

Job Profiler

Practical Exercise

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Job Profiler Module

Before Starting this section (Can be deleted before printing)

For the Facilitator

Ensure that the following sections/master data contain some information:

- Module Configuration
 - Compiler Administration
 - Status Administration
 - Configuration Settings (especially inheritance, preferably set to standard inheritance)
 - Report Settings
 - Company Values List
 - Company Logos
 - NB: Assign Job Profiler Administrator rights to all users

- Master Data:
 - Occupational Domain
 - Occupational Level
 - OFO Codes (if applicable, especially for ARM)
 - Business Process
 - Patterson - Company Individual
 - Qualification library (relevant to industry)
 - Licence Library (relevant to industry)
 - Programme Library (relevant to industry)
 - Standards Library (relevant to industry)

Also prepare some samples in terms of the following which are typical to the industry for the customer:

- Positions typical to the industry, and for each:
 - Key Performance Outputs / KPAs
 - Relevant experience
 - Relevant skills
 - Relevant Competencies
 - Relevant training interventions

- A sample document relevant to that position

- Ensure that the trainees have been setup as Job Profile Administrators
- Print the login/URL slips.

The Job Profiler Module allows a user to define and create a Profile or job description for every job in the organisation.

During this training session we will do the following:

- Create a new job (Quick Add using the wizard)
- Explore/EDIT a job and its positions using an existing job
- Create a new Job Profile (Long Route)
- Create a new job by copying an existing job
- Position Versioning
- Explain the difference between Locked and not locked Positions

Job Profiler Module

1. Setting the Scene

- Introduction to jobs, positions, employees and inheritance:
 - Job Profiles – Basic description for tasks and responsibilities (later referred to as jobs)
 - Positions – Specific position for job in which someone is to be appointed (can have multiple positions per job).
 - Employees – Physical person employed within a specific position.
 - Inheritance – Positions inheriting from Job, Employees from Positions.
 - Pure
 - Inherit and add
 - Completely different
- Job Profiler shares information with and creates a base structure used by other Signify HR modules. Find below a diagram indicating some of these relationships.

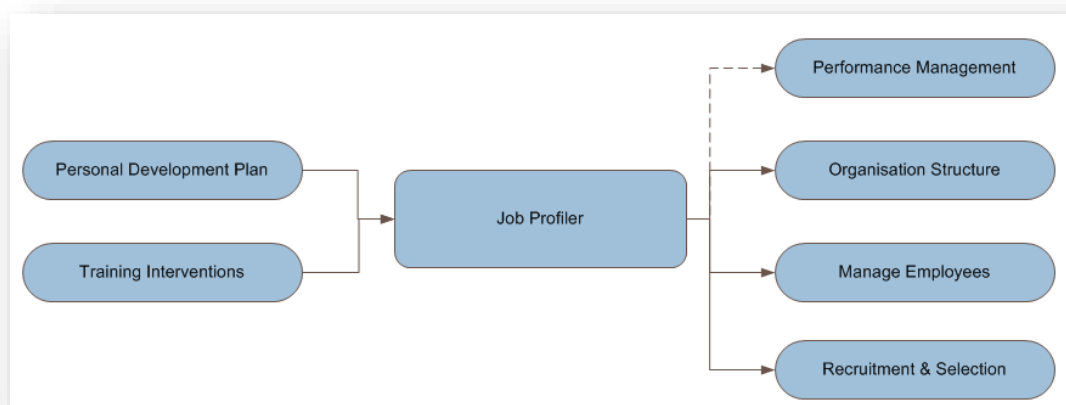


Figure 1: Relationship diagram

- Note the following that will impact job advertisements built for a profile’s position:
 - Documents loaded on the Job or Position could be visible in the advertisement
 - People applying for vacancies will be expected to rate themselves against sections populated for a profile/position e.g. Qualifications, Skills and Competencies

2. Discuss the Following Key Concepts

1. Understand the difference between a job and a position.
2. Understand inheritance.
3. Understand record locking.
4. Understand that a position has to be located/linked to the org structure.

3. Create a new Job (Quick Add using the Wizard)

5. Navigate to: System Administration | Modules | Job Management | Job Profiler
6. Ensure the job does not exist yet by searching on job title and/or job code.
7. To create a new job by using the wizard, click [Add new Profile \(Quick Add\)](#). We will be following each step (below) from 1 to 9, completing all relevant details for the job.


4. Step 1 – Job Information

8. Ensure all of the basic details for the job is completed – the following example information could be used:

FIELD	CONTENT (Sample)
Job Title	Division Manager
Job Code	<Provide your own code>
Occupational domain	Senior Management
N/A	N/A (Default)
Signify Grading System	A / JE Manager
Patterson	X1

9. Click [Save](#) and [Proceed to Step 2](#).


5. Step 2 – Career Path

10. Edit the career path (possible future growth progression) by clicking the edit button ().
11. Change the values as follows:

FIELD	CONTENT (Sample)
Future Position 1	National Manager
Future Position 2	Director
Future Position 3	Managing Director

12. Click  and proceed to step 3.

6. Step 3 – Job Description

13. Four tabs are available for which details could be entered. By default, the **“Purpose”** tab is selected. Enter a description of the purpose of the position then click  .
14. Switch to the **“Key Interaction”** tab. This is used to identify day-to-day interactions that the job could imply. To add an interaction, select **“Add a new Key Interaction”** and populate fields as follows:

FIELD	CONTENT (Sample)
Contact	National Manager
Purpose	Primary reporting to direct manager

15. For each interaction required, enter the values and click **“Save Add New”** to save the current record and create a new blank record for your next value; after adding the final record, click **“Save”**.
 - Keep in mind that the interactions added can be re-used; try and make them as generic as possible.

16. Click **“Select from existing Key Interactions”** – in the page that opens, select at least one existing interaction by ticking the “Select” tick box on the left and click **“Save Selected”** to add it to the list. This list is generated by previously added interactions.
17. Switch to the **“Responsibilities”** tab. Click **“Add a new Responsibility”** and populate fields as follows:

FIELD	CONTENT (Sample)
Perspective	Manage daily divisional operations
Description	Ensure efficient daily operations of a specific division

- For each responsibility, enter the values and click **“Save Add New”**; for the final responsibility, click **“Save”**.
- Note that you can **“Select from existing Responsibilities”**

18. Switch to the **“Outputs”** tab. Click **“Add a new Output”** to add an output – populate fields as follows:

FIELD	CONTENT (Sample)
Output Title	Deliver Weekly Operations Report
Description	Compile a weekly report on the daily operations within the organisation.

- Note that you can **“Select from existing Outputs”**

19. Click **“Proceed to Step 4”**.

7. Step 4 – Key Performance Outputs

20. In this step a list of all Key Performance Areas (KPA) are defined against which the position could be measured during Performance Management. Click **“Add New Key Performance Areas”** to

add new KPAs – populate fields as follows:

FIELD	CONTENT (Sample)
KPA	Minimal downtime for division
Outputs	Divisional downtime
Descriptor	Downtime for division as percentage of total yearly hours
Measures	<p>< 1% = 100%</p> <p>1% < 2% = 90%</p> <p>2% < 5% = 50%</p> <p>> 5% = 0%</p>

21. Click **“Proceed to Step 5”**.

8. Step 5 – Job Requirements (Education/Qualifications)

22. In this step a list of all Educational Qualifications relevant to and required for the job is compiled.

23. Click **“Add a new Qualification”** to add 2 qualifications – populate fields as follows:

FIELD	CONTENT (Sample)
Qualification	1-2 Year Certificate in Procurement or Purchasing management
Area	
Importance	Essential / Minimum

24. Click **“Proceed to Step 6”**.

9. Step 6 – Job Requirements (Experience)

25. In this step a list of all past experience relevant to and required for the job is compiled. Click **“Add a new Experience”** to add an experience aspect – populate fields as follows:

FIELD	CONTENT (Sample)
Process/Place/Area	Mining Operations
Involvement	Operational
Period(Years)	10
Importance	Essential / Minimum
Activities Involved	Handling daily problems experienced in mining operations

26. Make sure you experiment with add, edit and delete on this step.

27. Click **“Proceed to Step 7”**.

10. Step 7 – Job Requirements (Technical Skill Set)

28. In this step a list of all technical skills a person in this job is expected to have. Click **“Add a new Skill”** to add a skill – populate fields as follows:

FIELD	CONTENT (Sample)
Title	People Soft Skills
Description	Being able to work with people, motivating them to perform in a certain way
Importance	Recommended / Desirable

29. Make sure you experiment with add, edit and delete on this step.

30. Click **“Proceed to Step 8”**.

11. Step 8 – Key Competencies

31. In this step a list of all key competencies a person in this job is expected to possess. Click **“Add new Competencies”** to add a competency – populate fields as follows:

FIELD	CONTENT (Sample)
Title	Operational Management
Description	Ability to manage all aspects of mining operations on a day-to-day basis.
Importance	Recommended / Desirable
Competencies Group	Technical Competencies
Competencies Category	Category 1
Proficiency Level	Competency Level 2
NQF Level	NQF Level 3
Content	
Criteria	
Context	Mining Operations

32. Make sure you experiment with add, edit and delete on this step.

33. Click **“Proceed to Step 9”**.

12. Step 9 – Job Fit Attributes

34. In this step a list of recommended personal attributes/characteristics are listed. Click **“Add new Personal Attributes”** to add a characteristic – populate fields as follows:

FIELD	CONTENT (Sample)
Title	Motivator

FIELD	CONTENT (Sample)
Description	Must be able to effectively motivate employees of the mine to give their best.
Category	
Personal characteristics	Good speaker Ability to quickly asses the character of a person and determine what will motivate them
Personal career interests	
Organisational culture / values	Excellence
Work environment physical demands	
Work environment emotional demands	Employees becoming negative

35. Make sure you experiment with add, edit and delete on this step.

36. Now click  (Only available on LIVE systems if enabled)

- A page opens which shows the basic details of the newly created job, including the job code, title and purpose.
- To save the Job Profile Report (containing the details of the job just created) as an MS Word document, click the link for **“Job Report”**

13. Unlocking a Locked Job

37. Navigate to System Administration | Modules | Job Management | Job Profiler.

38. Search for the job “Division Manager”, filtering according to the title.

39. Locate the **Locked By** field in the record grid. You should be the person currently locking the record. This means only you would be able to do updates on the record until you explicitly unlock the record for editing by other users.

14. Explore/EDIT a job and its positions using an Existing job

40. Navigate to System Administration | Modules | Job Management | Job Profiler
41. Search for the job “Division Manager”, filtering according to the title.
42. Click on **Action | Edit** of the relevant job to display the **Organisation and Compensation Profile** detail page which can be edited/updated.
43. Check that the some of the information submitted via the Quick Add process is present on the page.
44. The tree view menu on the left allows the editing of all relevant aspects for the profile.

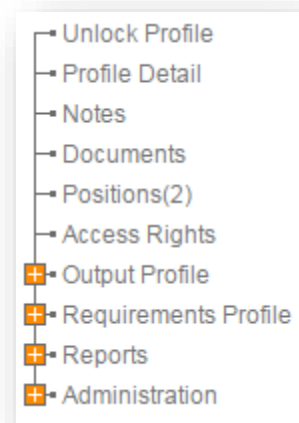



Figure 2: Edit a job

15. Add Documents to a Job Profile

45. Click on the **Documents** menu item on the left to display a list of documents relevant to the job.
46. Add documents by clicking “**Add**” and then clicking “**Choose File**” and browsing to the document on your PC, selecting it and clicking on “**Save**”.

16. Look for the Other Information Submitted via the Job Quick Add

47. Click  next to **Output Profile** to expand the tree.
48. Open a few of the submenus and locate some of the information previously submitted via the Quick Add process.
49. Repeat for **Requirements Profile**.

17. One Job Could Have More Than One Position

If more than one employee will be performing the same functions relating to a specific job,

- Multiple positions could be created, one for each employee.
- The positions could be in different divisions within the organisation structure as a job is org independent.

- All positions have to be linked to the physical organisation structure in order to ensure the position can be advertised, properly administrated and an employee appointed in the position.

18. Explore the Position Menu Structure Under its Parent Job

50. Navigate to System Administration | Modules | Job Management | Job Profiler.
51. Search for the job “Division Manager”, filtering according to the title, and edit the position.
52. Review the items on the menu to the left of the screen.
53. Locate and click **Positions(#)** on the menu item. All positions for the job are listed on the right.
54. Click to open one of the position records.
55. Review the items on the menu to the left of the screen. They are a copy of the menu items available to the parent job i.e. the attributes of the job are all available to the position(s).
56. Quickly navigate through the screens and confirm that all the parent job’s attributes have been inherited to the child position.

19. Add a New Position to the Job and Link it to the Active Organisation Structure (The Long Way)

57. Navigate to System Administration | Modules | Job Management | Job Profiler
58. Search for the job “Division Manager”, filtering according to the title and edit the position.
59. Click on the menu item on the left **Positions(#)** (# = the number of positions currently linked to the job). All positions for the job are listed on the right.
60. Click **Add a new Position** and complete details for the position.
 - Position details can be inherited from its parent job – tick the option “Inherit this section from Profile” (default)
 - For each child position of a parent job, make use of the **Status** field to indicate activity on the position’s information.
 - Click SAVE when done to return to the list of positions for a job.
61. All positions which have not yet been linked to the organisation structure will have a link in the column “Where is this Position?”: **Link Position To Org** – locate one such position.
 - Click this link – the basic company structure now shows in the window that opens.

- Navigate to the division within which the position will be made available and click on the division to select it. (You can click on the “+” next to any division to expand to its sub-divisions)
- Now ensure that all positions for the job have been linked to the organisation structure.


20. Add a Position to the Job by Copying an Existing Position (Short Cut)

An existing position can be used as template for more positions to be added to the job (e.g. if there are 10 positions for the job which all have the same basic details).

62. Navigate to System Administration | Modules | Job Management | Job Profiler
63. Search for the job “Division Manager”, filtering according to the title, and open the job.
64. Click on the menu item on the left **Positions(#)** (# = the number of positions currently linked to the Job) – now all positions for the job are listed on the right.
65. Choose the position to be used as template:
 - In the position’s **Action** field, select **Click Here To | Copy**.
 - Ensure the position code and title for the new position to be created is specified correctly.
 - If the same position is to be copied multiple times, click **Copy Position Again** for each.
 - For the last position to be copied, click **Copy Position**.
 - The Organisation Structure link is NOT duplicated – this has to be done separately for each new position copied.

21. Output Profile

*The **Output Profile** for a job contains the expected outputs in certain areas for any employee appointed in such a position.*

66. Navigate to: System Administration | Modules | Job Management | Job Profiler
67. Search for the job “Division Manager”, filtering according to the title.
68. Now select on the left of the job **Click here to... | Edit** option.
69. Expand the **Output Profile** menu item on the left by clicking the  next to it.


22. Requirements Profile

Certain details which you saved earlier by using the wizard, will be visible in the requirements profile and can be updated here.

70. Navigate to: System Administration | Modules | Job Management | Job Profiler

71. Search for the job “Division Manager”, filtering according to the title.

72. Now select on the left of the job **Click here to...** | **Edit**.

73. Expand the **Requirements Profile** menu item on the left by clicking the  next to it.

23. Requirements Profile - Qualifications

74. Click on “**Qualifications**” on the left and check if your loaded qualifications are visible.

75. Check out the other menu items.

- Experience
- Skills
- Competencies
- Personal Attributes

76. Take note that some requirements profile areas are not covered by the quick add wizard (and can be updated on the job) – these areas include the following:

- Training Interventions
- Programmes
- Licences
- Standards
- Driving Licence
- Professional Status (Accreditation and Registration, Memberships, etc.)

24. Requirements Profile - Training Interventions

Details of all training relevant to the job and which the employee is expected to attend can be specified (whether compulsory for the job or not).

77. Expand the **“Requirements Profile”** menu item on the left and click **“Training Interventions”**.
78. Click **“Add”** to add a new training intervention for the job. Capture details for the training as per the table below:

FIELD	CONTENT (Sample)
Training Intervention	e.g. Customer Handling Skills <i>(select whatever is available)</i>
PDP Period	2015-2017
PDP Category	Compulsory Training
Add and approve the course for all employees in this position	Yes

- For each training intervention, enter the values and click **“Save Add New”**; for the final training intervention, click **“Save”**.
- Once all interventions are added, click **“Close”** to return to the list.

25. Requirements Profile - Programmes

- Details of all programmes forming part of a job’s training requirements can be captured.
- The programmes listed will reflect on an employee’s PDP/IDP.

79. Expand the **“Requirements Profile”** menu item on the left and click **“Programmes”**.

- All programmes forming part of the job’s training requirements are listed here and can be added from the programmes library, in the same way a licence is added.

26. Requirements Profile - Unit Standards

- Details of all unit standards forming part of a job’s training requirements can be captured.

- The unit standards listed will reflect on an employee's PDP/IDP.

80. Expand the **Requirements Profile** menu item on the left and click **Unit Standards**.

- All unit standards forming part of the job's training requirements are listed here and can be added from the standards library, in the same way a licence is added.

27. Create a new Job Profile (Not the quickest way)

This method is illustrated for completeness' sake. The Quick Add wizard combines the most important bits of job profile information into 9 steps whereas this method allows a user to traverse through the detail screen by screen.

81. Navigate to: System Administration | Modules | Job Management | Job Profiler.

82. To create a new job, click .

83. Provide the information as needed and click SAVE. The job is saved and its first position is added.

84. Once created, further details relevant to the profile must be added section by section using the menu options as discussed earlier.

28. Create a new Job by Copying an Existing Job

An existing job can be copied to a new job (forming the starting point) and then updated to make distinguishing changes.

85. Navigate to: System Administration | Modules | Job Management | Job Profiler.

86. Now search for job title "Divisional Manager" (the existing job which contains the structure and details to be copied to a new job).

87. On the left of the relevant job, click on **Click here to...** | **Copy** and then enter the values for the new job as per the table below and click **Copy Job Profile and Positions**.

FIELD	CONTENT (Sample)
New Job Profile Code	<Provide your own code>
New Job Profile Title	Sectional Manager

88. A list of all positions under the existing job is listed, each with its position code and position title.

- To apply the new job code to all position codes, click “Apply to all Position Codes” to the right of the New Job Profile Code (“.01”, “.02”, “.03” etc. gets appended to the position code to make each position code unique).
- To apply the new job title to all position codes, click “Apply to all Position Titles” to the right of the New Job Profile Title.
- Alternatively edit each position code and title individually.
- Click **Continue**.

89. Return to the Profile Search screen and search for the job title “Sectional Manager” in the Job Profile List.

- On the left of the job select **Click here to... | Edit**.
- Review the profile detail and ensure it is correct.
- Click “Documents” on the left in the tree structure – note the documents have been copied to the new profile.
- Click “Positions” on the left in the tree structure – note all positions have been duplicated from the existing profile with all details.
- Note the positions have not been linked to the organisation structure. Link them if required.
- Additionally, review the “Output Profile” and “Requirements Profile” confirming this has been duplicated as well.

If You Have Time Left

29. Versioning

Briefly discuss the need for versioning, using a practical example:

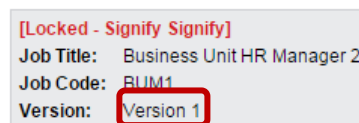
- a job which is created with positions with people employed in these positions; contracts signed.
- the job profile/description changing (additional responsibilities, changed requirements);
- new positions created for the changed profile, but the existing positions cannot change in their composition.

90. Navigate to: System Administration | Modules | Job Management | Job Profiler.

91. Now search for job title “Divisional Manager” (the existing job which contains the structure and details to be copied to a new job).

92. On the left of the relevant job, click on **Click here to... | Edit**

93. In the profile detail, note the versioning details for the job at the top of the screen, similar to the screen shot.



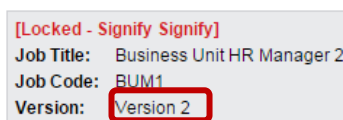
94. Select **Positions** in the tree structure on the left, then for any of the positions listed on the right, select **Click here to... | Edit**.

- Note the versioning details for the position, similar to the screen shot below.
- Verify the tick box for “Inherit this section from Profile” is currently ticked (as below)



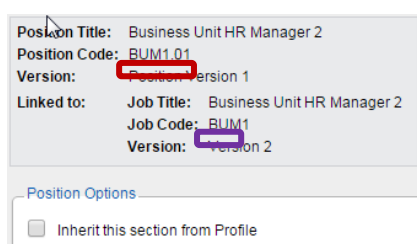
95. Go back to the job profile by clicking  and then **Profile Detail**.

96. Scroll to the bottom and click **Create Version 2** – Carefully review the warning message that comes up and click **OK** to confirm the creation of the new version for the job profile. Note the new version number.



97. Go to the position previously viewed under **Positions** and Edit a position. Note the following:

- The difference in version numbers for the position and the profile.
- The option for **Inherit this section from Profile** is no longer ticked.



- Also select some other areas within the position profile in the tree structure on the left (e.g. Documents, Job Intent, Qualifications) and verify the option for **Inherit this section from Profile** is not ticked.

98. Create a new position under the profile and verify its version number now to be the same as the job profile version number.

30. Creating a new Job while adding an Employee in the Manage Employees Function

31. Inheritance

- Pure
- Inherit and add
- Completely different