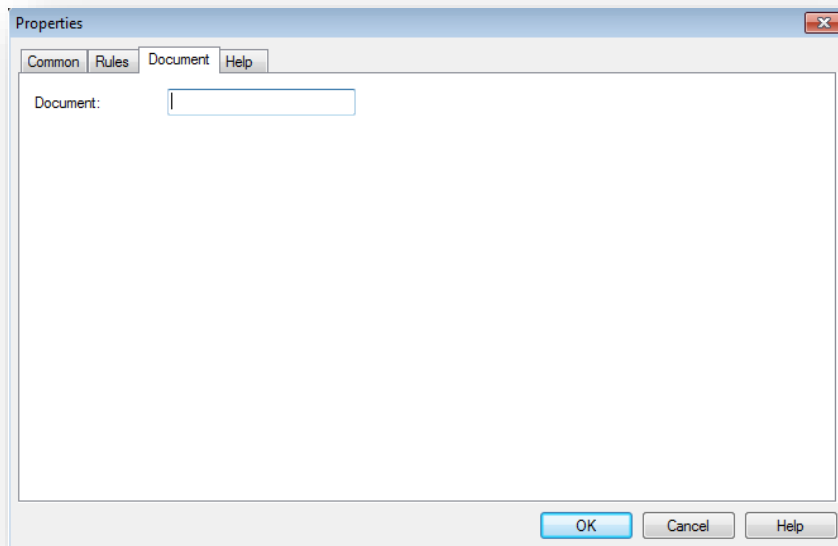


DOCUMENT TASK

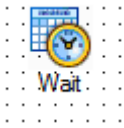


The Document task allows a user to specify a document to be mail merged or inserted as it will take the user to the Document tab of the employee record.

- 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.



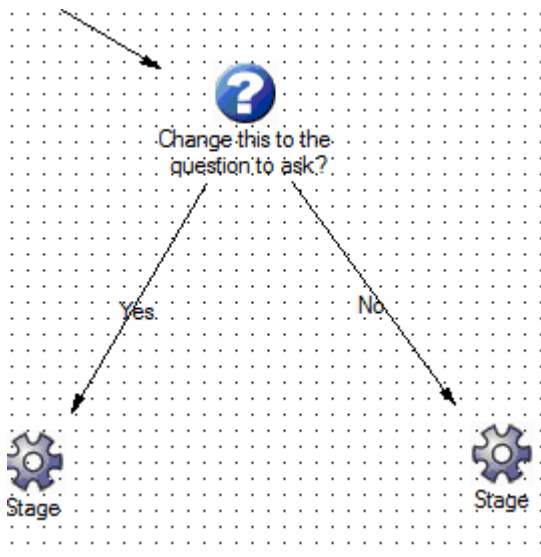
WAIT TASK



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

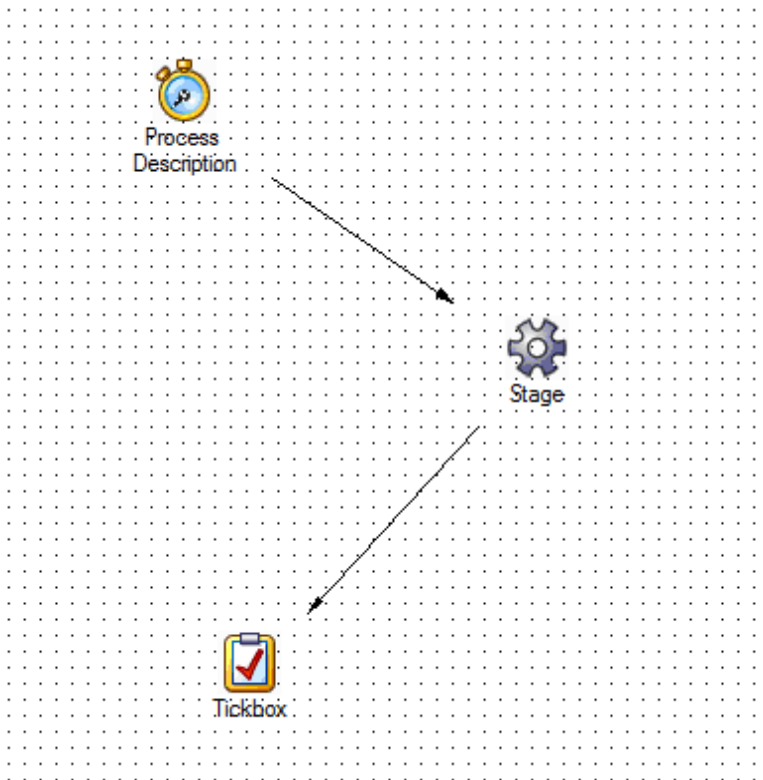
It is not necessary to use a Wait task unless it is required for the process to go down two different routes based on the wait expiry occurring, it is suggested that the Complete in Days option is used on a User Task to achieve a wait that will trigger the traffic light system within Simply Personnel.

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.

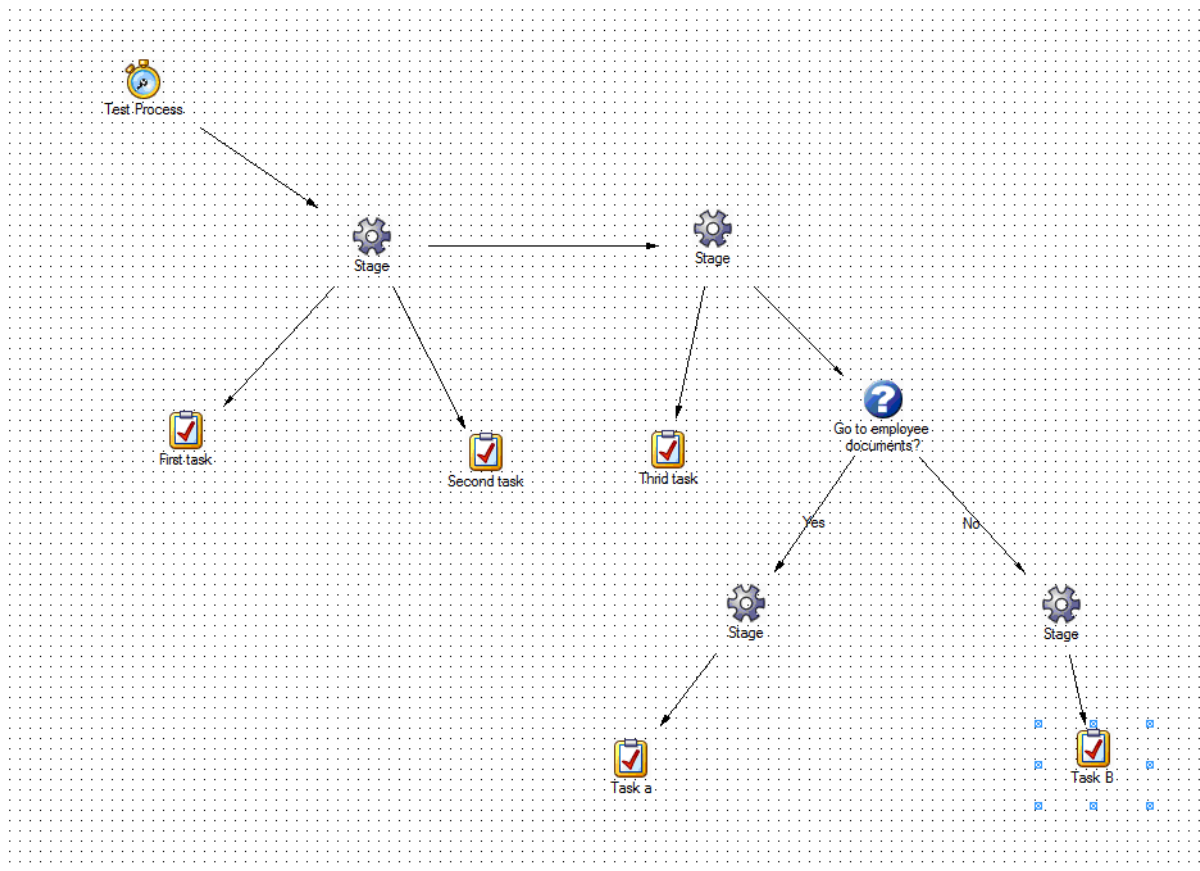
PROCESS DESCRIPTION

The screenshot shows a 'Properties' dialog box with three tabs: 'Process Schedule Details', 'Common', and 'Rules'. The 'Common' tab is active. The dialog contains the following fields:

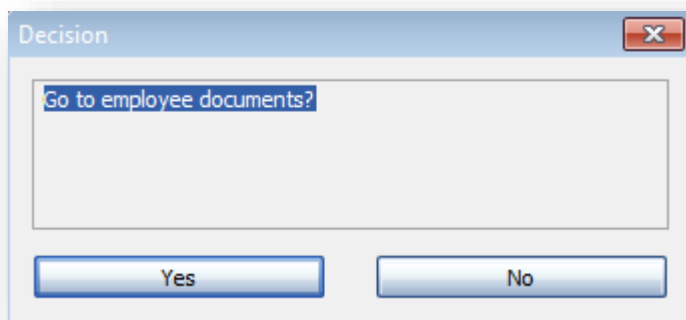
- Description: Test Process
- *Task Type: PROCESSTART
- *LINKTRUE/LINKFALSE
- Key (For Ordering Your Task):
- Tooltip: Process start
- User Data: 0

At the bottom of the dialog are 'OK', 'Cancel', and 'Help' buttons. In the background, the 'Process Description' and 'Tickbox' icons are visible, with arrows pointing from the 'Process Description' icon to the 'Properties' dialog and from the 'Tickbox' icon to the 'Common' tab.

DECISION TASK



This will then prompt the user for an answer.



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.

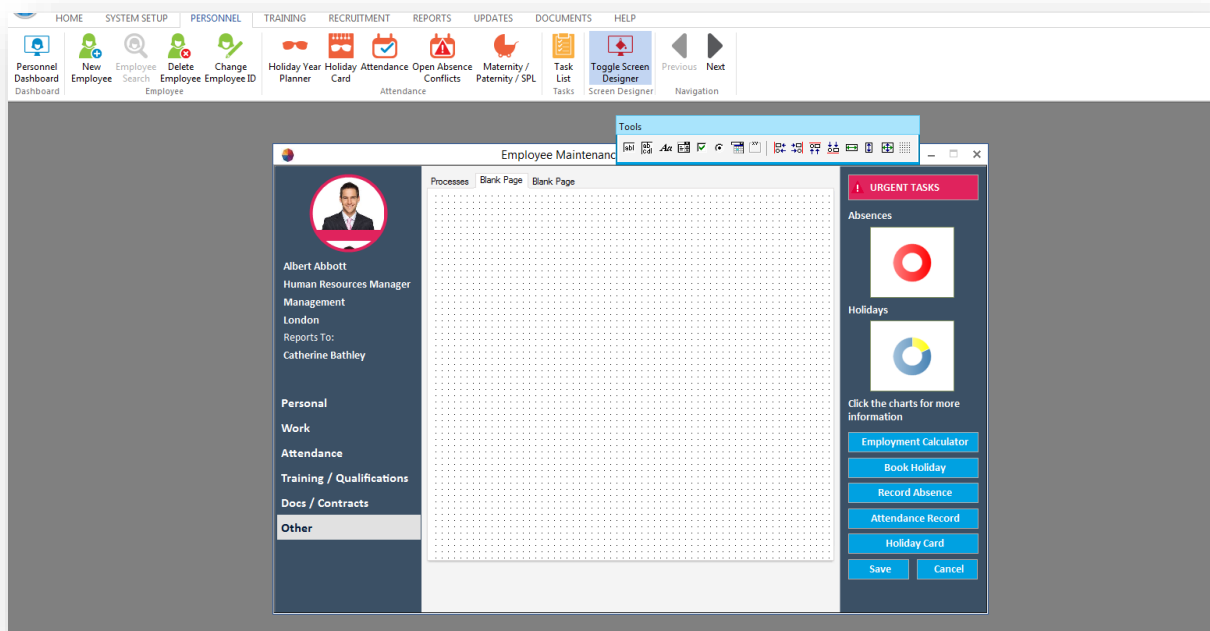
There are 2 blank tabs (labelled blank page) this can be used to store additional details specific to the businesses requirements.

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

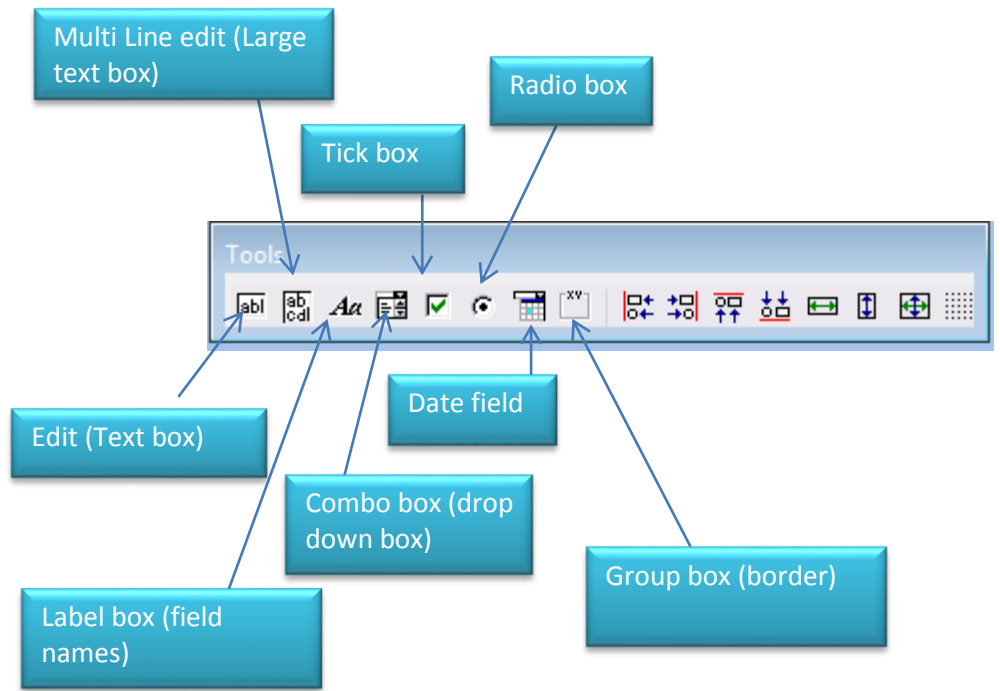
- New fields can be added
- Existing fields that a user does not want can be hidden
- Existing fields can be renamed.
- Fields can have their background and text colours changed to highlight them
- This is where a user can tailor the system to the exact needs of the organisation

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

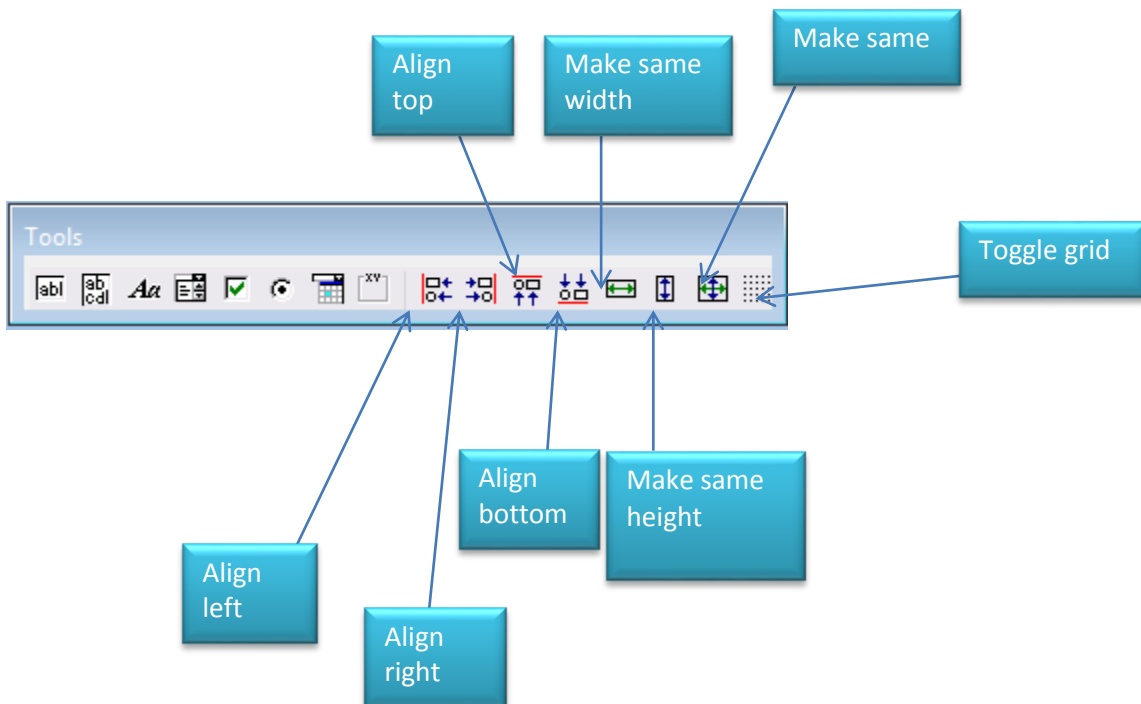
To enter screen designing mode select Toggle Screen Designer to enter grid mode to begin designing.



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 allow 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 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

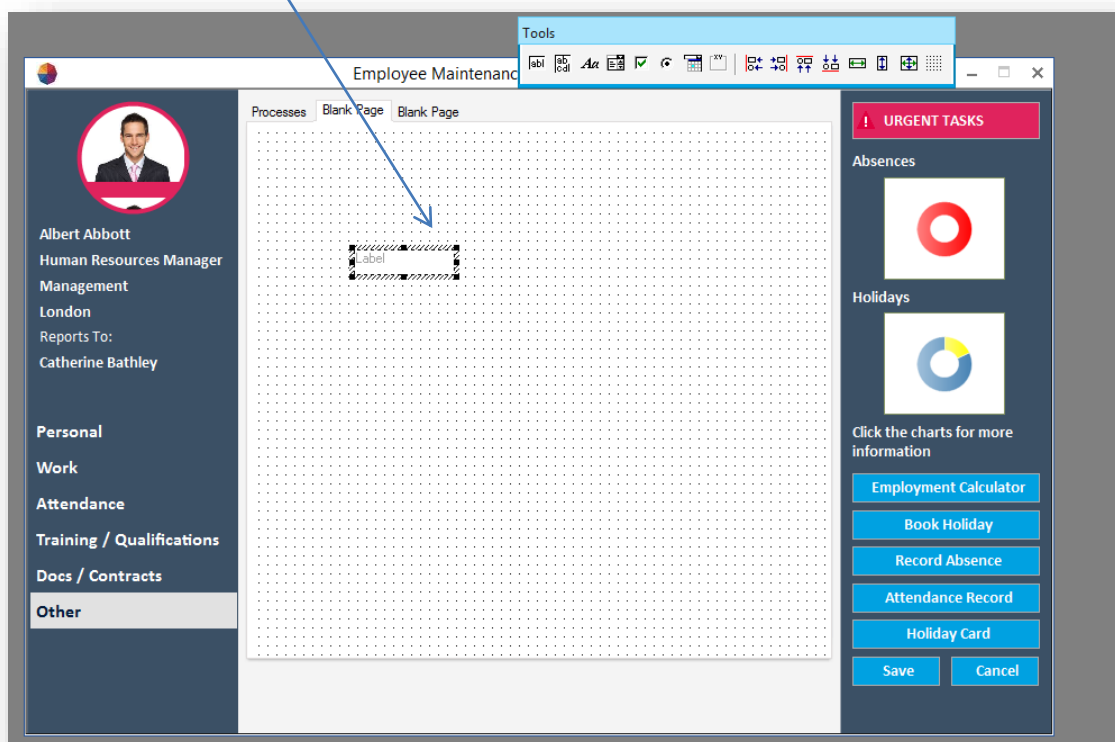
To move a control

- Left click
- Drag to new position

RESIZING A CONTROL

Select the control

To resize place over the pointers



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

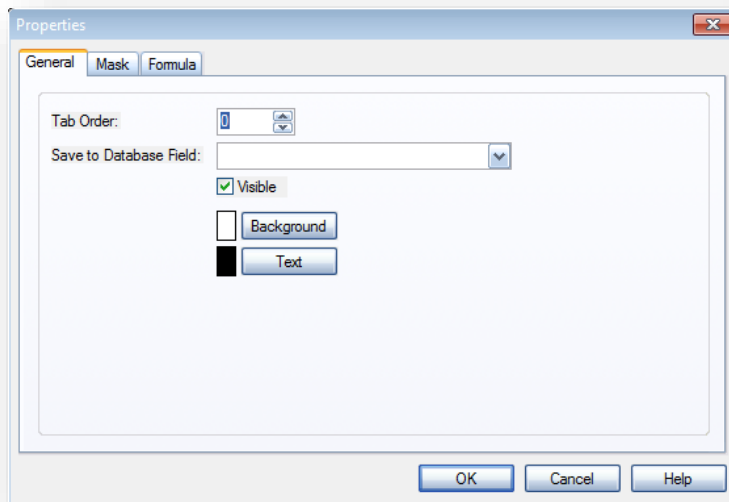
Select all the other controls to be resized (do this by holding down the Ctrl key and left clicking on them). The first control selected will be the one that the other controls will be resized to match. Now left click on the Make Same Width, Make Same Height or Make Same Size buttons on the toolbar and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



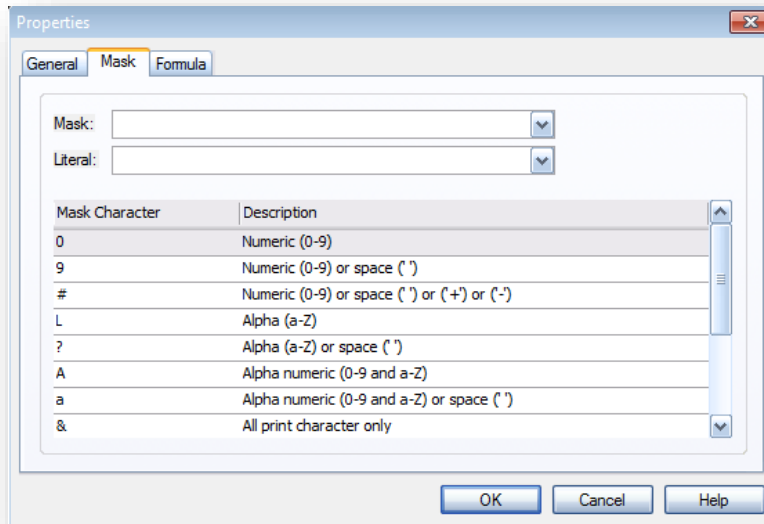
Do not link the same database field to more than one control as this could result in the data in the first control getting replaced by the data within the second. Every control must have its own database field.

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)



Edit controls can have 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.

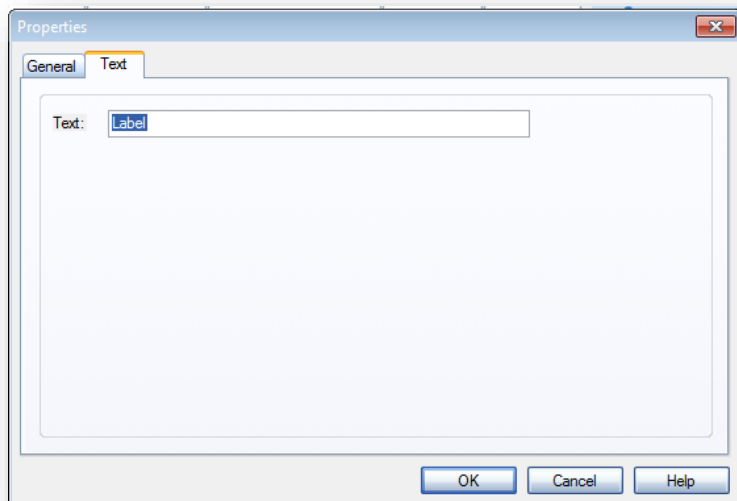


When the user adds a mask to an edit control, in order for the mask to be applied they will be required to exit the Screen Designer and close the window, e.g. Employee Maintenance screen, and reopen it.

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)
H	Hex digit (0-9 and A-F)
X	Hex digit (0-9 and A-F) and space (' ')

Label Control

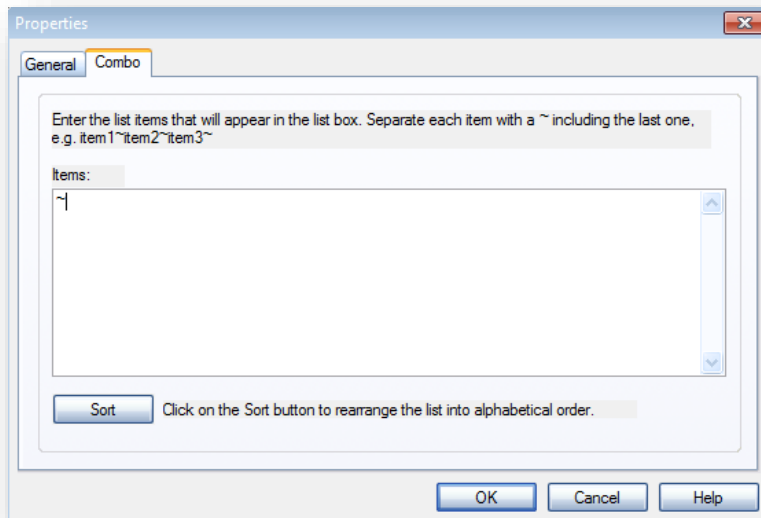
Right click to view Label control screen.



- Complete the name within the text box
- Click OK

Drop-down box

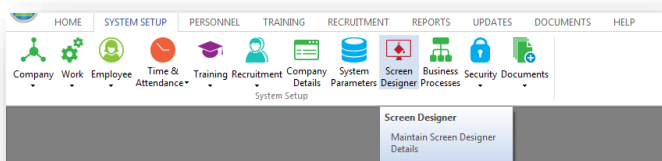
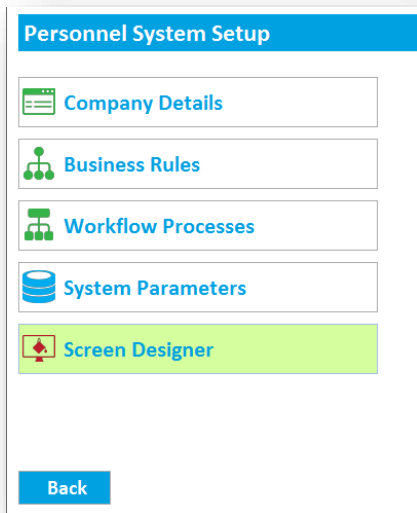
- To create entries within the combo box
- Left click
- Right click
- Select the combo tab



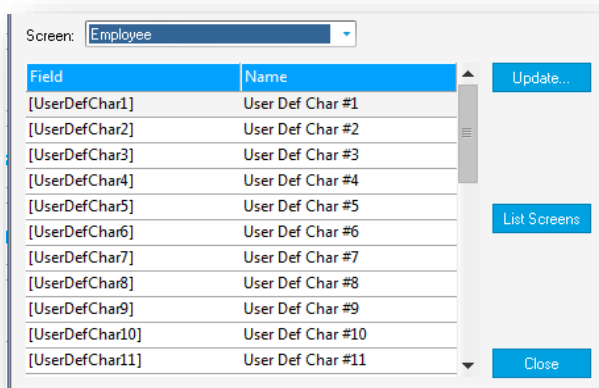
- Select ~ then type the first item followed by ~
- Repeat this ensuring a ~ is placed at the end of the last item

RENAMING THE DATABASE FIELD

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



The following screen will appear.



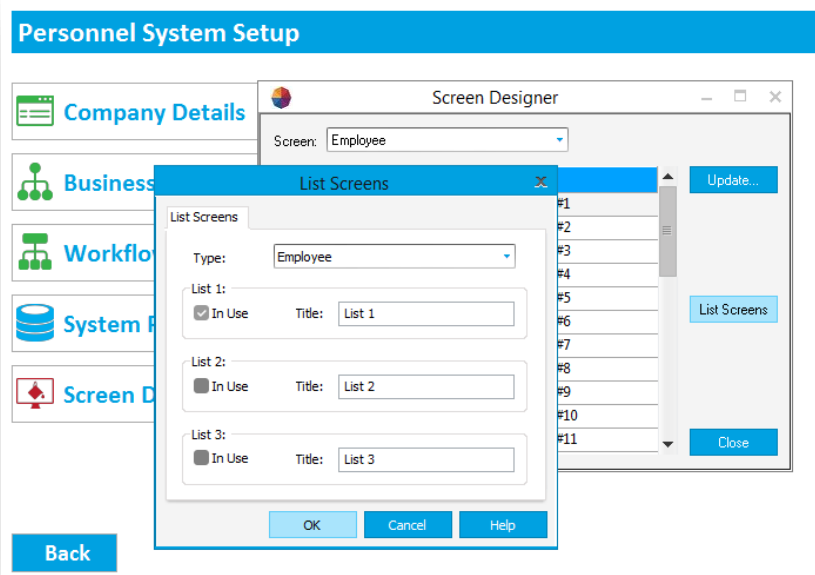
- Select the relevant screen and field
- Select update (double click)
- User will then have the option to rename the field to something more relevant



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

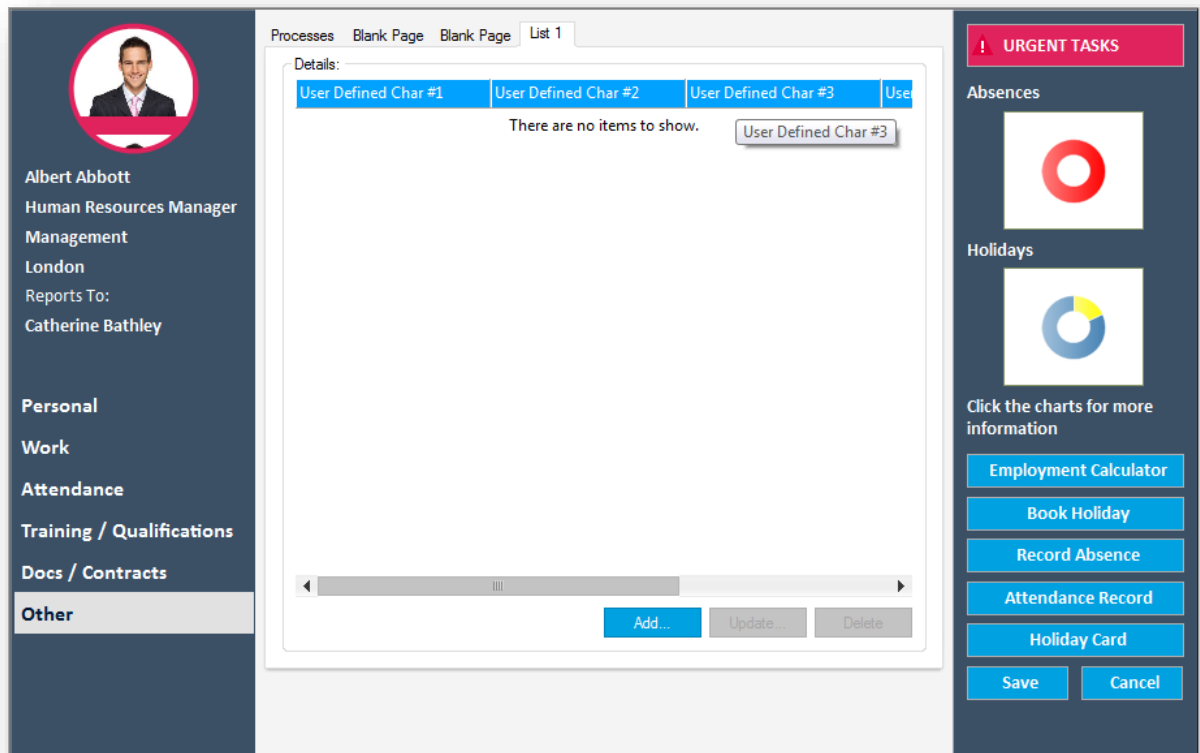
Three Employee screens have been added to Employee Maintenance area, these screens allows users to create their own list/history screen similar to job history list. These screens first need to be enabled using the Screen Designer.



- 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.

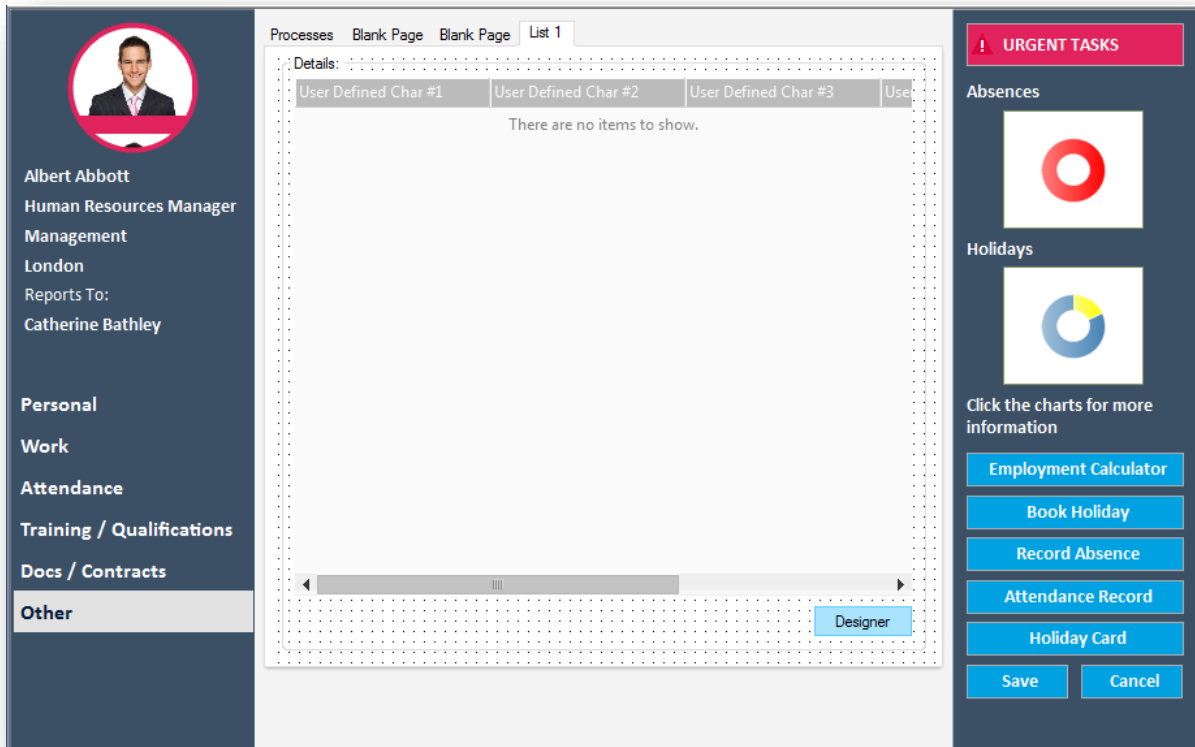
The Add, Update, Delete buttons work the same as the other list screens except the user will need to first create the displayed forms using the Screen Designer.



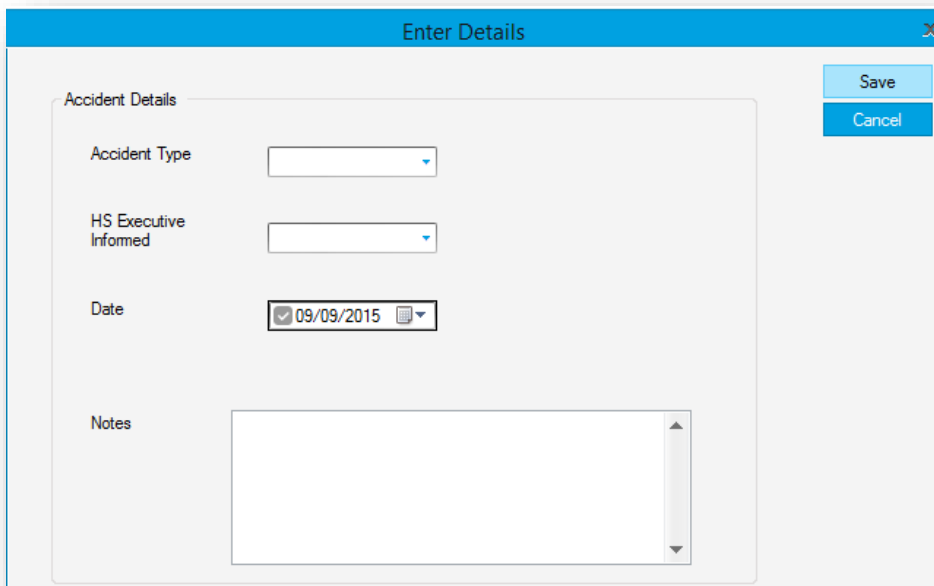
- Switch on the toggle Screen Designer
- Click the designer button



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

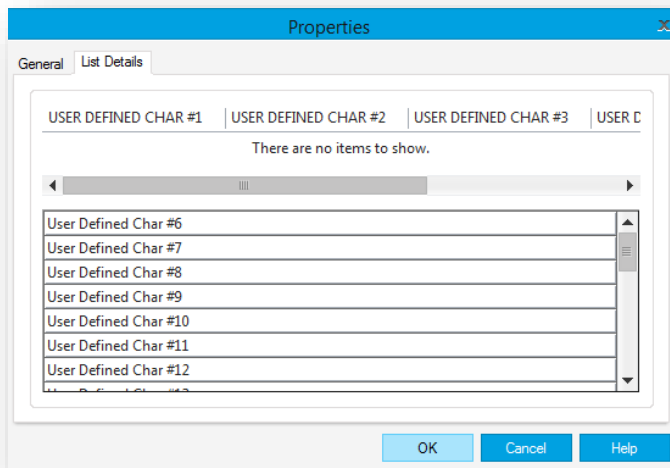


A blank form will appear then design this as for a blank page.



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:



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.

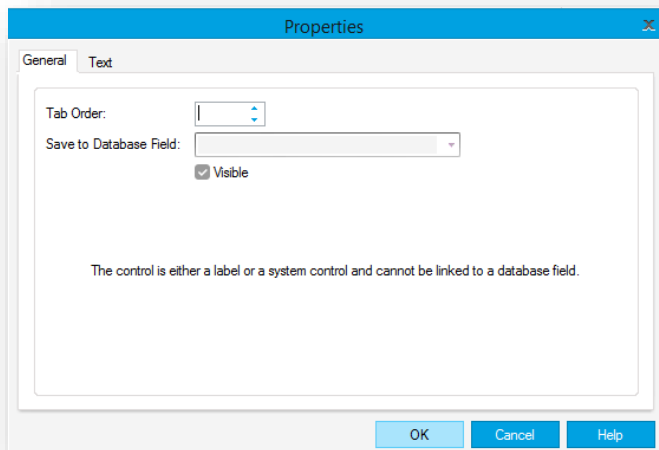
Once the columns headings have been set up, click on the OK button and exit the Screen Designer.



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

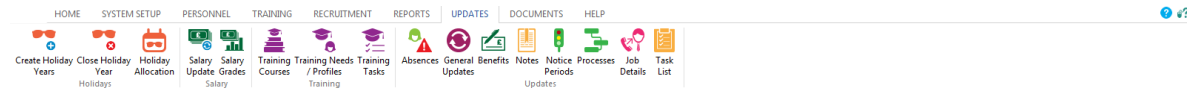
If a user wishes to add a control over an existing control, the first control must be hidden. To do this

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

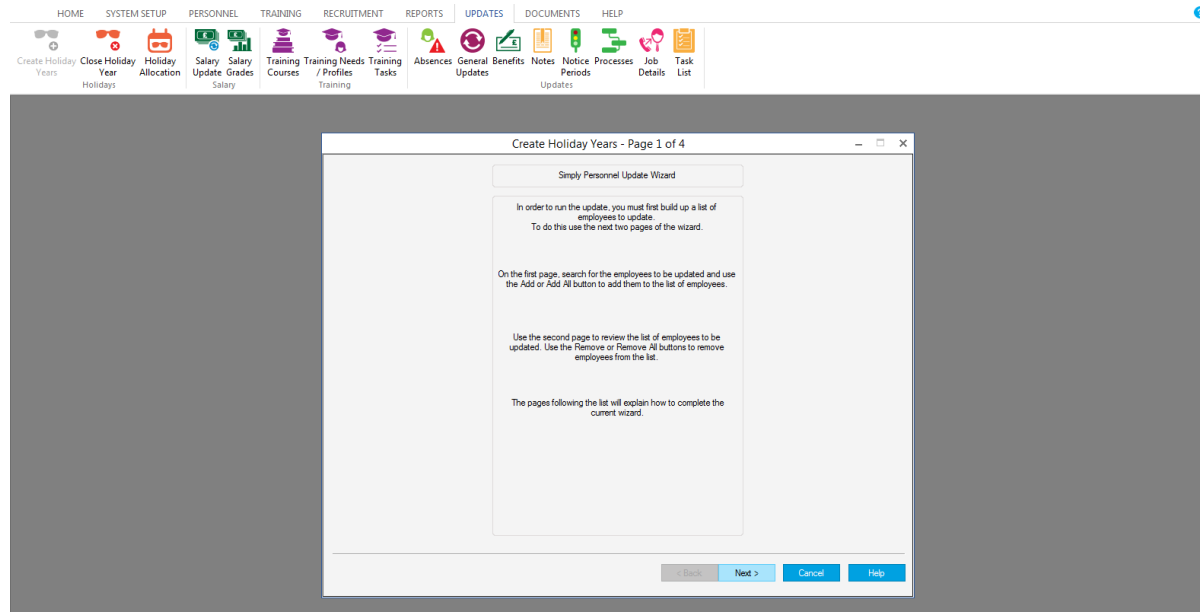


Global Updates

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

Employee ID:

Surname:

Forename:

Payroll ID:

NI Number:

Include Leavers

Search Results:

ID	Surname ▲	Other Names ▲	Department	Location
1	Abbott	Albert	Management	London
2	Adams	Matthew	Sales	London
25	Ainsworth	Julie	Sales	London
26	Alcock	Vicky	Sales	London
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
17	Eden	John	Production	Leeds
11	Emmerson	Kieth	Sales	London
18	Empson	Phillip	Production	Leeds
13	Falkner	Sam	Production	London
31	Glover	Jane	Sales	London
19	Graham	Jane	Administration	Leeds

Users can use the different tabs to filter employees by their department/location etc.

Highlight the employee's, select add

Alternatively select Add all; the wizard will add all the employee in the list

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

ID	Surname	Other Names	Department	Location
1	Abbott	Albert	Management	London
2	Adams	Matthew	Sales	London
25	Ainsworth	Julie	Sales	London
26	Alcock	Vicky	Sales	London
3	Bathley	Catherine	Management	London
4	Beasley	James	Management	London
29	Brown	James	Production	London
32	Burton	Domonik	Production	Leeds
27	Butler	Adam	Production	London
30	Clark	Simon	Production	London
10	Cocknill	Loyd	Production	London
40	Colins	Sam	Administration	Birmingham
5	Cooke	Jenny	Accounts	London
15	Cooper	Rodger	Production	Leeds
17	Eden	John	Production	Leeds
11	Emmerson	Kieth	Sales	London
18	Empson	Phillip	Production	Leeds
13	Falkner	Sam	Production	London
31	Glover	Jane	Sales	London
19	Graham	Jane	Administration	Leeds
12	Hill	Sara	Administration	London
45	Htrfa	Tzajhat 1		
21	Idle	Mike	Production	Glasgow
23	Jackson	Simon	Production	Glasgow
22	Jagger	Roy	Production	Glasgow

Remove Remove All Print Export

< Back Next > Cancel Help

Users can also remove employee records at this stage

- 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:

Holiday Profile:

Holiday Year:

Bank Holiday Profile:

Start Date:

End Date:

Use Normal Entitlement

Set Entitlement To

Entitlement in Hours

Update existing holiday years with the new entitlement

[Preview](#)

Employees to be updated: 42

The Preview button will allow you to see the changes that will be made before performing the update. Select the Finish button to perform the update, or the Back button to add or remove employees.

[< Back](#) [Finish](#) [Cancel](#) [Help](#)

Before applying the change a preview of the adjustment can be viewed displaying the records being updated and the areas being updated

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

Simply Personnel Demo Global Holiday Year Audit Report
Report Date: 09/09/2015

Holiday Profile: Holiday Year
Holiday Year: 2016
Bank Holiday Profile: England and Wales
Holiday Year Start Date: 01/01/2016
Holiday Year End Date: 31/12/2016
Using the employee's normal entitlement
Not updating the entitlement of existing holiday years

Update of Employees

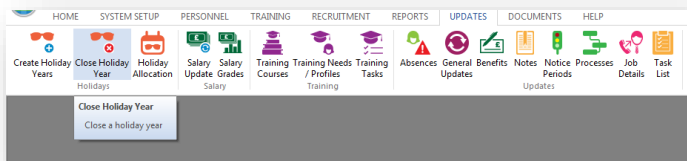
Employee ID	Employee Name	Entitlement
1	Adrian	28.00
2	Adrian	28.00
3	Adrian	28.00
4	Adrian	28.00
5	Adrian	28.00
6	Adrian	28.00
7	Adrian	28.00
8	Adrian	28.00
9	Adrian	28.00
10	Adrian	28.00
11	Adrian	28.00
12	Adrian	28.00
13	Adrian	28.00
14	Adrian	28.00
15	Adrian	28.00
16	Adrian	28.00
17	Adrian	28.00
18	Adrian	28.00
19	Adrian	28.00
20	Adrian	28.00
21	Adrian	28.00
22	Adrian	28.00
23	Adrian	28.00
24	Adrian	28.00
25	Adrian	28.00
26	Adrian	28.00
27	Adrian	28.00
28	Adrian	28.00
29	Adrian	28.00
30	Adrian	28.00
31	Adrian	28.00
32	Adrian	28.00
33	Adrian	28.00
34	Adrian	28.00
35	Adrian	28.00
36	Adrian	28.00
37	Adrian	28.00
38	Adrian	28.00
39	Adrian	28.00
40	Adrian	28.00
41	Adrian	28.00
42	Adrian	28.00

Employees Not Updated

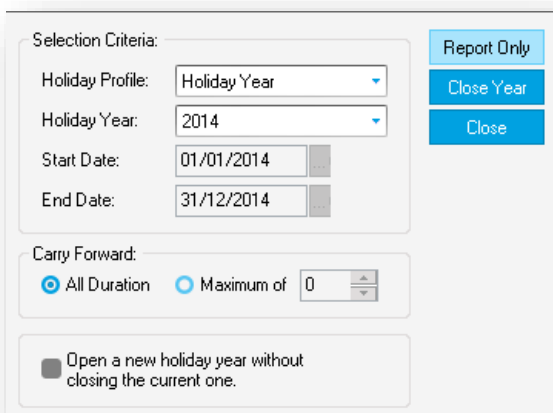
Employee ID	Employee Name	Entitlement
43	Adrian	28.00
44	Adrian	28.00
45	Adrian	28.00

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.

A dialog box titled 'Close Holiday Year' with the following fields and options:

- Selection Criteria:**
 - Holiday Profile:
 - Holiday Year:
 - Start Date:
 - End Date:
- Carry Forward:**
 - All Duration
 - Maximum of
- Open a new holiday year without closing the current one.

On the right side of the dialog, there are three buttons: 'Report Only' (light blue), 'Close Year' (blue), and 'Close' (dark blue).

HOLIDAY ALLOCATION

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

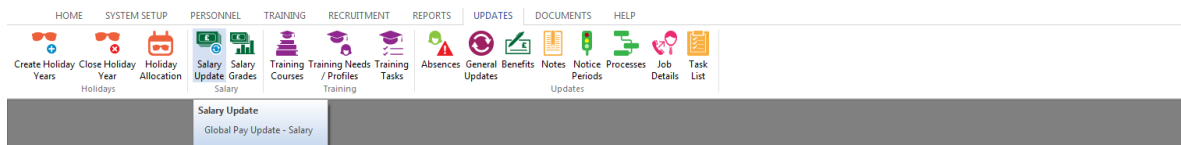
The screenshot displays the 'Holiday Allocation - Page 4 of 4' window. The 'Holiday Details' section includes the following fields:

- Start Date: 09/09/2015
- End Date: 15/09/2015
- Duration (Days/Hrs): 5 days, 37:30 hours
- Planner Colour: Yellow
- Bank Holiday:
- Category: (Dropdown menu)
- Notes: (Text area)

Below the form, it states 'Employees to be updated: 42'. A note reads: 'The Preview button will allow you to see the changes that will be made before performing the update. Select the Finish button to perform the update, or the Back button to add or remove employees.' At the bottom, there are buttons for '< Back', 'Finish', 'Cancel', and 'Help'.

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

SALARY UPDATE

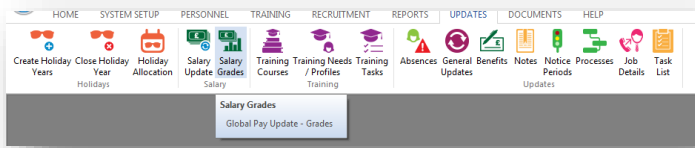


This section will allow a user to update multiple salaries.

The screenshot shows a dialog box titled "Salary Update - Page 4 of 4". It contains the following fields and controls:

- Pay Change:** A section header.
- Effective Date:** A date field set to "09/09/2015" with a "Preview" button to its right.
- Old Pay:** A dropdown menu set to "<<ALL>>".
- Change Options:** Three radio buttons with corresponding input fields:
 - Absolute Change To: £0.00
 - Amount Change By: £0.00
 - Percentage Change Of: 2
- Employees to be updated:** A text field containing the value "42".
- Navigation Buttons:** Four buttons at the bottom: "< Back", "Finish", "Cancel", and "Help".

SALARY GRADE



This function will allow a user to update salary grades

Selection Criteria:

Salary Grade:

Pay:

Period:

Apply This Pay To All Employees On This Grade

Change Grade Pay

Pay Change:

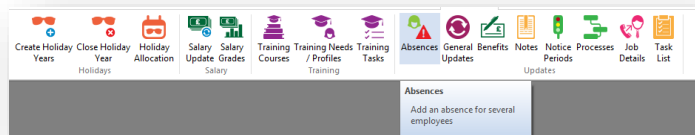
Effective Date:

Absolute Change To:

Amount Change By:

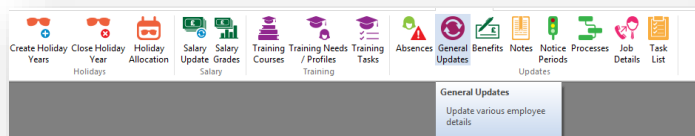
Percentage Change Of:

ABSENCES

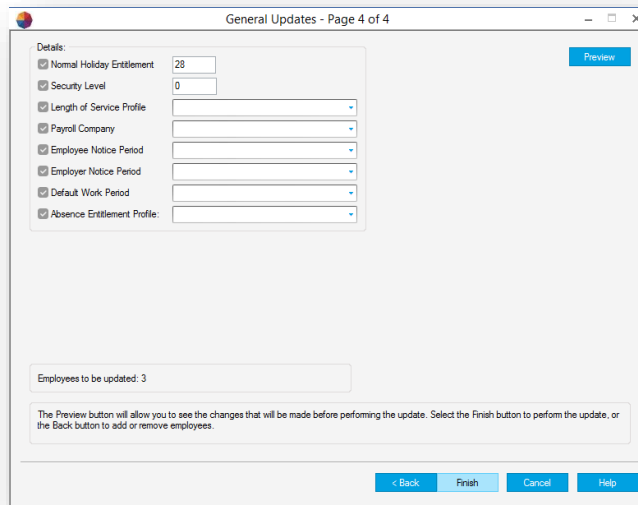


This section will allow a user to apply an absence to multiple employees such as severe weather.

GENERAL UPDATES

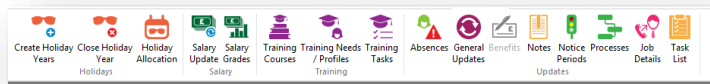


Within this section a user can update multiple areas of an employee record



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

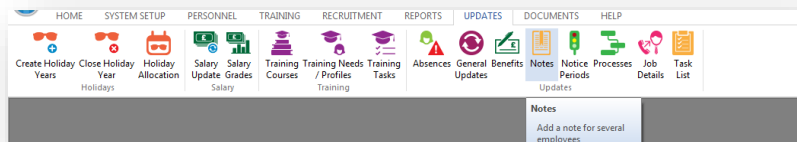
BENEFITS



Here a user can apply a benefit to multiple employees

A screenshot of the 'Benefit Details' form. It includes fields for Benefit (dropdown), Start Date (09/09/2015), End Date, Number (1), and Annual Value (€0.00, GBP). There is a 'Notes' text area and a 'PHI Benefit' section with fields for Membership Number, Type, Enrolment Date, Provider, Group Number, and Plan. At the bottom, it says 'Employees to be updated: 5' and has buttons for Back, Finish, Cancel, and Help.

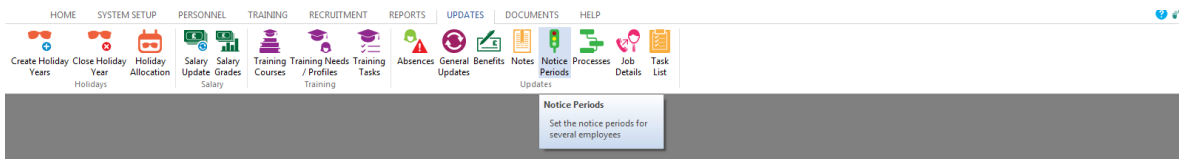
NOTES



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

A screenshot of the 'Note Details' form. It includes fields for Date (09/09/2015) and Category (Minutes Notes). There is a large 'Notes' text area and a field for 'Employees to be updated: 5'. At the bottom, it has buttons for Back, Finish, Cancel, and Help.

NOTICE PERIODS



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

Notice Period Details:

Select whether you want to set the notice periods for the employees or if you want to update them based on the employee's length of service. The employees must have a length of service profile set on the Work screen to use this second option.

Set Notice Periods

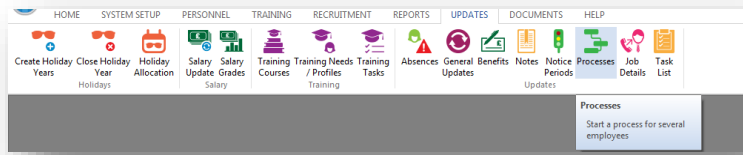
- Employee Notice Period: 1 Month
- Employer Notice Period: 1 Month

Update Notice Periods Based on Length of Service

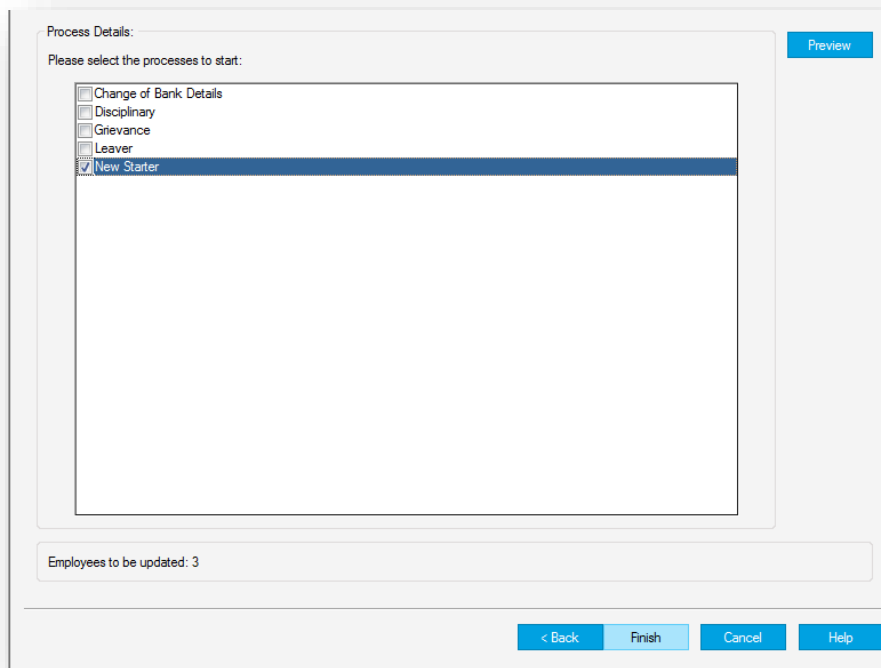
Employees to be updated: 42

[< Back](#) [Finish](#) [Cancel](#) [Help](#) [Preview](#)

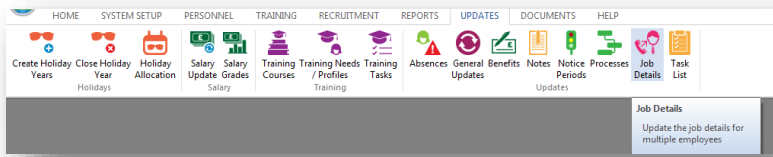
PROCESSES



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



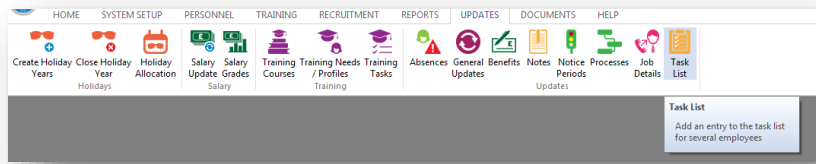
JOB DETAILS



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

A screenshot of the 'Job Details' form. The form is titled 'Job Details:' and includes a 'Preview' button in the top right corner. Below the title, there is a warning: 'Leaving an option blank or set to zero will prevent this option being updated.' The form contains several input fields and buttons: 'Post:' with a dropdown menu; 'Manager:' with a text field containing 'No Manager Selected' and 'Set' and 'Clear' buttons; 'Hierarchy:' with a text field and 'Set' and 'Clear' buttons; 'Hours per Week:' with a text field containing '0'; and 'Full Time Hours:' with a text field containing '0'. Below these fields is an 'Update Options:' section with two radio buttons: 'Create a new job record' (unselected) and 'Update the current job record' (selected). There is also a text field for 'Employees to be updated:' containing the number '4'. A note at the bottom states: 'The Preview button will allow you to see the changes that will be made before performing the update. Select the Finish button to perform the update, or the Back button to add or remove employees.' At the very bottom of the form are four buttons: '< Back', 'Finish', 'Cancel', and 'Help'.

TASK LIST

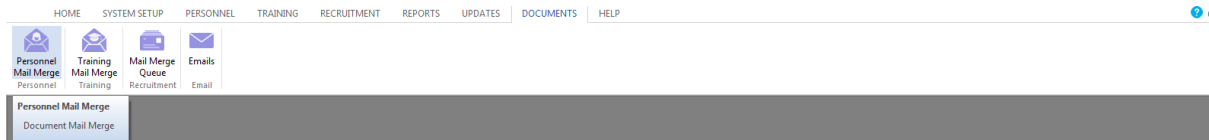


Here a task can be entered against multiple employee records.

A screenshot of a 'Task Details' form. The form has a 'Task' dropdown menu with 'Health & Safety Review' selected. Below it is an 'Actioned By' dropdown menu with 'ADMIN' selected. There is a 'Task Date' field with '09/09/2015' and a calendar icon. A 'Task Time' field is empty. Below these fields is a large 'Notes' text area. At the bottom of the form, there is a field labeled 'Employees to be updated: 42'. At the very bottom of the form are four buttons: '< Back', 'Finish', 'Cancel', and 'Help'. A 'Preview' button is located to the right of the 'Task' dropdown.

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.

Please select the document to merge the employee information into.

Preview

< Back Next > Cancel Help

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

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

Document Information:

Standard Document:

Total employees:

Printing:

Print mail merged document directly

Review mail merged document first

Merge To Email

Subject:

Email Address:

Email as Attachment

Save Options:

Save the merged document against each employee

Save a record against each employee that the document was produced

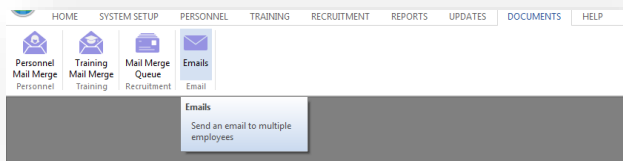
Do not save the documents

Please review the document settings before proceeding further.

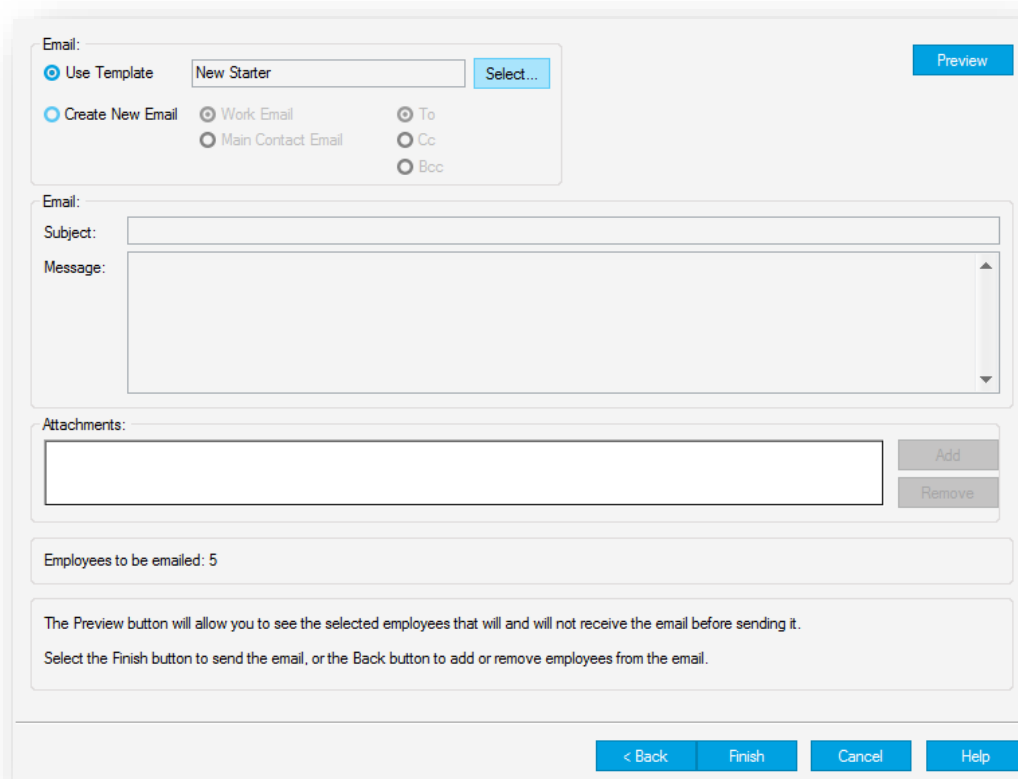
Clicking on Next will perform the mail merge.

EMAILS

A user can send an email to multiple employees.

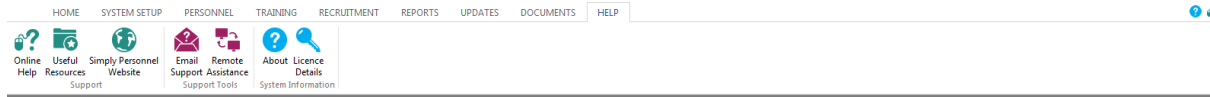


Navigate through the wizard to select the employees and select the email template or the user can create a new.

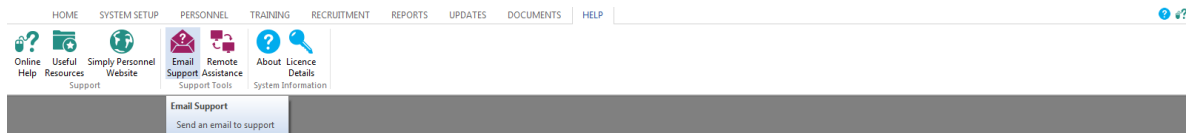
A screenshot of the 'Emails' wizard form in the Personnel Manager software. The form is titled 'Email:' and has a 'Preview' button in the top right corner. It contains several sections: 1. 'Email:' section with radio buttons for 'Use Template' (selected) and 'Create New Email'. The 'Use Template' section has a dropdown menu showing 'New Starter' and a 'Select...' button. The 'Create New Email' section has radio buttons for 'Work Email', 'Main Contact Email', 'To', 'Cc', and 'Bcc'. 2. 'Email:' section with a 'Subject:' text box and a 'Message:' text area. 3. 'Attachments:' section with a text box and 'Add' and 'Remove' buttons. 4. 'Employees to be emailed: 5' section. 5. A text box containing instructions: 'The Preview button will allow you to see the selected employees that will and will not receive the email before sending it. Select the Finish button to send the email, or the Back button to add or remove employees from the email.' 6. A bottom bar with four buttons: '< Back', 'Finish', 'Cancel', and 'Help'.

Help and About Simply Personnel

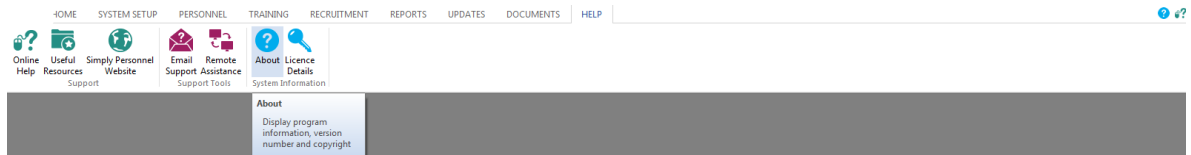
A user can search for online help and useful resources, also navigate to the Simply Personnel website to view up and coming developments.



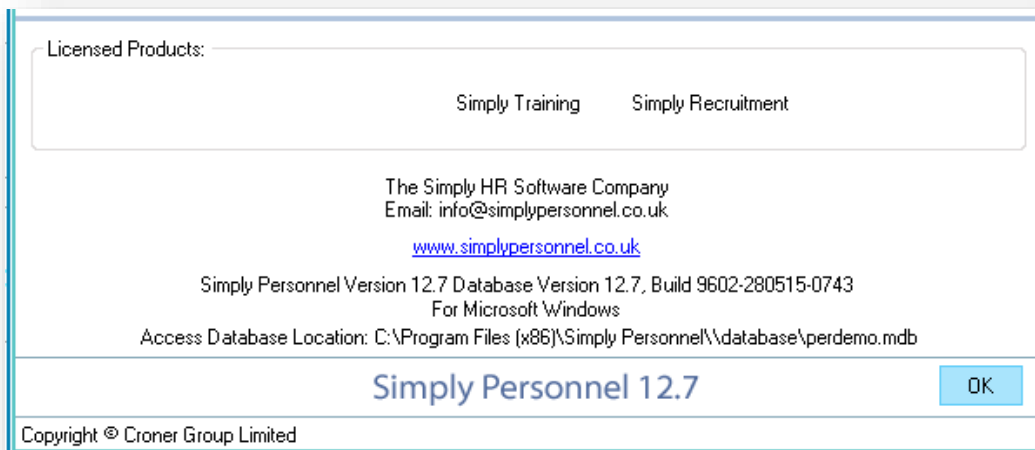
Users can also contact the support team via email which will create a unique support ticket.



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 www.islonline.net where the Support Engineer will provide a unique code.



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



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

Simply Personnel Licence Details

Welcome!

Welcome to Simply Personnel.

In order to use Simply Personnel you must enter the product licence details on the right.

This information will have been provided to you by your software supplier.

Employees

Used:	42
Remaining:	8

Licence Details:

Company Name: Simply Personnel Demo

Expiry Date: 31 12 2999

Max Employees: 50

Users: 1

<input checked="" type="checkbox"/> Simply Personnel	<input type="checkbox"/> Timesheets
<input checked="" type="checkbox"/> Simply Training	<input type="checkbox"/> Expenses
<input checked="" type="checkbox"/> Simply Recruitment	<input type="checkbox"/> Time and Attendance
<input type="checkbox"/> Self Service	<input type="checkbox"/> Rostering
<input checked="" type="checkbox"/> On Support	

Support Expiry: 31/12/2999

Licence Code: XFSK B555 EQWS KBBH

Simply Personnel

Email: info@simplypersonnel.co.uk

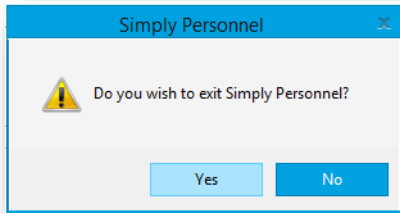
www.simplypersonnel.co.uk

OK

Cancel

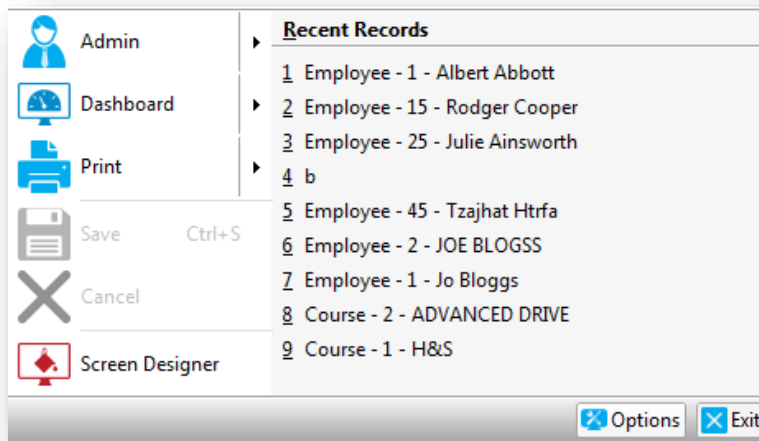
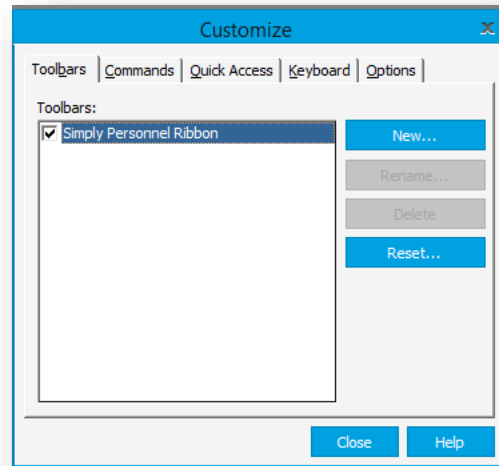
Logging out of Simply Personnel

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

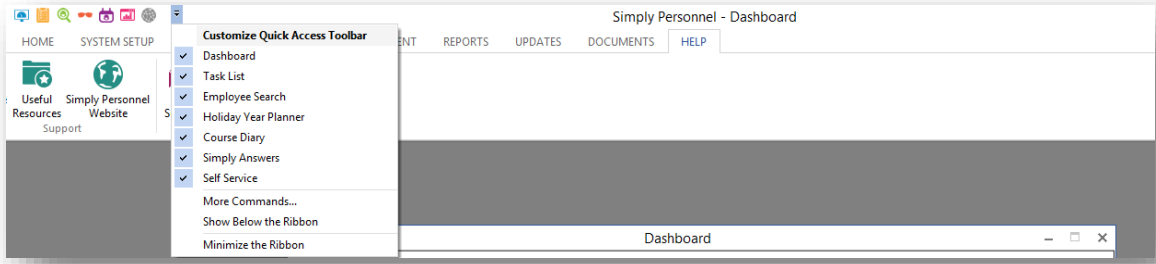


By selecting the X in the top right corner of the software.

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



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



MY NOTES