

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.

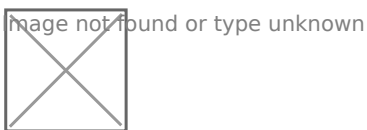
- **Foundation version.** Basic Employee Information Management is required as the foundation for any of the additional modules in the system.
- **Enterprise version.** This module includes all the advanced modules that are not explicitly listed below as a loose standing module - such as FAIS, Leave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

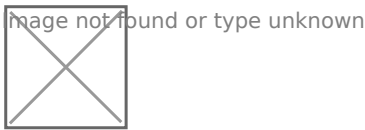


Personal Information

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.

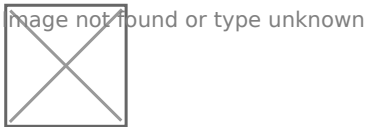
The Smart Navigation search functionality is available on the Employee Information screens as shown below. You can search on an Employee Number, Surname, Name or ID Number or part thereof.



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



| Mandatory Field Name | Description |
|----------------------|---|
| Employee Number | <p>If available, provide the employee’s proper employee number. In cases where the employee number is not yet available, use the employee’s National ID number until such time that an employee number becomes available. While typing any number in this field the system will validate the new number against all numbers already in the database, thereby preventing duplicates.</p> <p>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 <i>Create User Account</i> field for more information.</p> <p>The functionality to automatically generate employee numbers is available and can be activated if needed.</p> <p>If the override employee number functionality is active, an employee number can be assigned by the System Administrator himself.</p> |

| Mandatory Field Name | Description |
|----------------------|------------------------------|
| 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)

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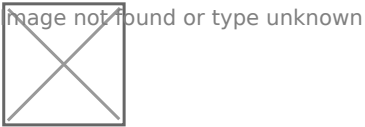
| Mandatory Field Name | Description |
|----------------------------|---|
| ID Number/ Passport Number | The ID number or Passport number should be entered. An optional setting is available to validate if the ID number is a valid South African ID. |
| Subsidiary | Sometimes a company may want to maintain 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

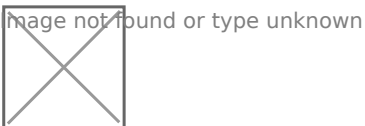


Address

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

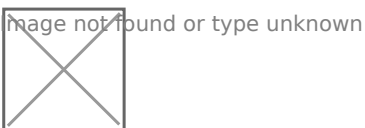
- **Home Physical Address**

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



- **Home Postal address** (Option: can be populated automatically if Home Postal address is same as Home Physical address)

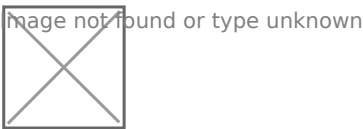
- Address
- City/Town/Village
- Country (Drop down list)
- Postal Code



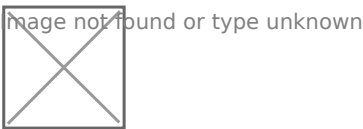
- **Business address**

- 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



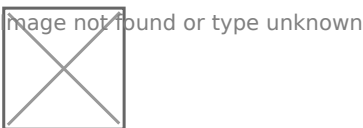
- Location
 - The Location field (Drop down list) should be populated in the **Manage Employees | Master Data | Location** section.



Contact Detail

Available in Foundation and Enterprise version

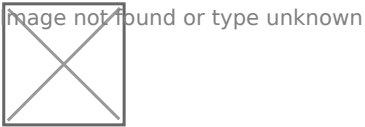
- Lists of contact details with local examples provided. The following fields are available:
 - Home Telephone Number
 - Work Telephone Number
 - Mobile Phone Number
 - Email Address
 - Fax Number
 - Skype Name
 - Some of this information can be updated by an employee from the Employee Self Service module



Documents

Available in Foundation and Enterprise version

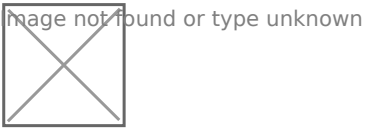
- Can attach documents such as an ID book, CV etc
 - Document Name
 - Category
 - Edit Document
 - Delete Document
 - View Details
 - Download Document



Dietary Requirements

Available in Foundation and Enterprise version

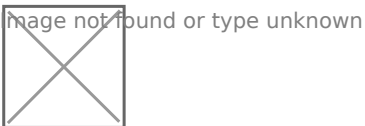
- Specify an employee's dietary preferences. Will be used in other modules.



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:

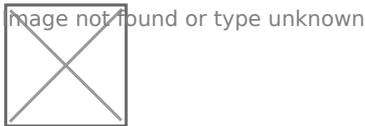
- Public Licenses
- Ad Hoc Licenses
- Licenses required by the employee's current job/position
- Licenses required by the employee's previous job/position

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

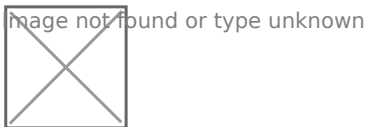
- Documents

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.

Revision #2

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