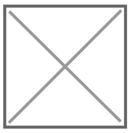
Organisational Assignment

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.



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.

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.

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.

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.

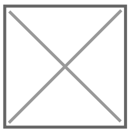
NOTE: This transfer process will end ONLY the selected active position.

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.



Transferring the Employee to another Position in the same Company

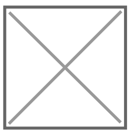
The **Transfer Employee /Appoint in new Position** screen is divided into two sections to make provision for the two options mentioned previously.

- 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:

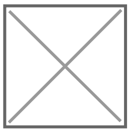
- All positions held by the employee are ended and the *TO* dates are filled in.
- The new active position is added.



Transferring the Employee to another Position in another Company

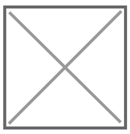
The **Transfer Employee /Appoint in new Position** screen is divided into two sections to make provision for the two options mentioned previously.

- 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.

Terminating an Appointment

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

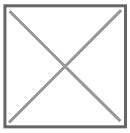
- Terminate the employee (including all active positions held by the person)
- Terminate a specific position

Terminating the Employee

Navigation from the Home page:

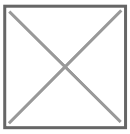
- ***System Administration | Modules | Manage Employees*** to open the Employee List screen.

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



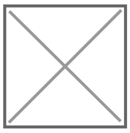
A list of all the positions that will be ended because of the employment termination are listed at the top of the screen.

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



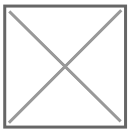
Terminate the Position/Appointment

- 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.



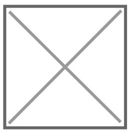
The position that will be ended is shown at the top of the page.

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



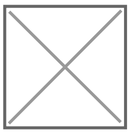
Make Corrections to an Appointment

- 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.

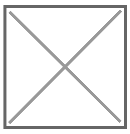
Click **Save** when done.



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.

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