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Getting Started

Introduction to the Manage Employees Module

The *Manage Employees* module allows a user not only to create and manage an employee's records but also serves as a complete organisational reference for everything pertaining to an employee. Although the actual Signify HR module is mainly concerned with employee records, in this manual we will cover some aspects of the employee life cycle - from his application for a position and his eventual appointment, training records, personal details etc. are addressed although not to the same level of detail.

Target Audience

Some information in this module is in the domain of the employee and is open to him/her for updating. The rest is mostly confidential and will be managed by HR personnel.

Prerequisites

- For general employees basic computer skills should suffice.
- For HR personnel, good computer skills should be matched by excellent human resources knowledge.
- Successful completion of the following Signify HR training modules
  - Signify HR Login and Landing Page
- Appropriately configured master data for the *Manage Employees* module.

Other Considerations

Most other modules in the Signify HR Suite rely on accurate personnel and human resource information coming from this module. It is therefore imperative that the sections in this module

that are going to be used are well designed, their purpose clear, adequate resources be made available for their maintenance but above all that a firm hand controls and guides what goes in and what goes out of the module.

Definitions, Abbreviations and Acronyms

Terminology	Definition
PDP	Personal Development Plan
RPL	Recognition of Prior Learning
Schema	The system caters for multiple companies (belonging to the same group of companies) to co-exist in the same database. This enables data sharing, seamless transfer of employee etc. Each company is called a schema in the database.

How to Access Manage Employees Module

Navigation from the Home page:

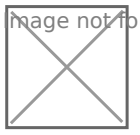
- ***System Administration*** **|** ***Modules*** **|** ***Manage Employees*** to open the Manage Employees module.

The Focus of the Signify HR Modules

The Life Cycle of an Employee

In this section a short description is given of each module that forms part of the employee life cycle as implemented by the Signify HR system.

As an introduction to this life cycle, view the diagram below that displays these modules.



Job Profiling

Define and describe the characteristics of the jobs - and their subsequent positions - that an organisation is going to have. (*Refer to the Job Profiler training manual for more information)*

Organisation Structure

Define the hierarchical levels of an organisation and build the organisation structure. Link the appropriate positions from the job profiler module to the organisation. (*Refer to the Organisation Structure training manual for more information)*

Recruitment & Selection

Advertise positions in an organisation and manage the applications. *(Refer to the Recruitment & Selection training manual for more information)*

Employee Administration

- Appoint employee in a position
- Capture and maintain employee details
- Capture previous work experience
- Employee relations

- Movement
- Report to structures
- Employment equity and reporting
- Service termination
- Compliance management (FAIS, EE, SD, OHS)
- Managing Users
- Employee and Manager Self-service

Performance Management

Performance contract; Performance evaluations; Personal Development Plan (*Refer to the Performance Management training manual for more information)*

Talent Management

Management of the talents and potential for employees. (*Refer to the Talent Management training manual for more information)*

Employee Development

Capture and maintain learner records and history

Learning Management

- Event Management
- Create learning pathways
- Manage learning guides

(Refer to the respective training manuals for more information)

Employee Evaluations & Satisfaction Surveys

Enable employees to do a 360° evaluation.

Leave Management

Configure a company’s leave rules and administrate employee leave transactions.

How to Appoint an Employee

This section assists the System Administrator in adding employees to Signify HR system. There are three options available for appointing an employee. In this section, only the first two options will be discussed.

1. Appoint a new employee
2. Appoint new employee (Quick)
3. Appoint employee being transferred from another company/schema (see article Appoint Employee being Transferred)

Open the Manage Employees Module

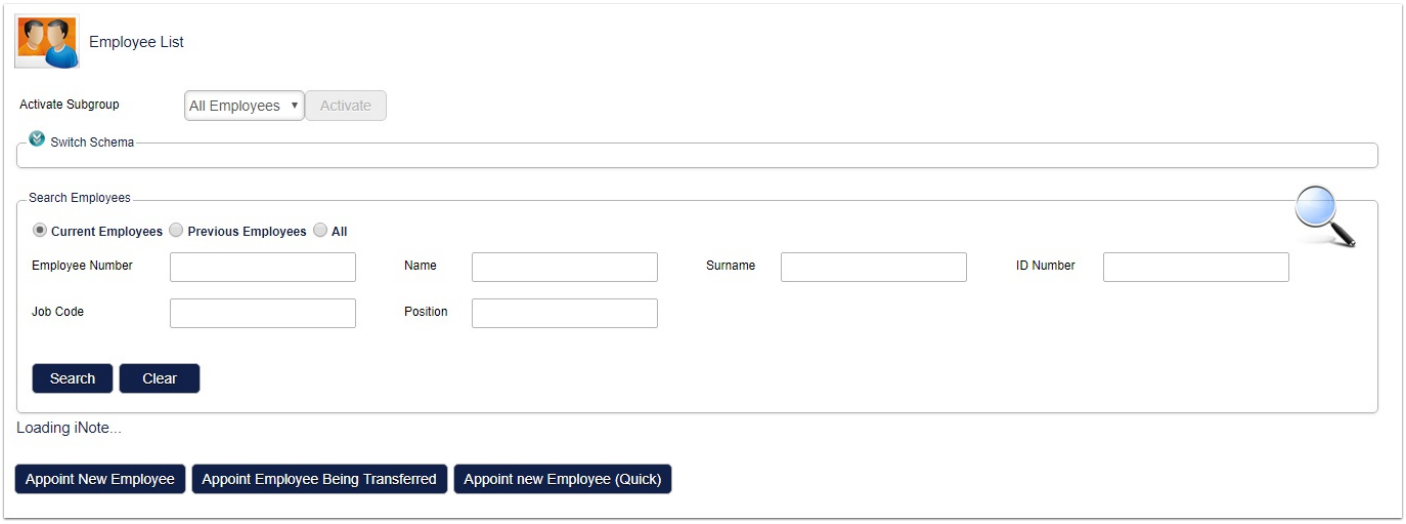
Navigation from the Home page:

- ***System Administration*** **|** ***Modules*** **|** ***Manage Employees*** to open the Employee List screen.

Employee List Search

When the screen is opened, the page will be empty i.e. no employee records will be displayed. The search criteria will be linked to your active subgroup. You can provide additional search criteria in the available fields. Note the radio buttons **Current Employees**, **Previous Employees** and **All** to differentiate between terminated and active employees.

Click **Search** to display matching employee records.



Appoint New Employee

Every employee needs to be set up in terms of his position, personal information, reporting lines etc. Clicking on the **Appoint New Employee** button will allow you to appoint a new employee and ensure that all required information is provided. The Appoint New Employee screen is divided into four main sections:

1. Appointment Detail
2. Personal Information
3. Contact Detail
4. Reporting Lines

1. APPOINTMENT DETAIL SECTION

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See section Appoint Employee in a Position on how to appoint an employee in a position.

The following is a description of all the mandatory fields in this section.

Mandatory Field Name	Description

Position	A position is to be selected or created to appoint the employee. The following prerequisites should apply: • The position must exist • The position must be linked to a node in an organisation structure • The selected organisation structure must be the active structure See section **Appoint employee in a Position** below for more detail.
Appointment Type	Select an appointment type from a pre-defined master data list.
Appointment From	Provide the date on which the employee will commence his duties. This date will be used to also create a record for the new employee in the Appointment History section.
Start Date in Group	The Start Date in Group will be the date the employee started working at the company

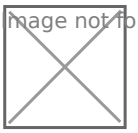
2. PERSONAL INFORMATION SECTION

Find a description of all the mandatory fields below:

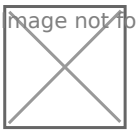
Mandatory Field Name	Description
Employee Number	If available, provide the employee's proper employee number. In cases where the employee number is not yet available, use the employee's National ID number until such time that en employee number becomes available. While typing any number in this field the system will validate the new number against all numbers already in the database, thereby preventing duplicates. The employee number used here is the number that will be used to create a USERNAME for the employee. This username will be used by an employee/user to log in to the system. The functionality to automatically generate employee numbers is available and can be activated if needed. If the automatically generate employee numbers setting is active, an override setting is available to allow the System Administrator to override individual employee numbers if needed.
Surname	The surname for the employee you want to appoint
Name	The name for the employee you want to appoint

Mandatory Field Name	Description
ID Number/ Passport Number	The ID number or Passport number should be entered. An optional setting is available to validate if the ID number is a valid South African ID.
Subsidiary	Sometimes a company may want to maintain their own employees in the database as well as records from e.g. contractors that are not employees. In these cases other subsidiaries can be created and these non-employees linked to such a subsidiary. They will then reside in the system but will not appear on any reports etc. Therefore there should be a subsidiary for company-own employees and if needed other subsidiaries for special-case “employees”.

3. CONTACT DETAIL SECTION



4. REPORTING LINES SECTION



Find a description of all the mandatory fields below.

Mandatory Field Name	Description
Reporting Lines	The Line Manager is the only mandatory field in the reporting line structure and is used to identify who an employee’s direct line manager is. The Line Manager has to be an existing active employee. If required the reporting structure can be fine tuned to indicate a separate leave manager, training manager etc. These people will then be required to do specific approvals e.g. for leave applications.

Continue to populate the record with appropriate information. The fields described in the table below are of particular importance and are therefore mandatory.

Click on the **Save and go to Employee Profile** to save the new employee record.

Appoint New Employee (Quick)

A quick way to appoint an employee with only the minimum information available.

The mandatory fields are Employee Number, Surname, Name, Position and Location in Organisation.

An employee record is saved, an appointment record and a user record will be created.

The following options are available for managing a user's password for the first login:

- A welcome notification can be sent to the employee being appointed, allowing him to reset his own password.
- The Administrator appointing the employee, can set the password for the employee.

Click on **Save and go to Employee Profile** or **Save and Appoint Another** to save the employee record.

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Appoint employee in a Position

The following apply to the appointment of an employee in a position:

- An employee can only be appointed in a vacant position that has been added to the active Organisation Structure.
- The chosen position will be the employee's primary position, if the employee is to be appointed in multiple positions.

When clicking on the hand picker below, the **Select Position Wizard** is displayed.

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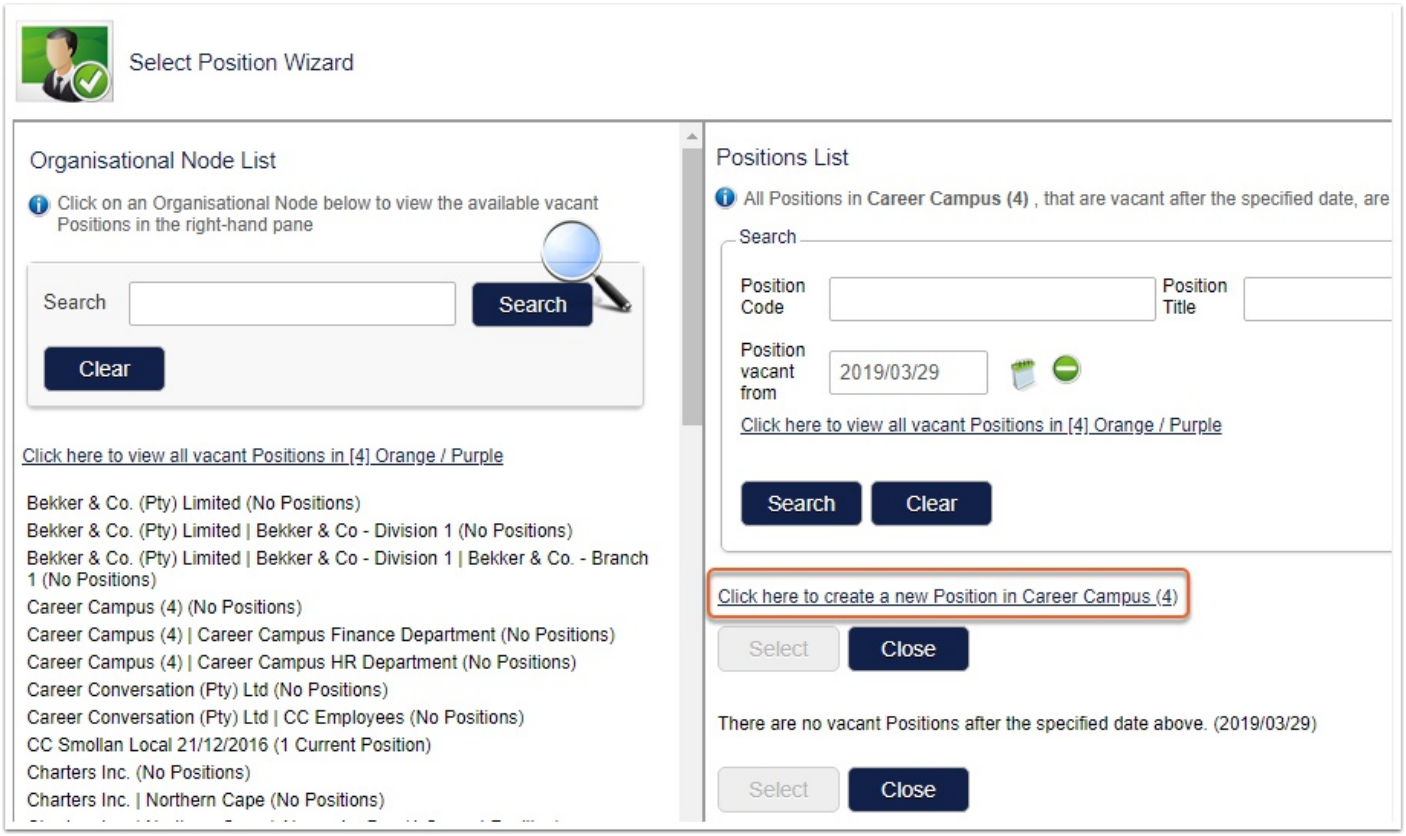

The **Select Position Wizard** screen is divided into two panels:

- The **Organisational Node List** (on the left)
- The vacant **Positions List** (on the right)

Follow the steps below to complete the position appointment:

1. Select the Organisation node where you want the employee to be appointed on the left.
2. Select a vacant position from the list on the right if it exists.
3. If the applicable vacant position does not exist, you can create a vacant position by clicking on the **Click here to create a new Position in Company** link. The option to add a new position will now be available as shown below.

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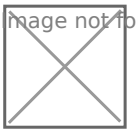
If the new position is not already linked to a Job Profile, the following screen will be displayed requesting you to create a Job Profile.

Complete the Job Profile details for the new position.

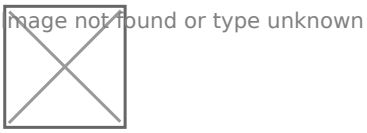
When clicking on the **Save**:

- A new profile and position in Job Profiler will be created and link it to the relevant Organisation Node in the Organisation Structure.
- You will be redirected to the **Appoint New Employee** page. The position field will be populated with the newly created position.

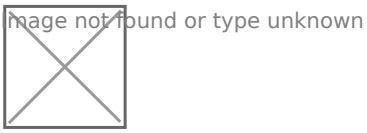


Create a User Account for the Employee

After saving the new employee record, a function is made available next to the employee number field. This account will enable the employee to log into Signify HR system.



- To create the user account, click **Create as System User.**
- Confirm that you do want to create the user.
- The page then creates the user and returns with the following message.



- The employee number provided when loading the employee becomes the employee’s username and a random password is assigned. This password can and should be changed by the user when he logs in.

Appoint Employee being Transferred

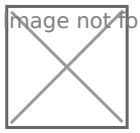
This section assists the System Administrator in appointing employees being transferred from another company/schema.

Open the Manage Employees Module

Navigation from the Home page:

- ***System Administration*** **|** ***Modules*** **|** ***Manage Employees*** to open the Employee List screen.

Employee List Screen



Appoint an Employee being Transferred

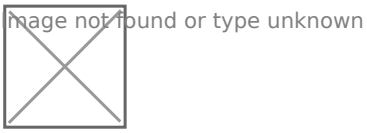
A Signify HR database can be shared amongst a number of different companies within the same group. These companies can be hosted on different Schemas.

When an existing employee is transferred from one schema to another, the person is placed onto a holding list. When **Appoint Employee Being Transferred** is clicked the list is displayed and the employee can be selected into the correct position in his new schema.

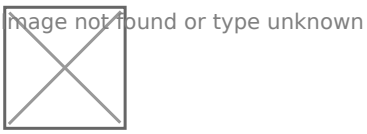
The events that took place to get an employee onto the appointment holding list are the following:

- On the ***Appointment History*** page, the employee was transferred to another company (See the Appointment History section for more details)
- The employee was then placed onto the appointment holding list which is either visible to all companies (if *I am not sure* was selected when indicating the company to which the employee was to be transferred) or to a selected company.

Note that employees cannot be transferred until they have reached the date at which they are officially available for a new position. If an employee is available for transferal the following screen is displayed:



- Identify and tick the applicable employee.
- Click **Appoint Selected Employee** to open the regular ***Transfer Employee*** screen.
- Complete all required fields in order to complete the person's appointment in the destination company.



- Click S**ave and Complete Transfer** to appoint the transferred employee.
- The **Personal Information** screen will open, showing the appointed employee.

Actions available for an Existing Employee

A couple of primary functions are available for existing employees and will be discussed in detail in this section.

- View/Edit (an employee record)
- Terminate Employee
- View Employee Profile
- View Learner Records
- View Licenses

Open the Manage Employees Module

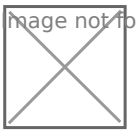
Navigation from the Home page:

- ***System Administration*** **|** ***Modules*** **|** ***Manage Employees*** to open the Employee List screen.

When the screen is opened, the page will be empty i.e. no employee records will be displayed. The search criteria will be linked to your active subgroup. You can provide additional search criteria in the available fields. Note the radio buttons **Current Employees**, **Previous Employees** and **All** to differentiate between terminated and active employees.

Click **Search** to display matching employee records.

Click on the **Action** link on the employee's record to show the dropdown item list.



View/Edit

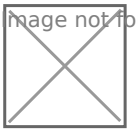
Click on the ***Action*** | ***View/Edit*** link OR click on the employee record to access the employee's record. Open the section Employee Details to see all the information available for an employee.

Terminate Employee

Terminating an employee means making the employee’s records inactive or not visible. No record is physically deleted from the system.

To terminate an employee, follow these steps:

- Locate the employee whose employment is to be terminated from the Employee List screen.
- Click on the ***Action*** | ***Terminate Employee*** link.
- The **Terminate Employee** screen is opened as shown below.



- All the positions that will be ended because of the employment termination are listed at the top of the screen.
- Complete the required fields and click **Terminate Employee** to complete the transaction.
- See article **Appointment History** for another way to terminate an employee.

View Employee Profile

- An Employee Portfolio Report with a summary of employee information will be displayed.

View Learner Records

A list of learner records is displayed for the selected employee. See the section **Learner Records** for more detail.

View Licenses

A list of Licence records is displayed for the selected employee. See the section **Licenses** for more detail.

Employee Information

This section gives an overview of the kinds of detail that can be captured against an employee's record. We will briefly discuss the additional employee information in the following sections but note that your company may or may not necessarily have each and every section. Whether a section is visible depends on a company's requirements and the Employee Information Management version installed.

Navigation from the Home page:

- ***System Administration*** **|** ***Modules*** **|** ***Manage Employees*** to open the Employee List screen.
- When the screen is opened, the page will be empty i.e. no employee records will be displayed.
- Click **Search** to display matching employee records.
- Click on the ***Action*** **|** ***View/Edit*** link OR click on the employee record to access the employee's record.

Once a record is selected, a list of additional employee information is shown on the left side menu bar as shown below.

The sections below will be described in separate articles.

- **EMPLOYEE PROFILE**

In this section you can add personal information, address, contact detail, documents, assets and many more, to an employee's record. See article **Employee Profile** for a more detailed discussion.

- **ORGANISATIONAL ASSIGNMENT**

In this section the focus is on an employee's work history and reporting structures in the company. To view more detail see article **Organisational Assignment.**

- **EMPLOYEE DEVELOPMENT**

In this section the focus is on an employee's development in terms of training, training records, development plans and professional profile. See article **Employee Development** for a more detailed discussion.

- **EMPLOYEE RELATIONS**

In this section the focus is on an employee's work relations. This include Complaints, Disciplinary actions, Disputes etc. To view more detail see article **Employee Relations.**

- **COMPLIANCE**

Organisations that employ FAIS representatives are required to maintain a FAIS representative register and to send changes on the status of representatives to the Financial Services Board (FSB) on a regular basis. The Signify HR FAIS Management module will assist you in the maintenance of the FAIS register, as well as determining if certain fit and proper requirements are met. This module is only available on the Enterprise version.

- **ADMINISTRATION**

General configuration settings for the Employee Management module can be found in this section. To view more detail see article **Employee Administration.**

- **MASTER DATA**

All the Employee Management master data tables can be populated in this section. To view more detail see article **Employee Master Data.**

Employee Profile

In this section you can add personal information, address, contact detail, documents, assets and many more, to an employee’s record.

Two versions of the Employee Information Management system are available. See indicators in the sections below.

- **Foundation version**. Basic Employee Information Management is required as the foundation for any of the additional modules in the system.
- **Enterprise version**. This module includes all the advanced modules that are not explicitly listed below as a loose standing module - such as FAIS, Leave etc.

Navigation from the Home page:

- ***System Administration*** **|** ***Modules*** **|** ***Manage Employees*** to open the Employee List screen.
- When the screen is opened, the page will be empty i.e. no employee records will be displayed.
- Click **Search** to display matching employee records.
- Click on the ***Action*** **|** ***View/Edit*** link OR click on the employee record to access the employee's record.

Once a record is selected, a list of Employee Profile information is shown on the left side menu bar as shown below.

Note: Whether the Employee Profile items are visible depends on a company’s requirements and the Employee Information Management version installed.

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Personal Information

An employee's basic personal and biographical information.

The HR Administrator can upload a photo of the employee by clicking on the **Edit Photo** link.

The Smart Navigation search functionality is available on the Employee Information screens as shown below. You can search on an Employee Number, Surname, Name or ID Number or part

thereof.

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The personal information group contains a large number of fields of which only a few are mandatory.

- **Personal Detail (Foundation and Enterprise)**
  - Employee Number
  - Surname
  - Maiden Name
  - Trading Name (Tick box)
  - Name
  - Middle Name
  - Other Names
  - Initials
  - Title (Drop down list)
  - Known As
  - Home Language (Tick box)
  - Income Tax Reference Number
  - Image URL

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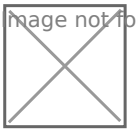
Mandatory Field Name	Description
Employee Number	If available, provide the employee's proper employee number. In cases where the employee number is not yet available, use the employee's National ID number until such time that en employee number becomes available. While typing any number in this field the system will validate the new number against all numbers already in the database, thereby preventing duplicates. The employee number used here is the number that will be used to create a USERNAME for the employee. This username will be used by an employee/user to log in to the system. Also refer to the *Create User Account* field for more information. The functionality to automatically generate employee numbers is available and can be activated if needed. If the override employee number functionality is active, an employee number can be assigned by the System Administrator himself.
Surname	The surname for the employee
Name	The name for the employee

- **Biographical Information (Foundation and Enterprise)**
  - Global Number
  - Gender (Drop down list)
  - Race (Drop down list)
  - Ethnic Group (Drop down list)
  - Citizenship (Drop down list)
  - Nationality (Drop down list)
  - Birthday
  - Age (Calculated)
  - Option for Either ID number or Passport
  - Social Security Number
  - Marital status (Drop down list)
  - Marital date (Calendar provided)
  - Disabled (Tick box)
  - Disability (Drop down list)
  - Subsidiary (Drop down list)



Mandatory Field Name	Description
ID Number/ Passport Number	The ID number or Passport number should be entered. An optional setting is available to validate if the ID number is a valid South African ID.
Subsidiary	Sometimes a company may want to maintain their own employees in the database as well as records from e.g. contractors that are not employees. In these cases other subsidiaries can be created and these non-employees linked to such a subsidiary. They will then reside in the system but will not appear on any reports etc. Therefore there should be a subsidiary for company-own employees and if needed other subsidiaries for special-case “employees”.

Additional Information

Additional Information is a section that enables you to add up to 21 customisable fields. These fields have a drop down list of values and should be populated in the **Manage Employees | Master Data | Configure Additional Information** section.

This section needs to be configured per client (examples below).

- Division Name

- FSC Category
- Hay Category
- Hay code
- Hay Job Level
- Hay Job Title
- Hay Level

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Address

The address information is divided into 4 sections as shown below: (Foundation and Enterprise)

- **Home Physical Address**
  - Unit Number
  - Street Number
  - Suburb/District
  - City/Town/Village
  - Country (Drop down list)
  - Postal Code

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- **Home Postal address** (Option: can be populated automatically if Home Postal address is same as Home Physical address)
  - Address
  - City/Town/Village
  - Country (Drop down list)
  - Postal Code

Image not found or type unknown

- **Business address**
  - Region (Drop down list)
  - Floor Number (Drop down list)
  - Address
  - City/Town/Village
  - Country (Drop down list)

- Postal Code
- The business address can be populated automatically from the organisation structure
- Some of this information can be updated by an employee from the Employee Self Service module

- Location
  - The Location field (Drop down list) should be populated in the **Manage Employees | Master Data | Location** section.

Contact Detail

Available in Foundation and Enterprise version

- Lists of contact details with local examples provided. The following fields are available:
  - Home Telephone Number
  - Work Telephone Number
  - Mobile Phone Number
  - Email Address
  - Fax Number
  - Skype Name
  - Some of this information can be updated by an employee from the Employee Self Service module

Documents

Available in Foundation and Enterprise version

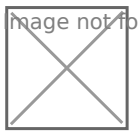
- Can attach documents such as an ID book, CV etc
  - Document Name

- Category
- Edit Document
- Delete Document
- View Details
- Download Document

Dietary Requirements

Available in Foundation and Enterprise version

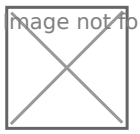
- Specify an employee's dietary preferences. Will be used in other modules.



Family History

Available in Foundation and Enterprise version

- A log of important family-related historical events for an employee.



Vehicle

Available in Enterprise version

A register of vehicles owned or driven by an employee. This information is important if the employee is to bring the vehicles onto the office premises.

- Make
- Model

- Engine Capacity
- Registration Number
- Benefit type (Drop down list)
- Repayment period (Drop down list)
- Acquired date (Calendar provided)
- Purchased date (Calendar provided)
- Mileage
- Manufacture Year
- New Vehicle (Tick box)
- Sold (Tick box)
- Financed (Tick box)

Next of Kin

Available in Enterprise version

A list of near family members that can be contacted during emergencies.

- Existing employee (Tick box)
- Relationship (Drop down list)
- Name
- Surname
- Other Names
- Gender (Drop down list)
- Title (Drop down list)
- Nationality (Drop down list)
- ID
- Contact Type(Drop down list)
- Date of Birth (Calendar provided)
- Passport Number
- Employee Number
- Next of Kin
- Primary Contact

The contact details, address and documents can also be captured for next of kin.

- Some of this information can be updated by an employee from the Employee Self Service module
- An Emergency Contact Detail report is available for the above.

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Hobbies and Interests

An employee`s hobbies and interests can be entered here.

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Criminal Record

Available in Enterprise version

A register of an employee`s criminal offences and related documentation.

- Nature of Offence (Drop down list)
- Sentence imposed/outcome
- Date Sentenced (Calendar provided)
- Sentence Expiry Date (Calendar Provided)
- Police station where case is registered
- Court Name
- Case Number

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Licenses

Available in Enterprise version

A list of licenses required by the employee’s position (linked in from his position in Job Profiler) or additionally acquired by the employee. The following categories are available:

- Public Licenses
- Ad Hoc Licenses
- Licenses required by the employee's current job/position
- Licenses required by the employee's previous job/position

Refer to the Licence Manual to view more information.

Permit

Available in Enterprise version

A register of permits registered in an employee's name. Examples are special on-site driving permits, gun permits etc.

Medical history

Available in Enterprise version

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

- General physical
- Systems
- Existing conditions
- Occupational diseases
- Referrals
- Documents

Assets

Available in Enterprise version

A register of company assets used on a permanent or temporary basis by an employee. Multiple assets such as Notebooks, access cards, furniture, equipment can be linked to employee records as required.

- Type (Drop down list)
- Item (Drop down list)
- Quantity
- Serial Number
- Description
- Date issued (Calendar provided)
- Expected return date (Calendar provided)
- Actual return date (Calendar provided)
- On an employee's resignation HR is notified about company assets due for return

Leave

Available in Enterprise version and Leave Module

See Leave Module Manual for more detail

Employee Funding

Available in Enterprise version

Employee funding is used to keep track of items such as expenditures that require work-back periods.

- Type (Drop down list)
- Amount
- Description
- Date Allocated (Calendar provided)
- Payback Period Start (Calendar provided)
- Payback Period End (Calendar provided)
- Settled (Tick box)
- Settlement Date (Calendar provided)
- Supporting documentation can also be added.

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Custom Field

Available in Foundation and Enterprise version

Custom field is a section that enables you to add your own fields (examples below). These fields can be configured in Manage Employees | Master Data | Custom Field Configuration section.

This section needs to be configured per client (example below).

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Notification Detail

Available in Foundation and Enterprise version

In this section the HR Administrator are able to add notifications/reminders for an employee (examples below).

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Talent Profiles

Available in Enterprise version

Refer to the Talent Management manual for more information.

Organisational Assignment

In this section the focus is on an employee’s work history and reporting structures in the company.

Navigation from the Home Page:

- System **Administration | Modules | Manage Employees** to open the Employee List screen.
- When the screen is opened, the page will be empty i.e. no employee records will be displayed.
- Click Search to display matching employee records.
- Click on the **Action | View/Edit** link OR click on the employee record to access the employee's record.
- Once a record is selected, find the **Organisational Assignment** link on the left side menu bar as shown below.

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Appointment History

This section the history of the employee's employment at this company. Here you also have various action items. You can Terminate, Transfer, Appoint the employee in another position, or simply make a correction.

This section aims to keep history of all the appointments an employee held in different capacities at the current company.

The records shown here are created or changed for the following reasons:

- A new employee is appointed.
- An existing employee is appointed into a position over and above the one already held by him/her.
- One of an employee’s positions is transferred/changed to another. (Not affecting the others).
- An employee is transferred to another position and ALL his current positions have to be ended.
- An employee is transferred to another company (in the same database). This would also end ALL his current positions.
- When an employee’s employment is terminated.

- Making corrections on any of the above.

The screen where all of the above can be accomplished is shown below.

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Appoint Employee in another Position

The following apply to the appointment of an employee in another position:

- An employee can only be appointed in a vacant position that has been added to the active Organisation Structure.
- The option to set the employee's primary position is available, if the employee is to be appointed in multiple positions.

Follow the steps in the article Appoint employee in a Position to complete the appointment process.

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One of the Employee's Positions is Transferred

To end a specific position and transfer the employee to another position, click on the **Transfer to another position** link in the Action drop down list as shown below.

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You will have to select a reason for the transfer, indicate if this position is the new primary position and would you like to keep the position vacant after the transfer.

NOTE: This transfer process will end ONLY the selected active position.

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Transferring an Employee (Ending ALL Active Positions)

The Signify LMS system caters for multiple companies/schemas (belonging to the same group of companies). There are two transfer options available as shown on the page below.

- Transferring the employee to another position in the same company/schema
- Transferring the employee to another position in another company/schema

To do a full transfer, ending all active positions, use the **Transfer Employee** button on the Appointment History screen as shown below.

Image not found or type unknown

Transferring the Employee to another Position in the same Company

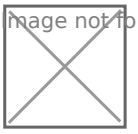
The **Transfer Employee /Appoint in new Position** screen is divided into two sections to make provision for the two options mentioned previously.

- Tick the radio button indicating that the employee *will stay within* the same company.
- A list of positions in the current company is then made available and the position to which the employee is being transferred can be selected. Use to search the list of available positions.
- Complete the remaining fields namely *Appointment Type*, *Appointment Dates* etc.

Click on **Transfer Employee** to transfer the employee upon which a second appointment history record will be created.

Note:

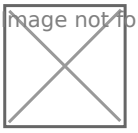
- All positions held by the employee are ended and the *TO* dates are filled in.
- The new active position is added.



Transferring the Employee to another Position in another Company

The **Transfer Employee /Appoint in new Position** screen is divided into two sections to make provision for the two options mentioned previously.

- Tick the radio button indicating that the employee *will be transferred* to another schema/company.
- From the drop-down either select:
  - One of the available companies to which the employee is to be transferred, or
  - Select *I am not sure* to place the employee onto an appointment holding list for later appointment. with this option the following message is displayed: "Please note that the employee will be available to ALL Companies"
- Complete the remaining fields namely the *Employee's Last Day of Service in the Current Company* and the date on which the *employee will be available in the new company*.

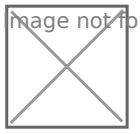


Click on **Transfer Employee** to transfer the employee upon which the following message will be displayed: "Please note that the employee will remain within Signify Software until selected/ appointed by the new Company. Also note: All roles (if any) will be removed from this employee once the employee is transferred to another site". On acknowledgment of the message, the following will be applied:

- The employee REMAINS in his current position.
- The employee is placed on a list of *employees to be appointed* which all companies in the database have access to. The applicable company can then pick the employee up and appoint him in the correct position and only then will the employee be moved out of his current position in the current company to his new position in the other company. Refer to the

Appoint Employee being Transferred section to learn how to appoint a transferred employee.

- The following message is displayed on the main Appointment History screen until the employee is physically transferred to the new company.
- The transfer can still be cancelled at this stage by clicking the **Cancel Transfer** button.



Moving an Employee with his Current Position to a new place in the Organisation Structure

This action cannot be executed on the Appointment History page but how to accomplish it is mentioned here since it is sometimes a requirement to, instead of transferring an employee:

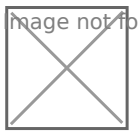
- Move an entire position with its incumbent to a new node on the organisation.
- While moving the position and person not cause a transfer record to be inserted into the person’s appointment history.

The steps to accomplish this are the following:

Open the organisation structure and locate the node where the position(s) currently reside.

Click on Link Positions to open the following screen.

Tick the positions to be moved and click on the **Move Selected Positions** button.



Confirm the moving of positions.

Select the destination node for the position(s).

Click **Move Position(s)** to complete the process.

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Terminating an Appointment

Terminating an appointment is a simple procedure but there is again two ways of getting to the same result.

- Terminate the employee (including all active positions held by the person)
- Terminate a specific position

Terminating the Employee

Navigation from the Home page:

- ***System Administration*** **|** ***Modules*** **|** ***Manage Employees*** to open the Employee List screen.

Select **Terminate Employee** in the **Action** hyperlink in the employee's record as shown below.

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A list of all the positions that will be ended because of the employment termination are listed at the top of the screen.

Complete the required fields and click **Terminate Employee** to complete the transaction.

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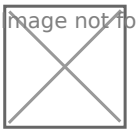
Terminate the Position/Appointment

- Navigate to **System Administration** | **Modules** | **Manage Employees** | **Organisational Assignment** | **Appointment History**.
- Locate the appointment record that is to be terminated or ended.
- Select **Terminate Appointment** in the **Action** hyperlink in the employee's appointment record as shown below.



The position that will be ended is shown at the top of the page.

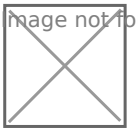
Provide the details and click **Terminate Appointment** to complete the transaction.

Make Corrections to an Appointment

- Navigate to **System Administration** | **Modules** | **Manage Employees** | **Organisational Assignment** | **Appointment History**.
- Locate the appointment record that is to be corrected.
- Select **Make Correction** in the **Action** hyperlink in the employee's appointment record as shown below.

Make the necessary correction or remove the appointment if required.

Click **Save** when done.



Previous Employment

Under previous employment a history of all previous employers and jobs are kept. What might not be obvious is that a person could have worked as an employee for another contracting company but was physically working on the site of the current employer.

Navigate to **System Administration | Modules | Manage Employees | Organisational Assignment | Previous Employment** to get access to this functionality.

Reporting Lines

The reporting lines section is an important part of many modules where workflows are expected to route requests for approvals and decisions to the correct people.

In this section a number of module-specific *next higher managers* can be set up for an employee. E.g. if an employee requests to attend a training course, his request will be forwarded to the person who has been set up as his Training Manager. If he wants to apply for leave, his application is forwarded to the person acting as his Leave Manager etc. In this way an employee could have one direct line manager but multiple people approving different aspects of his life at a company.

In most cases the same person (i.e. an employee’s direct line manager) would be responsible for all the reporting lines but special cases can be treated via this functionality as well. Reporting line headings are configurable to suit a company’s requirements.

Navigate to **System Administration | Modules | Manage Employees | Organisational Assignment | Reporting Lines** to manage an employee's reporting lines.

Note: The Line Manager, usually an employee's direct manager, is the only mandatory field in the reporting line structure.

Populate the reporting line fields by selecting the managers using the hand picker tool and click **Save Reporting Structure.**

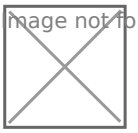
Click **Refresh Reporting Structure** to ensure all reporting line values are updated and refreshed.

Employee Development

In this section, the focus is on an employee’s development in terms of training, training records, performance management history, development plans and professional profile.

Navigation from the Home Page:

- System **Administration | Modules | Manage Employees** to open the Employee List screen.
- When the screen is opened, the page will be empty i.e. no employee records will be displayed.
- Click Search to display matching employee records.
- Click on the **Action | View/Edit** link OR click on the employee record to access the employee's record.
- Once a record is selected, find the **Employee Development** link on the left side menu bar as shown below.



Career Conversation

The Career Conversation Module is a “lighter” version of Performance Management that focuses on a conversation between the employee and his manager. The employee’s role profile is discussed and the main focus is on the key performance areas, key performance indicators and competencies. These KPA’s, KPI’s and Competencies are marked as Start, Stop and Continue and all items selected with an output of Start and Stop will form part of the employee’s Action Plan.

Refer to the Career Conversation Training Manual for more information.

Talent Assessment

The information on this screen is displayed as part of an employee’s Talent Management process. Both employee and manager can see the detail but only the employee would have access to any documentation uploaded here. The information contained here is of a personal and confidential nature. Only trained and accredited personnel may have access to it. Caution should be exercised

in using the information. For further information on their Talent Assessment Information employees should contact a Psychologist/ Psychometrist in HR.

In order to better understand your workforce, to know where to focus your training initiatives or if the correct talent distribution of personnel is available for a particular project it is necessary to have some grasp of the talents and potential in your organisation. This section enables you to graphically plot an employee's talent rating using a talent matrix.

Refer to the Talent Management Training Manual for more information.

Assessment List

Assessment List provides a list of Online Assessments attempted by the employee.

Learner Detail

This page is configurable to suit a company’s purposes.

- Track the status of employees against a list of values:
  - 9 Check boxes
  - 8 Date boxes
  - 4 Text boxes
  - 2 Memo boxes
- The labels of these items can be changed using the data dictionary - per system, not per schema.

Learner Records

Provides a view of employees training and qualification history.

- Capture training, unit standards, skills programmes, learnerships, qualifications on individual learner records.
- Allow for batch capturing of training records to multiple employees.
- Print Training and qualification records for individual employees.
- Search by Title/Provider within a person's learner record
- Option to see summary or full view or learner record
- Categories covered are: Training, Qualifications, Unit standards

Refer to the Learner Records section for more detail.

Performance Management

Performance Management (PM) is the process that identifies, evaluates, develops and monitors employee performance in order to ensure that

- the company/department's mission and objectives are achieved;
- the company/department's values are practiced;
- the employees benefit by knowing what their expectations are and get recognition for their efforts;
- feedback on employee performance is provided, training and development approach is improved and career planning is furthered.

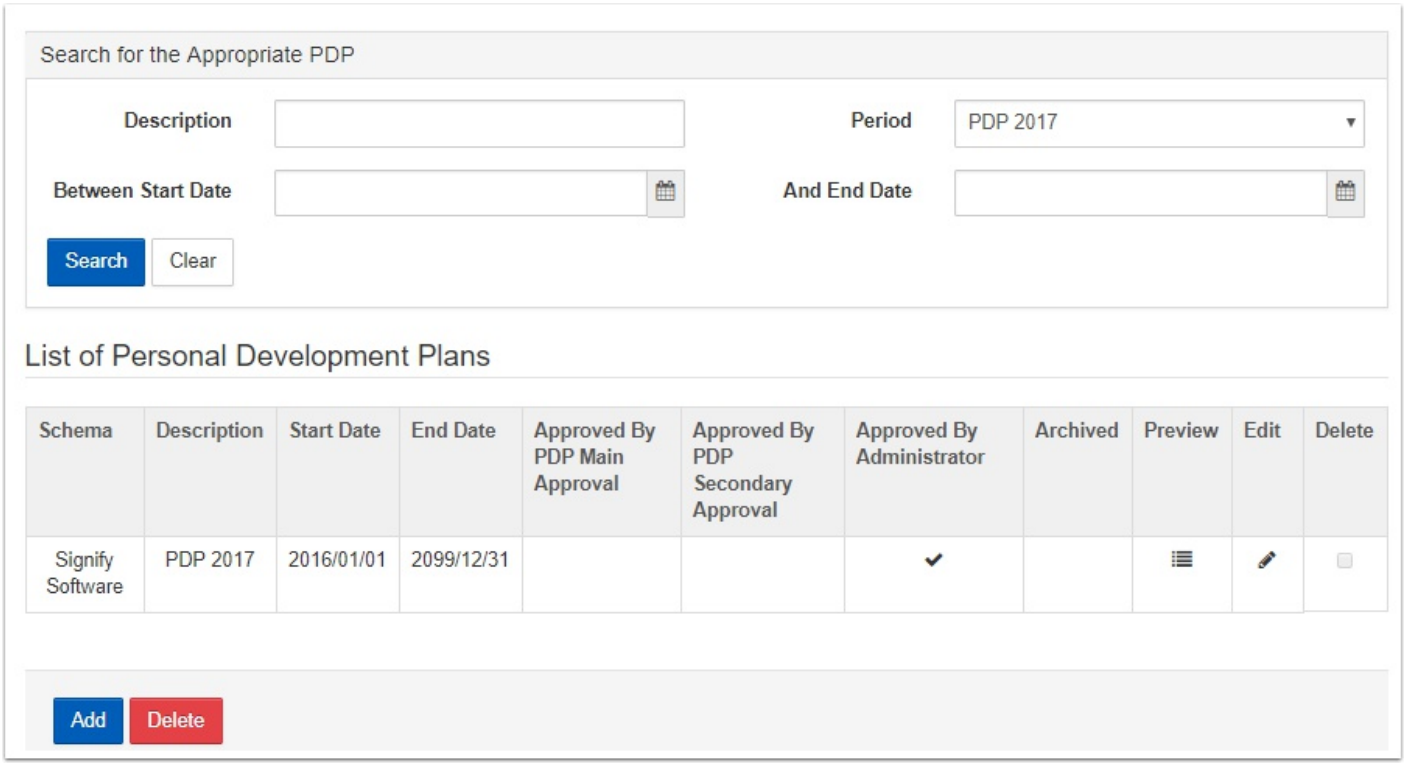
Refer to the Performance Management Training Manual for more information.

PDP (Personal Development Plan)

Personal Development Planning is the process of creating an action plan based on goal-setting and planning for personal development within the context of a career, education or for self-improvement.

The PDP, also called an IDP (Individual Development Plan) or a PEP (Personal Enterprise Plan), usually includes a statement of one's aspirations, strengths or competencies, education and training, and stages or steps to indicate how the plan is to be realized. Personal development plans may also include a statement of one's career and lifestyle priorities, career positioning, analysis of opportunities and risks, and alternative plans.

Refer to the PDP Training Manual for more information.



Professional Membership

Provides an option to add professional associations for an employee using the following fields:

- Membership Type
- Institute
- Membership Number
- Registration Date
- Expiry Date

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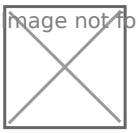
Training Roles

Training roles are used as an indicator or definition of what training an employee is required to undergo regarding a specific subject matter area.

This implies that every training role can be linked to different training courses and an employee's progress on the required courses can then be monitored. This requires configuration from Signify.

Strengths and Weaknesses

The purpose with this section is to allow drafting a list of the strengths and weaknesses an employee exhibits. How it is actually used is up to the client. The section consists of one page with two tabs on which the respective strengths and weaknesses can be recorded.



Notes

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

Employee Relations

The Signify Software Employee Relations (ER) Module is designed to assist with the recording and storing of information that relates to inadequate performance and misconduct of employees whilst they are at work. It should be noted that this module should not be used as a guide regarding ER matters as the primary function is to record events and outcomes that have already happened.

This manual will guide system users and administrators through the different options and ways to record events related to employee performance. The system compartmentalises IR into 5 sections:

1. Disciplinary Standard
2. Disciplinary Advanced
3. Dispute
4. Grievance
5. The Disciplinary Detail Report
6. Master Data

Navigation from the Home Page:

- System **Administration | Modules | Manage Employees** to open the Employee List screen.
- When the screen is opened, the page will be empty i.e. no employee records will be displayed.
- Click Search to display matching employee records.
- Click on the **Action | View/Edit** link OR click on the employee record to access the employee's record.
- Once a record is selected, find the **Employee Relations** link on the left side menu bar as shown below.

Refer to the Employee Relations Training Manual for more information.

Compliance

Available in Enterprise Edition

In this section the focus is on an employee’s compliance in the company.

Navigation from the Home Page:

- System **Administration | Modules | Manage Employees** to open the Employee List screen.
- When the screen is opened, the page will be empty i.e. no employee records will be displayed.
- Click Search to display matching employee records.
- Click on the **Action | View/Edit** link OR click on the employee record to access the employee's record.
- Once a record is selected, find the **Compliance** link on the left side menu bar as shown below.

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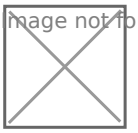


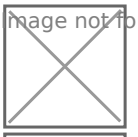
Occupational Health and Safety Representation

OHS - Occupation Health and Safety provides Information on the company's elected Occupational Health and safety personnel.

The available fields are:

- HAS Representative
  - Currently active
  - Type (Drop down list)
  - Certificate Number
  - Dates valid From (Calendar provided)
  - Assigned To
- Fire Fighter
  - Currently active
  - Type (Drop down list)

    - Certificate number
    - Dates valid from (Calendar provided)
    - Assigned to
- First Aider
    - Currently active
    - Type (Drop down list)
    - Certificate Number
    - Dates valid from (Calendar provided)
    - Assigned to
    - First Aider Level (Drop down list)



Manage Learner Records

This section is quite comprehensive and forms an integral part of all *learning*-related modules in the Signify HR system. In short it boils down to a history of qualifications, courses or any other training an employee went through prior to or while in a company's employment

It is important to note that this entire module is highly configurable. Almost all fields as well as whether they should be mandatory or not, can be set up according to a client's specifications.

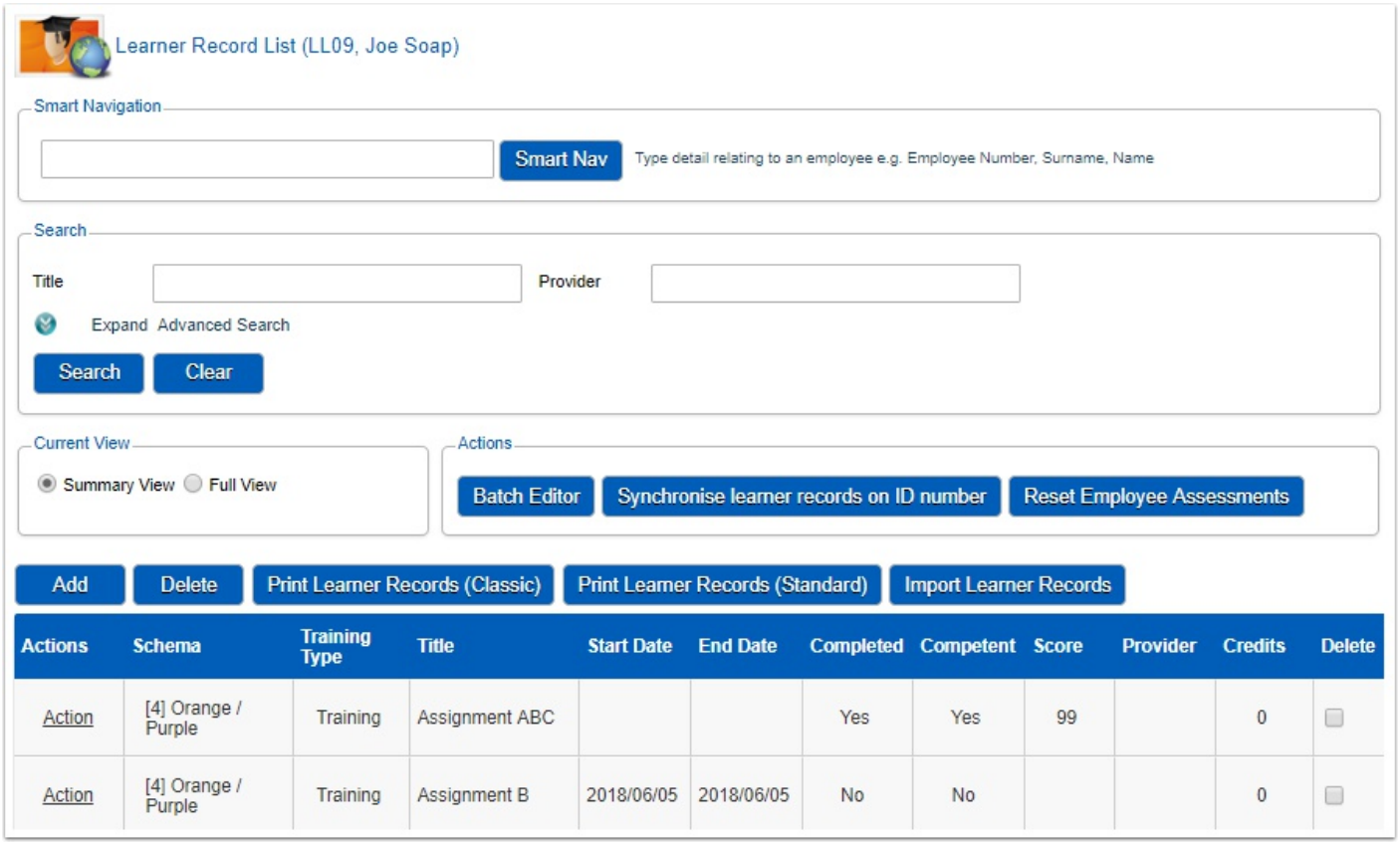
The following are sources for Learner records:

- Events that are attended by an employee.
- Learning pathways (in their totality)
- Individual steps on pathways
- Programmes (comprising a number of courses)
- Assessments
- Manual inputs by administrative personnel
- Manual inputs from the Employee Self Service portal
- Bar-coded imports

How to access the Learner Records

Navigation from the Home page:

- ***System Administration*** **|** ***Modules*** **|** ***Manage Employees*** **|** ***Employee Development*** **|** ***Learner Records*** to open the Learner Record List screen.



The following functionality is available on the Learner Record List Screen:

- **Search**

Basic criteria fields are provided but they can be expanded to allow more options.

- **Summary View & Full View**
  - Full View displays every learner record in its own row. (Showing multiple records should they have come from a skills programme)
  - Summary View is used to group all learner records coming from a skills programme under the title of the skills programme. The option is there to expand the programme to reveal the individual learner records.

- **Batch Editor**

Specify criteria and then easily edit all matching records without having to re-search every time. Some of the functions are:

- Works across employee learning records e.g. see all employees who have done the same course.

- Edit all matching records by hand or specify a change once and apply it to all selected records.

- **Reset Employee Assessments**

If an employee completed an assessment for which a learner record had been submitted, this functionality enables the administrator to manually reset the number of tries used, allowing the employee another try at the assessment.

- **Synchronise learner records on ID number**

In older versions of the LMS system, different employees could have the same ID Number. The **Synchronise learner records on ID number** functionality was used to copy all the learner records to all employees with the same ID Number. Later versions of the LMS does not allow for duplicate ID Numbers, therefore this functionality is now redundant.

- **Import Learner Records**

This functionality can be used to upload a comma delimited CSV file and directly import the selected file to create learner records. The file format is fixed and should be the same as the configuration.

- **Reports**

Learner Record Reports showing completion dates, statuses, scores etc. These reports can be downloaded in PDF format.

- **Add**

Add a new learner record.

- **Delete**

Delete selected learner records.

How to Log (Add) a Learner Record

When the **Add** button is clicked, on the Learner Records List screen, the Log Learner Record screen is opened and the first activity on this page is to determine the type of learner record that is to be added for an employee.

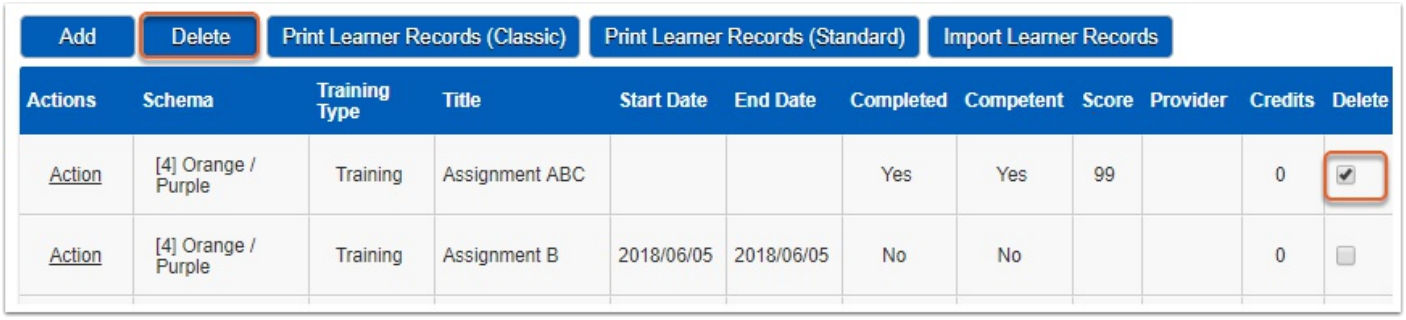
The system will display different fields depending on the type of learner record chosen.

The sections available on the Log Learner Record screen are:

- BASIC INFORMATION:
  - Quality checked: At the top of the **Qualifications** learner record is a checkbox. In cases where learner records are automatically logged from other modules, quality checking is not required. But where records are manually submitted from e.g. the Employee Self Service portal it might be prudent to occasionally quality check and verify the submitted information.
  - Only the Title, Start Date and End Date fields are mandatory when creating a new learner record.
- ASSESSMENT:
  - A learner record can be assessed by an Assessor using this functionality. The following accompanying information is also captured: assessment date, score, number of attempts.
- MODERATION:
  - Moderation results can be captured and stored by the moderator. The following accompanying information is also captured: moderation date, moderation outcome and comments
- COSTS:
  - Multiple costs can be captured per learner record e.g. course cost, travel cost, accommodation cost, printing cost etc.
- DIFFICULTIES ANTICIPATED:
  - A text field to indicate any difficulties anticipated.
- NOTES:
  - A text field allowing for notes to be added to the learner record.

How to Delete a Learner Record

Select the learner record(s) to be deleted and click on the **Delete** button.



Additional Actions on a Learner Record

In addition to the above mentioned functionality, the following actions are available with which to add additional information to an existing learner record.

Click on the **Action** link on the employee's learner record to show the dropdown item list.

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VIEW / EDIT DOCUMENTS

- Supporting documentation can be uploaded on the learner record e.g. invoices, POE documents, assessment results, qualification certificate etc.

VIEW / EDIT ASSESSMENTS

- Multiple assessment results can be captured and stored by the assessor. The following accompanying information is also captured: assessment date, competent status, number of attempts and comments.

VIEW / EDIT MODERATIONS

- Multiple moderation results can be captured by Internal and External moderators. The following accompanying information is also captured: moderation date, moderation outcome and comments.
- The Internal moderator can send an email notification to the assessor containing the outcome of the moderation process.
- An External moderator can send an email notification to the External moderator containing the outcome of the moderation process.

COPY TO OTHER EMPLOYEES

Occasionally a couple of employees attend the same course or obtain the same qualification. It would be more efficient to provide the details once and duplicate it to multiple employees. This functionality enables such a quick duplication of records.

DOWNLOAD CERTIFICATE

A training intervention can be configured to allow the printing of certificates. A certificate can be downloaded and printed here.

EMPLOYEE FUNDING

This functionality is available on Qualification type learner records. The functionality manages scholarship information on the learner record. Details pertaining to a current or completed scholarship can be captured in these forms:

- Detail:
  - Start and end dates; Mentor details; Status and Terms and Conditions.
- Periods:
  - Periods of decreased, limited or no funding can be captured as well as whether such a period led to a scholarship re-application. Subjects passed or failed during a period can also be captured.
- Contributions:
  - Any financial contribution to a scholarship from any source can be recorded.
- Expenses:
  - A list of expenses incurred against the scholarship.
- Documents:
  - Supporting documentation on a scholarship e.g. ID documents, invoices, report cards etc.
- Notes:
  - Actions assigned to people; A due date can be added.

Manage Subgroups

Subgroups are made up of employee records grouped or selected from the database because of some common characteristic e.g. the same department or job title etc.

Some of the advantages of making use of subgroups are:

- Employee records can be put into smaller groups for example only those within a specific company branch or level.
- Subgroups can be used for batch editing etc.
- A user's access can be restricted to only the employees in a subgroup.
- A subgroup can be defined to include employees from across different departments and subsidiaries.

Standard subgroups that are used more frequently are created automatically by the system.

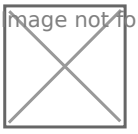
How to link subgroups to a user, will be discussed in the Manage Users section.

Administrators can create customised subgroups using the Subgroup Query Builder. It will be to your advantage if you have SQL knowledge when using this functionality.

Working with Subgroups

Navigation from the Home page:

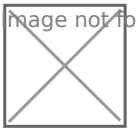
- ***System Administration*** **|** ***Subgroup*** to open the Subgroup List screen.



Creating a New Subgroup

Click on **Create** to open the Query Builder screen.

Enter a description and category for the new subgroup on the screen below.



EXAMPLE OF A SUBGROUP CONDITION:

Gender = 'Male' AND Age > '50'

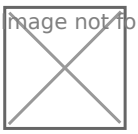
Creating a condition or criteria for a subgroup is a step-by-step process. As an example we will be building the condition shown above.

- In the **Available Fields** section, locate and click the *Gender* field
- From the **Operator** buttons choose the "="
- In the **VALUE** field, type in *MALE*
- From the **COMBINE** buttons click the **And** button
- In the **Available Fields** section, locate and click the *Age* field
- From the **Operator** buttons choose the ">"
- In the **VALUE** field, type in *50*
- Click on **Check Syntax** at the bottom of the page to validate your statement
- Click **Save**

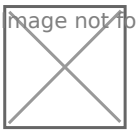
Additional functionality available on the Query Builder screen are:

- **Undo**: Undo will undo your last step when building the condition.
- **Clear All**: Use to remove the entire condition.
- **Manual**: You get full control over the SQL portion of the condition as shown below. All other controls and buttons are removed, leaving only the available fields. A warning message alerts the user to the fact that only advanced users should attempt to manually edit a condition.

How to Delete a Subgroup



- Search for and locate the applicable subgroup you want to delete.
- Select the **Delete** check box.
- Select **Delete** to display the following confirmation message.
- Select **Yes** to confirm the delete action.



Manage Users - How to Manage Users

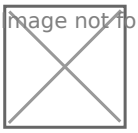
This section assists the System Administrator in managing users in the Signify HR system. The following topics will be discussed:

1. Create, edit and remove a user account
2. Send Welcome Notification to New users
3. Define a User Account's Profile
4. Assign subgroup access
5. Grant reporting rights
6. Role Assignment

How to Access Manage Users

To access the System Administration Users functionality navigation from the Home page:

- ***System Administration*** **|** ***System Administration*** **|** ***Users*****|** ***Manage Users*** to open the List of Users screen.

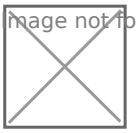


User Information

List of Users Screen

A list of existing users is displayed. The following functionality is available:

- Search criteria
- Add New user
- Delete
- Send Welcome Notification to New users

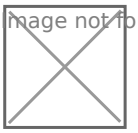


Add New User

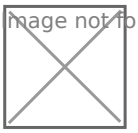
There are two ways to create a user account:

1. The quickest way to create a user account is to make use of the link that becomes active when a new employee record is saved for the first time. This method was discussed in Create a User Account for the Employee.
2. Another way to create a user account for an employee is via the System Administration menu which will be discussed next.

Click on **Add New User** below, to open the **User Information** screen.



Populate the page with the user’s information and click **Submit** to create the user account.



Editing a User Account

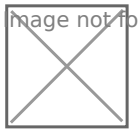
Click on **View/Edit** in the **Action** dropdown list to edit an existing user's information.

Resetting a User's Password

The following steps are needed when a user requests the resetting of his user account password:

- Locate the **Reset User Password** section on the User Information screen.
- Three options are available and they include combinations of the following.
  - Display the new password on screen e.g. if the administrator needs to send or even read the password to the user.
  - Send the user a link which they have to:
    - Click in order to reset the password themselves.
    - Change the password when logging in the first time.

In all these cases, the user will be forced to change his/her password when logging into the system again.



Opening a Locked User Account

The following steps are needed when a user requests the opening of his user account. A user account is normally locked if the password is incorrectly typed in three times.

Use the steps for resetting a user's password (discussed above) to unlock a locked user account.

Removing a User Account

The predominant reasons for removing a user account are to either prevent the user from accessing the system or because the account is no longer being used.

Two methods are available for achieving this goal:

1. Disabling a User Account
2. Deleting a User Account

How to Disable a User Account

Disabling a user account is a temporary way of rescinding system access to a user and one that should preferably be used instead of deleting the account.

- Open the List of Users screen and select the user to be disabled.
- On the **User Information** screen, tick the **Disable User** checkbox and click **Submit**.

- The account is now disabled and the user will no longer be able to login.
- The account can at any stage be enabled again by removing the tick.

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How to Delete a User Account

Deleting a user account is a permanent way of cancelling system access to a user. If the account was deleted in error, it will have to be recreated and all its authorisations manually re-entered. Rather disable the account as discussed in the previous section.

To delete a user account, follow these steps:

- Open the List of Users screen and select the user to be deleted.
- Select the delete check box and click **Delete** for the user account to be deleted.
- When you confirmed the delete action, the record will be permanently removed.
- The employee logging in with this account will no longer be able to login.
- **Note**: The employee record attached to the user account is NOT deleted only the system account by which the employee gains access to the system is removed.

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Defining a User Account's Profile

Besides the general information that makes up a user account, the following attributes can also be specified to even further define a user’s rights and access levels. For EVERY new user consider ALL the items below, even if they do not necessarily apply.

- Whether the user should be made a full system administrator or a schema administrator.
- To which subgroups the user should get access
  - The level to which the user is to have access on a subgroup

- Which roles (e.g. leave administrator) the user is expected to play
- Which reports a user should have access to
- Which HR requests are to be routed to the user if applicable
- What the user's default schema should be (if applicable)

Giving a User Full System Administration Rights

Giving full system administration rights to a user should only be given under very controlled circumstances since sensitive information could become visible. Signing a confidentiality agreement is also advised. A System Administrator will be able to do the following:

- Create, edit and delete a user
- Grant subgroup access
- Grant reporting rights
- Grant roles (Role Assignment)
- Grant HR Process access
- Activate a subgroup

A user can be given System Administrator rights or Schema Administrator rights. The main difference between the two is that the Schema Administrator can only manage users on his own Schema.

- Open the applicable user's account.
- On the *User Information* screen tick the *Administrator* checkbox.
- Click **Submit** to save the change.

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Send Welcome Notifications to New Users

Click on **Send Welcome Notification to New Users** on the List of Users screen below.

How do the welcome notifications work?

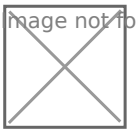
By following the **three step workflow** below an email will be sent to users created or imported after the specified date. Users affected will be

- All users that have been imported and haven't received a welcome notification
- And users that were created manually and haven't received a welcome notification

You can untick the **Ignore users created / imported before this date** checkbox if you want to send welcome notifications to all users, regardless of when they were created on the system.

Choose one of the following three options:

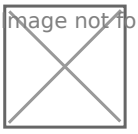
1. Send the welcome message to all users
2. Select the welcome message only to users that I have selected
3. Send the welcome message to all users, but exclude users that I have selected



Subgroup Access

In this section a user is given access to specific subgroups. By default a user has no access to all subgroups unless he is explicitly setup to have access to one or more. Refer to the Subgroups section for more information on how to manage a subgroup.

- Open the List of Users screen and select the user to assign subgroup access for.
- Select **Subgroup Access** from the side menu bar to display the list of subgroups a user currently has access to.



- The **Subgroup List screen** allows for the following functionality when managing Subgroup Access:
  - **Add Subgroup:** A new subgroup can be created

- **Refresh Subgroups:** All the applicable system tables for all the modules are refreshed.
- **Set Preferred Subgroup**: Use this setting to setup the default subgroup for a user.
- **Clear Preferred Subgroup:** Remove the preferred subgroup.
- **Delete:** Remove subgroup access.

NOTE: The Refresh Subgroup action is very important after subgroups access were amended.

How to Define Permissions on a Subgroup

Click on the **View/Edit Permissions** link in the **Action** dropdown of the selected subgroup in the Subgroup List.

There are more than one area that specific permissions can be set up for. These are:

- Employee Records (includes the Manage Employees module)
- Query Builder
- Profiles (includes the Job profiler module)
- Switch to another user's profile

Setting up Permissions for Employee Records

To set up permissions for the employee records, tick the **Access to Employee Records** checkbox. This will open the following sections where detailed access can be specified per section. Go through the sections and indicate to which the user should have view and/or edit rights. Click **Save Subgroup Rights** to save the changes.

Setting up Permissions for Query Builder

To allow full permission on the *Query Builder* module, tick the appropriate check box as shown below.

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Setting up Permissions for Profiles

To allow full permission on *Profiles*, tick the appropriate check box as shown below.

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Allow an Administrator user to Switch to Another User's Profile

- The system allows administrator users or users in suitably responsible positions to support other users by physically logging in as them. In this way the administrator user can see and do what the user is seeing and doing, thus giving practical and topical assistance.
- Be careful when assigning this right to any user since the administrator can see and do anything the user is able to see and do.
- All actions performed by the administrator are logged against the name of the administrator.

To allow full permission on *Switch to another user's Profile*, tick the appropriate check box as shown below.

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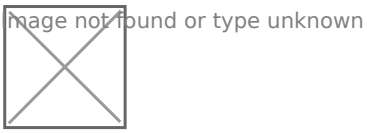
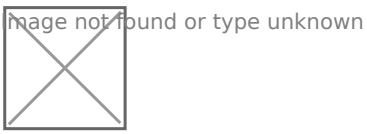
Switching to Another User's Profile

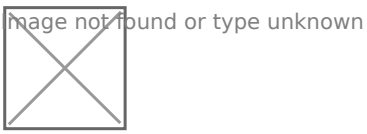
When an administrator user, who was given Switch User rights, logs into the system he will have access to the **Switch user** functionality from the system portal as shown below.



- Ensure that the appropriate subgroup is activated, search for the user to be supported and click to display all employees matching the search criteria.
- Locate the applicable user and click the "**Switch to ...**" button in the **Action** column.



Acknowledge the conditions of the switch action.



- The session is changed to that of the selected user and from now on all actions are logged against the administrator not against the user.
- To return to the administrator’s own profile, click the **Switch user** functionality from the system portal.
- Acknowledge the switch back to your own profile.

Manage Users - Subgroup Access

Subgroup Access

In this section, a user is given access to specific subgroups. By default, a user has no access to all subgroups unless he is explicitly set up to have access to one or more. Refer to the Subgroups section for more information on how to manage a subgroup.

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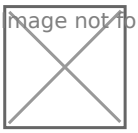

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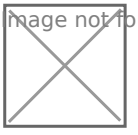

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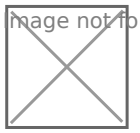
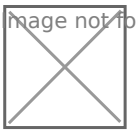


Setting up Permissions for Query Builder

To allow full permission on the *Query Builder* module, tick the appropriate check box as shown below.

Setting up Permissions for Profiles

To allow full permission on *Profiles*, tick the appropriate check box as shown below.



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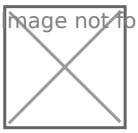

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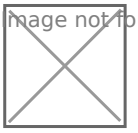

- Ensure that the appropriate subgroup is activated, search for the user to be supported and click to display all employees matching the search criteria.
- Locate the applicable user and click the "**Switch to ...**" button in the **Action** column.

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Acknowledge the conditions of the switch action.

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- The session is changed to that of the selected user and from now on all actions are logged against the administrator not against the user.
- To return to the administrator’s own profile, click the **Switch user** functionality from the system portal.
- Acknowledge the switch back to your own profile.

Manage Users - Copy User Rights

Properly defining a user’s subgroups, access rights, roles etc. is a time-consuming business. Fortunately, one user’s user profile can be copied across to other users.

Open the List of Users screen and select the user to assign subgroup access.

- Select **Copy User Rights** from the side menu bar to display the Copy User Rights screen.

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- Select the user to receive the new set of access rights.
- Click **Copy User Rights** to copy all the rights from the current user to the selected user.

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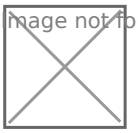
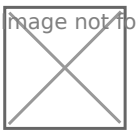
Manage Users - Reporting Rights

When required, only certain reports can be made available to a user. In order to link the relevant reports to a user’s account, follow these steps:

- Open the List of Users screen and select the user to assign reporting access for.
- Select **Reporting Rights** from the side menu bar to display the list of reports a user can have access to.



Select all the reports using the check boxes and click **Save Permissions.**

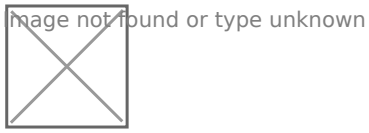


Manage Users - Role Assignment

A user can assume different roles other than just having employees report to him. E.g. in some cases, a user can be expected to approve training requests from employees not reporting to him. Or he can be expected to manage training events. In both these examples the user was assigned a specific role to execute the responsibilities and that is the objective of this section.

To assign a role to a user, follow these steps:

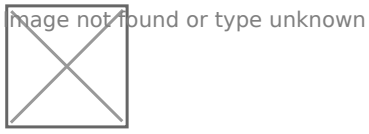
- Open the List of Users screen and select the user to assign reporting access.
- Select **Role Assignment** from the side menu bar to display the list of roles a user is currently linked to.



User Role List

A list of user roles is displayed. The following functionality is available:

- Search criteria
- Add New Role
- Delete
- Add Multiple Roles



Add a User Role

Click on Add to open the User Role Detail screen below.

To select a role, click the hand picker to open the **Available Role List** screen.

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- Select the appropriate role and click **Select** to update the **User Role Detail** screen.
- If you are happy with this role, click **Save** to display the detail for the selected role.

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- Use the screen below to more specifically stipulate what this role is allowed access to.
- From the complexity of this screen, it can be understood that between two users, linked to the same role, there can be a difference in access levels.
- When the **User Role Detail** page is saved, the user is returned to the updated **User Role List** screen.
- Continue in this fashion to assign more roles to a user.

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Delete a User Role

To delete a user role, follow these steps:

- Open the **User Role List** screen and select the role to be deleted.
- Select the delete check box and click **Delete** for the role to be deleted.
- When you confirmed the delete action, the record will be permanently removed.

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Add Multiple Roles

This functionality enables you to assign multiple roles on one screen using drop down list boxes as shown below.

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Manage Users - Schema Access

A Signify database can be shared among any number of companies in the same group. Each company will function as a separate entity but managers and administrators can switch between the companies (called schemas in the system) to access the employees from the respective companies.

Specific rights must be given to a user before he/she will be able to switch between the companies/schemas in the database. Assigning schema rights is done in the **Role Assignment** section discussed earlier.

- Open the **List of Users** screen and select the user to assign reporting access.
- Select **Schema Access** from the side menu bar to open the **User Schema Access** screen.

On the screen shown below the user’s default schema is set, meaning the schema that will be active when the employee logs in.

Select the default schema from the drop-down list and click **Save**.

Manage Users - HR Processes Access

To assign user access to HR Process functionality, follow these steps:

- Open the List of Users screen and select the user to assign HR Processes to access.
- Select **HR Processes Access** from the side menu bar to display the list of reports a user can have access to.

You will now be able to assign user access to:

- Different request categories
- Request for Resignation

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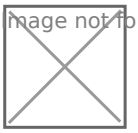
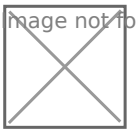
Manage Users - IR and PDP Roles

In order to link the Industrial Relations and PDP user roles to a user’s account, follow these steps:

- Open the List of Users screen and select the user to assign reporting access for.
- Select IR and PDP Roles from the side menu bar to display the Role Assignment screen.



Select the user roles and click **Save.**