



Signify
SOFTWARE

Signify HR

Human Resource Management

Manage Employee and User Practical Guide

2016-06-27

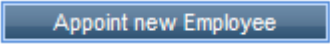


Final

MANAGE EMPLOYEES

1. APPOINT A NEW EMPLOYEE

WHY: This section assists the administrator in adding an employee to Signify HR.

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.
4. Click  to create a blank employee record.
5. 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.
6. On the left panel, select a specific node in the organisation structure, in order to display its vacant positions in the right panel.
 - a. Please note that any current vacancies (available in the selected node) are visible on the right hand side and could be used to appoint a new employee.
7. The following link will become available in the right panel:
8. [Click here to create a new Position in](#)...(showing the name of the organisation node/level)
9. Click on the link in order to open the fields where a new position can be defined.
10. **SLOWLY** start typing the title of the new position e.g. Back Griller.
11. As soon as you type a position title that already exists in the system, an automatic dropdown appears showing you all matching titles.
12. Preferably, select one of the existing titles or complete the title of the new position.
13. If you select one of the available titles, a new position will be created for you. If you want to create a brand new position (not already existing), click  to open the Create Job Profile window. Complete the Job Profile details for the new position.

14. Click Save to create the new profile and position in Job Profiler and link it to the relevant 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.

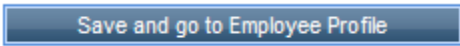
2. PROVIDE MORE INFORMATION ON THE EMPLOYEE

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.

15. Select an appropriate Appointment Type for the new employee.
16. Provide the date on which the employee will commence his duties – Appointed From.
17. 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 cannot be changed once saved.
 - If the employee number is valid, the following message is displayed:

The Employee Number (6154635) is valid.
18. Enter any other available personal information.
19. In the Contact Detail group, provide appropriate contact details if available.
20. 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.
21. 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.

3. SAVE THE NEW EMPLOYEE’S RECORD

22. Ensure that all items marked with an asterisk (*) are completed.
23. Click  to submit the record.
24. Immediately after saving, all other employee information sections for the new employee are made available on the menu to the left of the screen.

4. 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. This is usually done automatically after hours but it is possible to create a user account directly after the creation of an employee record.

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

25. 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.
26. To create the user account, click [\[Create as System User\]](#) .
27. Click OK to acknowledge that you want to create a user account for the employee.
28. A message is displayed, indicating the new username and password for the employee. This could be communicated to the user if needed. The user thus created is assigned a standard set of user rights. Write down the login credentials in the space below.

5. 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.

29. 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.

6. BUILD UP THE EMPLOYEE'S PERSONAL INFORMATION

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.

30. From the side menu, select the following items and check their purpose. Try adding a record here and there.
- Employee Profile - Address
 - Employee Profile - Contact Detail
 - Employee Profile - Documents
 - Employee Profile - Next of Kin
 - Organisational Assignment – Previous Employment
 - Organisational Assignment – Reporting Lines
 - Employee Development – Learner Records (Also see further on)

7. 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.

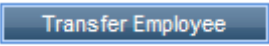

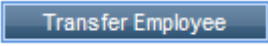
31. From the main menu select *Modules | Manage Employees*.
32. Locate the employee's record and open his/her record.
33. From the side menu, select *Organisational Assignment | Appointment History*. One or more appointment records will be present. Choose the one needing a correction.
34. From the Action hyperlink of the appointment needing a correction, click **Make Correction** .
35. 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)
36. Fix whatever else needs to be fixed and click  to submit the record.

8. TRANSFER AN EMPLOYEE TO ANOTHER POSITION

WHY: Employees are moved around, either due to restructuring, promotions or any other reason. Here is how to do it but note that only users having this particular right will be able to do the transfer.

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


37. From the main menu select *Modules | Manage Employees*.
38. Locate any employee's record and open his/her record.

39. From the side menu, select *Organisational Assignment | Appointment History*.
40. On the screen locate and click the button .
41. From the top section, select the radio button which reads “New Employee will stay within Your Company”
42. Use  to select an appropriate position to transfer the employee to and complete the other relevant details.
43. Click  to finalise the transfer.
44. 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.

9. TERMINATE AN EMPLOYEE

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


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

45. On the screen *Manage Employees | Employee List*, locate any employee whose employment is to be terminated.
46. Click the **Action** hyperlink in the employee’s record to view the available options.
47. Select **Terminate Employee**.
48. All the positions that will be ended because of the employment termination are listed at the top of the screen.
49. Complete the required fields and click  to complete the transaction.
50. Note that ALL the employee’s current appointments are terminated by this action.

10. LOAD A LEARNER RECORD FOR AN EMPLOYEE

WHY: *Let’s check where an employee’s learner records are stored.*

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

51. An employee has attended an external training course and you have to manually capture the learner record for the attendee.
52. From the **Quick Start** menu, click **Manage Employees**.
53. Search for and locate the employee for whom a learner record has to be created.
54. Click to open the employee's record.
55. From the side menu, click to expand **Employee Development** and then select **Learner Records**.
56. Click ADD.
57. Ensure TRAINING is selected at the top of the screen.
58. Complete the other fields but note that for some fields you cannot type information, you have to select an allowed value from a library. Use the  for this. Search thoroughly! If you can't find a suitable item, contact your L&D Practitioner for assistance.
59. Save the record.
60. After saving it (and going back to the Learner records List page, you can click Action | Copy to other employees if the record applies to more than one employee.

11. REVIEW 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.*

61. On the Quick Start menu, click Reports and navigate to any of the following report groups.

Employee Profile Reports	List of Employees
Training Reports	Training History Training Summary Did my Employees Complete an Assessment

62. Provide search criteria if present to limit the volume of data returned by the report.
63. Open and review the available reports.

12. 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.*

64. On the main landing or portal page, locate and click My Employees from the Quick Start menu.
65. Locate the Subgroup dropdown at the top of the page.
66. Select the appropriate subgroup from the list, or click **More** for a comprehensive list.
67. Search for and select the appropriate subgroup.
68. After the subgroup search screen closed, click **Activate** to activate the subgroup.
69. From now, all screens and reports will be filtered to show only employees allowed by the subgroup.

13. 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.*

70. From the main menu select *Modules | Manage Employees*.
71. Locate and open any employee's record.
72. Open any detail page from the side menu e.g. Personal Information
73. When on the **page**, locate the **SmartNav** field at the top of the page.
74. Type an employee number, part of a name or surname into the **SmartNav** field and click **Submit**.
75. 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.

14. CHECK YOUR EMPLOYEES

WHY: *Managers need to know who their employees are and occasionally have to check their details.*



WHERE: *From the main screen/portal, click My Employees from the Quick Start Menu.*

76. On the main landing or portal page, locate and click  from the Quick Start menu.
74. A number of important features are contained on this page.
75. The dropdown **Current Subgroup** contains a list of all subgroups a manager/employee is allowed to view or work on. Click to expand the dropdown to see what you have access to.
76. When any of these subgroups is selected and activated, the following happens:
- Only the employees included under the subgroup's criteria are visible on employee-related screens.
 - Only the employees included under the subgroup's criteria are visible on employee-related reports.
77. The number of employee visible in the current subgroup is shown just below the SEARCH area.
- Number of Employees in All Employees: 6227**
78. A list of all employees covered by the activated subgroup is shown. For each employee:
- Basic information is shown
 - A photo can be loaded
 - An **Employee Profile Report** can be viewed, showing a summary of the employee's essential information e.g. leave, next of kin etc.

15. OTHER FUNCTIONALITIES AVAILABLE TO EMPLOYEES / USERS

WHY: *Some other functions can be made available to employees but this depends on a company's preferences. Below are a few examples.*

WHERE: *From the main screen/portal, click the Quick Start Menu's heading.*

79. Expand the Quick Start menu by clicking its heading.
80. Click to open a number of the other topics available from the Quick Start menu.
-  – Showing all your learner records in the database. This includes courses attended, qualifications etc.
 -  – A menu of training pathways available to employees.
 - Training Courses – A menu of training courses available to employees.
 - Reports – Access to reports that were specifically issued to an employee.
 - Show More Topics (if applicable) – Turn the page to see other Quick Start menu topics.

16. REPORTS

WHY: A few standard employee-related reports are loaded with implementation. These can be expanded or added to depending on a client's requirements.

WHERE: From the main screen/portal, click the Quick Start Menu's heading.

81. On the Quick Start menu, click **Reports** to view the page where all reports that a person has access to, are displayed.

82. Note the following:

- Most reports but especially the employee-related reports are subgroup dependent. Only the people included in a subgroup could be visible on a report.
- Use report criteria wisely to minimize the number of records returned.
- Reports can be exported or directly copied to Excel.

COURSE MANAGEMENT

17. HOW A MANAGER WOULD BOOK HIS EMPLOYEES ON A COURSE

WHY: In some instances employees cannot book themselves on courses, their managers are expected to book them. This section shows how it is done.

WHERE: From the system portal, click **Book a Course**.

84. On the **Advertised Events** page, find an event under its unique reference number and click to open its booking form.

85. At the top of the page, locate the tab .

86. Use the button  to select people from your list of employees (if any is linked).

87. Since it is the manager nominating his employees, they are automatically approved in the loading process and just await booking by the course coordinator.