

Simply Personnel- Self Service

Login

Username: [Forgot Username?](#)

Password: [Forgot Password?](#)

Remember me on this computer [Bookmark this page](#)

[Forget me on this computer](#)

Simply Personnel 2006-2016. Version 2016 Release 1. Build Number:9800-30082016.

Training Workbook

Objectives

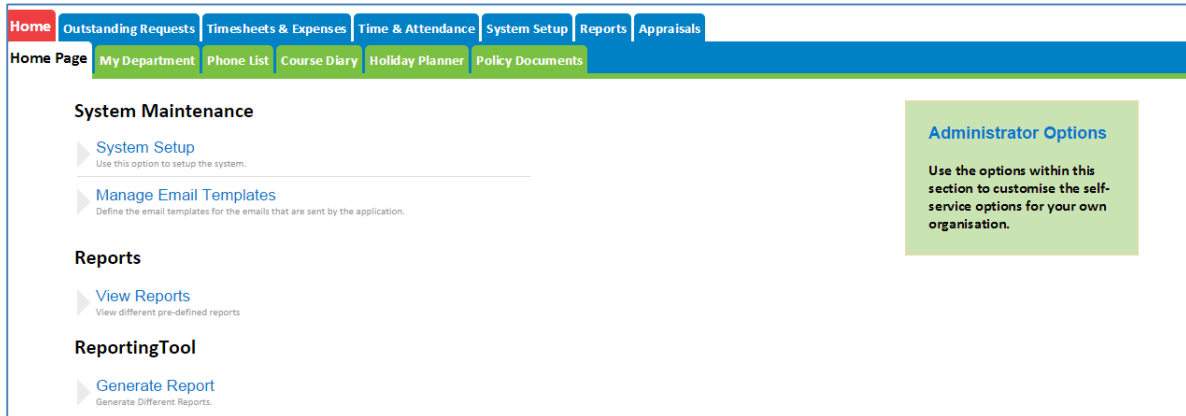
- Manage user accounts e.g. enable disable and reset user accounts
- Maintain user permissions and access type
- Have visibility of authorisation requests
- Determine and reroute authorisation requests
- Documents – Upload, view and maintain policy documents
- Utilise declaration upon reading policy documents for auditing purposes
- Execute administrator procedures- authorise employee details changes
- Build performance profiles for online management of appraisal process
- Companywide holiday planners
- Set tasks for users

Contents

Logging in and out.....	5
Home-page.....	6
System Setup	7
Login/Profiles	8
Users	9
Manage Security Profiles	11
Manage Authorisation Profiles	14
Holidays & Absences	17
Performance Profile Management	18
Policy Document Management	25
Phone Book Configuration	30
Security Settings.....	31
System Set-up Global settings	33
Email Configuration	35
Outstanding requests.....	39
My Department.....	40
Phone List.....	46
Holiday Planner.....	47
Course Diary	48
Policy Documents.....	49
Reports.....	50

Introduction to Self Service

The Self Service module is an online employee management system; it is an online tool allowing users to submit change requests for their own details and have these requests authorised by either their reporting manager or the HR admin of the system.

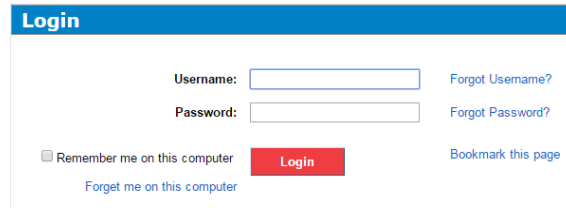


The screenshot displays the Croner Self Service Administrator interface. At the top, there is a navigation bar with the following tabs: Home (highlighted in red), Outstanding Requests, Timesheets & Expenses, Time & Attendance, System Setup, Reports, and Appraisals. Below this, a secondary navigation bar includes Home Page (highlighted in green), My Department, Phone List, Course Diary, Holiday Planner, and Policy Documents. The main content area is divided into several sections:

- System Maintenance**
 - [System Setup](#)
Use this option to setup the system.
 - [Manage Email Templates](#)
Define the email templates for the emails that are sent by the application.
- Reports**
 - [View Reports](#)
View different pre-defined reports
- ReportingTool**
 - [Generate Report](#)
Generate Different Reports.

On the right side of the interface, there is a green box titled **Administrator Options** with the text: "Use the options within this section to customise the self-service options for your own organisation."

Logging in and out



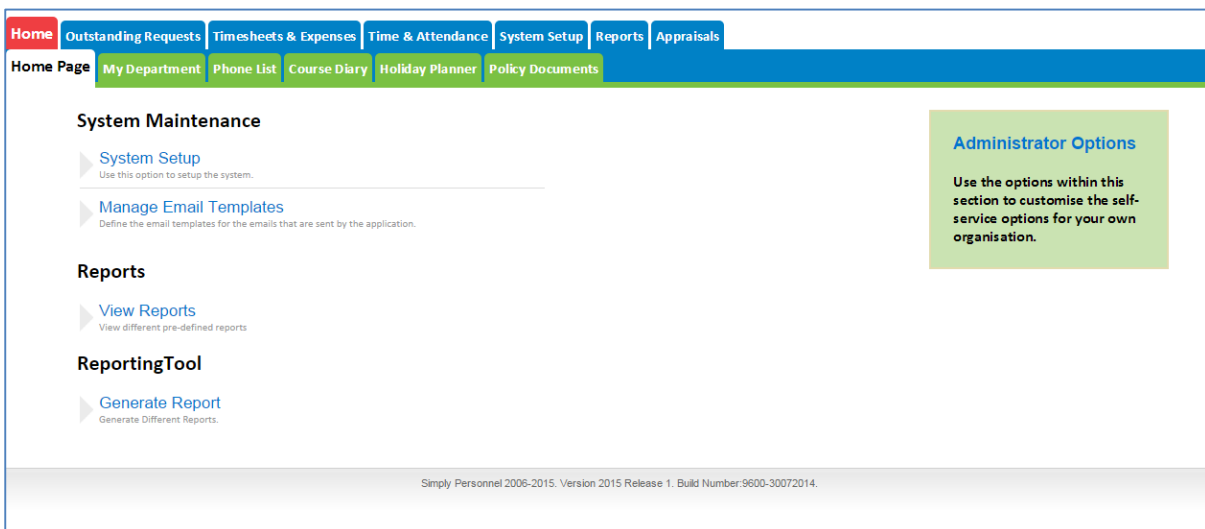
The screenshot shows a login form with a blue header labeled "Login". It contains two input fields for "Username" and "Password", each with a "Forgot" link to its right. Below the password field is a checkbox for "Remember me on this computer" and a red "Login" button. A "Bookmark this page" link is located to the right of the "Login" button. At the bottom left, there is a link that says "Forget me on this computer".

- Enter username and password
- Select login

Home-page

Once an administrator user has logged into their Self Service system they will be greeted with an administrator dashboard.

An administrator logon is the only profile that has access to the system setup tab, this section allows users to define what other users can see and do within the system. Administrators can define what a user can amend and if they can amend something if another user such as a manager should receive an approval request.



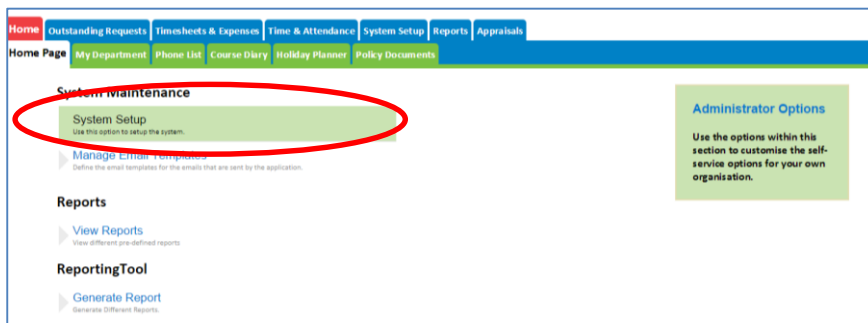
The screenshot displays the administrator dashboard interface. At the top, there is a navigation bar with tabs for 'Home', 'Outstanding Requests', 'Timesheets & Expenses', 'Time & Attendance', 'System Setup', 'Reports', and 'Appraisals'. Below this, a secondary navigation bar includes 'Home Page', 'My Department', 'Phone List', 'Course Diary', 'Holiday Planner', and 'Policy Documents'. The main content area is divided into sections: 'System Maintenance' with links for 'System Setup' (Use this option to setup the system.) and 'Manage Email Templates' (Define the email templates for the emails that are sent by the application.); 'Reports' with a link for 'View Reports' (View different pre-defined reports); and 'ReportingTool' with a link for 'Generate Report' (Generate Different Reports.). A green callout box on the right side is titled 'Administrator Options' and contains the text: 'Use the options within this section to customise the self-service options for your own organisation.' At the bottom of the page, a footer line reads: 'Simply Personnel 2006-2015. Version 2015 Release 1. Build Number:9600-30072014.'

System Setup

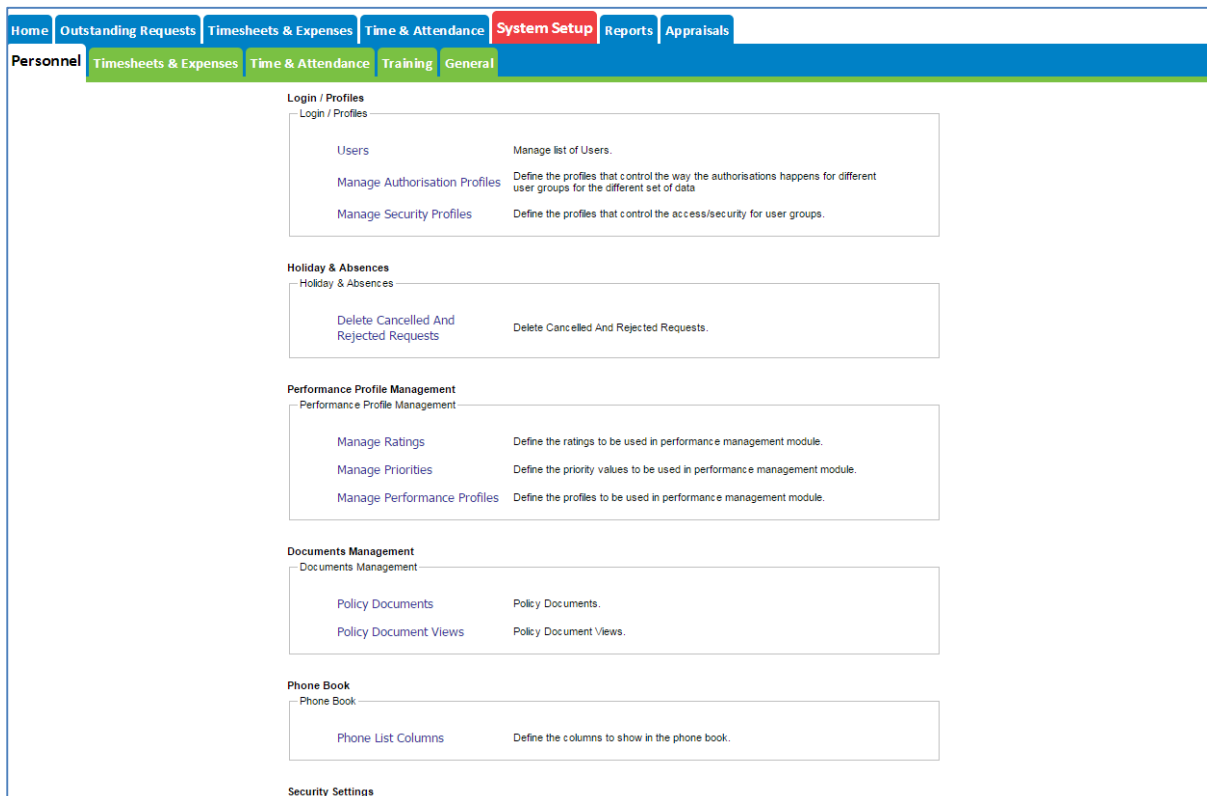
It is from this area that the administrator of the Self Service site can begin to configure user profile permissions and manage authorisation routes.

The area allows the administrator to manage the employees that have access to the Self Service module. This manual will detail where the administrator can set the permissions each user type has and if the user type has certain a permission if it needs to follow an authorisation procedure.

- Select System setup

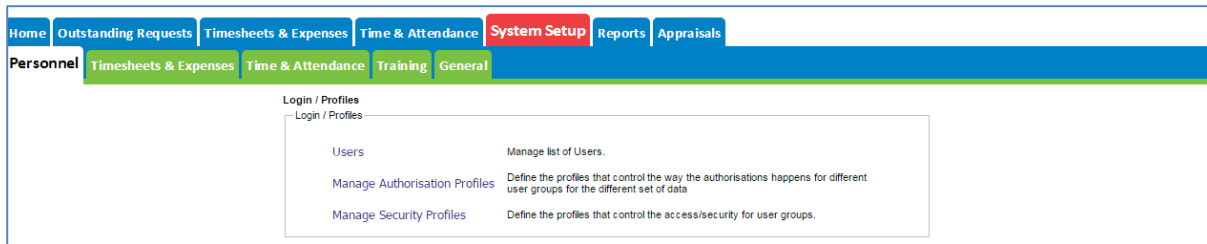


The system setup area will then appear



Login/Profiles

This area allows the administrator of the site to configure what areas users have access to and relevant the permissions. There are 3 types of control on each screen which are; add, update and delete. Users can see a list of user logons to the site for resetting passwords and usernames and also checking configuration.



Administrators can amend the profile a user is assigned to which will adjust the tabs that appear when the user logs in.

There are four standard security profiles within the system.

Admin:- This account will have access to all accounts and all areas of the system

HR :- This account will have access to all employee records but will not have access to the system setup tab

Manager:- The user assigned to this profile will have a view of the employees that report to them, reporting features are also available

Employee:- Users assigned to this profile will have access to their own information and if the admin account so wished access to team holiday planner or the whole company

Teamleader:- The user with this profile will be able to see the employees who report to them but are unable to access the report feature.

Users

This section enables the administrator to view user accounts that have access to the self-service site, usernames and passwords can be reset and accounts can also be disabled. The user accounts will integrate with the Personnel record held within the main desktop application.

Home Outstanding Requests Timesheets & Expenses Time & Attendance System Setup Reports Appraisals					
Personnel Timesheets & Expenses Time & Attendance Training General					
Employee ▼	Username	Create Date			
Abrams Thomas	ThomasAbrams	20/06/1905			
Alston Cheryl	CherylAlston	20/06/1905			
Avery Jessica	JessicaAvery	20/06/1905			
Baldwin Grace	GraceBaldwin	20/06/1905			
Ball Scott	ScottBall	20/06/1905			
Barefoot Joy	JoyBarefoot	20/06/1905			
Barnett Malcolm	MalcolmBarnett	20/06/1905			
Barnett Vickie	VickieBarnett	20/06/1905			
Beard Cindy	CindyBeard	20/06/1905			
Bender Johnny	JohnnyBender	20/06/1905			
Best Clifford	CliffordBest	20/06/1905			
Black Leah	LeahBlack	20/06/1905			
Blackburn Sidney	SidneyBlackburn	20/06/1905			
Bloggs Joe	joe.bloggs	01/05/2015			
Buck Ben	BenBuck	20/06/1905			
Carroll Alexandra	AlexandraCarroll	20/06/1905			
Chang James	JamesChang	20/06/1905			
Cho Leon	LeonCho	20/06/1905			
Christensen Henry	HenryChristensen	20/06/1905			

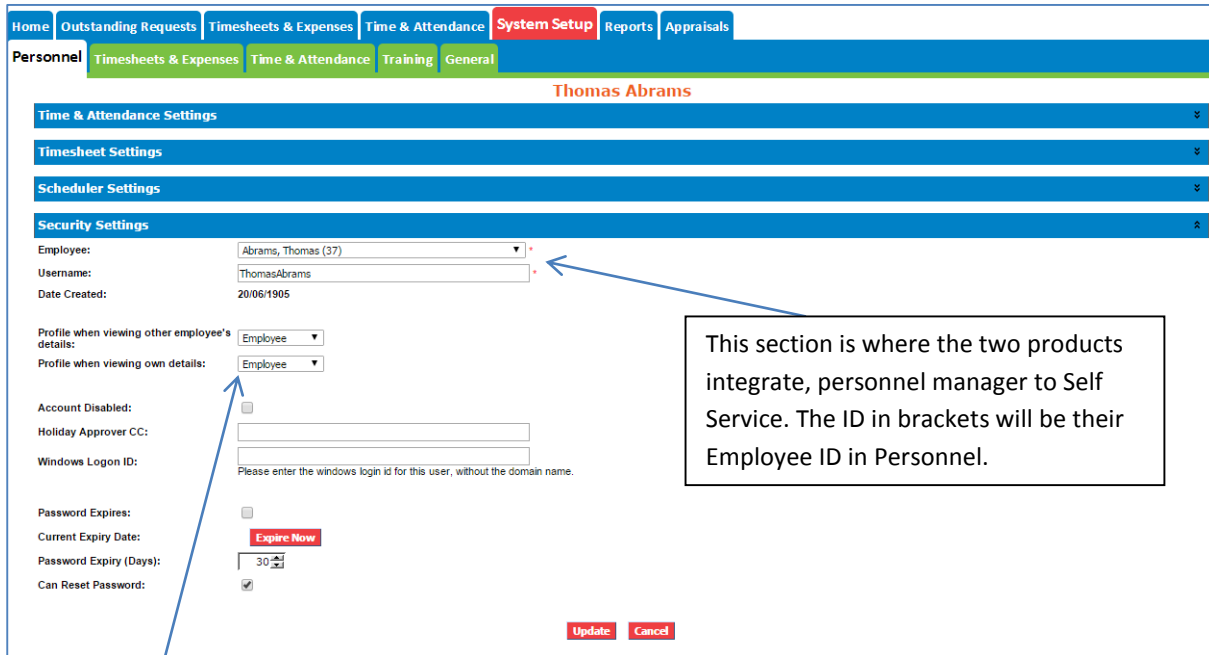
The cog and spanner is where a user can apply security settings per individual

The red cross will remove an employee account (It will not remove the record from the Personnel system)

The key symbol will allow an administrator to reset and individual's password

Cog & Spanner

This section of security settings allows an administrator to apply permissions on an individual basis also reset usernames.



This section is where the two products integrate, personnel manager to Self Service. The ID in brackets will be their Employee ID in Personnel.

Profile when viewing other employee details

Profile when viewing own details

This section will determine what a user can see and do on their own record and if they are a manager what they can see and do on their teams records.

Refer to 'Manage Security Profiles' for extensive detail.

Account Disabled:- Upon checking this section the user will no longer be able to login to Self Service until the check is removed.

Holiday Approver CC:- An email address can be entered here upon approval of the individuals holiday

Windows Logon ID:- Self Service can be enabled for Windows Authentication and the guide below will guide your IT department on how

<https://simplypersonnel.zendesk.com/entries/23339466-Active-Directory-Authentication-Self-Service-only->

Password Expires The section enables an administrator user to set expiry permissions on the password for the user and enable them to reset their own password.

- Click update to save the settings

Manage Security Profiles
















This section defines the user profiles available and the permissions set that control the access/security for user groups. Administrators can also create bespoke security profiles.

Home Outstanding Requests Timesheets & Expenses Time & Attendance System Setup Reports Appraisals

Personnel Timesheets & Expenses Time & Attendance Training General

Getting Started with Security Profile Details?
Define the profiles that control the access/security for user groups.

Security Profile Details [Create New Security Profile](#)

Active	Security Profile	Profile Type	Authorisation Profile	Download
True	Admin	Admin	Admin	  
True	Employee	Employee	Employee	  
True	HR	HR	HR	  
True	Manager	Manager	Manager	  
True	Team Leader	Team Leader	Team Leader	  

This section allows admins to create bespoke security profile

This will allow the user to drill down in to the screens a user profile has access to and the permissions on these screens such as add, update and delete.

A security profile can be disabled from here the profile will no longer be available to assign to a user.

This will only be available to custom profiles and those that are not in use.

This must be checked to make the profile active

Getting Started with Security Profile Details?
Define the Security Profile that control the profile security for that profile.

In Use:	<input checked="" type="checkbox"/>
Profile Name:	Employee
Profile Type:	Employee
Description:	Employee
Initial Menu Page To Show:	~/Admin/Home.aspx
Request Authorisation Profile:	Employee
Holiday Planner:	See Own Attendance
Show Managers in Team Attendance:	<input checked="" type="checkbox"/>
Show Absences on Planner:	<input checked="" type="checkbox"/>
Show Courses on Planner:	<input checked="" type="checkbox"/>
Hide Absence Reasons on Planner:	<input type="checkbox"/>

Here the user will have 3 options:

- Own attendance
- Team attendance
- Company attendance

This determines the view of the holiday planner and whether perhaps employees can view their manager's holidays

This section will allow the admin to 'Manage the screens' the employee has access to.

Save | Manage Screens | Cancel

This will allow you to activate any screen previously removed.

Manage Screens Add New Screen

Screen Name	Allow Add	Allow Update	Allow Delete		
Attendance Record	NA	NA	NA		
Employee	NA	✓	NA		
Employee Absence	✓	✓	✓		
Employee Appraisals	✓	✓	✓		
Employee Banking Details	✓	✓	✓		
Employee Contact	✓	✓	✓		
Employee Contract	NA	✓	NA		
Employee CPD	✓	✓	✓		
Employee Documents	NA	NA	NA		
Employee Emergency Contact	✓	✓	NA		
Employee Holiday	✓	✓	✓		
Employee Job History	✓	✓	✓		
Employee Notes					
Employee Performance Profiles		✓			
Employee Personal Development	✓	✓	✓		
Employee Picture	✓	✓	✓		
Employee Qualifications	✓	✓			
Employee Questionnaire	NA	✓	NA		
Employee Recruitment	✓	✓	✓		
Employee Salary History	✓	✓			
Employee TOIL	✓	✓	✓		
Employee Training Licensed	✓	✓	✓		
Employee Training Needs	✓	✓	✓		
Employee Training Profiles	NA	NA	NA		
Holiday Planner	NA	NA	NA		

On each screen which is the screens available to the employee are 3 functions add, update and delete.

If the screen states NA this means the functions are not available on this screen.

- To edit the functionality on a screen
- Select the paper and pencil icon and the following screen will appear

This will delete the screen entirely from view of the profile.

Edit Details
✕

Screen:* Employee Holiday

Allow Add:

Allow Update:

Allow Delete:

Update
Cancel

- Remove or add checks where necessary

- Select update

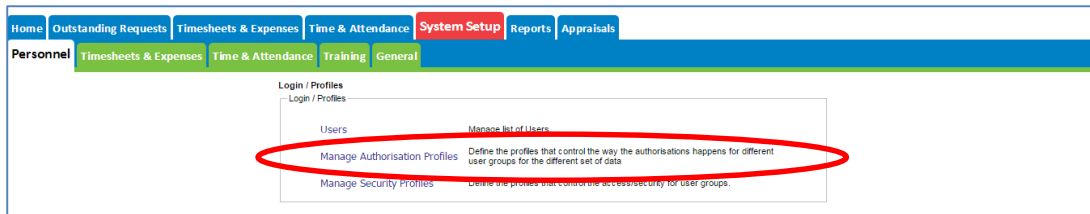


To save you must go back to the previous screen to the save function, those on the profiles will automatically update on next logon. Complete the above process to also define what the managers can see with regards to their employees.

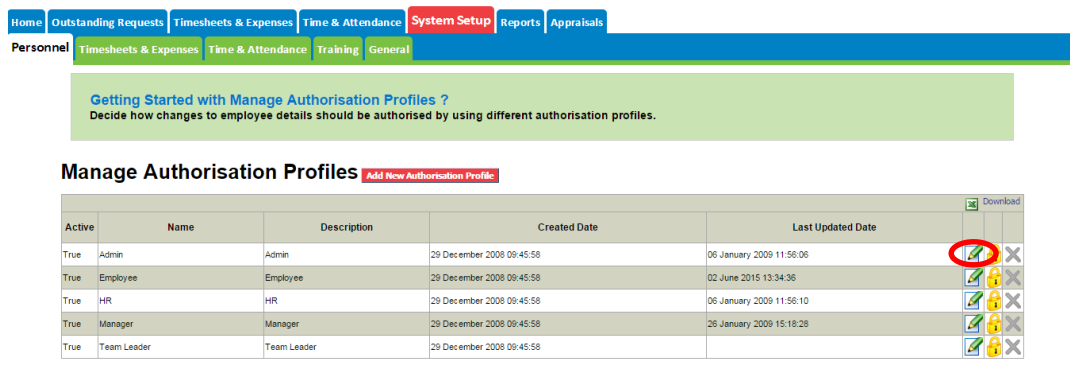
Manage Authorisation Profiles

This section is where an admin can control the direction authorisations happen for different user groups for different sets of data.

- From the main system setup select 'Manage Authorisation profiles'



- With the paper and pencil navigate to the profile the user wishes to configure the approval process for.





























The admin will then be greeted with a list of screens the user has access to and can then set an approval process

Name :

Description :

Set Authorisation For Screens

Active	Screen	CcNotification	
True	Employee		 
True	Employee Contact		 
True	Employee Emergency Contact		 
True	Employee Appraisals		 
True	Employee Notes		 
True	Employee Banking Details		 
True	Employee Contract		 
True	Employee Job History		 
True	Employee Qualifications		 
True	Employee Salary History		 
True	Employee Training Licenses		 
True	Employee Training Needs		 
True	Employee CPD		 

- Select the screen you wish to set an approval for with the paper and pencil
- Do this for each screen that requires an authorisation

Name of the profile

The name of the screen the approval is being set for.

Profile Name : Screen Name :

Authorise On Add Authorise On Update Authorise On Delete

Authoriser : (dropdown menu with options: NONE, MANAGER, ADMIN, HR, SPECIFIC, NONE)

All must Authorise
 Anyone can Authorise

CC Notification Email :

Email Template For Notification :

Email Template When Authorised :

Email Template When Rejected :

Email Template When Cancelled :

Remind Outstanding Requests :

Maximum Reminders :

Email Template For Reminder :

Email Address When Maximum Reminder Exceeds :

Email Template To Send :

Each of the listed approvers must accept the requests

Any of the approvers can accept and the request will remove from the other outstanding requests.

Set the authoriser this can be:

- Manager
- Admin
- HR
- Specific person

Functionalities to approve

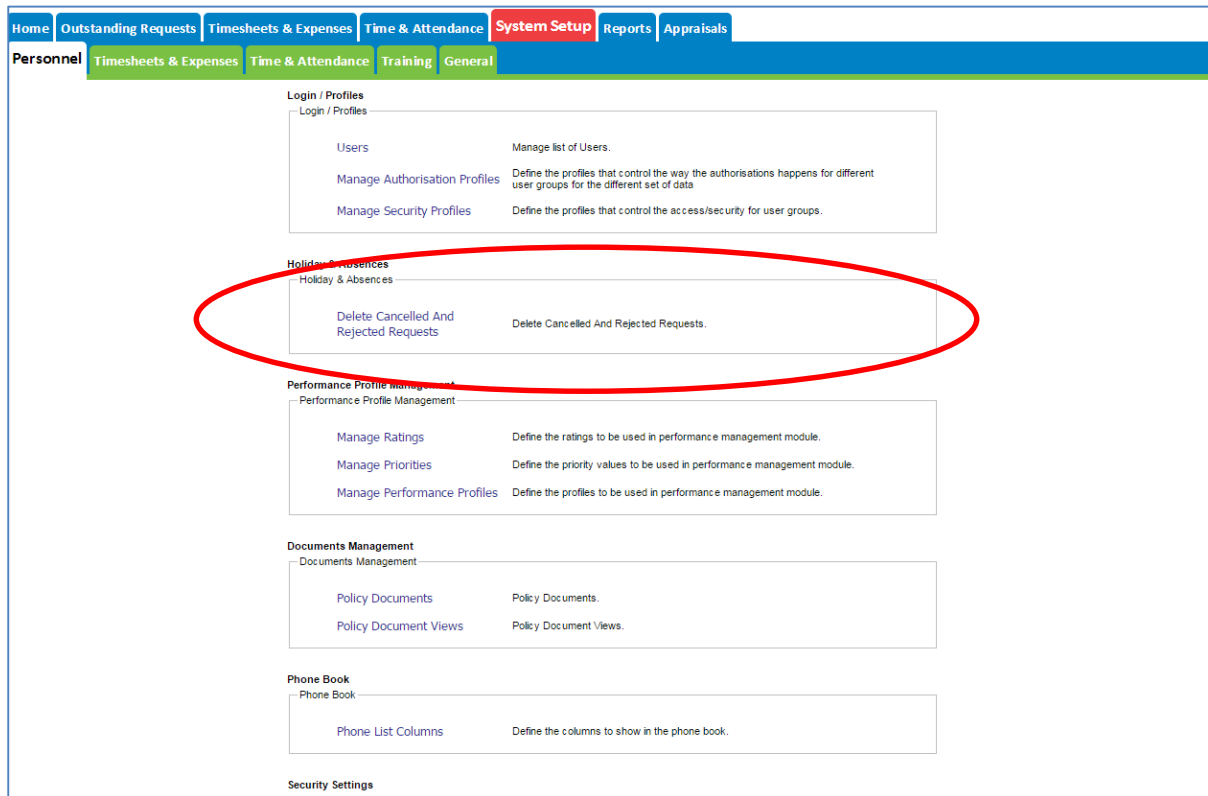


Complete the above process should any other profiles require an authorisation process.

Holidays & Absences

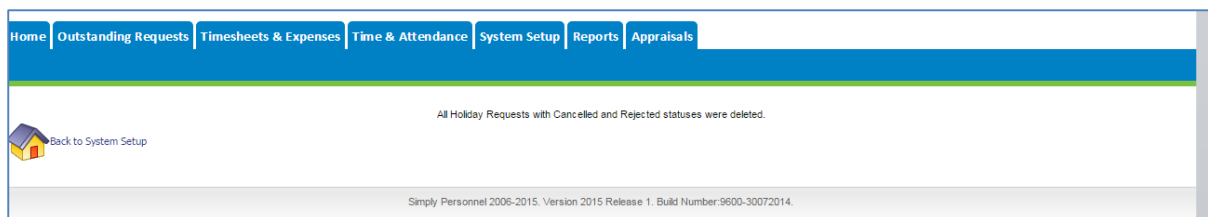
Delete cancelled and reject requests

This section is where the administrator can free up the system of deleted, cancelled and rejected requests.



The screenshot shows the 'System Setup' menu with the following sub-menus: Personnel, Timesheets & Expenses, Time & Attendance, Training, and General. The 'Holidays & Absences' section is highlighted, and the 'Delete Cancelled And Rejected Requests' option is circled in red. Other options in the 'Holidays & Absences' section include 'Login / Profiles', 'Performance Profile Management', 'Documents Management', and 'Phone Book'.

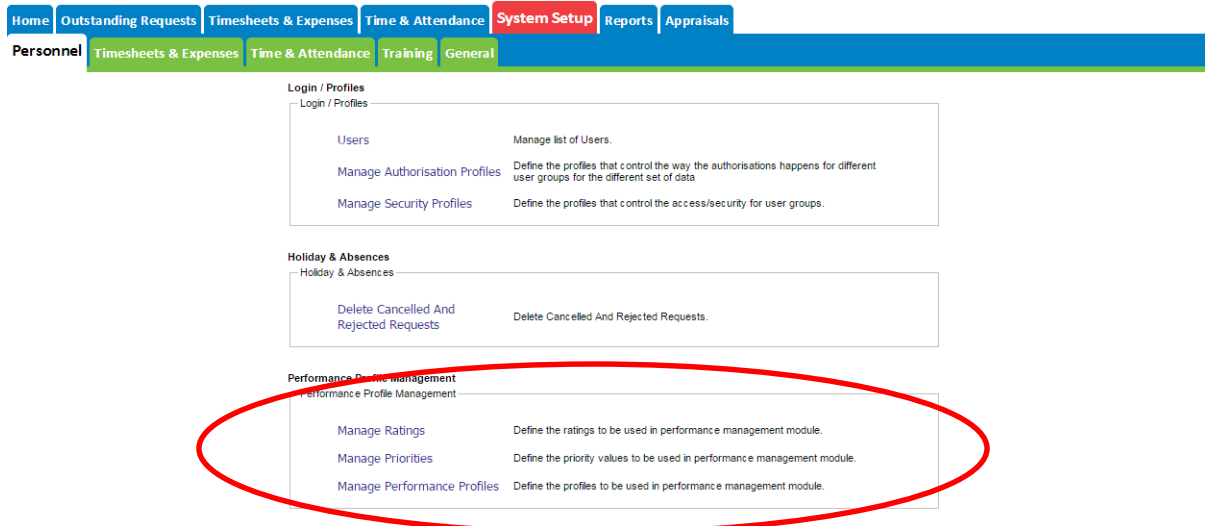
- Select delete cancelled and rejected requests
- The system will then confirm they have been removed



The screenshot shows the 'System Setup' menu with the following sub-menus: Home, Outstanding Requests, Timesheets & Expenses, Time & Attendance, System Setup, Reports, and Appraisals. A confirmation message is displayed: 'All Holiday Requests with Cancelled and Rejected statuses were deleted.' Below the message is a 'Back to System Setup' button. The footer text reads: 'Simply Personnel 2006-2015, Version 2015 Release 1, Build Number 9600-30072014.'

Performance Profile Management

In this section an administrator can create a bespoke performance profile to record details for appraisals and performance relevant to the job position of an employee.

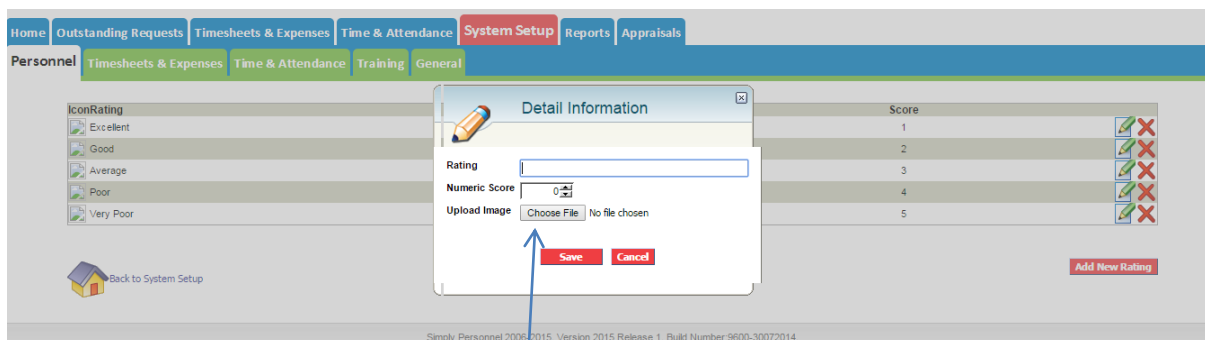


The screenshot shows the Croner System Setup interface. The 'System Setup' menu is active, and the 'Performance Profile Management' section is highlighted with a red oval. This section contains three options:

- Manage Ratings**: Define the ratings to be used in performance management module.
- Manage Priorities**: Define the priority values to be used in performance management module.
- Manage Performance Profiles**: Define the profiles to be used in performance management module.

Manage Ratings

Here the administrator can determine a score based rating for performance against job criteria.



The screenshot shows the 'Manage Ratings' interface. A 'Detail Information' dialog box is open, allowing the administrator to configure a new rating. The dialog box contains the following fields:

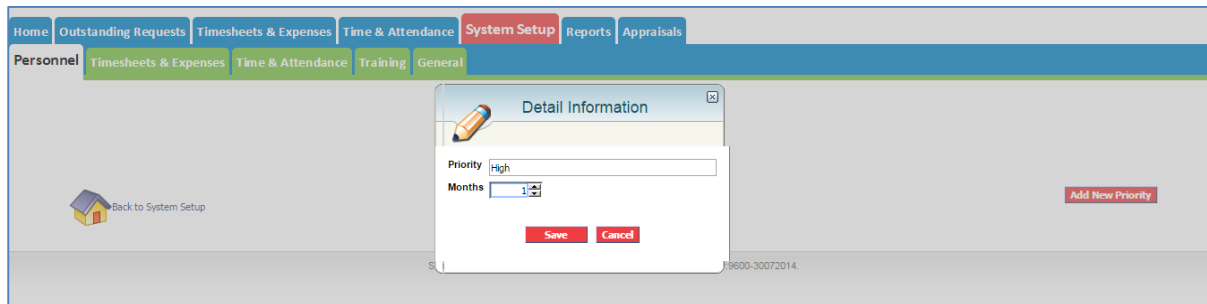
- Rating**: A text input field for the rating description.
- Numeric Score**: A numeric input field with a spinner, currently set to 0.
- Upload Image**: A 'Choose File' button and the text 'No file chosen'.
- Buttons**: 'Save' and 'Cancel' buttons.

The background shows a table of existing ratings with columns for 'IconRating', 'Score', and 'Add New Rating'.

- Select add new rating
- Enter the description of the rating e.g Excellent
- Enter the numeric score for the rating e.g 5
- Select save
- Select back to system setup to continue building the performance profile

Manage Priorities

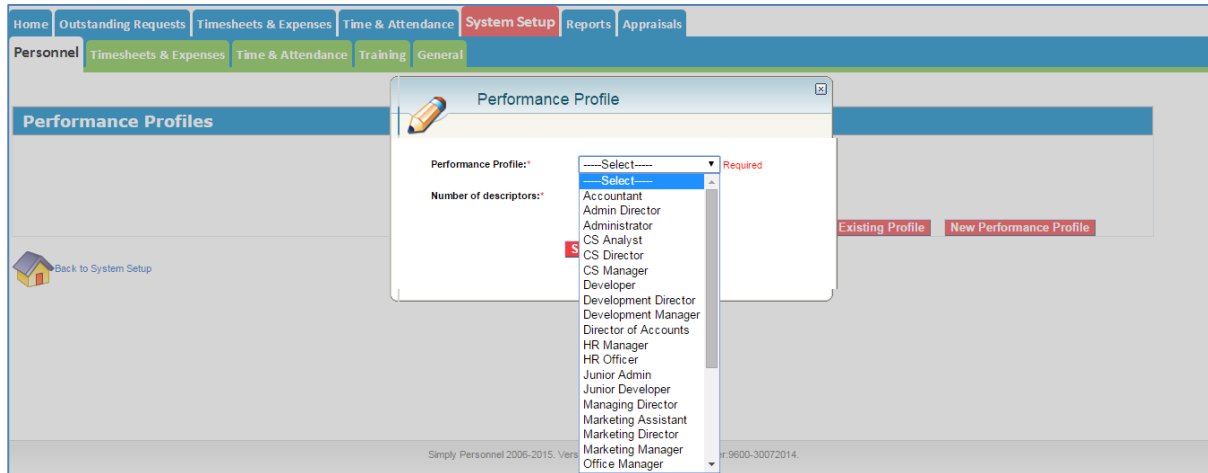
In this section an administrator can determine priority timescales to use on the performance profile against objectives defined in the profile.



- Select add new priority
- Specify the duration of the priority in months
- Select save
- Select back to system setup to continue building the performance profile.

Manage Performance Profiles

Here the user can begin to build the performance profile tying the previously created values to the relevant job titles.



- Select new performance profile
- Select the job position you are creating the profile for
- Select the number of descriptors (this should be the same as the number of ratings)
- Select save
- The system will open in the performance profiles to begin building



Users will only be able to assign the performance profile to an employee that has been set to the selected post on their current job record.

Users can copy existing profiles as a template to other job roles.

This ensures the section is visible

The system will then display the profiles to be built.

SECTION A : - Accountant

- Click on the + image to add new line
- Click on the X image to remove current line being edited
- Click on the cell to edit the contents
- To record a segment enter data in only the first cell under Descriptors/Criteria column

DESCRIPTORS - CRITERIA ▼	Excellent	Good	Average	Poor	Very Poor	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	X
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	X
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	X
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	X
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	X
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	X

User defined Sections

SECTION B :

SECTION C :

SECTION D :

Label 1

Label 2

Label 3

Add lines

Remove lines from the grid

To tailor the profile, enter, on the right –hand side a list of criteria to then utilise the ratings for:

SECTION A : - Accountant

• Click on the + image to add new line
 • Click on the X image to remove current line being edited
 • Click on the cell to edit the contents
 • To record a segment enter data in only the first cell under Descriptors/Criteria column

DESCRIPTORS - CRITERIA	Excellent	Good	Average	Poor	Very Poor	
Management Skills	Excellent management of team	Effective management of the team	Needs assistance in some areas	Need improvement in managing the team	Does not effectively manage team	X
Leadership and Motivation	Excellent motivator and role model	Effective motivator	Average leadership	Inadequate Ability	Difficult to motivate	X
Team Relations	Promotes a strong team ethic	Very supportive	Generally keen	Limited assistance	Poor assistance	X
Organisational Skills	Excellent organizer of team and workload	Organizes projects in time	Needs assistance	Poor organisational skills	ineffective organisational skills	X
Time Management	Extremely effective	Systematic and logical	Organises self well	Find difficulty organizing self	Unable to plan	X
Planning and achieving results	Sets them-self high standards	Well organized	Only focuses on current project	Needs to have the next project planned	Needs to be pushed	X

User defined Sections

SECTION B :
 SECTION C :
 SECTION D :

Label 1
 Label 2
 Label 3

User defined Sections

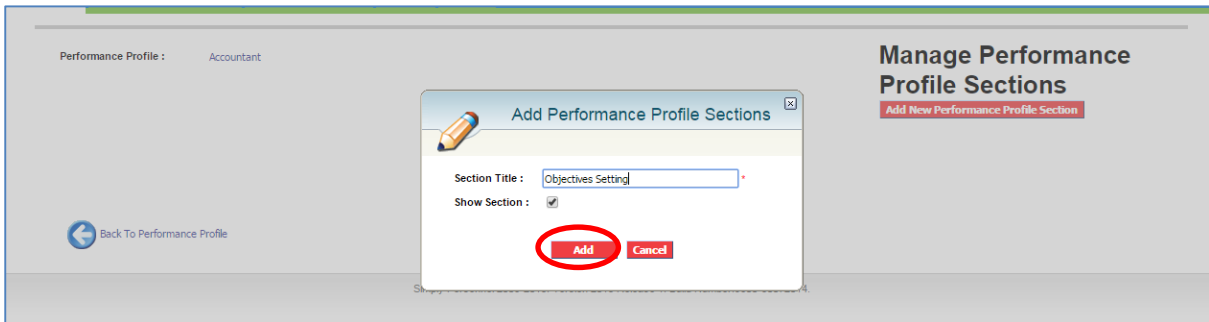
In this section the administrator can define bespoke sections

- Select user defined sections

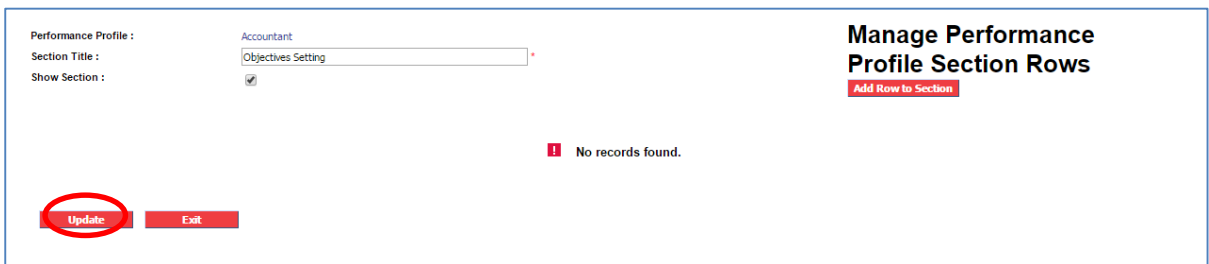
User defined Sections

The user will then be able to add new sections to the performance profile

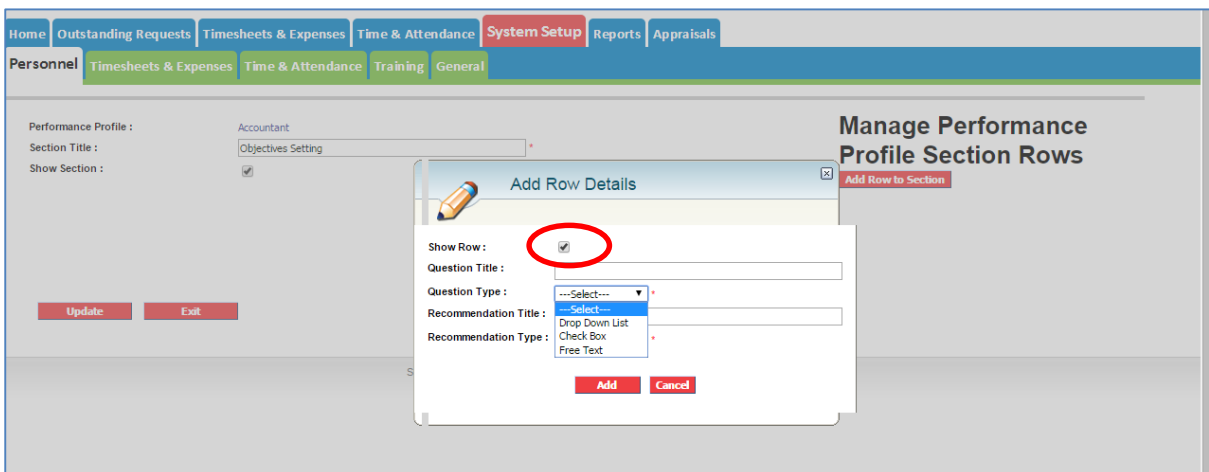
- Select add new performance profiles section
- Enter the title of the section
- Tick to show the section
- Select add



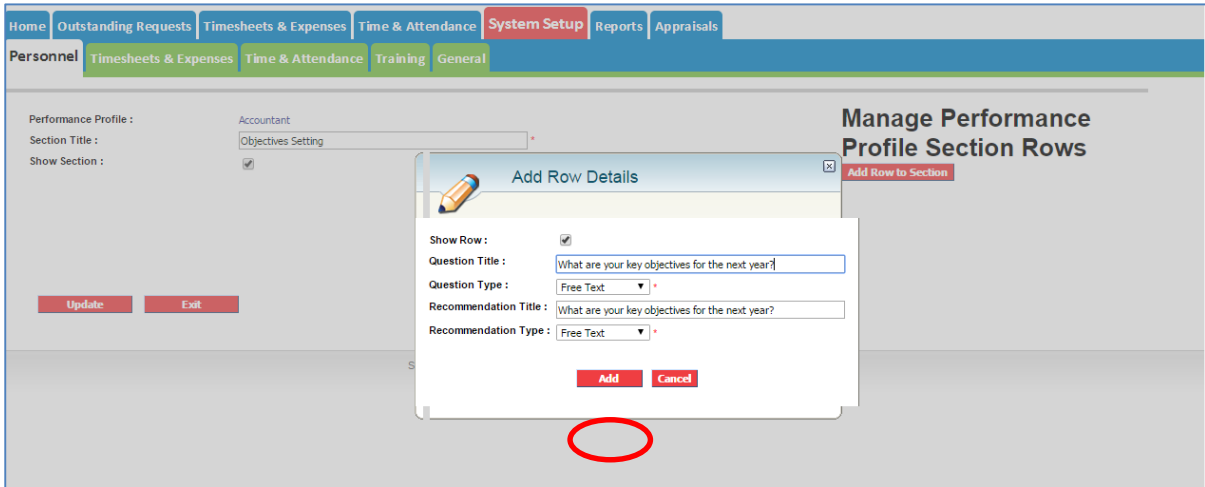
The system will now allow the user to add rows to the newly created section



The user can then add rows to this section with questions and answers sections



- Select add row to section
- Tick to show row and enter the title
- From the question type drop down determine how the question will be answered
- Select add



The screenshot shows the Croner system interface. At the top, there is a navigation bar with tabs for Home, Outstanding Requests, Timesheets & Expenses, Time & Attendance, System Setup, Reports, and Appraisals. Below this is a sub-navigation bar with tabs for Personnel, Timesheets & Expenses, Time & Attendance, Training, and General. The main content area is titled 'Manage Performance Profile Section Rows'. On the left, there is a 'Performance Profile' section with fields for 'Section Title' (set to 'Objectives Setting') and 'Show Section' (checked). There are 'Update' and 'Exit' buttons. A modal dialog box titled 'Add Row Details' is open in the center, containing the following fields: 'Show Row' (checked), 'Question Title' (text input with 'What are your key objectives for the next year?'), 'Question Type' (dropdown menu set to 'Free Text'), 'Recommendation Title' (text input with 'What are your key objectives for the next year?'), and 'Recommendation Type' (dropdown menu set to 'Free Text'). At the bottom of the dialog box are 'Add' and 'Cancel' buttons. A red circle highlights the 'Add' button.

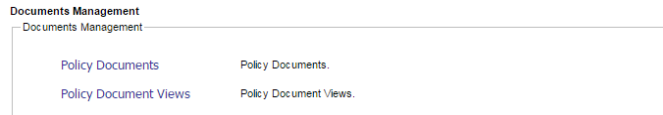


When the user is happy with the section select update to save and then save from the initial screen.

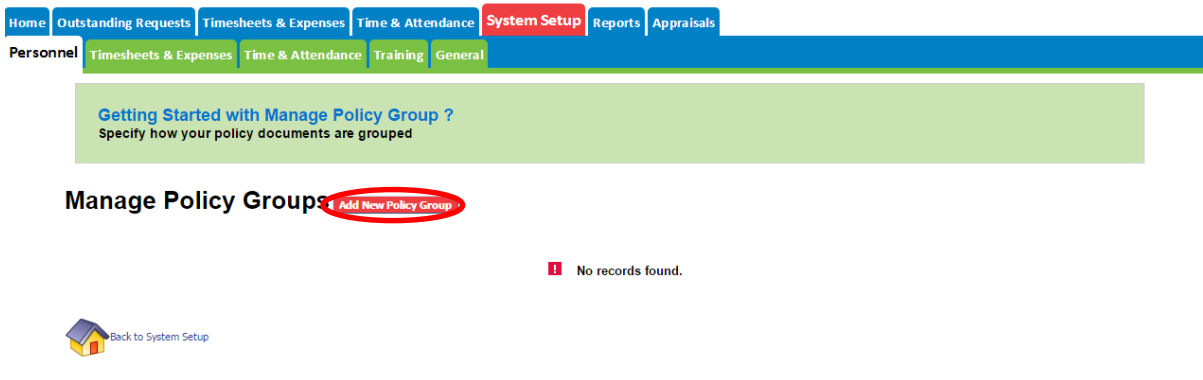
To start the performance profile on a record refer to page 42.

Policy Document Management

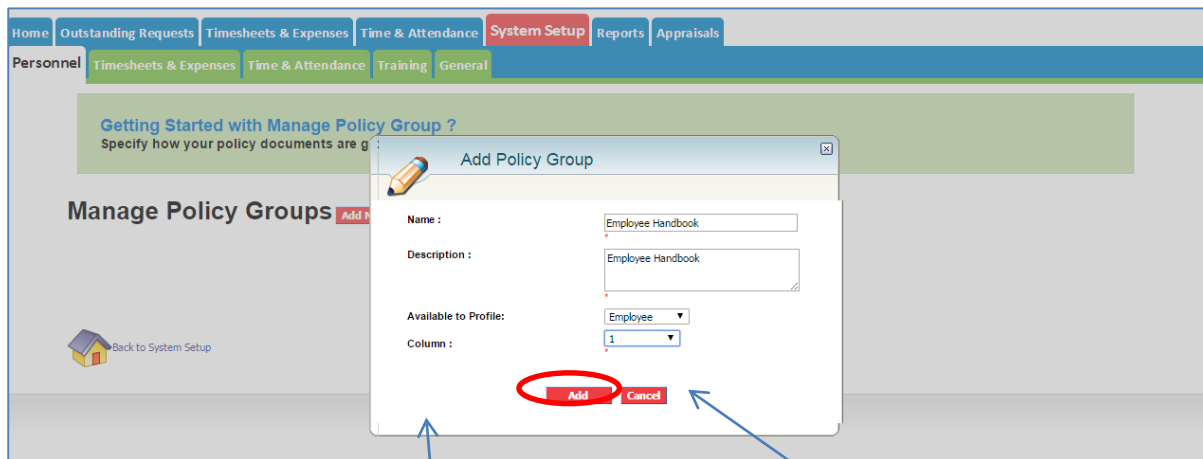
In this section the administrator can upload policies and procedures for the employees to access and download as well as placing a confirmation declaration on the document.



- Select Policy documents
- Add new policy document group to apply a folder structure to the procedures.

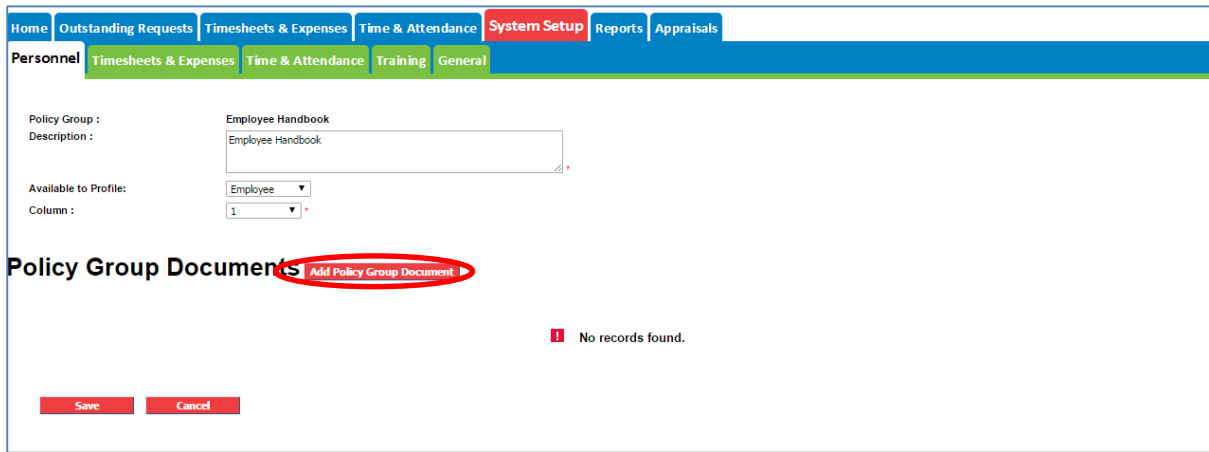


- Enter the name of the Group



There are 3 columns of how the document will sit on the page

Which security profile can access



Home | Outstanding Requests | Timesheets & Expenses | Time & Attendance | **System Setup** | Reports | Appraisals

Personnel | Timesheets & Expenses | Time & Attendance | Training | General

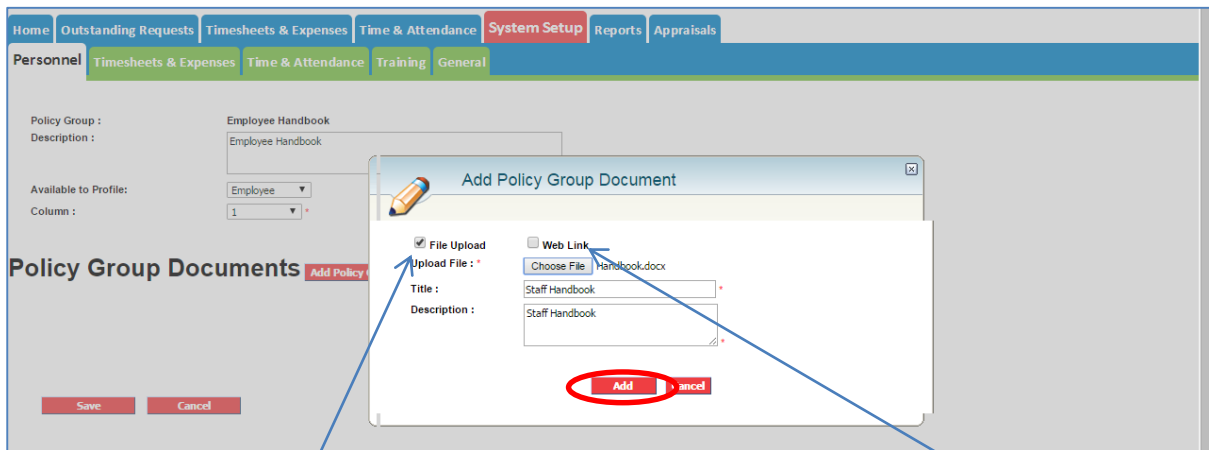
Policy Group : Employee Handbook
 Description : Employee Handbook
 Available to Profile : Employee
 Column : 1

Policy Group Documents **Add Policy Group Document**

No records found.

Save Cancel

- Select add new policy group document
- Either enter the web address or select choose file to browse to the location of the document.
- Select Add



Home | Outstanding Requests | Timesheets & Expenses | Time & Attendance | **System Setup** | Reports | Appraisals

Personnel | Timesheets & Expenses | Time & Attendance | Training | General

Policy Group : Employee Handbook
 Description : Employee Handbook
 Available to Profile : Employee
 Column : 1

Policy Group Documents **Add Policy**

Add Policy Group Document

File Upload Web Link

Upload File : * Choose File Handbook.docx

Title : Staff Handbook
 Description : Staff Handbook

Add Cancel

To upload a physical document.

To place web link to intranet etc.



If there is an error at this point please follow the link below to enable permissions

<https://simplypersonnel.zendesk.com/entries/23002278-Self-Service-Access-to-the-path-C-inetpub-wwwroot-SimplyWebPersonnel-Files-PolicyDocument-1-is-denie>

Policy Name : Employee Handbook Back

General Publish Audit

Current Status

Publish ?

File Upload

The 'Handbook.docx' Document is Currently Published

Upload File : * Choose File No file chosen
A File is already uploaded and can be viewed at Handbook.docx
If you want to set a new File, please select a File above.

Web Link

General Information

Title :

Description :

Current Version Number :

Type :

Size : 12 KB

Created : 30/06/2015 11:36:54 by ADMIN

Last Updated : 30/06/2015 11:36:54 by ADMIN

Save Cancel

This section is where the user will now publish the policy document

- Tick the publish checkbox to ensure document is visible
- Enter a version number

Navigate to the publish tab to enter a declaration and also ensure the job titles are selected as allowed the view or not view the policy.

General Publish Audit

Publish Dates

Publish Date: 30/06/2015
 Enquiry Date: 30/06/2015

Publish Rules

Show new document not viewed in alert window
 Force declaration when on document selection
 Enter Text: I CAN CONFIRM I HAVE READ AND UNDERSTOOD THIS POLICY
 Send email with new document notification

Save

Security

Select All Deselect All

Role	View
Accountant	✓
Admin Director	✓
Administrator	✓
CS Analyst	✓
CS Director	✓
CS Manager	✓
Developer	✓
Development Director	✓
Development Manager	✓
Director of Accounts	✓

This will show the policy as a task

- Tick the box to enable the declaration]
- Enter the text
- Ensure the job titles are allowed to view
- Select save

Policy Name : Employee Handbook **Back**

General Publish Audit

Search Criteria

Logs From : 30/05/2015 Logs To : 30/06/2015
 User Name : [All Users]
 Actions : Uploaded Published Downloaded(Read) Signed As Read

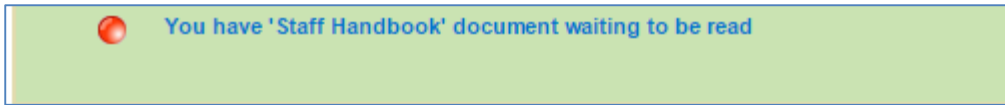
Refresh Results

Audit Log

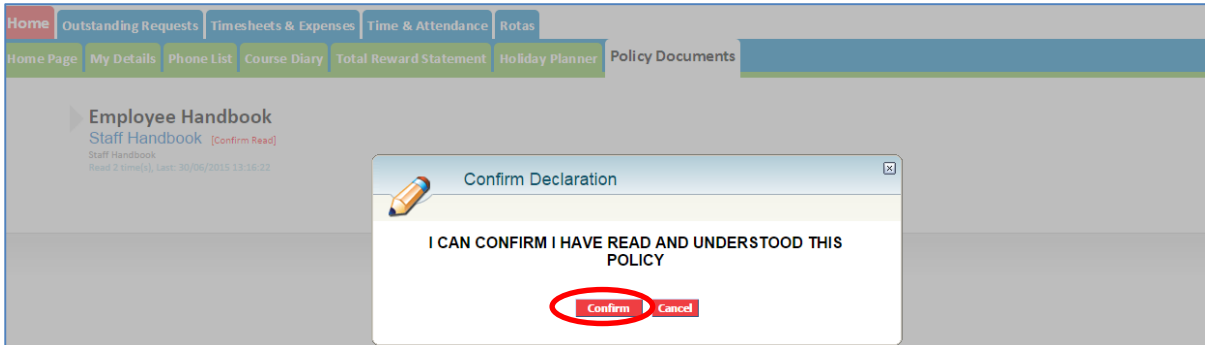
No records found.

In this section the user can run audit reports on the document access.

The user will see the document alert on logon:

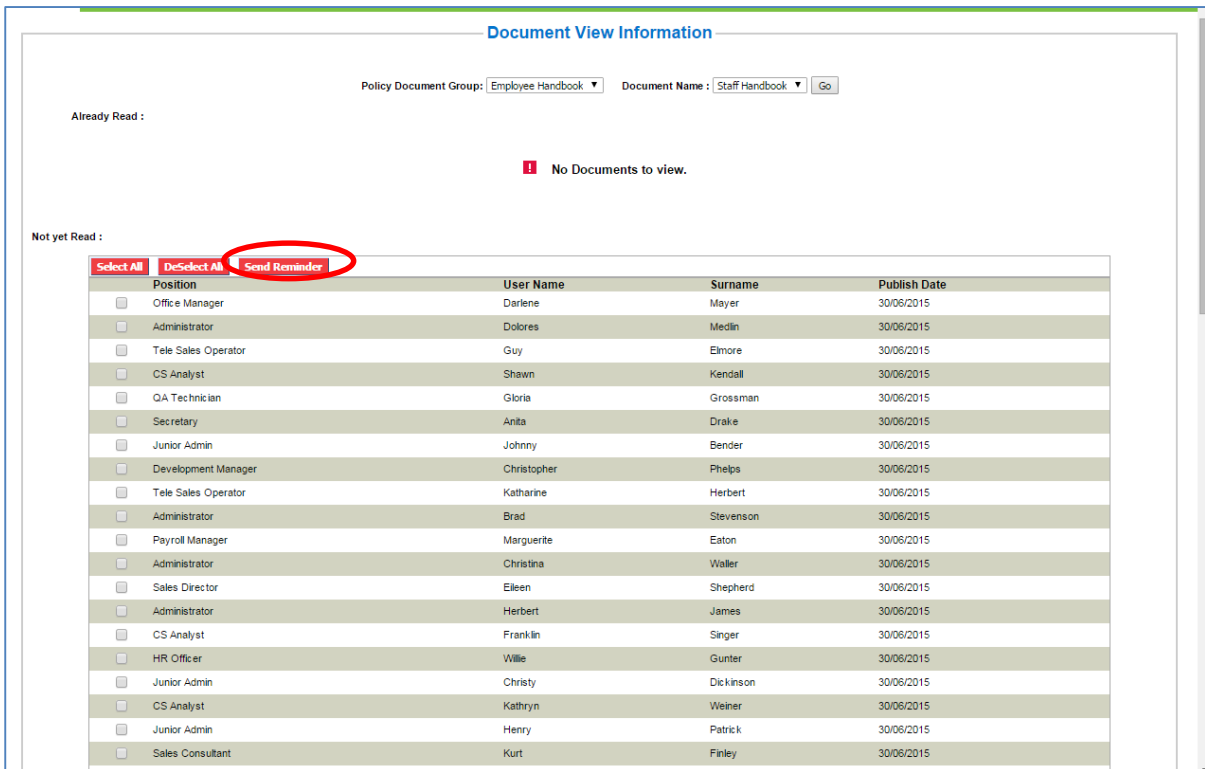


The employee will see the confirmation of the policy once downloaded:



Policy Document Views

Here the user can report on who has read the document and can send a reminder to those not yet read:



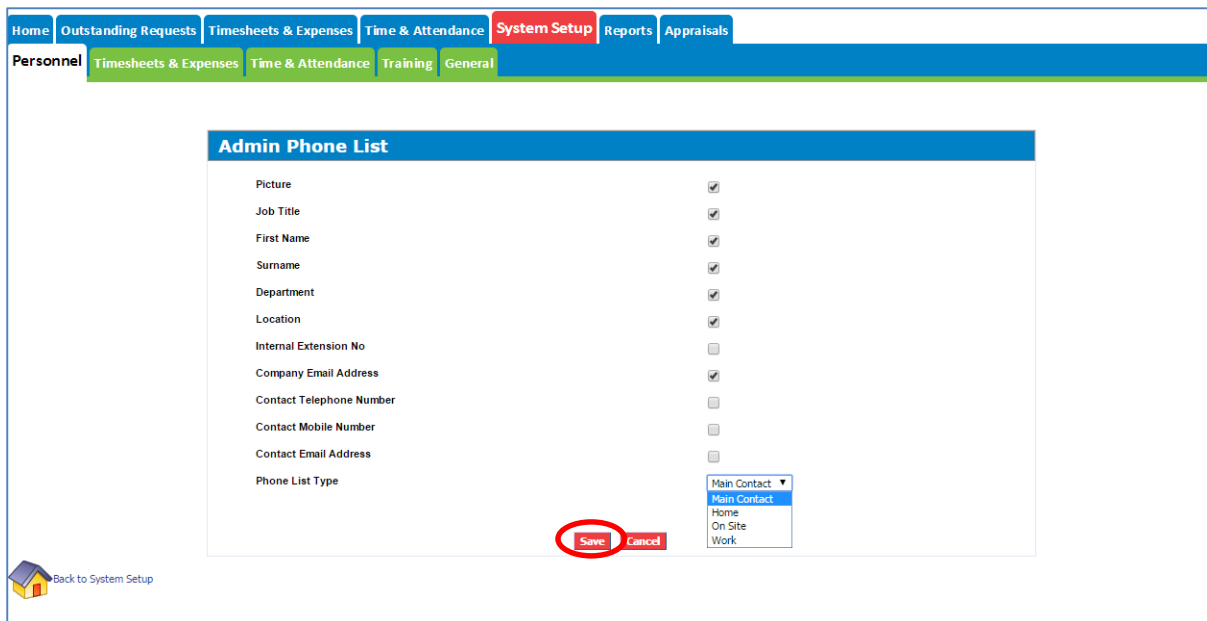
Phone Book Configuration

Phone Book
Phone Book

Phone List Columns Define the columns to show in the phone book.

In this section the user can determine the columns which will show in the phonebook

- Select phone list columns




Home Outstanding Requests Timesheets & Expenses Time & Attendance System Setup Reports Appraisals

Personnel Timesheets & Expenses Time & Attendance Training General

Admin Phone List

Picture	<input checked="" type="checkbox"/>
Job Title	<input checked="" type="checkbox"/>
First Name	<input checked="" type="checkbox"/>
Surname	<input checked="" type="checkbox"/>
Department	<input checked="" type="checkbox"/>
Location	<input checked="" type="checkbox"/>
Internal Extension No	<input type="checkbox"/>
Company Email Address	<input checked="" type="checkbox"/>
Contact Telephone Number	<input type="checkbox"/>
Contact Mobile Number	<input type="checkbox"/>
Contact Email Address	<input type="checkbox"/>
Phone List Type	<input type="button" value="Save"/> <input type="button" value="Cancel"/> Main Contact ▼ <ul style="list-style-type: none"> Main Contact Home On Site Work

 Back to System Setup

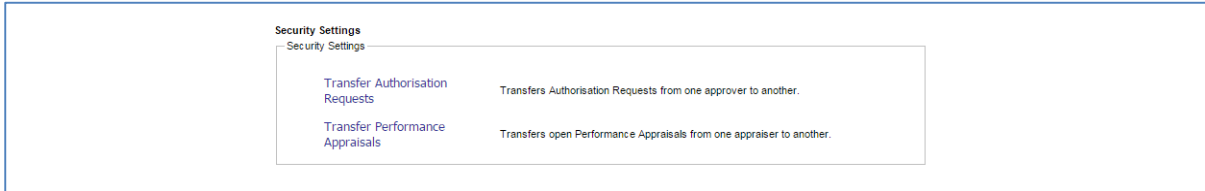
- Tick the columns you wish to have included and the phone list type
- Select save



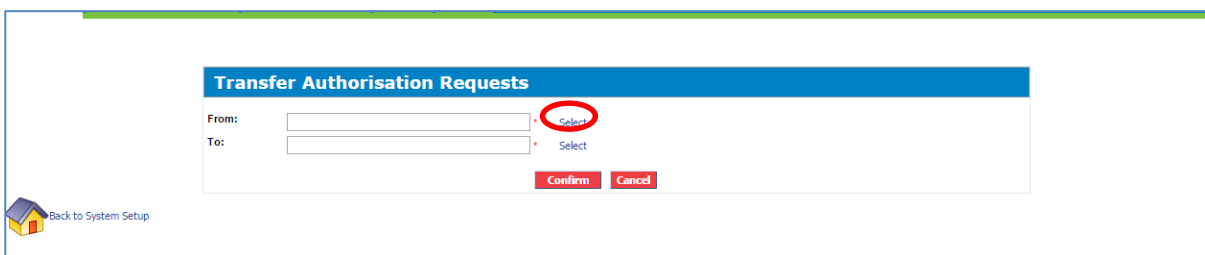
The phone list type will need to exist on the personal page of the employee in order to show

Security Settings

In this section the user can transfer submitting authorisation requests to a temporary authoriser



- Select transfer authorisation requests



















- Click select to choose the approver you are transferring from
- select the blue icon

Employee Search

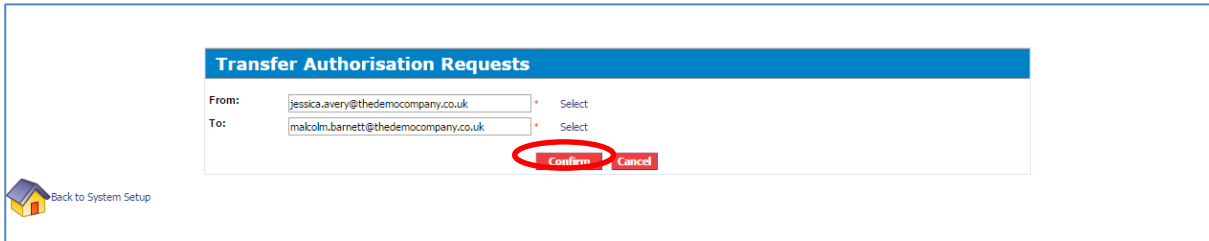
Search

Include Leavers

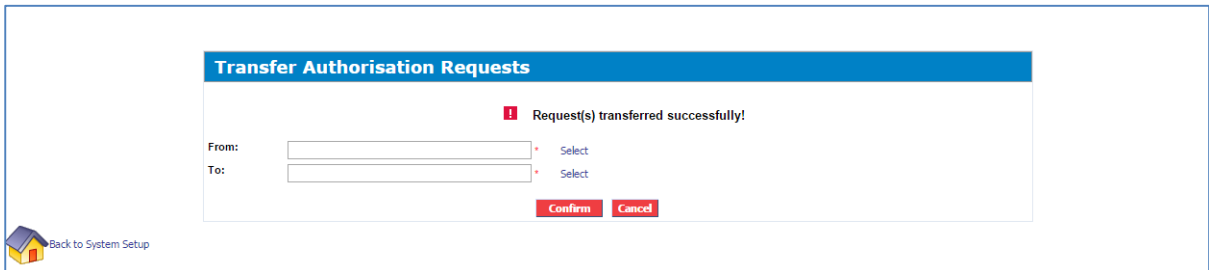
Apply Filter Remove Filter Download

Id	Location	Department	Position	Title	Surname	Forename	
37	Edinburgh	Marketing	Accountant	Mr	Abrams	Thomas	
124563	Head Office	Administration	Secretary	Miss	Avery	Jessica	
72		Sales	Sales Consultant	Miss	Baldwin	Grace	
62		Sales	Sales Director	Mr	Ball	Scott	
102			Testing policy doc		Ball	Scott	
68	Head Office	Human Resources	Office Manager	Miss	Barefoot	Joy	
41	Head Office	Marketing	Marketing Assistant	Mr	Barnett	Malcolm	
33	Head Office	Customer Services	CS Analyst	Miss	Barnett	Vickie	
20	Head Office	Administration	Admin Director	Mrs	Beard	Cindy	
15	Head Office	Administration	Junior Admin	Mr	Bender	Johnny	
80	Head Office	Development	Junior Developer	Mr	Best	Clifford	
65	QA Office	Administration	Secretary	Miss	Black	Leah	
61	Head Office	Finance	Accountant	Mr	Blackburn	Sidney	
669	Edinburgh	Development	Developer		Bobby	Jane	
124564					Bobby	Jim	
668					Bobby	Jim	

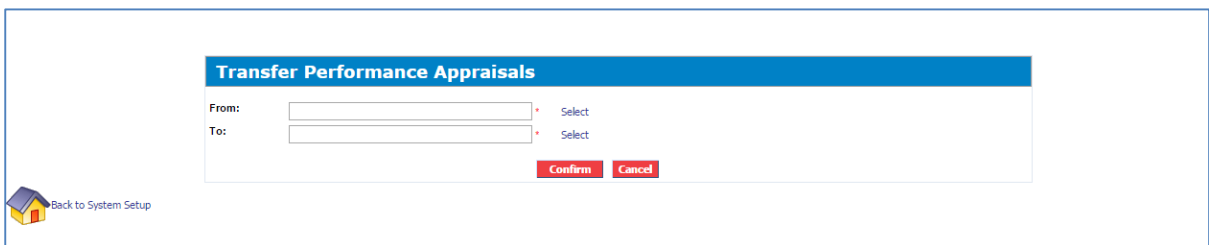
- Click select again to enter the temporary approver
- Then select confirm



- The system will then confirm the transfer



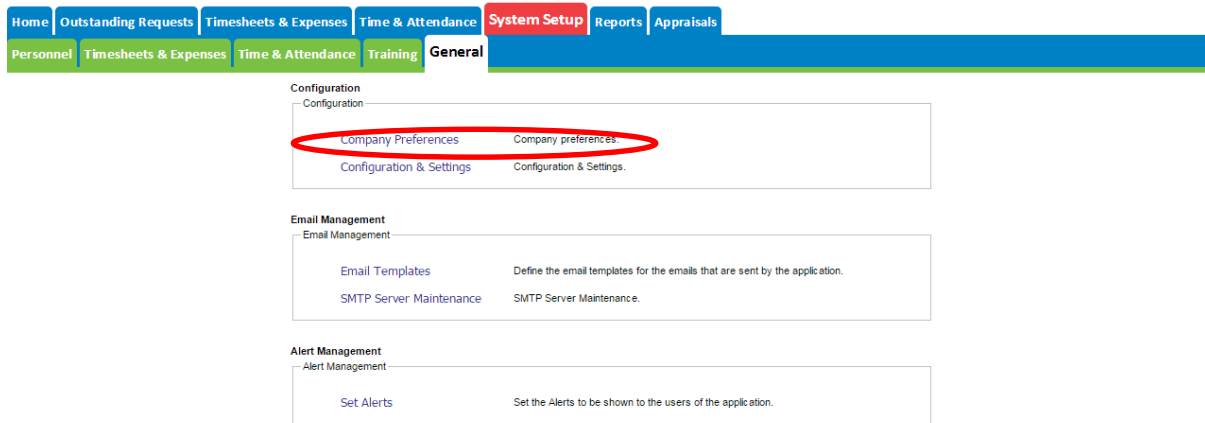
- Follow the same procedure to transfer performance profiles



This is only a temporary submission tool; this will only transfer requests awaiting approval. Future requests will go back to the primary approver.

System Set-up Global settings

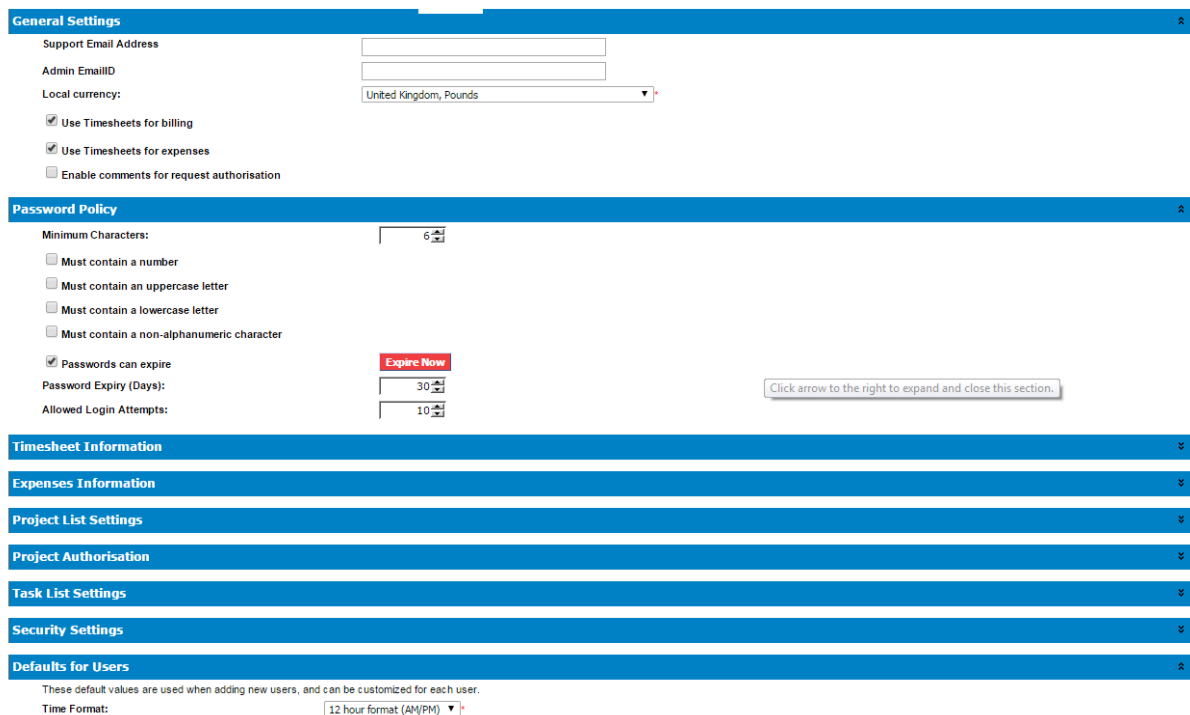
In this section the user can apply settings on mass.



The screenshot shows the 'System Setup' menu with the following items: Home, Outstanding Requests, Timesheets & Expenses, Time & Attendance, System Setup, Reports, Appraisals. Below this is a sub-menu with: Personnel, Timesheets & Expenses, Time & Attendance, Training, General. The 'General' sub-menu is expanded, showing three sections: Configuration, Email Management, and Alert Management. In the Configuration section, 'Company Preferences' and 'Company preferences.' are both circled in red.

Company preferences

This section is where the user can determine password policies and determine in the security section if salaries can display in the employees total reward statement



The screenshot shows the 'General Settings' section with the following fields and options:

- Support Email Address: [Text Input]
- Admin EmailID: [Text Input]
- Local currency: United Kingdom, Pounds (Dropdown)
- Use Timesheets for billing
- Use Timesheets for expenses
- Enable comments for request authorisation

The 'Password Policy' section includes:

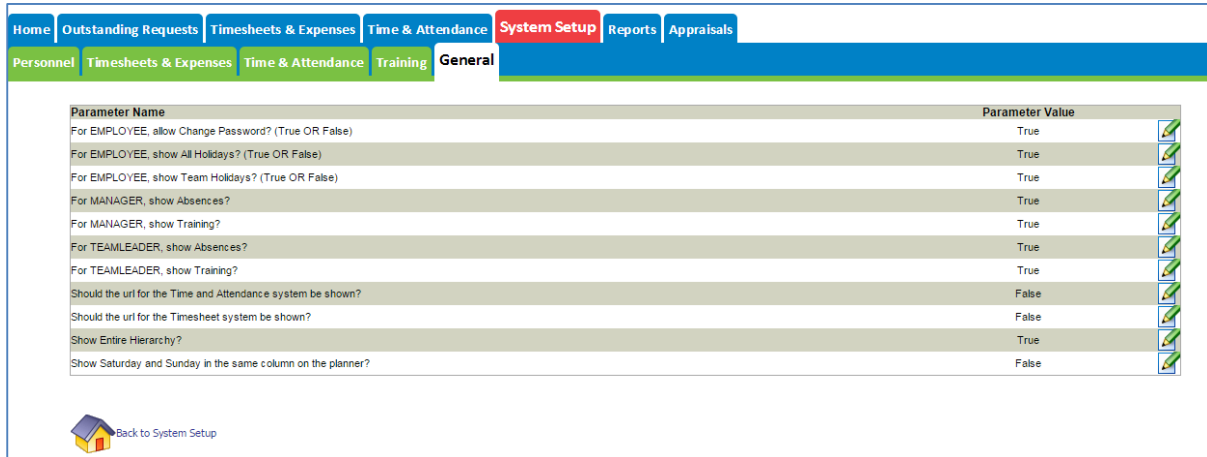
- Minimum Characters: 6 (Spinbox)
- Must contain a number
- Must contain an uppercase letter
- Must contain a lowercase letter
- Must contain a non-alphanumeric character
- Passwords can expire (with an 'Expire Now' button)
- Password Expiry (Days): 30 (Spinbox)
- Allowed Login Attempts: 10 (Spinbox)

Below these sections are several expandable sections: Timesheet Information, Expenses Information, Project List Settings, Project Authorisation, Task List Settings, Security Settings, and Defaults for Users. The 'Defaults for Users' section includes a 'Time Format' dropdown set to '12 hour format (AM/PM)'.












- Scroll down to select update to save

Configuration and settings

In this section the user can configure extra values for the security profiles



The screenshot shows the 'System Setup' menu with the 'General' sub-menu selected. Below the navigation tabs, there is a table of configuration parameters:

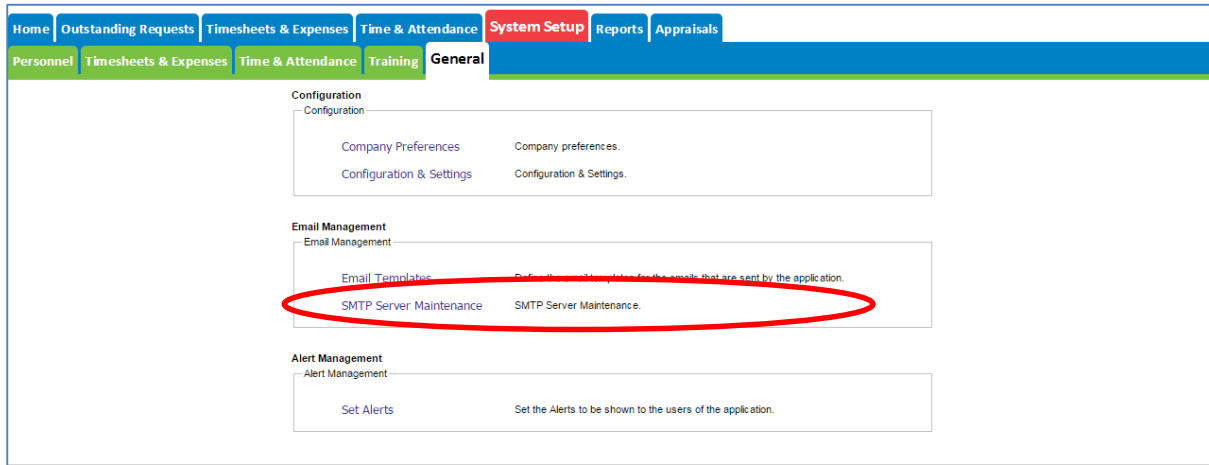
Parameter Name	Parameter Value	
For EMPLOYEE, allow Change Password? (True OR False)	True	
For EMPLOYEE, show All Holidays? (True OR False)	True	
For EMPLOYEE, show Team Holidays? (True OR False)	True	
For MANAGER, show Absences?	True	
For MANAGER, show Training?	True	
For TEAMLEADER, show Absences?	True	
For TEAMLEADER, show Training?	True	
Should the url for the Time and Attendance system be shown?	False	
Should the url for the Timesheet system be shown?	False	
Show Entire Hierarchy?	True	
Show Saturday and Sunday in the same column on the planner?	False	

At the bottom left of the screenshot, there is a 'Back to System Setup' button with a house icon.

- Select the paper and pencil on the section to amend to true/false

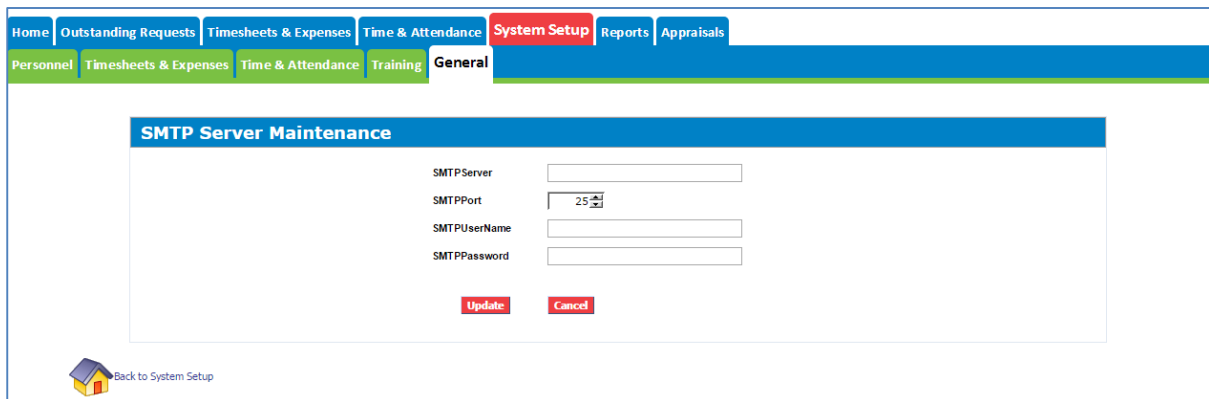
Email Configuration

This section will need to be completed in order for the system to successfully send emails



The screenshot shows the 'System Setup' menu with 'General' selected. Under 'Email Management', the 'SMTP Server Maintenance' option is highlighted with a red circle. Other options include 'Configuration', 'Email Templates', and 'Alert Management'.

- Select SMTP server maintenance



The screenshot shows the 'SMTP Server Maintenance' form with the following fields:

- SMTPServer:
- SMTPPort:
- SMTPUserName:
- SMTPPassword:

Buttons:

[Back to System Setup](#)

- Enter the SMTP server details
- Select update

Email Templates

When a request is made through Self Service, an email will be sent to the appropriate person detailed within the authorisations profile. The administrator has the ability to make amendments to the templates

- Select Email Templates








Home | Outstanding Requests | Timesheets & Expenses | Time & Attendance | **System Setup** | Reports | Appraisals


Personnel | Timesheets & Expenses | Time & Attendance | Training | **General**

Getting Started with Email Templates?
Define the email templates used by the application.

Category: Request Authorisation ▾

[Show Details](#) Apply Filter ▾ Remove Filter ▾ Download

Template Name	Email From	Email Subject	Created Date	
Authorisation Request Approved	[[AuthorisationRequest.ApproverEmail]]	Authorisation Request Approved	12/09/2007 00:00:00	
Authorisation Request Authorised	[[AuthorisationRequest.ApproverEmail]]	Authorisation Request Authorized	12/09/2007 00:00:00	
Authorisation Request Cancelled	[[AuthorisationRequest.OwnerEmail]]	Authorisation Request Cancelled	12/09/2007 00:00:00	
Authorisation Request Maximum Reminder Exceeds	admin@selfservice.com	Authorisation Request Maximum Reminder Exceeds	25/07/2008 15:20:08	
Authorisation Request Rejected	[[AuthorisationRequest.ApproverEmail]]	Authorisation Request Rejected	12/09/2007 00:00:00	
Authorisation Request Reminder	admin@selfservice.com	Authorisation Request Reminder	25/07/2008 00:00:00	
Authorisation Request Submitted	[[AuthorisationRequest.OwnerEmail]]	Authorisation Request Submitted	12/09/2007 00:00:00	

 [Back to System Setup](#)

- To edit the template select the paper and pencil
- Select save when complete

Email Template Details

Name : Authorisation Request Approved

Email From : [[AuthorisationRequest.ApproverEmail]]

Display Name : [[AuthorisationRequest.ApproverName]]

Subject : Authorisation Request Approved

Message :

Tags

Usage: [[Entity.Attribute]]
Example: [[Employee.FirstName]]

AuthorisationRequest

- Date
- Module
- Status
- OwnerName
- OwnerEmail
- OwnerComments
- ApproverName
- ApproverEmail
- ApproverComments

HolidayRequest

User

Employee

Adjustment

Timesheet

Expensesheet

Agency

EmployeeAbsence

Course

PerformanceHeader

PolicyDocumentGroup

Dear [[AuthorisationRequest.OwnerName]].

[[AuthorisationRequest.ApproverName]] has approved your request with the following comments:

[[AuthorisationRequest.ApproverComments]]

Request details:

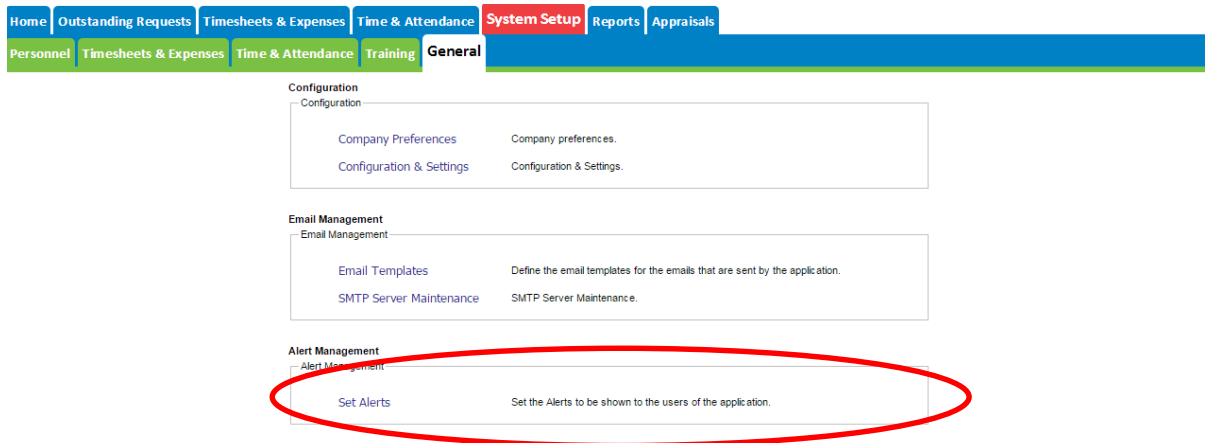
[[AuthorisationRequest.OwnerComments]]



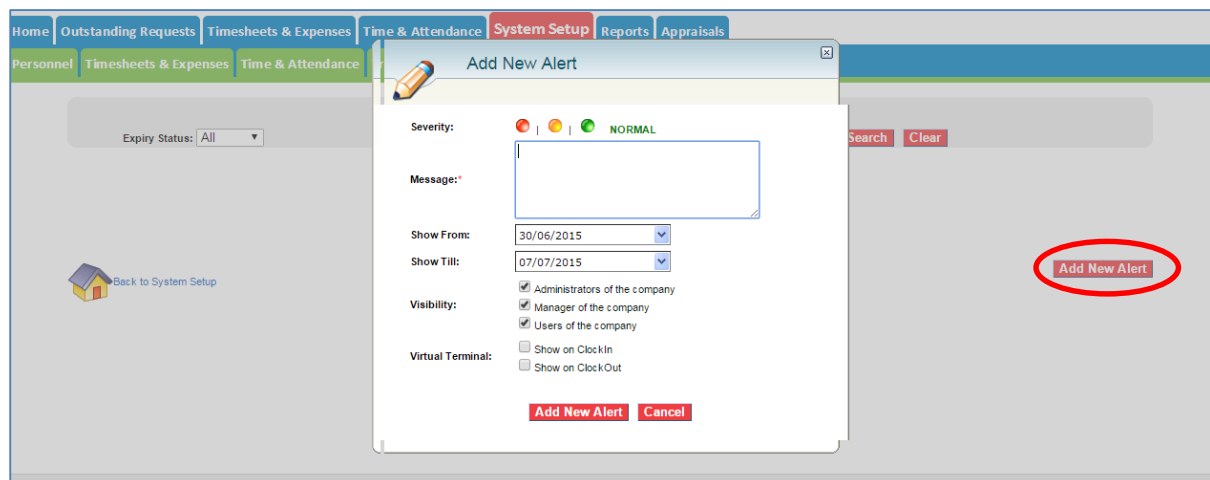
The email templates utilise merge fields to extract the appropriate data making amendments to this could cause data to not send.

Alert Management

The user can use the alert management tool to send bulletins/reminders for a period of time to different user profiles.



- Select set alerts

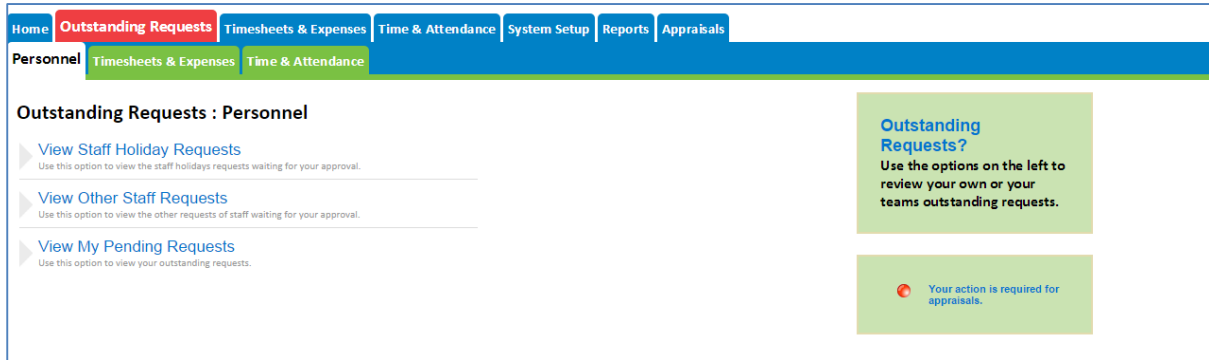


- Select add new alert to display the above
- Select the severity of the alert by selecting the traffic light symbols
- Enter the message
- Select the time frame for the alert to display
- Check the profiles that should see the alert
- Select add new alert

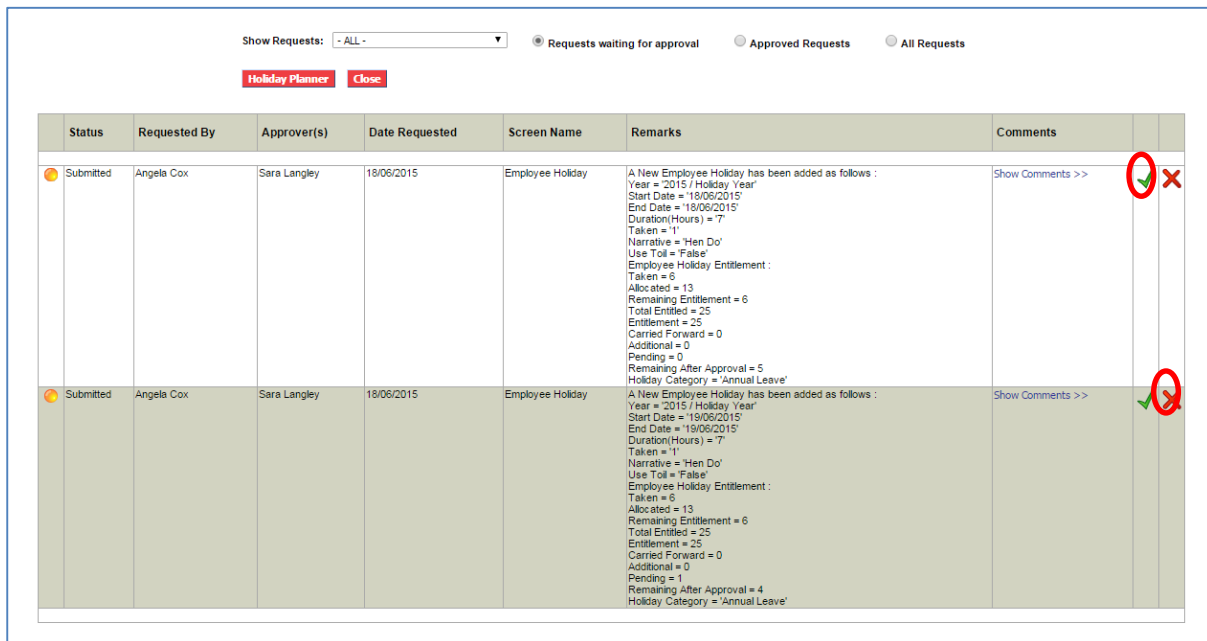
Outstanding requests




When a request has been submitted for approval the authoriser will receive an email notification detailing the request and will also have an alert on the dashboard of Self Service.

The user can simply select from the dashboard or alternatively head to outstanding requests.

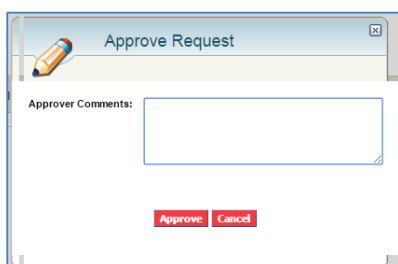


- Select the requests to be viewed



Status	Requested By	Approver(s)	Date Requested	Screen Name	Remarks	Comments
Submitted	Angela Cox	Sara Langley	18/06/2015	Employee Holiday	A New Employee Holiday has been added as follows : Year = '2015' / Holiday Year Start Date = '18/06/2015' End Date = '19/06/2015' Duration(Hours) = '7' Taken = '1' Narrative = 'Hen Do' Use Toll = 'False' Employee Holiday Entitlement : Taken = 6 Allocated = 13 Remaining Entitlement = 6 Total Entitled = 25 Entitlement = 25 Carried Forward = 0 Additional = 0 Pending = 0 Remaining After Approval = 5 Holiday Category = 'Annual Leave'	Show Comments >>  
Submitted	Angela Cox	Sara Langley	18/06/2015	Employee Holiday	A New Employee Holiday has been added as follows : Year = '2015' / Holiday Year Start Date = '19/06/2015' End Date = '19/06/2015' Duration(Hours) = '7' Taken = '1' Narrative = 'Hen Do' Use Toll = 'False' Employee Holiday Entitlement : Taken = 6 Allocated = 13 Remaining Entitlement = 6 Total Entitled = 25 Entitlement = 25 Carried Forward = 0 Additional = 0 Pending = 1 Remaining After Approval = 4 Holiday Category = 'Annual Leave'	Show Comments >> 


























- Select the green tick to approve or the Red Cross to reject and apply a comment this will go back to the requester.




My Department



The admin logon will allow access to all employee records and all sections of the record.

- Select my department
- Select the blue icon on the record to open

Home Outstanding Requests Timesheets & Expenses Time & Attendance System Setup Reports Appraisals							
Home Page My Department Phone List Course Diary Holiday Planner Policy Documents							
Employee Search							
Search							
<input type="checkbox"/> Include Leavers							
Apply Filter Remove Filter 38 Download							
Id	Location	Department	Position	Title	Surname	Forename	
37	Edinburgh	Marketing	Accountant	Mr	Abrams	Thomas	
124563	Head Office	Administration	Secretary	Miss	Avery	Jessica	
72		Sales	Sales Consultant	Miss	Baldwin	Grace	
62		Sales	Sales Director	Mr	Ball	Scott	
102			Testing policy doc		Ball	Scott	
68	Head Office	Human Resources	Office Manager	Miss	Barefoot	Joy	
41	Head Office	Marketing	Marketing Assistant	Mr	Barnett	Malcolm	
33	Head Office	Customer Services	CS Analyst	Miss	Barnett	Vickie	
20	Head Office	Administration	Admin Director	Mrs	Beard	Cindy	
15	Head Office	Administration	Junior Admin	Mr	Bender	Johnny	
80	Head Office	Development	Junior Developer	Mr	Best	Clifford	
65	QA Office	Administration	Secretary	Miss	Black	Leah	
61	Head Office	Finance	Accountant	Mr	Blackburn	Sidney	
669	Edinburgh	Development	Developer		Blobby	Jane	
124564					Blobby	Jim	
668					Bloggs	Joe	
55	Head Office	Finance	Accountant	Mr	Buck	Ben	
78	Head Office	Development	Development Manager	Miss	Carroll	Alexandra	
93	Head Office	Customer Services	CS Manager	Mr	Chang	James	
77	Head Office	Development	Development Manager	Mr	Cho	Leon	
88	Head Office	Development	Development Director	Mr	Christensen	Henry	
91	Head Office	Administration	Administrator	Mrs	Clarke	Kristina	
82			QA Technician	Miss	Cox	Angela	
60	QA Office	Quality Assurance	QA Junior Tech	Miss	Day	Judith	
7	Head Office	Human Resources	HR Manager	Miss	Dean	Jeanette	
28	Head Office	Administration	Junior Admin	Mrs	Dickinson	Christy	
36	Head Office	Administration	Administrator	Mr	Donnelly	Curtis	
54	Head Office	Sales	Sales Consultant	Mr	Dorsey	Warren	

- The user will be greeted with the employees Self Service account

First Name: Thomas
Last Name: Abrams
Reports To: Jessica Avery
Primary Project Manager:
Other Project :
Location: 180 Brougham Road, Demothorpe, North Demoshire, DT13 7KH 
Date Commenced: 18/03/2002 (13 year(s) 3 month(s) 12 day(s))

 07470 897207
 01234 833478
 thomas.abrams@thedemocompany.co.uk

Personal
Attendance
Work
Skills/Appraisals
Training
Documents

Employee Details
Address Details
Emergency Contact Details
Employee Picture

Main Details

Employee ID
Surname
Forename
Other Names
Known As
Title
Gender Male Female

Personal Details

Start Date
NI Number
Date Of Birth 43 year(s), 8 month(s), 25 day(s)
Nationality
Ethnic Origin
Religion

Marital Status
Dependants
Home Status
 Registered Disabled

Save

Selecting the top blue tabs will determine the green tabs below


Attendance

Personal
Attendance
Work
Skills/Appraisals
Training
Documents

Holiday Details
Holiday Planner
Absence Details

Book holiday

Your holiday entitlement



■ Taken:	8.00
■ Allocated:	10.00
■ Remaining Entitlement:	-4.00
Total Entitled:	14.00
Entitlement:	12.00
Carried Forward:	0.00
TOIL:	2.00
Pending:	0.00

Selected Year Holiday Year/2015 Book holiday

Status	Start Date	End Date	Taken	Narrative	Authoriser(s)	Download
●	19/10/2015	23/10/2015	5.00			✎ ✖
●	30/07/2015	05/08/2015	5.00			✎ ✖
● APPROVED	10/06/2015	10/06/2015	1.00		Jessica Avery	✎ ✖
●	03/06/2015	03/06/2015	1.00			✎ ✖
● APPROVED	03/06/2015	03/06/2015	1.00		Jessica Avery	✎ ✖
●	02/06/2015	02/06/2015	1.00			✎ ✖
● APPROVED	02/06/2015	02/06/2015	1.00		Jessica Avery	✎ ✖
● APPROVED	01/06/2015	01/06/2015	1.00		Jessica Avery	✎ ✖
●	22/05/2015	22/05/2015	0.50	test		✎ ✖
● APPROVED	05/05/2015	06/05/2015	1.50		Jessica Avery	✎ ✖

Book holiday

Thomas Abrams (37)

First Name:	Thomas		📞 07470 897207
Last Name:	Abrams		📠 01234 833478
Reports To:	Jessica Avery ✔		✉ thomas.abrams@thedemocompany.co.uk
Primary Project Manager:			
Other Project :			
Location:	180 Brougham Road, Demothorpe, North Demshire, DT13 7KH		
Date Commenced:	18/03/2002 (13 year(s) 3 month(s) 12 day(s))		

Personal
Attendance
Work
Skills/Appraisals
Training
Documents

Job Details
Salary Details
Bank Details
Notes

Job History

Date From	Date To	Post	Department	Location	Pay	Notes	Download
11/06/2015		Accountant	Marketing	Edinburgh	18,000.00		✎ ✖
18/03/2002	10/06/2015	Administrator	Marketing		18,000.00		✎ ✖

Add New Job

Performance Profile

This section will detail starting a performance profile.

Thomas Abrams (37)

First Name: Thomas
 Last Name: Abrams
 Reports To: Jessica Avery
 Primary Project Manager:
 Other Project :
 Location: 180 Brougham Road, Demothorpe, North Demoshire, DT13 7KH
 Date Commenced: 18/03/2002 (13 year(s) 3 month(s) 12 day(s))

07470 897207
01234 833478
thomas.abrams@thedemocompany.co.uk

Personal Attendance Work Skills/Appraisals Training Documents
 Qualifications CPD Basic Appraisals Performance Profiles

Performance Reviews

Profile	AppraisalDate	Appraiser	Started	Sent To Appraiser	Sent To Appraiser	SignOff	Status	Download
Administrator	29/05/2015	Avery	29/05/2015			29/05/2015	Agreed & Completed	Download

[New Performance Review](#)

- Select New performance review

Thomas Abrams (37)

First Name: Thomas
 Last Name: Abrams
 Reports To: Jessica Avery
 Primary Project Manager:
 Other Project :
 Location: 180 Brougham Road, Demothorpe, North Demoshire, DT13 7KH
 Date Commenced: 18/03/2002 (13 year(s) 3 month(s) 12 day(s))

07470 897207
01234 833478
thomas.abrams@thedemocompany.co.uk

Personal Attendance Work Skills/Appraisals Training Documents
 Qualifications CPD Basic Appraisals Performance Profiles

Add New Performance Profile

Performance Profile: Accountant
 Appraisal Date: 30/06/2015
 Appraiser: Jessica Avery

[Create](#) [Cancel](#)

- Enter the Appraiser name
- Select create

SECTION A		PERFORMANCE RATING - Accountant				DATE: 30/06/2015
APPRAISEE: Thomas Abrams		APPRAISER: Jessica Avery				
<input checked="" type="checkbox"/> Show Appraisee's Comments						
DESCRIPTOR CRITERIA	Excellent	Good	Average	Poor	Very Poor	JUSTIFICATION / COMMENTS
Management Skills	Excellent management of team	Effective management of the team	Needs assistance in some areas	Need improvement in managing the team	Does not effectively manage team	abc ✓
Leadership and Motivation	Excellent motivator and role model	Effective motivator	Average leadership	Inadequate Ability	Difficult to motivate	abc ✓
Team Relations	Promotes a strong team ethic	Very supportive	Generally keen	Limited assistance	Poor assistance	abc ✓
Organisational Skills	Excellent organizer of team and workload	Organizes projects in time	Needs assistance	Poor organisational skills	ineffective organisational skills	abc ✓
Time Management	Extremely effective	Systematic and logical	Organises self well	Find difficulty organizing self	Unable to plan	abc ✓
Planning and achieving results	Sets them-self high standards	Well organized	Only focuses on current project	Needs to have the next project planned	Needs to be pushed	abc ✓

User Defined Section

Objectives Setting			
<input checked="" type="checkbox"/> Show Appraisee's Comments			
What are your key objectives for the next year?	abc ✓	What are your key objectives for the next year?	abc ✓
How do you intend to achieve the objectives detailed?	abc ✓	How do you intend to achieve the objectives detailed?	abc ✓
How can your manager help?	abc ✓	How can your manager help?	abc ✓
What resource is available?	abc ✓	What resource is available?	abc ✓

Priority Setting and additional comments

SECTION B : Objectives

No.	Objective	Relevance to Achievement of Business Plan	Action Needed for Achievement	Priority	Target Date
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="▼"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>	High Low	<input type="text"/>
3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="▼"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="▼"/>	<input type="text"/>

+

- Click on the + image to add a new line
- Click on the cell to edit the contents

SECTION C : Action

No.	Development Need	Action Needed for Achievement	Objective/s to be Impacted	Resources Required	Priority	Target Date
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="▼"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="▼"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="▼"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="▼"/>	<input type="text"/>

+

- Click on the + image to add a new line
- Click on the cell to edit the contents

SECTION D : REVIEW RECORD

Show Appraisee's Comments

Additional Reviewer comments

abc ✓

Employee Comments

abc ✓

Saving the review

SECTION D : REVIEW RECORD

Show Appraisee's Comments

Additional Reviewer comments

abc ✓

Employee Comments

abc ✓

What needs to be done prior to next appraisal

abc ✓

Date of Next Appraisal:

Sign Off
Save & Finish for now
Save & Send to Appraisee
Cancel

Phone List

Home
Outstanding Requests
Timesheets & Expenses
Time & Attendance
System Setup
Reports
Appraisals

Home Page
My Department
Phone List
Course Diary
Holiday Planner
Policy Documents

Phone Search

Forename Surname Search

Download

Job Title	First Name	Surname ▼	Company Email	Department	Location
Accountant	Thomas	Abrams	thomas.abrams@thedemocompany.co.uk	Marketing	Edinburgh
Secretary	Jessica	Avery	jessica.avery@thedemocompany.co.uk	Administration	Head Office
Sales Consultant	Grace	Baldwin	grace.baldwin@thedemocompany.co.uk	Sales	
Sales Director	Scott	Ball	scott.ball@thedemocompany.co.uk	Sales	
Testing policy doc	Scott	Ball			
Office Manager	Joy	Barefoot	joy.barefoot@thedemocompany.co.uk	Human Resources	Head Office
CS Analyst	Vickie	Barnett	vickie.barnett@thedemocompany.co.uk	Customer Services	Head Office
Marketing Assistant	Malcolm	Barnett	malcolm.barnett@thedemocompany.co.uk	Marketing	Head Office
Admin Director	Cindy	Beard	cindy.beard@thedemocompany.co.uk	Administration	Head Office
Junior Admin	Johnny	Bender	johnny.bender@thedemocompany.co.uk	Administration	Head Office
Junior Developer	Clifford	Best	clifford.best@thedemocompany.co.uk	Development	Head Office
Secretary	Leah	Black	leah.black@thedemocompany.co.uk	Administration	QA Office
Accountant	Sidney	Blackburn	sidney.blackburn@thedemocompany.co.uk	Finance	Head Office
Developer	Jane	Blobby	janeblobby@fake.com	Development	Edinburgh
	Jim	Blobby			
	Joe	Bloggs	joe@fake.com		
Accountant	Ben	Buck	ben.buck@thedemocompany.co.uk	Finance	Head Office
Development Manager	Alexandra	Carroll	alexandra.carroll@thedemocompany.co.uk	Development	Head Office
CS Manager	James	Chang	james.chang@thedemocompany.co.uk	Customer Services	Head Office
Development Manager	Leon	Cho	leon.cho@thedemocompany.co.uk	Development	Head Office
Development Director	Henry	Christensen	henry.christensen@thedemocompany.co.uk	Development	Head Office
Administrator	Kristina	Clarke	kristina.clarke@thedemocompany.co.uk	Administration	Head Office
QA Technician	Angela	Cox	angela.cox@thedemocompany.co.uk		
QA Junior Tech	Judith	Day	judith.day@thedemocompany.co.uk	Quality Assurance	QA Office
HR Manager	Jeanette	Dean	jeanette.dean@thedemocompany.co.uk	Human Resources	Head Office
Junior Admin	Christy	Dickinson	christy.dickinson@thedemocompany.co.uk	Administration	Head Office
Administrator	Curtis	Donnelly	curtis.donnelly@thedemocompany.co.uk	Administration	Head Office
Sales Consultant	Warren	Dorsey	warren.dorsey@thedemocompany.co.uk	Sales	Head Office
Secretary	Anita	Drake	anita.drake@thedemocompany.co.uk	Administration	QA Office

Holiday Planner

Here the administrator can utilise the company attendance planner for courses, holidays and absences.

[Home](#) | [Outstanding Requests](#) | [Timesheets & Expenses](#) | [Time & Attendance](#) | [System Setup](#) | [Reports](#) | [Appraisals](#)
[Home Page](#) | [My Department](#) | [Phone List](#) | [Course Diary](#) | **Holiday Planner** | [Policy Documents](#)

Holiday Planner
 Location: **cabon** (dropdown) | Department: **- ALL -** (dropdown) | Date: **30/06/2015** (dropdown) | Show Holidays | Show Absences | Show Courses | **Show**
 Show Cancelled And Rejected Requests
 Day View | Week View | Month View

Mon	Tue	Wed	Thu	Fri	Sat	Sun
Christopher Phelps (AU) Adam Shaffer (AUTHOR) Leah Black (AUTHORISE) Clarence West (AUTHOR)	Christopher Phelps (AU) Adam Shaffer (AUTHOR) Clarence West (AUTHOR) Ronnie Hogan (AUTHOR)	Christopher Phelps (AU) Adam Shaffer (AUTHOR) Clarence West (AUTHOR) Ronnie Hogan (AUTHOR)	Adam Shaffer (AUTHOR) Clarence West (AUTHOR) Ronnie Hogan (AUTHOR) Clifford Best (AUTHOR)	Adam Shaffer (AUTHOR) Clarence West (AUTHOR) Ronnie Hogan (AUTHOR) Clifford Best (AUTHOR)	Clarence West (AUTHOR) Phyllis Schultz (AUTHOR) Clifford Best (AUTHOR)	Clarence West (AUTHOR) Phyllis Schultz (AUTHOR) Clifford Best (AUTHOR)
Clarence West (AUTHOR) Ronnie Hogan (AUTHOR) Clifford Best (AUTHOR) Phyllis Schultz (AUTHOR)	Clifford Best (AUTHOR) Phyllis Schultz (AUTHOR) William Talley (AUTHOR) Norman Olsen (AUTHOR)	Clifford Best (AUTHOR) Phyllis Schultz (AUTHOR) William Talley (AUTHOR) Norman Olsen (AUTHOR)	Norman Olsen (AUTHOR) Leon Cho (AUTHORISED) Michelle Han (AUTHOR)	Leon Cho (AUTHORISED) Michelle Han (AUTHOR) Josephine Jensen (AUTHOR) Glenda Johnston (AUTHOR)	Michelle Han (AUTHORISED) Josephine Jensen (AUTHOR) Glenda Johnston (AUTHOR)	Michelle Han (AUTHORISED) Josephine Jensen (AUTHOR) Glenda Johnston (AUTHOR)
Michelle Han (AUTHOR) Josephine Jensen (AUTHOR) Glenda Johnston (AUTHOR) Dean Fink (AUTHORISE)	Michelle Han (AUTHOR) Josephine Jensen (AUTHOR) Glenda Johnston (AUTHOR) Dean Fink (AUTHORISE)	Josephine Jensen (AUTHOR) Dean Fink (AUTHORISE) Christopher Phelps (AUTHOR) Thomas Abrams (AUTHOR)	Josephine Jensen (AUTHOR) Dean Fink (AUTHORISE)	Josephine Jensen (AUTHOR) Dean Fink (AUTHORISE) Franklin Boswell (AUTHOR)	Dean Fink (AUTHORISED) Franklin Boswell (AUTHOR)	Dean Fink (AUTHORISED) Franklin Boswell (AUTHOR)
Dean Fink (AUTHORISE) Franklin Boswell (AUTHOR) Lynn Morris (AUTHORISE) Herbert James (AUTHOR)	Dean Fink (AUTHORISE) Franklin Boswell (AUTHOR) Lynn Morris (AUTHORISE) Herbert James (AUTHOR)	Dean Fink (AUTHORISE) Franklin Boswell (AUTHOR) Lynn Morris (AUTHORISE) Herbert James (AUTHOR)	Dean Fink (AUTHORISE) Franklin Boswell (AUTHOR) Lynn Morris (AUTHORISE) Herbert James (AUTHOR)	Dean Fink (AUTHORISE) Franklin Boswell (AUTHOR) Lynn Morris (AUTHORISE) Herbert James (AUTHOR)	Kathryn Weiner (AUTHOR) Alexandra Carroll (AUTHOR) Sara Langley (AUTHORISE)	Kathryn Weiner (AUTHOR) Alexandra Carroll (AUTHOR) Sara Langley (AUTHORISE)
Kathryn Weiner (AUTHOR) Alexandra Carroll (AUTHOR) Sara Langley (AUTHOR) Marguerite Eaton (AUTHOR) Guy Elmore (AUTHORISE)	Kathryn Weiner (AUTHOR) Sara Langley (AUTHOR) Marguerite Eaton (AUTHOR) Guy Elmore (AUTHORISE)	Kathryn Weiner (AUTHOR) Sara Langley (AUTHOR) Marguerite Eaton (AUTHOR) Guy Elmore (AUTHORISE)	Kathryn Weiner (AUTHOR) Sara Langley (AUTHOR) Marguerite Eaton (AUTHOR) Guy Elmore (AUTHORISE)	Sara Langley (AUTHOR) Marguerite Eaton (AUTHOR) Guy Elmore (AUTHORISE) Jeanette Dean (AUTHOR)	Marguerite Eaton (AUTHOR) Guy Elmore (AUTHORISE) Jeanette Dean (AUTHOR) Lynn Morris (AUTHORISE)	Marguerite Eaton (AUTHOR) Guy Elmore (AUTHORISE) Jeanette Dean (AUTHOR) Lynn Morris (AUTHORISE)
Marguerite Eaton (AUTHOR) Guy Elmore (AUTHORISE) Jeanette Dean (AUTHOR) Tammie McLean (AUTHOR) Lynn Morris (AUTHORISE)	Marguerite Eaton (AUTHOR) Guy Elmore (AUTHORISE) Jeanette Dean (AUTHOR) Tammie McLean (AUTHOR) Lynn Morris (AUTHORISE)	Guy Elmore (AUTHORISE) Jeanette Dean (AUTHOR) Tammie McLean (AUTHOR) Calvin Gates (AUTHOR)	Guy Elmore (AUTHORISE) Jeanette Dean (AUTHOR) Tammie McLean (AUTHOR) Calvin Gates (AUTHOR)	Guy Elmore (AUTHORISE) Jeanette Dean (AUTHOR) Tammie McLean (AUTHOR) Calvin Gates (AUTHOR)	Sara Langley (AUTHOR) Stephanie Rice (AUTHOR) Carl Flynn (AUTHORISE) Franklin Sinner (AUTHOR)	Sara Langley (AUTHOR) Stephanie Rice (AUTHOR) Carl Flynn (AUTHORISE) Franklin Sinner (AUTHOR)

- Utilize the filters to display certain dates/departments
- To view all holiday on one day double click the day

Selected Date: 18/06/2015

Surname	Forename	Department	Location	Reason	Start Date	End Date	Duration	Notes	Status
Beard	Cindy	Administration	Head Office	Holiday	18/06/2015	19/06/2015	2		AUTHORISED
James	Herbert	Administration	Head Office	Holiday	15/06/2015	19/06/2015	5		AUTHORISED
Weiner	Kathryn	Customer Services	Head Office	Holiday	18/06/2015	25/06/2015	6		AUTHORISED
Black	Leah	Administration	QA Office	Holiday	18/06/2015	19/06/2015	2		AUTHORISED
Fink	Dean	Quality Assurance	QA Office	Holiday	08/06/2015	19/06/2015	10		AUTHORISED
Morris	Lynn	Development	Head Office	Holiday	15/06/2015	19/06/2015	5		AUTHORISED
Boswell	Franklin	Sales	Head Office	Holiday	12/06/2015	19/06/2015	6		AUTHORISED
Cox	Angela			Holiday	18/06/2015	18/06/2015	1	Hen Do	SUBMITTED

Course Diary

In this section an administrator can view any courses for the month that have been scheduled within the Training Manager module.

Course Diary

Course Code: ---ALL--- Start Date: Show all courses Show

Description: ---ALL--- End Date: Show only courses where my team are booked onto

Day View
 Week View
 Month View

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

- Double selecting the day the course is due will allow the user to see the delegates booked onto the course.

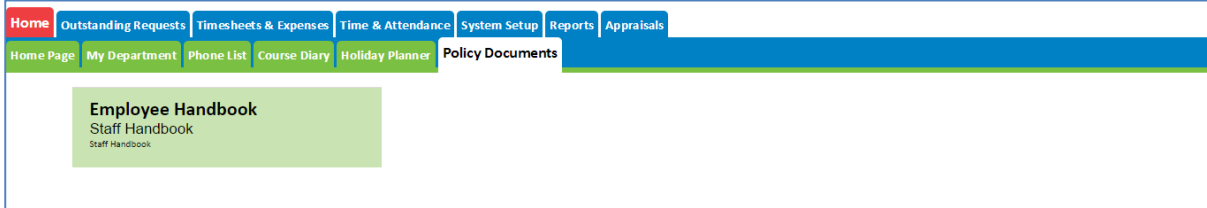
Selected Date: 07/07/2015

Course Status: Scheduled

Start Date	End Date	Start Time	End Time	Course Code	Description	Employee	Notes	Course Location	Status
07/07/2015	07/07/2015			MS Office	MS Office-Excel	Abrams Thomas (thomas.abrams@thedemocompany.co.uk)			Scheduled
07/07/2015	07/07/2015			MS Office	MS Office-Excel	Avery Jessica (jessica.avery@thedemocompany.co.uk)			Scheduled
07/07/2015	07/07/2015			MS Office	MS Office-Excel	Ball Scott (scott.ball@thedemocompany.co.uk)			Scheduled
07/07/2015	07/07/2015			MS Office	MS Office-Excel	Barefoot Joy (joy.barefoot@thedemocompany.co.uk)			Scheduled
07/07/2015	07/07/2015			MS Office	MS Office-Excel	Barnett Vickie (vickie.barnett@thedemocompany.co.uk)			Scheduled

Policy Documents

Once the Administrator has successfully uploaded the policy documents they will display as below



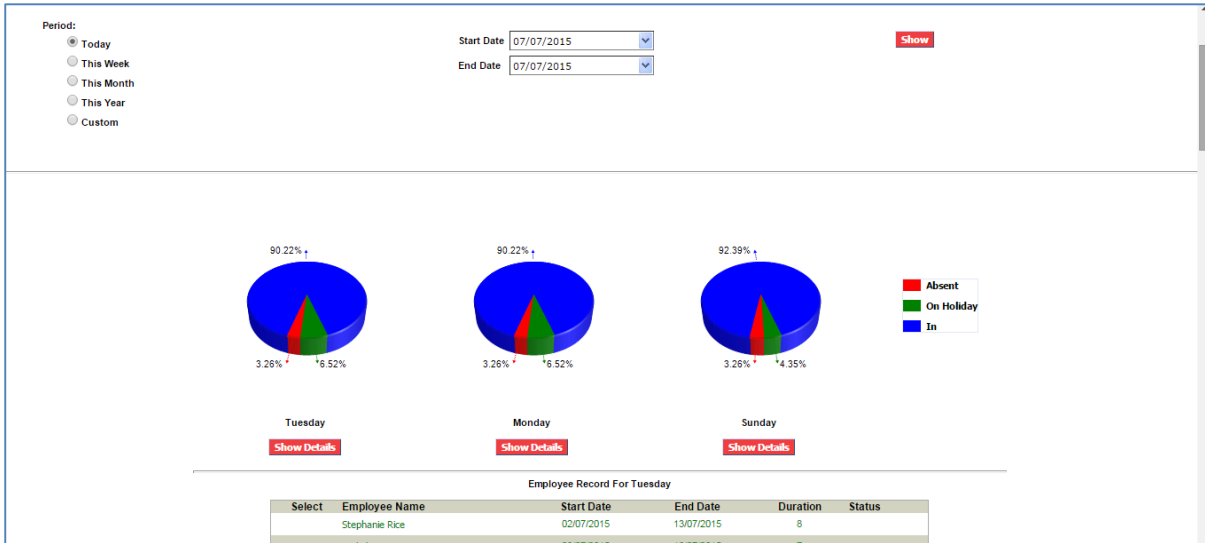
The screenshot shows a web interface with a navigation menu at the top. The menu includes: Home (red), Outstanding Requests (blue), Timesheets & Expenses (blue), Time & Attendance (blue), System Setup (blue), Reports (blue), and Appraisals (blue). Below this is a secondary menu with: Home Page (green), My Department (green), Phone List (green), Course Diary (green), Holiday Planner (green), and Policy Documents (white, highlighted). The main content area displays a green box with the text: **Employee Handbook**, Staff Handbook, and Staff Handbook.

Reports

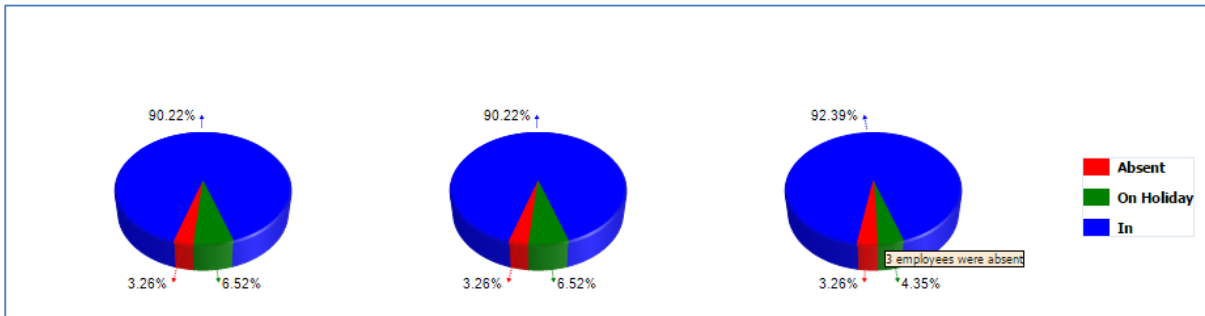
There is the ability to run absence and performance management reports from the Self Service system.

Absence Management



This report will detail employees working, on holiday or absent



Hovering over the different sections of the chart will detail how many employees were off.



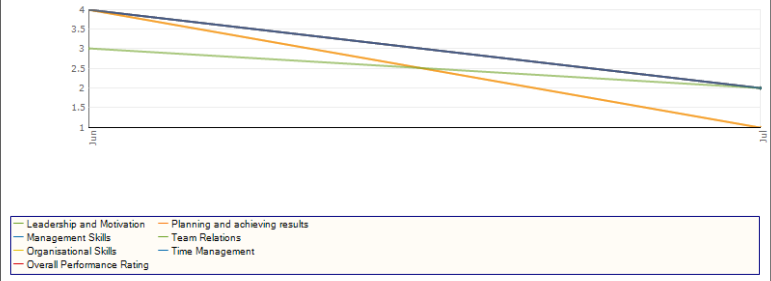
Performance Report

Start Date: End Date: Individual Company

[Get Report](#)

	January 2015	February 2015	March 2015	April 2015	May 2015	June 2015	July 2015	August 2015	September 2015	October 2015	November 2015	December 2015
Leadership and Motivation						4	2					
Management Skills						4	1					
Organisational Skills						4	2					
Overall Performance Rating						4	1					
Planning and achieving results						3	2					
Team Relations						4	2					
Time Management						4	2					



The chart displays performance scores for seven categories from June to July. The Y-axis ranges from 1 to 4. The X-axis shows 'Jun' and 'Jul'. The categories and their scores are:

Category	Jun	Jul
Leadership and Motivation	4	2
Management Skills	4	1
Organisational Skills	4	2
Overall Performance Rating	4	1
Planning and achieving results	3	2
Team Relations	4	2
Time Management	4	2