Simply Personnel
Personnel Manager

Company Details,
Business Rules & System Parameters

Simply Personnel: Company Details, Business Rules & System Parameters

This document provides step-by-step guide for users to give an easy understanding on setting up the Company Details, Business Rules and system parameters on to your system.

If at any time you need help or just need some questions answered please use our on-line helpdesk at www.simplypersonnel.co.uk an option to open a support ticket.

Thank you

The Simply Personnel Team.

Setting up you Company Details:

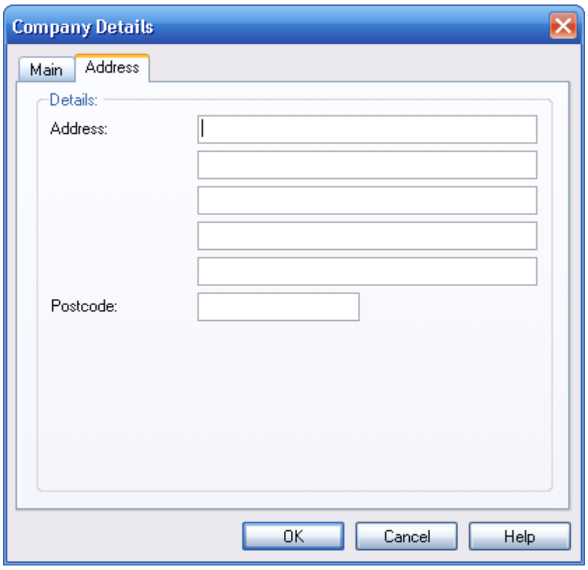
Within this section you are able to enter basic Company contact details.

Simply click on the relevant tab and fill in the information as shown below. This can be found by selecting 'system setup' then 'company details' on your main dashboard.

On the Main tab you should enter the basic contact details.

The Web links section is required if you have purchased any extra modules which link with Simply Personnel. If you have purchased these enter the website links here and this will create extra buttons on your main dashboard so you have a quick link to the extra modules from within Simply Personnel.

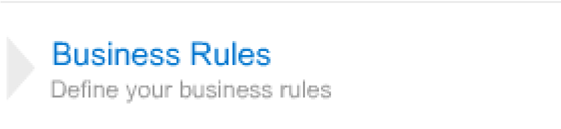
The next tab is Address and looks as follows



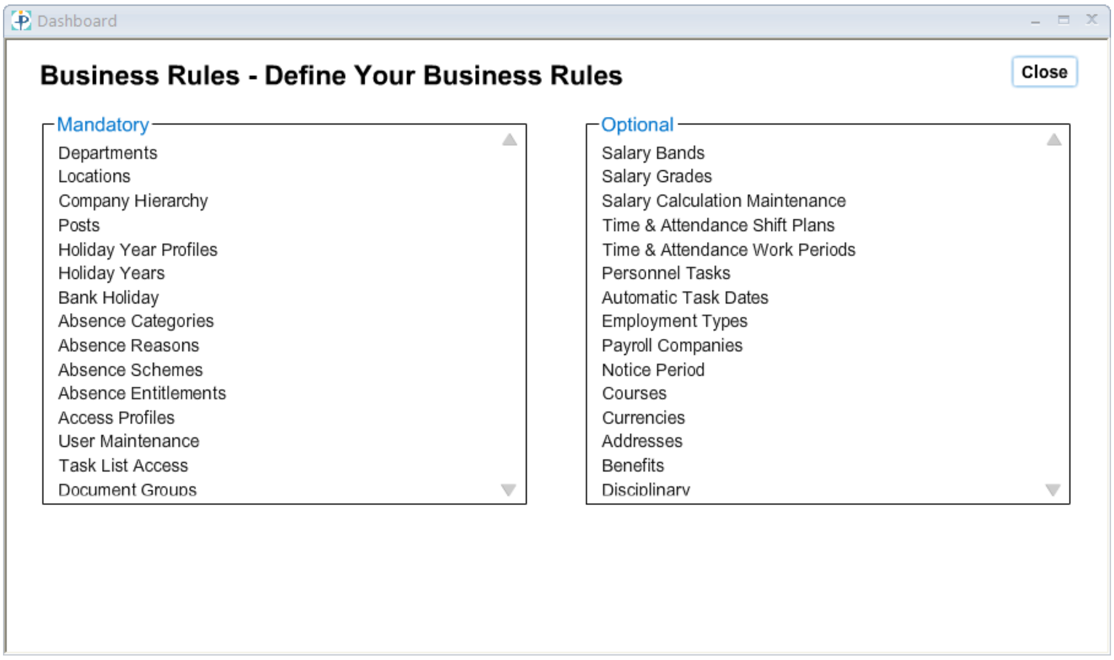
The Main contact address should be entered in this section.

Setting up Business Rules:

To set up your Business Rules on your Simply Personnel system you need to select the Business Rules tab. This is located in the system setup on your main dashboard.



This will then take you through to the following page.

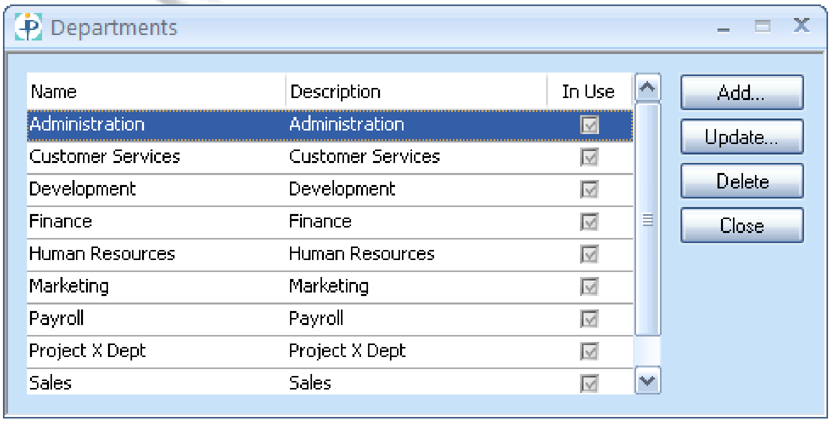


Mandatory Section

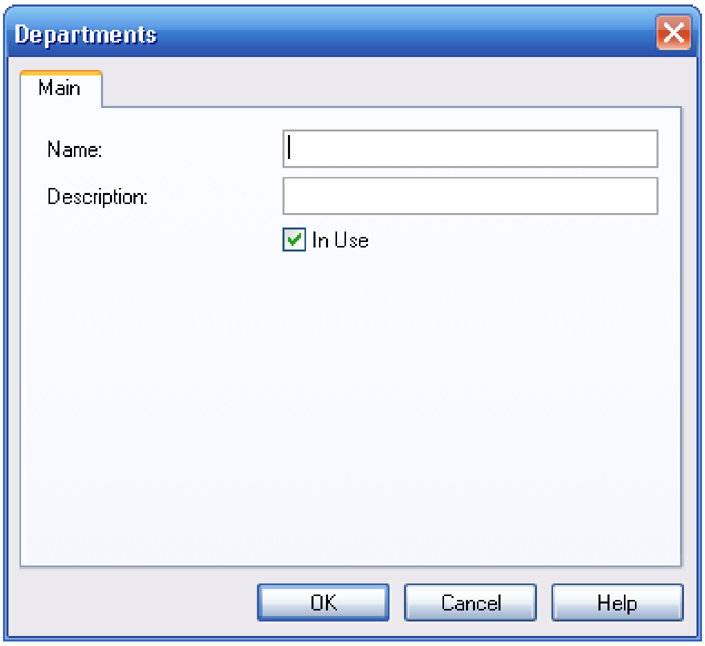
Departments

Within the Departments section you should enter a list of all possible Departments within your organisation.

If you click on ‘departments’ you will be taken to the following screen,



To add a new department click on the Add button and you will be able to input the following information.



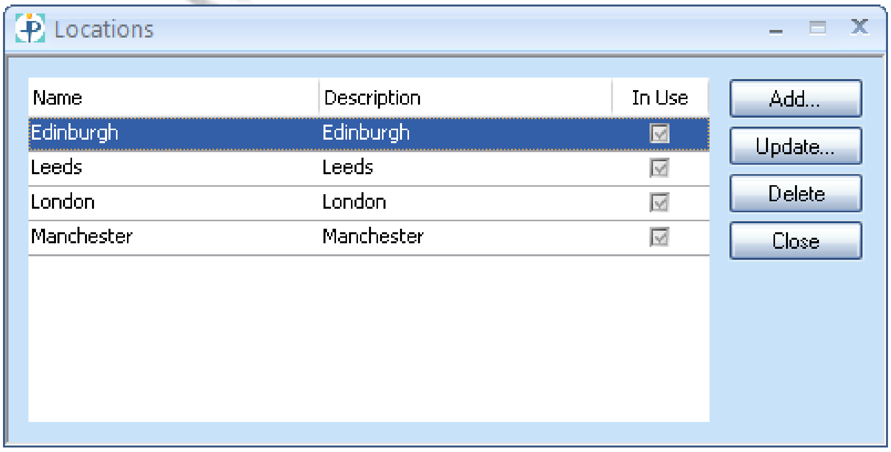
Simply enter the name of the department and a department description (if you do not have a separate description, just repeat the department name), and click save and this will create your department.

You will see the In Use tick box on many screens within Simply Personnel, you should un tick this box if you no longer want to use a specific option.

If you wish to update an already created department then simply click the update button on the main departments screen or double click on the department.

Locations

This section is very similar to the departments section however on here you should enter all possible Locations for your organisation, to do this click on locations and you see the following page,



You should then create the locations by clicking the Add button and entering the Locations and there descriptions (if you do not want to add a description, just add the location name again).

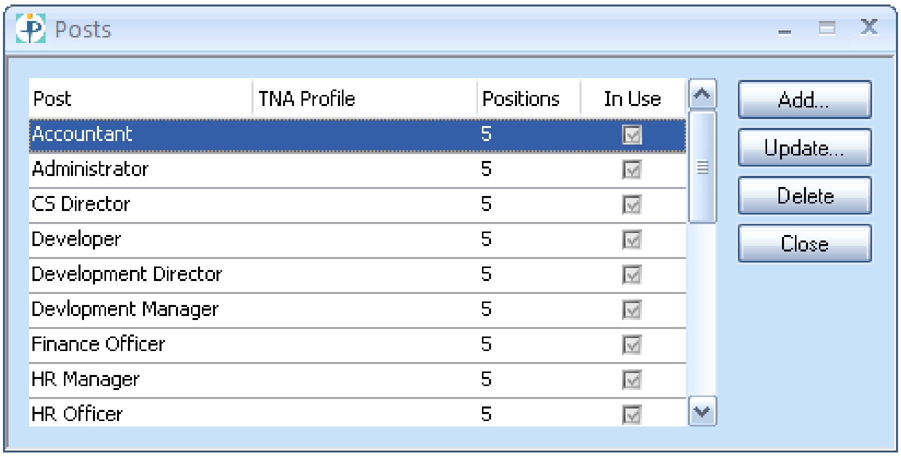
As with the Departments section you will also be able to update the entry by clicking ‘update’ or double click the location (also see Departments).

Hierarchy

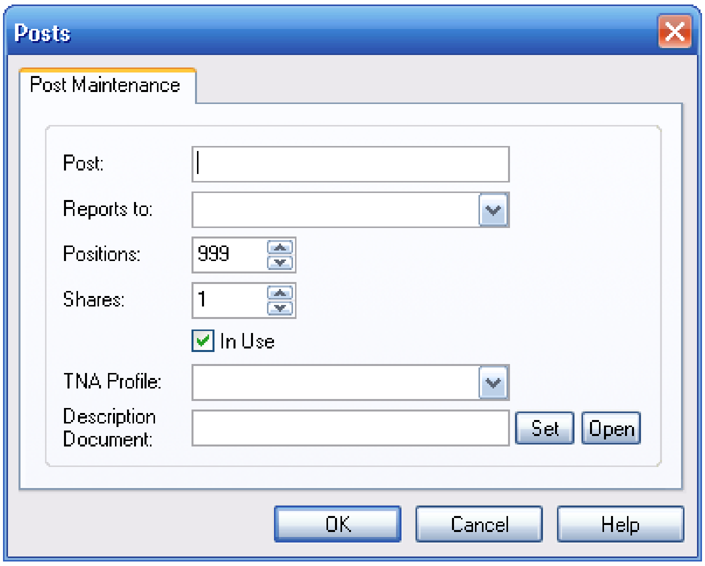
Please refer to the manual tagged Hierarchy for details on how to set this up.

Posts

Within the Posts section you should enter all Job Titles within your company. To do this select ‘Posts’ from business rules,



To add a new post click the Add button and you will see the following,



Enter the job title in the Post section, if you are doing this from the very beginning enter the job title of the highest position within your company first so that as you work through you will set the ‘reports to’ option each time.

In the reports to section choose the job title that this new job reports to.

The positions section shows the amount of positions available for this specific post, if you set this at a low number and try to add too many people to the post the system will alert you.

In Shares enter the number of job shares within this post.

The In Use tick should be selected if you wish to use this post against an employee, if this post becomes redundant then come back to this section and use the update button or double click the post then un tick the box, this will stop you adding people to this post but if the option has been used against an employee previously it will stay on there record as historic data.

The TNA Profile relates to the Training Manager module. This is not relevant unless you have purchased the Training Manager. If you have purchased the Training Manager you can allocate Training Needs Analysis Profiles to specific posts so these needs will be added to the employee’s record automatically. The TNA Profiles are set up within the Training Module System Setup (See Training Manuals).

Description document is where you are able to add a job description to a specific post, to do this click the Set button and chose the relevant file from your computer, to open this file at a later date just click the open button on the post maintenance screen above.

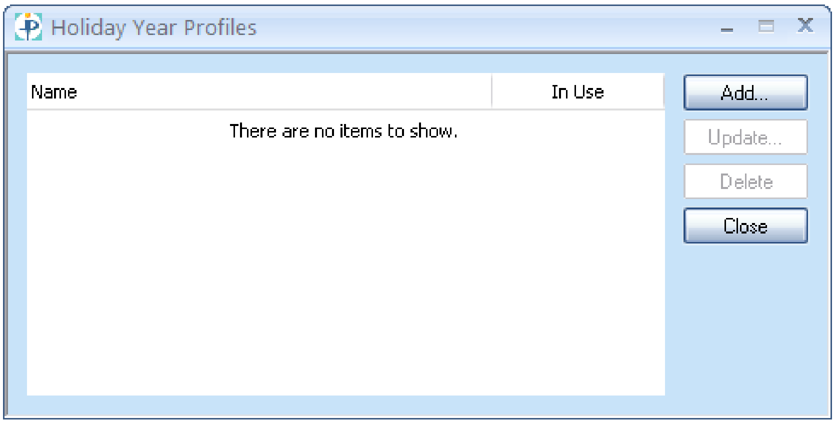
Once you have entered all your information click the ‘OK’ button.

Holiday Year Profiles

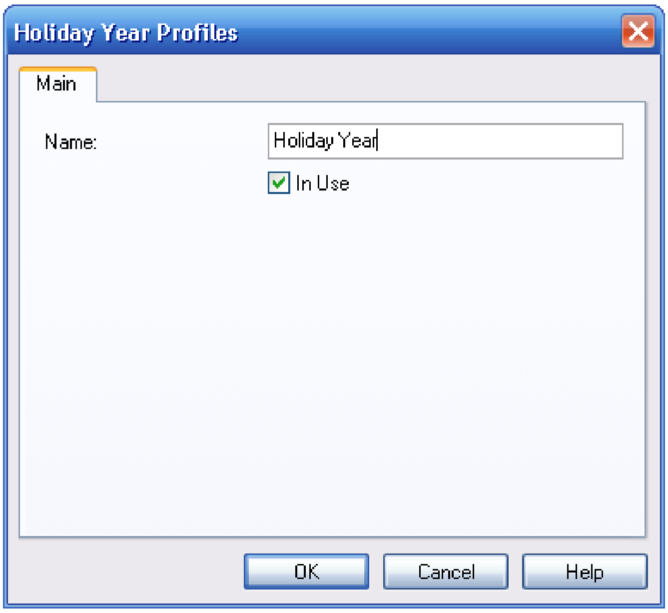
Within this section you are able to enter all possible holiday year profiles that exist within your organisation. This gives you the flexibility to allocate different holiday years to different employees.

Within this section you only create what you would like the Holiday Year/s to be called.

To do this click on Holiday Year Profiles,



Click the add button enter the holiday year name in the box as below and click the 'OK' button.



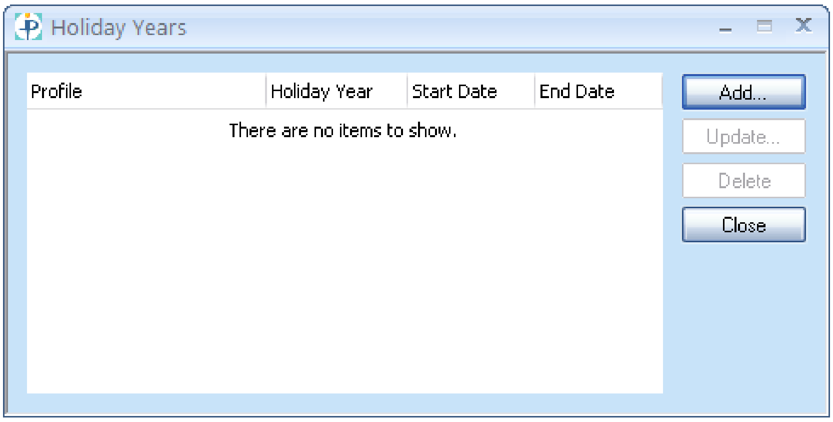
You will need to create all possible options so you are able to set the dates of the holiday years in the Holiday Years Maintenance section.

*Please note, if all employee's run the same holiday year i.e. Jan – Dec, then only one Profile needs to be created)

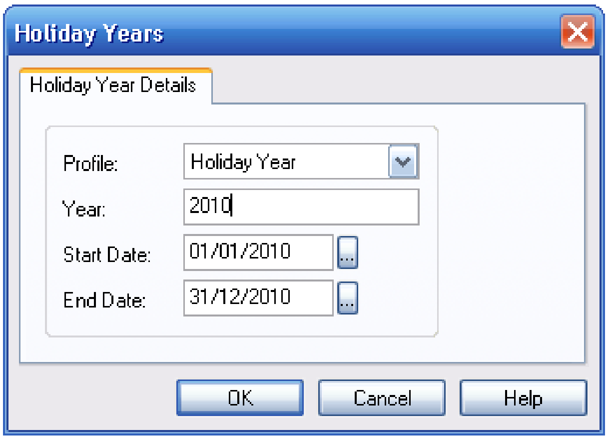
Holiday Years

Within this section you are able to allocate start and end dates to the Holidays Year Profiles you have created in the previous step,

To add the dates click select Holiday Years then add on the following screen,



Once you have clicked add you will see this screen,



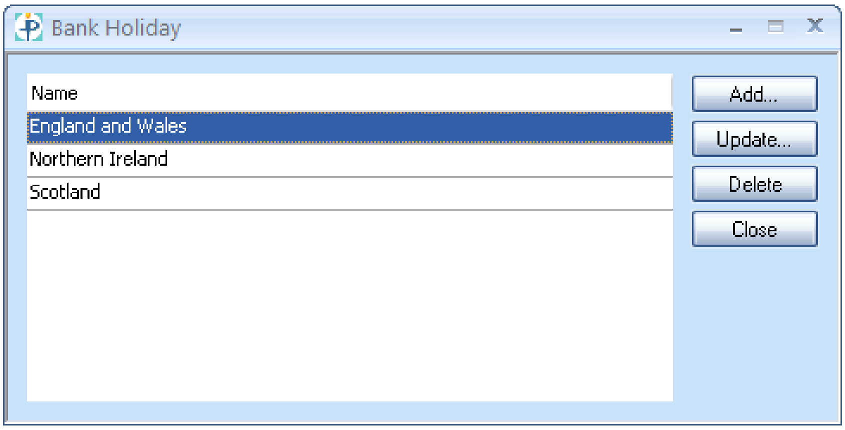
Choose the correct Profile from the dropdown menu, type the name of your year i.e. 2010, then click the button on the right hand side of the start date box, this will bring up a calendar for you to select the start date of your holiday year. Then repeat the process for the end date.

You will now have the option of using these holiday years on an employees holiday record.

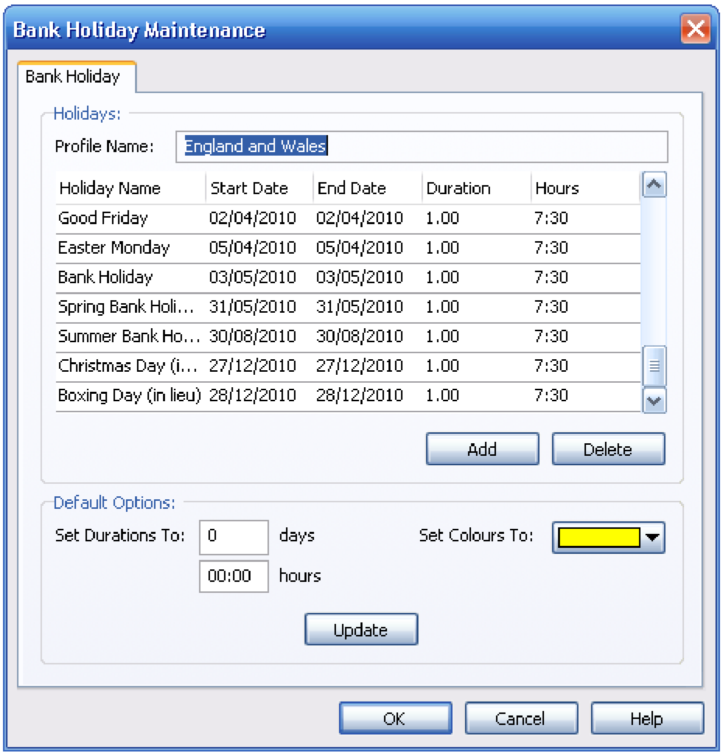
Bank Holidays

Within this section you are able to create bank holiday profiles which will then allocate bank holidays to an employees holiday profile. There are already some default profiles set up within Simply Personnel which you are able to use.

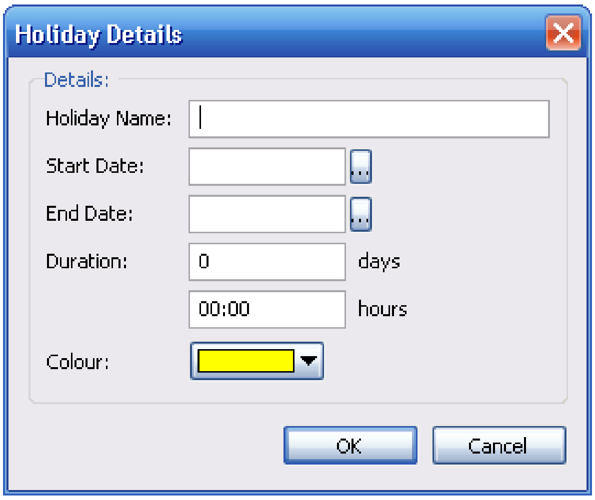
Once you enter the Bank Holidays section you will see the following screen,



You can create as many profiles as you require. To create a new Bank Holiday profile click the Add button however if you wish to change or add dates to a previously created profile click Update on the correct one. Once you have done this you will see the screen below.



You will see a list of bank holidays on this screen however you will need to keep this updated. To add extra days click the Add button and you will be able to add days using the following screen,



Simply add the name of the bank holiday and its start and end dates, this will then automatically create a duration which will come off the employees holiday entitlement when this date is hit. You can also select a colour for this holiday.

On the main bank holiday maintenance Screen next to the dates there is a ‘duration’ field, you can set each of the durations to a specific number which will then come off the employee’s holiday entitlement automatically.

To change all the durations in one go simply use the set duration’s box with the correct number and click the Update button, this will then change all the durations and give you the option to update all the employees records who use that profile.

If you do not wish for the bank holiday to take a day off the employee’s entitlement, ensure you select ‘0’ in Set duration to, then click update.

Absences

Please see the document tagged Absences to set this up.

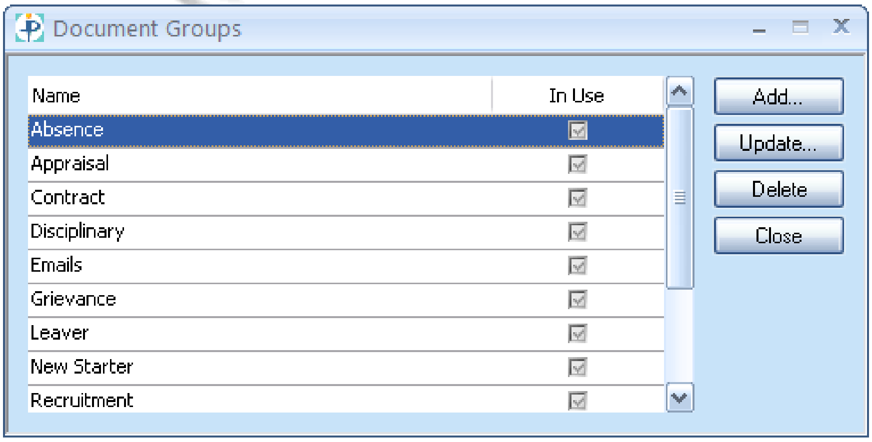
Access Profile/User Maintenance.

Please see the document tagged Security to set this up.

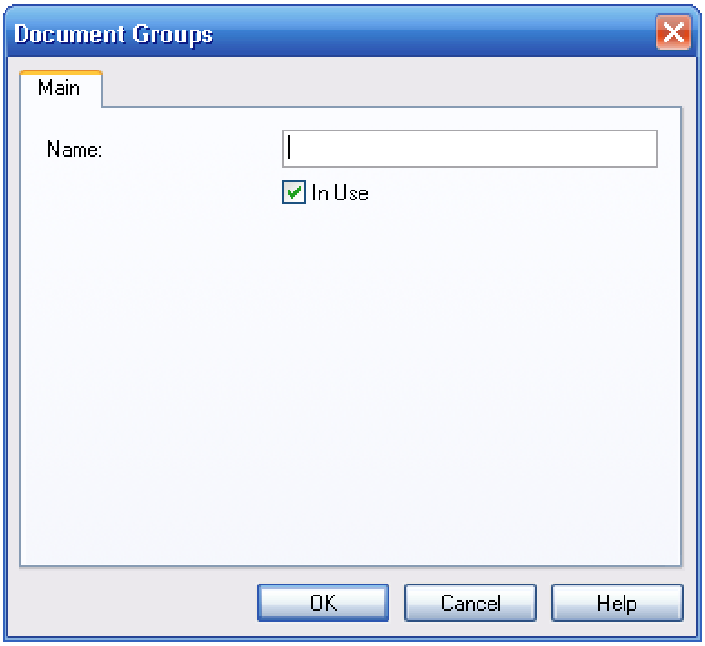
Document Groups

This is used to group together documents that you would store in Simply Personnel for employees, in order to make them easier to find. Please see Screen Shot Below.

Also these groups are used to group together template documents that you may send out to employees. (Please see document tagged ‘Setting up Mail Merge’



To add new document groups, select ‘add’ from above, this will load the following screen,

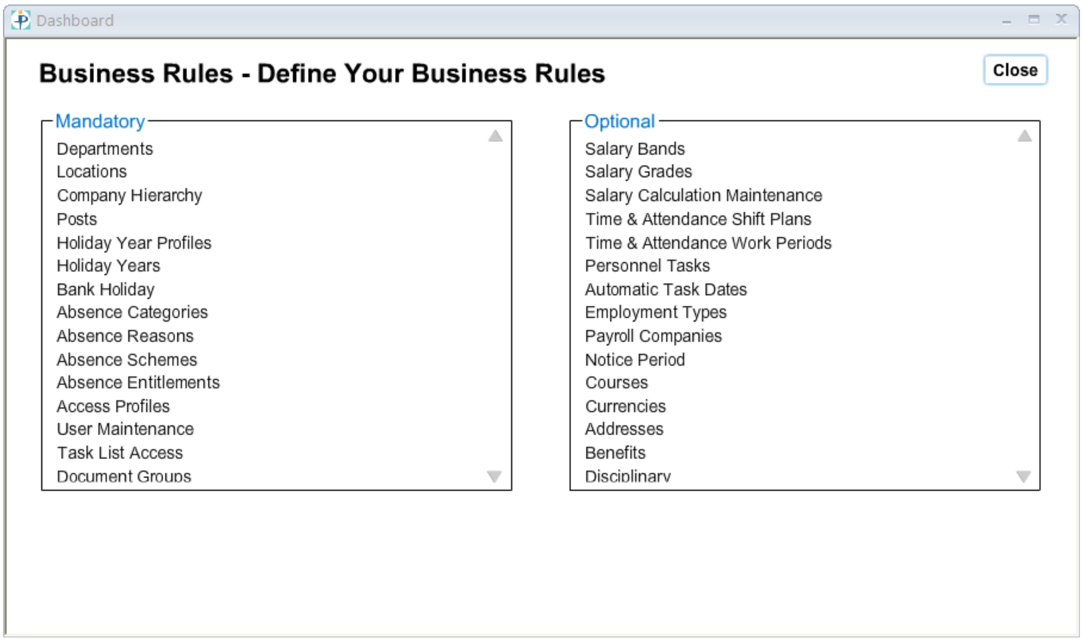


Type in the name of the document, click ‘OK’ then this will be added as a document group.

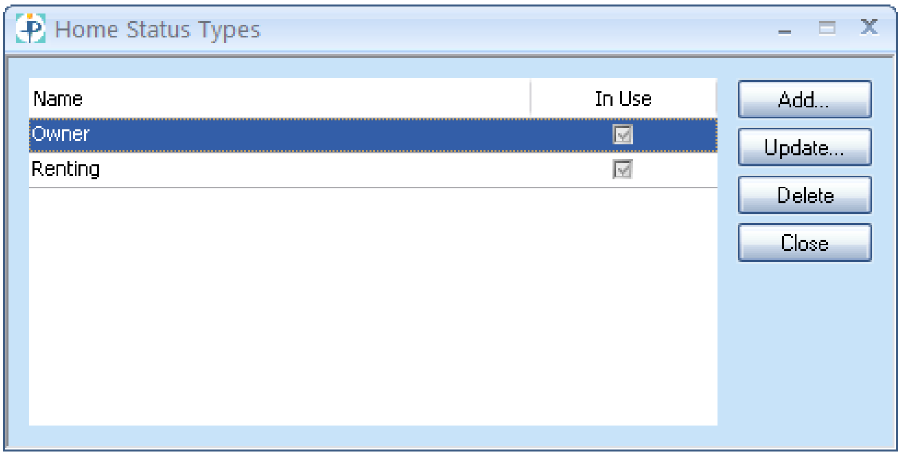
If a document group is no longer used, this can also be taken out of use, by clicking update on the Group then taking the tick out of ‘In Use’.

Optional Section

A lot of information within simply personnel is generated by drop down lists, you can populate these lists by going to business rules and find the heading under the optional list.



In this section you are able to populate all the different dropdown boxes which can be found on the employees records, to access the correct section just click on one of the headings and you will see a screen similar to the following,



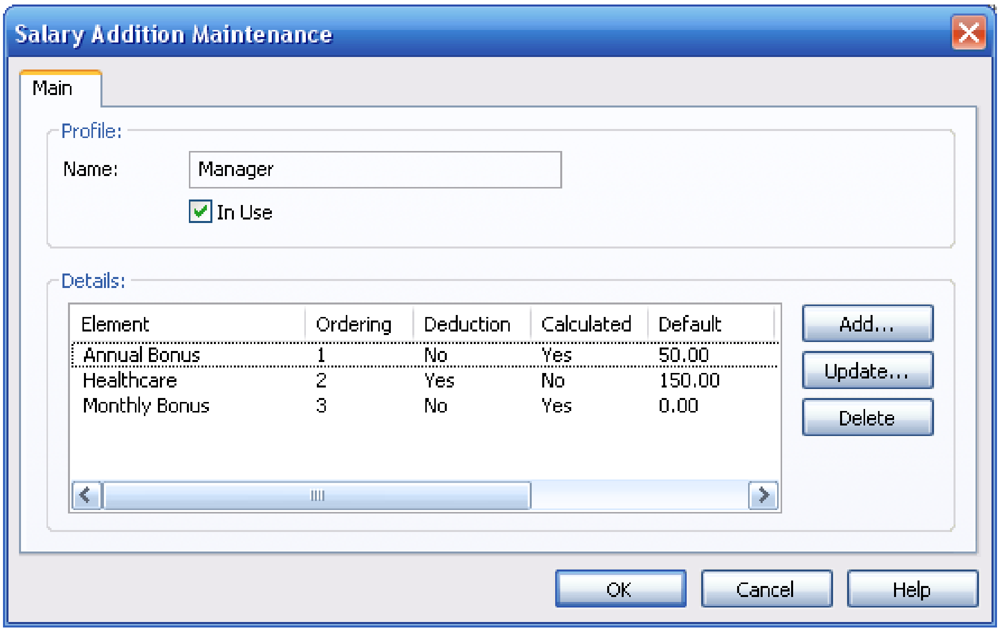
To add a dropdown option just click the Add button and fill in the correct information.

Most of the dropdown options are self explanatory however there are a few which require slightly more information and these are as follows,

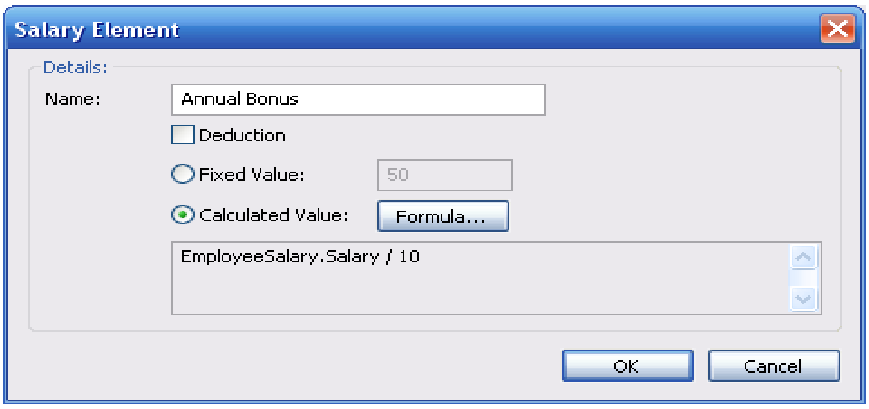
Salary Calculations

Users can create salary calculation profiles which can then be added to salary records. These profiles can be used to calculate additional salary figures based on either fixed values or formulas.

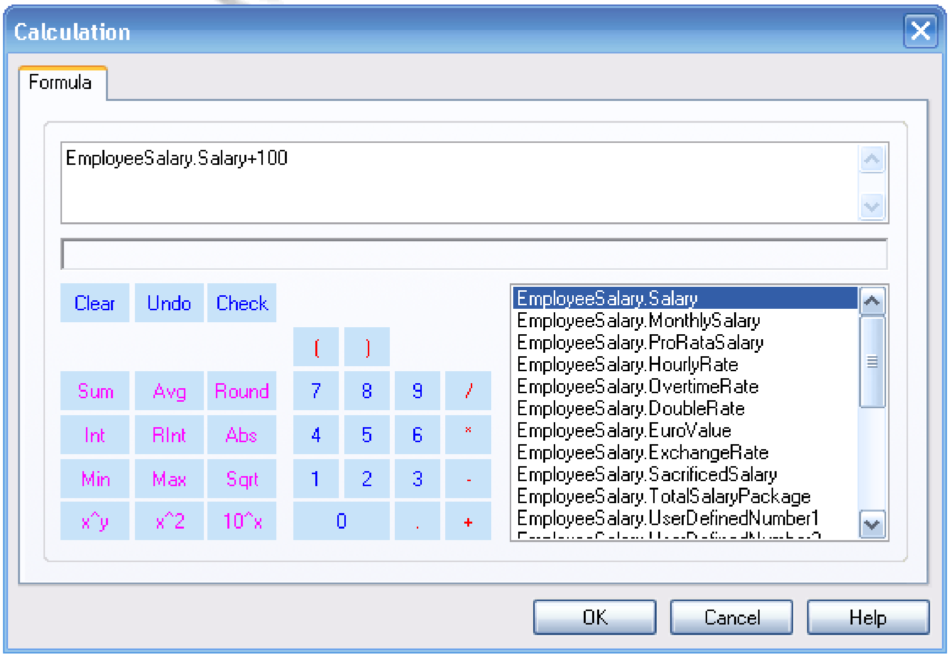
Click on the Add or Update buttons and the screen below will be displayed as below,



Enter the name of the profile and whether it is currently in use or not. The Ordering column determines the order in which the elements will appear in the list as well as determining the calculation order if formulas are applied to the elements. Click on the Add or Update buttons to add elements to the list of additions.



Enter the name of the element and if you want to deduct the element's value from the salary figures. Elements can either consist of a fixed value, e.g. £100.00, or can be based on a calculation. Click on the **Formula...** button to create the calculation. See below,

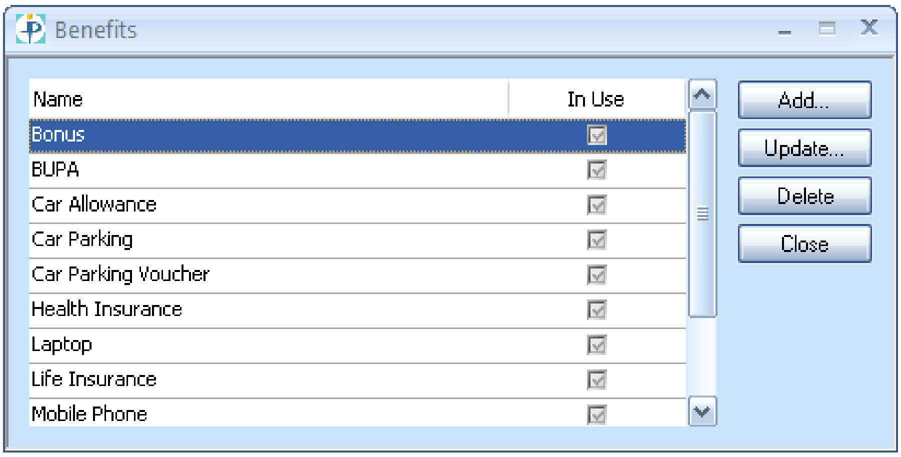


The list of fields available will be those from the employee salary records.

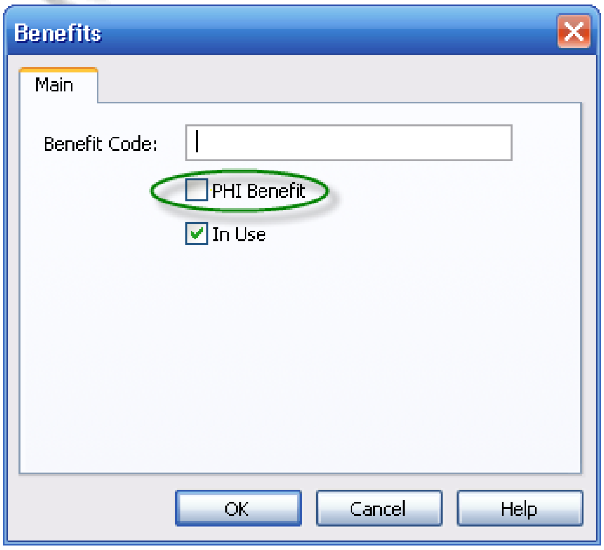
Please note, Editing a profile will not automatically update employees using that profile.

The example above would be the employee's Salary plus 100, when you have finished your formula, click 'OK'.

Benefits



Within the benefits dropdown you are able to select if the benefit type is a PHI benefit (Private Health Insurance), if this is the case the select the tick box that says PHI benefit on the relevant benefit type, by doing this you will allow this benefit to be used as PHI on the employees benefit tab. See Below,

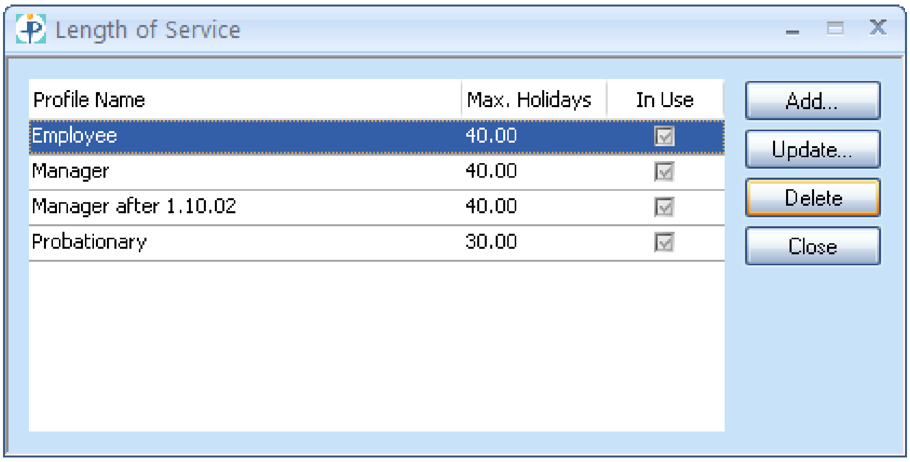


Length of Service

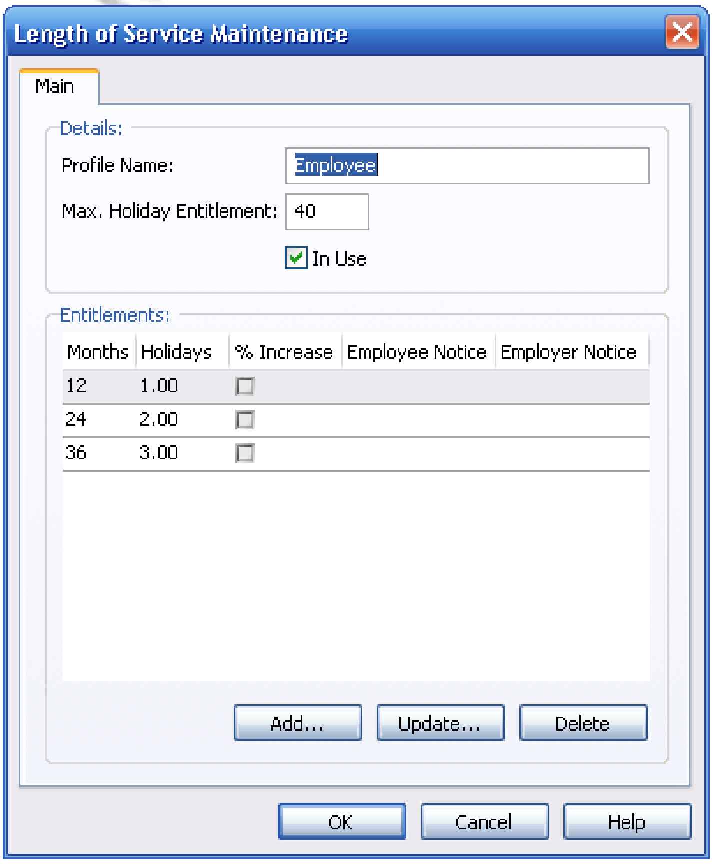
This dropdown allows you to create a number of Length of Service Profiles which will allocate extra days holiday to employees depending on how long the have worked for the company. This will allocate the extra holiday entitlement to the employee's record at the start of the following holiday year.

This can also be used for increase in Sickness Entitlement, and Notice Periods.

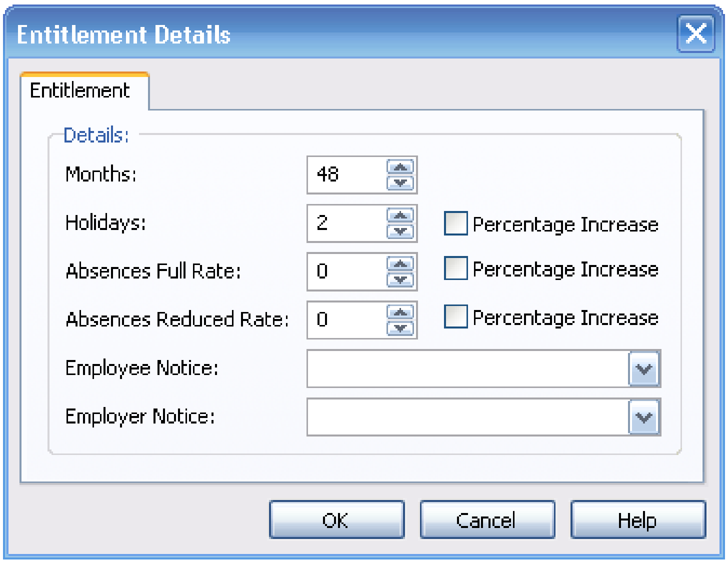
To add a new profile click on the Length of Service button on the optional side of business rules section and you will be taken to the following screen,



To add a new profile click the add button or to change a profiles settings click the Update button with the correct profile highlighted and you will see the following screen,



Add a profile name to the Profile then to add the entitlements click the add button and select the correct parameters on the following screen,



Select the correct number of months which an employee has to work for the company and then select how many days should then be added to the holiday entitlement and then click ok. You can also amend the absence rate and notice periods.

*Please note all figures should be quoted as additions to the original entitlement.

You can add as many different increments as you require. You will be able to select which Length of Service profile an employee is on in the individuals employee record.

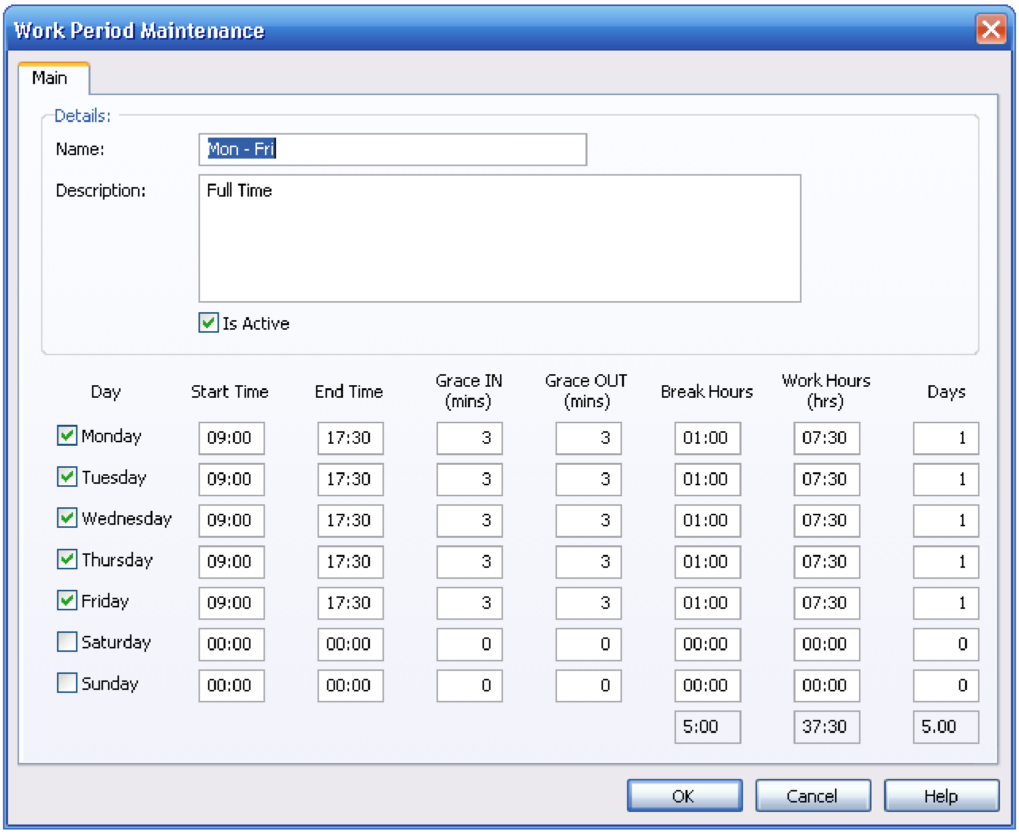
Time and Attendance

This allows you create Work Periods and Shift Plans for employees. See below,

Work Periods

A work period defines a working pattern for any given week, specifying which days are working days along with the durations for each in either parts of a day or hours.

Select 'Time & Attendance Work Periods' and click add, or 'Update' to amend an existing record.

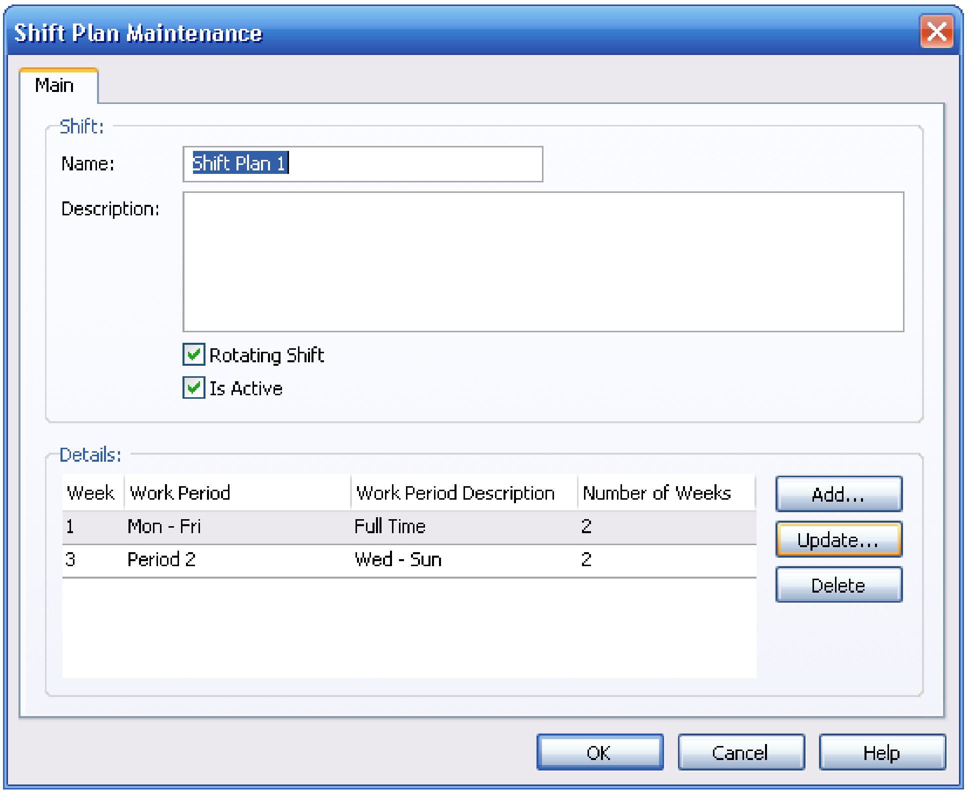


Give the work period a name and description and place a tick in each working day. The only fields used for the main application are the Work Hours and Days columns. The others are used by online timesheets module.

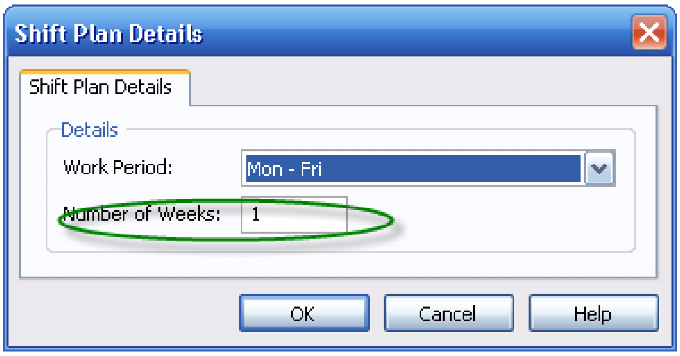
The hours should be entered in the format HH:MM and the days can be any value between zero and one. Click on 'OK' once the work period has been configured.

Shift Plan

A shift plan is built up from a series of work periods where you can define a number of weeks for them, which will make up the shift pattern,



Give the shift a name and description and add a series of work periods to the list at the bottom. When you add a work period you will be asked to select a work period and the number of weeks this will be valid for, see below,

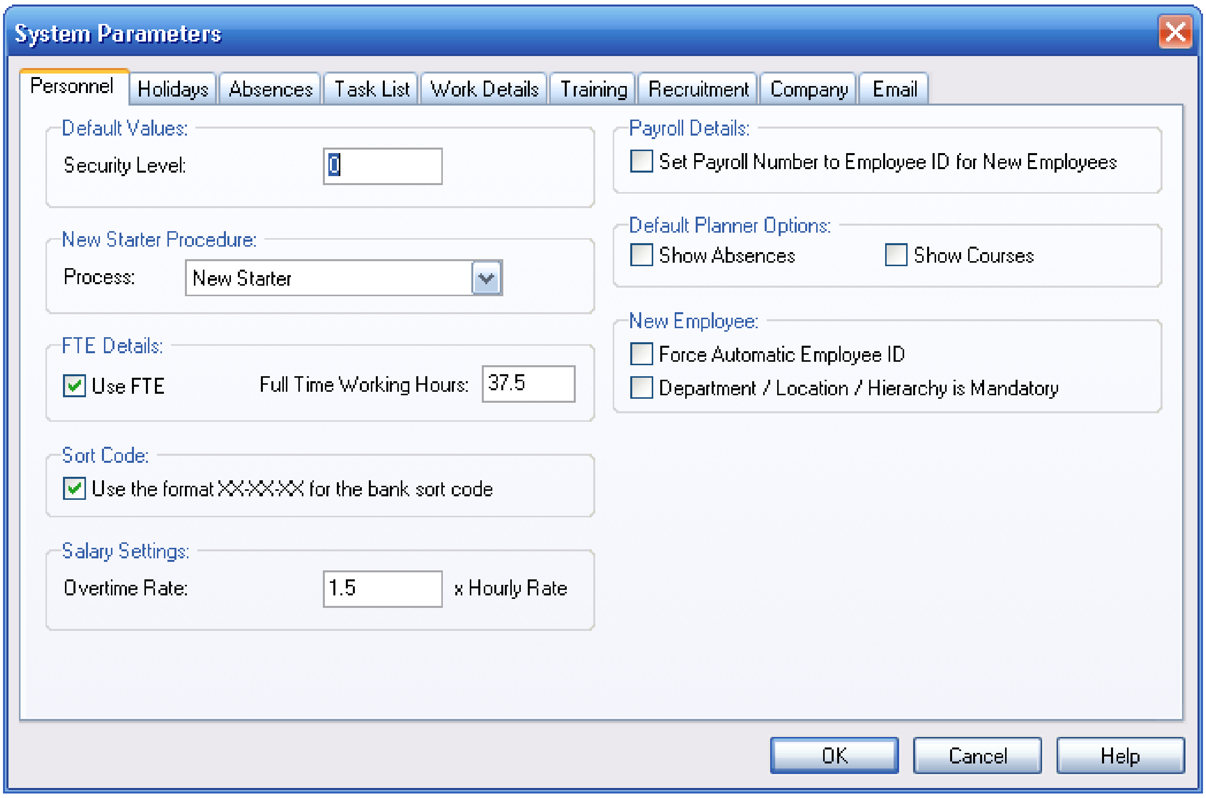


If you add a second work period the start week will be set to the start week of the previous work period plus the number of weeks for the previous work period. For example, in the screen short above (Shift Plan Maintenance) the work period starts in week 1 and runs for 2 weeks. A second work period will start in week 3.

System Parameters

The System Parameters section is where you fill in some of the default system options for your company.

To access this section, go into the system setup on your main dashboard, then select system Parameters, you will then see the screen below,



The new starter procedure is a default setting and will automatically select the relevant procedure to run when adding a new employee, to amend or create processes you should use the Business Process Designer option within the System Setup (see business process designer manual). If you do not want a process to run, select the blank line within the drop down.

The use FTE option allows you to allocate a Full Time Equivalent value against employee records, this works on a decimal basis so 1 will be full time 0.5 will be half the hours etc. This will pro rata employees holiday entitlement and pay depending on the individual value.

The Sort Code option allows you to add the dashes between numbers on the employees sort code within their bank details.

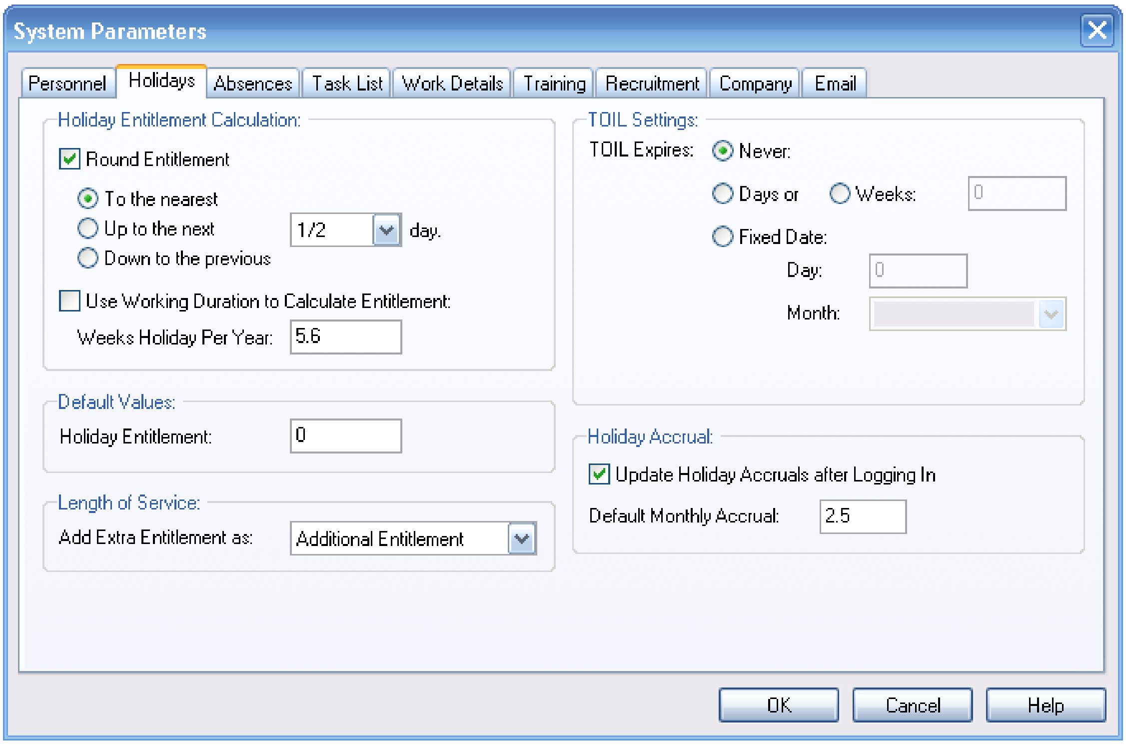
Overtime Rate – Please insert your standard overtime rate in this field. For example time and a half would be 1.5.

Payroll details, this tick box allows you to set all the payroll numbers to the same as the employee ID numbers for all new employees. To do this put a tick in the box.

Default Planner options, you can select in here if you want to see absences and courses as a default in the holiday planner, tick the relevant box.

New employee, Force automatic employee ID, this will automatically generate an employee ID to the next highest available number when you add an employee.

The next tab is Holidays,



Holiday Entitlement Calculation is where you have the option to round the default holiday entitlement by ticking the tick box, you should then choose how you round the holiday entitlement by selection one of the radio buttons and the period of time by using the dropdown box.

The default Value for Holiday entitlement can be selected next. The default holiday entitlement will be used when adding a new employee, you should enter the majority holiday entitlement in this box but make sure you take into account the bank holiday entitlement and length of service dropdown option (see Bank holiday profiles and Length of service in the dropdowns section). If these default entitlements are changed then it will not change the employees that have already been allocated any entitlement.

The holiday entitlements functionality has been expanded upon to offer a different method to calculating the normal annual entitlement. The calculation is based on the number of days the employee works in a week multiplied by the number of weeks holiday per year. The calculation is intended to be used for those employees that have a holiday entitlement recorded in days, not hours.

The new calculation and number of days weeks holiday per year are configured using the System Parameters.

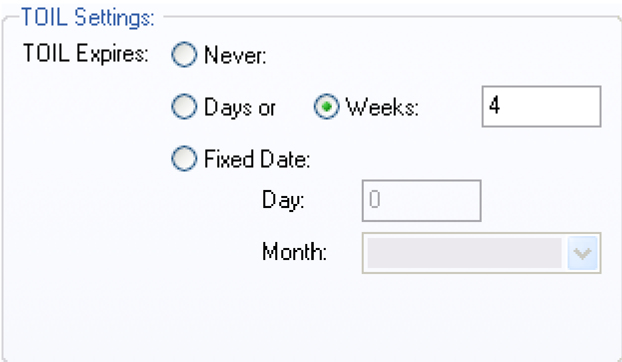
Tick the **Use Working Duration to Calculate Entitlement** option to enable the new calculation. Please note this will replace the default option of assigning the default annual entitlement to the employee and, for part time employees,

The new calculation will also use take into account the full time equivalent functionality so it is recommended that if you wish to use this calculation you should disable the FTE functionality using Personnel options in System Parameters. If you don't then part time employees could have a calculated value based on their working week and then have this multiplied by the FTE value, resulting in less days than they should.

The default value for the **Weeks Holiday Per Year** is 5.6, which comes from a standard working week of 5 days, e.g. 5 x 5.6 = 28 days per year, including bank holidays.

Select whether the Length of Service will show added to the annual entitlement or show as an additional entitlement.

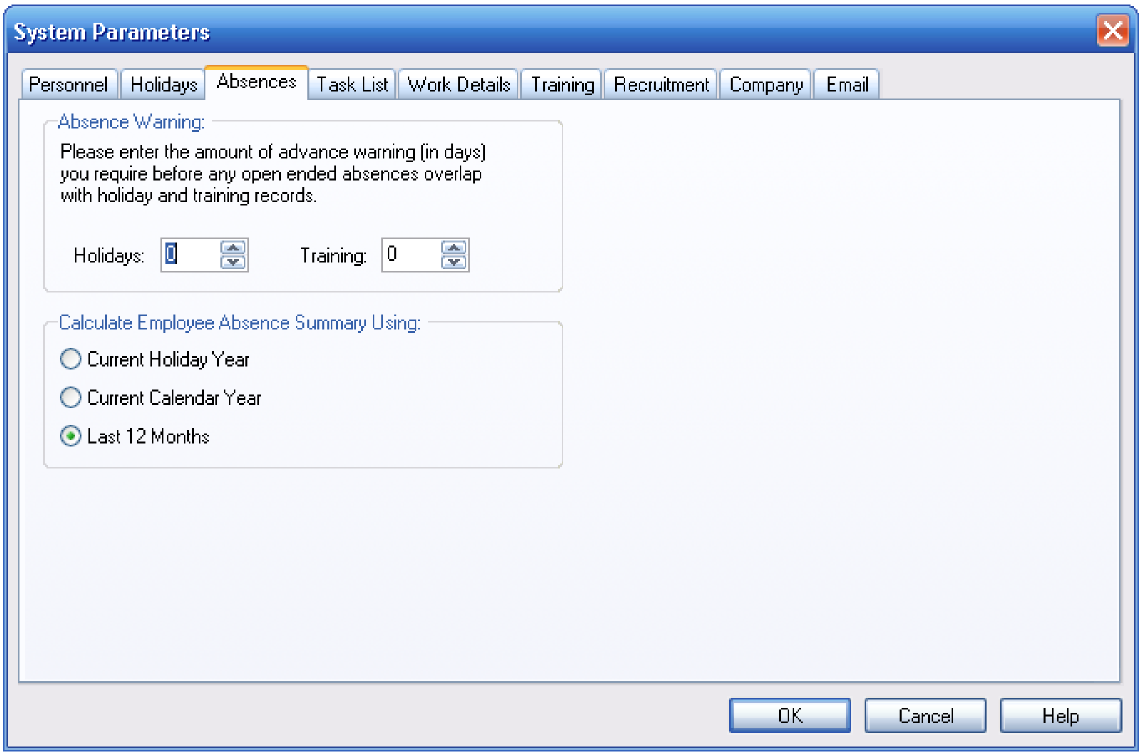
If you use TOIL (Time off in lieu) select the time period that it will expire in. For example if someone gains 1 days TOIL but must use this within 4 Weeks, Select Week then add a '4' as below.



Use the Holidays screen in the System Parameters to set the default accrual figure and also switch on the login functionality. What this will do is when a user logs in, Simply Personnel will check to see which employees need their entitlements updating and add the accrual figure to the existing entitlement on the current holiday year.

Users can still change the employee's entitlement and the next time the accrual is due it will be this entitlement that is updated. The program will not calculate what it thinks the total entitlement should be, just add to the figure already there.

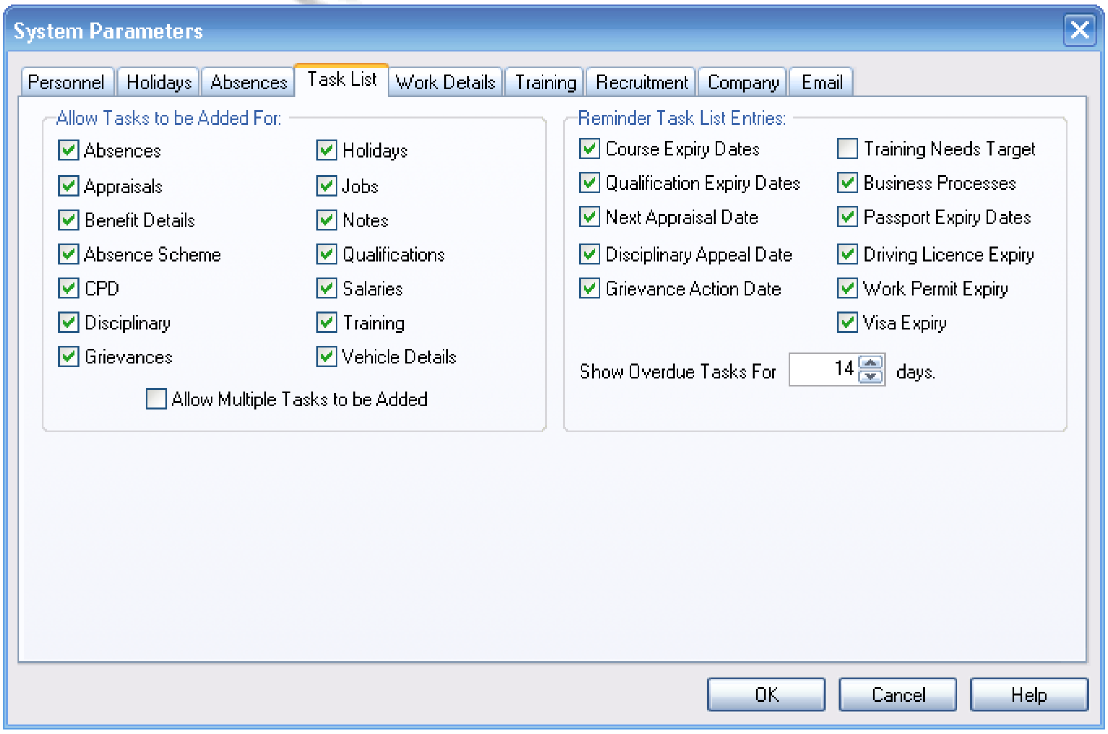
The next tab is Absences and looks as follows,



The Absence warning is for open ended absences and this will notify you if Holidays and Training will overlap with an absence, you can set the number of days you wish the reminder to appear before training or holidays by putting the correct number in the relevant box.

You are also able to select which employee absence summary you would like to view by clicking on the correct radio button.

The Task List Tab shows this screen,

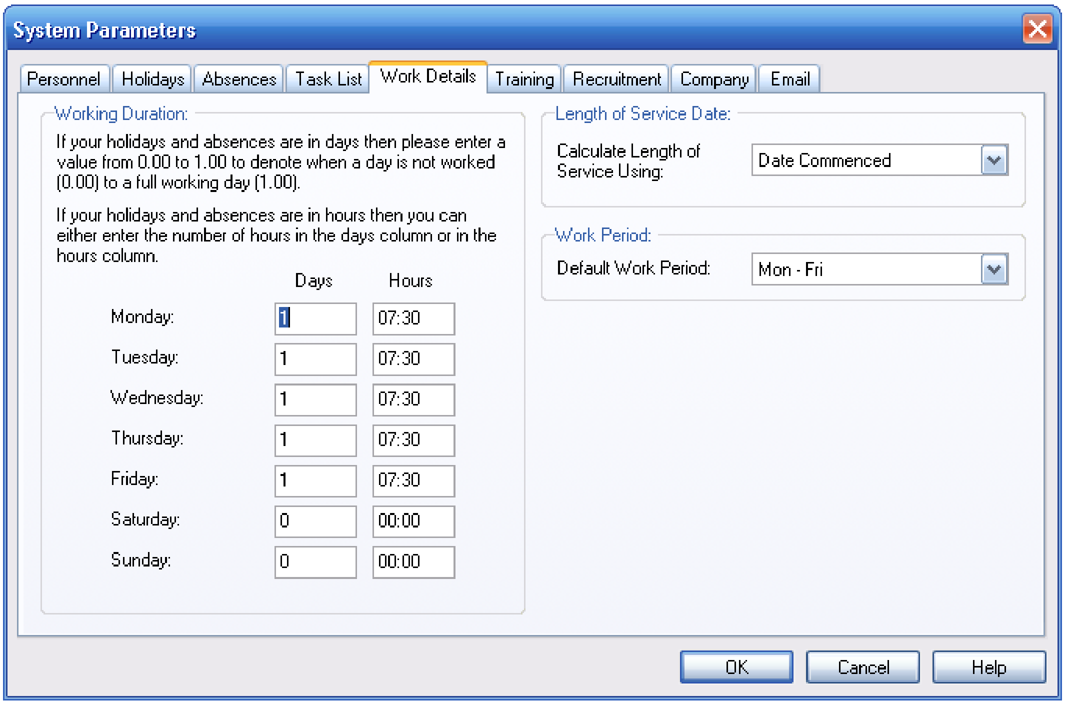


Allow tasks to be added links in with the employee record, when you access certain sections of the employee record you will see buttons that say's 'Task' which by clicking on them you can set a task up against that employee and relevant to the screen you are on, if you un tick the options on the above tab these buttons will not be available on the employees record.

Within the employees record you will be able to enter expiry dates and these will automatically create a task reminder within your task list, If you do not want these dates to create reminders within your task list then un tick the relevant boxes.

The show overdue tasks section allows you to keep tasks within your task list for a certain amount of days once the task date has passed, you can set this to however many days you wish, once this amount of days has passed the task will disappear from your task list.

The work details tab looks as follows,

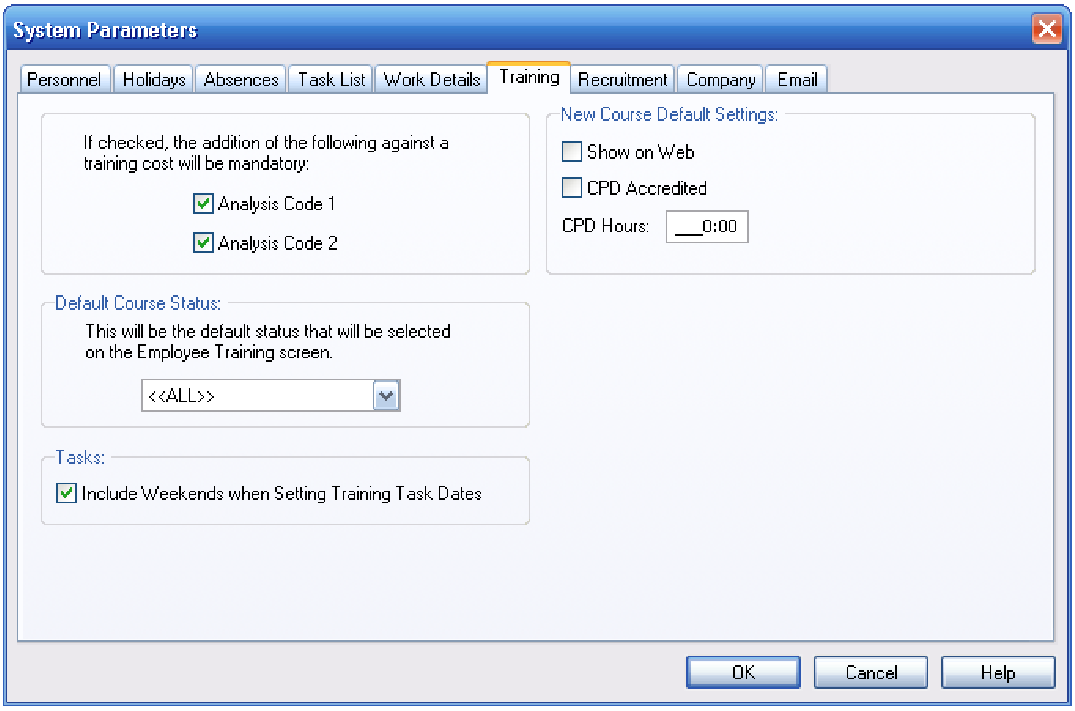


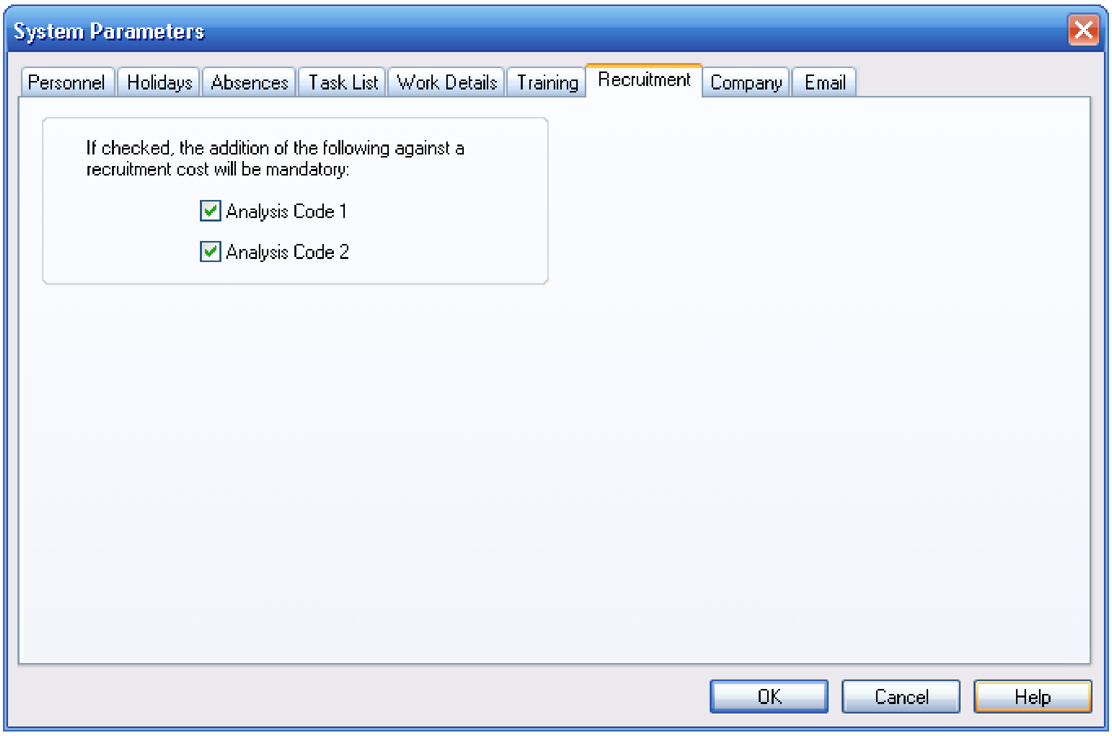
This tab allows you to set the default working time for employees, the number 1 shows that the employee is at work that day and the number 0 shows they are not. You are able to enter working hours in this section but you must then make sure holiday entitlement is set to hours. The working duration ties in with Absences and holidays and Simply Personnel will automatically calculate holidays needed and absence duration when you enter a start and end date on the employee's record, this will be calculated by looking at the employees working duration over a certain period of time.

*Please note, if you are using Self Service, Holidays entitlements in Self Service will use the 'Default work period' to work the duration.

This tab is a default working duration and every employee has this screen on their record which can be amended individually.

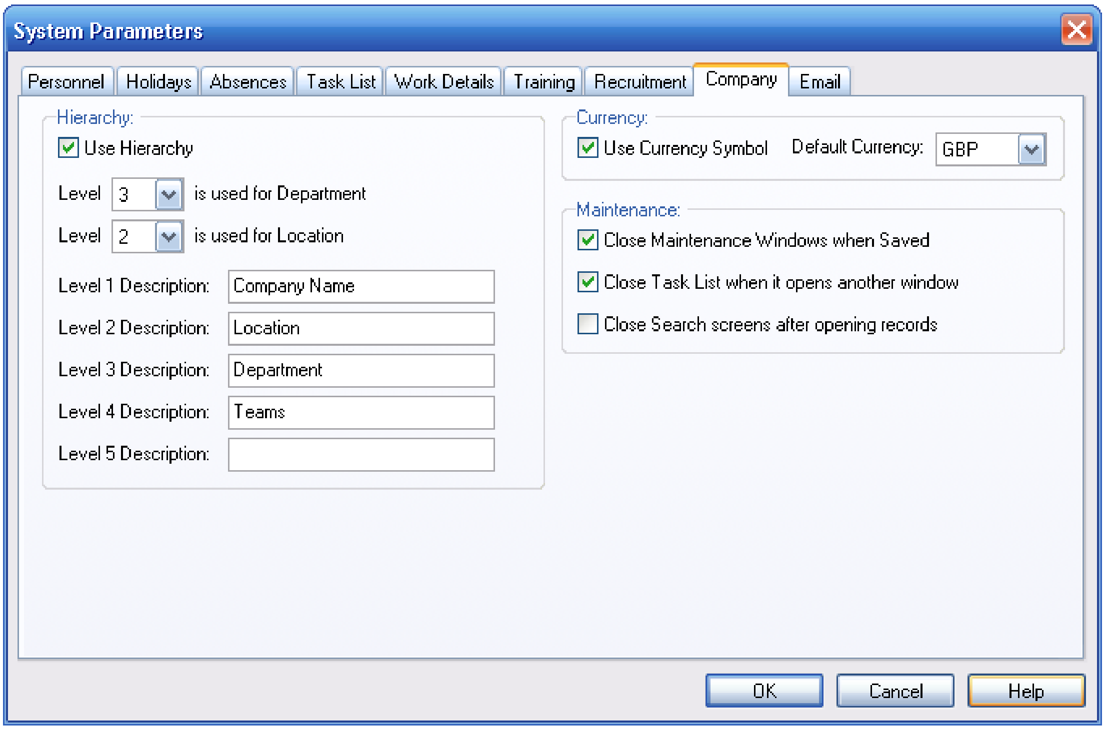
The Training and Recruitment Tabs will only be available if you have purchased the Training and Recruitment Modules, but look as follows,





These screens allow you to set some of the Training and Recruitment default settings (See Training and Recruitment Manuals).

The Company tab looks as below,



To use the Hierarchy option to allocate employees into specific areas tick the Use Hierarchy box, to set the Hierarchy option up see the Creating a Hierarchy Manual.

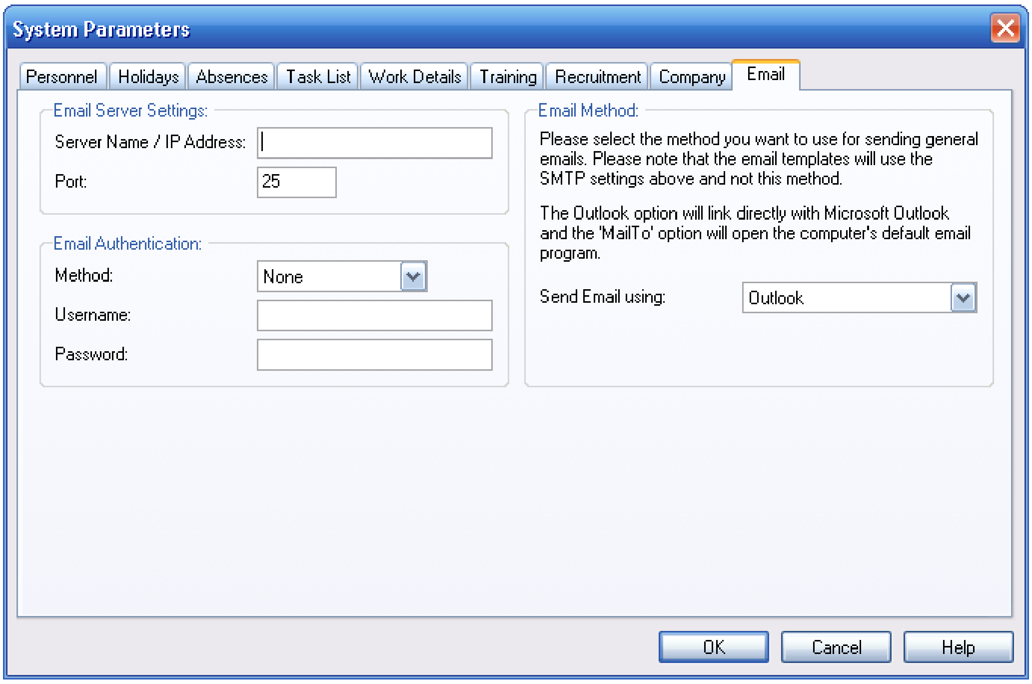
If you wish to use the Currency Symbol next to pay details on the employee's record make sure this box is ticked.

Close maintenance window when saved means that when you click the Save button within the system setup maintenance the window you were on will be closed.

The task list tick box gives you the option of do you wish to close the task list when you access any other screen on the system, if this is the case then tick the option.

Close search screens after opening records means that the employee search screen will close down when you are in an employee record.

The Final tab on the System Parameters section is Email and looks as follows,



Fill in the information into the relevant boxes, to help you do this contact your IT support or the Simply Personnel Support Desk who will help you with this.

Once you have filled in all the information click the OK button at the bottom of the screen to save all the data.

If you require any further information about any of the topics covered in this manual then please contact our Support Team via email or phone on support@simplypersonnel.co.uk or 0870 145 8270