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RAMCO AVIATION SOLUTION

VERSION 5.8

USER GUIDE

HRMS

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The documentation has been provided for the entire Aviation solution, although only a part of the entire solution may be deployed at the customer site, in accordance with the license agreement between the customer and **Ramco Systems Limited**. Therefore, the documentation made available to the customer may refer to features that are not present in the solution purchased / deployed at the customer site.

ABOUT THIS MANUAL

This manual briefly describes the basic processes and functions in Ramco Aviation Solution.

WHO SHOULD READ THIS MANUAL

This manual is intended for users who are managing the Aviation industry processes and are new to Ramco AviationSolution. This manual assumes that the user is familiar with the Aviation Industry nomenclatures and systems based software.

HOW TO USE THIS MANUAL

Ramco Aviation Solution provides extensive Online Help that contains detailed instructions on how to use the application. Users are suggested to use this manual for specific references, along with the Online Help. This manual contains enough information to help the users perform the basic tasks and points toward the Online Help for more detailed information.

HOW THIS MANUAL IS ORGANIZED

The User Guide is divided into 4 chapters and index. Given below is a brief run-through of what each chapter consists of.

Chapter 1 provides an overview of **HRMS** business process. The sub processes are explained in the remaining chapters.

Chapter 2 focuses on the **HR Setup** sub process.

Chapter 3 focuses on the **Employee Setup** sub process.

Chapter 4 dwells on the **Employment Information Management** sub process.

The Index offers a quick reference to selected words used in the manual.

DOCUMENT CONVENTIONS

- The data entry has been explained taking into account the “Create” business activity. Specific references (if any) to any other business activity such as “Modify” and “View” are given as “Note” at the appropriate places.
- **Boldface** is used to denote commands and user interface labels.

  Example: Enter **Company Code** and click the **Get Details** pushbutton.
- Italics used for references.

  Example: *See Figure 1.1.*
- The icon is used for Notes, to convey additional information.

REFERENCE DOCUMENTATION

This User Guide is part of the documentation set that comes with Ramco Aviation Solution.

The documentation is generally provided in two forms:

- The Documentation CD in Adobe® Systems’ Portable Document Format (PDF).
- Context-sensitive Online Help information accessible from the application screens.

WHOM TO CONTACT FOR QUERIES

Please locate the nearest office for your geographical area from www.ramco.com for assistance.

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INTRODUCTION

Every organization is built on human resources. These resources need to identified, recorded, organized and utilized effectively, to aid the organizing in accomplishing the chosen goals. The **Human Resource Management** business process addresses this need, by effecting two sub processes: **Employee Setup** and **Employment Information Management**.

The **HR Setup** sub process basically involves creating and maintaining each job, position and grade within an organization. However this chapter focusses on defining quick codes across business processes in HRMS.

The **Employee Setup** sub process enables creating basic employee information and maintains employee personal details such as contact information, family details, qualification, certificates, skills and licenses.

The **Employment Information Management** sub process will cover employment assignments, positions, jobs, etc., to provide a well-rounded professional profile of the employee and in-depth understanding of the role that the employee performs with the organization.

HR SETUP

The **HR Setup** sub process focusses on maintaining quick codes across business processes in HRMS. Any set of related activities such as, appraisal or adding a Job Requirement, which is carried out by an organization, is a business process. Quick codes need to be defined across business processes to satisfy an organization's specific needs.

HR General Information business component allows creating or modifying quick codes defined across business processes. You can also set permissions for the users to add, edit or delete the quick code values pertaining to various business processes.

2.1 MAINTAINING QUICK CODES

Quick codes act as additional qualifiers for a business entity or document. Quick codes can assume user provided values, which can be used to categorize or group an entity or document. You can define quick codes across business processes.

For carrying out a business process, you may need to supply certain items of information in the data entry fields. For instance, while recording personal information of an employee, you may need to supply the hobby type of the employee. Hobby Type, in this instance, is a process variable. A process variable can comprise a set of predefined values. For example, the process variable 'Hobby Type' can consist of predefined values such as, Cultural, Literary and Sports. These values are quick codes.

Whenever you need to enter the Hobby Type for the employee during the business process, these values are automatically listed. You can just choose a value instead of entering the data, thus saving time and effort. In short, quick codes make data entry easier.

The **Maintain Quick Codes** activity enables user to define quick codes across business processes in HRMS transactions.

1. Select the **Maintain Quick Codes** activity under the **HR General Information** business component. The **Maintain Quick Codes** page appears. *See Figure 2.1.*

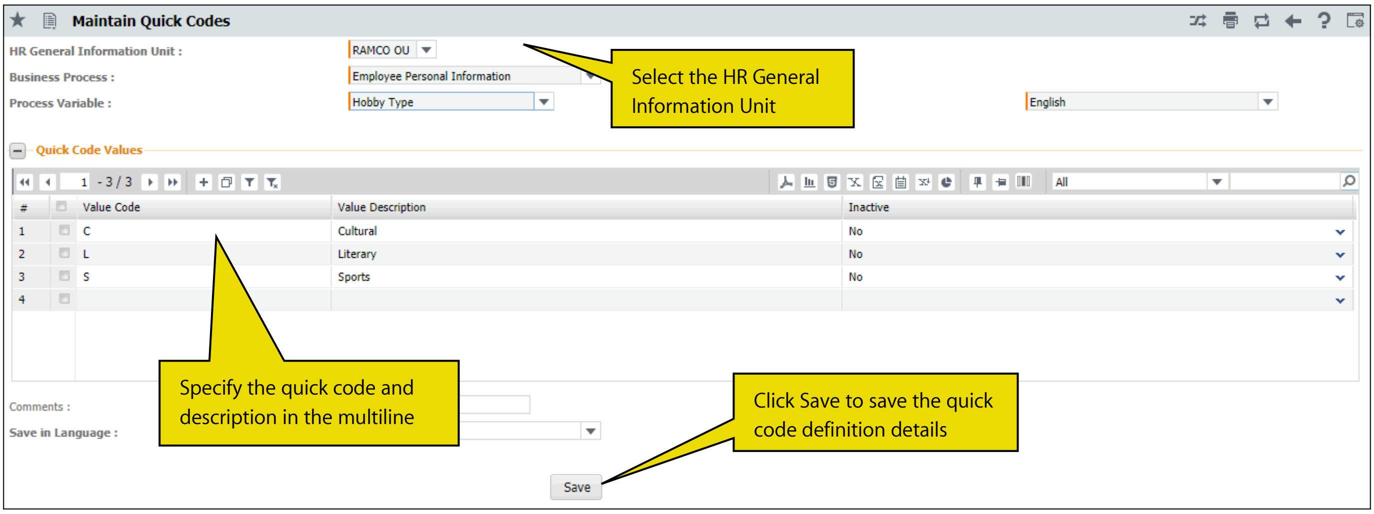

Figure 2.1 Maintaining quick codes

2. Use the **HR General Information Unit** drop-down list box to specify the organization unit in which the **HR General Information** business component is deployed.

3. Select the required **Business Process** from the drop-down list box. A business process is an activity that records any aspect of information relating to the employee or the organization. For example, "Appraisal Setup", "Employee Personal Information". The drop-down list box lists all the business processes applicable to the selected **HR General Information Unit** and for which user permission is defined in the **Set User Permissions for Quick Codes** activity.

4. Select the **Process Variable** which is any item of information that is used in a business process. For example, Hobby Type is one of the items of information that is recorded while recording personal information of an employee. You can select the Hobby Type for which you want to add or edit quick codes, under the business Process "Employee Personal Information". The system retrieves the quick codes corresponding to the process variable selected, in the multiline.

5. Select the **Language** in which you require to edit the details. The system displays the language in which the login user logged in. This refers to the language you selected in the login screen, to access this activity.

In the Quick Code Values multiline,

6. Enter or modify the **Value Code** identifying quick code corresponding to the process variable.
7. Enter or modify the Value Description identifying the quick code description. The system lists the values 'Cultural', 'Literary' and 'Sports' for the process variable 'Hobby Type'.
8. Use the Inactive drop-down list-box and select 'Yes' or 'No' to indicate whether the quick code must be active or inactive.
9. Enter any **Comments** related to the details specified below the multiline.
10. Use the **Save in Language** drop-down list and select the language in which you wish to save the details.
11. Click the **Save** pushbutton to save the quick code details entered / modified.

2.2 SETTING USER PERMISSION FOR QUICK CODES

Through this activity, you can set permissions for the users to add, edit or delete the quick code values pertaining to various business processes. The need for setting user specific permissions for quick codes arises since all users may not be associated with all business processes either in number or in degree. Consequently, you can select a user and set permissions for the business processes with which he/she is associated.

1. Select the **Set User Permissions for Quick Codes** activity under the **HR General Information** business component. The **Select User for Quick Code Permission** page appears.

2. Enter the User Name and click the **Set User Permissions for Quick Codes** link provided alongside. Alternatively you can specify the Search Criteria and click the hyperlinked **User Name** in the multiline. The **Set User Permissions for Quick Codes** page appears. *See Figure 2.2.*

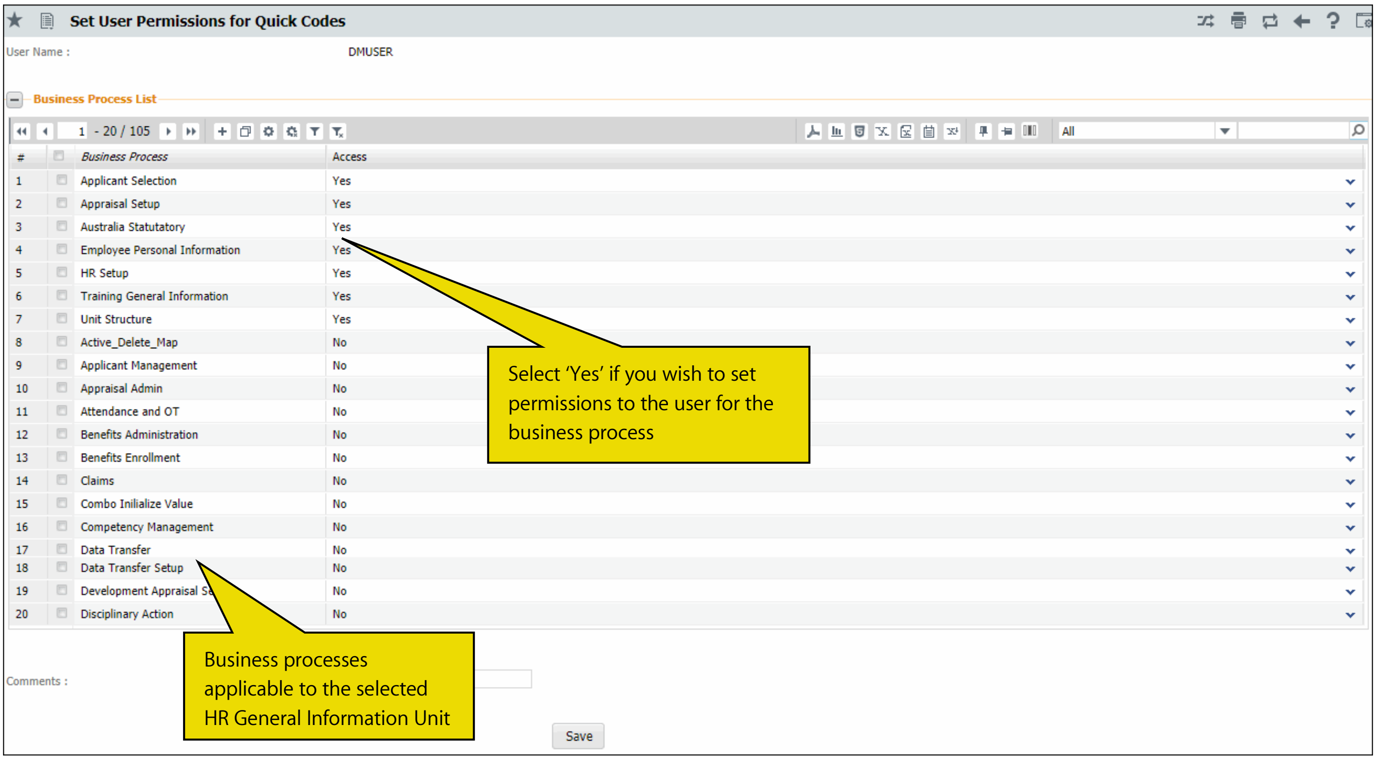

Figure 2.2 Setting user permission for quick codes

3. The system displays the User Name in the header.

4. In the Business Process List multiline, the system lists all the business processes applicable to the selected HR General Information unit. Select "Yes" or "No" from the Access drop-down list box to indicate whether you want to set permissions to the user for the corresponding business process or not.

5. Enter any **Comments**, pertaining to the details entered.

6. Click the Save pushbutton to save the details entered / modified.

EMPLOYEE SETUP

The **Employee Setup** sub process enables setting employee code parameters and creating employee information required to induct, transfer, separate and rehire the employee. Apart from the basic setup information, the sub process also allows to create, and maintain employee personal details.

Employee Code Setup business component allows you to set employee code parameters, which in turn govern the employee code generation method, length of employee code, etc. User employee mapping can also be done in this component.

Employee Personal Information business component focuses on creating employee information required to induct, transfer, separate and rehire the employee. The business component also allows facilitates to create and maintain employee personal details such as contact information, family details, qualification, certificates, skills and licenses he or she possesses. These inputs are vital for supervisors to decide the most suitable jobs to which employees must be assigned.

3.1 SETTING EMPLOYEE CODE PARAMETERS

The employee code parameters are applicable only to the organization units whose **Employee Personal Information** component interacts with that particular instance of the **Employee Code Setup** component. These parameters aids in governing the employee code generation method. These In case of employee transfers or consolidation between two organization units, the employee code must not change. So the **Employee Code Setup** component must be deployed at a level higher than the level in which the employees are created or defined. In addition, you can also modify the values set previously for some of the parameters. The values of some parameters cannot be changed once used down the line.

1. Select the Set Employee Code Parameters activity under the Employee Code Setup business component. The Set Employee Code Parameters page appears. *See Figure 3.1.*

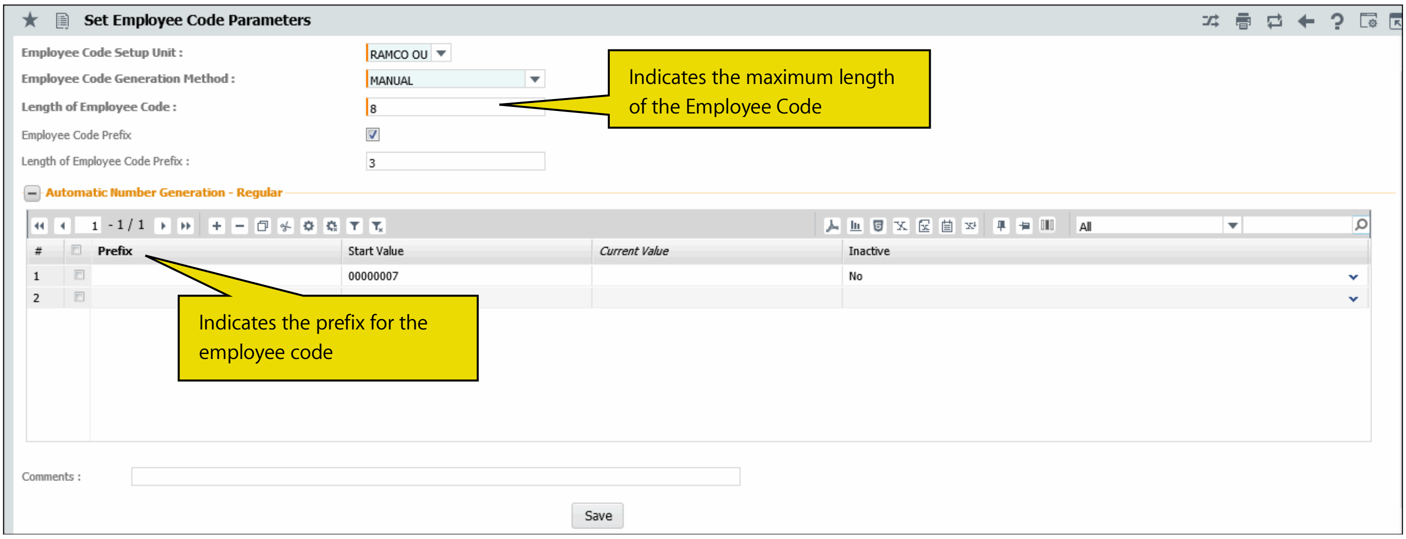

Figure 3.1 Setting employee code parameters

2. Use the Employee Code Setup Unit drop-down list box to specify the organization unit in which the Employee Code Setup business component is deployed.

3. Use the Employee Code Generation Method drop-down list box to indicate whether the employee code generation is to be set as either ‘Automatic’ or ‘Manual’.

   Note: If the generation method is set to automatic, then the system increments the current value of the employee code by one and assigns it to the new employee being created. For example, if the current value is 0007, the system increments it by one and assigns 0008 to the new employee file

   If the generation method is set to manual, the user has to enter the numeric value of the employee code manually.

4. Enter the **Length of Employee Code** to specify the maximum length of the Employee Code.

5. Select the **Employee Code Prefix** checkbox to indicate whether the Employee Code must have a prefix.

6. Enter the **Length of Employee Code Prefix** field.

7. In the **Automatic Number Generation - Regular** multiline, enter the **Prefix** and **Start Value** fields.

8. Use the **Inactive** drop-down list-box and select ‘Yes’ or ‘No’.

   - Yes, indicates that the prefix is not activated to function.
   - No, indicates that the prefix is in active status and is available for use.

9. Click the **Save** pushbutton to save the employee code parameters specified.

3.2 CREATING EMPLOYEE FILE

An employee file is a repository for recording information pertaining to the various personal aspects of the employee. A unique identity is created for the employee file by recording the basic personal and identification details of the employee. These details can be edited or viewed at a later point of time.

Creating an employee file involves specifying,

- The organization unit in which the employee code parameters are set for the login employment unit.
- The employment identity details of the employee.
- The personal identity details of the employee.

1. Select the **Create Employee File** activity under the **Employee Personal Information** business component. The **Create Employee File** page appears. *See Figure 3.2.*

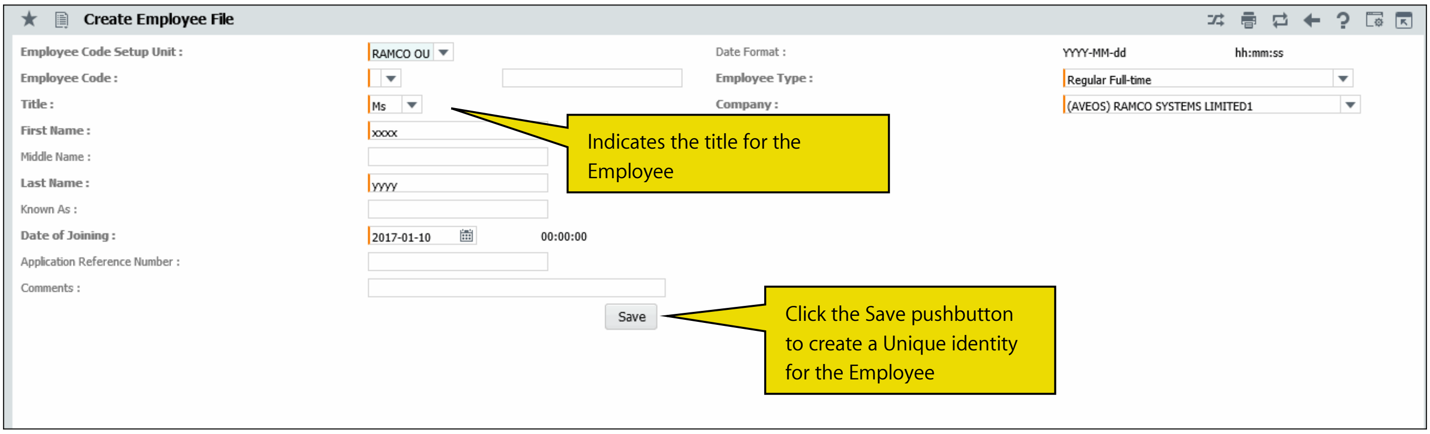

Figure 3.2 Create Employee File

2. Use the Employee Code Setup Unit drop-down list box to select the organization unit in which employee code parameters are defined for the login organization unit.
3. Use the Employee Code drop-down list box to select the unique alphanumeric code identifying the employee. The employee code can have an alphabetic prefix and a numeric value based on how the employee code parameters are set in the system parameters. Select the prefix of the Employee Code in the drop-down list box and enter the numeric value of the code in the field beside the drop-down list box.
4. Use the Employee Type drop-down list box to specify the type of the employee's job which indicates whether the employee is a regular employee, hired on contract basis for a specified period, or is a consultant etc. The system lists the employee type values applicable to the selected Employee Code Setup Unit.
5. Use the Title drop-down list box to specify the title of the employee. For example, you can select the options "Mr", "Ms", "Dr" as applicable.
6. Use the Company drop-down list box to specify the name of the company to which the employee belongs. The system lists the names of the companies whose personal information components are interacting with the selected Employee Code Setup Unit.
7. Enter the First Name, Last Name and Date of Joining of the employee.
8. Click the Save pushbutton to create the file for the employee and submit the record for authorization.

3.3 RECORDING PERSONAL INFORMATION

Personal information refers to the personal and employment details of the employee. The **Record Personal Information** activity allows recording the information pertaining to any of the personal information areas like Contact Information and Work Experience Information. You can record following personal details of the employee:

- The complete name of the employee and the name by which he/she is usually known .
- The employee's date of birth, gender, ethnicity and marital status.
- The country and state to which the employee belongs.
- The date and time details pertaining to the hire, confirmation, rehire or separation of the employee.
- The emergency contact information of the employee.

1. Select the **Record Personal Information** activity under the **Employee Personal Information** business component. The **Select Employee to Record Personal Information** page appears.
2. Enter the search criteria to search for the employee and click the **Search** pushbutton.
3. Select the hyperlinked Employee Code, to record the personal Information. You can also directly specify the **Employee Code** and click the **Record Personal Information** link provided alongside. The **Record Personal Information** page appears. *See Figure 3.3.*

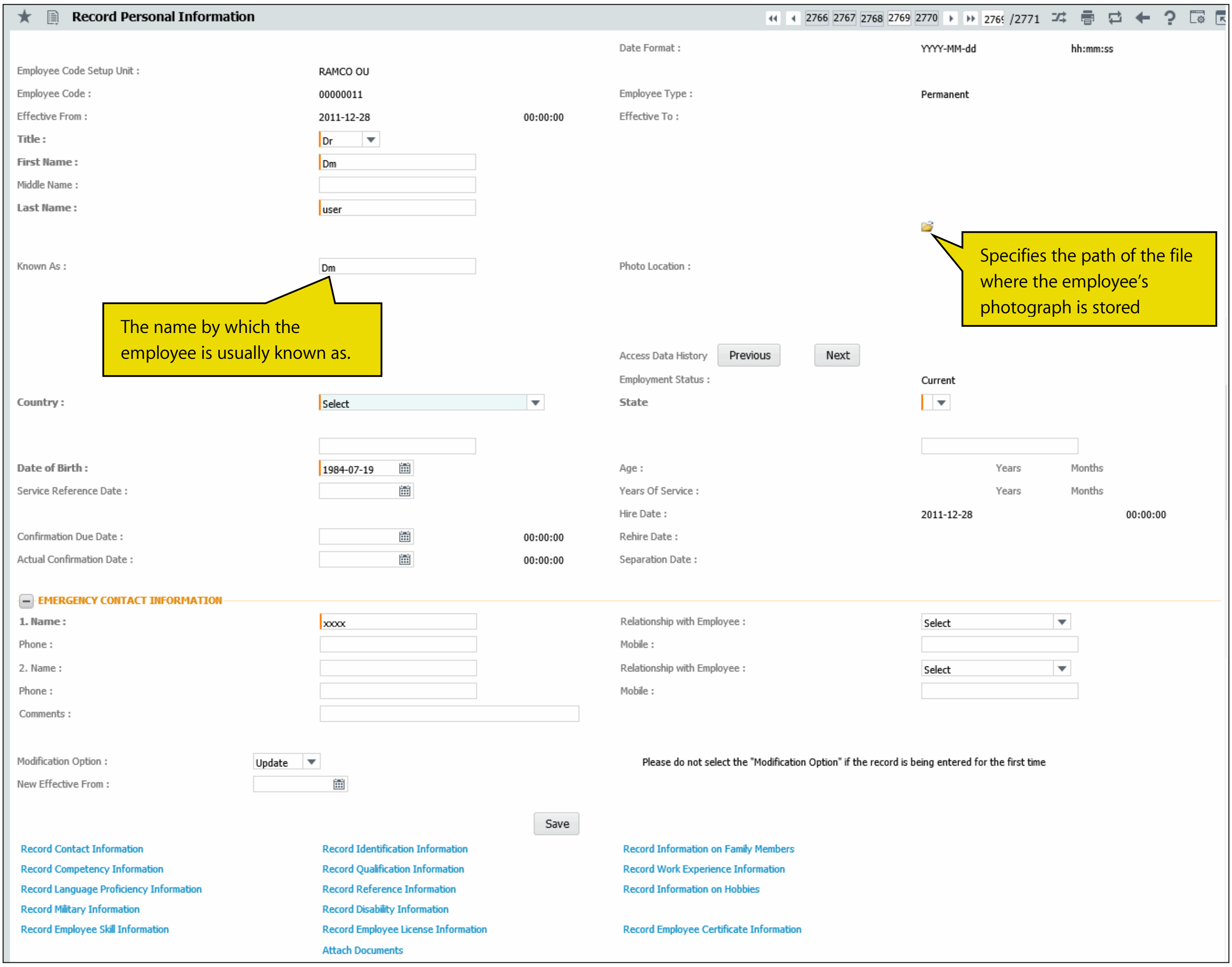

Figure 3.3 Record Personal Information

4. Use the **Title** drop-down list box to specify the title for the name of the employee. For example: "Mr", "Ms" and "Dr".

5. Enter the **First Name** and **Last Name** fields.
6. Enter the **Country**, **State** and **Date of Birth** of the employee.
7. Enter the **Service Reference Date**, **Confirmation Due Date** and **Actual Confirmation Date** of the employee.

In the **Emergency Contact Information** group box,

8. Enter the names of the first and second contact person in the **Name** fields.
9. Use the **Relationship with Employee** drop-down list box to specify the relationship of the contact person.

Note: It is mandatory to provide at least one emergency contact information.

Modifying the Record

10. Use the **Modification Option** drop-down list box to select the required modification option. The system displays the following options: Correct, New and Update.
11. Enter the date and time from which a new version of the record must be created with the modifications you made in the **New Effective From** field.
12. Click the **Save** pushbutton to save the details entered.

Additional Information for Employee Personal Information

- Select the **Record Contact Information** link to record or modify the contact information details of an employee.
- Select the **Record Identification Information** link to add or modify the identification information of an employee.
- Select the **Record Information on Family Members** link to record or modify the information pertaining to the family members of an employee.
- Select the **Record Competency Information** link by which HR user can record the details pertaining to the competencies possessed by the employee.
- Select the **Record Qualification Information** link to record the academic qualifications of the employee.
- Select the **Record Work Experience Information** link to record the work experience information of an employee.
- Select the **Record Language Proficiency Information** link to record or modify the language proficiency information of an employee.
- Select the **Record Reference Information** link to record or modify the reference information of an employee.
- Select the **Record Information on Hobbies** link to record the hobbies of the employee.
- Select the **Record Military Information** link to add or modify the military service details of the employee.
- Select the **Record Disability Information** link to add or modify the disability information of an employee.
- Select the **Record Employee Skill Information** link to record the skill details of the employee.
- Select the **Record Employee License Information** link to record the license information of the employee.
- Select the **Record Employee Certificate Information** link to record the certification details of the employee.
- Select the **Attach Documents** link to attach any associated documents.

3.4 RECORDING CONTACT INFORMATION

You can record / modify the contact details of an employee, such as Contact Type, complete address of the employee, phone, fax, email and web page details, etc. To record contact information, you must first specify the contact type which indicates whether the contact information being recorded pertains to the permanent address of the employee, the residential address or the address at which you can contact the employee on a holiday

1. Select the **Record Contact Information** activity under the **Employee Personal Information** business component. **The Select Employee to Record Contact Information** page appears.
2. Provide filter criteria to search for the employee and click the **Search** pushbutton.
3. Select the hyperlinked Employee Code in the multiline. The **View Available Contact Types** page appears.
4. Select the required **Contact Type** and select the **Create Contact Information** hyperlink at the bottom of the page. **Record Contact Information.** *See Figure 3.4.*

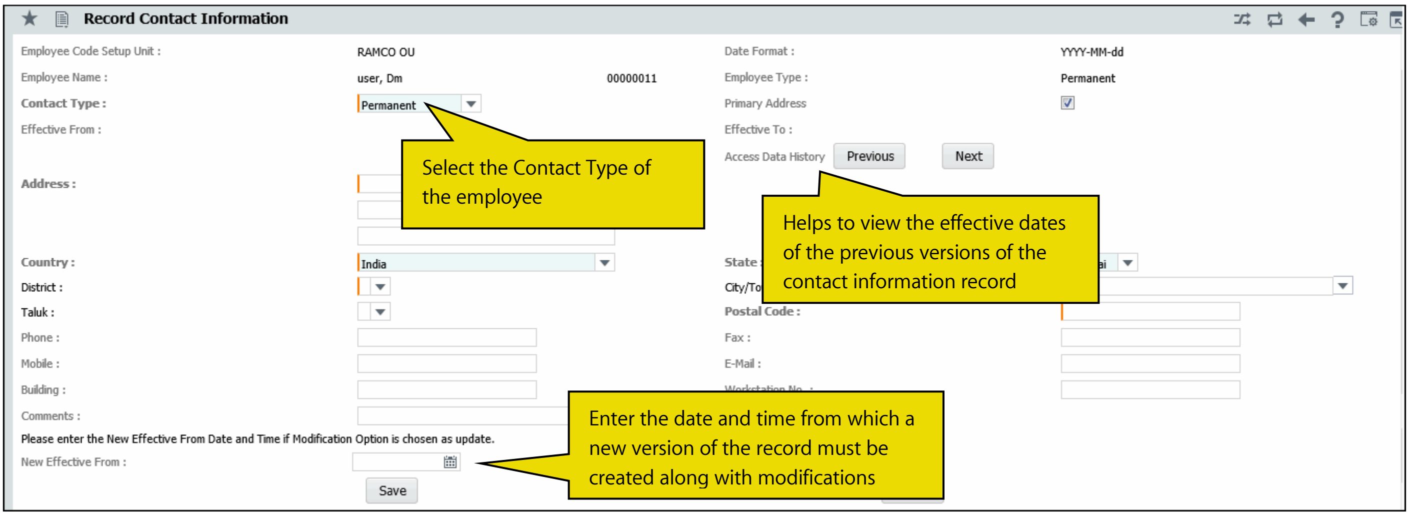

Figure 3.4 Record Contact Information

5. Use the **Contact Type** drop-down list box to specify the contact type of the selected employee, such as Communication, Holiday, Permanent or Residential. If you specify the contact type as “Holiday”, it indicates that the contact information being entered pertains to the contact address at which the employee could be contacted on a holiday.
6. Select the **Primary Address** checkbox to indicate if the address entered for the selected contact type is the primary address of the employee. Leave the check box blank, if the address is not the primary address of the employee.
7. Click the **Previous** pushbutton to view the effective dates of the previous version of the record.
8. Click the **Next** pushbutton to view the effective dates of the next version of the record.
9. Enter the **Address** at which the employee could be contacted under the specified contact information type.
10. Use the drop-down list boxes and select the **Country**, **State**, **District**, **City/Town** and **Taluk** to which the employee belongs.
11. Enter the **Postal Code** field to specify the zip number of the city selected.
12. Use the **Modification Option** drop-down list box to select the required modification option as either “Correct” or “Update”.
13. Click the **Save** pushbutton to save the details entered.
14. Click the **Delete** pushbutton to delete the contact information record.

3.5 RECORDING IDENTIFICATION INFORMATION

Identification information refers to the details of the type of document which is used as identification of an employee. For example, the passport details or the driving license details of the employee can be used as the documented identification for the employee. The **Record Identifying Information** activity allows specifying the identification type, and other details of the document such as, registered number of the document, identity of the authority who issued the document, the place and the date where it was issued and the period for which it is effective. You can also enter your remarks pertaining to the information specified.

1. Select the **Record Identification Information** activity under the **Employee Personal Information** business component. The **Select Employee to Record Identification Information** page appears.
2. Enter Search Criteria to search for the employee, and click the **Search** pushbutton.
3. Select the hyperlinked Employee Code or directly enter the Employee Code and click the link provided alongside. The **Record Identification Information** page appears. *See Figure 3.5.*

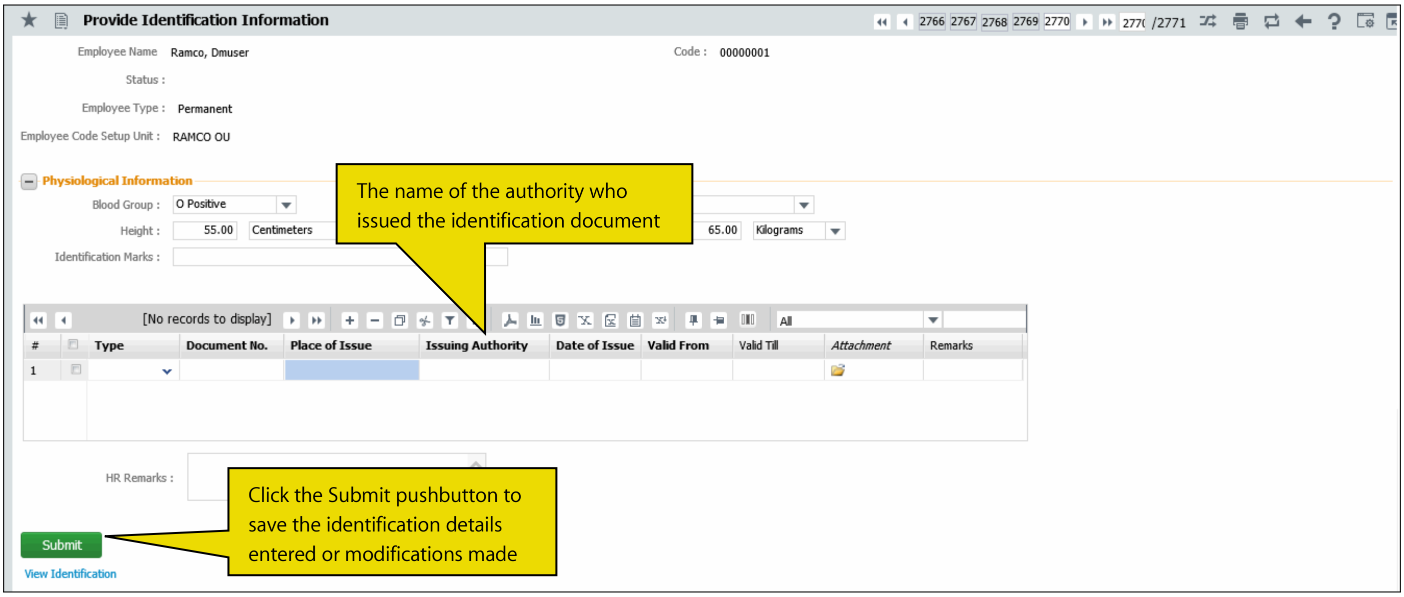

Figure 3.5 Record Identification Information

In the Physiological Information group box,

4. Specify the details of the employee like Blood Group, Smoker, Height and Weight using appropriate drop-down list boxes.
5. Use the Type drop-down list box in the multiline to specify the type of document which is used to record identification information, such as passport, driving license etc.
6. Enter the unique number of the document specified as identification type in the Document No. field.
7. Enter the Place of Issue, Issuing Authority, Date of Issue and Valid From of the Identification Document.
8. Click the **Submit** pushbutton to save the identification information of the employee.
9. Select the **View Identification** link to view the identification information record.

3.6 RECORD FAMILY DETAILS

The **Record Information on Family Members** activity enables to record or modify the information pertaining to the family members of an employee. The family member information constitutes the complete details with regard to the family members of the employee such as, spouse, parents, and children. The details that are recorded or modified are,

- The code of the family member
- The complete name, date of birth, gender and occupation of the family member, and his/her marital status.
- The family member's relationship with the employee and the details whether the relationship is current.

If the relationship is not current, you are to indicate the end date of the relationship and the reason for which the relationships has been terminated, for example, death, and divorce. You can also indicate if the family member is a dependent of the employee or otherwise

1. Select the **Record Information on Family Members** activity under the **Employee Personal Information** business component. Select **Employee-Record Family Member Information** page appears.
2. Provide filter criteria to search for the employee and click the **Search** pushbutton.
3. Select the hyperlinked Employee Code. You can also directly enter the employee code and click the link provided alongside. The **Record Information on Family Members** page appears. *See Figure 3.6.*

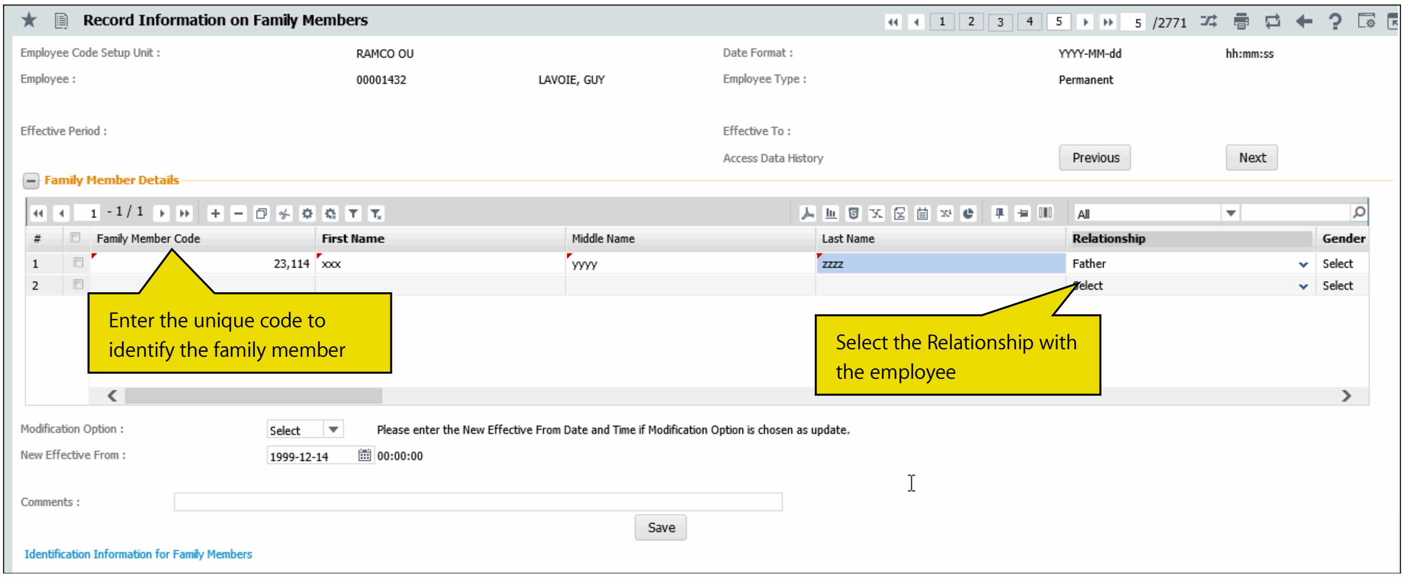

Figure 3.6 Recording family details

In the **Family Member Details** multiline,

4. Enter the **First Name**, **Middle Name** and the **Last Name** fields.
5. Use the **Relationship** drop-down list box and select the family member- employee relationship.
6. Use the **Gender** drop-down list box and select the gender of the family member, whether male or female.
7. Enter the **Date of Birth** field.
8. Use the **Dependent** drop-down list box and select whether the family member is a dependent of the employee or otherwise.
9. Use the **Occupation Status** drop-down list box and select the occupation status of the family member.
10. Enter the **Occupation** of the family member.
11. Use the drop-down list box and select the **Marital Status**, **Air Ticket Eligible** and **Disability** fields.
12. Enter the **Employee Code**, **Citizen Identification Number** and **CPF** fields.
13. Use the **Is Relationship Current** drop-down list box and select the status of the family member-employee

relationship.

14. Enter the **Relationship Start Date** and **Relationship End Date** fields.

    Note: For example, in the event of the birth/death of the family member, the date on which the family member born/died respectively can be specified.

15. Use the **Reason** drop-down list box to specify the reason due to which the family member-employee relationship became non-current.

16. Enter the **Remarks**, **Passport Start Date** and **Passport Expiry Date** fields.

17. Use the **Modification Option** drop-down list box to specify the required modification option. The system displays the following values: Correct, New and Update.

18. Enter the date and time from which a new version of the record must be created with the modifications made in the **New Effective From** field.

19. Click the **Save** pushbutton to save the information on family members of the employee.

20. Select the **Identification Information for family Members** link for recording the identification details for family members of the employee.

3.7 RECORDING LICENSE INFORMATION

The license information pertaining to the employee can be recorded using the **Record License Information** activity. The details of the License such License #, License Category, Issuing Authority, Status and validity of the license can be recorded using this activity.

1. Select the **Record Employee License Information** link in the **Record Personal Information** page. The **Record Employee License Information** page appears. *See Figure 3.7.*

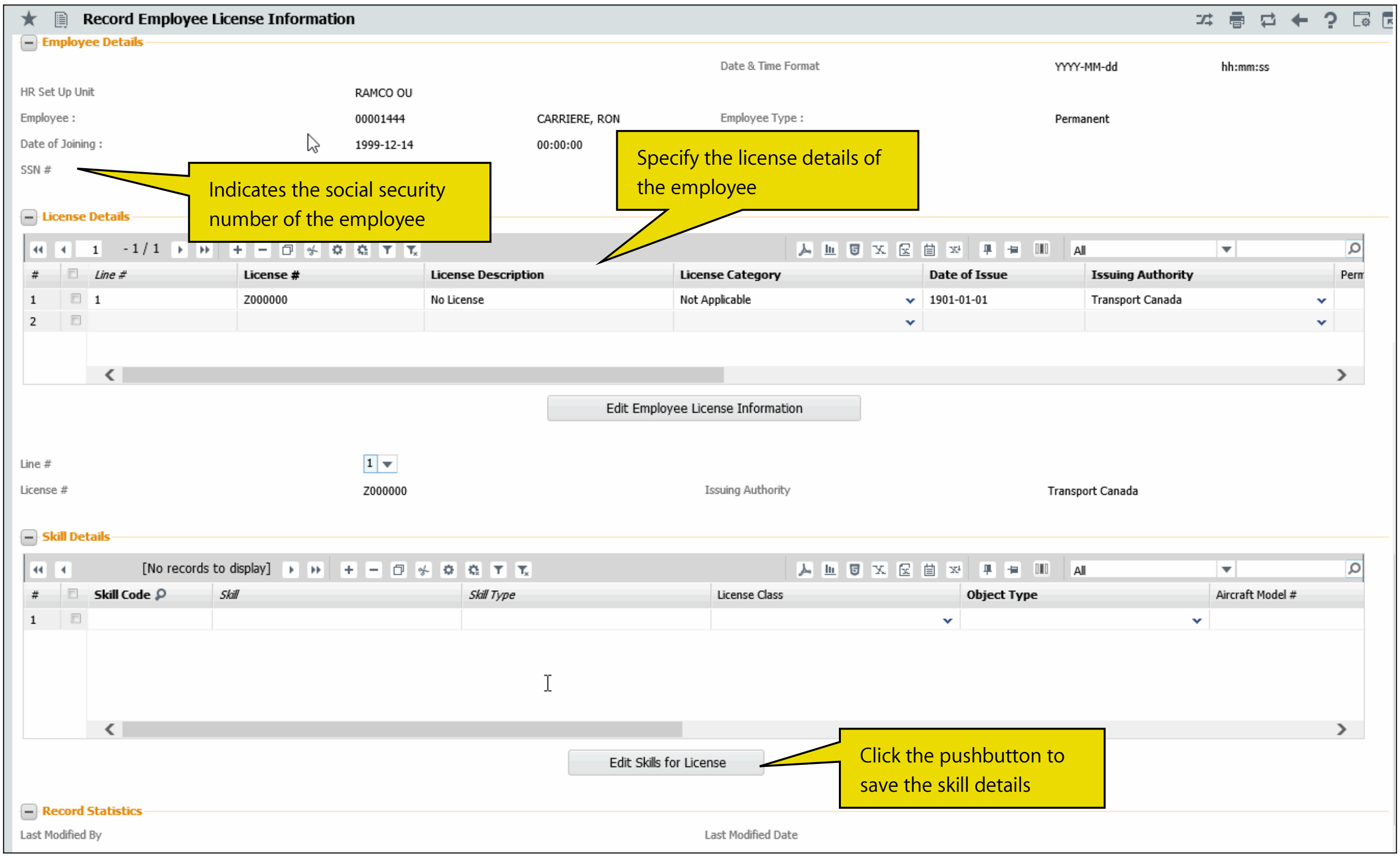

Figure 3.7 Recording employee license information

In the **License Details** multiline,

2. Enter the **License #**, **License Description** fields.

3. Use the License Category drop-down list box and select the category of the license.
4. Enter the Date of Issue of the license to the employee.
5. Use the Issuing Authority drop-down list box to specify the issuing authority of the license.
6. Use the Permanent or Temporary drop-down list box to specify whether the license is issued on a permanent or temporary basis.
7. Enter the Valid From and Valid Till fields of the license.
8. Use the Status of License drop-down list box to specify the status of the License. The system lists the following statuses: Active, Inactive, Revoked and Suspended.
9. Enter the Revoke/Suspension Date on which the license is revoked or suspended and enter the Remarks.
10. Click the **Edit Employee License Information** pushbutton to save the License Details.

In the Skill Details multiline,

11. Enter the **Skill Code** field to identify the grade.
12. Use the **License Class** drop-down list box to specify the license class which is a user-defined field.
13. Use the Object Type drop-down list box to select the type of the object. The system lists the options as "Part Group", "Base Part" and "Aircraft Model".
14. Enter the **Aircraft Model #**, **Part Group #**, **Base Part #**.
15. Enter the **ATA #** specific for the employee. The employee will be allowed to perform procedures on the systems that belong to the ATA number specified here
16. Enter any **Reference #** pertaining to the skill details and enter the **Remarks.**
17. Click the **Edit Skills for License** pushbutton to save the details.

3.8 RECORDING SKILL INFORMATION

You can record the skill information of the employee. The details of the Skill Minimum Desired Level, Possessed Level and Applicable Resource Group can be recorded.

1. Select the **Record Employee Skill Information** link in the **Record Personal Information** page. The **Record Employee Skill Information** page appears. *See Figure 3.8.*

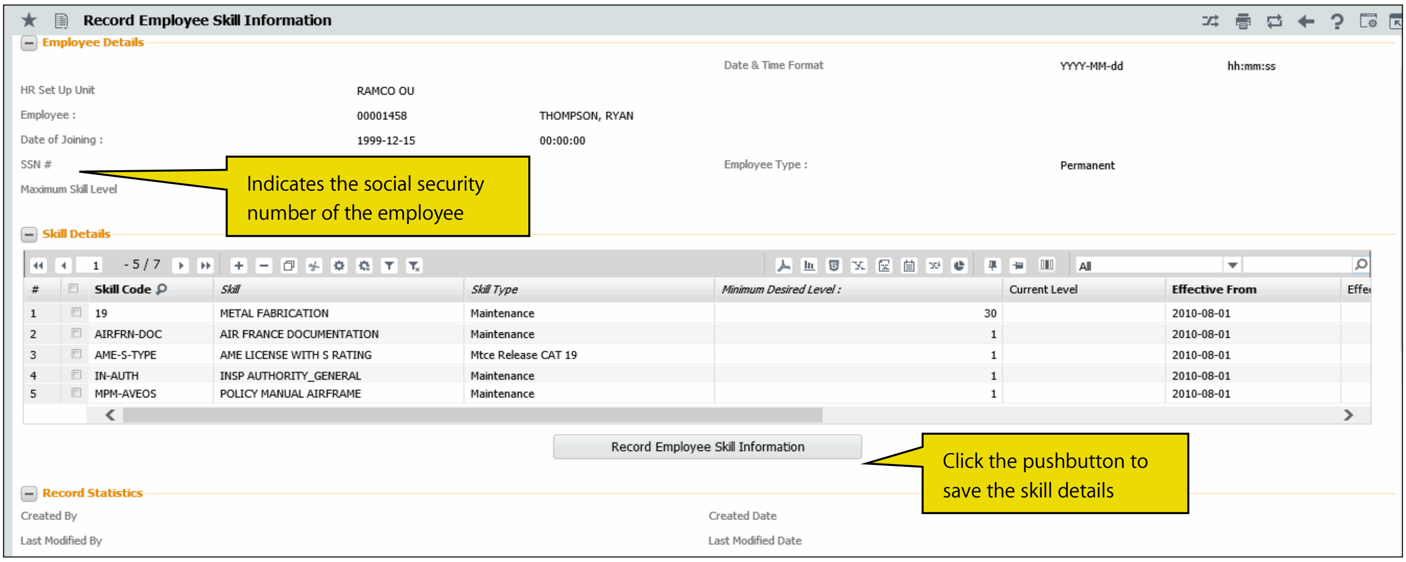

Figure 3.8 Record Employee Skill Information

In the Skill Details multiline,

2. Enter the Skill Code identifying the skill of the employee.

3. Enter the Effective From indicating the date from which the skill details will be in effect.

4. Use the Applicable Resource Group drop-down list box and select the resource group applicable to the skill. Example: Mechanic.

5. Use the Primary / Secondary drop-down list box and select whether the skill is primary or secondary.

6. Enter the **Remarks** pertaining to the skill.

7. Click the **Record Employee Skill Information** pushbutton to save the skill details of the employee.

3.9 RECORDING EMPLOYEE CERTIFICATE

This activity enables to record the certificate information pertaining to the employee. The details of the Certified Skill, Certification Category, Certifying Agency, and Certificate Status are specified in this activity.

1. Select the **Record Certificate Information** link in the **Record Personal Information** page. The **Record Employee Certificate Information** page appears. *See Figure 3.9.*

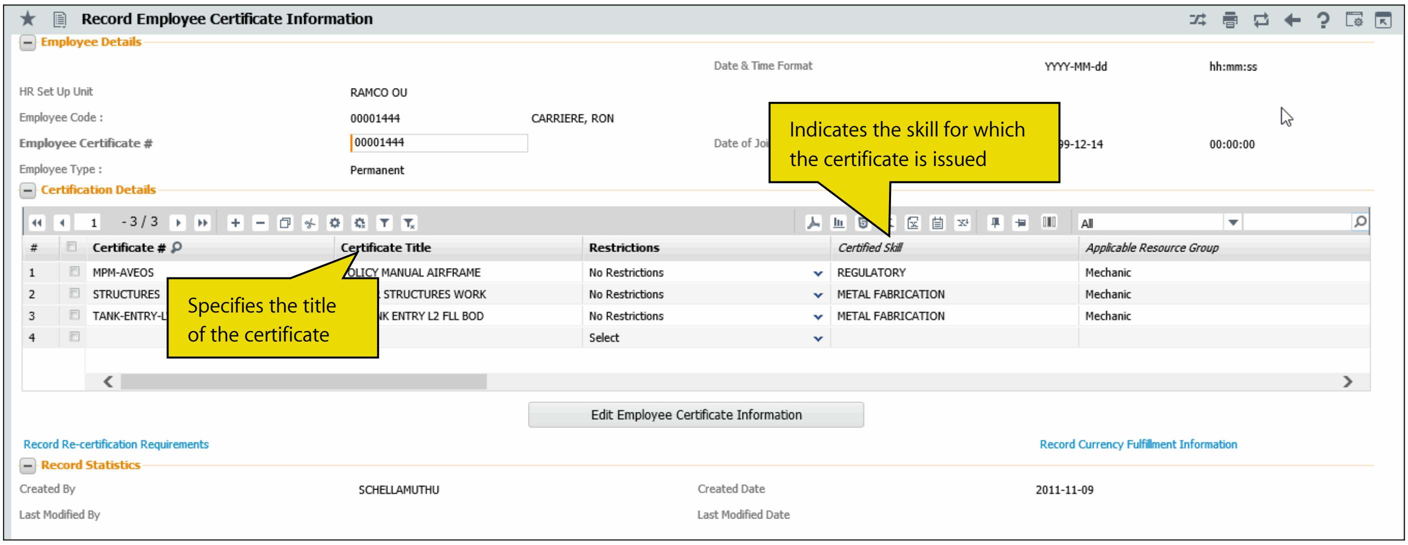

Figure 3.9 Record Certificate Information

In the Certification Details multiline,

2. Enter the Certificate #, Certificate Title fields.

3. Use the Restrictions drop-down list box to specify the machineries that the employee is restricted to operate in spite of acquiring the certification.

4. Enter the Date of Certification, Certified By fields.

5. Enter the Valid From, Valid Till date of the Certificate.

6. Use the Certificate Status drop-down list box to select the certificate status as 'Revoked / Suspended' or 'Currently Active License'.

7. Enter the Revoke / Suspension Date of the certificate.

8. Click the **Edit Employee Certificate Information** pushbutton to save the certificate details.

9. Select the **Record Re-certification Requirements** link to record the re-certification details.

10. Select the Record Currency Fulfillment Information link to record the currency fulfillment details.

3.10 MAPPING USER TO EMPLOYEE

This activity enables to map users of the system with the employees of an organization. A user can be mapped to only one employee at a particular period of time. The login role and login organization unit associated with a user can be viewed. The mapping of user to login role and organization unit is done in the deployment workbench.

1. Select the **Map User to Employee** activity under the **Employee Code Setup** business component. The **Map User to Employee** page appears. *See Figure 3.10.*

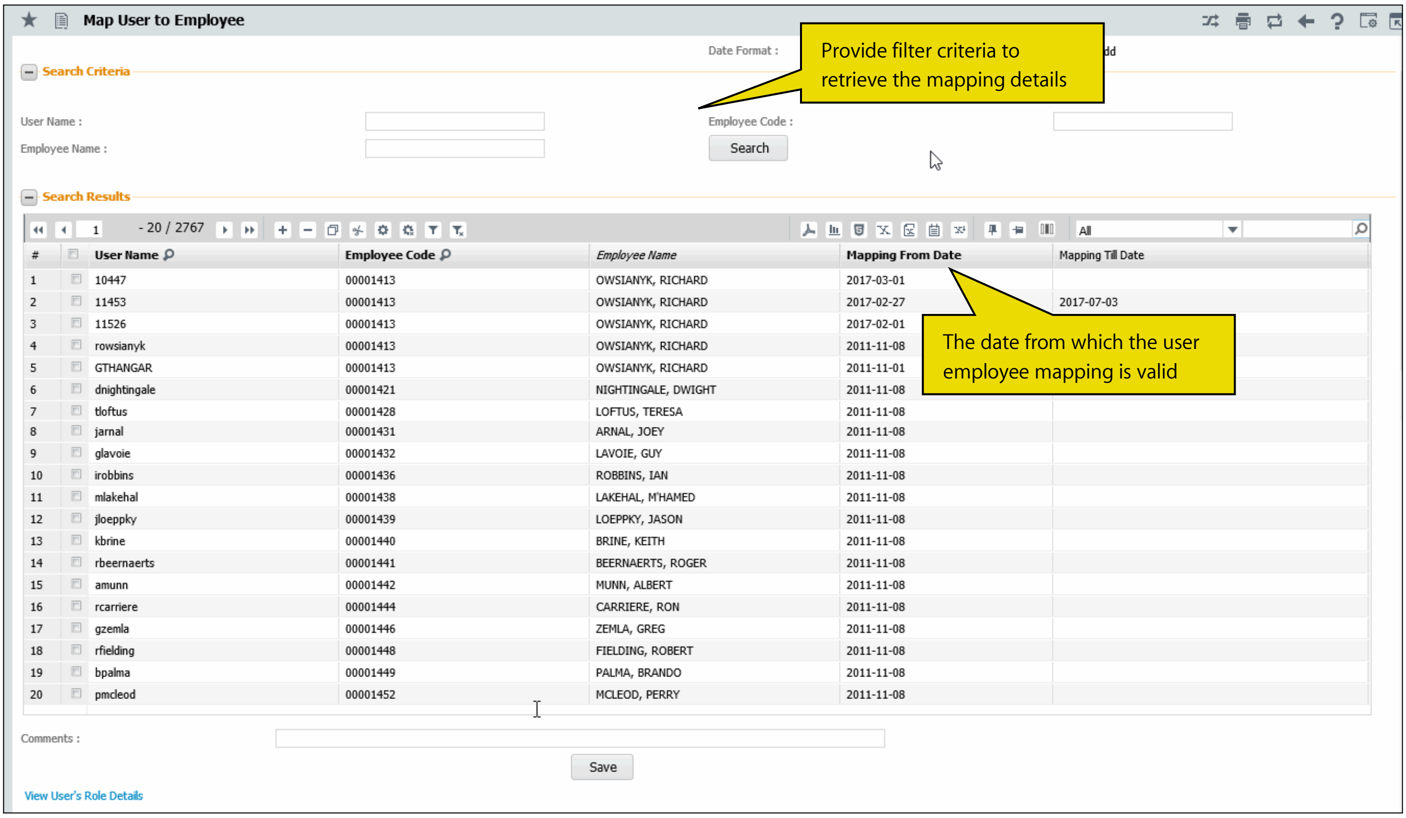

Figure 3.10 Mapping user to Employee

In the **Search criteria** group box,

2. Enter the **User Name**, **Employee Code** and **Employee Name**
3. Click the **Search** pushbutton to retrieve the mapping details.

In the **Search Results** multiline,

4. Enter the **User Name** representing the name of the user who uses the system.
5. Enter the unique code of the employee to be mapped to the user.
6. Enter the **Mapping From Date** indicating he date from which the user employee mapping is valid.
7. Click the **Save** pushbutton to save the required user employee mapping.
8. Select the **View User's Role Details** link to view the details related to the user's role.

EMPLOYMENT INFORMATION MANAGEMENT

The **Employee Information Management** sub process recording employment related information of the employee.

Employment Information business component allows recording various employment details primary / secondary assignment for employees, competency information, qualification information, reward details, etc. The employment information that has been defined or modified through various activities can be authorized or rejected.

Security Definitions business component enables to set access permissions for a user allowing him/her to work with only a restricted set of employee details

4.1 RECORDING PRIMARY ASSIGNMENT

Employment management primarily involves defining a new primary assignment for an employee. An employee can have only one primary assignment. Example: In a software company, the primary assignment of a software engineer is to program. To define a primary assignment for an employee, relevant details must be defined. You must specify the date from which the primary assignment will be effective. You can also perform the following using the **Record Primary Assignment** activity under the **Employment Information** business component:

- Specify the status of the FLSA (Fair Labor Standards Act of 1938) for the employee's job.
- Customize some of the specifications in accordance to the requirements of the organization.
- Specify the group and union affiliation information.

You can also view a gist of the employment history of the employee in the organization. For instance, the system displays the following details:

- The date on which the employee joined the organization
- The date on which the employee's job was confirmed in the organization
- The title of the position held by the employee.
- The assignment details of the employee
- The supervisor of the employee

1. Select the **Record Primary Assignment** activity under the **Employment Information** business component. The Select **Employee to Record Create Primary Assignment** page appears.
2. Enter the **Search Criteria** and click the **Search** pushbutton to retrieve the results in the multiline.
3. Select a record in the multiline and select the **Create Primary Assignment** link at the bottom of the page. The **Create Primary Assignment** page appears. *See Figure 4.1.*
4. Enter the **Assignment Effective From** indicating the date and time from which the primary assignment defined for the employee, must be activated.
5. Enter the **Position** to define the position code for the selected employee.
6. Click the **Get Position Details** pushbutton to retrieve the details related to position entered.

In the **Organizational Attributes** group box,

1. Use the **Employment Unit** drop-down list box to select the employment unit of the employee.
2. Use the **Work Location** drop-down list box to select where the organization is located.
3. Enter the Department code to which the employee belongs in the **Department** field.

In the **Job Attributes** group box,

4. Enter the job code for the selected employee in the **Job** field.
5. Click the **Get Job Details** pushbutton to view the details related to job.
6. Use the **EEO Class** drop-down list box to select the Equal Employment Opportunity classification, which is captured as part of Job Information.
7. Use the **Grade Set** drop-down list box to select the grade set code for the selected employee.
8. Use the **Grade** drop-down list box to select the grade code for the selected employee.

In the **Reporting To** group box,

9. Specify the **Supervisor** of the selected employee.
10. Enter the assignment number of the supervisor in the **Assignment No.** field.

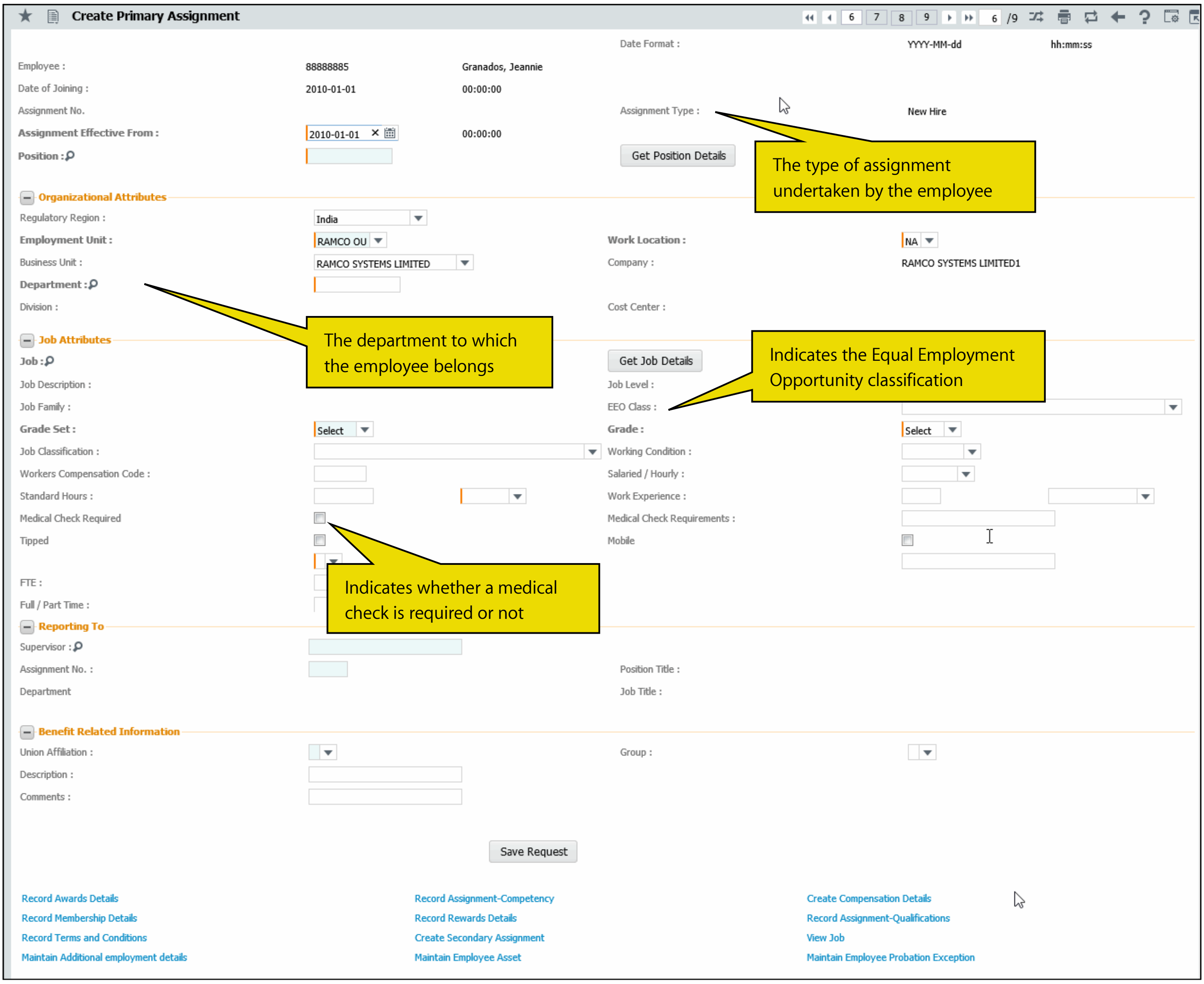

Figure 4.1 Recording primary assignment

In the **Benefit Related Information** group box,

11. Use the **Union Affiliation** drop-down list box to specify the union to which the employee belongs, in the organization.
12. Use the **Group** drop-down list box to specify the group of the union to which the employee belongs.
13. Enter the **Description** and **Comments** fields.
14. Click the **Save Request** pushbutton to save the primary assignment details of the employee.

Additional Information for Creating Primary Assignment

- Select the **Record Award Details** link to define the awards for an employee-assignment combination.
- Select the **Record Assignment-Competency** link to record the competencies required for an employee to perform the assignment.
- Select the **Create Compensation Details** link to record the compensation details of the employee.
- Select the **Record Membership Details** link to record the membership details for an employee.
- Select the **Record Rewards Details** link to record the rewards for an employee-assignment completion.
- Select the **Record Assignment-Qualifications** link to record the assignment qualification.
- Select the **Record Terms and Conditions** link to record the terms and conditions for an employee.

- Select the **Create Secondary Assignment** link to record a new secondary assignment for an employee.
- Select the **View Job** link to view the complete details of a job.
- Select the **Maintain Additional Empoyment Details** link to record and maintain additional employment details for an employee.
- Select the **Maintain Employee Asset** link to maintain asset detaiks of an employee.
- Select the **Maintain Employee Probation Exception** link to record probation details of an employee.

4.2 AUTHORIZING EMPLOYMENT INFORMATION

The employment information that has been defined or modified through various activities in the **Employment Information** business component needs to be authorized. This is achieved through **Authorize Employment Information** activity. You must specify at least one rejection reason, if the employment information has been rejected for authorization. You are also allowed to modify the employment information through this activity, for authorization purpose

Through this activity the Secondary Assignment, Assignment for Non-regular Employees, Assignment Competency, Assignment Qualification, Reward Details, Award Details, Employee's Membership Details and Assignment Terms and Conditions can also be authorized in addition to authorizing the Primary Assignment.

1. Select the **Authorize Employment Information** activity under the **Employee Information** business component. The **Select Employment Information for Authorization** page appears. The system displays the list of activities under **Employment Information** and **No. of request** column for initiating the authorization. See Figure 4.2.

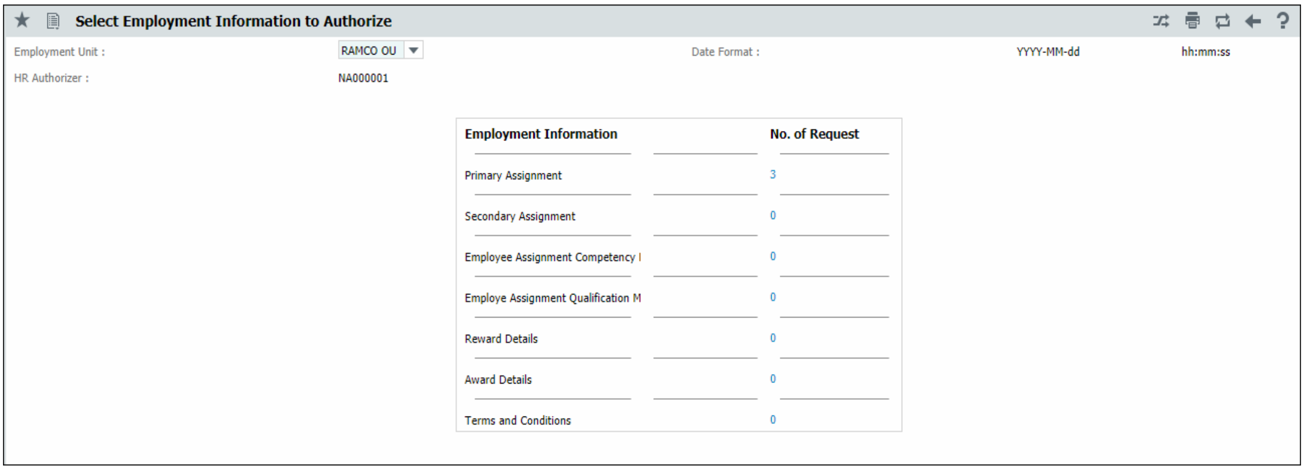

Figure 4.2 Selecting employment information to authorize

2. Select the hyperlink in the **No. of Request** column corresponding to the required activity to go to the **Select Employee to Authorize** page. Select the hyperlinked Employee Name to launch the **Authorize Primary Assignment** page. *See Figure 4.3*.
3. Enter the **Position** to define the position code for the selected employee.
4. Click the **Get Position Details** pushbutton to retrieve the details related to position entered.

In the **Organizational Attributes** group box,

5. Use the **Employment Unit** drop-down list box to select the employment unit of the employee.
6. Use the **Work Location** drop-down list box to select where the organization is located.
7. Enter the Department code to which the employee belongs in the **Department** field.

In the **Job Attributes** group box,

8. Enter the job code for the selected employee in the **Job** field.

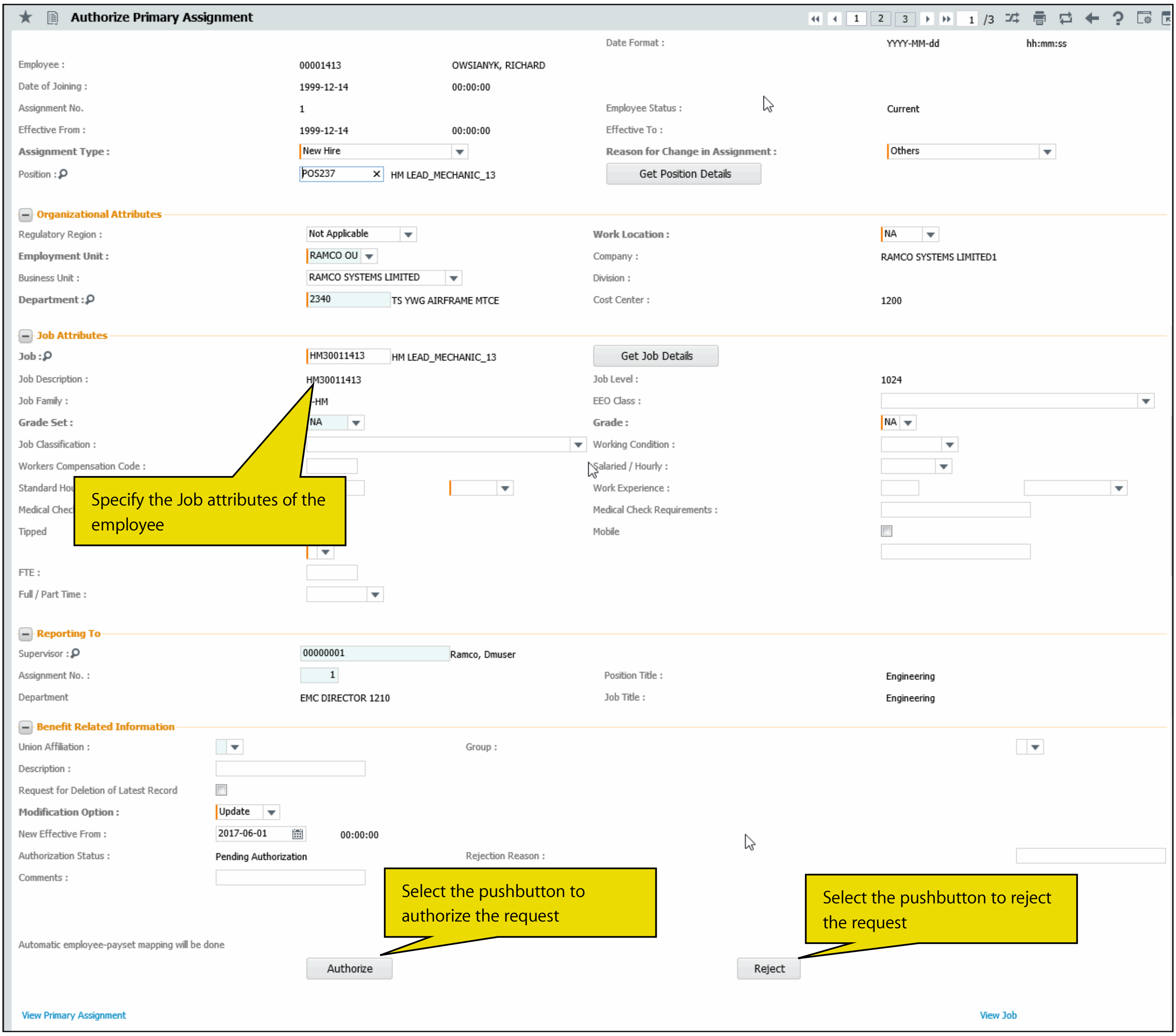

Figure 4.3 Authorize Employment Information

9. Click the **Get Job Details** pushbutton to view the details related to job.
10. Use the **EEO Class** drop-down list box to select the Equal Employment Opportunity classification, which is captured as part of Job Information.
11. Select the **Grade Set** and **Grade** for the selected employee.

In the **Reporting To** group box,

12. Enter the employee code of the supervisor of the selected employee in the **Supervisor** field.
13. Enter the assignment number of the supervisor in the **Assignment No.** field.

In the **Benefit Related Information** group box,

14. Use the **Union Affiliation** drop-down list box to specify the union to which the employee belongs, in the organization.
15. Select the **Group** of the union to which the employee belongs and the description of the union.
16. Click the **Authorize** pushbutton to authorize the request.
17. Specify the **Rejection Reason** and click the **Reject** pushbutton to reject the request.

4.3 DEFINING THE SECURITY

Data Level Security deals with facilitating access permissions different users should have to employee details while ensuring the necessary restrictions and safeguards to prevent indiscriminate user access and manipulation or misuse of sensitive employee information. The **Security Definitions** business component allows creating security group, refreshing the security details, defining user permissions on employees, defining security group permissions and setting employee security parameters.

4.3.1 Defining user permissions on employee

The **Define User Permissions on Employees activity** enables to set access permissions for a user allowing him/her to work with only a restricted set of employee details, which is relevant. The access permissions to employee details are given to a user based on his/her user-role combination and not on an individual basis. Thus the same user can have different access permissions for his/her different login roles, business process chains etc. Note that an organization can exercise the choice to have data level security permissions or otherwise. You can set access permissions to employee details through this activity only if the choice has been made to have data level security permissions.

1. Select the **Define User Permissions on Employees** activity under the **Security Definitions** business component. The **Select User for Security Definitions** page appears.
2. Provide filter criteria to search for the employee and click the **Search** pushbutton. Select the hyperlinked User Name.
3. You can also directly enter the **User Name** and click the **Set Security Definitions** link provided alongside. The **Security Definitions** page appears. *See Figure 4.4*

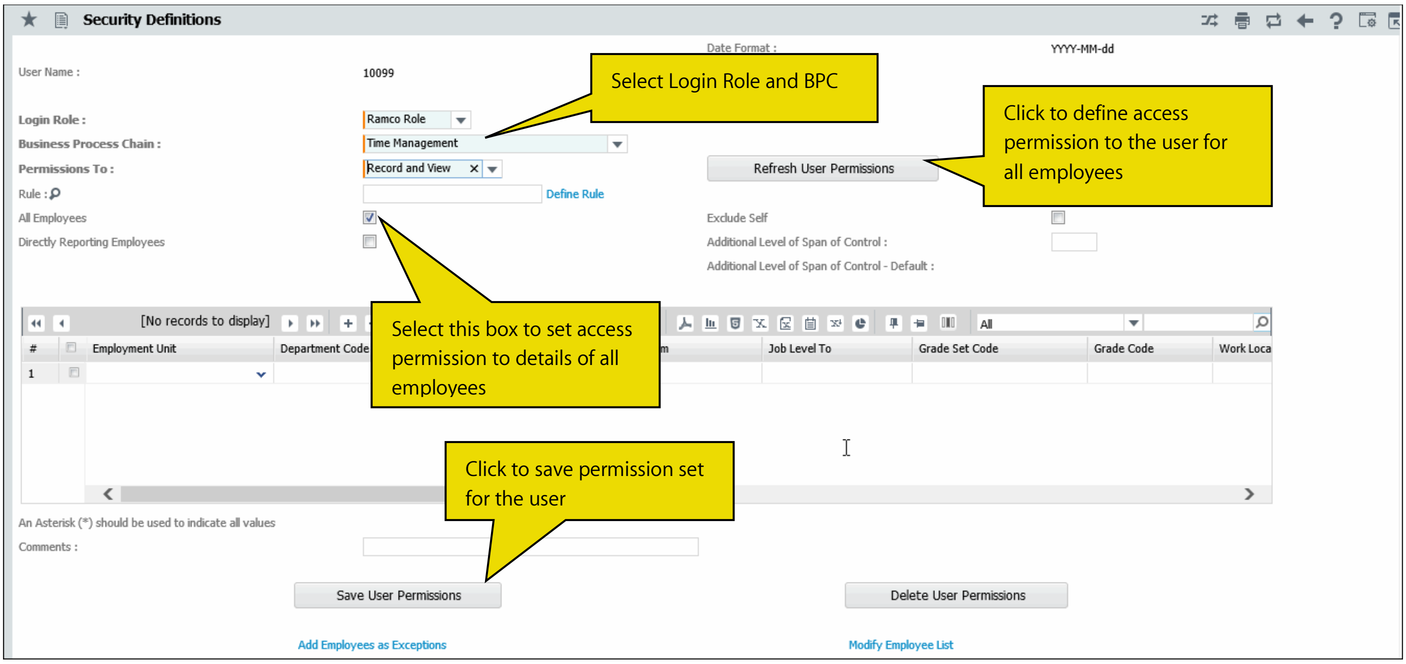

Figure 4.4 Define User Permission on Employees

4. Use the Login Role drop-down list box to specify the role of the user for which the security definitions are to be set.
5. Use the Business Process Chain drop-down list box and select the “Time Management” option.
6. Use the Permissions To drop-down list box and select the “Record & View” option.
7. Select the All Employees check box to set access permissions to the employee details of all the employees.
8. Click the Save User Permissions pushbutton to save the permissions set for the user.
9. Click Refresh User Permissions to define access permission to the user for all employees.

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