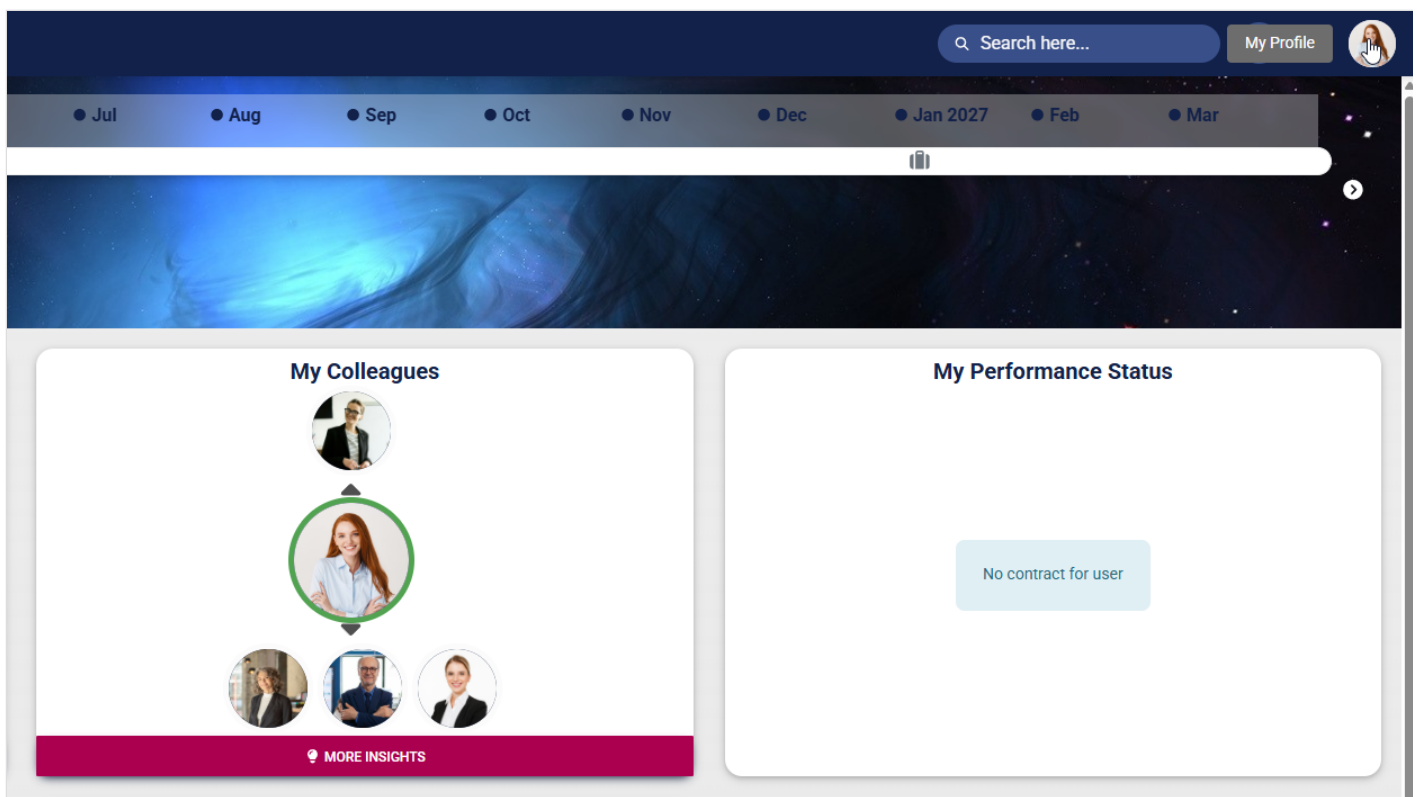


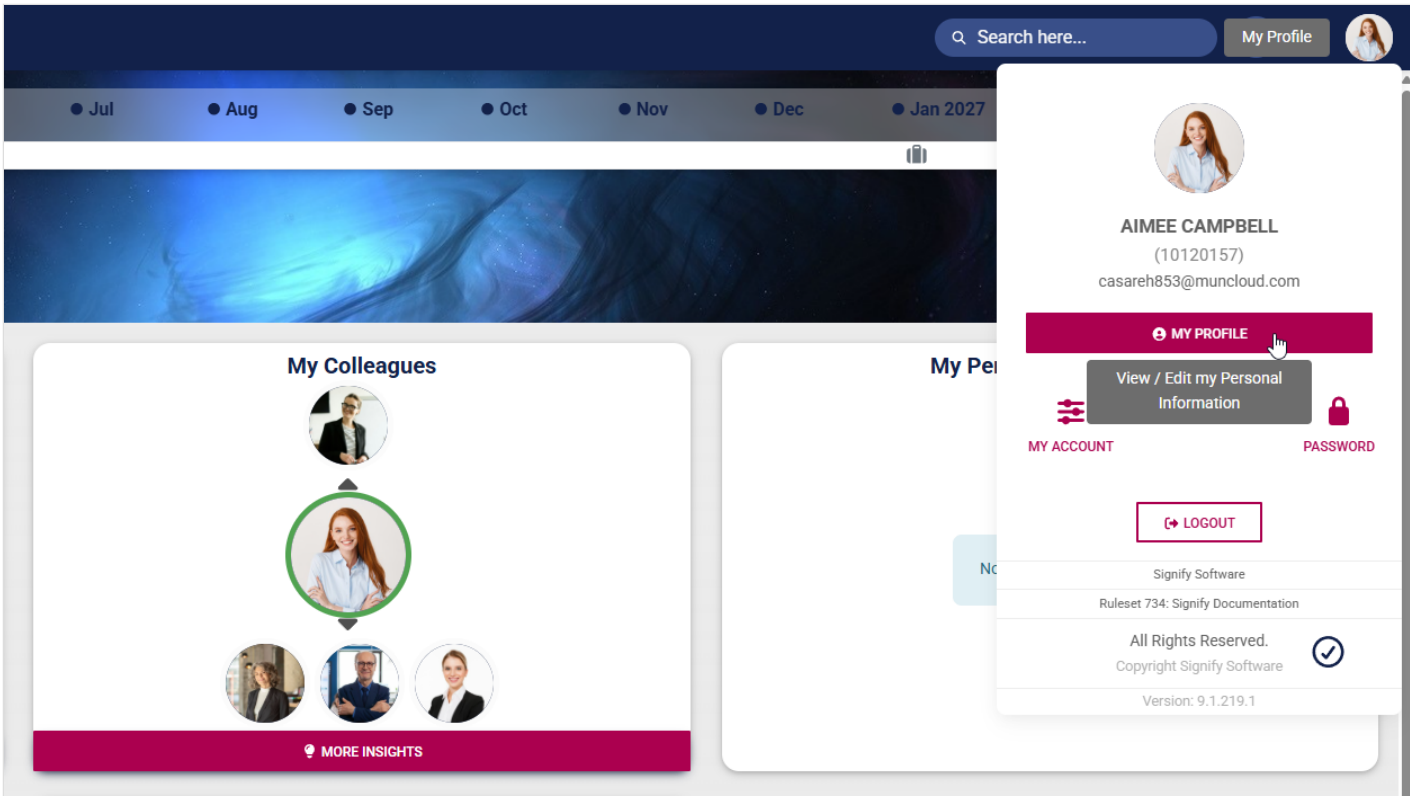
Update a Person's Profile

For users: Update your own profile

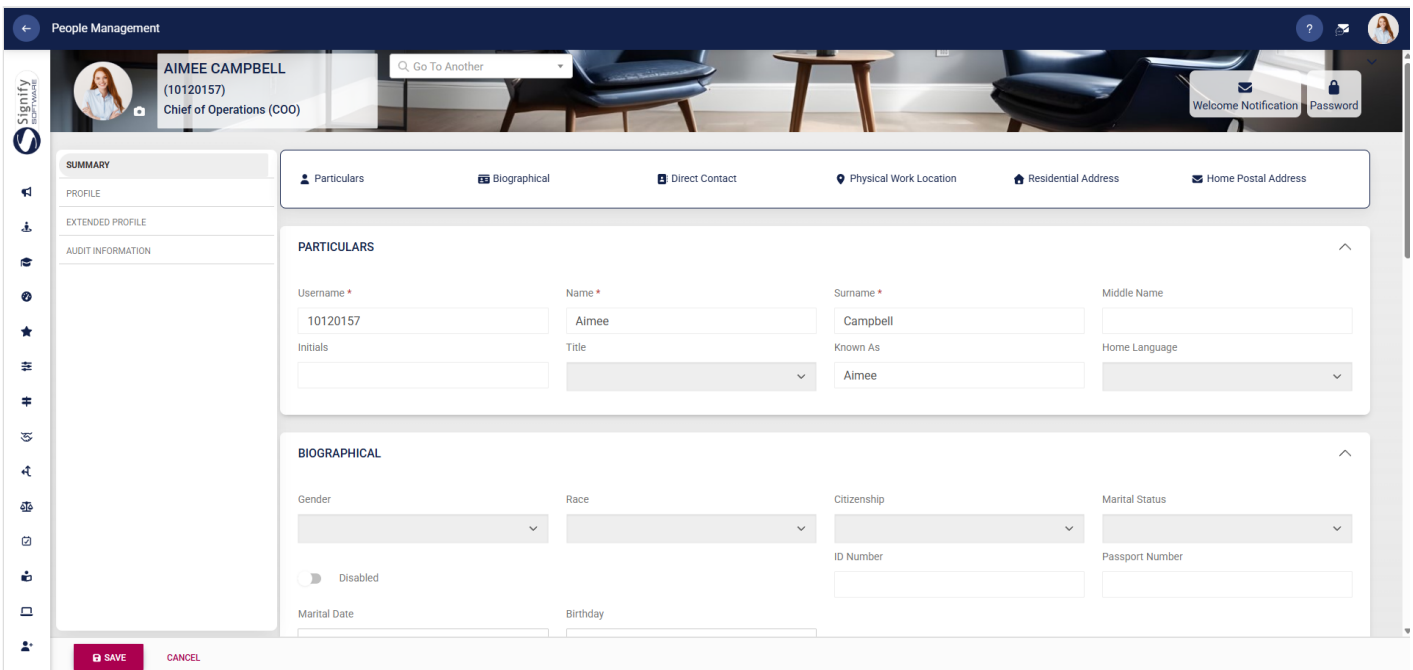
- Click on your **profile icon** at the top of the screen to access the **main menu**.



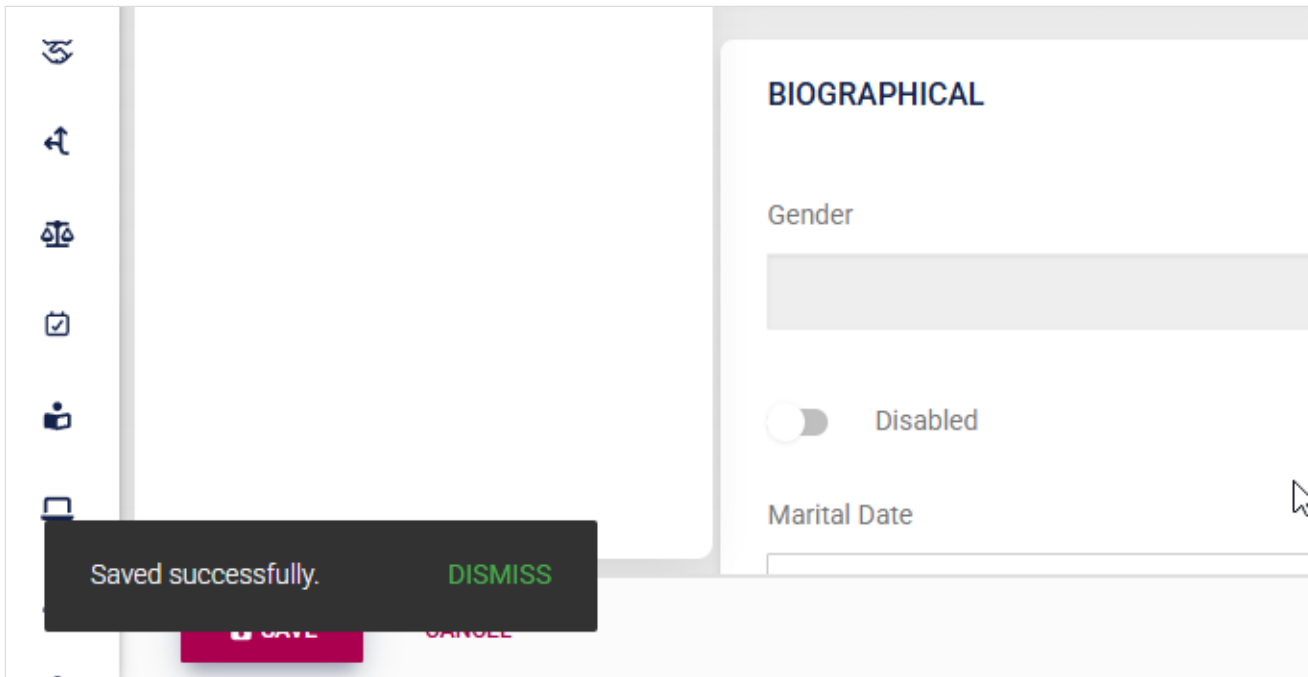
- Click **MY PROFILE** to view or edit your user profile.



- Your profile will open. Use the **left-hand menu** to navigate to the profile section you would like to update. Fields that are not editable will be greyed out. Update your information as necessary, then click **SAVE** to update your profile, or **CANCEL** to discard your edits.



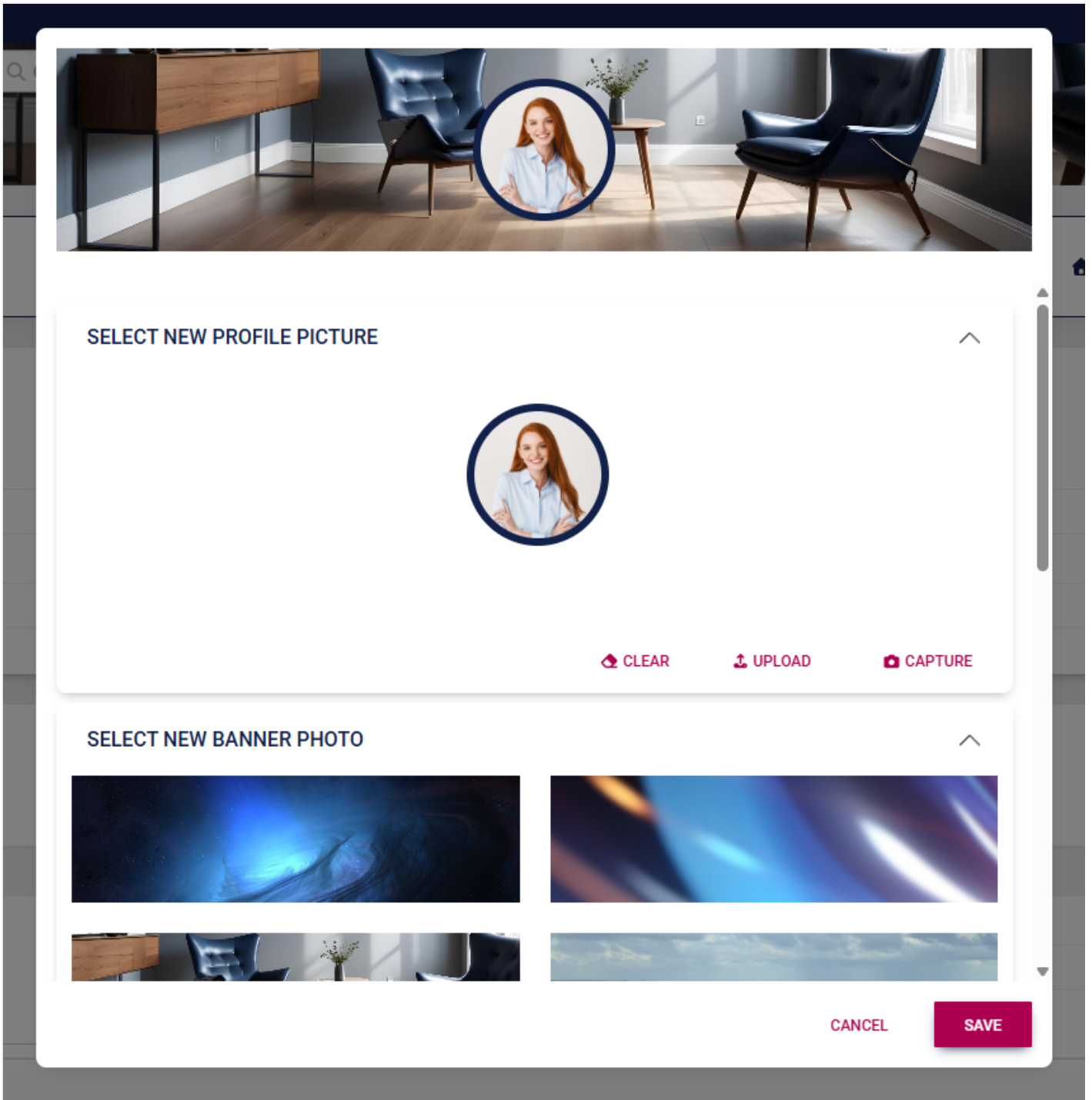
- A message will pop up to confirm that your profile's details have been updated.



- Please note that, based on your access permissions, you may not be able to view or edit some sections of your profile. If you encounter a problem, contact your system administrator to help with updating your information.
- Click on your **profile picture** on your profile banner to update your photo.

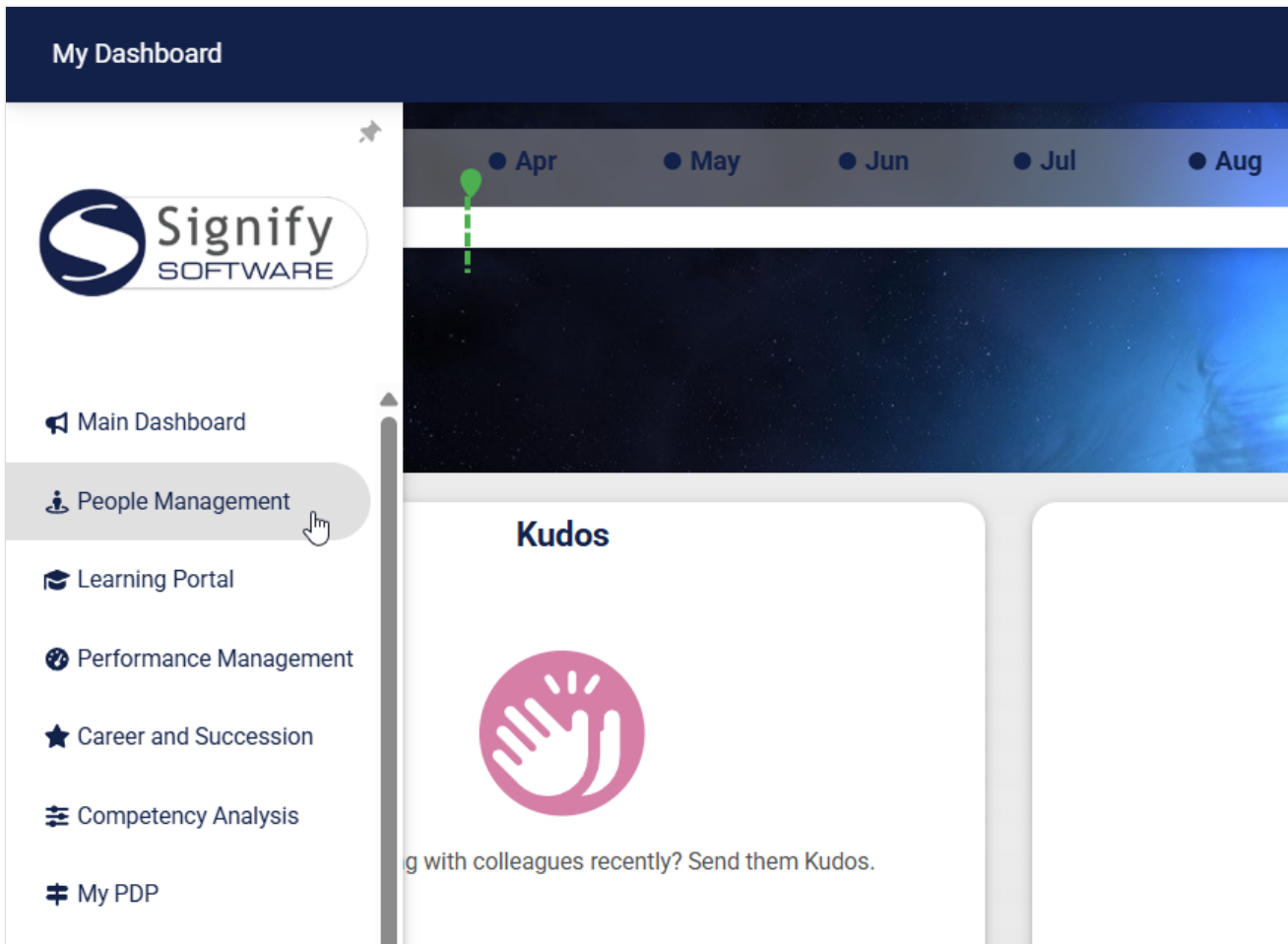


- Upload your new photo using the options provided. If enabled, you may also update your banner image. Click **SAVE** to update your profile, or click **CANCEL** to discard your edits.

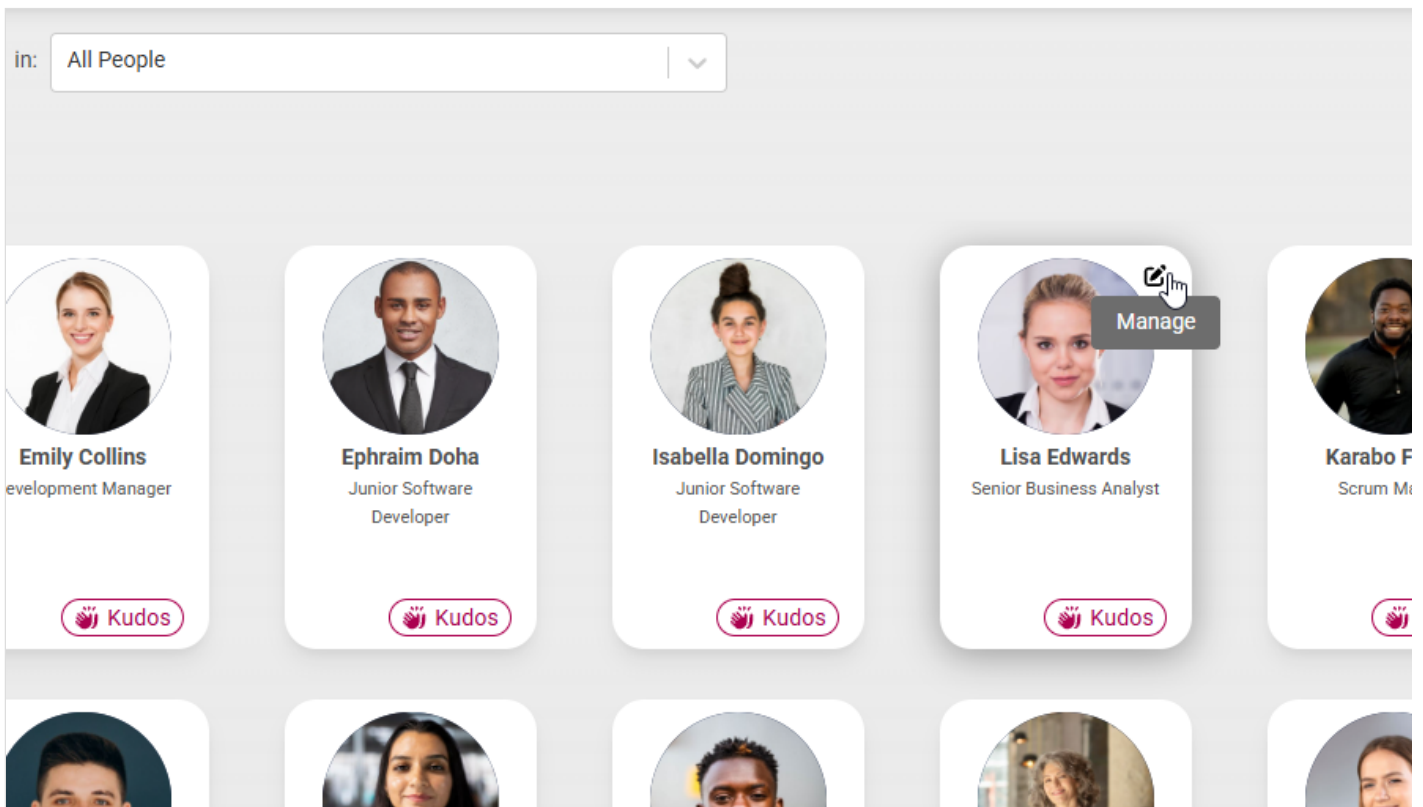


For administrators: Update a user's profile

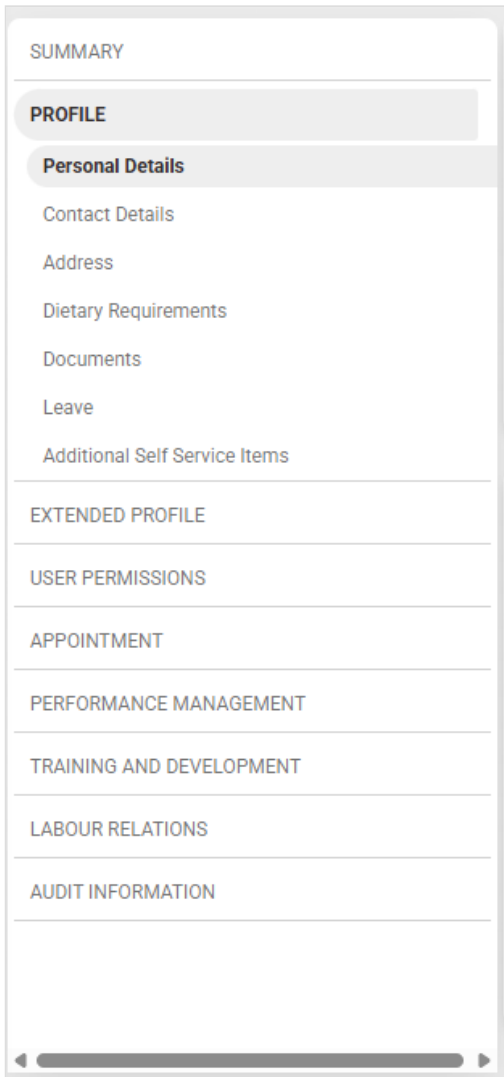
- Use the **sidebar menu** to navigate to the **People Management** module.



- Locate the person you would like to update, then click the **pencil icon** to manage their profile.



- The person's profile will open. Use the **left-hand menu** to navigate to the profile section you would like to update.



Summary

- Use the **left-hand menu** to navigate to **Summary**.
- Use this screen as a quick reference to update details in the following sections:
 - User particulars
 - Biographical information
 - Direct contact details
 - Physical work location
 - Residential address
 - Home postal address
 - Reporting lines
- Edits made to this screen will be reflected in the relevant profile section.
- Click **SAVE** to update the profile, or click **CANCEL** to discard your edits.

People Management

AIMEE CAMPBELL
(10120157)
Chief of Operations (COO)

Go To Another

Welcome Notification Password

SUMMARY

PROFILE

EXTENDED PROFILE

USER PERMISSIONS

APPOINTMENT

PERFORMANCE MANAGEMENT

TRAINING AND DEVELOPMENT

LABOUR RELATIONS

AUDIT INFORMATION

Particulars

Biographical

Direct Contact

Social Contact

Physical Work Location

Residential Address

Home Postal Address

Reporting Lines

PARTICULARS

Username * 10120157

Name * Aimee

Surname * Campbell

Middle Name

Initials

Title

Known As Aimee

Home Language

BIOGRAPHICAL

Gender Female

Race White

Citizenship South African

Marital Status Single

Disabled

ID Number

Passport Number

Marital Date DD/MM/YYYY

Birthdate 31/01/1989

DIRECT CONTACT DETAILS

SAVE CANCEL

Profile

Personal details

- Use the **left-hand menu** to navigate to **Personal Details**.
- Complete the fields such as username, name, surname, title, and known as. Fields marked with a red asterisk (*) are compulsory.
- Provide additional biographical details, including gender, citizenship, marital status, and date of birth.
- Click **SAVE** to update the profile, or click **CANCEL** to discard your edits.

People Management

Signify
SOLUTIONS

AIMEE CAMPBELL
(10120157)
Chief of Operations (COO)

Go To Another

Welcome Notification Password

SUMMARY

PROFILE

Personal Details

Contact Details

Address

Dietary Requirements

Documents

Leave

EXTENDED PROFILE

USER PERMISSIONS

APPOINTMENT

PERFORMANCE MANAGEMENT

TRAINING AND DEVELOPMENT

LABOUR RELATIONS

AUDIT INFORMATION

PARTICULARS

Username * 10120157

Name * Aimee

Surname * Campbell

Middle Name

Initials

Title

Known As Aimee

Home Language

BIOGRAPHICAL

Gender Female

Race White

Citizenship South African

Marital Status Single

Disabled

ID Number

Passport Number

Marital Date DD/MM/YYYY

Birthdate 31/01/1989

SAVE CANCEL

Contact details

- Use the **left-hand menu** to navigate to **Contact Details**.
- Enter or update phone numbers and email addresses under **Direct Contact**.
- Capture social media or platform-related details under **Social Contact**, where applicable.
- Click **SAVE** to update the profile, or click **CANCEL** to discard your edits.

People Management

Signify
SOLUTIONS

AIMEE CAMPBELL
(10120157)
Chief of Operations (COO)

Go To Another

Welcome Notification Password

SUMMARY

PROFILE

Personal Details

Contact Details

Address

Dietary Requirements

Documents

Leave

EXTENDED PROFILE

USER PERMISSIONS

APPOINTMENT

PERFORMANCE MANAGEMENT

TRAINING AND DEVELOPMENT

LABOUR RELATIONS

AUDIT INFORMATION

DIRECT CONTACT

Home Number +27 000 000 0000

Mobile Number +27 000 000 0000

Work Number +27 000 000 0000

Alternate Mobile Number +27 000 000 0000

Email * casareh853@munccloud.com

Alternate Email chanan.stenden@signify.co.za

SOCIAL CONTACT

Facebook

LinkedIn

Microsoft

Google

Instagram

Twitter

SAVE CANCEL

Address

- Use the **left-hand menu** to navigate to **Address**.
- Select the **Physical Work Location** and complete the associated address fields where required.
- Review or populate the **Business Address**, which is linked to the organisational unit.
- Enter the **Residential Address**, including suburb, city, province, country, and postal code.
- Click **SAVE** to update the profile, or click **CANCEL** to discard your edits.

The screenshot displays the 'People Management' interface for Aimee Campbell, Chief of Operations (COO). The left-hand navigation menu includes sections for SUMMARY, PROFILE (Personal Details, Contact Details, Address, Dietary Requirements, Documents, Leave), EXTENDED PROFILE, USER PERMISSIONS, APPOINTMENT, PERFORMANCE MANAGEMENT, TRAINING AND DEVELOPMENT, LABOUR RELATIONS, and AUDIT INFORMATION. The main content area is divided into three sections: 1. PHYSICAL WORK LOCATION: Includes a 'Location' dropdown menu currently set to 'Working at the Office', and fields for 'Floor Number', 'Building', 'Complex Name', 'Street Number and Name', 'Suburb / District', 'City / Town', 'Country', 'Province', and 'Postal Code'. 2. BUSINESS ADDRESS: A note stating 'Showing the business address of the organisation unit's location' and 'There is currently no Business Address specified on the organisation unit.' 3. RESIDENTIAL ADDRESS: A form with fields for 'Unit Number', 'Complex Name', 'Street Number', 'Street Name', 'Suburb / District', 'City / Town', 'Country *' (set to 'South Africa'), 'Province *' (set to 'Eastern Cape'), and 'Postal Code'. At the bottom of the form are 'SAVE' and 'CANCEL' buttons.

Dietary requirements

- Use the **left-hand menu** to navigate to **Dietary Requirements**.
- Click **ADD** to capture a new dietary requirement.
- Select and define the relevant dietary information as required.
- Use **DELETE** to remove an existing entry, if necessary.

The screenshot shows the 'People Management' interface. At the top, there's a header with 'People Management' and user profile information for 'AIMEE CAMPBELL (10120157) Chief of Operations (COO)'. A search bar 'Go To Another' is visible. The left-hand menu lists various sections: SUMMARY, PROFILE (Personal Details, Contact Details, Address), Dietary Requirements (Documents, Leave), EXTENDED PROFILE, USER PERMISSIONS, APPOINTMENT, PERFORMANCE MANAGEMENT, TRAINING AND DEVELOPMENT, LABOUR RELATIONS, and AUDIT INFORMATION. The main content area is titled 'DIETARY REQUIREMENT (10120157, AIMEE CAMPBELL)' and contains an information box: 'Specify an employee's dietary preferences. Will be used in other modules.' Below this are 'ADD' and 'DELETE' buttons. A message below the buttons states: 'No results found for your current search criteria'.

Documents

- Use the **left-hand menu** to navigate to **Documents**.
- Upload required documents by clicking **UPLOAD**.
- Review the document status: a **tick** indicates uploaded, and a **cross** indicates outstanding.
- Use the sections for **Additional Documents**, **Documents You Received**, and **Recycle Bin** to organise and manage files.
- Click **CANCEL** if you do not wish to proceed with uploads.

People Management

AIMEE CAMPBELL
(10120157)
Chief of Operations (COO)

Go To Another

Summary

Profile

- Personal Details
- Contact Details
- Address
- Dietary Requirements
- Documents
- Leave

Extended Profile

User Permissions

Appointment

Performance Management

Training and Development

Labour Relations

Audit Information

REQUIRED DOCUMENTS

The following documents are required. A ✓ indicates that a document has been uploaded, a ✗ indicates that the document is still outstanding.

NAME	CATEGORY	DATE UPLOADED
No data available in table		

ADDITIONAL DOCUMENTS

DOCUMENTS YOU RECEIVED

RECYCLE BIN

UPLOAD CANCEL

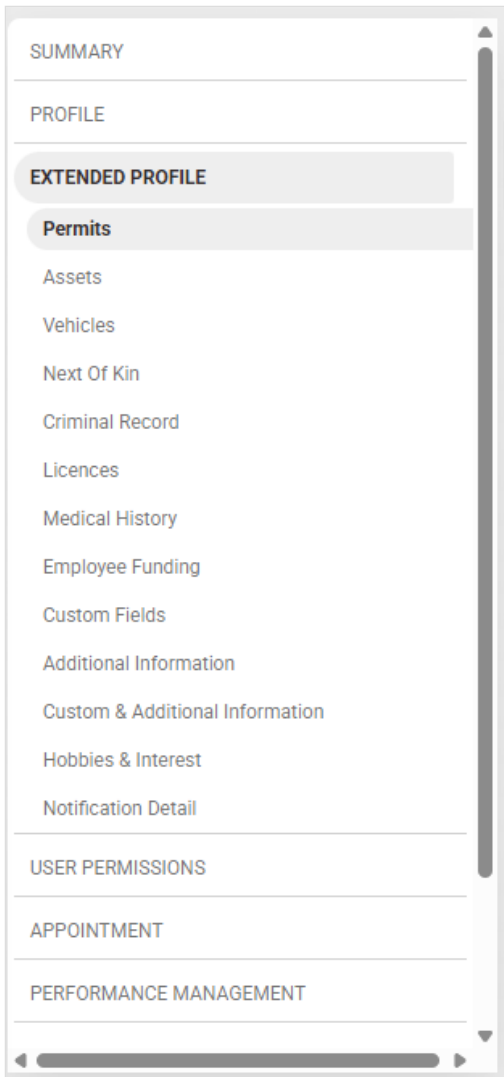
Leave

- Use the **left-hand menu** to navigate to **Leave**.
- Enter the **Leave Group Start Date** and assign the appropriate **Leave Group** and **Work Schedule**.
- Ensure the employee is linked correctly, as leave cannot be booked without these configurations.
- Click **CONTINUE** to proceed with further leave configuration.

The screenshot displays the 'People Management' interface for Aimee Campbell (10120157), Chief of Operations (COO). The left sidebar contains a navigation menu with categories: SUMMARY, PROFILE, EXTENDED PROFILE, USER PERMISSIONS, APPOINTMENT, PERFORMANCE MANAGEMENT, TRAINING AND DEVELOPMENT, LABOUR RELATIONS, and AUDIT INFORMATION. The main content area is titled 'The current leave details for Aimee Campbell (10120157)'. Below this, there are tabs for SETTINGS, CONFIGURATION, RECORDS, ADJUSTMENTS, CYCLES, ACCRUALS, BALANCE SUMMARY, and BALANCE STATEMENTS. A blue banner contains the instruction: 'Link the employee to the correct Leave Group and Work Schedule. Should an employee not be linked to a Leave Group and Workschedule, they will not be able to book any leave.' The form fields are: 'Leave Group Start Date' (01/01/2018), 'Leave Group' (N/A), and 'Work Schedule' (N/A). There is a checkbox for 'Transfer to a new leave group in the future' which is currently unchecked. A red 'CONTINUE' button is visible at the bottom of the form.

Extended Profile

- Click on **EXTENDED PROFILE** to access the **Extended CORE** module's advanced people management features.



Permits

- Click to navigate to **Permits**, then click **+PERMIT** to add a new permit.

The screenshot shows a user profile interface. On the left is a navigation menu with icons for home, profile, extended profile, permits, assets, vehicles, next of kin, criminal record, licences, medical history, employee funding, custom fields, additional information, and custom & additional. The 'EXTENDED PROFILE' section is active, and the 'Permits' sub-section is selected. Below this is a table with the following headers: PERMIT TYPE, VALID FROM, VALID TO, and PERMIT NUMBER. The table content is currently empty, displaying 'No data'. At the bottom left of the profile area is a red button labeled '+ PERMIT'.

- Fill in the permit information, including the permit type, number, and validity. Please note that the fields marked with a red asterisk (*) are compulsory.
 - The permit type forms part of the **master data**. To configure this, please see the [Master Data Maintenance](#) section later in this chapter.
- Click **SAVE** when you are finished or click **CANCEL** to discard your edits.

The screenshot shows a modal window titled 'Add A New Permit'. The form contains the following fields:

- Permit Type ***: A dropdown menu with 'Chemical' selected.
- Valid From**: A date input field with the placeholder 'DD/MM/YYYY' and a calendar icon.
- Valid To**: A date input field with the placeholder 'DD/MM/YYYY' and a calendar icon.
- Permit Nr ***: A text input field.
- Comments**: A text area.
- International Permit**: A toggle switch that is currently turned off.

 At the bottom right of the modal are two buttons: 'CANCEL' and a red 'SAVE' button with a save icon.

Assets

- Click to navigate to **Assets**, then click **+ASSET** to add a new asset.

The screenshot shows a user interface for managing assets. On the left is a vertical navigation menu with icons for Home, Profile, Extended Profile, Vehicles, Next Of Kin, Criminal Record, Licences, Medical History, Employee Funding, Custom Fields, Additional Information, and Custom & Additional. The 'Assets' option is highlighted. The main content area is titled 'ASSETS' and contains a table with the following headers: TYPE, ITEM, DATE ISSUED, and EXPECTED. The table is currently empty, with 'No data' displayed in the bottom right corner. A red button labeled '+ ASSET' is located at the bottom left of the main content area.

- Fill in the asset information, such as the:
 - Asset type
 - Asset item
 - Quantity
 - Description
 - Serial number
 - Issued date
 - Expected return date
 - Actual return date
- Please note that the fields marked with a red asterisk (*) are compulsory.
 - The asset item and asset type form part of the **master data**. To configure this, please see the [Master Data Maintenance](#) section later in this chapter.
- Click **SAVE** when you are finished or click **CANCEL** to discard your edits.

Add A New Asset

Asset Type*

Asset Item

Quantity

Description

Serial Number

Date Issued

Expected Return Date

Actual Return Date

[CANCEL](#) [SAVE](#)

Vehicles

- If the employee is to bring vehicles onto the premises, the vehicle information can be captured by clicking **Vehicles**, then **ADD**.

People Management

JACKEE ADAMS
(22337)
Business Support SME

VEHICLE LIST (22337, JACKEE ADAMS)

ADD **DELETE**

No results found for your current search criteria

- Fill in the vehicle's information, such as the make, model, registration number, manufacture year, benefit type, and other useful information. Please note that the fields

marked with a red asterisk (*) are compulsory.

- Click **SAVE** when you are finished, **SAVE ADD NEW** to add another vehicle, or click **BACK TO LIST** to discard your edits.

VEHICLE DETAIL (22337, JACKEE ADAMS)

A register of vehicles owned or driven by an employee. This information is important if the employee

Vehicle List

Make *	<input type="text"/>
Model	<input type="text"/>
Engine Capacity	<input type="text"/>
Registration Number	<input type="text"/>
Benefit Type	<input type="text"/>
Repayment Period	1 To be specified

Next of Kin

- To capture the person's emergency contacts or dependents' information, click **Next of Kin** and then click **+NEXT OF KIN**.

SUMMARY

PROFILE

- EXTENDED PROFILE
- Permits
- Assets
- Vehicles
- Next Of Kin**
- Criminal Record
- Licences
- Medical History
- Employee Funding
- Custom Fields
- Additional Information
- Custom & Additional

NEXT OF KIN

RELATIONSHIP	EMERGENCY CONTACT	NAME
No data		

+ NEXT OF KIN

- Use the form to capture the next of kin's contact information. Please note that the fields marked with a red asterisk (*) are compulsory.
 - The relationship type forms part of the **master data**. To configure this, please see the [Master Data Maintenance](#) section later in this chapter.
- Click **SAVE** when you are finished or click **CANCEL** to discard your edits.

The screenshot shows a web application interface with a modal form titled "Add Next of Kin Details". The background shows a user profile for "JACKEE ADAMS (22337) Business Support SME" and a "NEXT OF KIN" section. The modal form is divided into two main sections: "Personal Details" and "Contact Details".

Personal Details:

- Relationship * (Dropdown menu): Brother
- Is Dependent (Toggle switch): Off
- Emergency Contact (Toggle switch): Off
- Name * (Text input): [Empty]
- Surname * (Text input): [Empty]
- Preferred Name (Text input): [Empty]
- Person Initials (Text input): [Empty]
- Title (Dropdown menu): Miss
- Gender (Dropdown menu): Male
- Nationality (Dropdown menu): South African
- ID Number (Text input): [Empty]
- Passport Number (Text input): [Empty]

Contact Details:

- Email Address (Text input): [Empty]
- Mobile Number (Text input with country code dropdown): [Empty]
- Home Number (Text input with country code dropdown): [Empty]
- Work Number (Text input with country code dropdown): [Empty]

At the bottom right of the modal, there are two buttons: "CANCEL" and "SAVE".

Criminal Record

- If the employee has a criminal record, the information can be documented by clicking Criminal Record, then **ADD**.

The screenshot shows a user profile for Jackee Adams (22337), Business Support SME. A sidebar on the left lists various profile sections, with 'Criminal Record' highlighted. The main content area is titled 'CRIMINAL RECORD LIST (22337, JACKEE ADAMS)' and includes a description: 'A register of an employee's criminal offences and related documentation'. Below this is an 'ADD' button and a message: 'No results found for your current search criteria'.

- Capture the employee's criminal record details, such as:
 - Nature of the offence
 - Sentence imposed
 - Sentencing date
 - Sentence expiry date
 - Case number
 - Police station where the case was registered
 - Court name
- Please note that the fields marked with a red asterisk (*) are compulsory.
 - The nature of the offence forms part of the **master data**. To configure this, please see the [Master Data Maintenance](#) section later in this chapter.
- Click **SAVE** when you are finished, **SAVE ADD NEW** to add another record entry, or click **BACK TO LIST** to discard your edits.

CRIMINAL RECORD DETAIL (22337, JACKEE ADAMS)

A register of an employee's criminal offences and related documentation

Criminal Record

DETAIL DOCUMENTS

Nature of offence *

Sentence imposed / outcome *

Date sentenced *

Sentence expiry date *

Licences

- A list of licences required for the employee's position, as well as any other licences the employee holds, can be documented by clicking **Licences**. To add a new licence, click Add Ad Hoc Licence.

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

No public licences have been acquired by the employee.

Ad hoc licences acquired by the employee

ADD AD HOC LICENCE

No Ad Hoc Licences have been assigned to / done by the employee.

Licences required by the employee's current job/position.

No job/position specific licences have been loaded.

Previous Licenses

No previous job/position licences have been found.

- Complete the licence detail form. Please note that the fields marked with a red asterisk (*) are compulsory.
 - Some of the licence detail fields can be set up in the **master data**. To configure this, please see the [Master Data Maintenance](#) section later in this chapter.

- Click **SAVE** to update the profile, or **BACK** to discard your edits.

- The licence data can be refreshed by clicking on Process Licences for this Employee.

Medical History

- The employee's medical history can be documented by clicking on **Medical History**.
- Capture the relevant details of the employee's medical history, such as:
 - General physical health
 - Systems' health
 - Existing medical conditions

- Occupational diseases
- Past referrals to other specialists
- Important medical history documents
- Some of the medical history fields can be set up in the **master data**. To configure this, please see the [Master Data Maintenance](#) section later in this chapter.

The screenshot displays the 'MEDICAL HISTORY DETAIL' for Jackee Adams (22337), a Business Support SME. The page features a navigation sidebar on the left with categories like SUMMARY, PROFILE, and EXTENDED PROFILE. The main content area is titled 'MEDICAL HISTORY DETAIL (22337, JACKEE ADAMS)' and includes a descriptive paragraph about the medical history summary. Below this, there are six tabs: GENERAL PHYSICAL, SYSTEMS, EXISTING CONDITIONS, OCCUPATIONAL DISEASES, REFERRALS, and DOCUMENTS. The 'GENERAL PHYSICAL' tab is selected, showing the following fields:

Blood Pressure	High
Pulse	
Height	m
Weight	Kg
Calculated BMI	

Employee Funding

- Employee funding, such as a bursary or an employee personal loan, can be documented by clicking on **Employee Funding** and then clicking on **ADD**.


The screenshot shows a user interface for an employee profile. At the top left, there is a profile card for Jackee Adams (22337), Business Support SME. A search bar at the top right contains the text 'Go To Another'. The main content area is titled 'EMPLOYEE FUNDING LIST (22337, JACKEE ADAMS)'. Below the title is a blue banner with an information icon and the text 'A list of Employee Funding for the selected employee.' A search section follows, with a search bar and a dropdown menu for 'Employee Funding Type' set to '--- All ---'. There is also a checkbox for 'Is Settled' which is currently unchecked. Below the search section are two buttons: 'ADD' and 'DELETE'. At the bottom of the search section, an orange banner displays a warning icon and the text 'No results found for your current search criteria'. On the left side, there is a sidebar with a list of navigation options: SUMMARY, PROFILE, EXTENDED PROFILE (highlighted), Permits, Assets, Vehicles, Next Of Kin, Criminal Record, Licences, Medical History, Employee Funding (highlighted), Custom Fields, Additional Information, Custom & Additional Information, and Hobbies & Interest.

- Details of the employee's funding can be captured by filling in the form. Please note that the fields marked with a red asterisk (*) are compulsory.
 - Some of the employee funding fields can be set up in the **master data**. To configure this, please see the [Master Data Maintenance](#) section later in this chapter.
- Click **SAVE** when you are finished, **SAVE ADD NEW** to add another record entry, or click **BACK** to discard your edits.

The screenshot shows a user interface for an employee profile. At the top left, there is a profile card for **JACKEE ADAMS** (22337), Business Support SME, with a search bar labeled "Go To Another". The left sidebar contains a navigation menu with categories: SUMMARY, PROFILE, and EXTENDED PROFILE. Under EXTENDED PROFILE, items include Permits, Assets, Vehicles, Next Of Kin, Criminal Record, Licences, Medical History, **Employee Funding** (highlighted), Custom Fields, Additional Information, Custom & Additional Information, and Hobbies & Interest. The main content area is titled "EMPLOYEE FUNDING LIST (22337, JACKEE ADAMS)" and features a teal action bar: "Capture or edit the detail of Employee Funding". Below this is a breadcrumb "Employee Funding List » [New]". A tabbed interface has "DETAIL" selected, with "REPAYMENTS" and "DOCUMENTS" as options. The form fields include: "Type *" with a dropdown menu showing "Bursary"; "Funding Amount *" with an empty input field; "Description" with a large text area; and "Date Allocated" with a date picker icon and an empty input field.

Custom and Additional Fields

- **Custom Fields, Additional Information, and Custom and Additional Information** are menu items that can be used to document additional information about the employee. These fields can be set up in the **master data**. To configure this, please see the [Master Data Maintenance](#) section later in this chapter.




JACKEE ADAMS
(22337)
Business Support SME

- 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

CUSTOM FIELDS (22337, JACKEE ADAMS)

SETTING PRS CUSTOM FIELD DESCRIPTION1

CV document received	<input type="text"/>
CV document date received	<input type="text"/>
Additional documents received	<input type="text"/>
Has Medical Aid	<input type="text"/>
Number of dependants	<input type="text"/>
Name of Medical Aid	<input type="text"/>
Medical Aid number	<input type="text"/>









JACKEE ADAMS
(22337)
Business Support SME

- 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


ADDITIONAL INFORMATION (22337, JACKEE ADAMS)

Rename and use the field lookups to collect information on any other topic (e.g. favorite holiday spot) th

Level of experience in Financial industry	<input type="text"/>	
Level of experience with payment portals	<input type="text"/>	
OFO Code	<input type="text"/>	
Pension Scheme	<input type="text"/>	
Socio Economic Status	<input type="text"/>	
Employment Type	<input type="text" value="Local"/>	

 **SAVE**

CLEAR



JACKEE ADAMS
(22337)
Business Support SME

Go To Another

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

TRAINING AND DEVELOPMENT

Custom And Additional Information (22337,Jackee Adams)

ADDITIONAL INFORMATION CUSTOM FIELDS

Level of experience in Financial industry

Level of experience with payment portals

OFO Code

Pension Scheme

Socio Economic Status

Employment Type Local

SAVE

Hobbies and Interests

- The employee's hobbies and interests can be noted by clicking on **Hobbies and Interests**. Fill in the details about their hobbies and interests, then click **SAVE** when you are finished.

JACKEE ADAMS
(22337)
Business Support SME

Go To Another

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
TRAINING AND DEVELOPMENT

HOBBIES & INTERESTS (22337, JACKEE ADAMS)

An employee's hobbies and interests

Hobbies

Interests

SAVE

Notification Detail

- Details about the employee's notifications can be viewed by clicking on **Notification Detail**.

User Permissions

Please see the [User and Access Management](#) section of this chapter for more information.

Appointment

Appointment history

- Use the **left-hand menu** to navigate to **Appointment History** to review the employee's current and previous appointments.
- Use **+APPOINTMENT** to add a new **Primary Appointment** or **Secondary Appointment**.
- Use **+EMPLOYMENT HISTORY** to record previous employment at another company.
- Review the **Start Date in Group** and **Start Date in Company** fields.
- Use the available action buttons at the bottom of the screen to **TRANSFER PERSON**, **TERMINATE PERSON**, or **TRANSFER PERSON TO ANOTHER RULESET** when required.
- Click **CANCEL** to exit without making changes.

The screenshot displays the 'Appointment History' section for Aimee Campbell (10120157), Chief of Operations (COO). The interface includes a left-hand navigation menu with categories like SUMMARY, PROFILE, EXTENDED PROFILE, USER PERMISSIONS, APPOINTMENT, PERFORMANCE MANAGEMENT, TRAINING AND DEVELOPMENT, LABOUR RELATIONS, and AUDIT INFORMATION. The main content area is divided into three sections: 'APPOINTMENT HISTORY AT CURRENT COMPANY', 'SECONDARY APPOINTMENTS', and 'EMPLOYMENT HISTORY AT PREVIOUS COMPANIES'. The 'APPOINTMENT HISTORY AT CURRENT COMPANY' section shows a table with one entry for a Primary Appointment. The 'SECONDARY APPOINTMENTS' and 'EMPLOYMENT HISTORY AT PREVIOUS COMPANIES' sections are currently empty, displaying 'No data available in table'. At the bottom of the screen, there are four action buttons: 'TRANSFER PERSON', 'TERMINATE PERSON', 'TRANSFER PERSON TO ANOTHER RULESET', and 'CANCEL'.

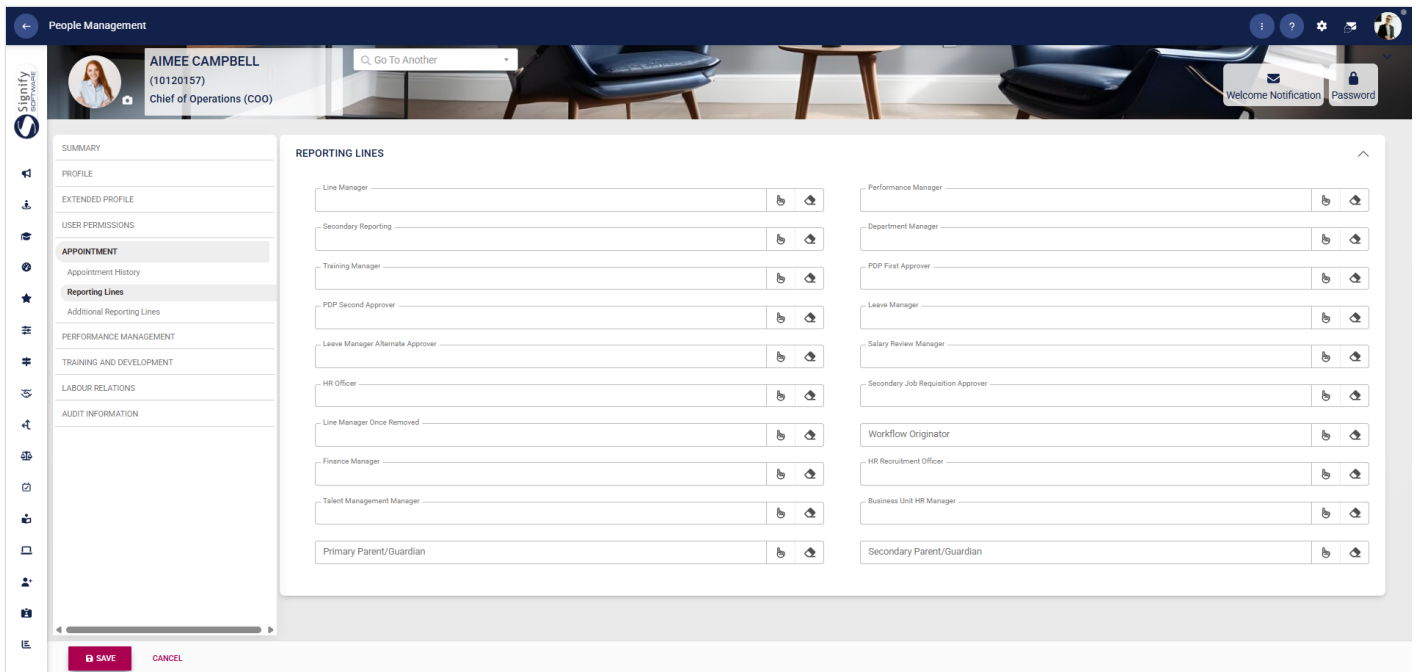
POSITION CODE	POSITION TITLE	LOCATION IN ORGANISATION	TYPE	% ALLOCATION TO THIS ROLE	FROM	TO	REASON FOR ENDING
5a2e7593	Chief of Operations (COO)	Signify Software	Permanent	0	01/01/2018		

POSITION CODE	POSITION TITLE	LOCATION IN ORGANISATION	TYPE	% ALLOCATION TO THIS ROLE	FROM	TO	REASON FOR ENDING
No data available in table							

EMPLOYER	POSITION TITLE	FROM	TO	DURATION
No data available in table				

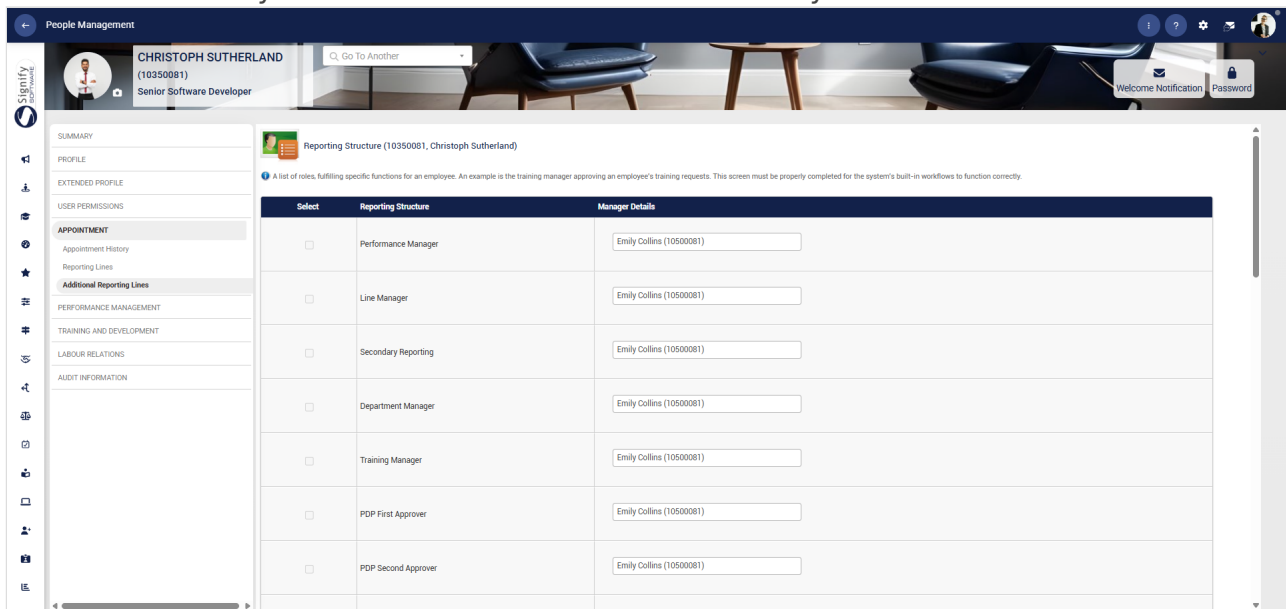
Reporting lines

- Use the **left-hand menu** to navigate to **Reporting Lines**.
- Use the available lookup fields to assign the employee's managers and related reporting roles.
- Complete the relevant fields, such as **Line Manager**, **Secondary Reporting**, **Training Manager**, **PDP Approvers**, **Leave Manager**, **HR Officer**, and other listed roles, as required.
- Use the search or lookup icons beside each field to select the correct person.
- Click **SAVE** when you are finished or **CANCEL** to discard your edits.



Additional reporting lines

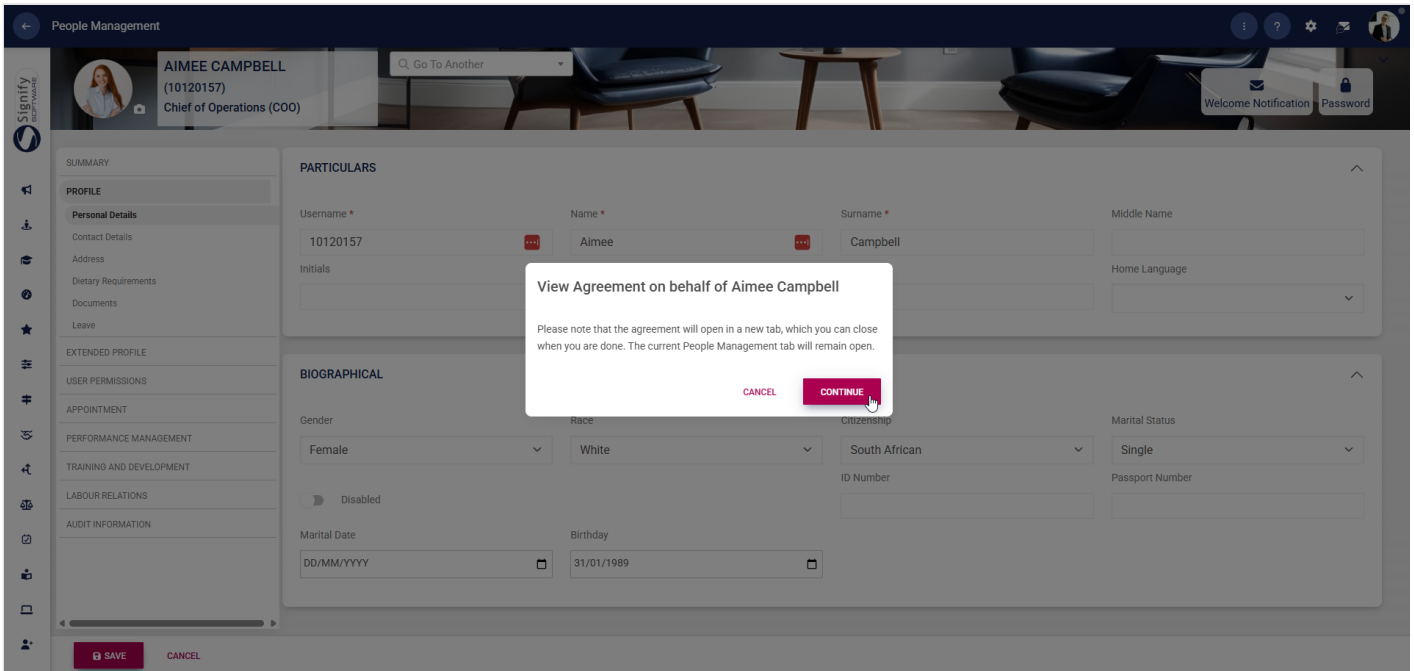
- Use the **left-hand menu** to navigate to **Additional Reporting Lines**.
- Select the required reporting structure from the list.
- Review the available roles, such as **Performance Manager, Line Manager, Department Manager, Training Manager,** and **PDP Approvers**, and assign the relevant manager details for each one.
- This screen supports the system's built-in workflows, so ensure the reporting structure is completed correctly before continuing.
- Click **SAVE** when you are finished or **CANCEL** to discard your edits.



Performance Management

- Use the **left-hand menu** to navigate to **Performance Management**.

- This feature allows you to view the user's performance agreement on their behalf.
- Click **CONTINUE** to go to the **Performance Management** module.



Training and Development

Learning Records

- Use the **left-hand menu** to navigate to **Learning Records** to view and manage the employee's training history.
- Use **+ITEM** to add a new record, selecting from options such as Training, Unit, Programme, or Qualification.
- Use **PRINT** or **IMPORT** to manage records externally.
- Click **RESET ASSESSMENT ATTEMPTS** where applicable to reset training progress.
- Use the view options to switch between **Full View** and **Summary View**.

People Management

AIMEE CAMPBELL (10120157)
Chief of Operations (COO)

Go To Another

Summary

Profile

Extended Profile

User Permissions

Appointment

Performance Management

TRAINING AND DEVELOPMENT

Learning Records

Strengths And Weaknesses

Notes

Professional Membership

Assessment List

PDP

PDP Qualifications

Talent Assessment

Talent Profiles

LABOUR RELATIONS

AUDIT INFORMATION

LEARNING RECORD LIST FOR AIMEE CAMPBELL (10120157)

Search Criteria

Current View

Full View Summary View

+ ITEM PRINT IMPORT RESET ASSESSMENT ATTEMPTS

No training records found for employee.

https://www.signifyhr.co.za/signifyhr_multi6/app/Learning/TrainingRecord/GetTrainingRecordList

Strengths and Weaknesses

- Use the **left-hand menu** to navigate to **Strengths and Weaknesses**, then use the **Strengths** or **Weaknesses** tab to view the relevant records.
- Click **ADD** to create a new entry or **DELETE** to remove an existing one, where applicable.

People Management

AIMEE CAMPBELL (10120157)
Chief of Operations (COO)

Go To Another

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Strengths And Weaknesses

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LABOUR RELATIONS

AUDIT INFORMATION

Strength and Weakness List (10120157, Aimee Campbell)

STRENGTHS WEAKNESSES

Search

SEARCH CLEAR

ADD DELETE

No results found for your current search criteria

Notes

- Use the **left-hand menu** to navigate to **Notes** and use the search field to find an existing note.
- Click **ADD** to record a new note or **DELETE** to remove an existing note, where permitted.

The screenshot displays the 'People Management' interface for user AIMEE CAMPBELL (10120157), Chief of Operations (COO). The left-hand navigation menu includes categories such as SUMMARY, PROFILE, USER PERMISSIONS, APPOINTMENT, PERFORMANCE MANAGEMENT, TRAINING AND DEVELOPMENT, and LABOUR RELATIONS. The 'Notes' section is currently selected. The main content area shows a 'Notes List (10120157, Aimee Campbell)' with a search bar and 'SEARCH' and 'CLEAR' buttons. A red 'ADD' button is visible, and a message states 'No results found for your current search criteria'. The top right of the interface features a 'Welcome Notification' and a 'Password' field.

Professional Membership

- Use the **left-hand menu** to navigate to **Professional Membership** and search for the relevant membership record.
- Click **ADD** to capture a new professional membership or **DELETE** to remove an existing one, where applicable.

The screenshot shows the 'People Management' interface for Aimee Campbell (10120157), Chief of Operations (COO). The left-hand menu is visible, with 'TRAINING AND DEVELOPMENT' selected. Under this menu, 'Professional Membership' is highlighted. The main content area is titled 'Professional Memberships (10120157, Aimee Campbell)'. It features a search bar with a magnifying glass icon, 'SEARCH' and 'CLEAR' buttons, and 'ADD' and 'DELETE' buttons. Below the search bar, it states 'No results found for your current search criteria'.

Assessment List

- Use the **left-hand menu** to navigate to **Assessment List** to review the employee's online assessment information.
- Review the note on the screen carefully, as resetting assessment attempts will completely reset the assessment if the employee is involved in completed or in-progress attempts.

The screenshot shows the 'People Management' interface for Aimee Campbell (10120157), Chief of Operations (COO). The left-hand menu is visible, with 'TRAINING AND DEVELOPMENT' selected. Under this menu, 'Assessment List' is highlighted. The main content area is titled 'Employee Assessments (10120157, Aimee Campbell)'. It features a green banner that says 'Popups are allowed for this site.' Below the banner, there is a note: 'A register of all online assessments that an employee is currently INVOLVED in both completed or in progress. NOTE: Selecting Reset attempt count will completely reset this assessment as if the employee had never attempted it.' Below the note, it states 'No online assessment attempts found for employee.'

PDP

- Use the **left-hand menu** to navigate to **PDP**.
- Search for the appropriate personal development plan using the description, period, and date fields.
- Complete the employment type target section for each relevant year, then click **SAVE** to store your changes.
- Use **ADD** to create a new PDP or **DELETE** to remove one, where permitted.

The screenshot shows the 'People Management' interface for Aimee Campbell (10120157), Chief of Operations (COO). The left-hand menu is expanded to 'TRAINING AND DEVELOPMENT', with 'PDP' selected. The main content area includes a search section for PDPs, an 'Employment Type Target' section with a table for years 2026, 2027, and 2028, and a 'List of Personal Development Plans' section with an 'ADD' button. A warning message states: 'A PDP has not yet been created for this employee. Please create one or contact your PDP Administrator for assistance.'

People Management

AIMEE CAMPBELL
(10120157)
Chief of Operations (COO)

Go To Another

SEARCH CLEAR

Period: 2026

And End Date

Employment Type Target

Academy status level

YEAR	TARGET AND END DATE
2026	
2027	
2028	

SAVE

List of Personal Development Plans

A PDP has not yet been created for this employee. Please create one or contact your PDP Administrator for assistance.

ADD DELETE

Talent Assessment

- Use the **left-hand menu** to navigate to **Talent Assessment**.
- Use the **ADD** button to start a new assessment.
- Use **CLEAR** to clear the current criteria or search results when needed.

The screenshot shows the 'Talent Assessment' page for Aimee Campbell (10120157), Chief of Operations (COO). The left-hand menu is visible, with 'Talent Assessment' selected under the 'TRAINING AND DEVELOPMENT' section. The main content area is titled 'TALENT ASSESSMENT (10120157, AIMEE CAMPBELL)'. It features a blue header with the instruction 'Use this page to conduct Talent Assessments.' Below this, there are two buttons: 'ADD' and 'CLEAR'. A large orange banner at the bottom of the main content area displays the message 'No results found for your current search criteria.'

Talent Profiles

- Use the **left-hand menu** to navigate to **Talent Profiles**.
- Search for the required profile using the search field.
- Click **ADD** to create a new talent profile or **DELETE** to remove an entry, where applicable.

The screenshot shows the 'Talent Profiles' page for Aimee Campbell (10120157), Chief of Operations (COO). The left-hand menu is visible, with 'Talent Profiles' selected under the 'TRAINING AND DEVELOPMENT' section. The main content area is titled 'TALENT PROFILES FOR AIMEE CAMPBELL (10120157)'. It features a search bar with the placeholder text 'Search' and a search icon. Below the search bar, there are two buttons: 'SEARCH' and 'CLEAR'. A large orange banner at the bottom of the main content area displays the message 'No results found for your current search criteria.'

Labour Relations

Complaints

- Use the **left-hand menu** to navigate to **Complaints**.
- Use the **Search** fields to find an existing record by name or date range.
- Click **ADD** to capture a new complaint or **DELETE** to remove an entry, where permitted.

The screenshot displays the 'People Management' interface for Aimee Campbell (10120157), Chief of Operations (COO). The left-hand navigation menu is visible, with 'LABOUR RELATIONS' expanded to show 'Complaints'. The main content area is titled 'Complaints List (10120157, Aimee Campbell)'. It features a search bar with a 'Go To Another' dropdown, and filters for 'Between Start Date' and 'And End Date'. Below the search bar are 'ADD' and 'DELETE' buttons. The message 'No results found for your current search criteria' is displayed below the buttons. The top right of the interface includes a 'Welcome Notification' and a 'Password' field.

Disciplinary Actions

- Use the **left-hand menu** to navigate to **Disciplinary Actions**.
- Review the employee's **Current Transgressions** and **Expired Transgressions**.
- Click **+TRANSGRESSIONS** to add a new disciplinary transgression record.

People Management

AIMEE CAMPBELL
(10120157)
Chief of Operations (COO)

Go To Another

Welcome Notification Password

SUMMARY

PROFILE

EXTENDED PROFILE

USER PERMISSIONS

APPOINTMENT

PERFORMANCE MANAGEMENT

TRAINING AND DEVELOPMENT

LABOUR RELATIONS

Complaints

Disciplinary Actions

Disciplinary Advanced

Dispute

Grievances

AUDIT INFORMATION

CURRENT TRANSGRESSIONS

TITLE	DATE	ACTION OUTCOME	DATE OF ACTION OUTCOME	EXPIRY DATE
No data available in table				

EXPIRED TRANSGRESSIONS

TITLE	DATE	ACTION OUTCOME	DATE OF ACTION OUTCOME	EXPIRY DATE
No data available in table				

+ TRANSGRESSIONS

Disciplinary Advanced

- Use the **left-hand menu** to navigate to **Disciplinary Advanced**.
- Use the search bar to find the required disciplinary record.
- Click **ADD** to create a new disciplinary entry or **DELETE** to remove an entry, where permitted.

People Management

AIMEE CAMPBELL
(10120157)
Chief of Operations (COO)

Go To Another

Welcome Notification Password

SUMMARY

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EXTENDED PROFILE

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TRAINING AND DEVELOPMENT

LABOUR RELATIONS

Complaints

Disciplinary Actions

Disciplinary Advanced

Dispute

Grievances

AUDIT INFORMATION

Disciplinary List (10120157, Aimee Campbell)

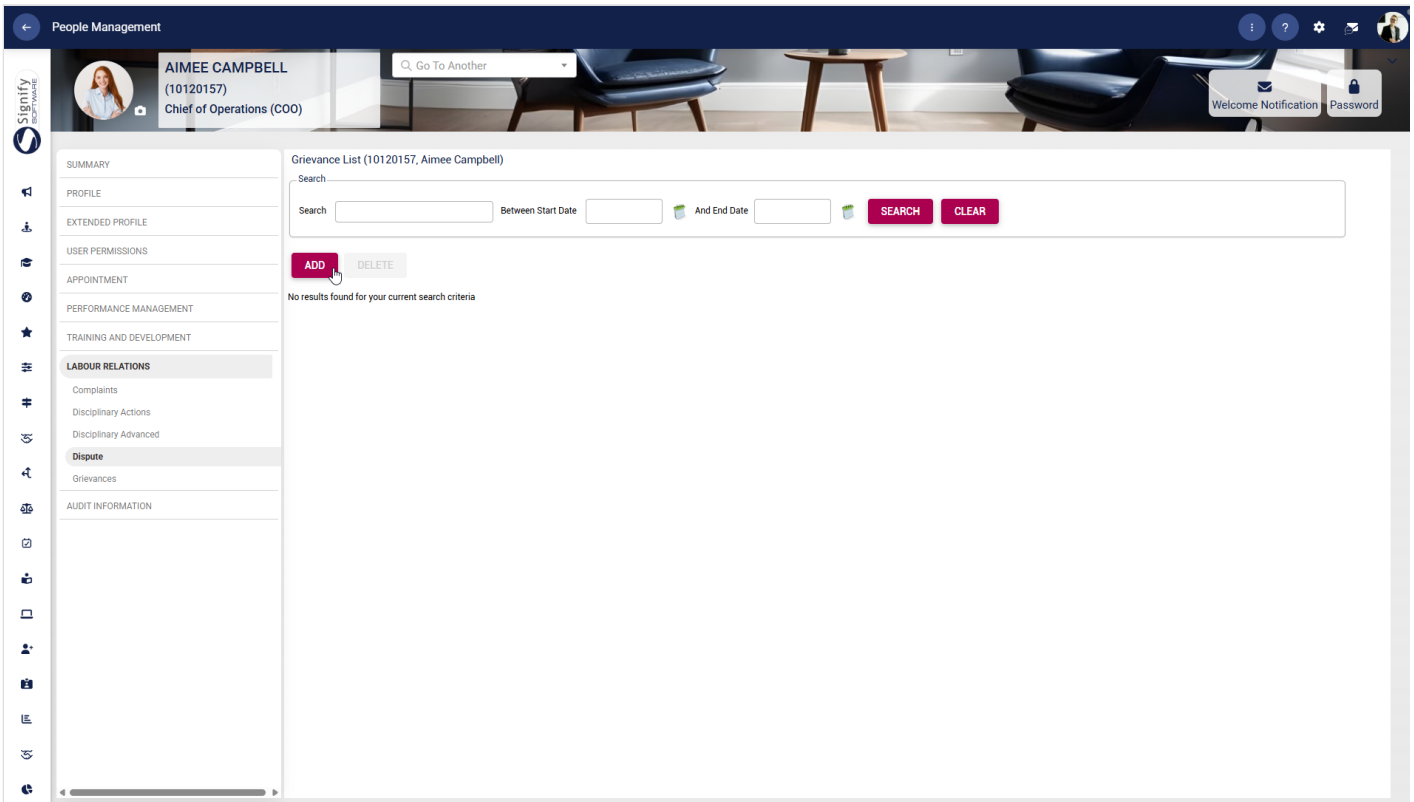
Search SEARCH CLEAR

ADD DELETE

No results found for your current search criteria

Dispute

- Use the **left-hand menu** to navigate to **Dispute**.
- Use the search criteria to locate the relevant dispute record.
- Click **ADD** to create a new dispute record or **DELETE** to remove an existing one, where applicable.



Grievances

- Use the **left-hand menu** to navigate to **Grievances**.
- Use the search fields to find an existing grievance record by name or date range.
- Click **ADD** to capture a new grievance or **DELETE** to remove an entry, where permitted.

People Management

AIMEE CAMPBELL (10120157) Chief of Operations (COO)

Go To Another

Welcome Notification Password

SUMMARY

PROFILE

EXTENDED PROFILE

USER PERMISSIONS

APPOINTMENT

PERFORMANCE MANAGEMENT

TRAINING AND DEVELOPMENT

LABOUR RELATIONS

Complaints

Disciplinary Actions

Disciplinary Advanced

Dispute

Grievances

AUDIT INFORMATION

Grievance List (10120157, Aimee Campbell)

Search

Search Between Start Date And End Date **SEARCH** **CLEAR**

ADD **DELETE**

No results found for your current search criteria

Audit information

Who viewed the data?

Tracks access logs showing who has viewed the employee's data, supporting transparency and compliance.

People Management

AIMEE CAMPBELL (10120157) Chief of Operations (COO)

Go To Another

Welcome Notification Password

SUMMARY

PROFILE

EXTENDED PROFILE

USER PERMISSIONS

APPOINTMENT

PERFORMANCE MANAGEMENT

TRAINING AND DEVELOPMENT

LABOUR RELATIONS

AUDIT INFORMATION

Who Viewed The Data?

Sign-ins

WHO VIEWED THE DATA?

WHAT	WHO	WHEN
Who viewed the data?	Oliver Hendon (oliver.hendon@signify.com)	Thu, 13 Apr 2024
Who viewed the data?	Oliver Hendon (oliver.hendon@signify.com)	Thu, 13 Apr 2024
PDP Qualifications	Oliver Hendon (oliver.hendon@signify.com)	Thu, 13 Apr 2024
Learning Records	Oliver Hendon (oliver.hendon@signify.com)	Thu, 13 Apr 2024
Learning Records	Oliver Hendon (oliver.hendon@signify.com)	Thu, 13 Apr 2024
Complaints	Oliver Hendon (oliver.hendon@signify.com)	Thu, 13 Apr 2024
Complaints	Oliver Hendon (oliver.hendon@signify.com)	Thu, 13 Apr 2024
Who viewed the data?	Oliver Hendon (oliver.hendon@signify.com)	Thu, 13 Apr 2024
Reporting Lines	Oliver Hendon (oliver.hendon@signify.com)	Thu, 13 Apr 2024
Reporting Lines	Oliver Hendon (oliver.hendon@signify.com)	Thu, 13 Apr 2024

Showing 1 to 10 of 158 entries

First Previous **1** 2 3 4 5 ... 16 Next Last

Sign-ins

Monitors the employee's system access history, including login activity for security and audit purposes.

The screenshot displays the 'People Management' interface for user AIMEE CAMPBELL (10120157), Chief of Operations (COO). The left sidebar contains a navigation menu with categories: SUMMARY, PROFILE, EXTENDED PROFILE, USER PERMISSIONS, APPOINTMENT, PERFORMANCE MANAGEMENT, TRAINING AND DEVELOPMENT, LABOUR RELATIONS, and AUDIT INFORMATION. The 'AUDIT INFORMATION' section is expanded to show 'Who Viewed The Data?' and 'Sign-ins'. The main content area features a table with columns: DATE, LOGIN VIA..., IP ADDRESS, BROWSER, PLATFORM, and SUCCESSFUL LOGIN. The table is currently empty, displaying the message 'No data available in table'. The top navigation bar includes a search bar with the text 'Go To Another', a 'Welcome Notification' button, and a 'Password' button.



Revision #6

Created 2025-02-03 14:49:43 UTC by Chanan Stenden

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