User Manual

- Getting Started with Job Profiler
- Guidelines to Job Profiler
- Create a new Job Profile
- Delete a Job Profile
- Version Control on Positions
- Unlocking Profiles En Masse
- Exporting the Job Profile Database
- Job Profiler: Quick Add Option
- List of Job Profiles
- Other Reports in Job Profiler
- System and Master Data Overview for Job Profiler

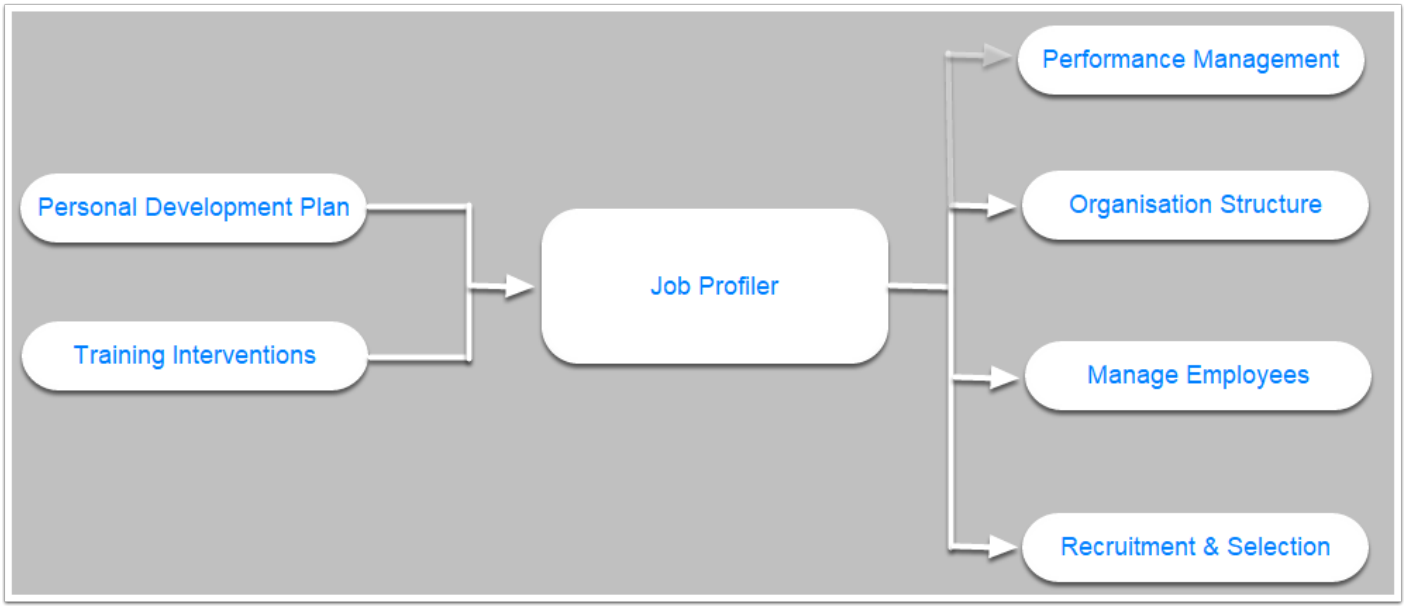
Getting Started with Job Profiler

Introduction to the Job Profile Module

The **Job Profile** module allows a user to define and create a profile or job description for every job in an organisation. A job consists of a number of attributes, one of which is positions which could inherit the job profile's attributes.

Modules Sharing Information With Job Profiler

The Job Profile Module shares information with other Signify HR modules. Find below a diagram indicating some of these relationships.



Definitions, Abbreviations and Acronyms

Terminology	Definition
Profile	A job description consists of job attributes and serving as a template for creating job positions. An employee is not appointed in a profile.
Position	A position belongs to a profile and depending on the settings, can inherit all or some of its parent profile's information. Employees are appointed in positions.
SETA	Sector Education & Training Authority
OFO	Organising Framework for Occupations
VARI	**V**eto decisions - **A**ssign tasks - **R**eward and recognition - **I** nitiate removal - Problem solving
Competency	Competency is the ability of an individual to perform a job properly.
KPA	Key Performance Area

The Menu Structure

Below is the menu structure, as seen by a System Administrator, BEFORE a specific job profile is selected.

1. Clicking the **Administration** tab would allow a user access to the Administrator lookup menu and other administration functionalities e.g. unlocking and deleting multiple profiles.
2. When a specific Job Profile is selected, the menu changes to allow access to the profile's attributes.



Search

The user will be able to search the database for job profiles by making use of the following search criteria:



The only field that requires a discussion is **Lock Status**. Below is the meaning of the different lock statuses. In essence this state protects profiles from being simultaneously changed by different users.

Status	Definition
All	Show both locked and not locked profiles.
Locked	When a normal user opens a new or a currently unlocked Job Profile, that profile is immediately locked (or limited) to that user’s name and he becomes the owner of the profile. A profile can be unlocked by a System Administrator or the Job Profile's owner. While the Job Profile is in a locked state, other users will only be able to view the profile.
Not Locked	When a Job Profile is not locked, the attributes can be edited by any user with access to the Job Profile module.

Guidelines to Job Profiler

The following guidelines and system rules could help to ensure better understanding and a more efficient approach while building job profiles into the system.

- Align the required new job profiles with the Organisational Plan and business strategy
- Determine the number of positions that will relate to the job profile
- Determine the number of generic items in the job profile and each related position
- Decide which position sections will not inherit their content from the job profile
- Complete a job profile in its entirety before creating positions for the job profile. In this way you will understand the job profile before its attributes are inherited to the positions.
- Understand the settings of a profile e.g. will the positions inherit an exact copy of the profile's attributes, can items be added to the inherited attributes or will the positions start with a clean attribute slate?
- Establish a naming convention to use when naming job profiles. E.g. it helps when the profiles are sorted first according to the type of job and then according to the job's physical location or level.

Organisational Structure - Profile - Positions - Employees

The following illustrations were compiled to explain the relationships between the organisation structure, positions and employees. Understanding this is crucial to understanding the place of a job profile in a company and understanding the place of a position on an organisation structure.

Step 1 - The Organisation Structure

A basic organisation structure is shown with three departments under the division.



Step 2 - The People in the Organisation

Below is an example of an extract from the employee database showing employees in the departments of the organisation structure:



Step 3 - Where the employees are located in the Organisation

As can be seen below, the employees are linked to one of the departments.



Step 4 - Employees are incumbents in a Position

Employees are incumbents in positions. There can be any number of similar positions but only one employee is allowed in a position.



Step 5 - Similar Positions are grouped into a Profile

Similar positions (even if there are minor differences between them) can be grouped under a single job profile which contains the job description and other attributes of the positions. A job profile acts like a template for its related child positions.



Create a new Job Profile

In this section we will create a new profile and then proceed to populate its attributes. Attention will be given only to a few prominent steps and fields. In this article you will learn how to:

- Add a new job profile
- Determine the inheritance rules
- Populate the job profile's attributes
- Work with positions on a job profile

Step 1: Add a Profile

Navigation from the Home page:

- ***System Administration*** **|** ***Modules*** **|** ***Job Management*** **|** ***Job Profiler*** to open the *Job Profile List* screen.



Job Profile List screen



Select **Add new Profile** to add a new Job Profile record.

Job Profile Detail Screen



Notes on completing the *Profile Detail* page

- Fields marked with a * are compulsory.
- Use the hand picker tool to search for standard library values on fields where this icon is displayed.
- Use the back arrow icon to clear a library field’s value.
- On the blank job profile page continue to enter the details of the new profile and select **Save** when done.

Step 2: Determine the inheritance rules

A very important decision needs to be made at this stage of compiling a job profile and it concerns the inheritance rules that should apply between a job profile and its child positions. In order to explain the concept of inheritance and the different versions thereof as implemented in the Job Profiler module, please review the definitions and illustrations given below.

We will be using the example of ladybugs to illustrate each inheritance option.

Standard inheritance (Child positions inherit the parent job profile's attributes)

Standard inheritance (Child positions inherit the parent job profile's attributes)
This setting is available on every child position record and applies only to the specific child position. The following rules apply to standard inheritance:

- If ticked the child position will be exactly the same as the parent profile.
- No changes to the child position are allowed.
- If this setting is switched on for an EXISTING child position all child-specific information currently in that child position will be overwritten with the parent profile’s information.

Inheritance Plus (Child Positions Inherit the Parent Profile’s Attributes And Additions can be made)



The setting to not only inherit the parent job profile's information, but also to allow adding information to the position profile, is available on the parent job profile's page. The following rules apply to the setting controlling inheritance plus:

- If not ticked the child position will be kept exactly the same as the parent profile.
- If ticked the child position will inherit the parent profile's information and additions to the child position's information will be allowed.
- Existing information from the parent profile as seen on the child positions cannot be changed or removed.
- If a job profile already has child-specific information added to its child positions and this setting is then switched off, all child-specific information will be deleted in order to make the child positions return to the standard inheritance profile.

No Inheritance (Child Positions Differ Completely From the Parent Job Profile)

No Inheritance (Child Positions Differ Completely From the Parent Job Profile)
To allow a child position's information to differ substantially from its parent profile, settings are available on every child position's attribute pages (e.g. Profile Detail, Notes, Documents, Positional Relationships, Access Rights as well as on the sections included in the Output and Requirements Profiles) with which to control this. The following rules apply to the settings controlling inheritance per position attribute:

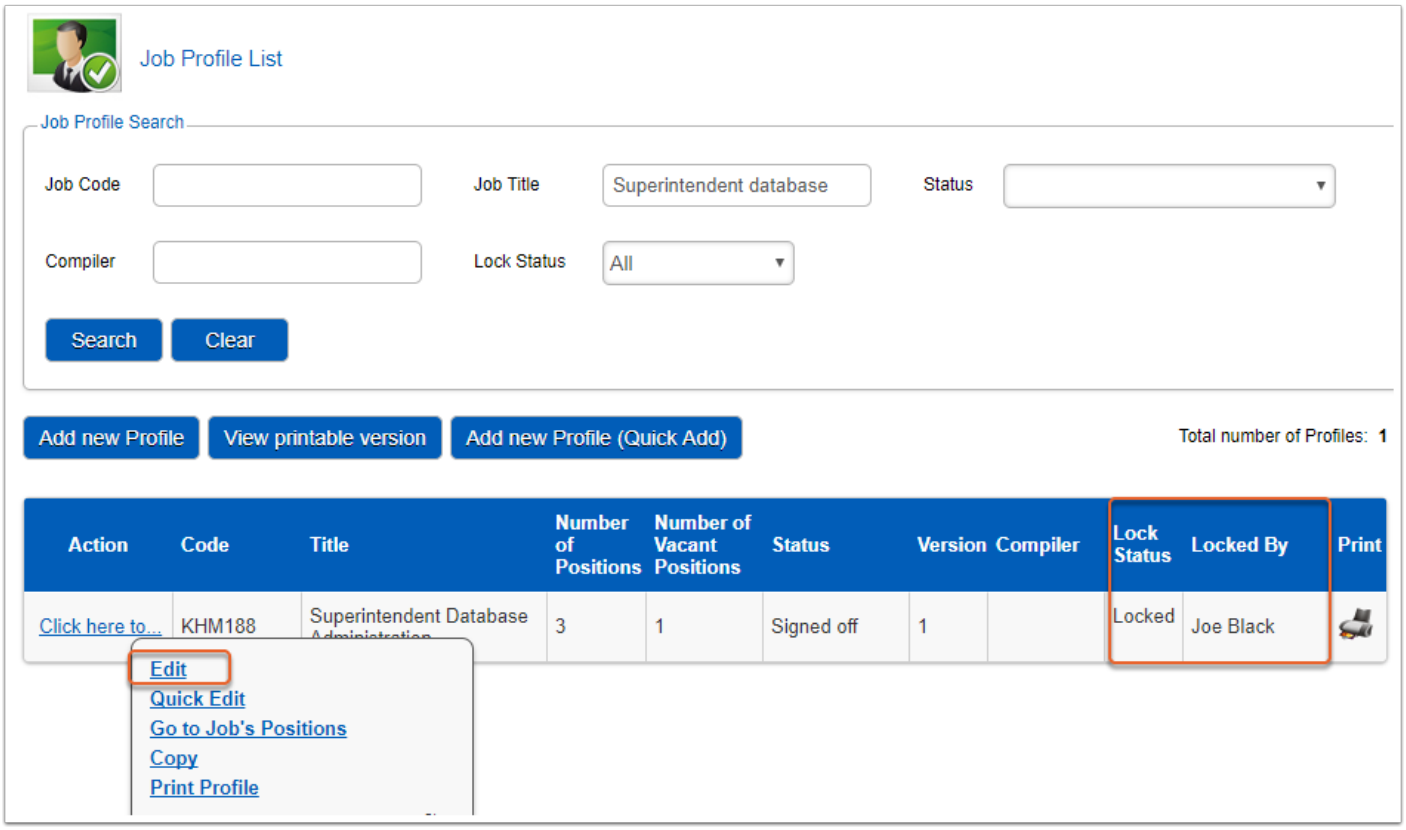
- If an attribute's *Inherit from Profile* setting is not ticked, the child position is allowed to differ completely from the parent profile.
- If ticked the child position will inherit the parent profile's information and:
  - Additions are allowed if the parent profile's setting *Allow adding on positions while inheriting* is switched on.
  - Additions are NOT allowed if the parent profile's setting *Allow adding on positions while inheriting* is switched off.
- If a position already has child-specific information added to it and the setting *Inherit from Profile* is switched on, all child-specific information on the attribute will be deleted in order to make the attribute of the child position return to the parent profile's attribute.

Unlock a Profile

When a user is working on a specific profile, the profile is locked and he will be the only person able to edit the job profile.

In some cases it would be necessary for another user to work on a profile not created by himself. Only a System Administrator is authorised to unlock a profile but for completeness' sake it will also be addressed here.

1. Confirm that the position is locked.
2. Select to open the specific locked Job Profile by clicking on **View** or **Edit** in the Action column.
3. In order to unlock this profile, select the **Unlock Profile** menu item.
4. The profile is unlocked and you are redirected back to the Job Profile List page.
5. Immediately after the job profile is opened it is locked again, but this time to the new user's profile.





Step 3: Populate the Job Profile's attributes

In this section examples are given of the different attributes that can be used to describe a job profile. Not all attributes are discussed in detail, but the most important attributes that require information relevant to a job profile in other modules in the system, will be discussed.

Add a Note to the Profile

On the profile’s menu, select **Notes** to open the screen below. This screen is actually used to manage outstanding tasks or activities on a profile.



On the **Job Profile Notes** screen select **Add a new Note** where any comments or notes pertaining to the profile can be recorded. A due date can also be assigned. These tasks are not allocated to a specific person but will lie against the profile.



Enter all the detail on the **Note Detail** window and select **Save.**



A report to list all these tasks against a profile is available under the Reports menu section.

Add a document to the Job Profile

Select the **Documents** menu item to display the **Job Profile Document List** screen.





Select **Add** to browse for a document and provide additional information.



Select **Save** to attach the document to the job profile.

Output Profile: Define the Job Intent

Expand the **Output Profile** section and select the **Job Intent** menu item to display the following **Job Intent** screen.



This screen has got two to four individual sections depending on a client's configuration. The screen's intention is to define a job's:

- Purpose
- Major Challenges a person in such a job would encounter
- Decision limits imposed on an incumbent
- Responsibilities
- Interactions with other role players

Examples of these screens are shown below.

Job Intent - Purpose



Job Intent - Major Challenges



Job Intent - Decision Limits



Job Intent - Responsibilities



Output Profile: Define the Career Path

Select on the **Career Path** menu item to open a screen where a typical career path for a specific job profile can be mapped.



The following screen is displayed showing up to five future positions for the selected Job Profile.



Output Profile: Define the Job Outputs

Select on the **Outputs** menu item to open a screen where typical outputs for a job can be defined. When any output record is added or opened, in addition to the actual output description, the following information is also required:

- Typical success indicators to identify the units of measurements that can be used to indicate whether outputs have been delivered successfully. A success indicator is not a standard or target. It is used in a performance contract to develop objectives and set targets.
- Typical outputs standard which are the minimum measurable criteria that outputs must conform to for successful performance.



The list of **Outputs** screen is displayed below. Click on the Edit icon to add **Success Indicators** and **Output Standards**.



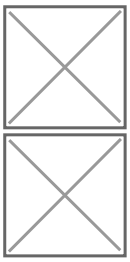
The Outputs screen is divided into three sections as follows:

- Outputs Section
- Success Indicators Section
- Output Standards Section



Output Profile: Key Performance Areas - KPA's

In the Output Profile section, select the **Key Performance Areas** menu item to display a list (if any) of KPA's that apply to the job profile being built.



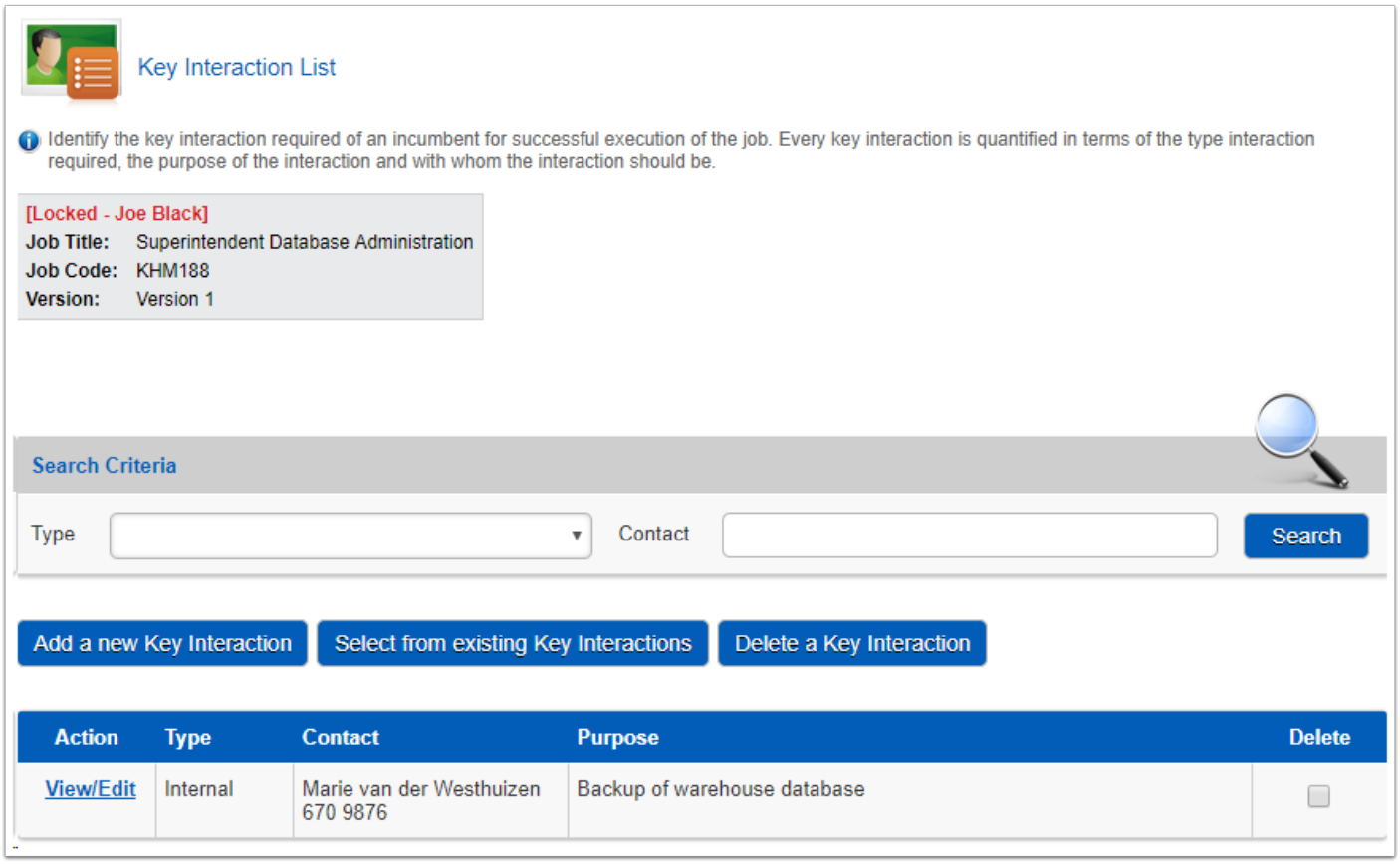
Output Profile: Define the Relevant Business Processes

Select the **Relevant Business Process** menu item to open a screen where business processes specifically impacted by the job profile being built are listed.



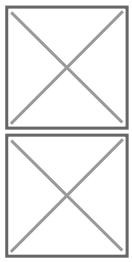
Output Profile: Key Interactions

Select the **Key Interactions** menu item to open a screen where key interactions are specified per incumbent to successfully execute his job.



Requirements Profile: Specify the required Qualifications

Expand the **Requirements Profile** section and select the **Qualifications** menu item to open a screen where required qualifications for a job profile can be listed.

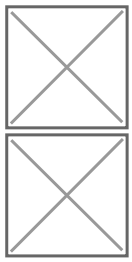


Select **Add a new Qualification** to add a new qualification to the library. This is done on the screen below. The qualifications added in this way become part of the library and can be edited and reused.



Requirements Profile: Specify the required Training

Expand the **Requirements Profile** section and select **Training Interventions** to open a screen where a list can be drawn up of courses a job's incumbent can be expected to go on or should have been on.



Select **Add** to add a training intervention to the list.



When adding an intervention to the list, the Training Intervention Detail screen opens in which the intervention can be defined.

- This screen draws its information from two sources - implying that they must have been populated before this section can be completed.
- Training Interventions (Accessible from the system’s Administration or Event Management modules)
- PDP fields (Accessible from the PDP module)

NOTE: The fields in the **For reporting purposes only** section has been developed for a specific client. The information is displayed in a report that has been developed for and used exclusively by them. The information does not have an influence on any other reports or fields within the system.

Requirements Profile: Specify the required PDP Performance Targets

This section of the Job Profiler module is used to set performance targets for an employee based on the job's Development Plan.

Expand the **Requirements Profile** section and select **PDP Performance Target** to open the screen shown below.




Select "Add" to add a performance target to the list.

When a performance target is added, the following details screen is used to select the values and targets:



Select **Save** to complete the performance target details or **Save add New** to save the current performance target and add another performance target.

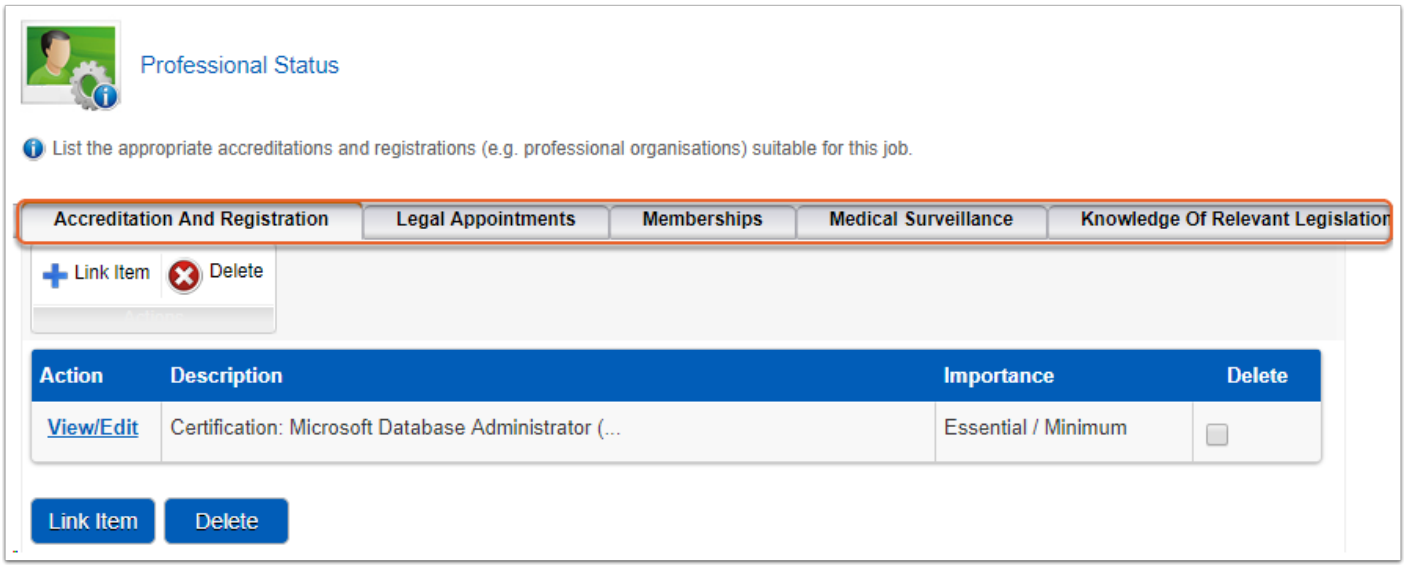
Requirements Profile: Specify the required Professional Statuses

Select the **Professional Status** menu item to open the screen shown below.



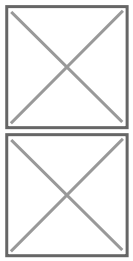
Lists the appropriate information suitable for a particular job. The following sections are available:

- Accreditation And Registration
- Legal Appointments
- Memberships
- Medical Surveillance
- Knowledge Of Relevant Legislation



Requirements Profile: Specify the required Experience

Expand the **Requirements Profile** section and select the **Experience** menu item to open a screen where an indication can be given of the number of years that a successful applicant/incumbent should have functioned in a specific functional area, business process and/or place in a specific capacity.



Requirements Profile: Specify the required Skill

Expand the **Requirements Profile** section and select the **Skills** menu item to open a screen where a list of skills can be drawn up that a successful applicant/incumbent should have.



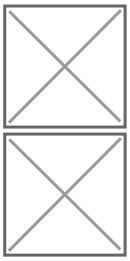
Requirements Profile: Specify the required Competencies

Expand the **Requirements Profile** section and select the **Competencies** menu item to open a list of competencies expected in the successful applicant/incumbent.



Competency is the ability of an individual to perform a job properly.

When adding or editing a competency, the following screen will appear:



Requirements Profile: Specify the required Knowledge and Skills

Expand the **Requirements Profile** section and select the **Knowledge and Skills** menu item to open a screen where, for the successful applicant/incumbent, less formal types of skills and qualifications can be listed.

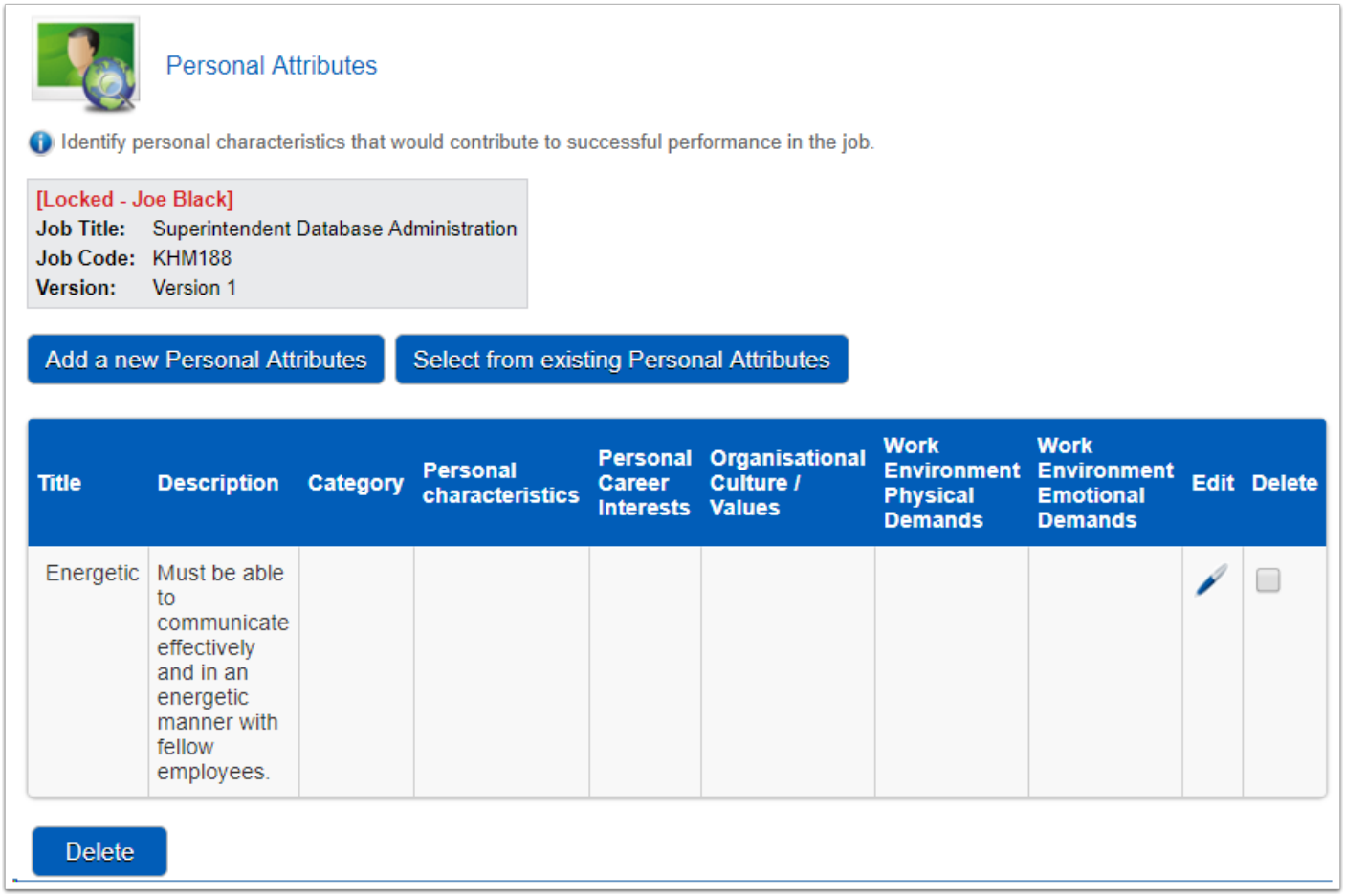


Requirements Profile: Specify the Personal Attributes

Expand the **Requirements Profile** section and select the **Personal Attributes** menu item to open the screen shown below.

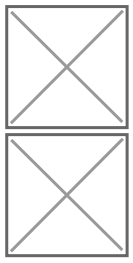


This screen lists all the desirable qualities and personal attributes one would like to see in the successful applicant/incumbent.



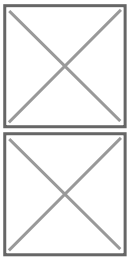
Requirements Profile: Specify the Driving License

Expand the **Requirements Profile** section and select the **Driving License** menu item to open the screen shown below



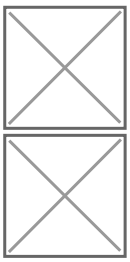
Requirements Profile: Specify the Programmes

Expand the **Requirements Profile** section and select the **Programmes** menu item to open the screen shown below.



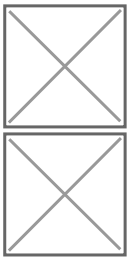
Requirements Profile: Specify the Unit Standards

Expand the **Requirements Profile** section and select the **Unit Standards** menu item to open the screen shown below.



Requirements Profile: Specify the Licenses

Expand the **Requirements Profile** section and select the **Licenses** menu item to open the screen shown below.



Step 4: How to work with Positions on a Job Profile

The **Positions** section is addressed separate from the other job profile attributes for the following reasons:

- A job profile can have multiple positions linked to it.
- A position has exactly the same set of characteristics as the parent profile.
- A position can inherit its parent profile's attributes.
- When a position is opened for editing, the Job Profile module's look and feel stays exactly the same on all screens as for the profile BUT it now functions on a position level.

Positions as a special attribute of a Profile

It is important to understand how the system handles positions. A position is linked to a profile but it is also handled as a special case of a profile in that the same attributes of the profile are also available to the position as can be seen from the following diagram.



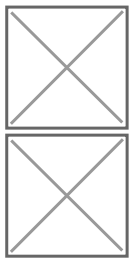
For example, the job profile can have notes recorded against it. When one of the job profile's positions is opened, that position can also have notes recorded against it. (It can either inherit the profile's notes or it can have its own set of notes.)

Here follows an example of a position created for a job profile. We will repeat all the steps to get from the profile to the position.

- Select PROFILE SEARCH to open the Job Profile List screen.
- Select the applicable job profile from the list.



From the Job Profile menu, select **Positions** to open the list of positions linked to this profile.



Inheriting the attributes of the Profile to the Position

The position that we are working on automatically has all the attribute SECTIONS that the profile had but it does not automatically inherit the information contained IN the profile's sections.

Near the top of the **Profile Detail** screen is a check box which must be specifically ticked for EVERY position that is supposed to inherit the attributes of its parent profile. More on this can be found in the section *Child Positions Inherit the Parent Profile's Attributes.*



This position will now inherit the parent profile's attributes. If any one of the attribute sections of a position is opened, the following can be seen:

- The tick in the check box at the top of the page indicates that on this particular position the attributes are inherited from the parent job profile.
- The example below shows that all the Outputs attributes were inherited from the parent's profile, and there is space for position-specific outputs to be loaded as well.



The attributes of a Position

Under the **Job Profile** menu, the user can set the following attributes of the position taking into consideration the rules referred to in the section *Child Positions Inherit the Parent Profile's Attributes*



Manage a Position

Three main actions are possible on the Job Profile Positions List screen:

- Select **Add a new Position** to open a blank position screen for adding a new position.
- Select **View printable version** to open a printer-friendly version of the position list page.
- Select the **Click here to...** hyperlink to display the following options:
  - Edit
  - Copy
  - Move
  - Print Template



Edit a Position

Select **Edit** and note the following changes:

- The menu reflects that this is a child position and not the parent profile. (Indicated on the right)
- The screen’s heading has changed to also reflect that a position is being edited Position Profile
- The position profile screen background is a subtle grey,whereas the job profile screen has a white background.
- The profile detail screen is displayed indicating the options as illustrated below:



Copy a Position

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).

- 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



Move a Position

An existing position can be copied to another existing job Profile.

- Choose the position to be moved.
- In the position's **Action** field, select ***Click Here To....*** | ***Move***.
- Select the New Job Profile by clicking on the hand picker.
- Select **Validate**



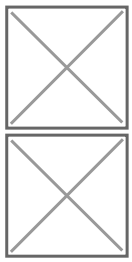
The Move Job Position screen is divided into 4 sections:

- **Heading and selection**
- **Validation info** - all information that will be deleted, added or applied when the move process is complete.
- **Last Position** - you can delete the position profile if it the last position on the Job Profile.
- **Additional information** - summarises all the rules when a position is moved.

Select that you agree with the changes and **Continue**.







Print a Template

Select **Export** to generate a Job Position Profile report as shown in the example below.



Job Position Profile Report



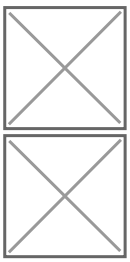
Delete a Job Profile

In this section you will learn how to delete a job profile. Deleting job profiles is a protected right given only to the Job Profile Administrator.

Navigation from the Home page:

- ***System Administration*** **|** ***Modules*** **|** ***Job Management*** **|** ***Job Profiler*** to open the *Job Profile List* screen.

- In order to delete an existing job profile, select to open **Administration** from the side menu.
- Select to expand the **Configuration Settings**.
- Select **Delete Job Profiles** to open the following screen where a list of all job profiles can be seen.



- Search for and locate the applicable job profile you want to delete.
- Select the **Delete** check box.
- Select **Delete** to display the following confirmation message.



- Select **OK** to confirm the delete action.

How to Delete Locked Job Profiles

When a job profile displays the **Lock** icon it means the job profile cannot be deleted since there are employees appointed in positions linked to this profile. The steps required to open up such a profile for deletion are the following:

- From the main Job Profile screen (**Job Profile**) locate the profile and go to its positions.
- Check each position for, and note, its incumbent.

- From the **Manage Employees** module, locate each position’s incumbent and terminate either the employee entirely or only the selected position of the employee.
- Return to the **Delete Job Profiles** screen and delete the profile.

Version Control on Positions

A basic versioning methodology is available in the Job Profiler module and is focused primarily on maintaining position version integrity. The implementation of this methodology is done as follows:

- Versioning is implemented on a position level, not a job profile level since a profile is in essence a template.
- When a job profile is given a new version number, the aim is to preserve the version integrity of all positions currently linked to the job profile while allowing new positions to be added against the new version of the job profile.
- A position’s current version is maintained because, when a new version number is assigned to its parent profile, the inheritance from the parent profile is dropped. The inheritance can be manually reinstated for each position if required.
- Although inheritance from the parent profile to its positions is dropped when a profile’s version is changed, all information on the profile’s first page (The Position Profile page) is always inherited to its child positions.
- If a position’s inheritance is switched on again, the position will assume the same version as the job profile.

To illustrate this, review the following diagrams. We will be using the familiar standard inheritance illustrations.

In the first illustration, the job profile has one position linked to it and the inheritance is switched on, meaning the position has the same characteristics as its parent profile.



In the second illustration, the job profile is assigned a new version number. The position’s inheritance is automatically switched off (except for the Position Profile page) and the position remains on version 1, keeping all characteristics intact.



Changes now made to either the profile or the position will not affect the other (again excepting the Position Profile page).

In the third illustration, a new position was added to the new version of the job profile. This position is automatically assigned the new profile version’s number.

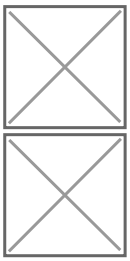


Unlocking Profiles En Masse

When a Job Profile is opened the first time, it is locked for exclusive use by the user who opened it. From there on it can only be edited by this user until he/she explicitly unlocks the profile so that another user can open it. When the next user opens it, it is again locked for exclusive use by the new user. In this fashion, all job profiles will eventually be locked for editing by somebody.

If it is required to unlock all or a number of job profiles at once, use the following functionality:

- Select to open **Administration** from the side menu.
- Select to expand **Configuration**.
- Select **Locked Profiles** to open the following screen where a list of job profiles can be seen.

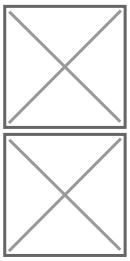


- Select the check box's next to profiles to be unlocked.
- Select **Unlock Profiles.**

Exporting the Job Profile Database

A well-defined job profile contains a lot of information. If it is required to export the information for whatever purpose, use the following functionality.

- Select to open **Administration** from the side menu.
- Select to expand **Configuration**.
- Select **Export Database** to open the following screen.



Export to Excel

- Select **Export to excel** to display the following export options.



Note:

When running any of these export options, bear in mind that a substantial amount of data is being compiled and formatted before it can be exported to Excel. The export action can therefore be expected to take quite a while.

1. Libraries

This option exports all the standardised library information used to build up a profile in separate Excel sheets i.e. Grading Type, Grading Scale, Accreditation and Registration, Business Process, Competencies etc.

- Select the **Libraries.xls** hyperlink to export the following file:



Note:

Every library item’s primary key (PK) is part of the export. This PK is what binds the library item to a field in the job profile itself.

2. Job Profiles

This option exports the job profiles with their fields i.e. Job Profiles, Grading Scale, Major Challenges, Decision Limits, Career Path, VARI etc.

- Select the **JobProfiles.xls** hyperlink to export the following file.



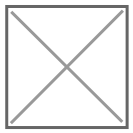
Note:

All fields that got their information from a lookup or dropdown will only display the dropdown value’s PK. E.g. for the first job profile above its *Status* field’s PK is 0001. Use this PK to lookup the actual value (e.g. Finalised) in the **Libraries** export file.

3. Position Profiles

This option exports a list of positions linked to the profiles in the **JobProfiles** export above.

- Select the **PositionProfiles.xls** hyperlink to export the following file.



Note:

- The JobFK (Column N) field binds the position to its parent profile.
- As for the job profiles, all fields that got their information from a lookup or dropdown will only display the dropdown value’s PK. Use this PK to lookup the actual value (e.g. Finalised) in the **Libraries** export file

Export template to Excel

- Select **Export template to excel** to display the following template options.



- The same three Excel files as discussed above are exported but without data.
- If properly populated by a client, the data on these templates can be imported into the system.

1. Libraries Template

This option creates a template in which standard library information can be provided for importing into the Job Profiler module.

- Select the **LibrariesTemplate.xls** hyperlink to export the following file.



Note:

When populating this template the system's PK, Export PK etc. values have not yet been assigned. Therefore, only the *Description* field can be completed. An attempt should be made to at least give some indication of which library value is used in which job profile field in the next template.

2. Job Profile Template

This option creates a template in which job profile information can be provided for importing into the Job Profiler module.

- Select the **JobProfilesTemplate.xls** hyperlink to export the following file.



3. Position Profile Template

This option creates a template in which a job profile's position information can be provided for importing into the Job Profiler module.

- Select the **PositionProfilesTemplate.xls** hyperlink to export the following file.



Clear Export Tables

When exporting information, the system has to compile and format the data into the three export files discussed above. This is done via the use of temporary tables in the database. If the information is to be exported again, be sure to select **Clear export tables** to clean out all previously compiled export information.

Job Profiler: Quick Add Option

An alternative to creating the full job profile is to use the **Add New Profile (Quick Add)** button on the Job Profile List screen, this option enables the user to create a job profile that includes the most important details relating to the new position, without completing all the available fields.

When using the quick add option, it is however advised to complete the profile in as much detail as possible, as the information that is entered onto the profile is linked to other modules in the system.



- Select **Add new Profile (Quick Add)** to create a job profile that contains only the most important required information.
- On the **Profile Detail** screen, an accordion style menu, becomes available displaying the following options:
  - Step 1 Job Information
  - Step 2 Career Path
  - Step 3 Job Description
  - Step 4 Key Performance Outputs
  - Step 5 Job Requirements (Education/Qualification)
  - Step 6 Job Requirements (Experience)
  - Step 7 Job Requirements (Technical Skill Set)
  - Step 8 Key Competencies
  - Step 9 Job-Fit Attributes

The screens on the profile detail screen are self-explanatory, with only two requirements:

- Once all the information has been entered on a step, the **Save** button must be selected in order save the changes made.
- In order to proceed to the next step, the previous step must be completed.

The screenshots included provide an indication of what the screen will look like once information has been entered.



Step 1 - Job Information

Once all information relating to the job information have been entered and saved, the **Proceed to step …** button becomes available.



Step 2 - Career Path

The fields on this screen are free text field and not linked to positions with the same name as given here.

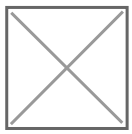


Step 3 - Job Description

Depending on the selected tab, the information that is required will change.



Step 4 - Key Performance Outputs



Step 5 - Job Requirements (Education/Qualification)

Qualifications listed here are the same qualifications as listed in the qualifications library accessed via System Administration.



Step 6 -Job Requirements (Experience)



Step 7 - Job Requirements (Technical Skill Set)



Step 8 - Key Competencies



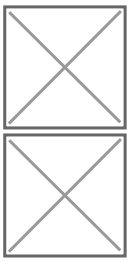
Step 9 - Job-Fit Attributes



List of Job Profiles

On the Job Profile List page, you have the option to view a printer-friendly version of a report listing all the job profiles.

- Select **View printable version** to open this page.
- Select **Print Report** to open the report shown below.



Other Reports in Job Profiler

Under Job Profile on the menu, select to expand **Reports**. The reports shown below are examples of the reports found here.



Outputs Report

When the **Outputs Report** hyperlink is selected, a list of the Job Profile's Outputs are shown. The report can be printed or exported in Word format.



Complete Job Profile Report

- Select the **Job Profile** hyperlink to view the Job Profile Report in Word format.
- Reports available for export in the dropdown need to be configured by Signify.





System and Master Data Overview for Job Profiler

The diagram below provides a quick reference of the different data types. A description of each data type follows the diagram.



System Data

The Job Profiler module is pre-configured with a few sets of data that do not change often. Changes to these sets can only be made by the developers.

Optional System Data

If the optional system data is not provided the system will still function correctly.

Dynamic Libraries

As users participate in creating job profiles, a library is created from their entries. The library is therefore a summary of all previously entered values and is available to the user for re-use. A company can however opt to pre-populate the libraries with or without the option for users to add to the library.

Master Data

The Job Profiler module cannot function properly without this information. A company must provide the master data in the correct format for population before the system is installed. A set of master data templates is available.

Master Data Requirements

In order to properly configure the job profiler module, the following data is used. The records marked REQUIRED are the minimum that should be provided by the company.

Master Data	***Type***	***Description***

Compilers	Optional	A list of people who are responsible for job profile creation in a company.
Profile Status	System Required	A list of statuses a profile goes through from being created to being finalised e.g. Draft, Finalised etc.
Company Values	Optional	A list of company values. These will automatically become part of every job profile and are also pulled through when a performance contract is created for an employee.
Job Family	Optional	It is sometimes needed to group job profiles with potentially different titles into a job family. Provide here a list of these families. The linking takes place on a profile's Job Profile screen.
Position Family	Optional	It is sometimes needed to group positions with potentially different titles into a position family. Provided here a list of these families. The linking takes place on a position's Position Profile screen.
Work Levels	Optional	Kept for legacy purposes.
Level of Work Matrix	Optional	Kept for legacy purposes.
Competency Categories	Library	A list of categories which will be used to categorise competencies when they are added. Examples are Abilities, Attitudes, Drives,Emotions etc.
Competency Groups	Library	A list of groups which willbe used to group competencies when they are added. Examples are Cognition,Communication, Interaction with Others, Personal Effectiveness etc.
Competency Levels	Required	The levels (e.g. expert)that will be used to indicate the desired level of a competency.
Competency List	Library	The title and description of standardised competencies. If not pre-populated ensure that the setting Competencies under Library Adding is set to YES to allow the users to add their own competencies.

Competency Matrix	Library	Link a grading scale (e.g.Paterson A1) to a competency (e.g. Attention to Detail) and indicate the level(e.g. 1-4) at which a person on this grading scale should be able to perform.
Proficiency Matrix	Library	Link one or all gradingscales (e.g. Paterson A1) to a competency (e.g. Attention to Detail) andindicate the level (e.g. 1-4) at which a person on this grading scale should beable to perform. Then, edit eachcompetency level and either provide a summary of the proficiencies required orload the proficiencies one by one. If a summary is loaded, only an overall rating is possible on the employee's performance contract; if loaded one by one, individual ratings are possible.
Accreditation &Registration	Library	A list of all relevant accreditation and registration authorities. If not pre-populated ensure that the setting Accreditation & Registration under Library Adding is set to YES to allow the users to add their own accreditations and registrations.
Legal Appointments	Library	A list of all possible company required "legal" appointments. This list could include entries like licenses, permits etc. If not pre-populated ensure that the setting Legal Appointments under Library Adding is set to YES to allow the users to add their own legal appointments.
Memberships	Library	A list of all memberships that could form part of a job profile. If not pre-populated ensure that the setting Memberships under Library Adding is set to YES to allow the users to add their own memberships.
Knowledge of Relevant Legislation	Library	A list of legislation that a job applicant/incumbent should have knowledge off.
Package Types	Required	A list of salary package types e.g. Package, Non-Package etc. This list is also used when setting up the grading scales.
Grading Types	Required	A list grading types e.g.Paterson, Hay, Peromnes etc. This list is also used when setting up the grading scales.

Grading Scales	Required	Specify the different subdivisions/scales (e.g. A1, A2, A3) in each grading type (e.g. Paterson) by making use of the package and grading types.
Occupational Categories	System Required	The standard SETA occupational categories e.g. top management, senior management etc.
Occupational Levels	System Required	The standard SETA occupational levels e.g. professionals, clerks etc.
OFO Codes		The official Organising Framework of Occupations codes as defined by the South African Education and Training Authority (SETA).
Qualifications	Library	A standardised list of qualifications. If not pre-populated ensure that the setting Qualifications under Library Adding is set to YES to allow the users to add their own qualifications.
NQF Levels	System Required	The list of standard NQF levels.
Business Processes	Library	List the business processes that form part of or define jobs.
Driving Licences	Library	List of official driving licence codes and descriptions.
Programmes	Library	A skills programme to which site specific subjects/standards can be added.
Standards	Library	A module or practical subject used to define a skills programme. A government defined module is called a “unit standard”. A site specific module added by a company is called a standard. In this document reference is made to “standards” to include both.
Licences	Library	Licenses that are position specific, with the aim at organisations that require strict management of licenses in terms of government legislation.
Importance	System Required	Indicate the relative importance of various records in the system e.g. qualifications, legal appointments, memberships, etc.
Involvement	System Required	The type of responsibility a person could typically have in different positions.

Note Status	System Required	Pending or Completed.
Experience	Library	A library of possible job experience in terms of responsibility, years of experience and relative importance.
Knowledge and Skills	Library	A library of possible job knowledge and skills and their relative importance.
Personal Attributes	Library	A library of personal attributes desired for jobs.
Access Rights Category	Library	A list of access rights categories (e.g. Computer Systems) into which specific access rights can be placed e.g. read/write rights etc.
Access Rights Responsible Employee	Library	The people listed here will all receive emails when an employee is either: • Appointed - in order to issue his access rights. • Terminated - in order to revoke his access rights.

System Settings

The table of available settings below are used to even further customise the system for a company. Familiarise yourself with the settings in order to make the most appropriate decision.

Setting	***Description***
General	
Enable Output Standards On Outputs	Show output standards in addition to success indicators on the output detail form.
Enable Configuration Of Positions Per Profile	This allows the system to not only compile a job profile but also to add “child” positions underneath the profile.
Grading Type Used By Competency Matrix	In the System Administration section the selected grading type will form the basis for the competency matrix.
Grading Scale Experience Measure Item	Specify the grading scale that will be used to display a help guideline in terms of years’ experience on the Experience form.
Inheritance	

Setting	*Description*
Allow Position Level Add While Inheriting	When ticked, this setting allows you to add position-specific information in addition to the information inherited from the profile. (e.g. inherit the job profile's major challenges but you can also add position-specific challenges)
Allow Inheritance Link Removal	When ticked, this setting places a check box (called "Inherit from Profile") on all position related forms. You then have the following two options: • Keep the tick-mark to automatically display the profile's information IN ADDITION to the position-specific information. You cannot change the inherited information. • Remove the tick-mark to enable you to make changes to the information inherited from the profile. You will still be able to add position-specific information as well. Just note that changes now made to the job profile will NOT reflect on the position because the two have been de-linked.
Job Intent	
Show Job Purpose	When ticked this setting will display a PURPOSE field at the top of the Job Intent page.
Library Adding	
Qualifications	Allow users to add their own qualifications to the existing library of qualifications.
Accreditation & Registration	Allow users to add their own accreditations and registrations to the existing library of accreditations and registrations.
Legal Appointments	Allow users to add their own legal appointments to the existing library of legal appointments.
Membership	Allow users to add their own memberships to the existing library of memberships.
Competencies	Allow users to add their own competencies to the existing library of competencies.
Library Competencies	
Show Competency Group	Show or hide the fields on the administration competency list form.
Show Competency Category	
Show Competency Level	
Show Competency NQF Level	
Show Competency Content Block	

Setting	*Description*
Show Competency Criteria Block	
Show Competency Context Block	
Profile Competencies	
Show Importance	Show or hide the fields on the profile competency detail form.
Show Competency Group	
Show Competency Category	
Show Competency Level	
Show Competency NQF Level	
Show Competency Content Block	
Show Competency Criteria Block	
Show Competency Context Block	
Definitions	
Requirements Profile Definition	Provide the definition that will be displayed on the requirements profile form.
Competency Definition	Provide the definition that will be displayed by the help button on the competency list form.
Professional Status Definition	Provide the definition that will be displayed on the professional status form.

Setting up a Key Competency Library in the Job Profiler Module

Key competencies and their defining proficiencies form part of a job's profile as compiled in the **Job Profiler** module. In **Job Profiler,** a number of characteristics are used to profile or describe a job and subsequently also the positions derived from it. A key competency is one of those characteristics.

When adding key competencies to your performance contract, the competencies are read from the library maintained in the **Job Profiler** module.

The following steps are needed to configure and build up the libraries. Screen examples are shown below.

1. Specify Competency Categories e.g. Adaptabilty, Delivery, Influence, Thought etc.

2. Specify Competency Groups e.g. Cognition, Communication, Interaction with Others, Personal Effectiveness etc.
3. Specify Competency Levels e.g. Expert
4. Load Competencies



Two steps are needed to ensure that the competencies are available for selection:

Step 1:

From the **Competencies** item under **Library Administration**, select the **Proficiency Matrix** item.

Add the competency for which proficiencies are to be specified.

Step 2:

Specify the Proficiencies per Competency. A competency can have proficiencies applicable to a number of levels.

For each competency, work through all the levels in order to specify the proficiencies.

Before proceeding to populate the list of proficiencies a very important question now needs answering with regards to the rating of proficiencies on an employee's performance agreement:

1. For a competency, is the goal to rate its proficiencies as one combined entity?
2. Or is the goal to rate a competency's proficiencies as separate entities, each having its own rating.

The answer to these questions would determine which section below would be used to populate the list of proficiencies.

Rate Proficiencies as One Entity

If a competency's proficiencies will be rated as one entity, only one proficiency should be added to the proficiency list.

In the example below, the **Description** field contains a combined proficiency for the competency under discussion.

To create a proficiency list from this Description field, add a blank Proficiency and copy the Description field to the proficiency.

- Select **ADD** to create the blank Proficiency record.
- Copy the Description field's contents to the new proficiency record and select **SAVE**.

When this competency is pulled into an employee's performance management agreement, only one combined proficiency record will show, therefore allowing only one overall rating for the competency.

Rate Proficiencies as Separate Entities

If a competency's proficiencies will be rated separately, separate proficiencies should be added to the proficiency list.

In the example below, the **Description** field contains a combined proficiency for the competency under discussion.

To create a proficiency list from this Description field, add a blank Proficiency and then copy each individual proficiency from the Description field to its new proficiency record.

- Select **ADD** to create the blank Proficiency record.
- Copy the first proficiency from the Description field's contents to the new proficiency record and select **SAVE**.
- Do this for every proficiency. The final proficiency list is shown below.

Note that the individual records are still combined into a Description field.

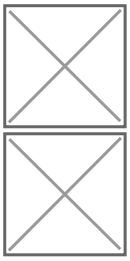
When this competency is pulled into an employee's performance management agreement, multiple proficiency records will show for this competency, therefore allowing one rating for each proficiency.

- **Link Competencies to a Job Profile**

The next step before a competency will be visible against an employee's position and therefore in the employee's performance agreement is to link the competency to the employee's job profile.

- Locate the appropriate job profile in the **Job Profiler** module.
- Select to open the profile.

- From the Job Profiler’s side menu, locate and select **Competencies**.
- Either add new competencies directly to the profile **Add new Competencies** or link competencies from the Competency Library by clicking **Link Competencies**

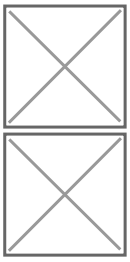


Setting up Values and Behaviours Library in the Job Profiler Module

Values and Behaviours form part of a job’s profile as compiled in the **Job Profiler** module. In **Job Profiler,** a number of characteristics are used to profile or describe a job and subsequently also the positions derived from it. Values and Behaviours is one of those characteristics.

When adding Values and Behaviours to your performance contract, the Values and Behaviours are read from the library maintained in the **Job Profiler** module.

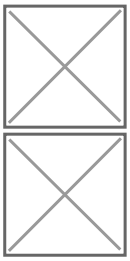
- Open the Job Profiler module.
- Open its Administration menu.
- Expand the **Settings** menu item and locate the **Company Values List**.
- Add appropriate values and corresponding behaviours.



Building the "Knowledge of Relevant Legislation" Library

This library is used when selecting values for the Knowledge of Relevant Legislation that forms part of a job’s Professional Status.

- Open the Job Profiler module.
- Select *Administration* | *Library Administration*| *Professional Status* | *Knowledge of Relevant Legislation* from the side menu bar.



Changing the Report Logo

The Job Profiler module is issued with standard job profile and position reports. If the logo needs to be replaced it can be done as follows.

- Open the **Administration** section and navigate to the **Company Logos** item to display the following screen.
- Tick the check box **Upload a Company Logo** to expand a section where a new logo can be uploaded.

