Master Data

Master Data needs to be populated by the system administrators before any of the sections become functional. It is not accessed when a disciplinary action is recorded and therefore it is required to be completed and updated at all times.

In the following sections, find a summary of the master data used to pre-configure the module.

Navigation

On the portal | Manage Employees | Search for Employee | Action | View/edit | Employee Relations | Master Data

1. Requirements and setup

There are several settings and configurations that need to be completed before this module will be fully functional. This module can be found under Manage Employees | Employee Relations.

The disciplinary process needs to be pre-configured and all the potential outcomes must be defined before it will be functional. Configuration is done in Master Data- it is discussed as the last section of this document.

Ensure that pop-ups are allowed on your web browser – the system will use popup windows during various stages of the disciplinary recording process.

Check that the Disciplinary Module is enabled for users. To enable Disciplinary Standard or Disciplinary Advanced follow the below path.

- Home | System Administration | Tools | Configuration | Framework | Configuration Settings | Human Resources | Industrial Relations.

Ensure that the Setting Value tick box icons next to “Enable Disciplinary Advanced Menu item”, “Enable Disciplinary Standard menu item” and “Module Active” are ticked.

2. Arbitration Outcome

Navigation

On the portal | Manage Employees | Search for Employee | Action | View/edit | Employee Relations | Master Data | Arbitration Outcome Type

There are 10 possible Arbitration Outcome Types available in the system and these cannot be added to or deleted from. They can however be edited to allow for company terminology.

To edit an outcome type, click anywhere on the grey bar.

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3. Disciplinary Action

Navigation

On the portal | Manage Employees | Search for Employee | Action | View/edit | Employee Relations | Master Data | Disciplinary Action

Disciplinary Actions relates to the offence category of the incident. In general, organisations differentiate between a few distinct categories, including Misconduct, Desertion, Incapacity and Disability.

4. Disciplinary Action Outcome

Navigation

On the portal | Manage Employees | Search for Employee | Action | View/edit | Employee Relations | Master Data | Disciplinary Action Outcome

The Disciplinary Action Outcome is used in the Details Tab of the Disciplinary Advanced Section. This is used to define the actions that were taken against the employee as a result of their actions.

5. Disciplinary Action/Action outcome Relationship List

Navigation

On the portal | Manage Employees | Search for Employee | Action | View/edit | Employee Relations | Master Data | Disciplinary Action / Action Outcome Relationship List

The Disciplinary Action Outcome Relationship Page allows administrators to link Disciplinary Categories with Outcome Tabs.

All of the preconfigured details will show in the summary table.

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6. Disciplinary Action/Action Outcome Relationship Detail

The Disciplinary Action / Action Outcome Relationship Detail window is where the administrator links different actions to open/closed different tabs.

- Disciplinary Action: Select from the list of Disciplinary Action items that have already been created.
- Disciplinary Action Outcome: Select the outcome that will be linked to the Disciplinary Action.
- Expiry Period (Months): Enter the number of months that the record will be valid for. Once the period has expired, it will automatically be removed for the employee’s record.
- Process: The different tabs that are available on the Signify Software HR Management Module are listed in this section, each with a tick box icon next to it. Click on any of the tick box icons that should be linked to the Disciplinary Action and Disciplinary Action Outcome List. More than one item can be selected. Once this combination is selected in the Details tab of Disciplinary Advanced section, these tabs will appear.

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7. Disciplinary Appeal Outcome Type

Navigation

On the portal | Manage Employees | Search for Employee | Action | View/edit | Employee Relations | Disciplinary Appeal Outcome Type

The Disciplinary Appeal outcome is used in Consultation Outcome.

There are only 2 possible Disciplinary Appeal Outcome Types created available in the system and these cannot be added to or deleted from. They can however be edited to allow for company terminology.

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8. Disciplinary Charge Type

Navigation

On the portal | Manage Employees | Search for Employee | Action | View/edit | Employee Relations | Master Data | Disciplinary Process Tabs

The Disciplinary Process Tabs links with the Disciplinary Action / Action Outcome Relationship. There are 10 Tabs available on the system. Each tab serves a specific function and it is not recommended to change these tabs without due consideration for the implications.

The content and the function of the tabs are not editable; however, the name and description of the tabs can be changed.

To change the name or description, click on the tab itself. This will open the Disciplinary Process Tabs

*Note the Default

Tabs are interlinked, and specific tabs will only load after information is provided on previous tabs. Therefore, a default tab must be selected and linked to other tabs to ensure that all the tabs are available. The tabs should follow each other in a logical sequence.

9. Dispute Reason

Navigation

On the portal | Manage Employees | Search for Employee | Action | View/edit | Employee Relations | Master Data | Dispute Reason

Dispute Reasons are used with Disputes.

10. Legal Representative Type

Navigation

On the portal | Manage Employees | Search for Employee | Action | View/edit | Employee Relations | Master Data | Legal Representative Type

Legal Representative Type is used to differentiate between the different roles of Legal Representatives. This is done on in Legal Representatives in the next section.

11. Legal Representatives

Navigation

On the portal | Manage Employees | Search for Employee | Action | View/edit | Employee Relations | Master Data | Legal Representatives

If the organisation makes regular use of a specific legal representative, then he/she can be added to the system to speed up the administration work.

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12. Rescission Referral Type

Navigation

On the portal | Manage Employees | Search for Employee | Action | View/edit | Employee Relations | Master Data | Rescission Referral Type

If a Dispute is referred to the Labour Court, it will be referred by a specific party. These parties can be configured in Master Data.

13. Disciplinary Actions

Navigation

On the portal | System Administration | Tools | Configuration | Specific Lists | Disciplinary Actions

The Disciplinary Standard discussed earlier requires the user to list the actions taken against an employee. These are pre-configured in the Specific Lists Section of the System.

To add a new item to the list, click on “Add New Disciplinary Actions” button. The “Specific Lists - Disciplinary Actions” window will Load.

After a record has been loaded, The Long Name, Short Name, and Order will show.

Disciplinary Type can also be added from this section. It was used by earlier version of the system. Should Disciplinary Type be required, the same process can be followed from the same section on the system.

14. Smart Nav

The Smart Navigation or “Smart Nav” function can be found throughout the module. It is used to search for employees within specific modules. Therefore, if the user is looking to add a specific disciplinary record to a specific employee, the Smart Nav function in the Employee Relations Module should be used. If the user wishes to edit an employee’s details, then the Smart Nav function in the Employee Profile section should be used.

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To find an employee, enter any of their personal details in the text box provided. Then click on “Smart Nav” to search for the employee. This will open a new window with details of all of the employees that match the criteria.

- If required, use the search function to change the search criteria. Enter the new criteria in the text box and click on “Search”. To clear the information in the text box, click on “Clear”
- Close: Click on “Close” to close the window and discard the search.
- Previous 20 || Next 20: Click “Previous 20 || Next 20” to move in-between pages.
- Click on the Employee (i.e. on the grey bar) to load their details. Doing this will close the window and load the employee’s details.

15. Documents

Documents that need to be recorded can be loaded when tab is available. These include Notices, Requests, Court Documents, or any other document that is required by the system.

To load a document, click on “Add” to load the “File Uploader” popup window. This window is discussed in detail below.

Loaded documents be can be viewed on the Documents Tab.

- Download File: Click on the “Download File” icon to download the file.
- Name: The name of the saved file will be provided here.
- Description: This is the description that the user provided.
- Document Type: The document type can be identified by the icon used.
- Delete: If the file was loaded incorrectly, it can be deleted by clicking on the “Delete” tick box icon and then on the “Delete” button.
- To edit the file or record, click on any area within the table to open the File Uploader.

16. File Uploader

Once the File Uploader Window has loaded, the file can be saved to the system. Note that the description field is mandatory and that The File Uploader only allows one file to be uploaded at a time.

- The Description is used to differentiate and search for the document.
  - Remember that other individuals can search for the documents using the description provided and therefore it is imperative that it is complete and representative of the information uploaded.
- Files can be uploaded by dragging them from your desktop or your files and dropping them in the white textbox. Files can also be loaded by clicking on the “Click Here” link to open your file browser. The process is discussed below.
- If you click on “Cancel” the window will be closed without adding any documents.

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