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

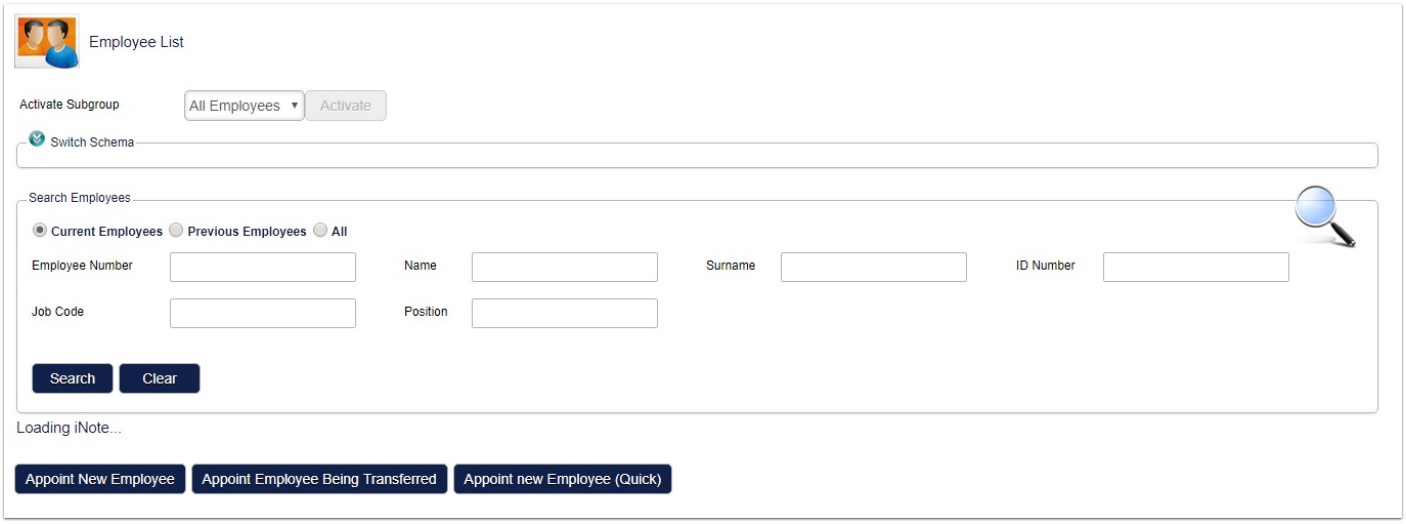
Navigation from the Home page:

- ***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



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.



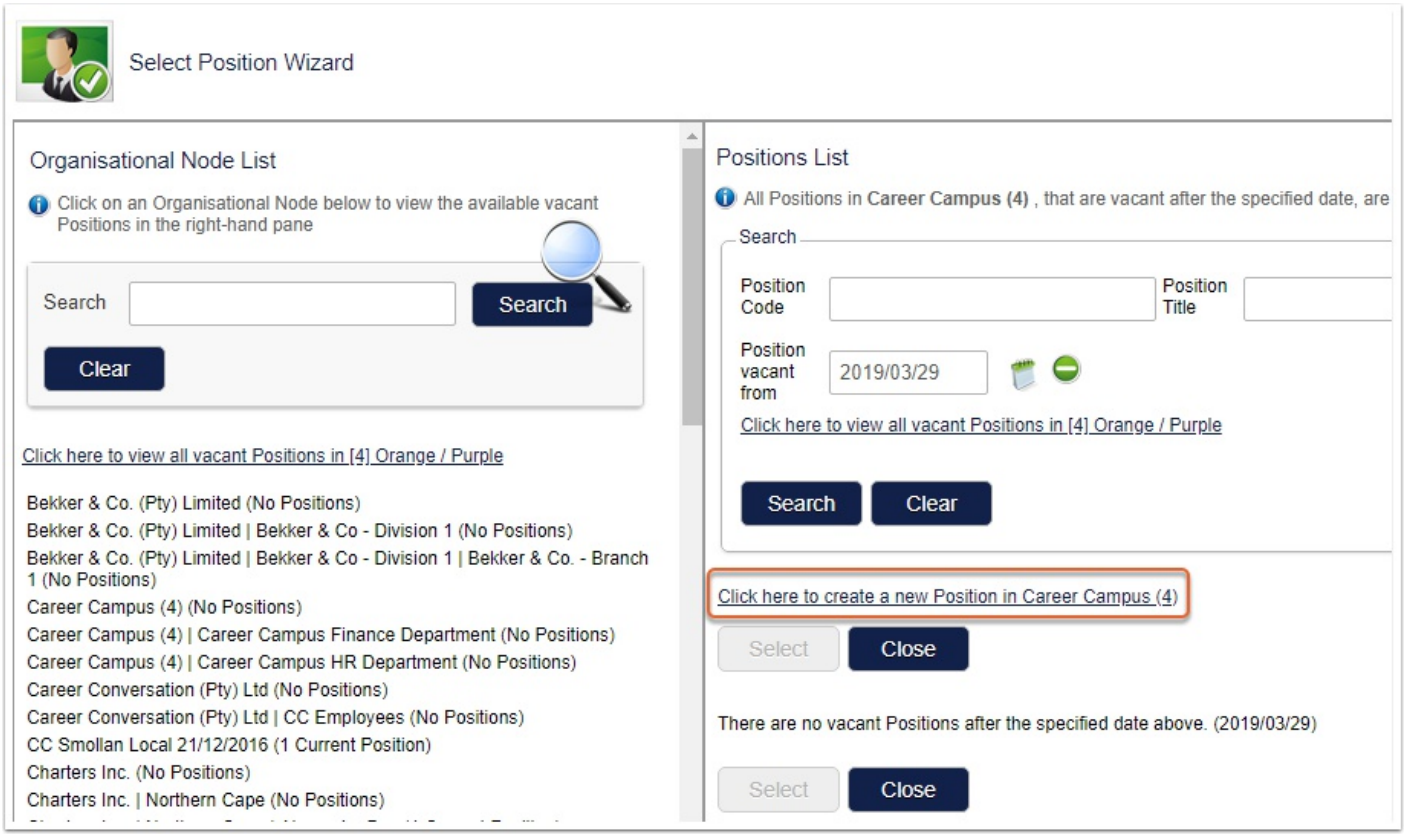
Appoint employee in a Position

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.





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.



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.



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