SOP: OPENING/UPDATING PERSONNEL FILES

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TABLE OF CONTENTS

AIM

- To open/update personnel files for company employees and view data pertaining to company employees after they have been defined in the system.

Note: Standard Operating Procedures should be used as guidelines for customers (and their consultants) to develop their own operating procedures. As you will note, the following procedures are very specific and customers are strongly advised not to use them without.

SETUPS

1. Enter the Companies form to determine the company in which personnel files are to be maintained (i.e., the company in which the Personnel Management column is flagged). All work in the personnel file must be performed in that company.
2. Define company departments in the Departments form.
3. Define the general positions in the company in the Job Positions form.
4. Record skills (defining skilled workers) in the Skills form.
5. Define certifications in the Certification form.
6. Define Certification Levels.
7. Define employee Awards.
8. Define Learning Institutions.
9. Define Departments and Faculties for learning institutes.
10. Define academic Degrees/Certificates.
11. Define Languages.
12. Define levels of Foreign Language Proficiency.
13. List qualifications in the Qualifications form and ensure that possible values have been defined for each.

PROCEDURE

STAGE ONE: OPENING A PERSONNEL FILE

OPENING A PERSONNEL FILE FOR AN EMPLOYEE THAT IS ALSO A SYSTEM USER

1. Run the Add New User program. Note: This program can only be run by users with system manager privileges.

2. In the input screen, record a User Name, the employee's Full Name, Social Security No. (ID Number in the dual-currency package) and Privilege Grp Leader (to determine the user's system privileges).

   Note: If you are working in a language other than English, record the user's name in English in the Full Name – Lang 2 column.

3. Enter the Personnel File form and retrieve the new user, then proceed to Stage II.

OPENING A PERSONNEL FILE FOR AN EMPLOYEE THAT IS NOT A SYSTEM USER

- Enter the Personnel File form and record a First Name, Last Name and Social Security No./ID Number.

STAGE TWO: RECORDING EMPLOYEE DATA IN THE PERSONNEL FILE

Note: If the employee has been defined as a job candidate, some of the following data may already be recorded in the system.

1. Enter the Personnel File form and retrieve the new user in question.

2. In the General tab, record the employee's Title (e.g., "Mr.", "Ms.") and Gender.

3. In the Position & Team tab, record the employee's Job Title.

4. If this is a multi-company system, specify the Company in which the employee works.

5. If the employee belongs to a team, specify the Leader's EmpID. If the employee is a group leader, flag the Team Leader column.

6. In the Address & Phone tab, specify the employee's home address, telephone numbers and e-mail address.

7. Enter the Personal Details sub-level form.
   - In the Personal Details tab, fill in the relevant data, such as Country of Birth, Birth Date, Marital Status, No. of Children and Previous Last Name, and attach the employee's Resume File.

- In the Spouse tab, fill in the details pertaining to the employee's life partner.
- In the Health Insurance & Pension Fund tab, fill in the relevant details, such as HMO and Pension Fund.

8. Dual-currency users: To record the details of the employee's bank account, enter the parallel Employee's Bank Account sub-level form and specify the Bank Code, Branch and Account.

9. Enter the parallel Info on Position/Company Vehicle sub-level form.
    - In the Details of Position tab, specify the employee's Position, % of Full-Time and Employment Type, as well as the Start Date-Temp, if relevant, and/or Start Date-Job.
    - If the employee is using a company car, click the Vehicle & Driver's License tab and flag the Company Car column. Record the Vehicle Number and the employee's driver's license details.
    - Click the Additional Details tab and record the employee's Lunch Break (mins.).
    - If the employee has ended his/her employment at the company, click the Termination tab and record the End Date. You can also specify a Reason.

10. Enter the parallel Company-Specific Information sub-level form.
    - In the Details tab, specify the employee's Skill, default Project, Department and Work Hr. Part. If the employee works as a sales representative, fill in the Sales Rep Info.
    - In the Data Privileges tab, define the desired system privileges for the employee. For example, flag the Secured Customers Authorization column to allow the employee to view customers that have been flagged in the Secured Customer column in the Customers form.

    Note: This form is specific to the current company. In a multi-company environment, you need to fill in this form in each company in which the employee works.

11. Enter the parallel Log of Positions Held sub-level form and record any previous positions held by the employee. For each position code, specify the employee's Branch, Department, Employment Type and % of Full-Time, and the period of time during which the position was held. Flag the Relocation column if the employee was required to move to a different company for the position, and the Country in question. You can also record an appropriate Remark.

12. Enter the parallel Office Hours sub-level form and record the days of the week the employee works, and the Start and End times for each day.

13. In the parallel Calendar of Employee Absences sub-level form, you can record and view the employee's absences and reasons for absence.

14. In the parallel Awards to Employee sub-level form, you can record the details of any academic or professional awards received by the employee.

15. Enter the parallel Certification sub-level form and record the employee's certifications and levels of certification.

16. In the parallel Courses of Study sub-level form, you can view any courses in which the employee participated. These data are not updatable and are taken from the Participants in Course sub-level of the Courses of Study form.

17. In the parallel References sub-level form, you can record the details of the employee's references.

18. In the parallel Professional Experience sub-level form, you can record each Company/Institution at which the employee previously worked, the Job Title, From Date and to Date and an appropriate Remark.

19. To record the employee's qualifications, enter the parallel Qualifications sub-level form. For each qualification, specify the Qualification Code and assign the most appropriate Value describing the employee's level of competence.

20. Enter the parallel Education sub-level form and record the relevant details, such as Instit. Code, Name of Dept/Faculty and Degree/Certif. Code.

21. In the parallel Foreign Languages sub-level form, record the languages in which the employee is proficient, together with the appropriate levels of proficiency in reading, writing and speech.

22. Enter the parallel Employee's Children sub-level form and record the relevant details.

23. Enter the parallel Medical Tests sub-level form and record the details of any medical tests performed on the employee.

24. You can record any general remarks regarding the employee in the parallel Remarks sub-level form.

25. You can attach any relevant documents or other files (e.g., photos) to the personnel file in the parallel Attachments sub-level form.

26. In the parallel Employee's Relatives sub-level form, you can record details about family relations.

STAGE THREE: SETTING SYSTEM DEFINITIONS FOR EMPLOYEES THAT ARE USERS

1. Click the Definitions tab in the Personnel File form.

2. If the employee is a technician or other service provider, flag the Service Provider column. You can also designate specific part families which the employee is qualified to service:
    - Enter the Company-Specific Information sub-level form and flag the Service for Fams Only column.
    - Enter the Families Serviced by Technician sub-level form to record the relevant part families.

3. If the employee is a business partner, flag the Partner column in the upper-level form.

4. If the employee is a company instructor, flag the Instructor column.

5. Enter the Users form and retrieve the user in question.

6. To allow the user to receive internal mail at the defined external e-mail address, select one of the following values in the Redirect E-mail column:
   - B – To receive mail at both internal and external addresses.
   - E – To only receive mail at the external address.
7. Click the Permissions tab. In this tab you can define various system permissions for the user, for example, whether the user is permitted to create form and menu designs, define business rules or synchronize with MS-Outlook.

Note: You can also define a user as inactive, in which case that user cannot work in the system. An inactive user is distinguished from an inactive employee in that the latter has ceased to work in your company (see Stage VII: Recording Termination of Employment). To define a user as inactive, flag the Inactive User column in the Users form.

STAGE FOUR: RECORDING A NEW JOB FOR THE EMPLOYEE

1. Enter the Personnel File form and retrieve the desired employee.

2. Select Copy Position to the Employee's Log from the list of Direct Activations. This program copies the details of the employee's previous position to the Log of Positions Held sub-level form.

3. Update the data in the personnel file and its sub-levels, as needed.

STAGE FIVE: PERFORMING EMPLOYEE EVALUATIONS

- See Stage III in the standard operating procedures for Processing Job Candidates

STAGE SIX: RECORDING THE EMPLOYEES CANDIDACY FOR ANOTHER JOB IN THE COMPANY

1. Enter the Personnel File form and retrieve the desired employee.

2. In the General tab, change the Status of the employee to a status flagged for the In Applicant Pool attribute. Note: You can enter the Statuses for Employees form to find an appropriate status.

3. Enter the Qualifications sub-level form and make sure all the employee's qualifications are recorded.

4. Enter the Jobs form and retrieve the relevant Job No.

5. Enter the Qualified Applicants for Job sub-level form. If the employee's qualifications are appropriate to the job's requirements, the employee will appear in this form. Flag the Add to Applic. List column. When you leave this form, the employee will appear in the parallel List of Applicants sub-level form. Note: You can also record the employee manually in the Qualified Applicants for Job sub-level form.

6.

STAGE SEVEN: RECORDING TERMINATION OF EMPLOYMENT

1. Enter the Personnel File form and retrieve the desired employee.

2. Enter the Info on Position/Company Vehicle sub-level form, click the Termination tab and specify the End Date of the employee's job.

3. Return to the upper-level form and change the employee's Status to "Inactive" in the General tab. The Inactive column is flagged automatically.

RESULT

The employee is considered inactive. If the employee was defined as a system user, that user is also inactive and the employee cannot enter the system. The employee's user name continues to appear in the List of Users form, but will not appear in user Choose lists.