ramco Aviation Solutions

HRMS

User Guide

Version 5.4

DISCLAIMER

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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 Aviation Solution.

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 3 chapters and index. Given below is a brief run-through of what each chapter consists of.

Chapter 1 provides an overview of the entire **Human Resource Management** business process. The sub processes are explained in the remaining chapters.

Chapter 2 focuses on the **Employee Record Management** sub process.

Chapter 3 dwells on the **Time 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.

Table of Contents

Chapter 1/Introduction

Every organization is built on human resources. These resources need to be identified, recorded, organized and utilized effectively, to aid the organization in accomplishing it chosen goals. The **Human Resource Management** business process addresses this need, by effecting a two-fold process consisting of **Employee Record Management** and **Time Management**.

The Employee Record Management business process creates and maintains both employment and personal information. Employment information will cover assignments, positions, jobs, departments, etc, to provide a well-rounded professional profile of the employee and an in-depth understanding of the role that the employee performs within the organization. Personal information will cover the employee's educational background with specific reference to skills, qualifications and the licenses that he or she possesses. These inputs are vital for supervisors to decide the most suitable jobs to which employees must be assigned. Personal details also extend to the employee's contact information and family details, to enable the organization to effectively communicate with employees and offer employee-related benefits.

The Time Management business process organizes the employee's availability by creating schedules for every employee. It also records the time logged in by employees against the planned schedules, converts it into normal and overtime attendance, and directs the entire outputs for payments.

Chapter 2/Employee Record Management

The HR department is in charge of managing the employee database. Through Employee Record Management, you can create and maintain complete employee information, required to induct, transfer, separate and re hire the employee. Apart from work-related information of employees such as grade, department, job, and assignment, you can create and maintain personal data such as contact information, qualifications, certificates and skills licenses.

The records can also be analyzed for manpower planning, budgeting and estimation of resources. This input is vital for overall organizational policy and projection of future costs.

The employee record management includes the following:

- Inducting employees
- Transferring employees
- Separating employees
- Rehiring employees

The **HR Setup** business component enables you to create and maintain each job, position, and grade within an organization.

The **Employee Information** business component enables you to enter complete employee information, required to induct, transfer, separate and rehire the employee. This information ranges from employee contact address, to qualifications and skills, to certificates and licenses. It also includes creating assignments for regular and non-regular employees. *See Figure 2.1* to view the business processes involved in managing employee records.

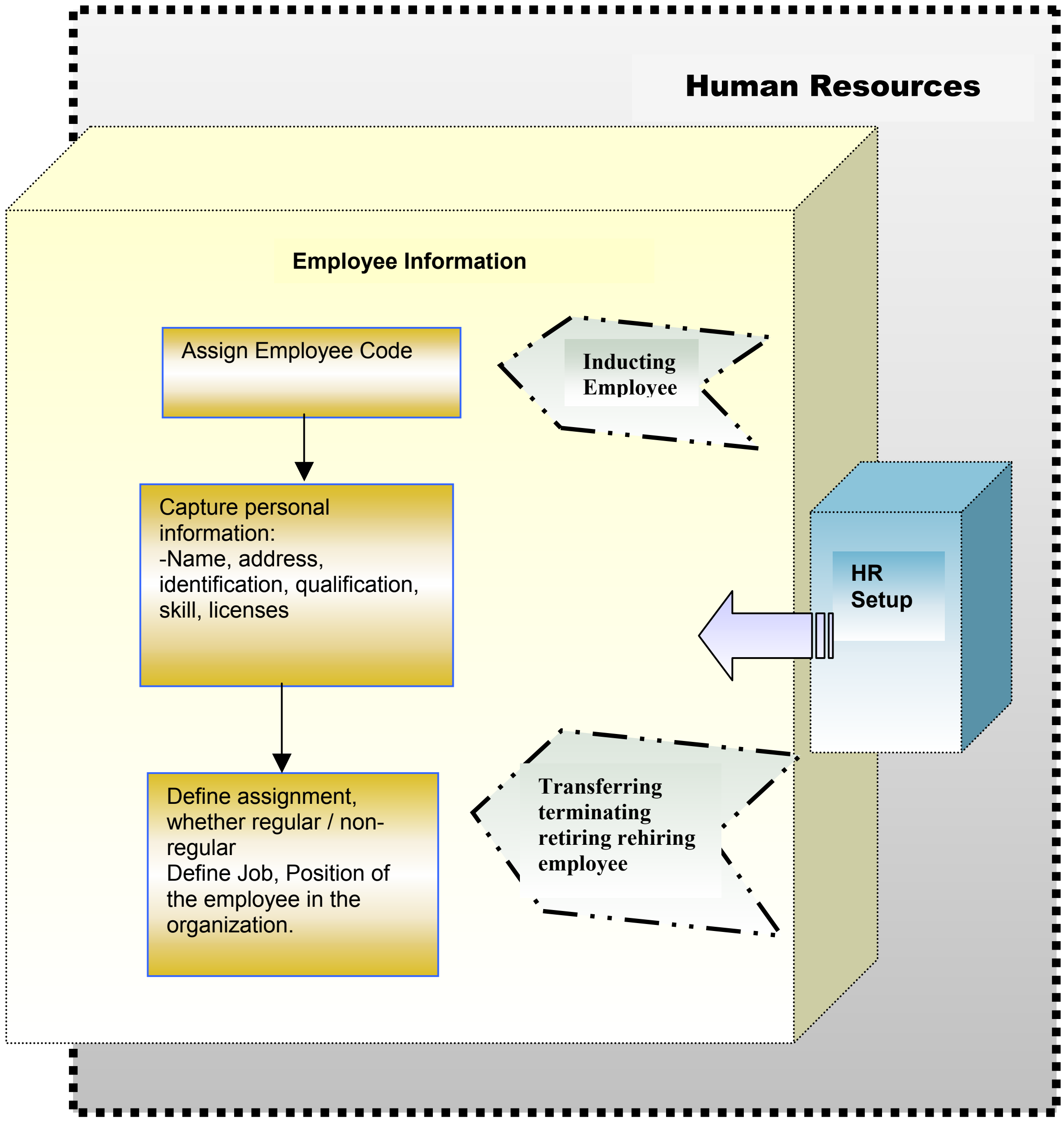

Figure 2.1 Business processes involved in managing employee records

Maintaining the HR Setup

You can create each department, job, position, grade and grade set within the organization. You can also determine whether the number of positions within the organization must be controlled. If the number of positions must be controlled, you are to set the position control flag to "active", enter the exact number of positions and create a unique position ID to identify every position.

Additionally, you can set the various parameters that will influence diverse aspects in the organization, from maximum skill level, to employee display format, to determining whether the number of positions will be controlled. For instance, you can set the maximum skill level parameter to 10, to indicate that the employee's proficiency in a given skill is rated out of 10.

Creating a job

You can create a job. This job is later used in combination with department, to create an assignment for an employee.

1. Choose **Maintain Job** under the **HR Setup** business component. The **Select Job to Edit** page appears.

2. Select **Create Job** link. The **Create Job** page appears. *See Figure 2.2.*

3. Allot a unique **Job Code**.

4. Instead of entering fresh details about the job, you can choose an existing job from the **Job** drop-down list box and select the **Default** pushbutton, to retrieve the details of the existing job. You can edit these details and save it as a new job.

5. Specify **Job Title** and the date that the job title is **Effective From**, in the **Job Attribute** group box.

6. Specify the grade set to which you want to associate the job being defined in the **Applicable Grades** multiline.

7. Specify the job profile and other details, in the **Job Profiles Details** multiline.

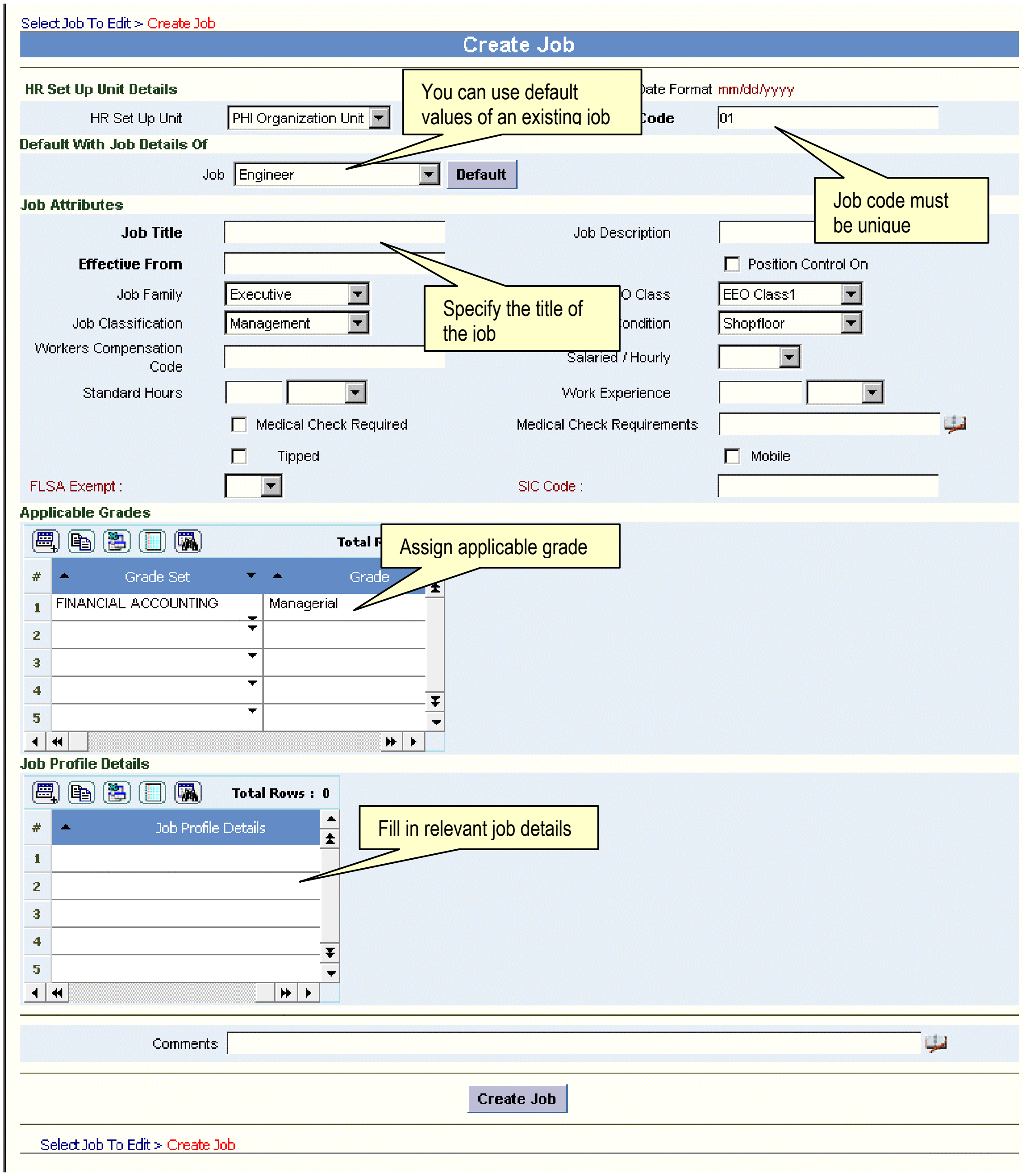

Figure 2.2 Creating Job

8. Click the **Create Job** pushbutton to save the details.

Note: You may edit the new job.

Creating a position

To create a position, you are to specify the combination of a department and a job. This position can be mapped to an employee, to create an employee assignment.

1. Choose **Maintain Position** under the **HR Setup** business component. The **Select Position to Edit** page appears. At the bottom of the page, click the **Create Position** link. The **Select Department-Job** page appears. *See Figure 2.3.*

You can create a position for the required job-department combination. Enter the required department and job codes, in the corresponding fields.

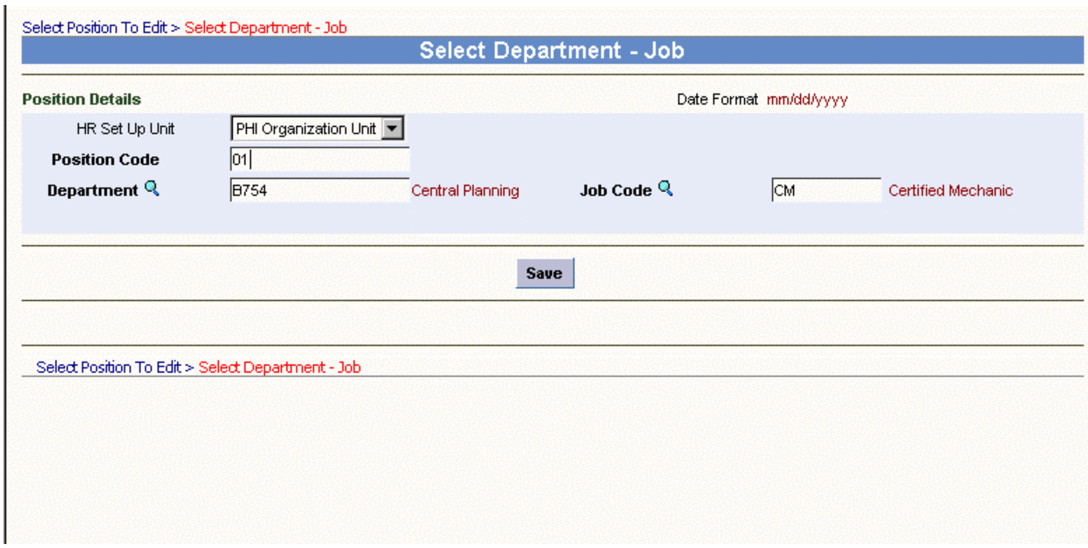

Figure 2.3 Selecting the department and job for position.

2. Assign a **Position** Code and then click the **Save** pushbutton. If the position control check box is set to "active" for the selected job, the 'Create Position Control ID ' link is enabled. Otherwise, the 'Create Position' link is disabled.

3. Click **Create Position** to generate the position. The **Create Position** page appears. *See Figure 2.4.*

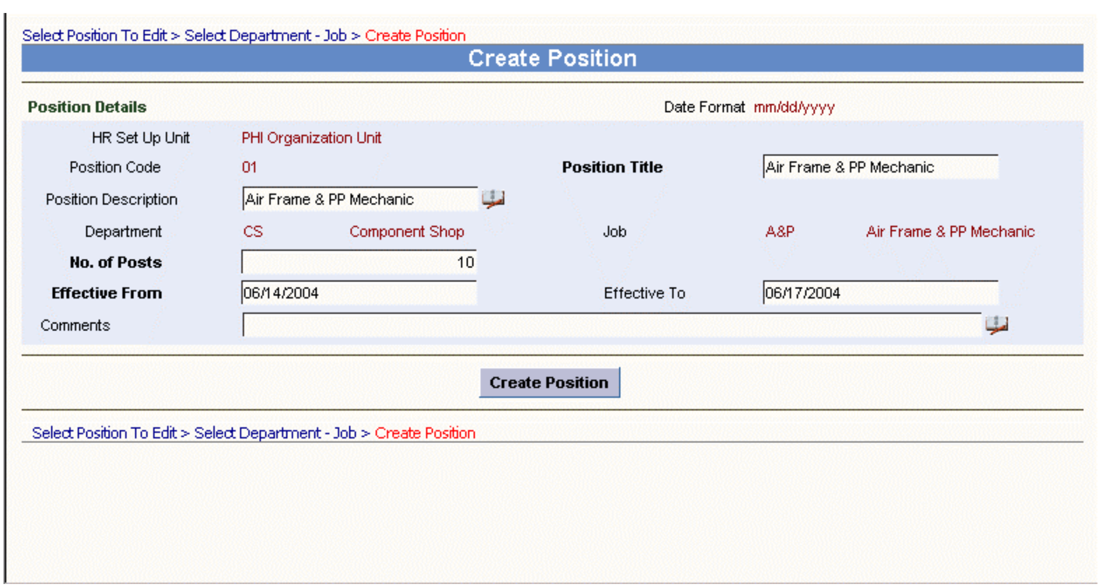

Figure 2.4 Creating position in HR setup

4. Enter the **Position Title** and **No. of Posts**. The position title and position description are the same as the job title and job description, in other words, the position title and description take the default values of job title and description.

5. Click the **Create Position** pushbutton.

Setting position control Ids

You can choose between two scenarios:

- Position Control – 'On'
- Position Control – 'Off'

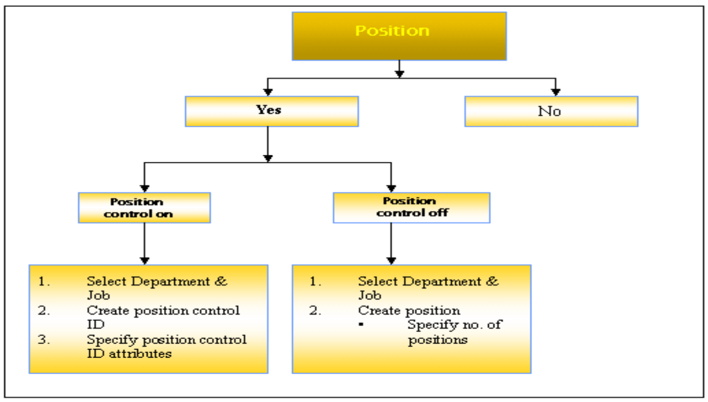

Figure 2.5 Setting position control Ids

Creating position control Ids

You can create position control IDs for a job for which the position control is set to 'on". You can create a position for the required job-department combination. The position control ID series indicates the organizational and employment attributes of the position. The organizational attributes comprise details such as, regulatory region and work location for the position and the employment and business units. The employment attributes consist details such as, reporting to position, maximum headcount, Current head count, FTE and also the details whether the corresponding position is regular or temporary, and full time or part time. You can also set the status of the position control ID to active or inactive status. *See Figure 2.5.*

1. Select the **Create Position Control ID** link in the **Create Position** page. The **Create Position control ID's** page appears. *See Figure 2.6.*

The system displays the unique code of the position, department and job, for which you want to generate the position control IDs.

2. Enter the title for the position being created, the number of posts required for the position and the date from which the position will be effective.

3. Select the **Inactive** check box if you want to make the position control ID details inactive. This will result in the details being unavailable for use in other activities. From the drop-down list box, select the required position control ID series to which you want to attribute the position.

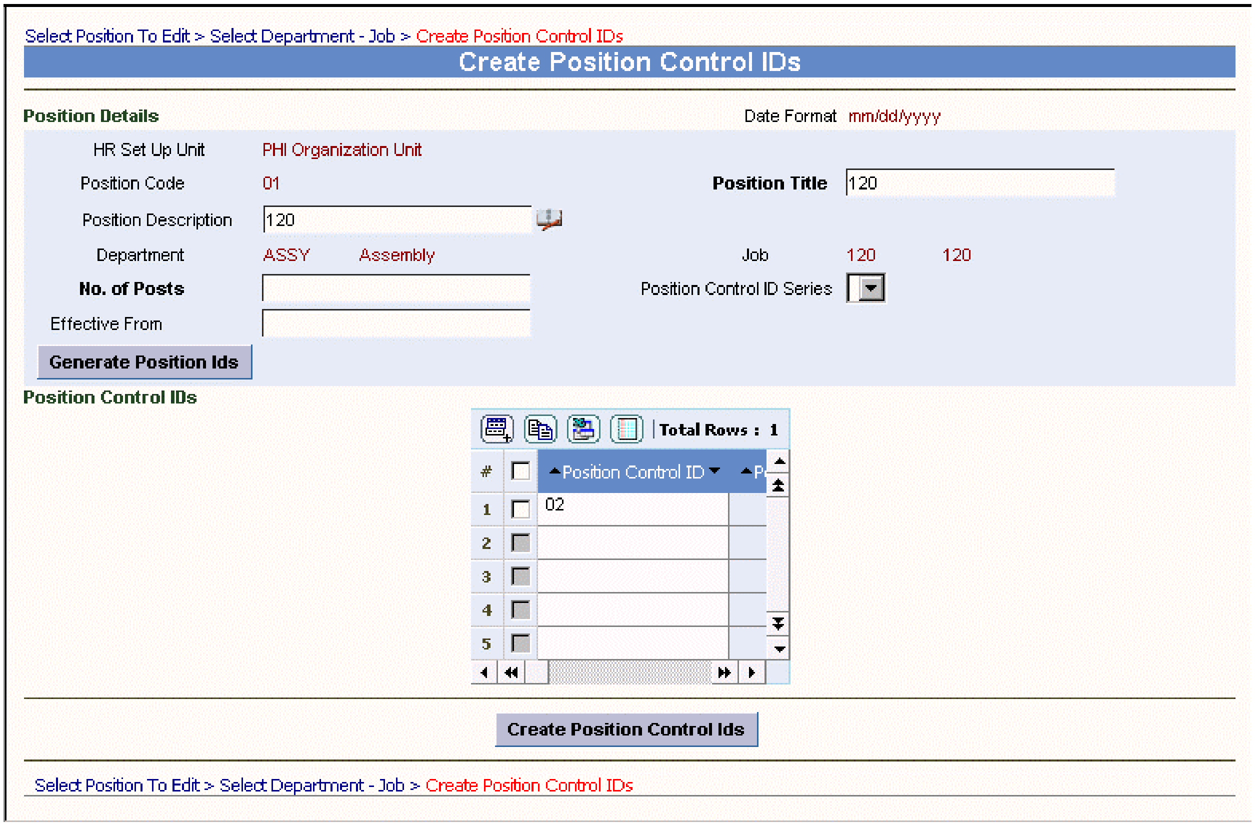

Figure 2.6 Creating Position Control ID

4. Select the **Generate Position IDs** pushbutton. The system generates a position control ID for each post specified. For example, if the number of posts specified is six, the system generates six-position control IDs.

You can view the position control ID generated by the system in the **Position Control IDs** multiline. You can also edit this value.

5. Select the **Create Position Control IDs** pushbutton, to save the details entered.

Setting up basic HR information

The basic HR information that you can set will include the following

- Assigning values to HR options, such whether the Position control ID is applicable or not, and the denominator on which a skill of the employee must be rated

- Set a prefix and start value for the employee codes in the organization
- Create or edit business rules or logic for specific areas such as Retirement
- Customizing specific field literals
- Indicate that master data must be populated in new organization units.

Refer to the Online Help for the "Set HR Options" activity, for more information on the tasks below.

See Figure 2.7. for viewing the Human Resource Management component interaction.

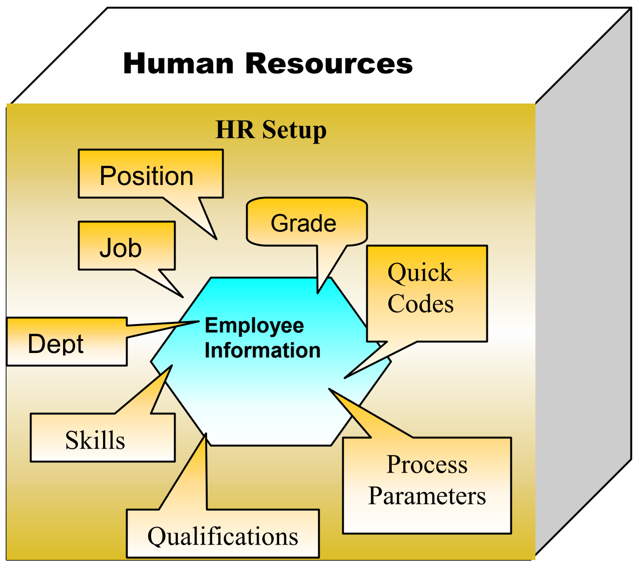

Figure 2.7 Human Resource Management component Interaction

1. Select **Basic HR Setup** activity under the **HR Setup** business component. *See Figure 2.8.*

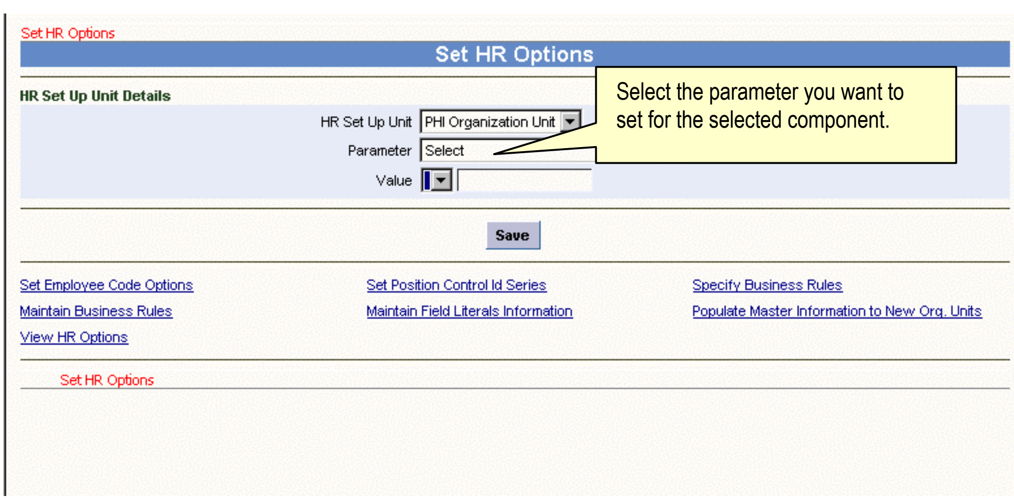

Figure 2.8 Setting up basic HR information

2. To assign values to HR option such as Position Control ID, use the **Parameter** and **Value** fields. For example, choose “Position control ID” in the **Parameter** field, and choose “On” or “Off” in the **Value** field.

You can proceed to do the following,

- Set a prefix and start value for employee codes using the **Set Employee Code Options** link.
- Create business rules using the **Maintain Business Rules** link.
- Edit business rules using the **Specify Business Rules** link.
- Define the prefix and other details of the Position Control ID series using the **Set Position Control ID Series** link.
- Indicate that master information must be populated in all new organization units using the **Populate Master Information to New Org. Units** link.
- Edit specific field literals using the **Maintain Field Literals Information** link.

Maintaining quick codes

You can create quick codes, which will be applicable across the product. Quick codes are the values listed inside drop-down list boxes. For example, you may require the field “Ethnicity” to contain the following quick codes in its drop-down list box: Caucasian, Asian, African. You are to create these quick codes in the “Maintain Quick Codes” screen, for the specific field “Ethnicity”. Once this information is saved, the field “Ethnicity” will always contain these drop-down values wherever this field appears in the product.

1. Choose **Maintain HR Quick Codes** under the **HR Setup** business component. The **Maintain HR Quick Codes** page appears. *See Figure 2.9.*

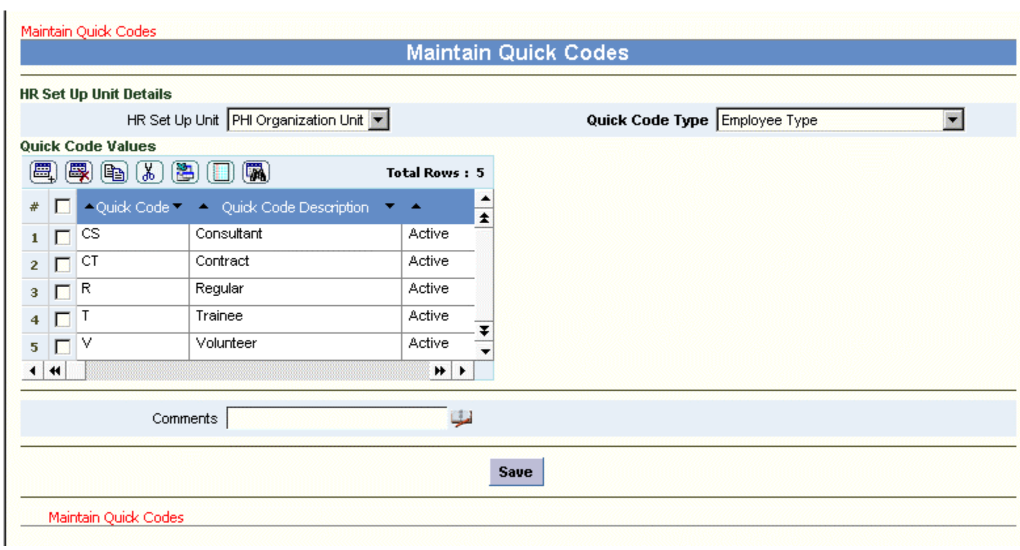

Figure 2.9 Maintaining HR Quick Codes

2. Use the **Quick Code Type** drop-down list box, to indicate the type to which the quick code belongs. For example, choose “Ethnicity”

3. Specify the **Quick Code**, **Quick Code Description** and **Status** in the **Quick Code Values** multiline. Using the example, enter the following: “Caucasian”, ”Asian”, ”African”. The status “Yes” indicates that the quick code is not available for other activities. “No” indicates that the quick code is available for other activities.

4. You can enter comments pertaining to the quick codes, in the “Comments” field below the multiline.

5. Click the **Save** pushbutton to save the quick codes.

Viewing masters definitions

You can view the following master definitions, from the **View Master Definitions** activity:

- Qualification
- Skills
- Certificate Details
- Department
- Grade details
- Job details
- HR Options
- State

Viewing quick code master definitions

1. Choose **View Master Definition** under the **HR Setup** business component. The **View Quick Codes** page appears. *See Figure 2.10.*

2. Use the **Quick Code Type** drop-down list box, to select the type of quick code whose master definitions you want to view.

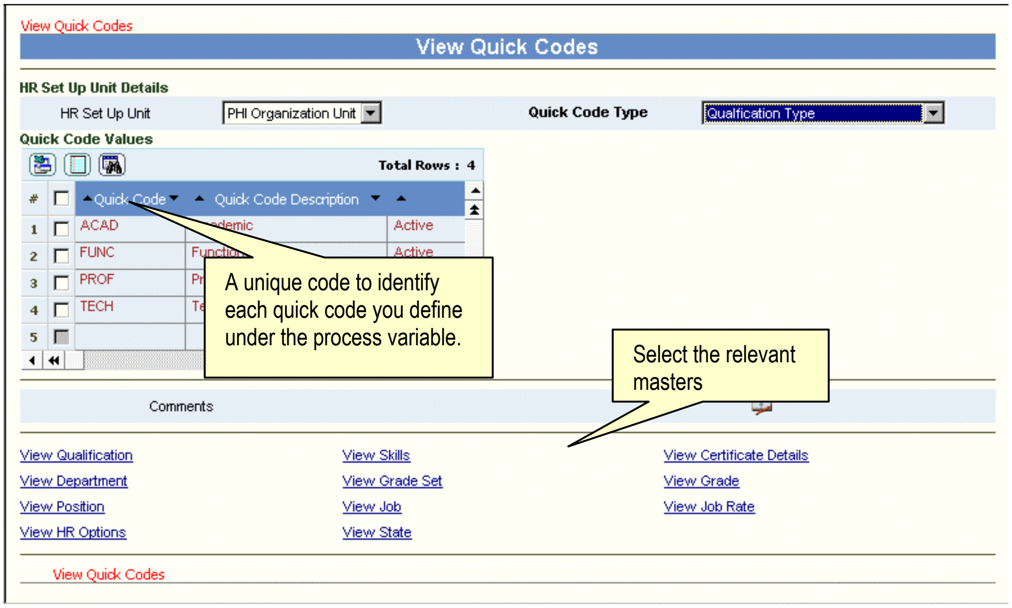

Figure 2.10 Viewing the master definitions for quick codes

Viewing other master definitions

1. Select the hyperlinks at the bottom of the **View Quick Codes** page, to view master definitions. For example, to view the master definitions pertaining to skills, select the **View Skills** link.

Maintaining Employee Information

You can identify every employee in the organization uniquely, by an employee code. You are to create his or her basic details such as family and contact. You can build up employee information further, by entering the following educational specifics: qualifications, skills, certificates and licenses possessed by the employee. To draw up a comprehensive professional profile of the employee, you are to create the employee's assignment record. Through the assignment record, you can establish his or her job, position, department, grade set, grade, supervisor and any other details that will offer an exact understanding of the role performed by the employee within the organization. With the completion of the employee's personal and assignment details, his or her induction into the system is complete.

Every employee who is inducted into the system is either a regular or a non-regular employee. A regular employee is on the permanent roles of the company, while a non-regular employee is hired for accomplishing a particular task within a stipulated period. You can treat regular and non-regular employees differently, right from the employee code to the employee assignment information maintained. For non-regular employees, you can enter a valid assignment period, extend the period or short close it. For regular employees, the assignment will be continuous without an end date.

Employee Induction information, ranging from qualifications, skills, licenses to employee assignment, is the pivot on which work order allocation, authorization profile setting, promotions, transfers, etc, are executed.

Before you induct an employee, you must define the master definitions such as department, job, position, qualifications, certificates, and the method of generating the employee code.

Creating an employee file

You are to uniquely identify the details of each employee, in an employee file. The employee code is either generated automatically by the system or you are to enter it manually, depending upon what you had specified in the Employee Code Setup options. You can also create the assignment details of the employees and non-regular employees.

1. Select **Create Employee File** under the **Employee Information** business component. The "Create Employee File" appears. *See Figure 2.11.*

2. Select the **HR Set Up Unit** applicable to the login employment unit.

3. Select the employee code from the **Employee Code** drop-down list. The employee code in the **Employee Code** field can be auto-generated or entered manually. This depends on the options selected in the **Basic HR Setup** activity in the **HR Setup** business component.

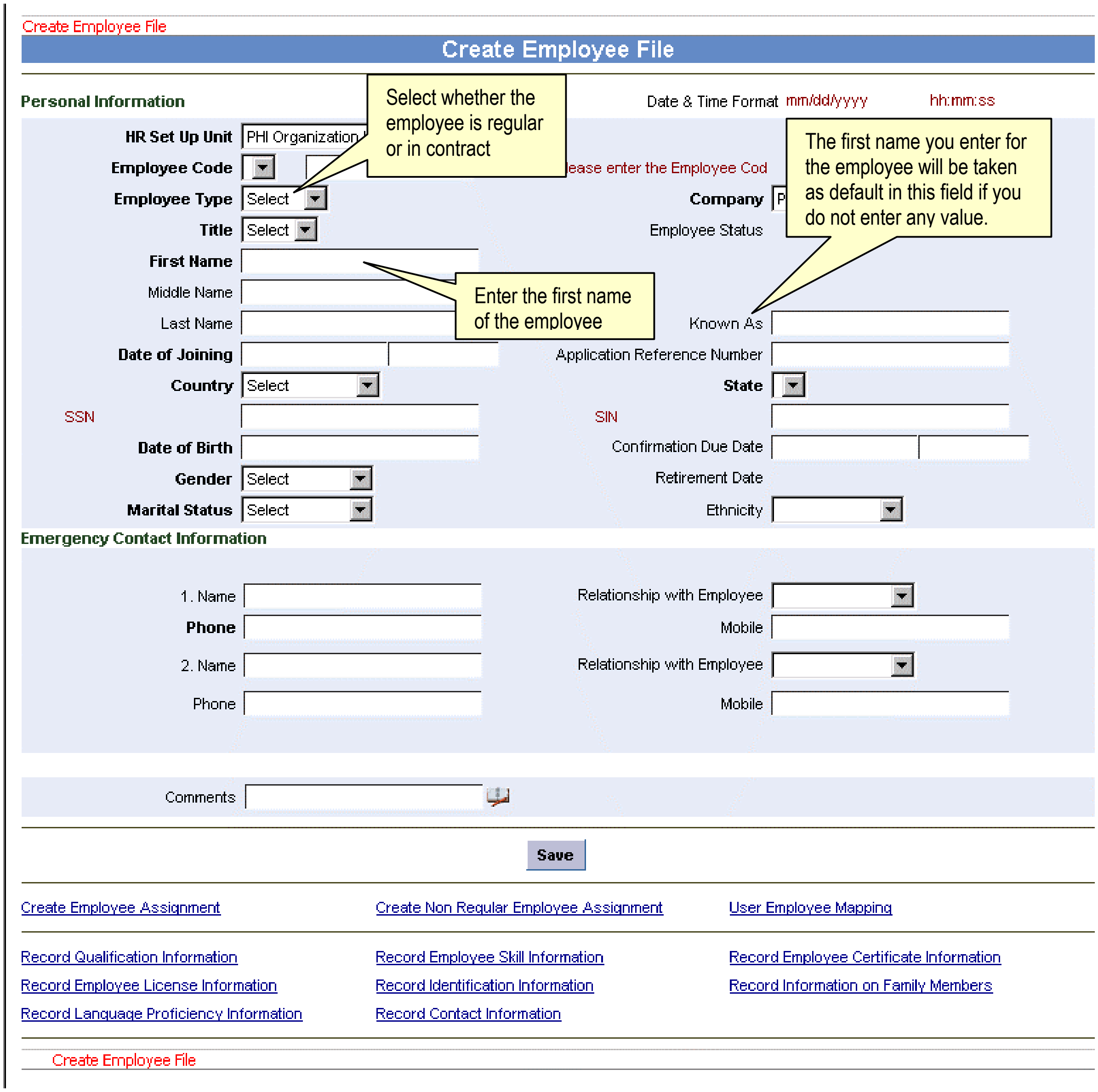

Figure 2.11 Creating employee file

4. Enter the **Company** to which the employee belongs and the **Title** that can be used for the employee.

5. Select the **Employee Type**, to indicate whether the selected employee is a regular employee, hired on contract for a limited period, or a consultant.

6. Enter the **First Name, Middle Name and Last Name** of the employee and the **Date Of Joining**.

7. Select the **Country** and **State** to which the employee belongs.

8. Enter the **Date of Birth** of the employee.

Note: Ensure that the age of the employee is greater than 14 years and less than 100 years. The age of the employee is calculated as the difference between the date of birth and the date of joining of the employee.

9. Enter the **Emergency Contact Information**, and then click the **Save** pushbutton.

You can proceed to do the following:

- Create Employee Assignment
- Create Non Regular Employee Assignment
- User Employee Mapping
- Record Qualification Information
- Record Employee Skill Information
- Record Employee Certificate Information
- Record Employee License Information
- Record Language Proficiency Information
- Record Identification Information
- Record Information on Family Members
- Record Language Proficiency Information
- Record Contact Information

Creating employee records in bulk

You can create multiple employee records simultaneously. You can update the employee records with the skill and assignment information.

1. Select the **Bulk-Create Employee Records** link under the **Employee Information** business component. The **Bulk-Create Employee Records** page appears. *See Figure 2.12.*

In the **Employee Details** multiline,

2. Select the **HR Setup Unit** applicable to the login employment unit.
3. Select the **Employee Code Prefix**.

Note: You can select a prefix only if the "Employee Code Prefix" option is enabled in the "Set Employee Code Options" page of the "Basic HR Setup" activity of the "HR Setup" business component.

4. Specify the **Employee Code Manual**, if you wish enter the employee code manually.

Note: You must enter the employee code manually, if the "Employee Code Generation Method" field is set as "Manual" in the "Set Employee Code Options" page of the "Basic HR Setup" activity of the "HR Setup" business component. Otherwise, leave the field blank.

Note: The length of the employee code must not be greater than the "Length of Employee Code" specified in the "Set Employee Code Options" page of the "Basic HR Setup" activity of the "HR Setup" business component.

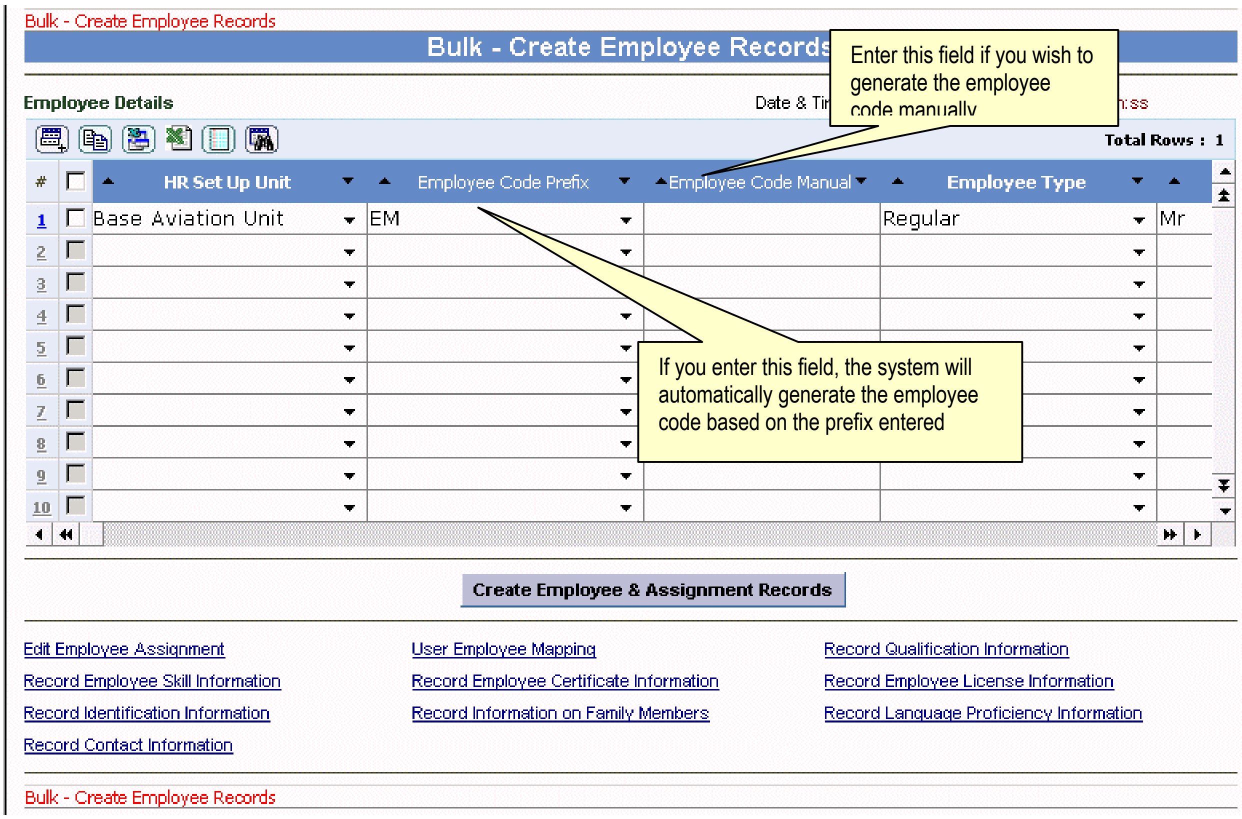

Figure 2.12 Creating employee records in bulk

5. Specify other details regarding the employee, such as **Employee Type**, **Title**, **Company**, **First Name**, **Middle Name**, **Last Name**, **Date of Joining**, **Country**, **State**, **Date of Birth**, **Gender**, and **Marital Status**.

6. Specify the skill details pertaining to the employee, such as **Primary Skill #, Possessed Level** (the level to which the employee possesses the skill) and **Applicability Resource Group**.

7. Specify the details of assignments undertaken by the employee, such as **Assignment Type**, Assignment **Effective From**, **Department Code**, **Job Code**, **Grade Set** and **Grade.**

8. Enter the **Supervisor Code** for the employee.

Note: In this field you are also allowed to enter an employee code that is being created in this page

Ensure that the supervisor code and the "Employee Code Manual" are different for a line item.

9. Click the **Create Employee & Assignment Records** pushbutton to create the employee records and update the skill and assignment details for the employees.

If the **Employee Code Generation Method** field is set as "Automatic" in the **Set Employee Code Options** page of the **Basic HR Setup** activity of the **HR Setup** business component, the system generates the employee code by incrementing the latest employee code available for the HR setup unit.

You can proceed to do the following:

- Edit Employee Assignment
- User Employee Mapping
- Record Qualification Information
- Record Employee Skill Information
- Record Employee License Information
- Record Identification Information
- Record Language Proficiency Information
- Record Contact Information

Creating assignments for employees

You can allocate an assignment to an employee for a specific position; only then will the employee be available as a resource for other processes.

You first need to define the process parameters in the "Basic HR Setup" activity in the **HR Setup** business component, for the job and position. Depending on whether the employee is regular or non-regular, you can create the relevant assignment.

Creating assignments for regular employees

1. Select **Create Employee Assignment** from the **Create Employee File** page. The **Create** Assignment page appears. *See Figure 2.13.*

2. In the **Assignment Type Details** group box, enter the date from which the employee assignment record has come into effect.

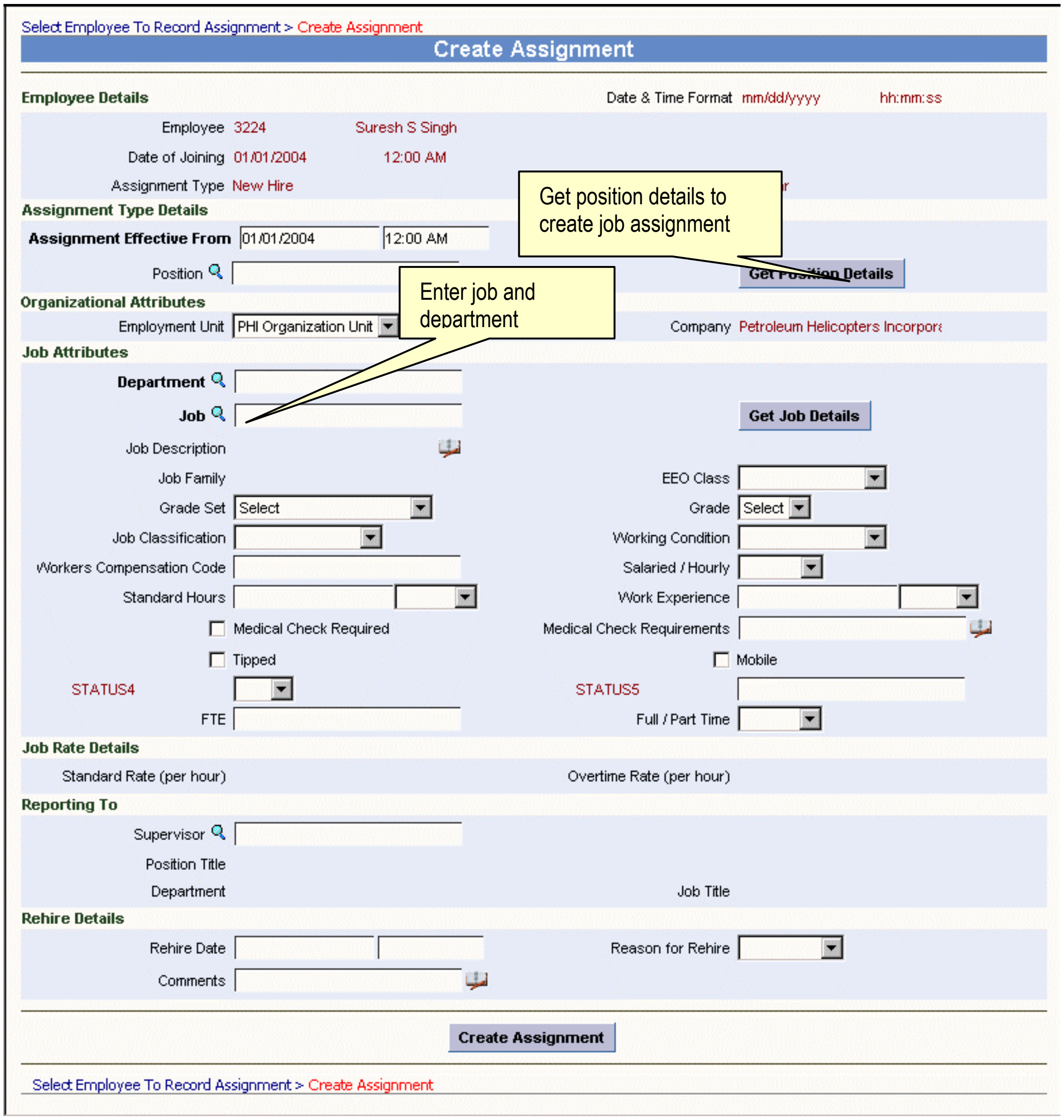

Figure 2.13 Creating assignments

3. Select the **Get Position Details** pushbutton, to view the details related to position. You cannot define a position for which you do not have access permissions.

4. Specify organizational attributes.

5. In the **Job Attributes** group box, specify the **Department** and **Job**. Specify the **Grade Set**, **Grade**, **Job Classification** and **Working Condition** for the assignment. Specify the employee type and whether the employee is paid on a fixed salary basis or an hourly basis.

6. In the **Job Rate Details** group box, define normal rates and overtime rates per hour.

7. Specify the **Supervisor** to which the employee will report.

8. If relevant, enter the date on which the employee is rehired and the reason for rehiring the employee, in the **Rehire Details** group box.

9. Click the **Create Assignment** pushbutton, to save the details.

Note: You can edit the assignments from the "Select Employee to Record Assignment for Regular Employees" page You can also record the employee assignments in the "Record Employee Assignment" activity.

Creating assignments for non-regular employees

1. Select **Create** Non-**Regular Employee Assignment** link from the **Create Employee File** page. The **Create non-regular assignment** page appears. *See Figure 2.14.*

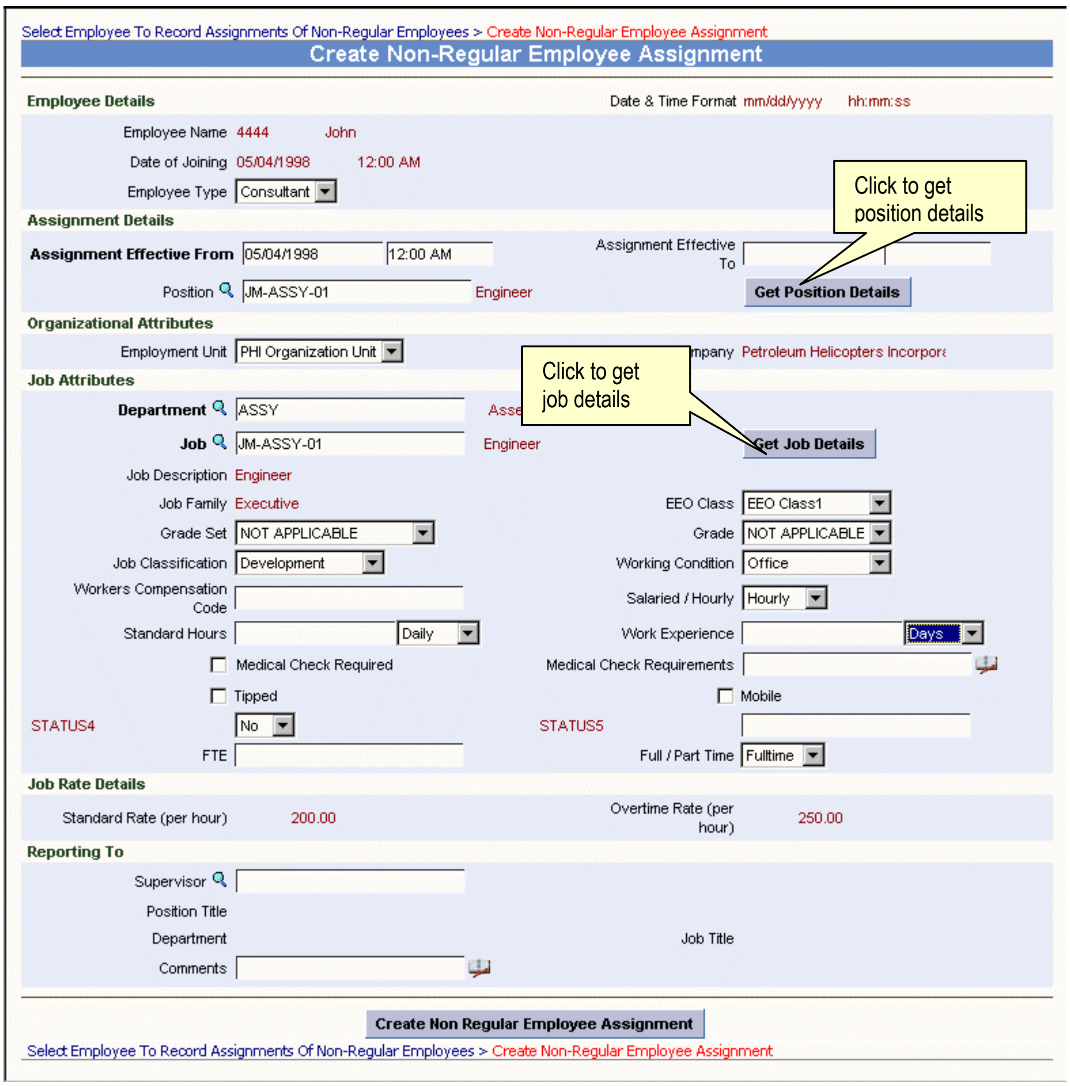

Figure 2.14 Creating non-regular employee assignment

2. In the **Assignment Type Details** group box, enter the date from which the employee assignment record has come into effect

3. Select the **Get Position Details** pushbutton to view the details related to position. You cannot define the position for which you do not have access permissions.

4. Specify organizational attributes.

5. In the **Job Attributes** group box, specify the department and job. Specify the **Grade Set**, **Grade**, **Job Classification** and **Working Condition** for the assignment. Specify employee type and whether the employee is paid on a fixed salary basis or an hourly basis.

6. In the **Job Rate Details** group box, define the normal rate and overtime rate per hour.

7. Specify the **Supervisor** to which the employee will report.

8. Click the **Create Non-regular Employee Assignment** pushbutton to save the details.

You can edit the assignments from "Select Employee to Record Assignment for Non-Regular Employees" page. You can record the employee assignments in the "Record Non-regular Employee Assignment" activity.

Recording personal information

Through this activity, you can record or edit the personal information of an employee. Personal information refers to the personal and employment details of the employee.

1. Select Record **Personal Information** under the **Employee Information** business component. The **Select Employee** appears. *See Figure 2.15.*

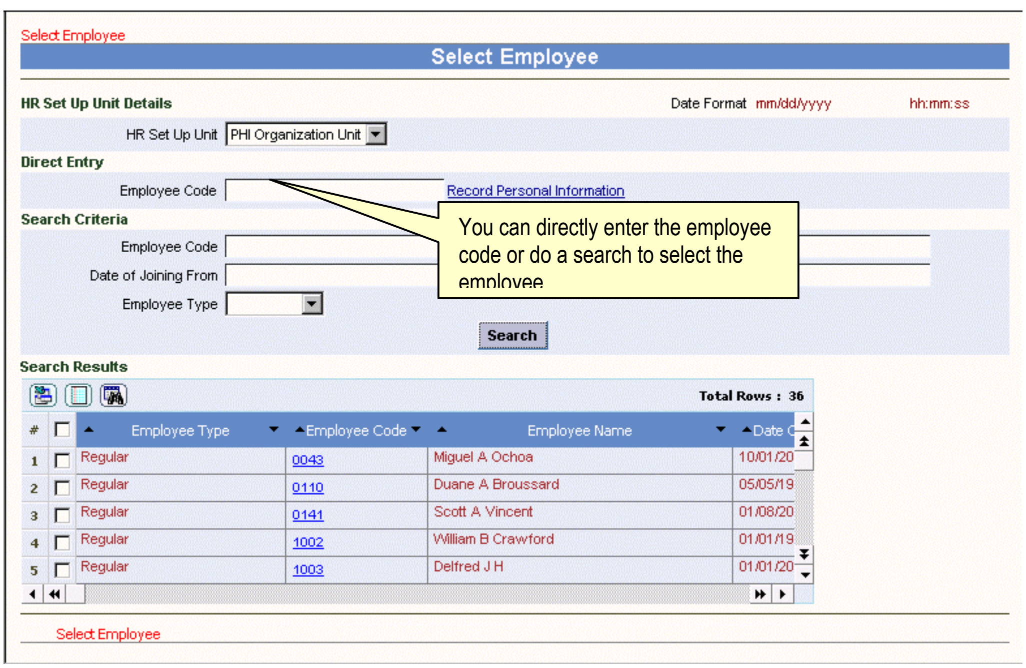

Figure 2.15 Selecting an employee for recording personal information

2. Use the **Employment Unit** drop-down list to select the employment unit.

3. Enter the **Employee Code** directly, or use the **Search Criteria** group box to retrieve the employee code.

4. Select the **Record Personal Information** link next to the employee code field. The **Record Personal Information** page appears. *See Figure 2.16.*

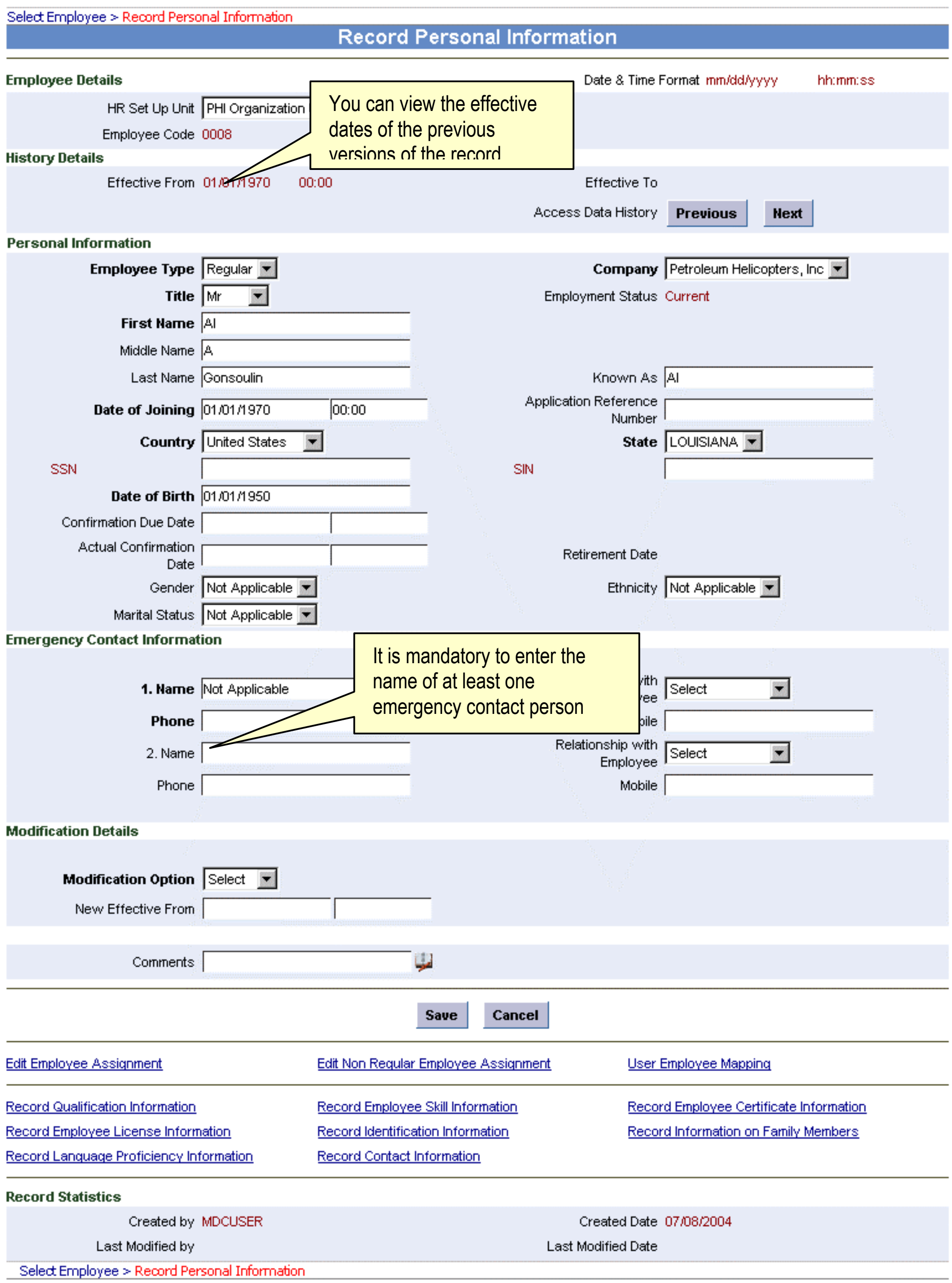

Figure 2.16 Recording personal information of employees

You can use the **History Details** group box, to view the previous versions of the records with their effective dates.

5. Select **Employee Type**, **Company** and **Title** from the **Personal Information** group box.
6. Enter the personal details including the **Name**, **Date of Joining**, **Country**, **State**, **Date of Birth** and Confirmation Date, in the Personal Information group box.
7. Enter **Emergency Contact Information** such as the name of the contact person and phone numbers.
8. You can edit an existing personal information record using either the "Correct" or "Update" Modification Option. If you select the "Correct" option, the system edits the record without changing the effective dates. If you select the "Update" option, you are to enter a new effective "From Date And Time". The existing record then becomes ineffective.
9. Click the **Save** pushbutton to save the information.

Recording qualifications

1. Select the "Record Qualification Details" link from the **Create Employee File**, **Bulk-Create Employee Records** or **Record Personal Information** page. The **Record Qualification Details** page appears. *See Figure 2.17.*

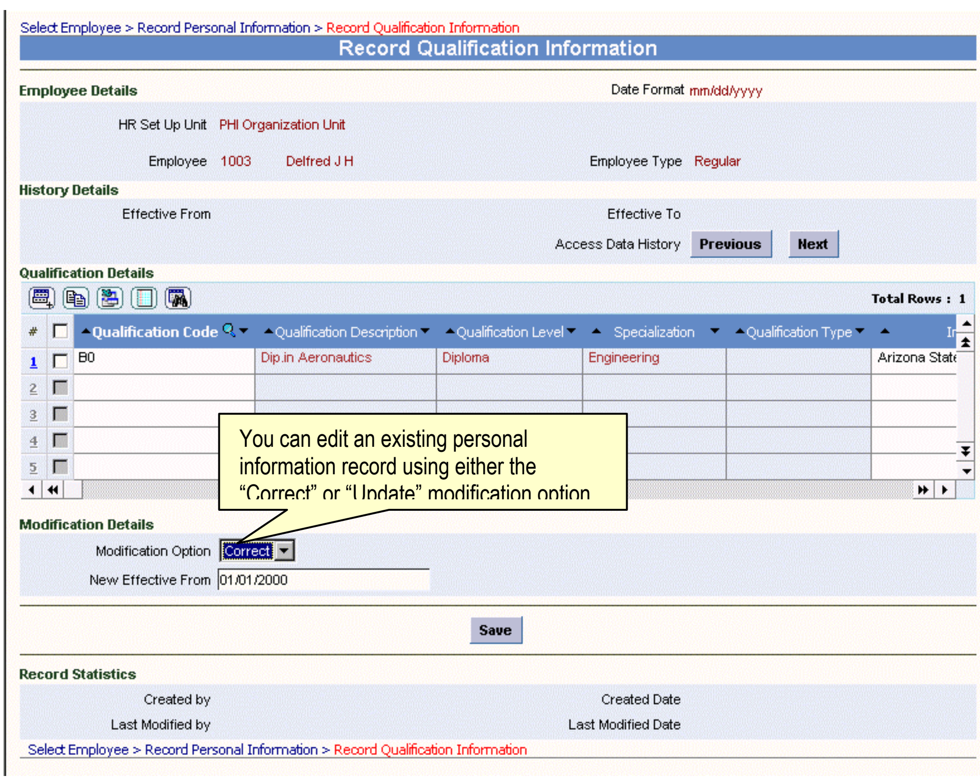

Figure 2.17 Recording employee qualification

2. In the **Qualification Details** multiline, enter the unique **Qualification Code**.

3. From the drop-down list, select the Institutions.

4. Enter other details including GPA score, rank, sponsorship information, importance and the starting and end period of the qualification.

5. You can edit an existing personal information record using either the “Correct” or “Update” modification options. If you select the “Correct” option, the system edits the record without changing the effective dates. If you select the “Update” option, enter a new effective from date and time. The existing record will then become ineffective.

6. Click the **Save** pushbutton to save details.

The **Record Statistics** group box displays details such as name of the person who created the details and date are also displayed.

Recording skills

1. Select the **Record Employee Skill Information** link from the **Create Employee File**, **Bulk-Create Employee Records** or **Record Personal Information** page. The **Record Employee Skill Information** page appears. *See Figure 2.18.*

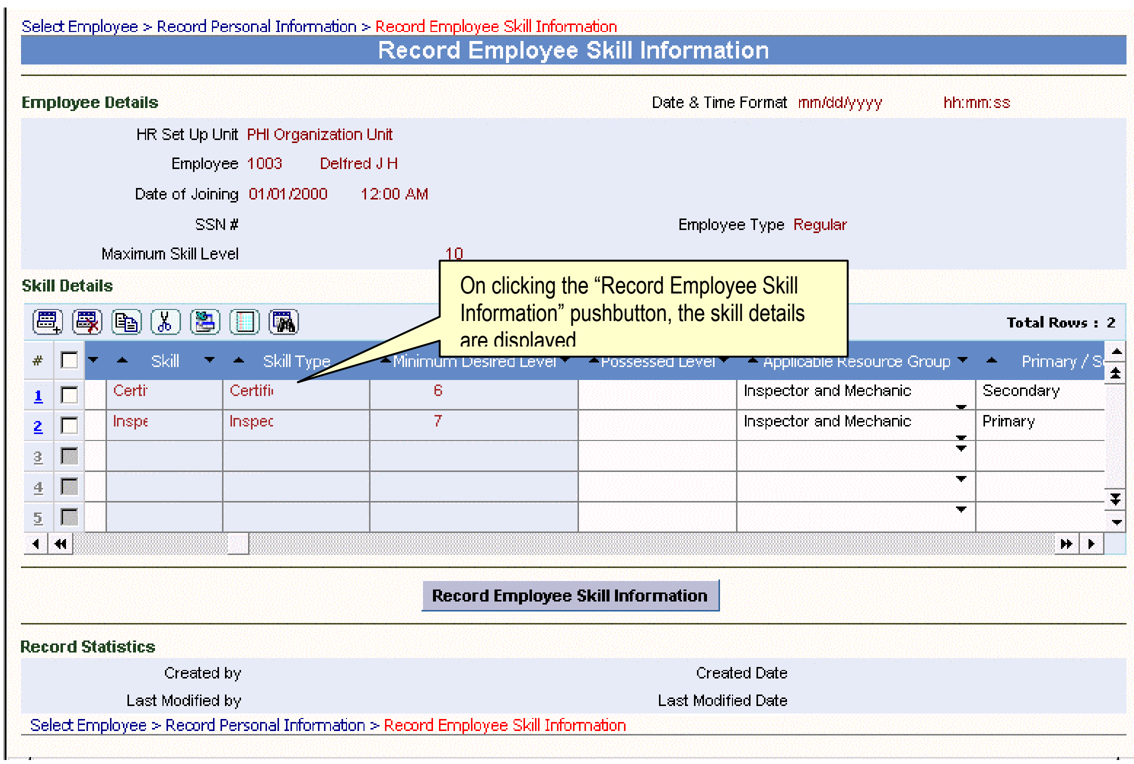

Figure 2.18 Recording employee skill information

You can view the **Employee Code**, **Social Security Number**, **Joining Date**, and **Maximum Skill Level**, in the **Employee Details** group box.

2. In the **Skill Details** multiline, enter a unique skill code to identify the skill.
3. Enter the skill level possessed, and select the applicable resource group.
4. Select the **Record Employee Skill Information** pushbutton to save the details entered.

On clicking the **Record Employee Skill Information** pushbutton, the details such as **Skill Description** and **Skill Rate** are displayed in the **Skill Details** multiline.

The **Record Statistics** group box displays details such as name of the person who created the details and date.

Recording licenses

1. Select the **Record Employee License Information** link from the **Record Personal Information**, **Create Employee File** or **Bulk-Create Employee Records** page. The **Record Employee License Information** page appears. *See Figure 2.19.*
2. In the **Employee Details** group box, you can view the unique employee code, name and type, the social security number and date of joining.
3. Specify the license number, description, category, date of issue, issuing authority and the validity period in the **License Details** multiline.
4. Click on **Edit Employee License Information** pushbutton to save the information.

To record skill details for a license number,

5. Select the **Line #** of the license number.
6. Specify the skill code, license class, object type, aircraft model number/base part number, ATA number, validity period, reference number and remarks, in the **Skill Details** multiline.

Note: Ensure that the validity period specified in the "Skill Details" multiline, is within the validity period specified for the license number in the "License Details" multiline.

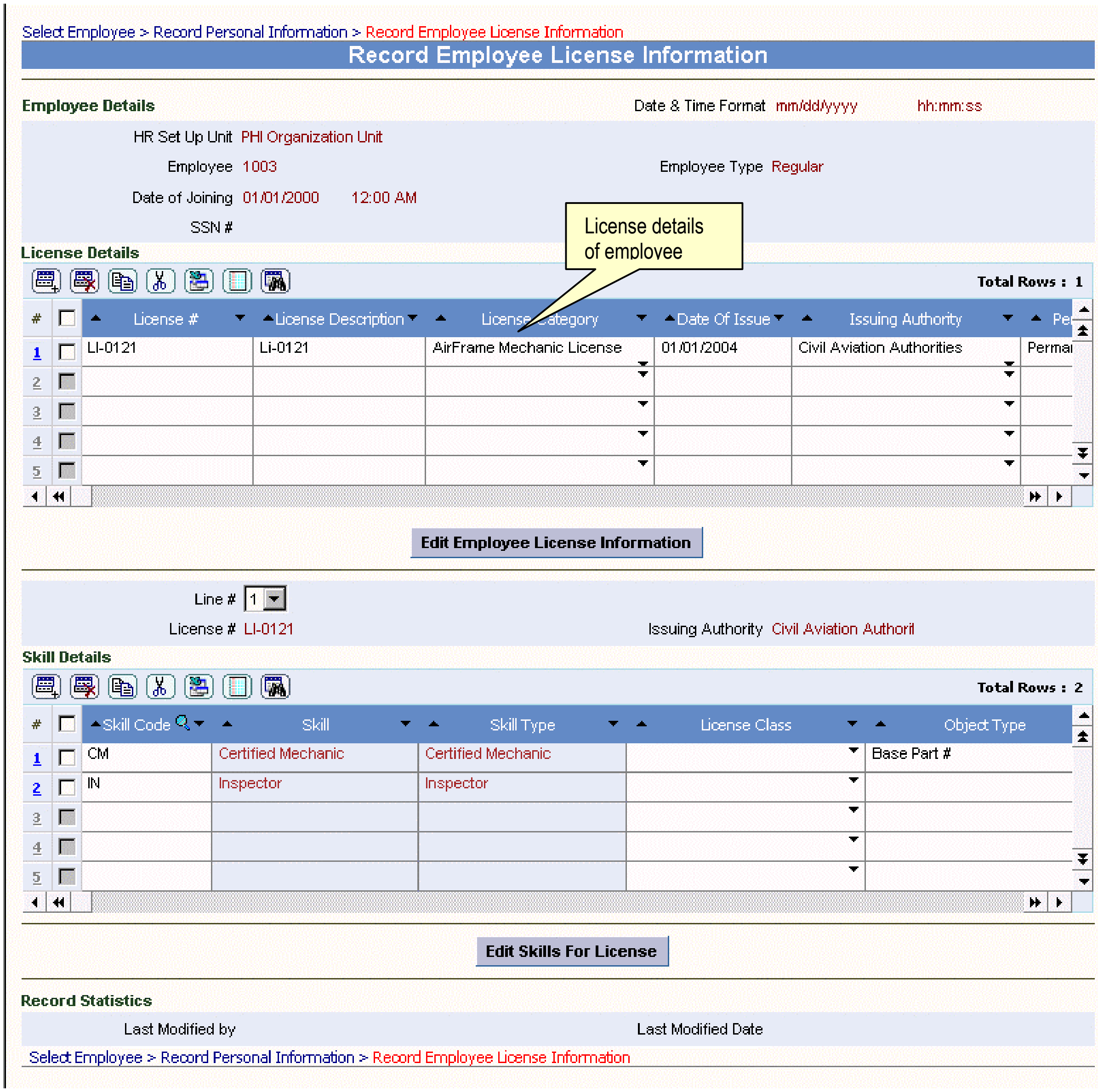

Figure 2.19 Recording employee license information

7. To save the details, click on the **Edit Skills For License** pushbutton. On clicking the pushbutton, the description of the model or the part number, skill description and skill type are displayed in the **Skill Details** multiline.

Recording certification information

When recording certificate information for the first time, use the **Employee File** or **Bulk-Create Employee Records** activity. For future editing, use the **Record Personal Information** activity.

When updating the re-certification information, you can directly edit it through the **Record Re-certification/Currency information** page. The list of certificates or related information cannot be changed; only the re-certification information can be edited.

Recording certification information

1. Select the **Record Employee Certificate Information** link from the **Create Employee File**, **Record Personal Information** or **Bulk-Create Employee Records** page. The **Record Employee Certificate Information** page appears. *See Figure 2.20.*

2. Specify the certificate number of the employee in the **Employee Details** group box.

3. The system displays employee code, employee type, the employee name and the certificate number of the employee in the **Employee Details** group box.

4. In the **Certification Details** multiline, you can specify the certificate number, certificate date, validity period, certificate status and revoke/suspension date.

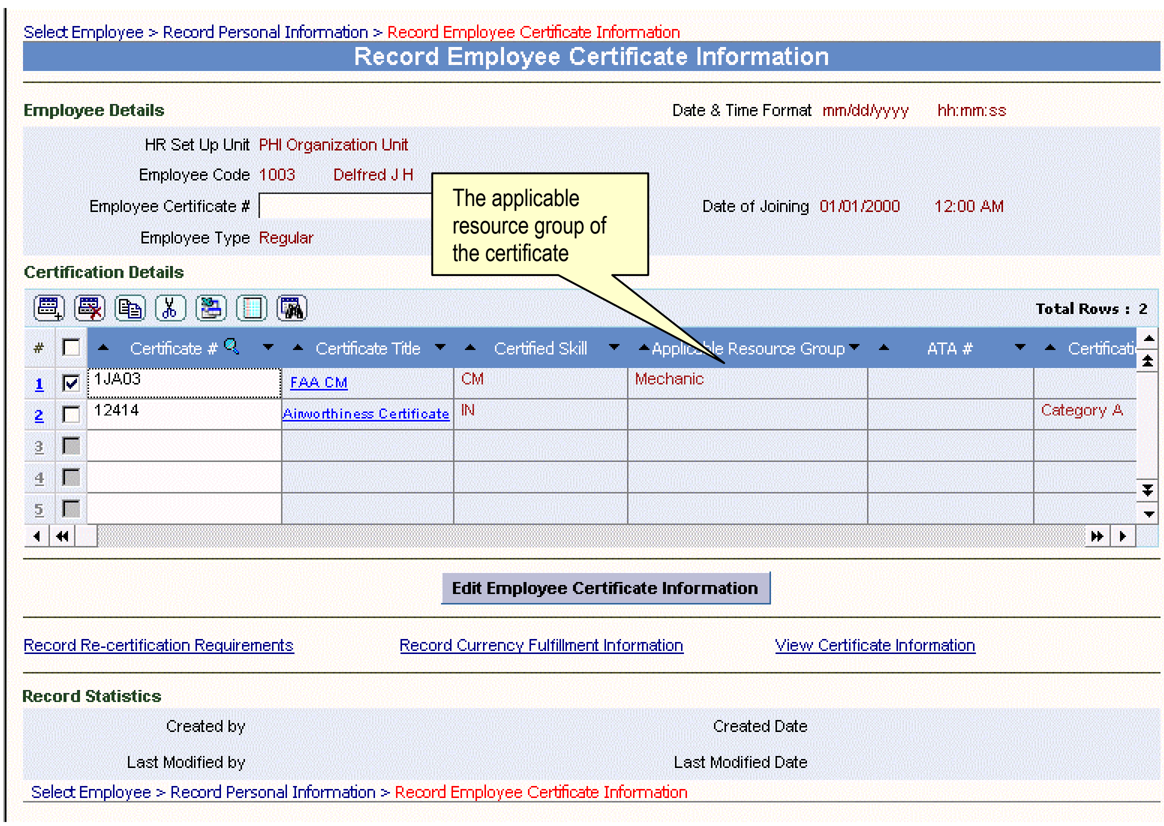

Figure 2.20 Recording employee certification information.

5. Click on the **Record Employee Certificate Information** pushbutton to record the details.

6. You can use the **Record Re-certification Requirements** link at the bottom of the page, to record the re-certification details.

Recording currency fulfillment information

1. Select the **Record Currency Fulfillment Information** link from the **Record Employee Certificate Information** page. The **Record Currency Fulfillment Information page** appears.

2. You can view the employee code, employee type, and social security number of the employee, in the **Employee Details** group box.

3. You can view the certificate number, certificate title, currency period, currency requirements, and currency due date, in the **Certificate Currency Details** group box.

4. Specify the fulfillment date and observation details, in the **Certificate Currency Details** group box.

5. Select the **Record Currency Fulfillment** pushbutton to save the details.

To confirm the details, you can view the fulfillment date, observations and reference number in the **Currency Details** group box.

6. Select the **Confirm Currency Fulfillment** pushbutton to save the details.

Recording re-certification and currency fulfillment

You can update re-certification information directly through the **Record Re-certification/Currency information** page. The list of certificates or related information cannot be changed; only the re-certification information can be edited.

1. Select **Record Re-certification and Currency Information** under the **Employee Information** business component. The **Select Employee** page appears.

2. In the **Search Criteria** group box, specify the search criteria for selecting the employee. The system displays the results of the search in the **Search Results** multiline.

3. Select either the **Record Re-certification Information** or the **Record Currency Fulfillment Information** link at the bottom of the page, depending on the requirement.

Recording re-certification information

Ensure that you are in the “Select Employee” page. To enter the page, see “Recording Re-certification and Currency fulfillment” section.

1. Select the **Record Re-certification Information** link from the bottom of the page. The **Record Re-certification Requirements** page appears.

2. The **Employee Detail** group box displays employee details including the employee type and the social security number of the employee. It also displays the maximum skill level possessed by the employee and the date of joining.

3. The **Certification Details** group box displays certificate number, certificate title, the date from which the certification is valid and the date till which the certification is valid.

4. In the **Re-certification Details** group box, you can specify re-certification date, and the employee who did the re-certification. You can also add comments and observations.

5. Click the **Record Re-certification Requirements** pushbutton to save the details.

6. You can review the re-certification details in the **Re-certification History** group box, and then click the **Confirm Re-certification** pushbutton to save the details.

Mapping employee to user

Use this page to view the user employee mapping.

1. Select the **User Employee Mapping** link from the **Create Employee File**, **Bulk-Create Employee Records** or **Record Personal Information** page. The **User Employee Mapping** appears. *See Figure 2.21.*

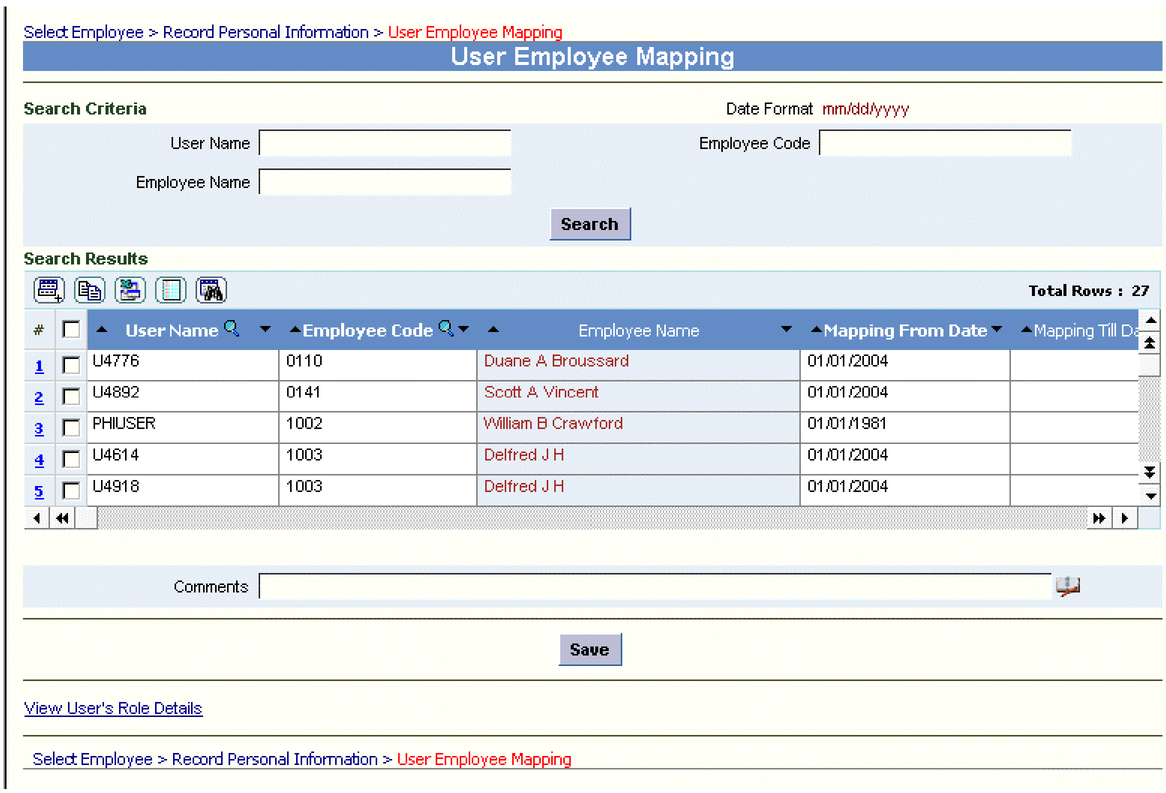

Figure 2.21 User employee mapping

2. Use the **Search Criteria** to view the details of the required employee or user.

The multiline details displayed include the date from which the employee is mapped to the user and the date until which the employee is mapped to the user.

3. You can add comments and then click the **Save** pushbutton to save the details.

Transferring / promoting an employee

You can edit and view the promotion / transfer details of employees. Promotion and transfers are relevant for regular employees only.

Recording transfer / promotion of an employee

1. Select **Record Employee Assignment** under the **Employee Information** business component. The **Select Employee to Record Assignment** appears.
2. Use the **Employment Unit** drop-down list to select the employment unit.
3. You can either enter the employee code directly or retrieve the employee record through a search.
4. Click on the **Edit Assignment** link. The **Edit Assignment** page appears. *See Figure 2.22.*
5. In the **Assignment/Promotion/Transfer/Separation** group box, specify whether the employee moves in transfer or promotion, the reason for the promotion / transfer of the employee and the date on which the employee is promoted / transferred.
6. Click the **Edit Assignment** pushbutton to save the details entered.

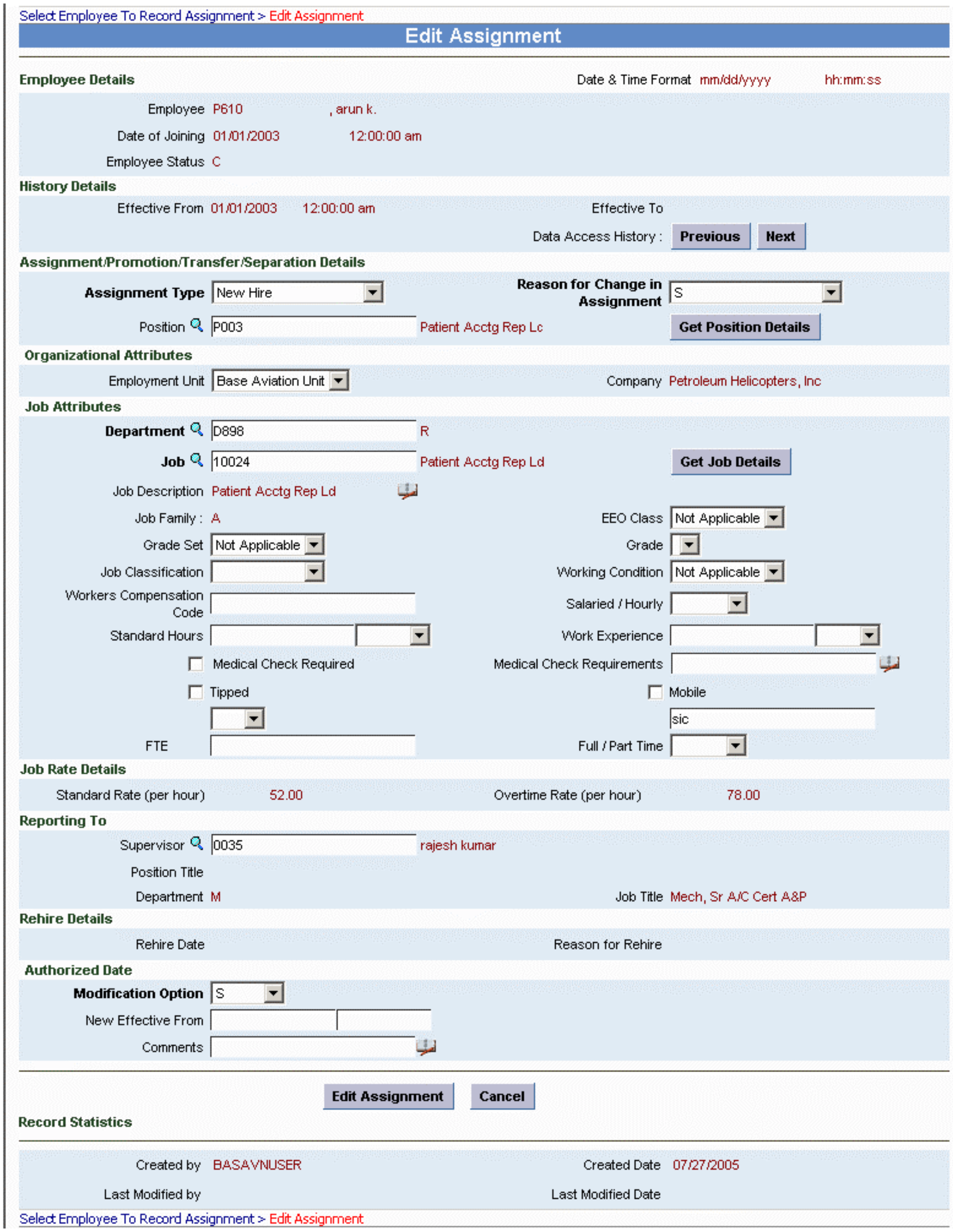

Figure 2.22 Transferring, promoting, rehiring employees

Separating an employee

You can record employee separation details such as the dates of separation and reason for separation. You can also specify whether the separation is due to retirement, resignation or termination. Separation is applicable to all employees.

Recording employee separation

1. Select **Record Employee Assignment** under the **Employee Information** business component. The **Select Employee to Record Assignment** appears.
2. Use the **Employment Unit** drop-down list to select the employment unit.
3. You can either enter the employee code directly or retrieve the employee record through a search.
4. Click on the **Edit Assignment** link. The **Edit Assignment** page appears. *See Figure 2.22.*
5. In the **Assignment/Promotion/Transfer/Separation** group box, choose the separation type. Indicate whether the separation is due to retirement, termination or resignation.
6. Specify the reason for which the employee quit the organization; the reason must be from both the employee's and employer's point of view.
7. Click the **Edit Assignment** pushbutton to save the details entered.

Rehiring an employee

You can edit the rehiring details of employees. If the employee had been previously employed with the organization and is rehired, his or her employee code and personal information can be retained' only the employee assignment is updated and the employment status changed to 'Current'.

Recording rehiring details

1. Select **Record Employee Assignment** under the **Employee Information** business component. The **Select Employee to Record Assignment** appears
2. Use the **Employment Unit** drop-down list to select the employment unit.
3. You can either enter the employee code directly or retrieve the employee record through a search.
4. Click on the **Edit Assignment** link. The **Edit Assignment** page appears. *See Figure 2.22*.
5. In the **Rehire Details** group box, enter the date and reasons for rehire.
6. Click the **Edit Assignment** pushbutton to save the details entered.

See Figure 2.23. to know the relationship between Employee Record Management and Time Management. The Time Management Business Process is explained in the next chapter.

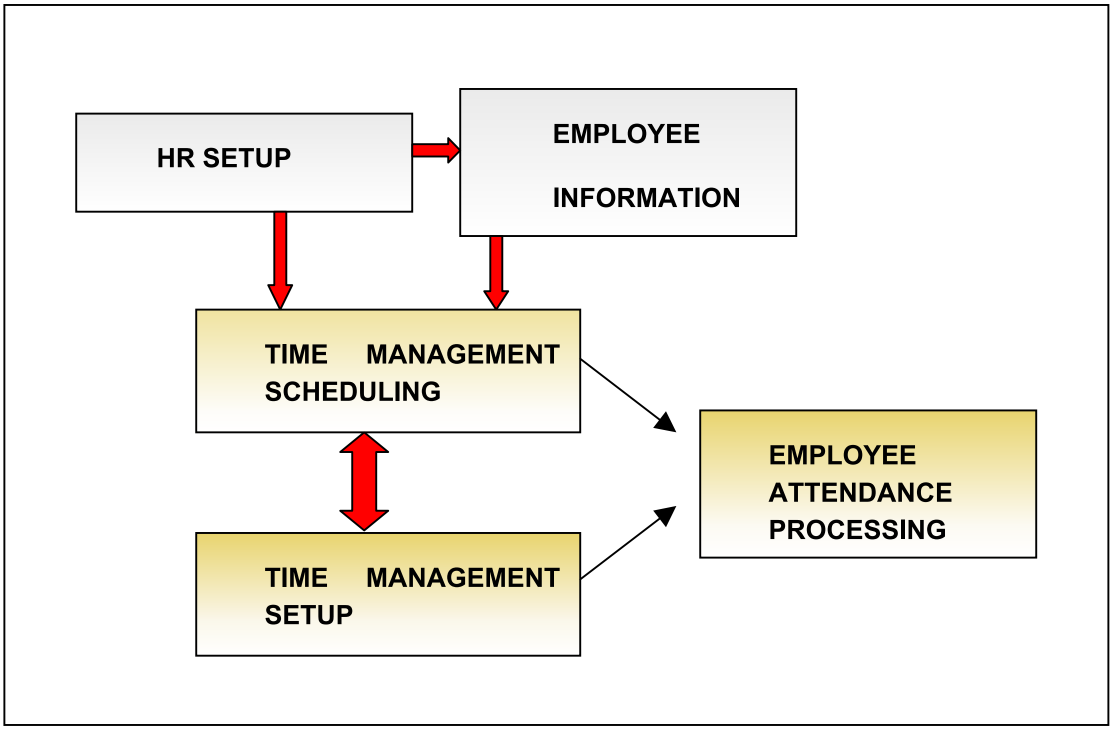

Figure 2.23 Component interaction

Chapter 3/Time Management

Time Management aims at optimizing the available resources, to fulfill the business needs of the organization. To optimize manpower, resource scheduling and resource managing must be carried out. A second vital aspect of Time Management is recording and computing the employee's attendance and overtime. The attendance outputs are used to calculate the employee's payroll and reimbursement, besides being used to analyze the employee's availability.

The **Time Management Setup** business component enables you to define shifts and holidays

The **Time Management Scheduling** business component enables you to create and manage schedules for employees.

The **Employee Attendance Processing** enables you to compute the employees' attendance and overtime.

Defining shifts and holiday masters

Shifts and holidays are the foundation of employee scheduling. In other words, they are the time segments of which every employee's schedule consists.

You are to define each shift in the organization uniquely, and enter its start and end timings.

You are to also define the holiday master uniquely, and list the holidays under it; the date and holiday name are entered. The period for which the holiday master is applicable must be entered, as well.

Creating a holiday master

1. Select the **Maintain Holiday Master** from the left pane in the **Time Management Setup** component. Select the **Create Holiday Master** link, from this page. The **Create Holiday Master** page appears. *See Figure 3.1.*

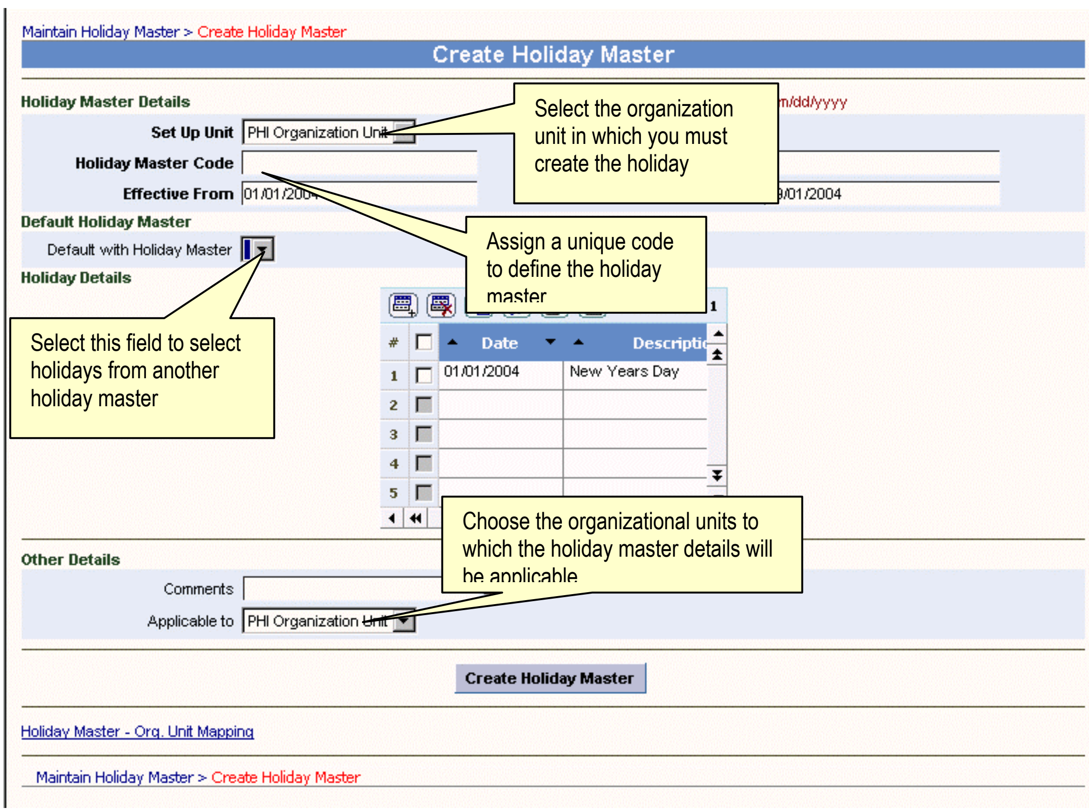

Figure 3.1 Creating Holiday Master

2. Use the **Setup Unit** drop-down box to select the organization unit in which you must create the Holiday Master.

3. Enter the start date of the period from which the list of holidays will be valid, in the **Effective From** field. Enter the end date of the period until which the list of holidays will be valid, in the **Effective To** field.

4. To use holidays from another holiday master, select the **Default with Holiday Master** field. The drop-down list box displays the list of holiday masters that have been defined for the organization so far.

5. To enter a new holiday, enter the date of the holiday and the holiday name, in the **Date** and **Description** fields in the multiline.

6. Choose the organizational units to which the holiday master details will be made available, by selecting the units from the **Applicable To** drop-down box.

Creating Shift

1. Select **Maintain Shift Master** from the left pane of the **Time Management Setup** business component. Select the **Create Shift Master** link, from this page. The **Create Shift** page appears. *See Figure 3.2.*

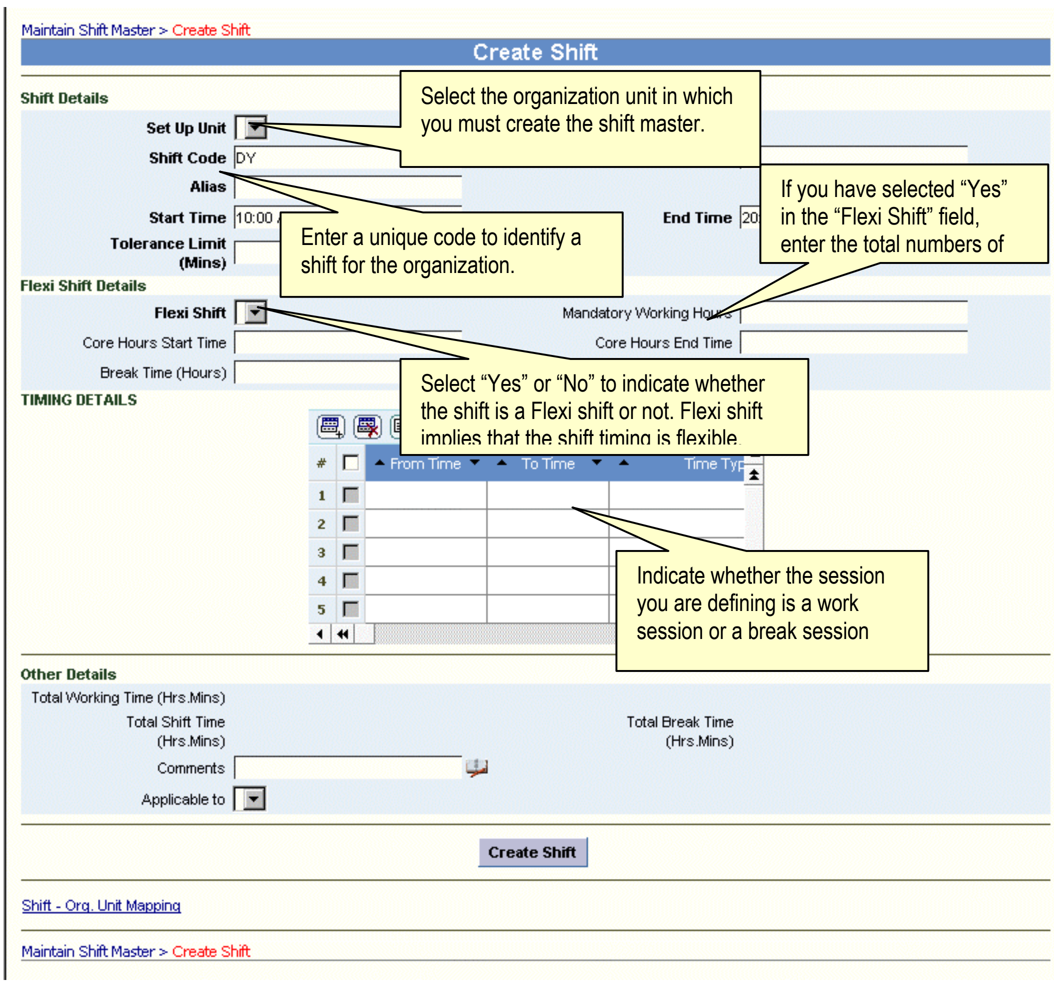

Figure 3.2 Creating a Shift

2. Use the drop-down list box to select the organization unit in which you must create the shift master.

3. Enter a unique code to identify a shift for the organization.

4. From the **Flexi Shift** drop-down list box, select “Yes” or “No” to indicate whether the shift is a Flexi shift or not. Flexi shift implies that the shift timing is flexible.

5. If you selected “Yes” in the **Flexi Shift** field, enter the total numbers of hours the employees must compulsorily contribute, for a day, in the **Mandatory Working Hours** field.

6. Instead of entering the **Mandatory Working Hours** field, you can enter the **Core Hours Start Time** and **Core Hours End Time** fields.

7. Select the “Save” **pushbutton**.

Creating and managing schedules for employees

You are to define schedules for specific categories of employees such as Managers, Clearing Staff and Maintenance Crew, and apply the schedules to the individual employees under the category. *See Figure 3.3* to view the diagrammatic representation of how employee schedules can be created.

To make this possible, you are to first define a rota plan. This is a broad-based plan, consisting of

- The complete list of shifts applicable to this set of employees
- A holiday master
- The complete list of rules and regulations that will govern attendance and overtime for these shifts and holidays

From the rota plan, you are to create a rota schedule, in which you select shifts from the rota plan, sequence them and enter the number of days for which each shift is applicable. The shifts in the rota schedule are therefore according to a prescribed sequence, and cyclic. Cyclic refers to the sequence of shifts being continuously repeated throughout the effective period of the rota schedule, for the employees who will be attached to the rota schedule. A rota schedule is valid for the given period.

After the rota schedule is created, you are to attach or map employees to it.

Just as you created rota schedules, you can create adhoc schedules, where shifts are sporadically assigned to the days of a given month. Unlike rota schedule, it does not require a seamless assigning of schedules across all the days of the month; it is also not cyclic. Employees are mapped to the adhoc schedule.

For the employees mapped to the rota and ad hoc schedules to actually inherit these schedules, you are to request the system to generate the schedule for the employees. The system executes a batch process, to assign the employee the schedule to which he or she is mapped. The output of generating the employee schedule is the employee timetable. You can now view the employee timetable; this shows you the employee's availability and his or her scheduled shift versus actual shift details.

You can enter the leave details of the employee, as well as define leave rules through stored procedures. Additionally, you can enter the deviation in the timings within an employee's shift, and deviations from one shift to another. When you generate the employee timetable next, the system updates it with the employee's leave and deviation details as well.

Note: All shift and time deviations that you enter will be accepted by the system, provided they are in conformance with the attendance rules specified in the rota plan from which the employee's rota schedule was created.

Because the system is updated with every employee's availability, it can assist you in identifying a substitute when an employee is absent for a length of time. Therefore, identifying a substitute employee comes within the purview of Time Management.

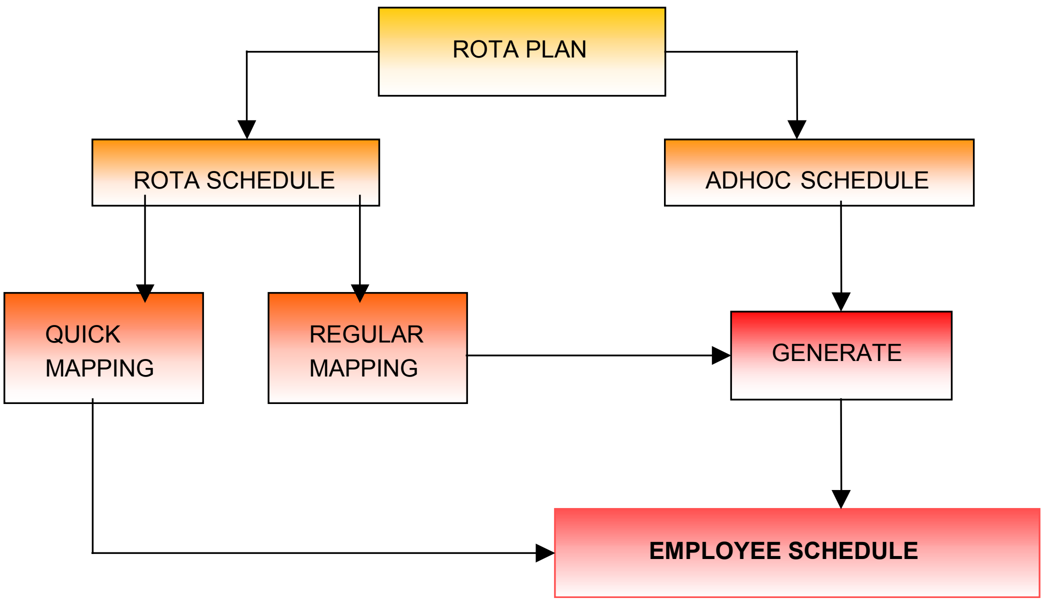

Figure 3.3 Creating Employee Schedule

Creating a rota plan

1. Select the **Create Rota Plan** from the left pane of the **Time Management Scheduling** business component.

2. Select the Scheduling unit and the Employment unit from the relevant drop-down boxes, and click on the **Create Rota Plan** link. The Create Rota Plan page appears. *See Figure 3.4.*

3. Enter a unique code to identify the Rota Plan under the Rota Plan code.

4. Enter the code of a holiday master, to include the holidays contained in this holiday master in the schedule of the employees who will be mapped to the Rota Plan.

5. Indicate whether the shifts must be scheduled on the holidays contained in the Holiday Master, by choosing "Yes" or "No" from the drop-down list box.

6. Enter the shift code of each shift of which the Rota plan should be part.

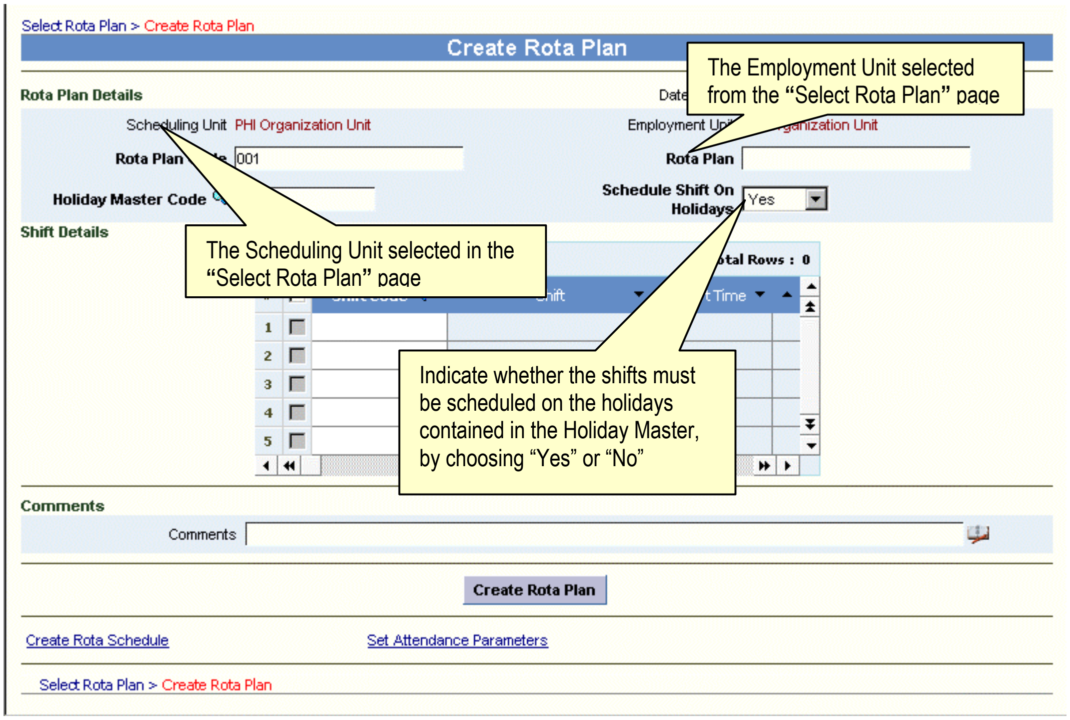

Figure 3.4 Creating a Rota Plan

7. After selecting all the shifts you need, click the **Create Rota Plan** pushbutton.

Set Attendance Parameters

1. Select the **Set Attendance Parameters** link from the **Create Rota Plan** screen. The **Set Attendance Parameters** page appears. *See Figure 3.5.*

The date format, scheduling unit and employment unit from the previous page are displayed.

2. Check the **FLSA** box to indicate that attendance and leave will be calculated only according to FLSA.

3. Indicate whether deviations from the shift are allowed, by selecting either "Allowed" or "Not Allowed".

4. Indicate whether deviations in the timings of the shift are allowed. Choose one of the three values in the drop-down list box: "Not Allowed", "With Relaxed Hours" or "With Fixed Hours".

5. When an employee works on holiday, indicate whether it must be calculated as "Compensatory Off" or "Overtime Payment".

6. The number by which the employee's overtime hours must be multiplied, to arrive at the payable hours for the employee.

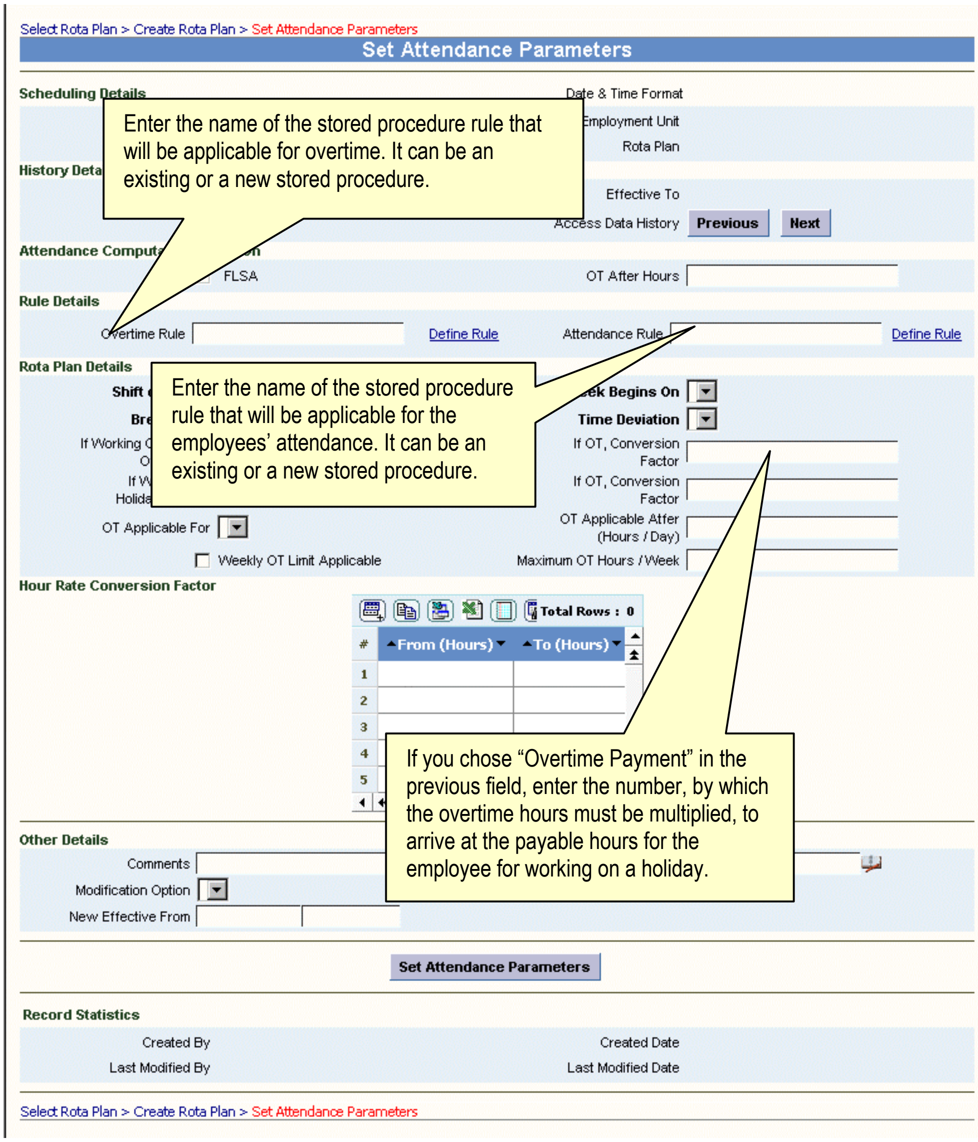

Figure 3.5 Setting Attendance Parameters

7. Click on the **Set Attendance Parameters** pushbutton.

Creating a rota schedule

1. Select **Create Rota Schedule** from the left pane of the **Time Management Scheduling** business component. The **Select Rota Schedule** page appears. *See Figure 3.6.*

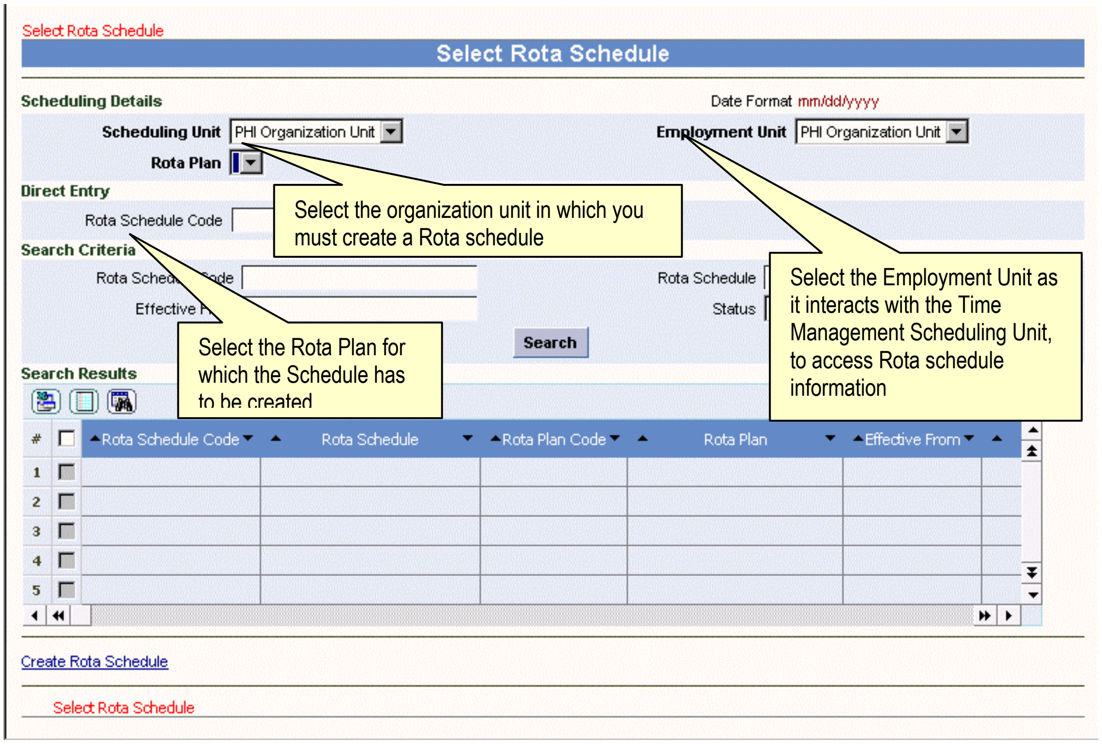

Figure 3.6 Selecting a Rota Schedule

2. Select the Scheduling Unit, Employment Unit and the Rota Plan from the relevant drop down boxes and select the **Create Rota Schedule** link at the end of the page. The **Create Rota Schedule** page appears. *See Figure 3.7.*

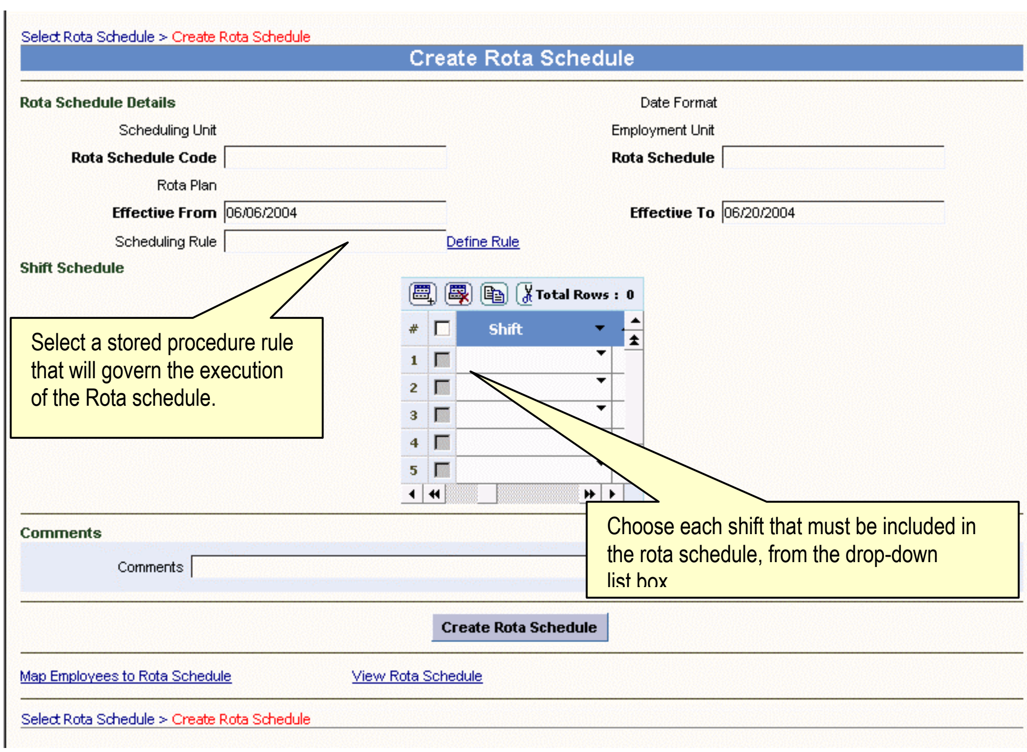

Figure 3.7 Creating a Rota Schedule

3. Enter a unique code to identify the Rota schedule under the **Rota Schedule Code** field.

4. Choose each shift that must be included in the Rota schedule, from the drop-down list box.

5. Enter the number of days each shift will occur in the schedule, before the next shift starts.

6. Click on the **Create Rota Schedule** pushbutton to create the schedule.

Creating / mapping / maintaining an adhoc schedule

1. Select **Set Adhoc Schedule** from the left pane of the **Time Management Scheduling** business component. The **Set Adhoc Schedule** page appears. *See Figure 3.8.*

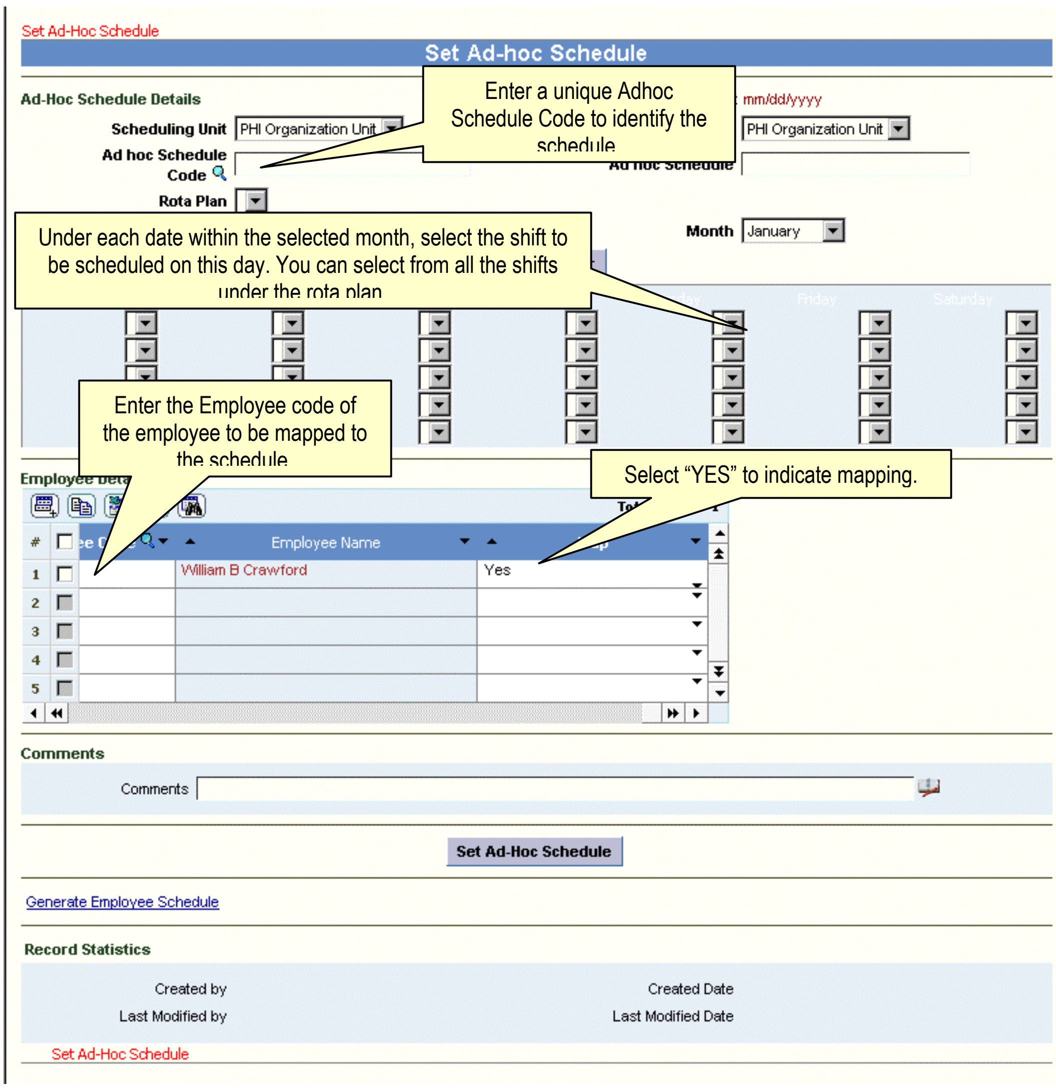

Figure 3.8 Setting Adhoc Schedule

2. Select the Time Management Scheduling unit and the Employment unit from the relevant drop-down boxes.

3. Enter the Adhoc Schedule code, which is a unique code to identify the Adhoc schedule.

4. Select the code of the Rota plan from which you want to choose shifts for the Adhoc schedule.

5. Select the **Display Calendar** pushbutton. The **Display Calendar** multiline displays a typical calendar, with dates and all the days of the week, from Sunday to Saturday.

6. From the drop-down list box under each date within the selected month, select the shift to be scheduled on this day. You can select from all the shifts under the Rota plan

7. To map the employees to the Adhoc schedule, enter the employee code of each employee to be mapped to the Adhoc schedule.

8. Select “Yes” to indicate mapping.

9. Select the **Set Adhoc Schedule** pushbutton.

Note: Creation, Mapping and Maintenance are done in the same screen.

Mapping employees to a rota schedule

1. Select **Employee – Rota Schedule Mapping** from the left pane of the **Time Management Scheduling** business component. The **Map Employee Rota Schedule** page appears. *See Figure 3.9.*

2. Select the Time Management Scheduling unit and the Employment unit from the relevant drop-down boxes.

3. Select the code of the Rota Schedule under which the employees are to be mapped or associated.

4. Enter the Employee code of the employee, who is to be mapped to the rota schedule.

5. Indicate whether the employee must be mapped to the rota schedule, by selecting “Yes” or “No”.

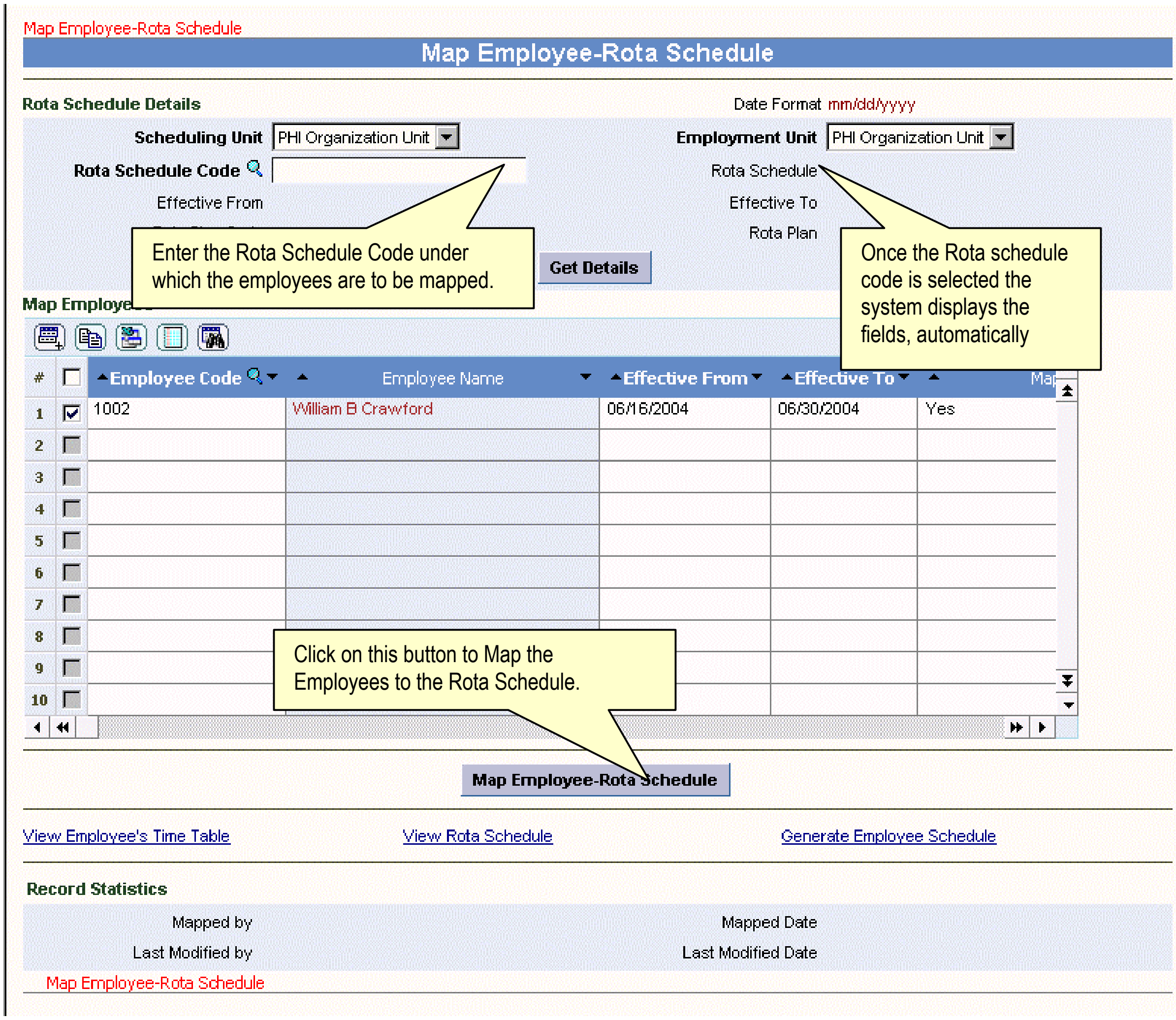

Figure 3.9 Map Employee –Rota Schedule

6. Click on the **Map Employee-Rota Schedule** pushbutton, to map the employee to the schedule.

Record deviation in shift timings

1. Select **Record Employee Time Deviation** from the left pane of the **Time Management Scheduling** business component. The **Record Employee Bulk Time Deviation** page appears. *See Figure 3.10.*

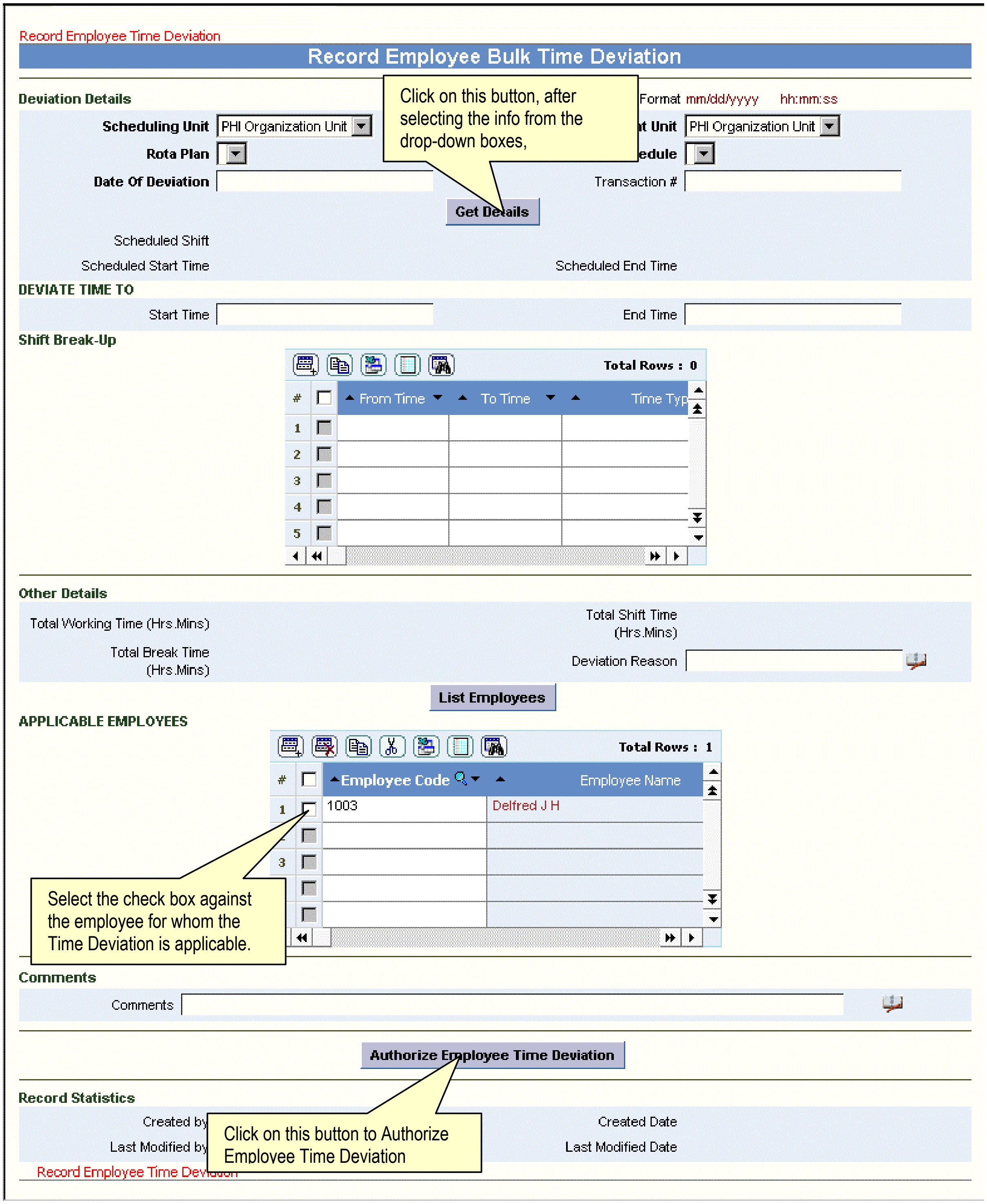

Figure 3.10 Record Employee –Time Deviation

2. Select the Scheduling Unit, Employment Plan, Rota Plan, and Rota Schedule from the relevant drop-down boxes.

3. Select the **Get** pushbutton, for the system to display the “Scheduled Shift on Deviation Date”, “Scheduled Start Time” and “Scheduled End Time”.

4. Select the **List Employees** push button and the system displays the details of the employees who are mapped to the selected Rota Schedule.

5. Select the checkbox against the employee(s) for whom the time deviation must be made applicable.

6. Click the **Authorize Employee Time Deviation** pushbutton, to record the time deviation for the employees.

Record a deviation in shift

1. Select **Record Employee Shift Deviation** from the left pane of the **Time Management Scheduling** business component. The Record Employee Shift Deviation page appears. *See Figure 3.11.*

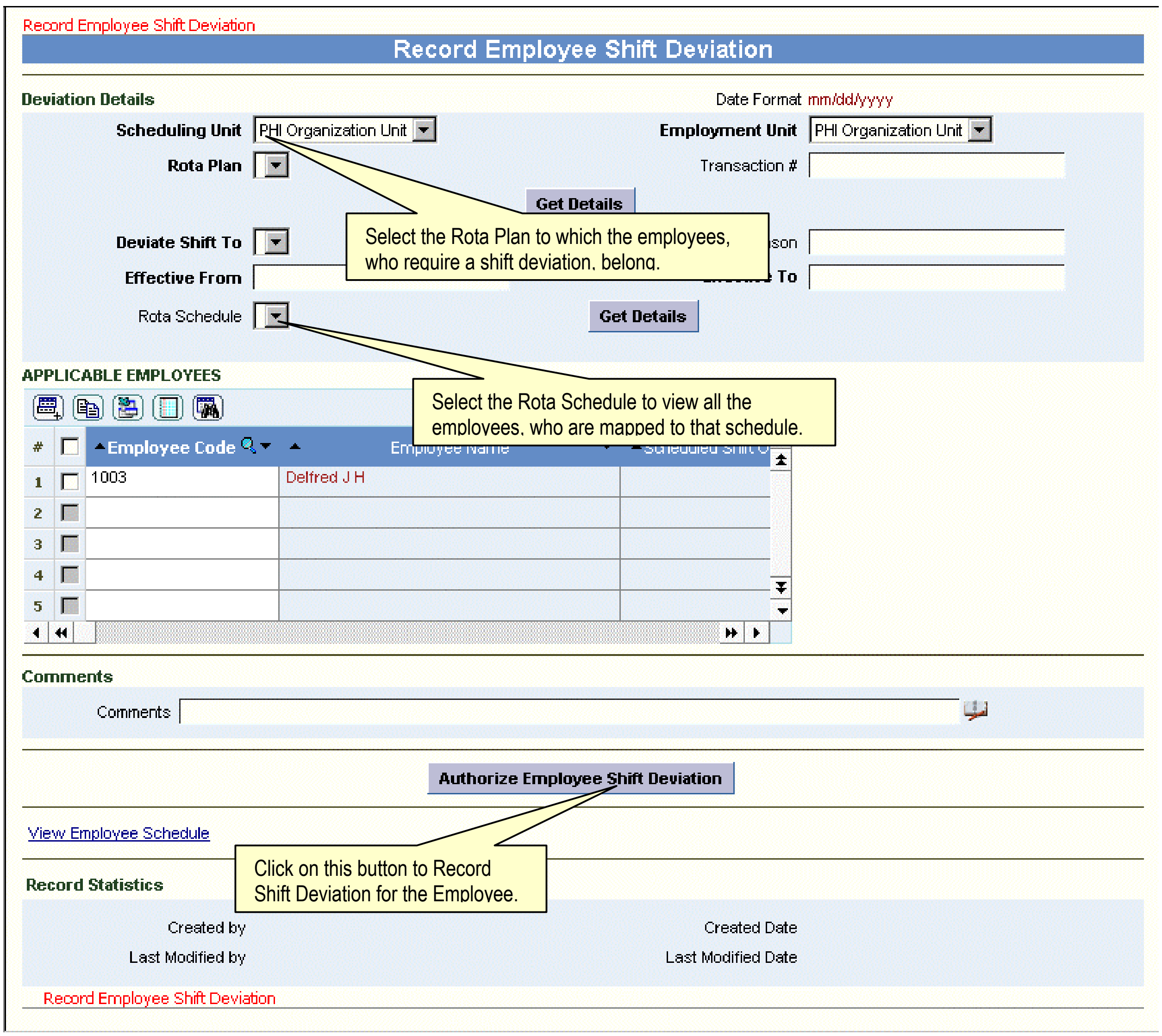

Figure 3.11 Record Employee –Shift Deviation

2. Select the **Scheduling unit**, **Employment unit** and the **Rota Plan** from the respective drop down boxes and click on the **Get Details** pushbutton.

3. Select **Deviate Shift To** from the drop-down box. Enter the **Effective From** and Effective dates in the text box provided.

4. Select the employees to whom the shift deviation should be made applicable.

5. Click on the **Authorize Employee Shift Deviation** pushbutton, to authorize the employees for whom the shift deviation is made applicable.

Maintain employee leave

1. Select **Maintain Employee Leave** from the left pane of the **Time Management Scheduling** business component. The **Maintain Employee Leave** page appears. *See Figure 3.12.*

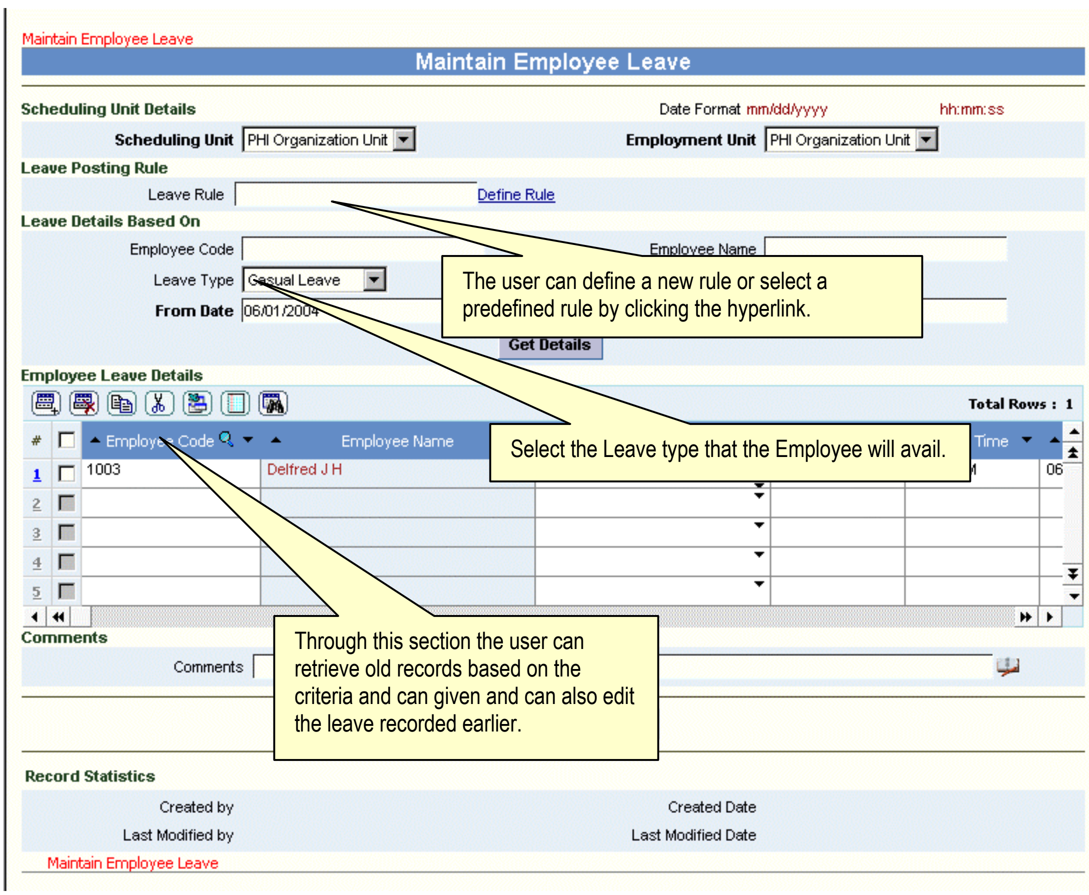

Figure 3.12 Maintain Employee Leave

2. Select the **Scheduling Unit** and the **Employment unit** from the relevant drop-down boxes

The facility to define a new leave (The Leave Rule is used to check the entitlement of each of the employees) rule is provided. If the user wants to use a predefined leave rule, the Search facility can be used to retrieve the desired leave rule.

3. Enter the Employee details, select the **Leave type** from the drop-down box and click on the **Maintain Employee Leave** pushbutton.

4. In the case of multiple employees, enter the employee details in the multiline provided and select the Leave type. Click on the **Maintain Employee Leave** pushbutton.

Note: The Batch Process has to be run periodically to keep the Employee Schedules in sync after the following tasks,

- *Rota Plan changes*
- *Rota Schedule changes*
- *Employee Mapping changes*
- *Unscheduled Holiday / Working day changes*

Computing employee attendance and overtime

You can record each employee's attendance. You can also request the system to process the attendance and overtime hours recorded by the employee. Processing refers to taking into account the attended hours of the employee and applying the attendance rules and regulations defined for the rota plan from which the employee's rota schedule is derived. The output from this component is used to calculate the employee's, payroll and reimbursement

You can view the status of attendance processing for an individual employee, or for a date range.

Attendance entry

1. Select **Enter Attendance** from the left pane of the **Employee Attendance Processing** business component. The **Attendance Entry-Employee Wise** page appears. *See Figure 3.13.*

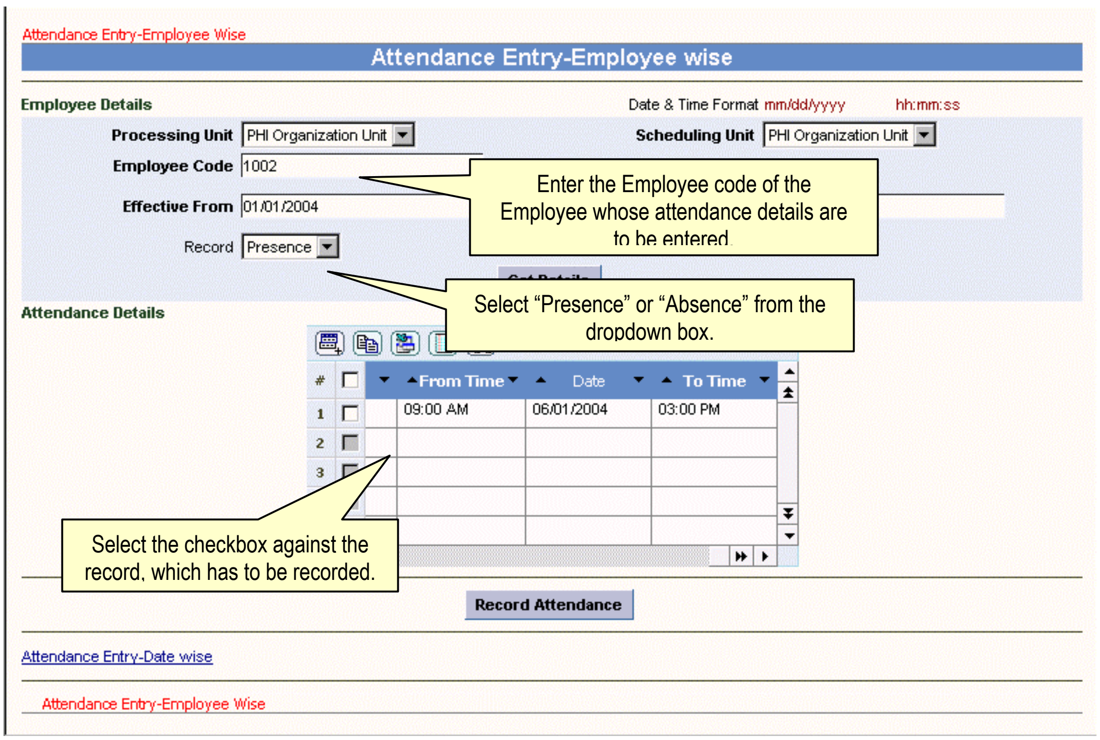

Figure 3.13 Attendance Entry

2. Select the **Processing Unit** and the **Scheduling Unit** from the relevant drop-down boxes.

3. Enter the employee code of the employee whose attendance details must be entered.

4. Enter the **Effective From** and **Effective To** dates from which the recording of the attendance starts and ends.

5. Select the appropriate option from the **Record** drop-down box.

- If "Presence" is selected from the **Record** drop-down box

1. Enter the date on which each start time of the employee's attendance falls.

2. Enter the start time of each attendance.

3. Enter the end time of each attendance.

4. Click on the **Record Attendance** pushbutton to save the details entered.

- If "Absence" is selected from the **Record** drop-down box.

1. Enter the date of the scheduled shift for which the employee is absent.

2. Click on the **Record Attendance** pushbutton to save the details entered.

Note: The system will create the attendance records of the employee for all the dates between "Effective From" and "Effective To", except the dates you specified in the "Date" field in the "Attendance Details" multiline

Processing employee attendance

1. Select **Process Employee Attendance** from the left pane of the **Employee Attendance Processing** business component. The **Process Employee Attendance** page appears. *See Figure 3.14.*

2. Select the **Processing Unit**, **Scheduling Unit** and the **Rota Plan** from the relevant drop-down list boxes.

3. Enter the date from which the employee attendance must be processed.

4. Enter the date until which the employee attendance must be processed.

5. Click the **Get Details** pushbutton, to get all the schedules under the plan selected with the employees mapped to it in the specific period.

6. Check the "Select" box in the **Rota Schedules** multiline, to indicate the rota schedule for which employee attendance is to be processed.

7. Select the **Save Parameters for Processing** pushbutton, to save the parameters entered.

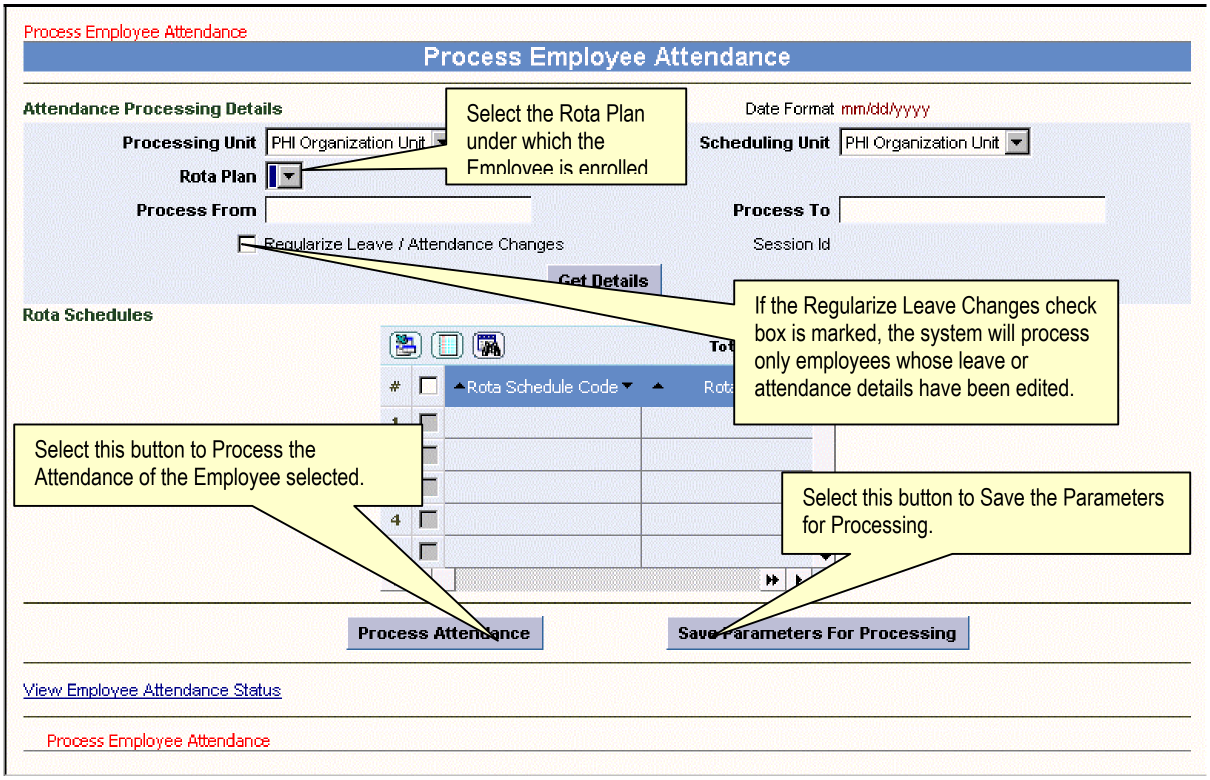

Figure 3.14 Process Employee Attendance

8. Select the **Process Attendance** pushbutton, to process the records.

Note: The system displays the following – A session id uniquely identifying the processing carried out on a specified set or batch of employee attendance records. This unique ID is necessary when more than one batch of records is being processed simultaneously. A batch of records cannot be processed without a session ID.

Authorizing employee attendance

1. Select **Authorize Attendance** from the left pane of the **Employee Attendance Processing** business component. The **Authorize Attendance** page appears. *See Figure 3.15.*

2. Select the **Processing Unit**, **Scheduling Unit** and the **Rota Plan** from the relevant drop-down boxes.

3. The rota schedule list gets populated, once the rota plan is selected. Select the rota schedule, to authorize the attendance for the records of employees mapped to a rota schedule under the rota plan.

4. Enter the date from which the system must retrieve the processed employee records, for authorization.

5. Enter the date until which the system must retrieve the processed employee records, for authorization.

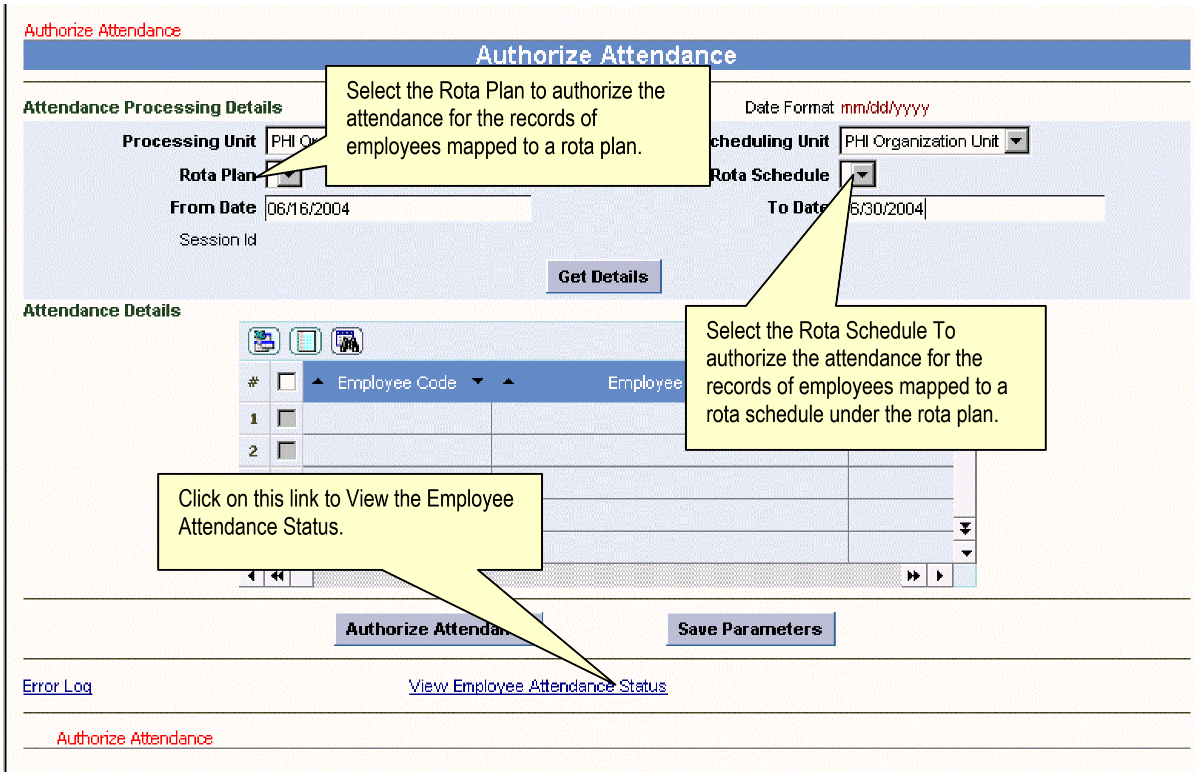

Figure 3.15 Authorize Employee Attendance

6. Select the **Get Details** pushbutton.

The system displays the **Employee Code**, **Name** and **Attendance Unit** in the multiline.

7. Select each employee-assignment combination for which the processed attendance must be authorized. To select, check the “Select” box in the multiline record that pertains to the employee-assignment record.

8. Click on the **Save Parameters** pushbutton.

The system displays the session ID, which uniquely identifies the batch of employee attendance records for which authorization is being carried out. This unique ID is necessary when more than one batch of records is being authorized simultaneously.

9. Click on the **Authorize Attendance** pushbutton.

The facility to view the Employee Attendance status and the Error Log are also provided within this screen.

Note: If a minimum of one attendance record has been processed for the specified authorization date range, no error is displayed although the other attendance records are unprocessed.

Processing employee overtime

1. Select **Process Employee Overtime** from the left pane of the **Employee Attendance Processing** business component. The **Process Employee Overtime** page appears. *See Figure 3.16.*

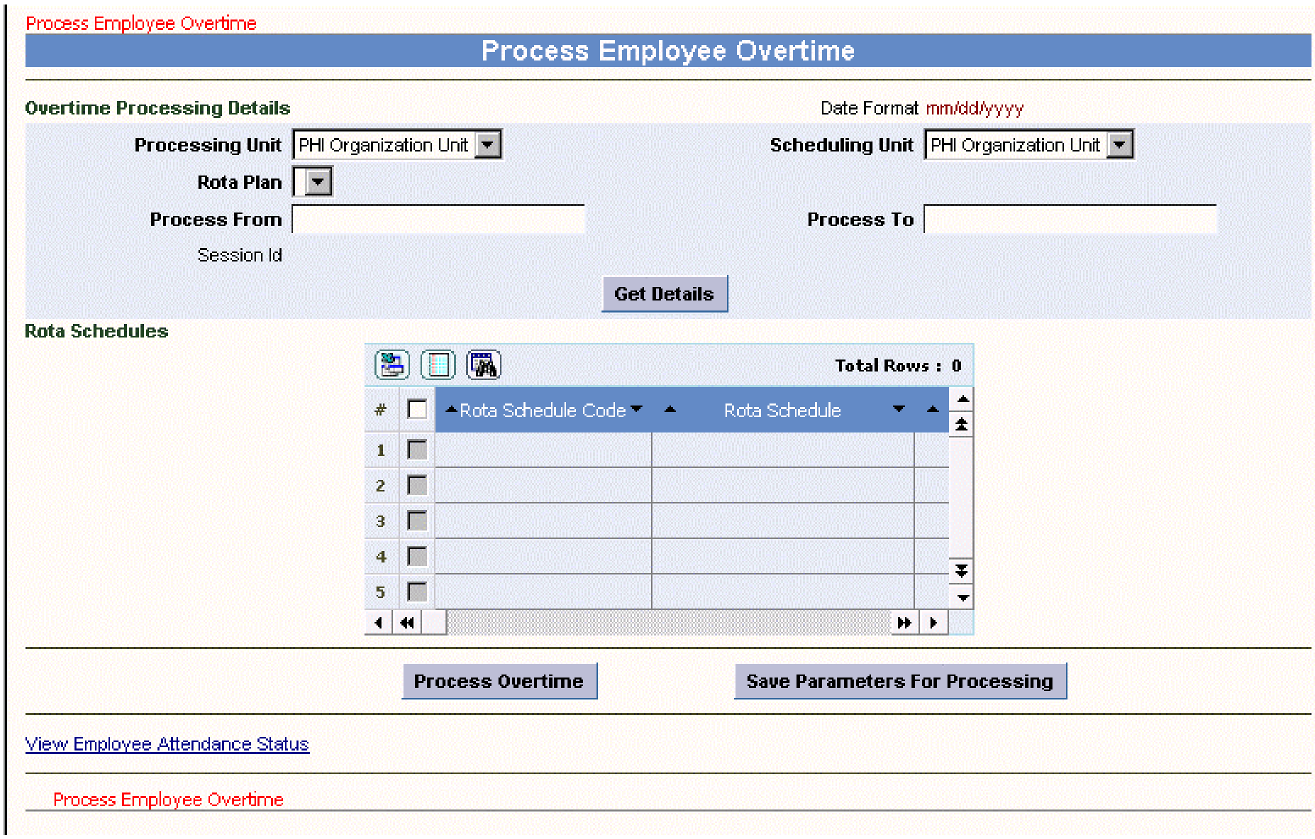

Figure 3.16 Process Employee Overtime

2. Select the **Processing Unit** and the **Scheduling Unit** from the relevant drop-down boxes.

3. To process the overtime of the employees under a specific rota plan, select the rota plan from the drop-down list box.

4. Enter the date from which the employee overtime has to be processed and the date until which it has to be processed.

5. Select the **Get Details** pushbutton.

The **Rota Schedules** multiline displays the rota schedules that have at least one authorized attendance record available.

6. Check the “Select” box in the **Rota Schedules** multiline, to indicate the Rota schedule for which employee overtime is to be processed.

7. Select the **Save Parameters** pushbutton, to save the parameters entered.

8. Select the **Process Overtime** pushbutton, to process the records.

Note: When the Save parameters pushbutton is selected, the system displays the following, "Session ID". The session ID uniquely identifies the processing carried out on a specified set or batch of employee overtime attendance records. This unique ID is necessary when more than one batch of records is being processed simultaneously. You cannot process a batch of records without a session ID.

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