

Master Data Maintenance

The **Master Data Library** serves as the foundational control layer for all standardised organisational data used across the system. Its purpose is to ensure that key reference data, such as genders, job titles, locations, document categories, and disciplinary outcomes, are centrally defined, consistently applied, and tightly governed.

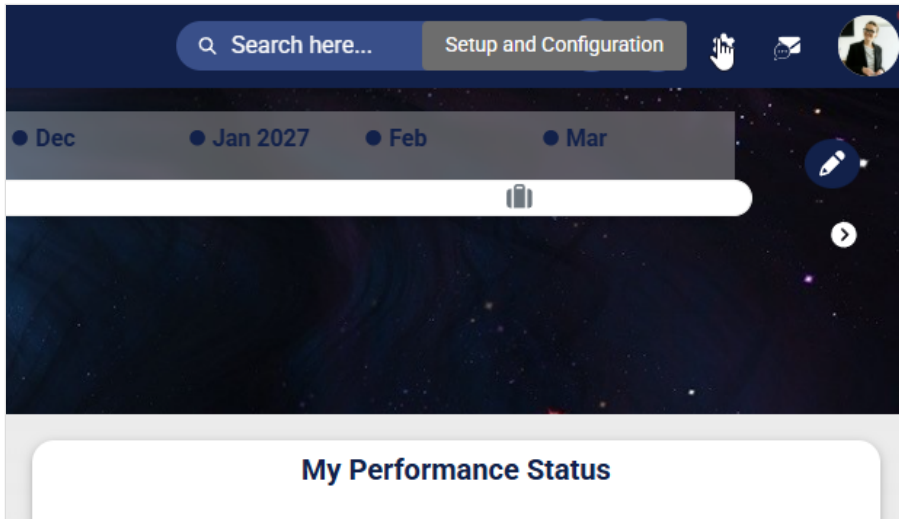


The screenshot shows the 'Master Data' interface. At the top, there is a search bar labeled 'Search here...' and several icons (info, help, settings, email, user profile). On the left side, there is a vertical sidebar with the 'Signify' logo and a list of icons representing different data categories. The main area contains a table with three columns: 'TITLE', 'DESCRIPTION', and 'PRIMARY PRODUCT'.

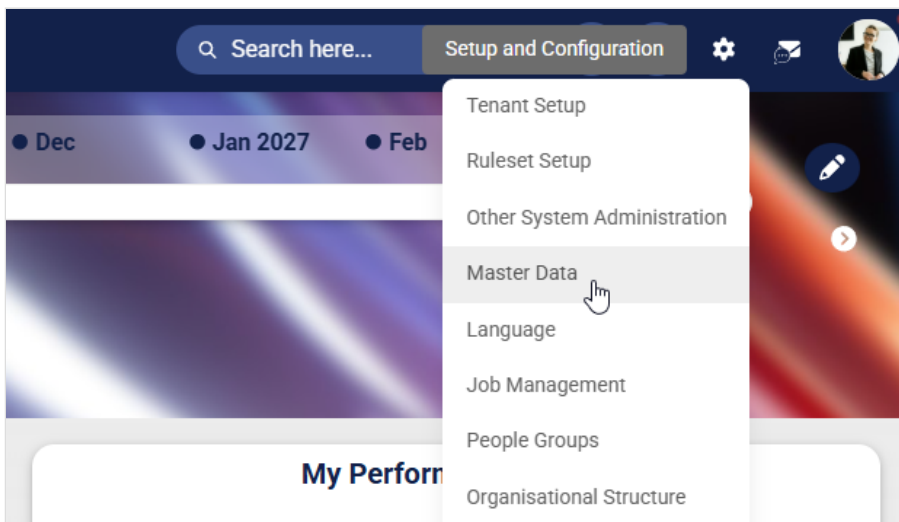
TITLE	DESCRIPTION	PRIMARY PRODUCT
Performance Management Section Items		Performance Management
Organisational Units		Job Profiler
Appointment Types		Job Profiler
Grading Scales		Job Profiler
Grading Types		Job Profiler
OFO Codes		Job Profiler
Occupational Categories		Job Profiler
Occupational Levels		Job Profiler
Termination Reasons		Job Profiler
Training Intervention Competencies		Job Profiler
Citizenships		People Management
Currencies		People Management
Disabilities		People Management
Genders		People Management
Home Languages		People Management
Initials		People Management
Marital Statuses		People Management
Permit Types		People Management
Races		People Management

Modules such as **Performance Management**, **Learning Management**, and **People Management** rely on master data setup to optimise certain features of these modules. It acts as a **single source of truth** for all structured, repeatable data elements used within employee profiles, processes, and reporting. Instead of allowing users to manually input free-text values, the system relies on predefined lists to maintain **consistency**, **accuracy**, and **alignment** across the organisation.

- Click the **gear icon** to access the **Setup and Configuration** menu.



- Select **Master Data** from the drop-down menu.



- The **Master Data Library** will open.

Master Data		
Search here...		
TITLE	DESCRIPTION	PRIMARY PRODUCT
Performance Management Section Items		Performance Management
Organisational Units		Job Profiler
Appointment Types		Job Profiler
Grading Scales		Job Profiler
Grading Types		Job Profiler
OFO Codes		Job Profiler
Occupational Categories		Job Profiler
Occupational Levels		Job Profiler
Termination Reasons		Job Profiler
Training Intervention Competencies		Job Profiler
Citizenships		People Management
Currencies		People Management
Disabilities		People Management
Genders		People Management
Home Languages		People Management
Initials		People Management
Marital Statuses		People Management
Permit Types		People Management
Races		People Management

- Use the **search bar** to filter by **People Management**.

Search here...



- For our example, we will configure master data for **Assets**. Most of the master data setup follows the same process, so these steps can be applied to any master data library entry. Click on the library item you would like to update.

People Document Categories	People Management
Assets	People Management
Asset Types	People Management
CvRecords	People Management

- The master data configuration for **Assets** will open. Each master data library is constructed in a similar way for consistency. Each row represents a **specific asset item** (e.g. *Laptop*, *Monitor*, *Hard Hat*, *Gloves*), along with several configuration controls.

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Master Data | Assets

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- Order**
Defines the display sequence of asset items. This determines how items appear in dropdowns or selection lists elsewhere in the system.
- Active**
Indicates whether the asset is currently available for use.
 - Active items can be assigned to employees
 - Inactive items are hidden but retained for historical data integrity
- Asset Type ID**
Groups assets into categories (e.g. *Hardware*, *Safety Gear*), helping with organisation and filtering.
- Default**
Marks whether an asset is automatically selected or prioritised in certain contexts. Only specific items may be designated as defaults.

- **Name**

The label of the asset as it will appear to users across the system.

- **Set Order By (button)**

Allows administrators to reorder the list dynamically, typically via drag-and-drop or sorting logic.

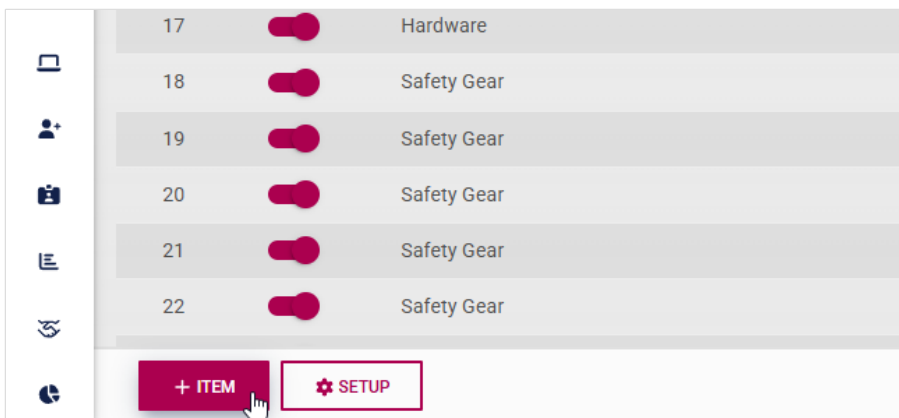
- **Required**

Determines whether this asset must be captured or assigned in relevant processes (e.g. onboarding or equipment allocation).

- **Last Edited (By User)**

Displays audit information showing when the item was last modified and by whom, supporting traceability and governance.

- To add a new master data entry, click **+ITEM**.



- Complete the form, noting which fields are **required** (marked by a *). Click **SAVE ADD NEW** to add another master data entry. Click **SAVE** when finished or click **CANCEL** to discard any changes.

- The master data is now ready for use. In our example, we have configured master data for **Assets**. These master data library items will be used to populate the **drop-down** menus when adding an asset to a person's profile.

People Management

Signify

SOFTWARE

AIMEE CAMPBELL

(10120157)

Chief of Operations (COO)

Go To Another

Welcome Notification

Password

SUMMARY

PROFILE

EXTENDED PROFILE

Permits

Assets

Vehicles

Next Of Kin

Criminal Record

Licences

Medical History

Employee Funding

Custom Fields

Additional Information

Custom & Additional Information

Hobbies & Interest

Notification Detail

USER PERMISSIONS

APPOINTMENT

PERFORMANCE MANAGEMENT

+ ASSET

ASSETS

TYPE	ITEM	DATE ISSUED	EXPECTED RETURN DATE	ACTUAL RETURN DATE
No data available in table				

ASSETS

TYPE				ACTUAL RETURN DATE
------	--	--	--	--------------------

Add A New Asset

Asset Type *

Hardware

Quantity *

1

Serial Number

Expected Return Date

DD/MM/YYYY

Asset Item

Computer

Computer

Laptop

Keyboard

Mouse

Monitor/Screen

Printer

Laptop Bag

Projector

Cellphone

Tablet

Telephone

Headset

External Camera

External Microphone

Speakers

Television

Other

Hard Hat

Reflective Jacket

Gloves

The Signify Software logo is located in the bottom right corner of the page. It features a dark blue background with a white stylized 'S' icon to the left of the text 'Signify' in a large, white, sans-serif font, with 'SOFTWARE' in a smaller, white, sans-serif font below it.

Revision #3

Created 2025-02-03 14:50:27 UTC by Chanan Stenden

Updated 2026-03-30 05:16:32 UTC by Chanan Stenden