

# Simply Personnel Personnel Manager

## Global Updates

## Simply Personnel: Global Updates

This document provides step-by-step guide for users to give an easy understanding on using the global updates on 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](http://www.simplypersonnel.co.uk) an option to open a support ticket.

Thank you

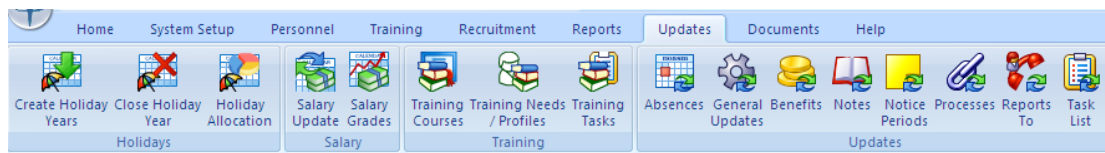
The Simply Personnel Team.

## Global Updates

By using the global updates options within Simply Personnel you are able to update a number of areas of Simply Personnel which will then Change all or a selection of employees records in one go.

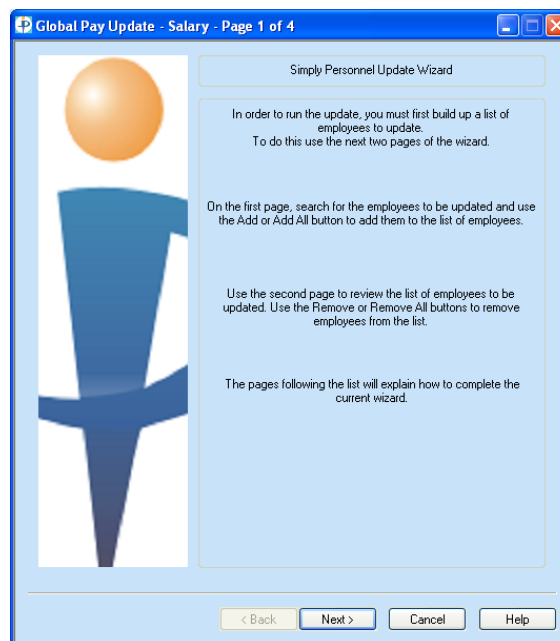
### Global Pay Change –

To access this option use the following steps, select updates at the top of the screen and go to the salary updates.



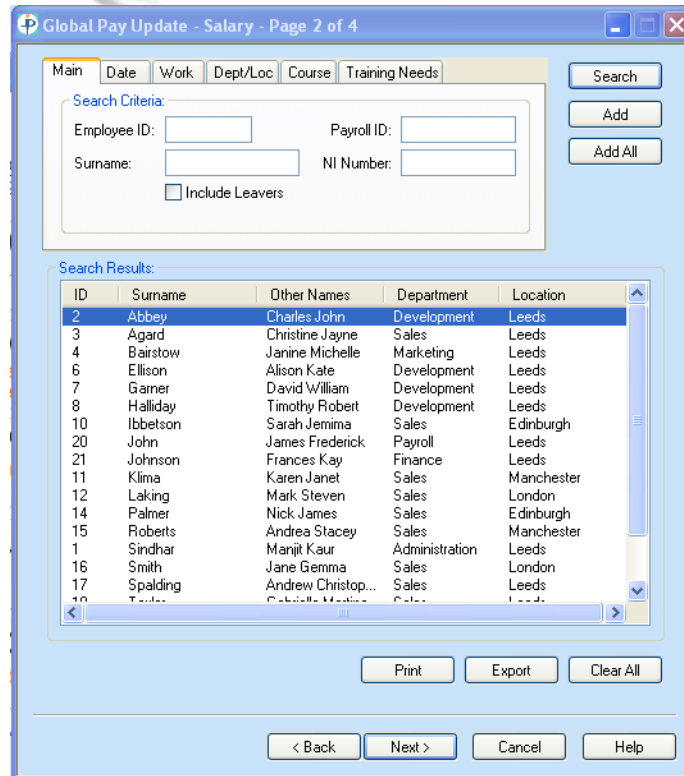
You will then have the option to either update the employees specific salary or the employees salary grades.

To update the specific salary click the Salary option and you will be shown this screen,



This screen is know as the wizard and gives you the option of choosing which employees to globally update.

You should click the next button at the bottom of the screen to proceed to the selection process; once you do you will see the following,



Global Pay Update - Salary - Page 2 of 4

Main Date Work Dept/Loc Course Training Needs

Search Criteria:

Employee ID:  Payroll ID:

Surname:  NI Number:

Include Leavers

Search Results:

ID	Surname	Other Names	Department	Location
2	Abbey	Charles John	Development	Leeds
3	Agard	Christine Jayne	Sales	Leeds
4	Bairstow	Janine Michelle	Marketing	Leeds
6	Ellison	Alison Kate	Development	Leeds
7	Garner	David William	Development	Leeds
8	Halliday	Timothy Robert	Development	Leeds
10	Ibbetson	Sarah Gemma	Sales	Edinburgh
20	John	James Frederick	Payroll	Leeds
21	Johnson	Frances Kay	Finance	Leeds
11	Klima	Karen Janet	Sales	Manchester
12	Laking	Mark Steven	Sales	London
14	Palmer	Nick James	Sales	Edinburgh
15	Roberts	Andrea Stacey	Sales	Manchester
1	Sindhar	Manjit Kaur	Administration	Leeds
16	Smith	Jane Gemma	Sales	London
17	Spalding	Andrew Christop...	Sales	Leeds

Print Export Clear All

< Back Next > Cancel Help

This is the same screen as you will find in the Amend employee section on the dashboard, simply select a category to search for employees by or hold your Ctrl button down on your keyboard and click on the employees you wish to update.

Once you have all the employees that you wish to select highlighted click the Add button which is found in the top right hand side of the screen to take these employees through to the next stage, alternatively click the Add All button to select all your employees for the next stage, once you have done this click the Next button and you will see the following,

Global Pay Update - Salary - Page 3 of 4

ID	Surname	Other Names	Department	Location
2	Abbey	Charles John		
3	Agard	Christine Jayne		
4	Bairstow	Janine Michelle		
6	Ellison	Allison Kate		
7	Garner	David William		
8	Halliday	Timothy Robert		
10	Ibbetson	Sarah Jemima		
20	John	James Frederick		
21	Johnson	Frances Kay		
11	Klima	Karen Janet		
12	Laking	Mark Steven		
14	Palmer	Nick James		
15	Roberts	Andrea Stacey		
1	Sindhar	Manjit Kaur		
16	Smith	Jane Gemma		
17	Spalding	Andrew Christo...		
18	Taylor	Gabriella Martina		
19	Watson	Patricia Helen		
22	Yerson	Jennifer Diana		

Remove Remove All Print Export

< Back Next > Cancel Help

On this screen you will see the list of employees you have chosen, you have the option to remove employees at this stage by highlighting the relevant employees and clicking the remove button, once you have the correct employees on your list click the next button, this will take you to the following screen,

Global Pay Update - Salary - Page 4 of 4

Pay Change:

Effective Date: 08/05/2009

Old Pay: <<ALL>>

Absolute Change To: £0.00

Amount Change By: £0.00

Percentage Change Of: 0

Preview

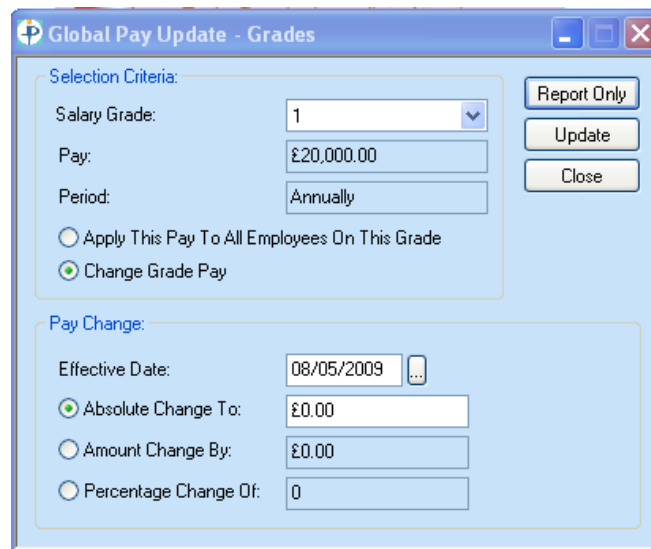
Employees to be updated: 19

< Back Finish Cancel Help

At this point you are able to select the pay changes that are to be made to the employee's record, you should make the alterations to the pay and then click the finish button, this will then create a new pay record on the employee's record, alternatively you can show a preview of how the change will effect the individuals pay by clicking the preview button.

### Salary Grade –

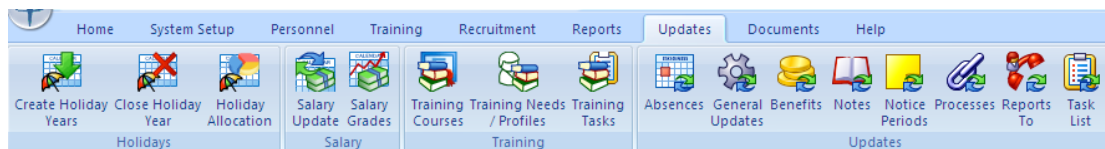
This enables you to upgrade the Salary Grade amounts, access the updates option and select Global Pay Change then Salary Grade (see global pay change section) you will then see this screen,



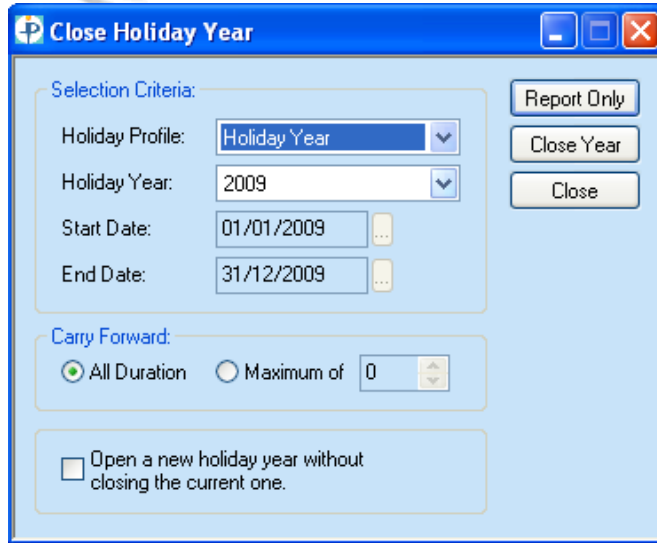
Once you have accessed this screen, choose the specific salary grade you wish to change and amend the amount using the correct option, you should then click update to amend the employees records or click Report Only to run a report of the Changes that would be made.

### Holidays, Close Holiday Year –

This feature enables you to close the current holiday year and open a new one on the employees records, to do this click updates and Close Holiday Year, as below,



You will then see the following,

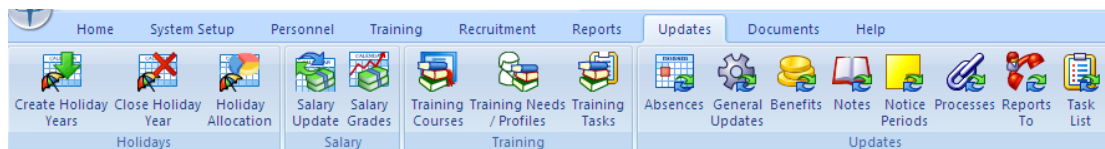


Select the holiday year you wish to close using the dropdowns and the amount of Holiday carry forward an employees is allowed, you also have the option of opening a new holiday year without closing the current one, to do this put a tick in the box at the bottom of the screen.

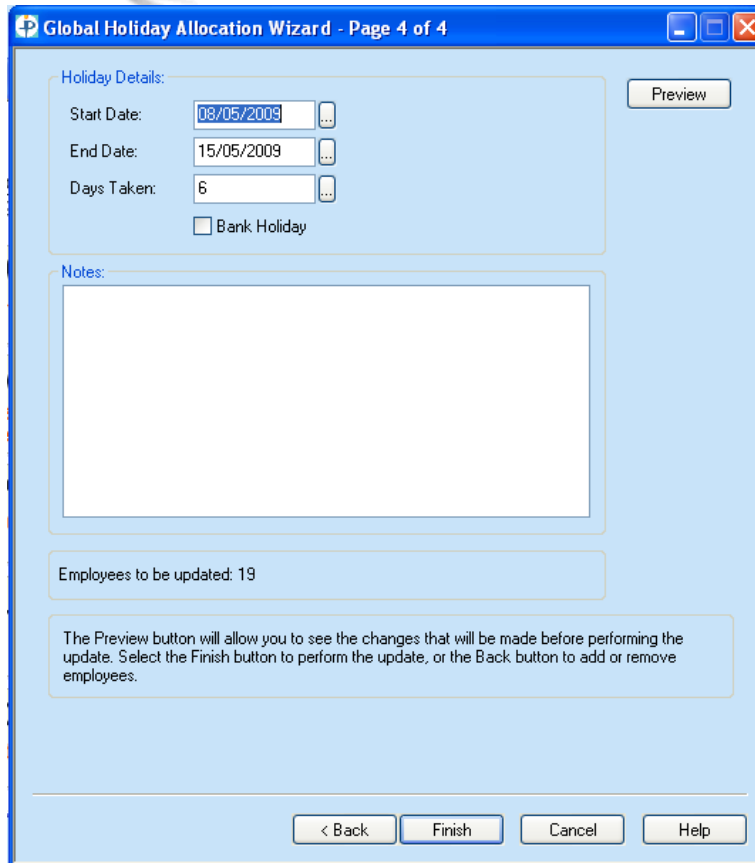
Once you have all you settings correctly entered, click the Close Year button to carry out the action.

### Holidays, Allocate Holidays –

This option allows you to allocate holidays to a number of employees in you organisation in one action, access the Allocate Holidays option as follows,



Once you have done this follow the wizard (see global pay change) until you have reached this screen,

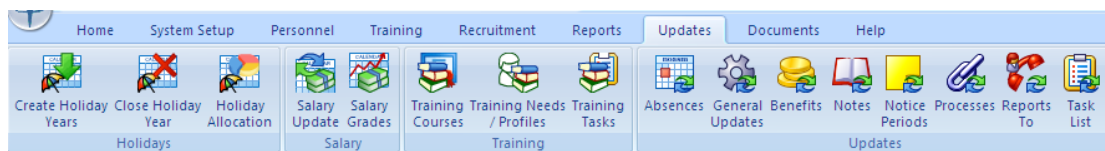


Once you have reached this screen enter that start and end date for the holidays that are to be allocated and add any notes that are required, once this has been done click the finish button to allocate the holidays.

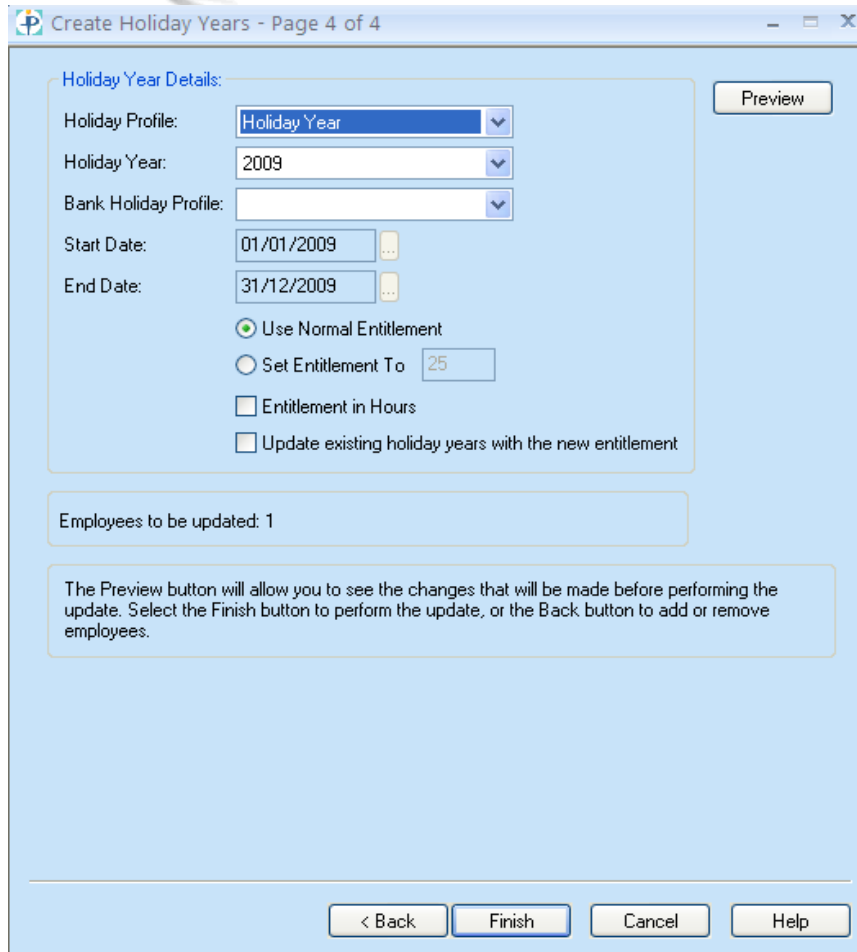
### Holidays, Create Holiday Years-

This option will allow you to create the same holiday year to the employee record.

To access this option click the following,



Once you have done this you will see the wizard screen, follow the steps as show in Global Pay Change until you see this screen,

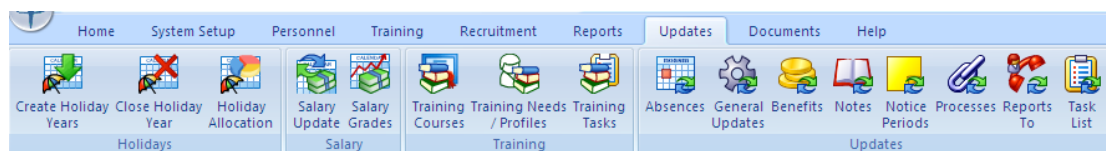


Select the holiday profile and the year, and you can also set the entitlement. Then click on finish.

### Training, Training Needs/Profiles –

This section allows you to add Training Needs or TNA Profiles to employees records, you will only be able to do this if you have purchased the Training Module and have set the Training Module Up.

To access this option click the following,

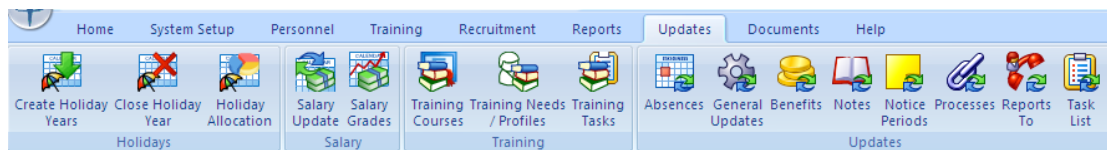


Once you have done this you will see the wizard screen, follow the steps as show in Global Pay Change until you see this screen,

Once you have this screen select the training need or TNA profile you wish to add using the dropdowns and then click finish.

### Training, Training Tasks –

This option allows you to add both Delegate and Course level tasks to Courses that you have previously set up. Access this option by clicking the following,

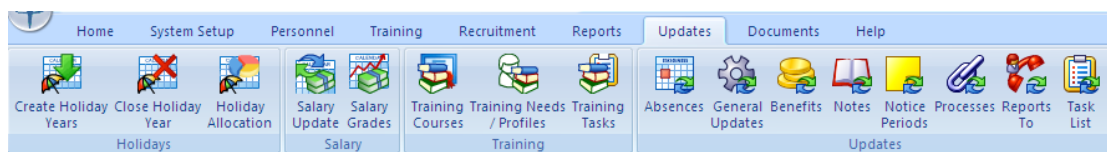


Once you have clicked this you will see the following,

Choose the course you wish to add the task to and then select the type of task you wish to add to the course, once you have done this click the finish button to add the task.

### Absence –

This allows you to add absences to a number of employees in one go, to do this select the following,

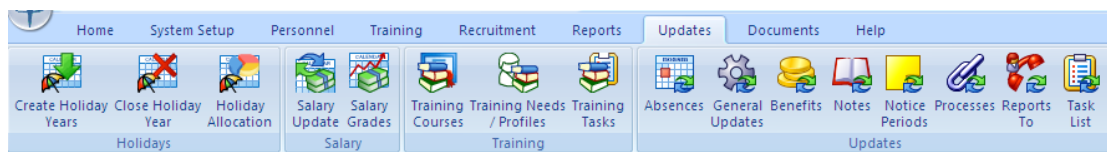


Once you have done this you will see the wizard option, follow the stages as detailed in the Global Pay Change section until you reach this page,

You should then choose the type of absence you wish to add to the employees records and the date these absences occurred, to apply these just click the finish button.

### General Updates-

This option will let you update a number of different options to the employee record. Select the option in the updates screen.

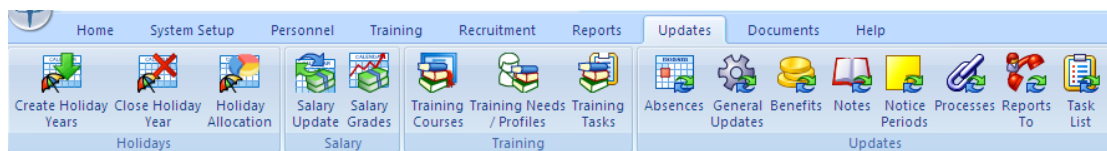


Go through the wizard selecting you employee you wish to update then this last screen will appear.

Select the option you require and then click on finish.

### Benefits –

This allows you to allocate different benefits to a group of employees in one go, to do this click on the following,

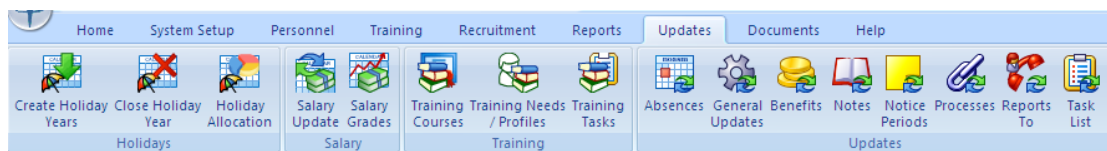


You will then see the wizard screen (see Global Pay Change), follow this process until you see this screen,

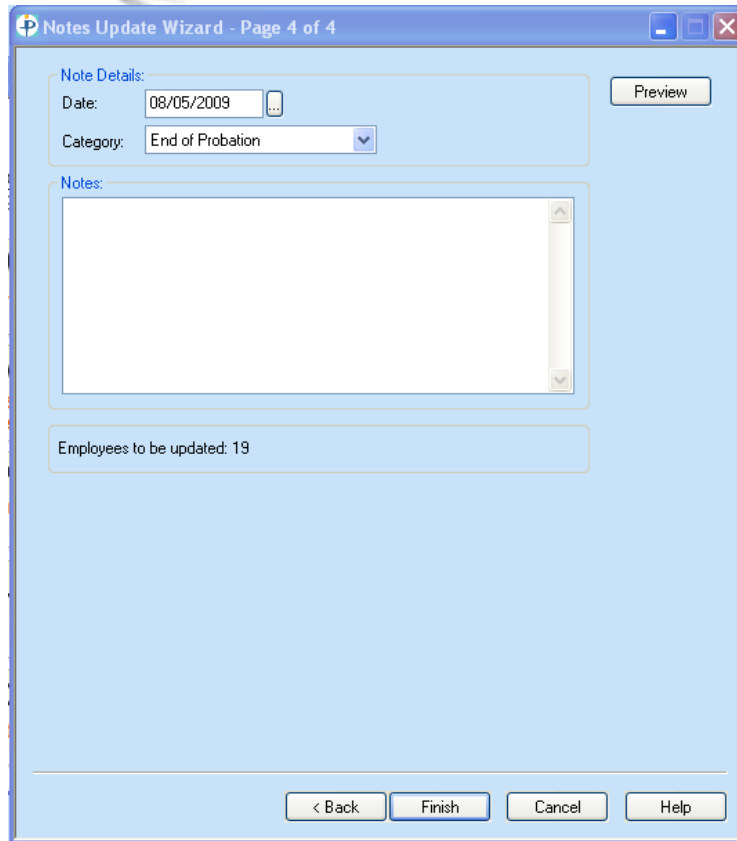
You should then choose the types of benefit that should be allocated to the employees and its values, once you have done this click the finish button.

**Notes –**

This allows you to allocate notes categories and notes to a employees records, to do this click the following,



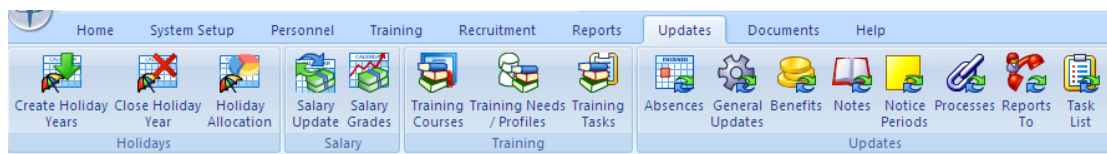
Once you have done this follow the wizard screen to select the correct employees (see Global Pay Change) until you see this screen.



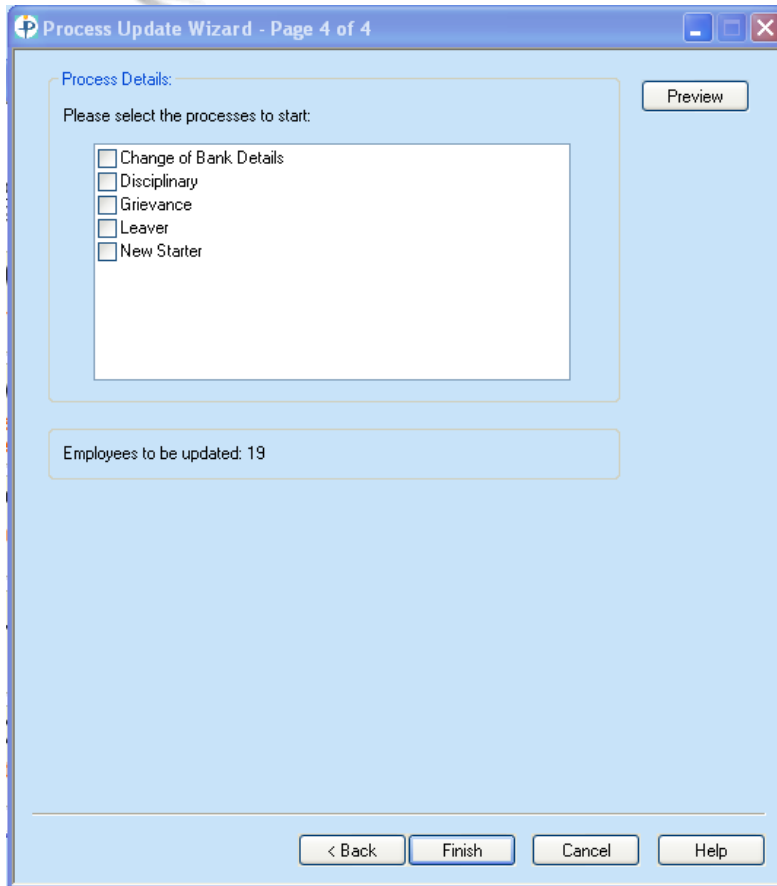
You should then select the type of notes category you require and all in any text you need to the notes box and then click finish.

**Process –**

This allows you to add a process to a number of employees records, to do this click,



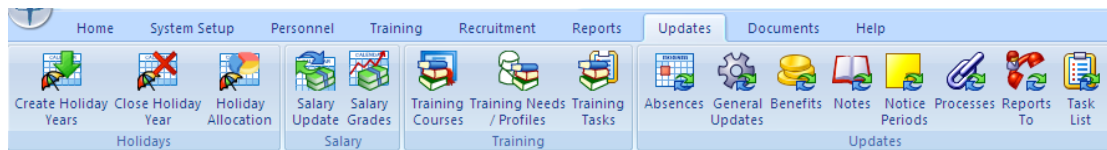
You should then see the wizard screen (see Global Pay Change) follow this process to select the correct employees until you reach the following screen,



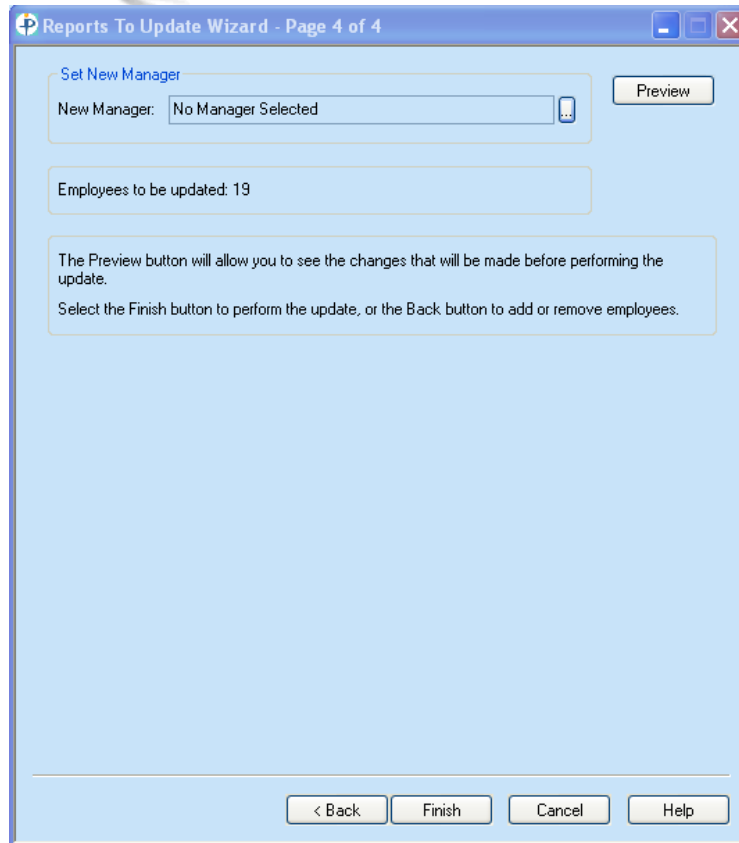
Once you reach this screen simply select the process from the options and then click the finish button.

### Reports to –

This allows you to change the reporting line for employees, to do this select the following,



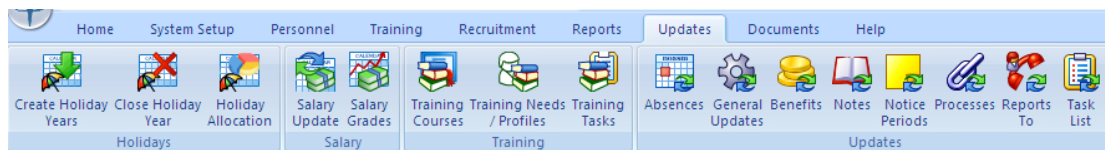
You will the access the wizard (see Global Pay Change), once you have selected the employees you will see this screen,



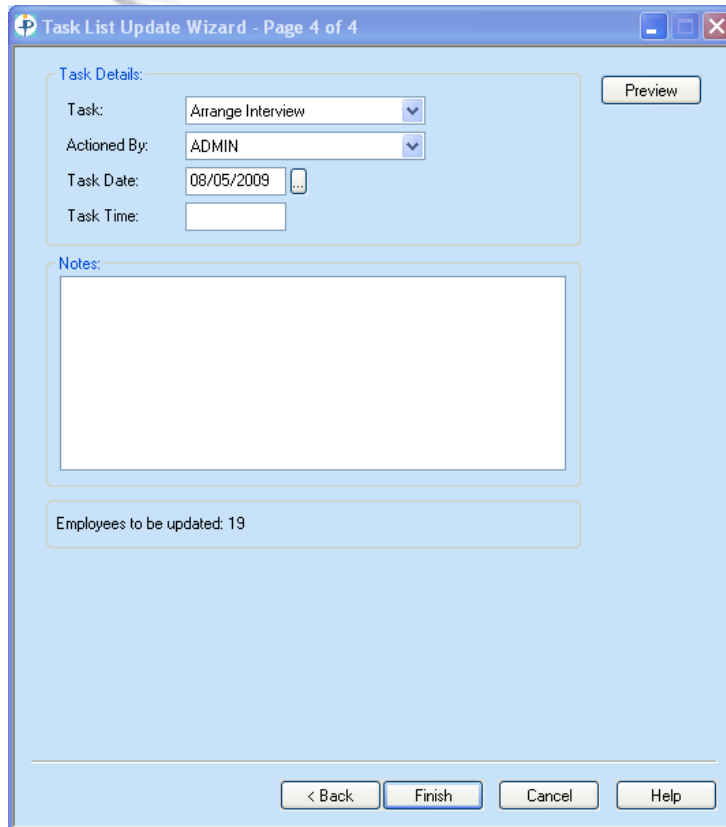
To select the new manager who the selected employees will now report to, click the button next to new manager and chose the new manager from your employee search screen, once you have done this click the finish button.

### Task List –

This option enables you to add a task against a number of employees, to do this select the following,



You should the follow the wizard option (see Global Pay Change) to select the employees to allocate a task against; once you have selected the employees you will see this screen,



Task List Update Wizard - Page 4 of 4

Task Details:

Task: Arrange Interview

Actioned By: ADMIN

Task Date: 08/05/2009

Task Time:

Notes:

Employees to be updated: 19

< Back Finish Cancel Help

You can now chose the type of task, who the tasks has been actioned by and the task time and date, you can also add any notes that are needed, once you have done this click the finish button to allocate the tasks.



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