

# Manage Employees

## Practical Exercises

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# Manage Employees

## 1. Appoint a new employee

**WHY:** This section assists the administrator in adding an employee to Signify HR. Two methods are supported.

**WHERE:** From the system portal, click **Manage Employees** from the **Administration menu**. Or select **Modules | Manage Employees**.

1. Login to Signify HR and navigate to the **Manage Employees** menu by clicking Manage Employees from the Administration Menu or by clicking Modules | Manage Employees. The Employee List page will open.
2. Locate the SEARCH area on the page.
3. Use any of the search fields and search for the employee you'd like to appoint, making sure the employee does not already exist.

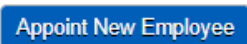

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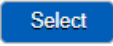
Each company is configured to make use of either the full appointment process (which relies on the existence of a position and an organisation structure) or the automated process (which seamlessly creates a position and links it to the org in one step for the user). The following section discusses the full process. Use whichever section is appropriate for the class.

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## 2. ...Via the Full Process

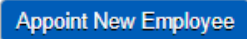

**WHY:** This section assumes you have used the Job Profiler module to create a job profile and a position and has then linked the position to a node in the organisation structure.

4. Click  to create a blank employee record.
5. Click  to open a list of positions that conforms to the following requirements:
6. The position must exist.

7. The position must be linked to a node in an organisation structure.
8. Only vacant positions can be selected although both vacant and occupied positions are shown.
9. Where a position has an incumbent his/her name is also shown.
10. The position's department/section is shown. Click the position's [\[More Info\]](#) link to display where the position is located in the organisation structure.
11. Select the appropriate position for the new employee by clicking on the record or by ticking its Select radio button and then click  .

### 3. ...or Via the Wizard Process

**WHY:** This section assumes you are not actively using the Job Profiler and Organisation Structure modules. When appointing a new employee, all processes in them are completed on your behalf.

12. Click  to create a blank employee record.
13. Click on the Position field's  icon to open the Position Wizard window. By default all vacant positions in the organisation will be displayed in the panel to the right.
14. On the left panel, select a specific node in the organisation structure, in order to display its vacant positions in the Right Panel.
15. Normally any of these positions can be selected to appoint the employee in. We, however, are going to focus on how the wizard creates a position if a suitable position does not exist.
16. If the required position is not available, select the node from the organisation structure in the left panel where the position is to be created.
17. The following link becomes available in the panel to the right:
18. [Click here to create a new Position in](#) ...(showing the name of the organisation node/level)
19. Click on the link in order to open the fields where a new position can be defined.
20. **SLOWLY** start typing the title of the new position e.g. Accountant.
21. As soon as you type a position title that already exists in the system, an automatic dropdown appears showing you all matching titles.
22. Either select one of the existing titles or complete the title of the new position.
23. If you select one of the available job titles, a new position will be added under the existing job profile. If you want to create a brand-new profile and position, click **Create as New Job Profile** to open the Create Job Profile window.

24. Complete the Job Profile details for the new position (if applicable).
25. Click Save to allow the system to automatically perform the following actions on your behalf:
  - Create the new profile and position in Job Profiler and,
  - link it to the selected organisation node in the organisation structure.
  - The page will close, return to the Appoint New Employee page and populate the position field with the newly created position.

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**In the preceding sections a position was either available for the new employee or one was created. The following sections explain how to complete the appointment process.**

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#### 4. Provide required personal and organisational information

***WHY:** A position was selected for the new employee but more information is required in order to link the employee to a leave group, to a line manager etc.*

26. Select an appropriate Appointment Type for the new employee.
27. Provide the date on which the employee will commence his duties – Appointed From.
28. If available, provide the employee’s proper employee number. In cases where the employee number is not yet available, use the employee’s National ID number until such time that an employee number becomes available.
  - The number provided here becomes the employee’s employee number as well as the employee’s PERMANENT username for logging into the system. The employee number can be changed once saved depending on the system configuration.
  - If the employee number is valid, the following message is displayed:

The Employee Number (6154635) is valid.

29. Enter any other available personal information.
30. In the Contact Detail group, provide appropriate contact details if available.
31. The Reporting Lines group is vitally important to all work flows between modules. Many modules and sections in Signify HR cannot be used unless appropriate reporting lines have been set up.

32. For the new employee, select at least a Line Manager by using the  icon.
- During and after the selection process the selected manager can be copied to any or all other reporting lines if needed.

## 5. Save the new employee record

33. Ensure that all items marked with an asterisk (\*) are completed. (Note that the Leave Detail and Remuneration Detail is not mandatory)
34. Click [Save and go to Employee Profile](#) to submit the record.
35. Immediately after saving, all other employee information sections for the new employee are made available on the menu to the left of the screen.

## 6. Create a user account for the employee

**WHY:** *Having a record in the system does not automatically allow an employee to login and use the system. A user account (with a username and password) must be created.*

**WHERE:** *From the main menu select **Modules | Manage Employees**. Search for and open the appropriate employee's record. Go to the Personal Information section.*

36. After saving the new employee record, a link is made available next to the employee number field with which to easily create a user account for the new employee. This account will enable the employee to log into Signify HR.
37. To create the user account, click [\[Create as System User\]](#).
38. Click OK to acknowledge that you want to create a user account for the employee.
39. A message is displayed, indicating the new username and password for the employee. The user thus created is assigned a standard set of user rights. Write down the login credentials in the space below.

User number	Write down the employee's user number
Password	Write down the employee's password

## 7. Test the new employee's user account

**WHY:** Just making sure that the employee will be able to log in with his new user account.

**WHERE:** From the main menu select **Modules | Manage Employees**. Search for and open the appropriate employee's record. Go to the Personal Information section.

40. After saving the new employee record and a user account was successfully created, the following will be displayed in the Additional Information section next to the to the employee number field. **Employee linked to system user** ...[showing the employee's user account]

## 8. Build up the employee's profile

**WHY:** An employee's personal and company information accumulates over time. Look into the following areas of information that could be used.

**WHERE:** From the main menu select **Modules | Manage Employees**. Search for and open the appropriate employee's record. Use the side-menu to identify the screens below.

41. From the side menu, select the following items and check their purpose. Try adding a record here and there.

- **Employee Profile – Additional Information:**

Additional Information is a section that enables you to add up to 21 customisable fields. These fields have a drop down list of values which can be configured and populated by a System Administrator.

- **Employee Profile – Custom Fields:**

Custom field is a section that enables you to add your own fields. Date, text and check box type of fields can be configured.

- **Employee Profile – Address:**

The address information is divided into 4 sections i.e Home Physical Address, Home Postal address, Business address and Location.

- **Employee Profile - Contact Detail:**

Lists of contact details with local examples provided. The following fields are available:

- Home Telephone Number
- Work Telephone Number
- Mobile Phone Number
- Email Address
- Fax Number
- Skype Name
- Some of this information can be updated by an employee from the Employee Self Service module

- **Employee Profile – Documents:**

Supporting documents can be attached such as an ID book, CV etc. Documents can be edited, deleted and downloaded.

- **Employee Profile – Medical History:**

A basic medical history summary giving information on an employee's overall occupational health in terms of systems (e.g. respiratory), existing conditions (e.g. IDDM), occupational diseases (e.g. occupational TB) and past referrals to other specialists or health care providers. The following sections are available:

- General physical: Blood Pressure, Pulse, Height, Weight, Certificate of fitness outcome.
- Systems: System Type e.g. Hearing, System Level, System Value and comments.
- Existing conditions: Condition e.g. Asthma, Last tested date, Next test date and comments.
- Occupational diseases: Disease e.g. Asbestosis and comments.
- Referrals: Type e.g. Dentist, Date, Action Taken and comments.
- Documents: Supporting documentation.

- **Employee Development – Notes:**

The notes made here do not have dates or responsible people linked to them. They are only representative of the thoughts of an employee's superiors regarding his personal development. The page can be used for capturing notes of any kind.



- **Employee Relations – Disciplinary (Standard):**

Allows a user to capture basic information regarding disciplinary actions taken against an employee.

- **Compliance – OHS Representation:**

OHS - Occupation Health and Safety provides Information on the company's elected Occupational Health and safety personnel e.g. Fire Fighter, First Aider etc.

- **Organisational Assignment – Appointment History:**

This section details the history of the employee's employment at this company. Here you also have various action items. You can Terminate, Transfer, Appoint the employee in another position, or simply make a correction. This section aims to keep history of all the appointments an employee held in different capacities at the current company.

An employee can be appointed in multiple positions whereby one of these positions will be defined as the primary position.

A Signify HR database can be shared amongst a number of different companies within the same group. Taking this into account, the following appointment dates are available:


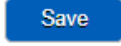
- **Start date in group:** The date the employee started working in the group.
- **Start date in company:** The date the employee started working in a particular company (also called a schema in the system).
- **Start date in position:** The date the employee was appointed in the position.

- **Organisational Assignment – Reporting Lines:**

The reporting lines section is an important part of many modules where workflows are expected to route requests for approvals and decisions to the correct people. In this section a number of module-specific next higher managers can be set up for an employee. E.g. if an employee requests to attend a training course, his request will be forwarded to the person who has been set up as his Training Manager. The Line Manager, usually an employee's direct manager, is the only mandatory field in the reporting line structure.

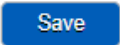
## 9. Capture Additional Information for an employee

**WHERE:** From the System Portal page, on the **Quick Start** menu, click **Manage Employees** and search for and open your employee's record.

42. Capture user-defined additional fields for an employee. This section has be pre-configured by a System Administrator.
43. From the **Quick Start** menu, click **Manage Employees**.
44. Search for and locate the employee for whom additional information has to be created.
45. Click to open the employee's record.
46. From the side menu, click to expand **Employee Profile** and then select **Additional Information**.
47. Complete the fields but note that you cannot type information in the fields you have to select an allowed value from a library. Use the  for this. Select a value and click .

## 10. Capture Custom Information for an employee

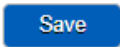
**WHERE:** From the System Portal page, on the **Quick Start** menu, click **Manage Employees** and search for and open your employee's record.

48. Capture user-defined custom fields for an employee. This section has be pre-configured by a System Administrator.
49. From the **Quick Start** menu, click **Manage Employees**.
50. Search for and locate the employee for whom custom information must be captured.
51. Click to open the employee's record.
52. From the side menu, click to expand **Employee Profile** and then select **Custom Field**.
53. Complete the fields and click .

## 11. Capture Contact Detail for an employee

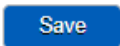
**WHERE:** From the System Portal page, on the **Quick Start** menu, click **Manage Employees** and search for and open your employee's record.

54. Capture contact detail for an employee.
55. From the **Quick Start** menu, click **Manage Employees**.

56. Search for and locate the employee for whom contact detail must be loaded.
57. Click to open the employee's record.
58. From the side menu, click to expand **Employee Profile** and then select **Contact Detail**.
59. Complete the fields and click  .

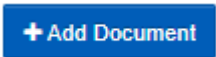
## 12. Capture Address Information for an employee

**WHERE:** From the System Portal page, on the **Quick Start** menu, click **Manage Employees** and search for and open your employee's record.

60. Capture contact detail for an employee.
61. From the **Quick Start** menu, click **Manage Employees**.
62. Search for and locate the employee for whom an address must be captured.
63. Click to open the employee's record.
64. From the side menu, click to expand **Employee Profile** and then select **Address**.
65. Complete the fields and click  .


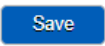
## 13. Load Documents for an employee

**WHERE:** From the System Portal page, on the **Quick Start** menu, click **Manage Employees** and search for and open your employee's record.

66. Capture contact detail for an employee.
67. From the **Quick Start** menu, click **Employees**.
68. Search for and locate the employee for whom documents must be loaded.
69. Click to open the employee's record.
70. From the side menu, click to expand **Employee Profile** and then select **Documents**.
71. Click  to open the File Uploader screen.
72. Enter a custom heading and click on "Drop file here" to select a document to upload.

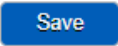
## 14. Load Medical Information for an employee

**WHERE:** From the System Portal page, on the **Quick Start** menu, click **Manage Employees** and search for and open your employee's record.

73. From the **Quick Start** menu, click **Employees**.
74. Search for and locate the employee for whom occupational medical information will be captured.
75. Click to open the employee's record.
76. From the side menu, click to expand **Employee Profile** and then select **Medical History**.
77. Go through the tabs as needed. Click  where needed to add records.
78. Complete the fields as required and click .

## 15. Load Notes for an employee

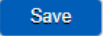
**WHERE:** From the System Portal page, on the **Quick Start** menu, click **Manage Employees** and search for and open your employee's record.

79. From the **Quick Start** menu, click **Employees**.
80. Search for and locate the employee for whom notes will be added.
81. Click to open the employee's record.
82. From the side menu, click to expand **Employee Development** and then select **Notes**.
83. Complete the field and click .

## 16. Load a Disciplinary Record for an employee

**WHERE:** From the System Portal page, on the **Quick Start** menu, click **Manage Employees** and search for and open your employee's record.

84. From the **Quick Start** menu, click **Employees**.
85. Search for and locate the employee for whom a disciplinary record will be added.
86. Click to open the employee's record.
87. From the side menu, click to expand **Employee Relations** and then select **Disciplinary (Standard)**.

88. Click  . Complete the fields and click  .

## 17. Loading learner records for employees is covered in the Learner Records manual

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**After appointing an employee, the three most important activities that could happen are a correction, a transfer and a termination.**

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## 18. Make a correction on the employee's appointment

**WHY:** Check out an employee's appointment history and make a simple correction on his current appointment.


**WHERE:** From the main menu select **Modules | Manage Employees**. Search for and open the appropriate employee's record.

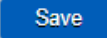
89. From the main menu select *Modules | Manage Employees*.

90. Locate any employee's record and open his/her record.

91. From the side menu, select *Organisational Assignment | Appointment History*. One or more appointment records will be present. We will suppose one needs a correction.

92. From the Action hyperlink of the appointment needing a correction, click **Make Correction** .

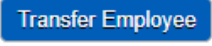

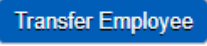
93. "Correct" any piece of information (e.g. the appointment date, select another available position by using  . Note that only vacant positions linked to the organisation structure are shown in this list)

94. Fix whatever else needs to be fixed and click  to submit the record.

## 19. Transfer an employee to another position (in the same company)

**WHY:** *Employees are moved around, either due to restructuring, promotions or any other reason. Here is how to do it.*

**WHERE:** *From the main menu select **Modules | Manage Employees**. Search for and open the appropriate employee's record.*

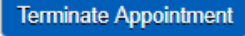
95. From the main menu select *Modules | Manage Employees*.
96. Locate any employee's record and open his/her record.
97. From the side menu, select *Organisational Assignment | Appointment History*.
98. On the screen locate and click the button .
99. Select the Reason for Transfer from the drop down list.
100. From the top section, select the radio button which reads "New Employee will stay within Your Company"
101. Use  to select an appropriate position to transfer the employee to and complete the other relevant details.
102. Click  to finalise the transfer.
103. The employee will now have TWO appointment records:
  - ONE of which has a date in the **TO** field as well as a reason why the appointment was ended.
  - ONE new appointment, reflecting the position to which the employee was just transferred.

## 20. Terminate an employee

**WHY:** *Learn how to terminate an employee's employment.*

**WHERE:** *From the main menu select **Modules | Manage Employees**.*

104. On the screen *Manage Employees | Employee List*, locate any employee whose employment is to be terminated.
105. Click the **Action** hyperlink in the employee's record to view the available options.
106. Select **Terminate Appointment**.

107. All the positions that will be ended because of the employment termination are listed at the top of the screen.
108. Complete the required fields and click  to complete the transaction.
109. Note that ALL the employee's current appointments are terminated by this action.

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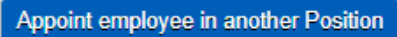

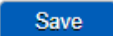
**The following activities are limited to companies maintaining multiple schemas/companies in one database or companies where an employee can be appointed in more than one position at the same time. Some of these actions, requiring a multi-schema database will therefore not be possible in a single-schema database.**

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## 21. Optional: Appoint the employee in an additional position

**WHY:** Occasionally an employee can be appointed in more than one position simultaneously. Here are the steps.

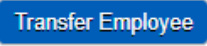
**WHERE:** From the main menu select **Modules | Manage Employees**. Search for and open the appropriate employee's record.

110. From the main menu select Modules | Manage Employees.
111. Locate any employee's record and open his/her record.
112. From the side menu, select Organisational Assignment | Appointment History.
113. Click .
114. Select the appropriate position by using . (Note that only vacant positions linked to the organisation structure are shown in this list)
115. Complete the required fields and click  to submit the record.
116. A second appointment is added to the employee's appointments portfolio.
117. Note that both appointments' **TO** dates say **PRESENT**.

## 22. Optional: One of the employee's appointments is transferred

**WHY:** *An employee has been appointed in more than one position. Here are the steps to transfer only one of these appointments.*


**WHERE:** *From the main menu select **Modules | Manage Employees**. Search for and open the appropriate employee's record.*

118. From the main menu select **Modules | Manage Employees**.
119. Locate the employee (from the previous section) who is appointed in more than one position and open his/her record.
120. From the side menu, select **Organisational Assignment | Appointment History**.
121. On the **Appointment History** page locate the applicable appointment and click on the appointment's **Action** hyperlink to see the available options.
122. Click **Transfer to Another Position**.
123. Complete the relevant details and click  to finalise the transfer.
124. The employee will now have THREE appointment records – one of which has a date in the **TO** field as well as a reason why the appointment was ended.

## 23. Optional: One of the employee's appointments is terminated

**WHY:** *An employee has been appointed in more than one position. Here are the steps to terminate one of these appointments.*

**WHERE:** *From the main menu select **Modules | Manage Employees**. Search for and open the appropriate employee's record.*

125. Locate any appropriate employee on the screen **Manage Employees | Employee List**.
126. On the screen **Manage Employees | Organisational Assignment | Appointment History**, locate the appointment record that is to be terminated or ended.
127. Click the **Action** hyperlink next to the appropriate position/appointment that is to be terminated and select **Terminate Appointment**.
128. The position that will be ended is shown at the top of the page.
129. Provide the required details and click  .
130. Note that **ONLY** the selected appointment is terminated by this action.



## 24. Review the employee reports

**WHY:** *An employee needs to be explicitly linked to these reports in order to see them but do review them if they are available.*

131. On the main menu, click **Reporting – Reports** and navigate to the **Employee Profile Reports** section.
132. Open and review the available reports.

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### Discuss subgroups as a group

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## 25. Subgroups

**WHY:** *Certain types of employees can be grouped e.g. employees reporting to a certain manager, employees on a certain job level etc. Users can be granted specific access rights on these groups.*

**WHERE:** *From the main screen/portal, click My Employees.*

133. On the main landing or portal page, locate and click My Employees from the Quick Start menu.
134. Locate the Subgroup dropdown.

## 26. Using SmartNav

**WHY:** *The Smart Navigation tool is the recommended way for quick navigation between employee records – provided you know the employee's employee number or a part of their name or surname.*

**WHERE:** *From the main menu select **Modules | Manage Employees**. Search for and open the appropriate employee's record.*

135. From the main menu select Modules | Manage Employees.
136. Locate and open any employee's record.

137. Open any detail page from the side menu e.g. Personal Information
138. When on the **page**, locate the **SmartNav** field at the top of the page.
139. Type an employee number, part of a name or surname into the **SmartNav** field and click **Submit**.
140. If the employee, matching the criteria that you have typed is found, the system jumps to and immediately opens the employee's records. If more than one possible match is found, a popup screen lists all possible matches, allowing you to select the appropriate employee. If no possible match is found, the screen stays on your current employee.