MecWise™
Human Resource

STARVISION INFORMATION TECHNOLOGY
(SDA)

HUMAN RESOURCE INFORMATION SYSTEM
(HRIS)

USER MANUALS
FOR
EMPLOYEE PROFILE MANAGEMENT SYSTEM

VERSION 1.0

Table of Contents

Human Resources Information System (HRIS)

1 Introduction

MecWise®.*Net HR* is a fully integrated Human Resource system designed for Human Resource Professionals to streamline administration and maximize strategic management. It aids HR to keep track of all the Employees within the organization and empowers them to administer their own requirements.

Features available: -

- ➢ Employee Profile
- ➢ New / Change Appointment, Resignation and Rejoin of Employee
- ➢ Promotion / Merit Increment / Upgrading
- ➢ Termination / Retirement / Resignation
- ➢ Personnel Report
- ➢ Export to Excel Reports

2 Master File Maintenance

You only need to maintain the master files (Admin and Personnel) when there are changes such as creation of new course or country. Otherwise, you may ignore this step.

3 Employee Profile Maintenance

Employee Records maintain employee's current and historical information; records of joining, promotion and resignation.

This module captures and maintains employee's information such as personal particulars, payroll details, next of kin details, bank details, fund details and career progression. It allows creation, amendment or viewing of an employee's record. Each employee is assigned a unique identification number (ID) that will be used in payroll entry.

3.1 Creating an Employee Profile

This option allows users to create an Employee profile for a newly joined employee.

3.1.1 Definition

a)   Definition – Employee Profile Header

No.	Field	Description
1	Employee ID	For 'Add' mode, Employee ID will be auto-generated by system

		based on format: YYNNN (YY-Current Year, NNN-Running No. And resets at beginning of year.
2	Salutation	This field is to capture the salutation of the Employee.
3	Name	This field is to capture the name of the Employee.
4	Alias Name	This field is to capture the alias name of the Employee.
5	Chinese Name	This field is to capture the salutation of the Employee.
6	Building #	This field is to capture the building number of the Employee's address.
7	Flr #	This field is to capture the floor number of the Employee's address.
8	Unit #	This field is to capture the unit number of the Employee's address.
9	Street Name	This field is to capture the Street name of the Employee's address.
10	State Name	This field is to capture the State name of the Employee's address.
11	Postal Code	This field is to capture the postal code of the Employee's address.
12	Country Code	This field is to capture the country code of the Employee's address.
13	Email ID	This field is to capture the email address of the Employee.
14	Home Tel #	This field is to capture the home contact number of the Employee.
15	Office Tel #	This field is to capture the office contact number of the Employee.
16	Hand phone #	This field is to capture the mobile phone number of the Employee.
17	Birth Date	This field is to capture the Date of Birth of the Employee. Calendar is provided for the user to select the date.
18	Birth place	This field is to capture the place of Birth of the Employee. Help key is provided to select from the existing list.
19	Age	This field is to capture the age of the Employee and is generated by the system according to the birth-date.
20	Gender	This field is to capture the gender of the Employee. Help key is provided to select from the existing list.

21	Marital Status	This field is to capture the marital status of the Employee. Help key is provided to select from the existing list.
22	Marriage Date	This field is to capture the date of marriage if the Employee is not single. Calendar is provided for the user to select the date.
23	Citizenship	This field is to capture the citizenship code of the Employee. Help key is provided to select from the existing list.
24	Nationality	This field is to capture the citizenship of the Employee. Help key is provided to select from the existing list.
25	Race	This field is to capture the race of the Employee. Help key is provided to select from the existing list.
26	Dialect	This field is to capture the dialect of the Employee. Help key is provided to select from the existing list.
27	Religion	This field is to capture the religion of the Employee. Help key is provided to select from the existing list.
28	Converted Date	This field is to capture the date when the Employee is converted to Muslim.
29	NRIC/ UIN #	This field is to capture the identification number of the Employee.
30	NRIC Color	This field is to capture the colour the identification card. Help key is provided to select from the existing list.
31	FIN #	This field is to capture the foreigner identification number of the Employee.
32	Passport #	This field is to capture the foreigner passport number of the Employee.
33	Issue Place	This field is to capture the issue place of the identification card. Help key is provided to select from the existing list.
34	Issue Date	This field is to capture the issue date of the identification card. Calendar is provided for the user to select the date.
35	CPF Ref.	This field is to capture the Central Provident Fund reference number of the Employee.
36	CPF Type	This field is to capture the type of CPF. Help key is provided to select from the existing list.
37	Tax Ref.	This field is to capture the income revenue tax reference number of the Employee.
38	CPF Voluntary	This field is to capture the CPF Voluntary. Help key is provided to select from the existing list.

39	Date of Technical Entry	This field is to capture the issue date of the old identification card. Calendar is provided for the user to select the date.
40	Access Code	This field is to capture the access code of the Employee.
41	Include in Headcount	This field is to capture the status of Headcount.
42	Granted Date	This field is to capture the date when the Employee was granted the Permanent Resident. Calendar is provided for the user to select the date.
43	Expiry Date	This field is to capture the P/R expiry date of the Employee. Calendar is provided for the user to select the date.
44	Citizenship Granted Date	This field is to capture the date when the Employee is granted citizenship. Calendar is provided for the user to select the date.
45	W/P #	This field is to capture the Work Permit number of the Employee.
46	Issue Date	This field is to capture the Issue Date of the Work Permit. Calendar is provided for the user to select the date.
47	Expiry Date	This field is to capture the Expiry Date of the Work Permit. Calendar is provided for the user to select the date.
48	Emp Pass #	This field is to capture the Employment Pass number of the Employee.
49	Issue Date	This field is to capture the Issue Date of the Employment Pass. Calendar is provided for the user to select the date.
50	Expiry Date	This field is to capture the Expiry Date of the Employment Pass. Calendar is provided for the user to select the date.
51	NS Code	This field is to capture the National Service code of male Employee. Help key is provided for user to select from the existing list.
52	Place	This field is to capture the place where the National Service is held. Help key is provided for user to select from the existing list.
53	Start Date	This field is to capture the start date of the National Service. Calendar is provided for the user to select the date.
54	End Date	This field is to capture the end date of the National Service. Calendar is provided for the user to select the date.
55	Unit	This field is to capture the unit which the Employee is during National Service.
56	Length of Srv	This field is to capture the length of Employee's National

		Service.
57	Rank	This field is to capture the rank of Employee during National Service.
58	Vocation	This field is to capture the vocation of the National Service.
59	Conduct	This field is to capture the conduct of the National Service. Help key is provided for user to select from the existing list.
60	Performance	This field is to capture the performance of the National Service. Help key is provided for user to select from the existing list.
61	Pay Frequency	This field is to capture the type of payroll frequency. Help key is provided for user to select from the existing list.
62	Tenure of Officer	This field is to capture the tenure of Officer code. Help key is provided for user to select from the existing list.
63	Medical Code	This field is to capture the medical code of the Employee. Help key is provided for user to select from the existing list.
64	MSO CPF	This field is to capture the MSO CPF. Help key is provided for user to select from the existing list.
65	Shift Code	This field is to capture the Shift Code of the Employee. Help key is provided for user to select from the existing list.
66	Employer CPF	This field is to capture the Employer CPF account number. Help key is provided for user to select from the existing list.
67	FWL Type	This field is to capture the Foreign Worker Levy Type of the Employee. Help key is provided for user to select from the existing list.
68	Retire Due date	This field is to capture the retire date of the Employee.
69	Optional Retire	This field is to capture the optional retire date of the Employee.
70	Payment Method	This field is to capture the type of Payment Method.
71	Service: Years	This field is to capture the service year of the Employee.
72	Months	This field is to capture the month of service of the Employee.
73	Calculate	This command calculates the year, month of the Employee's service.
74	Remark	This field is to capture the remark.

3.1.2 Employee Profile Flow

To begin with, go to **Employee Profile > Employee Profile**.

System will show the following screen:

Click on the **Add button** to create a new record.

Enter the Employee information under **Name**, **Address**, **Personal**, **and identification, Foreigner** (if the Employee is non-local), **NS**, **Payroll**, **Remark** and the 21 **Tab**s found below.

You need to fill up those fields that are highlighted, as they are the mandatory fields before you can save the whole record. System will prompt for missing information if you leave out any mandatory field when you are saving the Employee record.

Under the **Identification Tab**, for Employee that contributes to CPF, you need to fill up the **CPF Type**. '1' for normal CPF contribution, 'Y1' is for PR 1st year and 'Y2' is for PR 2nd year. And make sure that the **CPF Ref.** And **Tax Ref.** follows the Employee's NRIC number (which will affect CPFLine and CPFPAL Export).

| Name | Address | Personal | **Identification** | Foreigner | NS | Payroll | Remark | Progression |

NRIC / UIN # — S1175023J	NRIC Color — B (BLUE)
FIN #	Passport #
Issue Place	Issue Date
CPF Ref.	CPF Type
Tax Ref.	CPF Voluntary
Date of Technical Entry	Access Code — BA01
Include in Headcount — Yes	

Click on the CPF Type pick list to choose the CPF Type.

| CPF Ref. | | CPF Type | |

System will launch the Pick List which shows existing CPF type record then select a CPF type by clicking on that record.

CPF_TYPE	CPF_TYPE_DESC	GOVT_CPF_TYPE
0	Not Contributing	
1	Private Sector Employees	PRI-EMPE
2	Non-Pensionable Employees	PUN-EMPE
3	Pensionable Employees	PUP-EMPE
4	Work Permit	
9	Others	
Y1	1st Year PR (Graduated Rates)	PRI-PR-GY1
Y2	2nd Year PR (Graduated Rates)	PRI-PR-GY2

After the record is selected, system will display the select record on the screen.

| CPF Type | 1 (PRI-EMPE) | |

Under the **Payroll Tab**, you need to define **Pay Frequency** (as defined under **Payroll > Master File > Company > Pay Period**, which will affect on the payment time; which is Bi-monthly or Monthly), **Shift Code** (as defined under **Payroll > Master File > Company > Working Hours**, which will affect the prorated salary, no pay leave), **Employer CPF**, **Payment Method**.

For the **21 Tabs** at the below screen, with the respective Tab selected, click on the **New icon** to create new records. The Tabs capture skills sets and Employee's personality assets, which can be used to access Employee's capability.

The system will show below

Qualification

S/N	20
Qual. Type	Qualification
Code	
Description	
School Code	
General Remark	
Start Date	End Date
Attained date	
Created by	Modified By

Education Details

	«	‹	1	›	»	S/N			Quick Search		Add New	Query Builder	Export To Excel

S/N	Subject Code	Subject Description	Subject Grade	Subject Mark	Created Date	Created By	Time Log	User Log

After all the mandatory **Tab**s information are entered, click on the **Save button** and click **Exit** to go back to the previous page and then click **Save button** the Employee Profile main page.

Add Update Delete Search Query Print Move Prev Move Next Save Cancel Exit

Qualification

S/N	10
Qual. Type	Highest Qualification
Code	DEG (Degree)
Description	Degree
School Code	SIM ()
General Remark	
Start Date	End Date
Attained date	05/10/2012
Created by	eplatform 15/10/2013
Modified By	eplatfor 15/10/2013

Education Details

Before the record is saved, the system checks if the required fields are empty. If these fields are empty, system will prompt messages which are shown below. Click on the **OK button** to close the message box and fills the indicated fields. Then save the record again.

If the information entered is correct, the record will be saved into the system.

3.1.3 Updating/Deleting an Employee Profile

To begin with, go to **Employee Profile > Employee Profile**
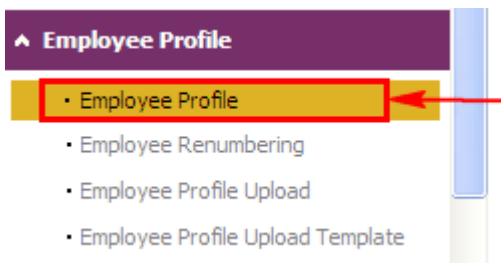
Click on the click on the **Query button** to show the listing of Employees in the Organization.

Then select the Employee record link and click on the **Update button** to make changes.

After making the changes, click on the **Save button**.

> *Note: System does not allow deletion of created Employee profile (even though record maybe wrongly input). Records of resigned Employees are still required to be printed for the IR8A form. An Employee's records can remove by adding his record under Resignation Module*

3.2 New Appointment

After creating a new Employee profile, make sure you create a new appointment record for the new Employee profile. **Prior to data-entry for New Appointment Details, please ensure that the following information have been completed: - Employee Profile, Position Database, Personnel Master File and Payroll Master File.**

3.2.1 Definition

No.	Field	Description
1	Employee	This field is to capture the Employee ID. Help key is provided for user to select from the existing list.
2	Action	This field display the system generated action code (NA).
3	Transaction Date	This field is to capture the date of Created of this

		document. Its default value is the system date.
4	**Organisation Unit**	This field is to capture the **Organisation Unit**. Help key is provided to select from the existing list.
5	Appointment Code	This field is to capture the appointment code. Help key is provided to select from the existing list.
6	**Job Family**	This field is to capture the **Job Family**. Help key is provided to select from the existing list.
7	Division Status	This field is to capture the division status. Help key is provided to select from the existing list.
8	Effective Date	This field is to capture the effective date. Calendar is provided for the user to select the date.
9	Join Date	This field is to capture the joined date. Calendar is provided for the user to select the date.
10	Confirm Date	This field is to capture the confirmation date. Calendar is provided for user to select date.
11	Appointment Date	This field is to capture the appointment date. Calendar is provided for the user to select the date.
12	Next Inctl Date	This field is to capture the next incremental date. Calendar is provided for the user to select the date.
13	Payroll Mode	This field is to capture the payroll mode. Help key is provided to select from the existing list.
14	Salary Code	This field is to capture the current salary code. Help key is provided to select from the existing list.
15	Basic Salary	This field is to capture the basic salary. Help key is provided to select from the existing list.
16	**Cost Centre Code**	This field is to capture the cost centre code. Help key is provided to select from the existing list.
17	Basic 1	This field is to capture the Basic amount 1.
18	NWC Amount	This field is to capture the NWC amount.
19	Monthly Salary	This field display the Monthly Salary = Basic Salary + NPC Amount.
20	Gross Salary	This field display the Gross Salary = Monthly Salary + NPVP Amount.

21	Reason Code	This field is to capture the reason of leaving. Help key is provided to select from the existing list.
22	Position Code	This field is to capture the position code. Help key is provided to select from the existing list.
23	Essential Post	This field is to capture the essential position. Help key is provided to select from the existing list.
24	Essential Category	This field is to capture the essential category. Help key is provided to select from the existing list.
25	**Job Family**	This field is to capture **Job Family**. Help key is provided to select from the existing list.
26	Designation	This field is to capture the designation. Help key is provided to select from the existing list.
27	Appointment	This field is to capture the appointment code of the Employee. Help key is provided to select from the existing list.
28	Title	This field is to capture the title.
29	Progress Remark	This field is to capture the progress remark.
30	Basic 2	This field is to capture the Basic amount 2.

3.2.2   New Appointment Flow

To begin with, go to **Promotion & Progress > New Appointment.**

System will show the following screen:

New Appointment Details

Employee			
Action		Transaction Date	

Current

Organisation Unit		Grade	
Job Family		Appointment Code	
Effective Date		Joined Date	
Confirm Date		Appointment Date	
		Next Inctl Date	

Payroll:

Payroll Mode		Salary Code	
Basic Salary		Cost Centre Code	
Basic 1		NWC Amount	
Basic 2			
Monthly Salary	0.00	Gross Salary	
Reason Code		Position Code	
Essential Post		Essential Category	

Hold Against: Designation:

Job Family		Designation	
Appointment		Title	

Progress Remark	

Click on the **Add button** to create a new record.

Define all the fields highlighted in purple accordingly. Those fields with pick-list are defined under the **Payroll > Master File > Company**. Add or amend the necessary details to suit your Organization needs.

New Appointment Details

Employee	BA01N0003	Cindy Lee		
Action	NA		Transaction Date	07/10/2013

Current

Organisation Unit	CEO-ADMIN-HR		Grade	I
Job Family	HR		Appointment Code	HR-ADMIN
Effective Date	10/01/2011		Joined Date	10/10/2010
Confirm Date	10/01/2011		Appointment Date	10/10/2010
			Next Inctl Date	10/10/2011

Payroll:

Payroll Mode	M		Salary Code	GEN
Basic Salary	2000.00		Cost Centre Code	ADMIN
Basic 1	0.00		NWC Amount	0.00
Basic 2	0.00			
Monthly Salary	2000.00		Gross Salary	2000.00
Reason Code			Position Code	ACC03
Essential Post			Essential Category	

Hold Against: Designation:

Job Family			Designation	
Appointment			Title	

Progress Remark	

After completion, click on the **Save button**

Deleting existing record(s)

If the created record is wrong, click on the **Query button** and select the record that you wanted to delete. Then click on the **Delete button** and the record will be removed permanently.

Updating existing record(s)

If the created record needs amendments, select the Employee ID link and then click on the **Update button** amend the details record. After the changes have been made, click **Save button** to save the changes.

4   Position Database

Introduction of Position Database master files and setup:

Operation Modes available:

- ➢ Addition of New Records.
- ➢ Enquiry and Updating Records.
- ➢ Enquiry and Deletion of Records.
- ➢ Printing of Master File listing.

This sub system consists of 3 Modules.
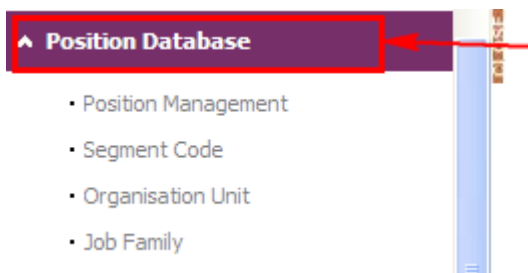
This sub system allows the user to set the Segment Codes relevant to a Organization's structure. Segment Codes form the levels that make up the Organization units existing in a Organization.

Note that the Segment Name is not unique for each organization unit, i.e. multiple segment codes exist for a single segment name.

```
┌─────────────────────────┐ ⎫
│ Segment 0               │ ⎪
│ Finance Department (FIN)│ ⎪
└─────────────────────────┘ ⎪
             │               ⎪
             ▼               ⎬   Organization Unit 1
┌─────────────────────────┐ ⎪   FIN-ACC-ACC1
│ Segment 1               │ ⎪
│ Accounting Section (ACC)│ ⎪
└─────────────────────────┘ ⎪
             │               ⎪
             ▼               ⎪
┌─────────────────────────┐ ⎪
│ Segment 2               │ ⎪
│ Accounting Team         │ ⎪
│ 1(ACC1)                 │ ⎭
└─────────────────────────┘


┌─────────────────────────┐ ⎫
│ Segment 0               │ ⎪
│ Human Resource Dept.(HR)│ ⎪
└─────────────────────────┘ ⎪
             │               ⎪
             ▼               ⎬   Organization Unit 2
┌─────────────────────────┐ ⎪   HR-SPT-CS
│ Segment 1               │ ⎪
│ Support Team (SPT)      │ ⎪
└─────────────────────────┘ ⎪
             │               ⎪
             ▼               ⎪
┌─────────────────────────┐ ⎪
│ Segment 2               │ ⎪
│ Customer Service (CS)   │ ⎭
└─────────────────────────┘
```
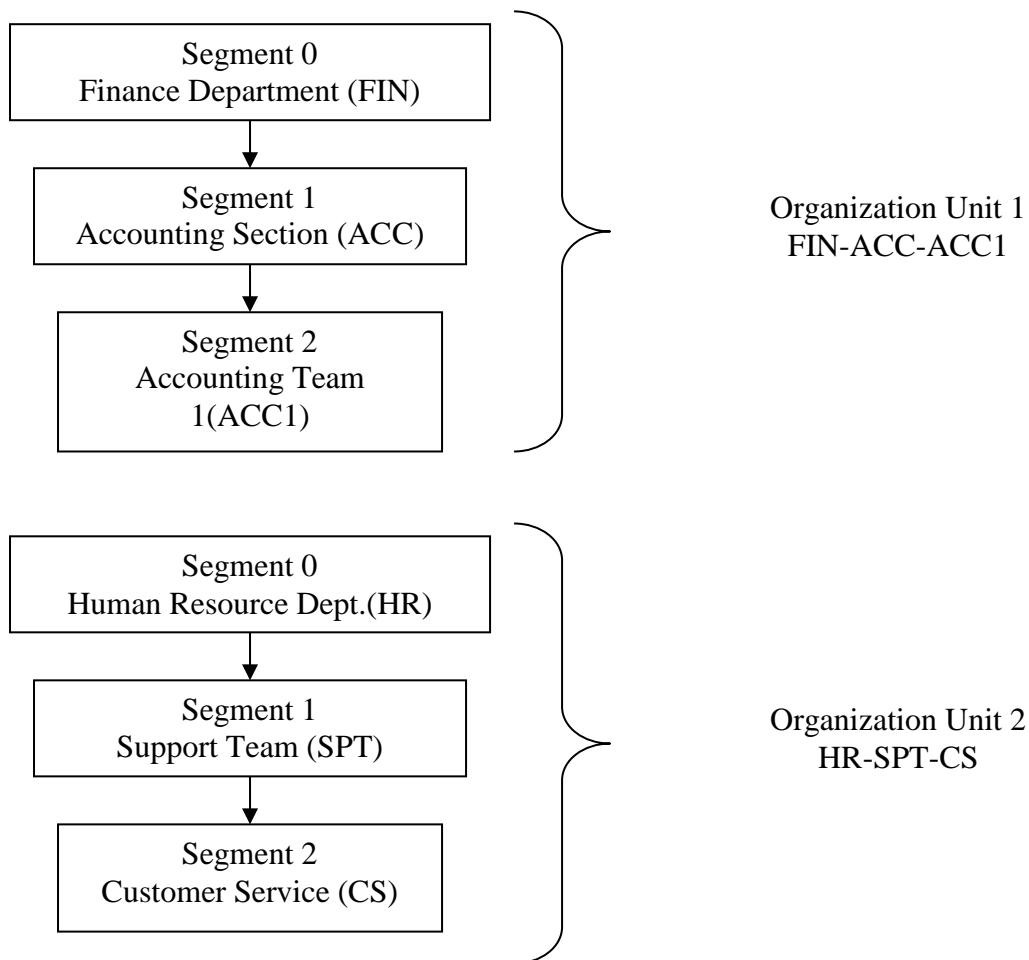
Organisation Unit

This module captures different organization units within the Organization. Reports are available for printing by **Organisation Unit**.

4.1.1   Definition

No	Field	Description
1	**Organisation Unit**	User defined abbreviation representing this Organisation Unit.
2	**Cost Centre**	A pick-list is available to select the **Cost Centre** this organization unit is under.
3	**Segment 0 - 9**	A pick-list is available to pick up the segment from **Segment Code** master file. Note that multiple segment code selected will form an Organisation Unit Code.
4	**Description**	Default from segment code master file as a segment code is selected. User may over-write the description is required.
5	**Created By**	Record created user and created date.
6	**Modified By**	Record modified user and modified date.

4.1.2   Organisation Unit Flow

Click on the **Position Database → Organisation Unit** link from the left menu.

System will show the following screen:

Click the **Add button** to add a new record.

System will show as follow.

User needs to fill the **Cost Centre**, **Segment 0**, etc..

Click the **Save button** to save the record.
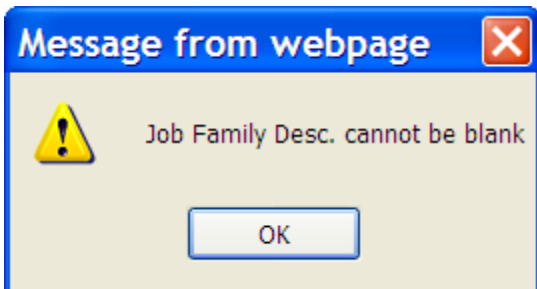
Before the record is saved, the system checks if the required fields are empty. If these fields are empty, system will prompt messages which are shown below. Click on the **OK button** to close the message box and fills the indicated fields. Then save the record again. Below is the sample of the message box prompt.
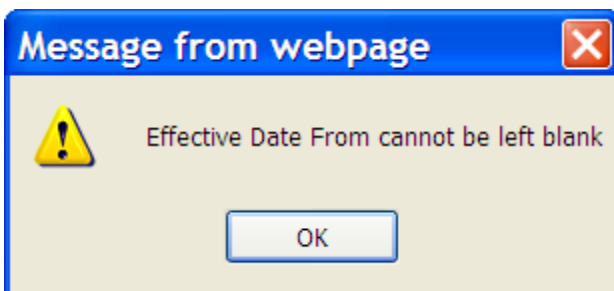

If the information entered is correct, the record will be saved into the system.

4.2 Segment Code

This master file allows entry of different segment code. The different segment code will help to form the organization unit code in the **Organisation Unit Master** file. Note that the organization unit code can accept max 40 characters only.

4.2.1 Definition

No	Field	Description
1	**Segment Name**	Choose from system default drop down list. 10 segments available (0-9).
2	**Segment Code**	Unique code for particular segment defined by user (Max 10 Characters).
3	**Description**	Description for this segment.
4	**Abbr. Description**	Optional abbreviation description for segment.
5	**Created By**	Record created user and created date.
6	**Modified By**	Record modified user and modified date.

4.2.2 Segment Code Flow

Click on the link through the left menu **Position Database** → **Segment Code**
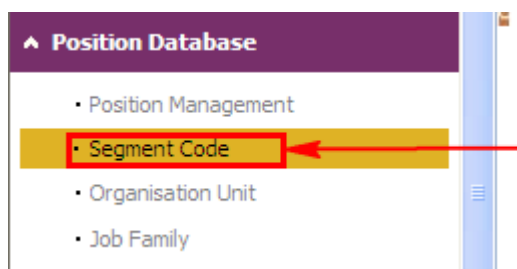
System will show the skill set master screen as below.

Click the **Add button** to add a new record.

User needs to fill the **Segment Name**, **Segment Code** and **Description** Fields.

Click the **Save button** to save the record.

Before the record is saved, the system checks if the required fields are empty. If these fields are empty, system will prompt messages which are shown below. Click on the **OK button** to close the message box and fills the indicated fields. Then save the record again. Below is the sample of the message box prompt.

If the information entered is correct, the record will be saved into the system**.**

4.3 Job Family

This **Job Family** master file screen is for the user to setup/maintain the **Job Family** and description.

4.3.1 Definition

No	Field	Description
1	Job Family Code	This field is to capture the **Job Family** code. Help key is provided for user to select from the existing **Job Family** list.
2	Job Family Description	This field is to capture the **Job Family** description.
3	Probation period	This field is to capture the probation period.
4	Remark	This field is to capture the remark.
5	Eff. Date From	This field is to capture Effective Date From. Calendar is provided for the user to select the date.
6	Eff. Date To	This field is to capture Effective Date To. Calendar is provided for the user to select the date.
7	Created By	Record created user and created date.
8	Modified By	Record modified user and modified date.

4.3.2 Job Family Flow

Click on the link through the left menu **Position Database → Job Family**
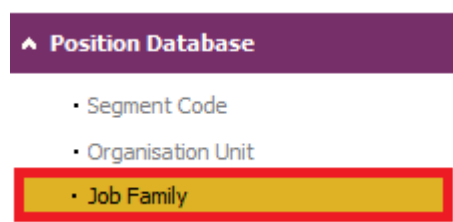
System will show the **Job Family** master screen as below.

Click the **Add button** to add a new record.

User needs to fill the **Job Family Code**, **Probation Period**, **Job Family Description and Remark and Effective Dates Fields**.

Click the **Save button** to save the record.

| Add | Update | Delete | Search | Query | Print | Move Prev | Move Next | Save | Cancel | Exit |

Job Family Master

Job Family Code: FIN   Probation period: 3   Month(s)
Job Family Desc.: Finance
Remark:
Effective Date From: 01/01/2006   Effective Date To: 01/01/2099
Created by: dbo 10/01/2007   Modified by: dbo 01/11/2011

Before the record is saved, the system checks if the required fields are empty. If these fields are empty, system will prompt messages which are shown below. Click on the **OK button** to close the message box and fills the indicated fields. Then save the record again.

Or

Message from webpage
⚠ Job Family Desc. cannot be blank
OK

Or

Message from webpage
⚠ Job Family Desc. cannot be blank
OK

Or

Message from webpage
⚠ Effective Date From cannot be left blank
OK

If the information entered is correct, the record will be saved into the system**.**

To add detail information

Click on the click on the **Query button** to view the existing record (s).

Then select a record to add detail information and click on the **Update button** to make changes.

Click the **Add button** to create the detail record of Appointment Code.

The System will show the screen below.

User needs to fill the Appointment Code, Description and Abbrev. Description.

Click the **Save button** to save the record.

If the information entered is correct, the record will be saved into the system**.**

Click the **Add button** to create the detail record of Salary Code.

User needs to fill the **Salary Code, Salary Range From /To Fields**.

Click the **Save button** to save the record.

If the information entered is correct, the record will be saved into the system**.**

Click **Exit button** to go to the previous Header screen.
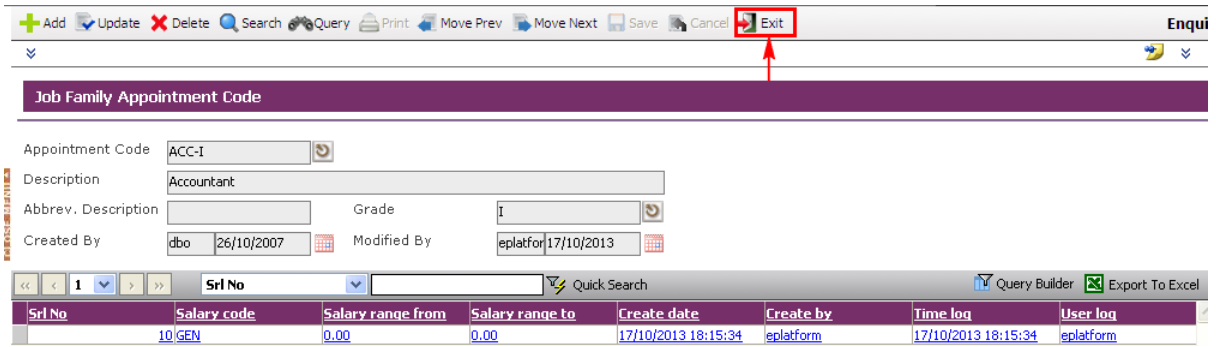
Click **Save button** to save the changes.
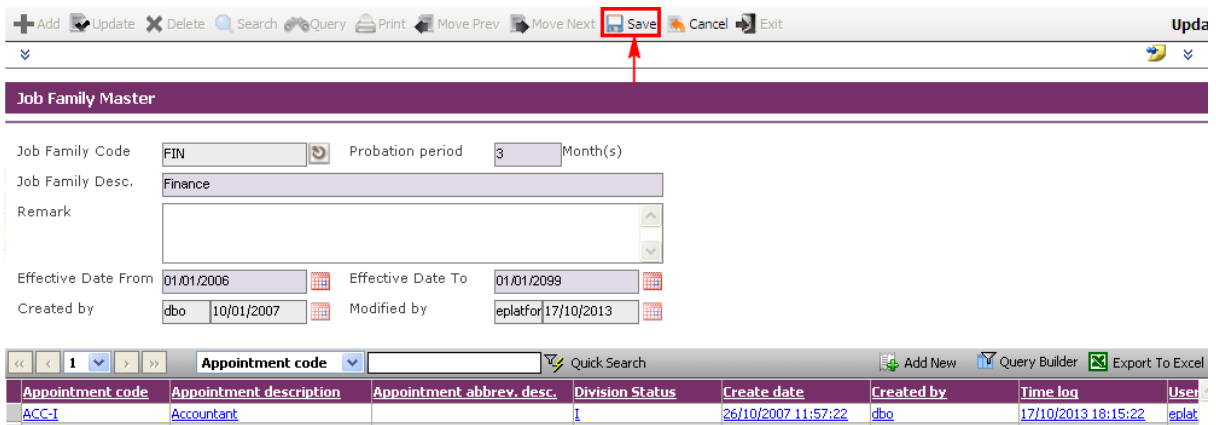
5 Promotion & Progress

This module caters for joining and confirmation of new Employee; promotion, upgrading, increment progression for an Employee. Personal information pertaining to the Employee, HR-related matters and information as well as payroll-related matters and information are duly captured and stored.

This system consists of the following sub-systems listed as below:
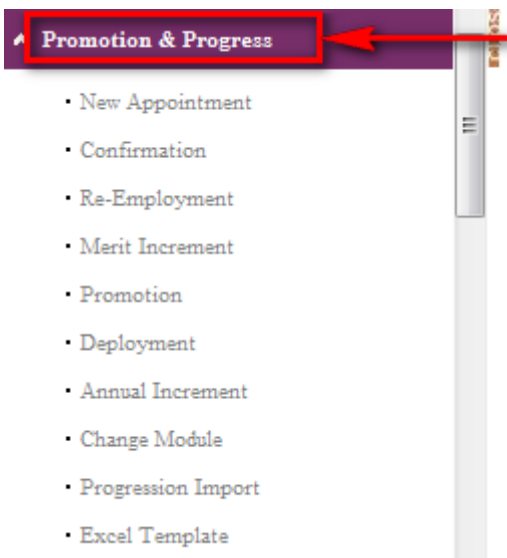
Updating of Appointment

After an Employee has been assigned with a new appointment, changes can be made under the Promotion & Progress to track the changes.

5.1.1   Updating New Appointment

To begin with, go to **Promotion & Progress → New Appointment.**

System will show the following screen:

New Appointment Details

Employee			
Action		Transaction Date	

Current

Organisation Unit		Grade	
Job Family		Appointment Code	
Effective Date		Joined Date	
Confirm Date		Appointment Date	
		Next Inctl Date	

Payroll:

Payroll Mode		Salary Code	
Basic Salary		Cost Centre Code	
Basic 1		NWC Amount	
Basic 2			
Monthly Salary	0.00	Gross Salary	
Reason Code		Position Code	
Essential Post		Essential Category	

Hold Against: ### Designation:

Job Family		Designation	
Appointment		Title	

Progress Remark

Click on the **Query button** show a listing of Employees in the Organization.

The list of Employee will be shown in the header browse.

Select the desire Employee from the listing and the information will be displayed on the page. Then click on the **Update button** to make changes.

New Appointment Details

Employee	BA01N0003	Cindy Lee		
Action	NA	Transaction Date	07/10/2013	

Current

Organisation Unit	CEO-ADMIN-HR	Grade	I
Job Family	HR	Appointment Code	HR-ADMIN
Effective Date	10/01/2011	Joined Date	10/10/2010
Confirm Date	10/01/2011	Appointment Date	10/10/2010
		Next Inctl Date	10/10/2011

Payroll:

Payroll Mode	M	Salary Code	GEN
Basic Salary	2000.00	Cost Centre Code	ADMIN
Basic 1	0.00	NWC Amount	0.00
Basic 2	0.00		
Monthly Salary	2000.00	Gross Salary	2000.00
Reason Code		Position Code	ACC03
Essential Post		Essential Category	

Hold Against:

Job Family		Designation	
Appointment		Title	

Progress Remark	

After making changes, click on the **Save button**

5.2 Confirming an Employee

This module records confirmation of Employee after his/her probation period.

5.2.1 Definition

No.	Field	Description
1	Progress No	This field display the system generated Run Number of this document.
2	Transaction Date	This field is to capture the date of Created of this document. Its default value is the system date.
3	Action	This field display the system generated action code (RJ).
4	Confirmation Date From/To	This field is to capture the date of Confirmed of this document. Its default value is the system date.
5	Organisation Unit	This field is to capture the Organisation as search criteria.
6	Job Family	This field is to capture the Job Family as search criteria.
7	Division Status	This field is to capture the division status as search criteria.
8	Appointment From	This field is to capture the appointment code from range as search criteria.
9	Appointment To	This field is to capture the appointment code to range as

10	Circulation Status	This field is to capture the **Circulation Status** of the document in the workflow. Help key is provided for user to select from the existing list.

(continued from previous row) search criteria.

5.2.2   Confirmation Flow

To begin with, go to **Promotion & Progress > Confirmation**.

The System will show the following screen:

Click on the **Add button** to add a new record.

Define the **Confirmation Date From** and **To** which the newly joined Employees confirmation date fall between this periods.

There are 2 ways to select the respective Employee/Employees entitled to this confirmation.

1) Specify the **Organisation Unit**, **Job Family**, Division Status, Appointment From and Appointment To for the filtering.

2) Click on the **Criteria button** to show the Query builder to select specific Employee base on an Employee progression (e.g. Organisation Unit, Appointment Code, etc).

Define the criteria from the Query builder.

- (i)   Select parameter that you want to filter
- (ii)   Click this **button** to see the selected parameter list
- (iii) Select record to set
- (iv)   Click Insert **button** to place the criteria
- (v)   Click **OK button** to filter the record

After defining the criteria from the Query builder, click on the corresponding **Check button** to see if the query retrieves the correct Employee records.
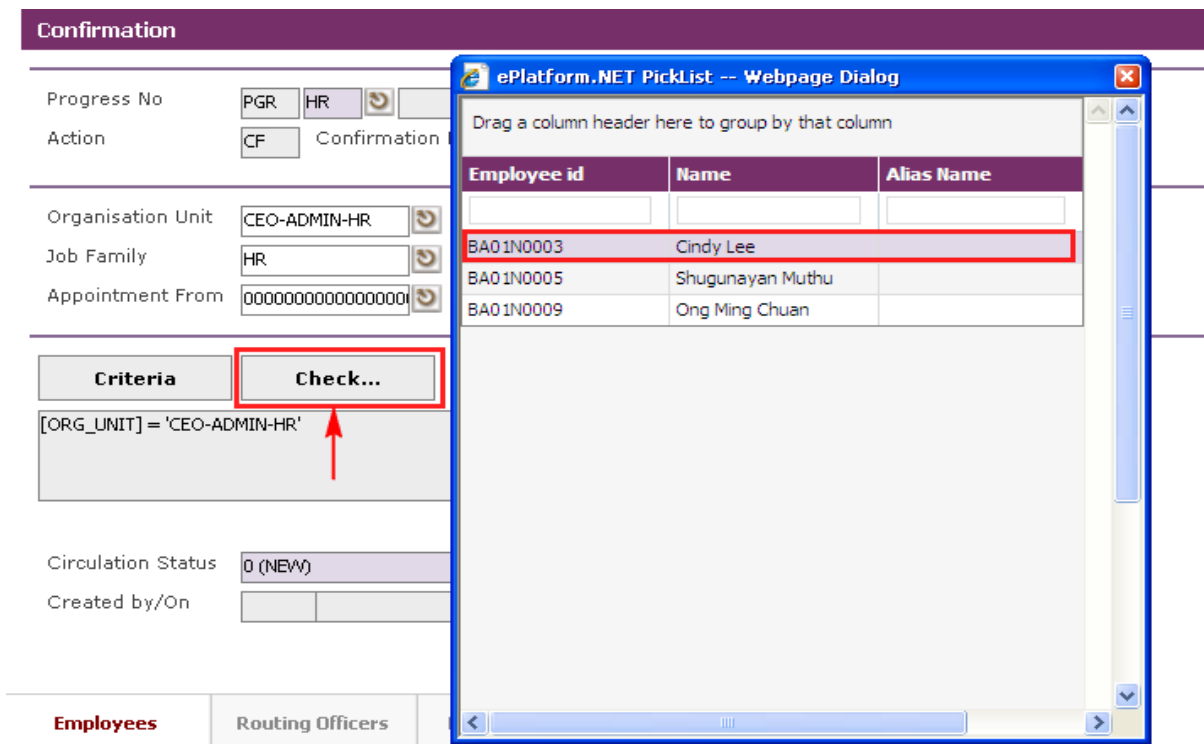
Note: The **List Employees button** will display a list of Employees based on the selection filtering done in a. and b and in Section 4.1.3. Thus, all fields left as default denote all the records.

After specifying the conditions for the specific group of Employees for confirmation, click on the **List Employees button** to select the desire Employee(s).

3) Click to **List Employees button.** Select the Employee ID and Click **Close button**.
   The selected Employee(s) are added under the **Employees Tab**.

Under the **Employees Tab**, click the Employee record and select the **New icon** to check that the **Approval** status must reflect as 'A' (approve) for the specify Employee confirmation to take effect. Then click on **Exit button** to return to previous page.

Add   Update   Delete   Search   Query   Print   Move Prev   Move Next   Save   Cancel   Exit

Confirmation Details

Employee	BA01N0006	Amy Chan	
New Action	CF	Prev. Action	NA

Current | New

Organisation Unit	CEO-OPER-SALES-CUST!	Grade	IV
Job Family	SALES	Appointment Code	SALESCLK
Approval	A	Appointment Date	01/01/2011
Period		Effective Date	01/01/2011
Status	P	Commencement Date	01/01/2011
		Incremental Date	01/01/2012
		Confirmation Date	01/04/2011

Payroll Mode	M	Salary Code	GEN
Basic Salary	3000.00	Cost Centre Code	SALES
Basic 1	0.00	NWC Amount	0.00
Basic 2	0.00		
Monthly Salary	3000.00	Gross Salary	3000.00

Reason Code		Essential Post / Cat	/

Hold Against:		**Designation:**	
Job Family		Designation Code	
Appointment		Title	

| Progress Remark | | | |

Change **Circulation Status** to one of the following status to proceed:
'0' (NEW) , '1' (SUBMIT), '3' (APPROVED), '4' (REJECT)
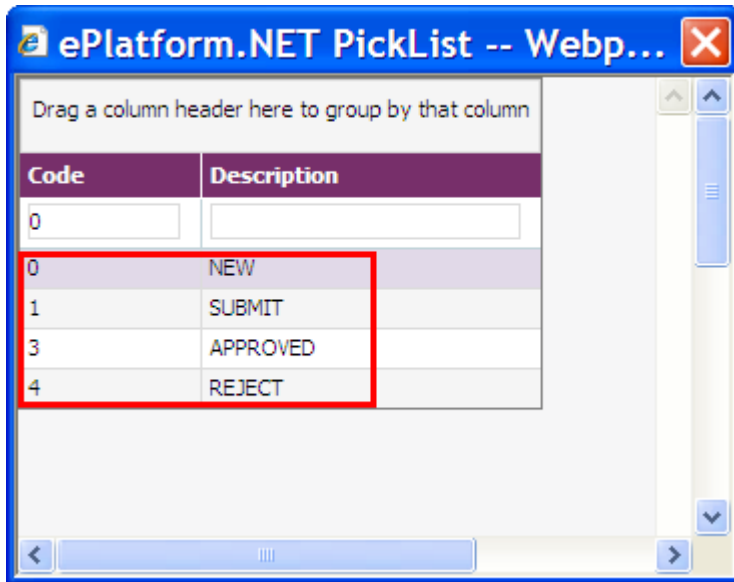
If there is no need to route this progression to other personnel's approval to approve this, just set the **Circulation Status** to '3' (APPROVED). However, if there is a need for other personnel's approval, set the **status** to '1' (SUBMIT).

If **Circulation Status** is set to '1' (SUBMIT), there is a need to entry for the **Routing Officer Tab** to add the respective recommender or approver (Email will be send to them respective to seek for their approval).
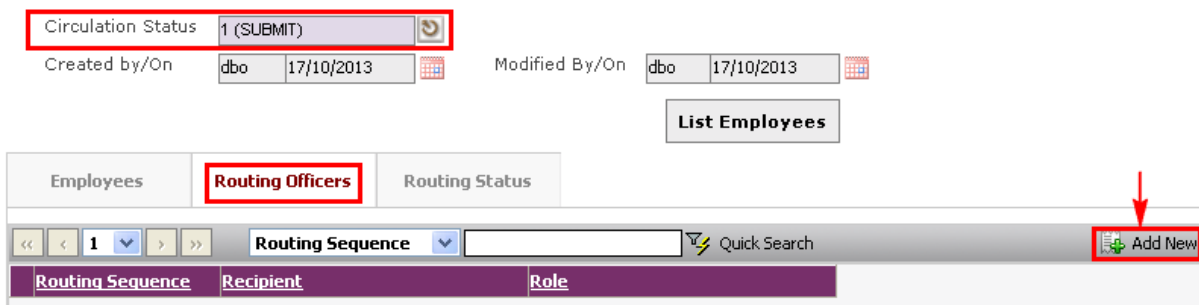
The system will show the following screen:
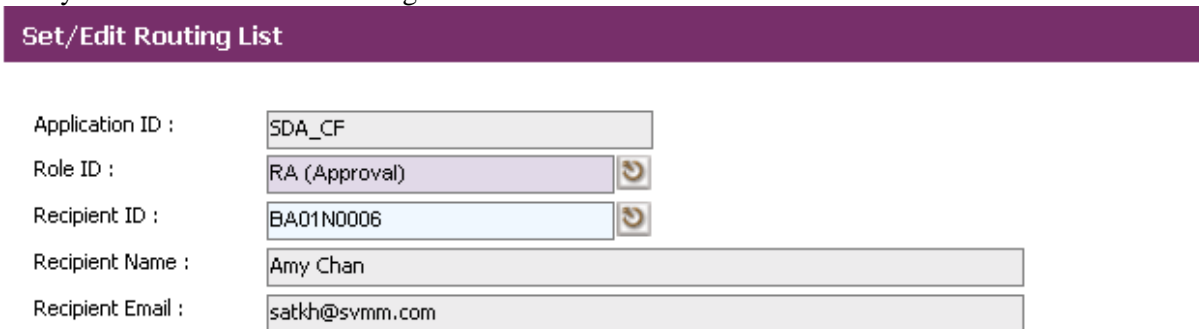
After setting up the Routing list, click **Exit** to go back to main page.

Once the entry is saved, the record cannot be updated or deleted and the **Circulation Status** is to be set to '1' (SUBMIT), '3' (APPROVED), '4' (REJECT).

Re-Employment

This module is used to perform re-employment for certain employee(s) who are going to retired in a few months and has been approved do re-employment within organisation.

5.2.3   Definition

No.	Field	Description
1	Progress No	This field display the system generated Run Number of this document.
2	Transaction Date	This field is to capture the date of Created of this document. Its default value is the system date.
3	Action	This field displayed the system generated action code (AI).
4	**Organisation Unit**	This field is to capture the **Organisation** as search criteria.
5	**Job Family**	This field is to capture the **Job Family** as search criteria.
6	Division Status	This field is to capture the division status as search criteria.
7	Appointment From	This field is to capture the appointment code from range as search criteria.
8	Appointment To	This field is to capture the appointment code to range as search criteria.

9	Progress Remark	This field is to capture any progress remark.
10	Circulation Status	This field is to capture the **Circulation Status** of the document in the workflow. Help key is provided for user to select from the existing list.

5.2.4   Re- Employment Flow

To begin with, go to **Promotion & Progress > Re-Employment.**

The System will show the following screen:

Click on the **Add button** to add a new record.

Click on the **List Employees** to choose individual or several Employees from a listing entitled for this progression. Then click on the **Close button**.

The selected Employee(s) are added automatically under the **Employees Tab**.
To update employee information, click on the Employee's record link under the **Employees Tab**.

When the detail screen is shown as follows:

Re-Employment

Employee	BA01N0001	Tammy Leong	
New Action	CF	Prev. Action	NA

Current | New

Organisation Unit	CEO	Division Status	IV
Job Family	TOP-MGMT	Appointment Code	CEO
Effective Date	01/01/2010	1st Joined Date	01/01/2010
Review Date		Prev Appt Date	01/01/2010
Confirm Date	01/01/2010	Incremental Date	01/01/2011
Status/Approval	P / A	Last day of service	

Payroll Mode	M	Salary Code	GEN
Basic Salary	6000.00	Cost Centre Code	CEO
Basic 1	0.00	NWC Amt	100.00
Basic 2	100.00		
Monthly Salary	6100.00	Gross Salary	6200.00

Reason Code		

Hold Against: | | **Designation:**
Job Family		Designation Code	
Appointment		Title	
Progress Remark			

Click on the **New Tab**, to update information.

Update employee information such as salary information, division, Job Family, etc.

After the changes has been made, click on the **Save button** to save the record.

Re-Employment

| Employee | BA01N0001 | Tammy Leong | |
| New Action | CF | Prev. Action | NA |

Current | **New**

Organisation Unit	CEO	Division Status	IV
Job Family	TOP-MGMT	Appointment Code	CEO
Effective Date	01/01/2010	Joined Date	01/01/2010
Review Date	01/01/2010	Appointment Date	01/01/2010
Confirm Date	01/01/2010	Next Inctl Date	01/01/2011
Status	P	Approval	A
		Last day of service	

Payroll Mode	M (Monthly)	Salary Code	GEN
Basic Salary	6000.00	Cost Centre Code	CEO
Basic 1	0.00	NWC Amount	100.00
Basic 2	100.00		
Monthly Salary	6100.00	Gross Salary	6200.00

| Reason Code | |

Hold Against: | **Designation:**

Job Family		Designation	
Appointment		Title	
Progress Remark			

To go to the previous header screen, click on the **Exit button**.

Re-Employment

| Employee | BA01N0001 | Tammy Leong | |
| New Action | CF | Prev. Action | NA |

Change **Circulation Status** to one of the following status to proceed:
'0' (NEW), '1' (SUBMIT), '3' (APPROVED), '4' (REJECT)

If there is no need to route this progression to other personnel's approval to approve this, just set the **Circulation Status** to '3' (APPROVED).

If **Circulation Status** is set to '1' (SUBMIT), then routing officer(s) information needs to be inserted the **Routing Officer Tab** to route to the respective recommender or approver (Email will be send to them respective to seek for their approval).

Click on the **Add New button** in the **Routing Officers Tab**.

The System will show the following screen:

After setting up the Routing list, click **Exit button** to go back to main page.

Click on the **Save button** to save the record..

To view progression history, go to Employee Profile → Employee Profile Screen.
 Select on the desired employee to retrieve employee information.
Click on the **Progression** to check on the progression history records.

5.4 Creating a Merit Increment

This module is to maintain salary increment in employees' progression.

5.4.1. Definition

No.	Field	Description
1	Progress No	This field display the system generated Run Number of this document.
2	Transaction Date	This field is to capture the date of Created of this document. Its default value is the system date.
3	Action	This field display the system generated action code (RJ).
4	Effective Date	This field is to capture the Effective Date of this document. Its default value is the system date.
5	**Organisation Unit**	This field is to capture the **Organisation** as search criteria.
6	**Job Family**	This field is to capture the **Job Family** as search criteria.
7	Division Status	This field is to capture the division status as search criteria.
8	Appointment From	This field is to capture the appointment code from range as search criteria.

9	Appointment To	This field is to capture the appointment code to range as search criteria.
10	Increment Percent	This field is to capture the increment percent.
11	Increment Amount	This field is to capture the increment amount.
12	Circulation Status	This field is to capture the **Circulation Status** of the document in the workflow. Help key is provided for user to select from the existing list.

5.4.2. Merit Increment Flow

To begin with, go to **Promotion & Progress > Merit Increment**.

The System will show the following screen:

Merit Increment

Progress No	PGR	Transaction Date
Action		Effective Date

Organisation Unit

Job Family   Grade

Appointment From   Appointment To

Criteria   Check...

Increment Percent   Increment Amount

Circulation Status

Created by/On   Modified By/On

List Employees

Click on the **Add button** to add a new record.

Add   Update   Delete   Search   Query   Print   Move Prev   Move Next   Save   Cancel   Exit

Merit Increment

Progress No	PGR	Transaction Date
Action		Effective Date

Organisation Unit

Job Family   Grade

Appointment From   Appointment To

Criteria   Check...

Increment Percent   Increment Amount

Circulation Status

Created by/On   Modified By/On

List Employees

Enter the **Effective Date** (Merit Increment) to record when the progression is going to take effect from.

There are two ways to select the respective Employee/Employees entitled to this progression.

1) Click on the **Criteria button** to show the Query builder to select specific Employee for this progression.

Define the criteria from the Query builder.

(i)   Select parameter that you want to filter
(ii)   Click this **button** to see the selected parameter list
(iii)   Select record to set
(iv)   Click Insert **button** to place the criteria
(v)   Click **OK button** to filter the record

After defining the criteria from the Query builder, click on the **Check button** to see if the query retrieves the correct Employee records.

*Note: The **Check button** will show the Employee records that are defined with the **Criteria button** and also the **Organisation Unit**, Job Family, Grade, Appointment From and Appointment To. Thus, a "%" denotes all the records.*

2) Alternatively, user can click on the **List Employees** to choose individual or several Employees from a listing entitled for this progression. Then click on the **Close button**

The selected Employee(s) are added under the **Employees Tab**.

Enter either **Increment Percentage** or **Increment Amount** given to the Employee(s) defined.
(If either of the two above fields is filled, then the system will increase salary based on the entered value for *ALL* employees listed in the **Employees Tab**.)

If increment is different for all individual Employees, you need not enter the Increment percentage or amount. You need to select each Employee's record link under the **Employees Tab**.

When the details are shown, click on the **New Tab**. Enter the increment amount at the NWC Amount and then click on the **Save button** to save the changes.

To modify next employee information, click on the Header Browse to view employee list.
Then click on a desired employee record to update.

Click on the **Update button** to update.

Click on the **New Tab** to update. Change necessary information such as salary information.

After the changes have been made, click on the **Save button** to save.

To go back to the previous header screen, click on the **Exit button**.

Change **Circulation Status** to one of the following status to proceed:
'0' (NEW), '1' (SUBMIT), '3' (APPROVED), '4' (REJECT)

If there is no need to route this progression to other personnel's approval to approve this, just set the **Circulation Status** to '3' (APPROVED).

If **Circulation Status** is set to '1' (SUBMIT), then routing officer(s) information needs to be inserted the **Routing Officer Tab** to route to the respective recommender or approver (Email will be send to them respective to seek for their approval).

Click on the **Add New button** in the **Routing Officers Tab**.

The System will show the following screen:

Set/Edit Routing List

Application ID :   SDA_MI

Role ID :

Recipient ID :

Recipient Name :

Recipient Email :

After setting up the Routing list, click **Exit button** to go back to main page.

Click on the **Save button** to save.
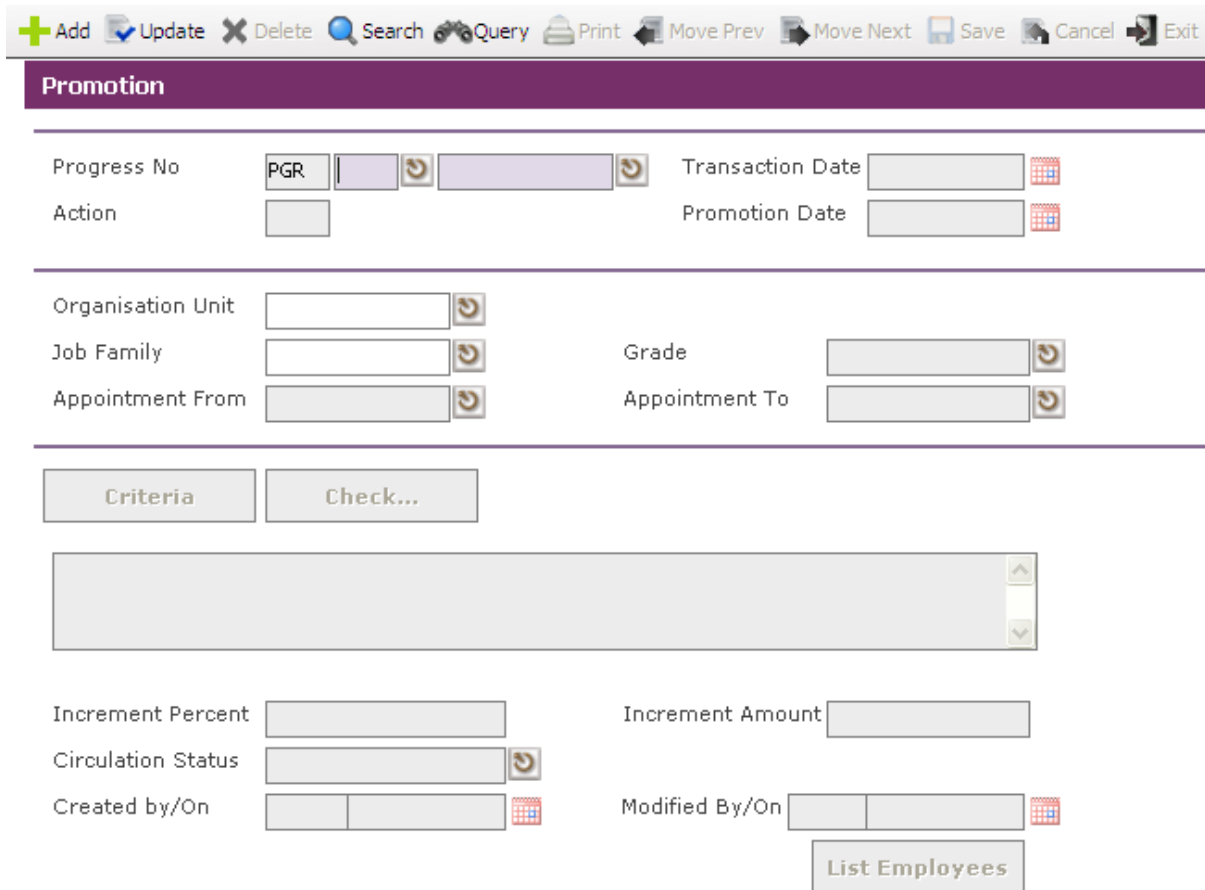
To view progression history, go to **Employee Profile → Employee Profile** Screen.
 Select on the desired employee to retrieve employee information.
Click on the **Progression Tab** to check on the progression history records.

5.5 Promotion of an Employee

This module is used to keep track of employee's promotion in the organisation.

5.5.1 Definition

No.	Field	Description
1	Progress No	This field display the system generated Run Number of this document.
2	Transaction Date	This field is to capture the date of Created of this document. Its default value is the system date.
3	Action	This field display the system generated action code (RJ).
4	Promotion Date	This field is to capture the Promotion Date of this document. Its default value is the system date.
5	Organisation Unit	This field is to capture the Organisation as search criteria.
6	Job Family	This field is to capture the Job Family as search criteria.
7	Division Status	This field is to capture the division status as search criteria.

8	Appointment From	This field is to capture the appointment code from range as search criteria.
9	Appointment To	This field is to capture the appointment code to range as search criteria.
10	Increment Percent	This field is to capture the increment percent.
11	Increment Amount	This field is to capture the increment amount.
12	Circulation Status	This field is to capture the Circulation Status of the document in the workflow. Help key is provided for user to select from the existing list.

5.5.2 Promotion Flow

To begin with, go to **Promotion & Progress > Promotion**.

The System will show the following screen:

Click on the **Add button** to add a new record.

Enter the **Promotion Date** to record when this progression is going to take effect from.

There are 2 ways to select the respective Employee/Employees entitled to this progression.

1) Click on the **Criteria button** to show the Query builder to select specific Employee for this progression.

Define the criteria from the Query builder.

(i)   Select parameter that you want to filter

(ii)   Click this **button** to see the selected parameter list
(iii)   Select record to set
(iv)   Click Insert **button** to place the criteria
(v)   Click **OK button** to filter the record

After defining the criteria from the Query builder, click on the **Check button** to see if the query retrieves the correct Employee records.

*Note: The **Check button** will show the Employee records that are defined with the **Criteria button** and also the **Organisation Unit**, Job Family, Grade, Appointment From and Appointment To. Thus, a "%" denotes all the records.*

2) Click on the **List Employees** to choose individual or several Employees from a listing entitled for this progression. Then click on the **Close button** to add.

The selected Employee(s) are added under the **Employees Tab**.

Enter either **Increment Percentage** or **Increment Amount** given to the Employee(s) defined.
(If either of the two above fields is filled, then the system will increase salary based on the entered value for *ALL* employees listed in the **Employees Tab**.)

If increment is different for all individual Employees, you need not enter the Increment percentage or amount. You need to select each Employee's record link under the **Employees Tab**.

When the details are shown, click on the **New Tab** to update.

Enter new information for promotion and then click on the **Save button** to save the changes.

Promotion Details

Employee	BA01N0001		Tammy Leong	
New Action	PM	Prev. Action	CF	

Current | **New**

Organisation Unit	CEO	Grade	IV
Job Family	TOP-MGMT	Appointment Code	
Approval	A	Appointment Date	01/01/2010
Status	P	Next Inctl Date	01/01/2011
		Effective Date	01/10/2013

Payroll Mode		Salary Code	GEN
Basic Salary	6000.00	Cost Centre Code	CEO
Basic 1	0.00	NWC Amount	100.00
Basic 2	100.00		
Monthly Salary	6100.00	Gross Salary	6200.00

Reason Code		Essential Post	
Position Code	ACC01	Essential Category	

Hold Against:

Job Family	
Appointment	

Designation:

Designation	
Title	

Progress Remark	

To modify next employee information, click on the Header Browse to view employee list. Then click on a desired employee record to update.

Employee ID	Org Unit	Scheme of Service	Appointment Code	Division Status	Effective date	Appointment Date	Incremental Date	Cost Centre Code	Salary Code	Basic Salary	NPC Amt	NPVP Amt	Gross Salary	Designa
BA01N0005	CEO-ADMIN-HR	HR	HR-ADMIN	I	01/04/2010	01/01/2010	01/01/2011	ADMIN	GEN	0.00	0.00	0.00	0.00	

Click on the **Update button** to update.

Click on the **New Tab** to update. Change necessary information such as salary information.

After the changes have been made, click on the **Save button** to save.

To go back to the previous header screen, click on the **Exit button**.

Change **Circulation Status** to one of the following status to proceed:
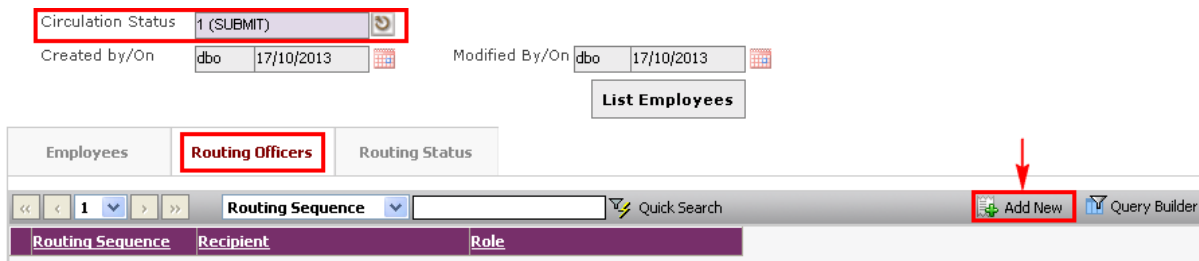'0' (NEW), '1' (SUBMIT), '3' (APPROVED), '4' (REJECT)

If there is no need to route this progression to other personnel's approval to approve this, just set the **Circulation Status** as '3' (APPROVED).

If **Circulation Status** is set as '1' (SUBMIT), then routing officer(s) information needs to be inserted the **Routing Officer Tab** to route to the respective recommender or approver (Email will be send to them respective to seek for their approval).

Click on the **Add New button** in the **Routing Officers Tab**.

The System will show the following screen:

After setting up the Routing list, click **Exit button** to go back to main page.

Click on the **Save button** to save the record.

To view progression history, go to **Employee Profile → Employee Profile** Screen.
 Select on the desired employee to retrieve employee information.
Click on the **Progression Tab** to check on the progression history records.

5.6 Creating deployment for Employee(s)

This module is used to keep track of employee's deployment within the organisation.

5.6.1. Definition

No.	Field	Description
1	Progress No	This field display the system generated Run Number of this document.
2	Transaction Date	This field is to capture the date of Created of this document. Its default value is the system date.
3	Action	This field display the system generated action code (RJ).
4	**Organisation Unit**	This field is to capture the **Organisation** as search criteria.
5	**Job Family**	This field is to capture the **Job Family** as search criteria.
6	Division Status	This field is to capture the division status as search criteria.
7	Appointment From	This field is to capture the appointment code from range as search criteria.
8	Appointment To	This field is to capture the appointment code to range as search criteria.
10	Remark	This field is to capture any remark.
11	Circulation Status	This field is to capture the **Circulation Status** of the document in the workflow. Help key is provided for user to select from the existing list.

5.6.2 Deployment Flow

To begin with, go to **Promotion & Progress > Deployment.**

The System will show the following screen:

Click on the **Add button** to add a new record.

There are 2 ways to select the respective Employee/Employees entitled to this progression.

1) Click on the **Criteria button** to show the Query builder to select specific Employee for this progression.

Define the criteria from the Query builder.

(i)   Select parameter that you want to filter
(ii)   Click this **button** to see the selected parameter list
(iii)   Select record to set
(iv)   Click Insert **button** to place the criteria
(v)   Click **OK button** to filter the record

After defining the criteria from the Query builder, click on the **Check button** to see if the query retrieves the correct Employee records.

*Note: The **Check button** will show the Employee records that are defined with the **Criteria button** and also the **Organisation Unit**, Job Family, Grade, Appointment From and Appointment To. Thus, a "%" denotes all the records.*

2)   Alternatively, click on the **List Employees** to choose individual or several Employees from a listing entitled for this progression. Then click on the **Close button.**

The selected Employee(s) are added automatically under the **Employees Tab**.

To modify employee's information for deployment, click on an Employee's record link under the **Employees Tab**.

When the details are shown, click on the **New Tab** to update.

Enter new information for employee's deployment and then click on the **Save button** to save the changes.

To modify next employee information, click on the Header Browse to view employee list. Then click on a desired employee record to update.

Employee ID	Employee Name	Scheme of Srvc	Appointment Code	Division Status	Cost Centre Code	Org Unit	Appointment Date	Extension Period	Salary Code	Basic Salary	NPC Amt	NPVP Amt	Gross S
BA01N0007	Hong Pao Pao	SALES	SALESEXEC	IV	SALES	CEO-OPER-SALES-DSALES	01/02/2011	0.00	GEN	4,000.00	0.00	0.00	4,0
BA01N0010	Tey Siu Moi	FIN	ACC-II	II	FIN	CEO-ADMIN-FIN	10/10/2011	0.00	GEN	0.00	0.00	0.00	

Click on the **Update button** to update.

Click on the **New Tab** to update. Change necessary information such as salary information.

After the changes have been made, click on the **Save button** to save.

To go back to the previous header screen, click on the **Exit button**.

Change **Circulation Status** to one of the following status to proceed:
'0' (NEW), '1' (SUBMIT), '3' (APPROVED), '4' (REJECT)

If there is no need to route this progression to other personnel's approval to approve this, just set the **Circulation Status** as '3' (APPROVED).

If **Circulation Status** is set as '1' (SUBMIT), then routing officer(s) information needs to be inserted the **Routing Officer Tab** to route to the respective recommender or approver (Email will be send to them respective to seek for their approval).

Click on the **Add New button** in the **Routing Officers Tab**.

The System will show the following screen:

After setting up the Routing list, click **Exit button** to go back to main page.

Click on the **Save button** to save the record.

To view progression history, go to **Employee Profile → Employee Profile** Screen.
Select on the desired employee to retrieve employee information.
Click on the **Progression Tab** to check on the progression history records.

5.7 Creating Annual Increment

This module is used to keep track of employee's annual increment within the organisation.

5.7.1. Definition

No.	Field	Description
1	Progress No	This field display the system generated Run Number of this document.
2	Transaction Date	This field is to capture the date of Created of this document. Its default value is the system date.
3	Action	This field displayed the system generated action code (AI).
4	AI Date From	This field is to capture AI date from. Calendar is provided for the user to select the date.
5	AI Date To	This field is to capture AI date to. Calendar is provided for the user to select the date.

6	**Organisation Unit**	This field is to capture the **Organisation** as search criteria.
7	**Job Family**	This field is to capture the **Job Family** as search criteria.
8	Division Status	This field is to capture the division status as search criteria.
9	Appointment From	This field is to capture the appointment code from range as search criteria.
10	Appointment To	This field is to capture the appointment code to range as search criteria.
11	Increment Percent	This field is to capture the increment percent.
12	Increment Amount	This field is to capture the increment amount.
13	Circulation Status	This field is to capture the **Circulation Status** of the document in the workflow. Help key is provided for user to select from the existing list.

5.7.2. Annual Increment Flow

To begin with, go to **Promotion & Progress > Annual Increment.**

The System will show the following screen:

Click on the **Add button** to add a new record.

Enter the **AI Date From** (Annual Increment) and **To fields** to record when t this progression is going to take effect from.

There are 2 ways to select the respective Employee/Employees entitled to this progression.

The rest steps are the same as Merit Increment. **See Merit Increment 5.8.**

5.8 Change Module

Change Module allows the administrator to make changes to the current progression of any employee. This module is best used to make minor adjustments or correction as the changes are not tracked. Changes that need to be tracked should be made under the **Promotion & Progress**.

5.8.1. Definition

No.	Field	Description

1	Employee ID	This field is to capture the Employee ID. Help key is provided for user to select from the existing list.
2	Action	This field display the system generated action code (NA).
3	Transaction Date	This field is to capture the Created date of the transaction. Its default value is the system date.
4	**Organisation Unit**	This field is to capture the **Organisation Unit** of the Employee. Help key is provided for user to select from the existing list.
5	Division Status	This field is to capture the divisional status of the Employee. Help key is provided for user to select from the existing list.
6	**Job Family**	This field is to capture the **Job Family** code of the Employee. Help key is provided for user to select from the existing list.
7	Appointment Code	This field is to capture the appointment code of the Employee. Help key is provided for user to select from the existing list.
8	Effective Date	This field is to capture the effective date of the Employee. Calendar is provided for the user to select the date.
9	Joined Date	This field is to capture the joined date of the Employee. Calendar is provided for the user to select the date.
10	Confirm Date	This field is to capture the confirmed date of the Employee. Calendar is provided for the user to select the date.
11	Appointment Date	This field is to capture the appointment date of the Employee. Calendar is provided for the user to select the date.
12	Next Conf. Date	This field is to capture the next confirmation date of the Employee. Calendar is provided for the user to select the date.
13	Next Inctl. Date	This field is to capture the next incremental date of the Employee. Calendar is provided for the user to select date.
14	Last day of service	This field is to capture the last day of service the Employee. Calendar is provided for the user to select date.
15	Payroll Mode	This field is to capture the payroll mode of the Employee. Help key is provided for user to select from the existing list.

16	Salary Code	This field is to capture the salary code of the Employee. Help key is provided for user to select from the existing list.
17	Basic Salary	This field is to capture the basic salary of the Employee. Help key is provided for user to select from the existing list.
18	**Cost Centre Code**	This field is to capture cost centre code of Employee. Help key is provided for user to select from the existing list.
19	Basic 1	This field is Basic amount 1.
20	NWC Amount	This field is to capture the NWC amount.
21	Monthly Salary	This field display the Monthly Salary = Basic Salary + NPC Amount.
22	Gross Salary	This field display the Gross Salary = Monthly Salary + NPVP Amount.
23	Reason Code	This field is to capture the reason code of the resignation. Help key is provided for user to select from the existing list.
24	Position Code	This field is to capture the reason code of the resignation. Help key is provided for user to select from the existing list.
25	Essential Category	This field is to capture the essential category of the Employee. Help key is provided for user to select from the existing list.
26	**Job Family**	This field is to capture the hold against **Job Family** of the Employee. Help key is provided for user to select from the existing list.
27	Designation	This field is to capture the designation code of the Employee. Help key is provided for user to select from the existing list.
28	Appointment	This field is to capture the appointment of the Employee.
29	Title	This field is to capture the new designation title of the Employee and is generated by the system according to the selected Designation code.
30	Progress Remark	This field is to capture any progress remark.
31	Basic 2	This field is Basic amount 2.

5.8.2. Change Module Flow

To begin with, go to **Promotion & Progress > Change Module.**

The System will show the following screen:

Change Details

Add Update Delete Search Query Print Move Prev Move Next Save Cancel Exit

Employee ID [   ] [   ]

Action [   ]   Transaction Date [   ]

Current

Organisation Unit	[ ]	Grade	[ ]
Job Family	[ ]	Appointment Code	[ ]
Effective Date	[ ]	Joined Date	[ ]
Confirm Date	[ ]	Appointment Date	[ ]
Next Conf. Date	[ ]	Next Inctl Date	[ ]
Last day of service	[ ]		

Payroll:

Payroll Mode	[ ]	Salary Code	[ ]
Basic Salary	[ ]	Cost Centre Code	[ ]
Basic 1	[ ]	NWC Amount	[ ]
Basic 2	[ ]		
Monthly Salary	0.00	Gross Salary	[ ]
Reason Code	[ ]	Position Code	[ ]
		Essential Category	[ ]

Hold Against: Designation:

Job Family	[ ]	Designation	[ ]
Appointment	[ ]	Title	[ ]

Progress Remark [   ]

Click on the **Query button** to retrieve of employee within organisation.

The list of Employee will be shown in the header browse. Click the desired Employee from the **Header Browse** to modify

Then click on the **Update button** to make changes.

Enter/make changes in information for an employee if needed. After the changes have been made, click on the **Save button** to save the record.

To view progression history, go to **Employee Profile → Employee Profile** Screen.
 Select on the desired employee to retrieve employee information.
Click on the **Progression Tab** to check on the progression history records.

5.9 Importing Employee's Progress Information

5.9.1. Promotion & Progress → Excel Template

This module is to download excel template to import progression information for
employee(s) via import function.

Progression Excel Templates

Right click on the link and choose "Save Target As"

New Appointment Template
Confirmation Template
Merit Inc. Template
Upgrading Template
Promotion Template
Termination Template
Resignation Template
Retirement Template
Rejoin Template
Salary Revision Template
Deployment Template
Emplacement Template

Please Note

- A new Record Terminator column has been added to the template files. This column must contain the value EOR. This is to circumvent Excel Bug which occurs when there are more than 15 records while saving as Excel.
- All date entries must be in one of the following formats
  - **dd MMM yyyy** for e.g. 01 Aug 2005
  - **yyyy/MM/dd** for e.g 2005/08/01
- Remember to save your files in **Excel** format

5.9.1.1. Excel Template Flow

To begin with, go to **Promotion & Progress → Excel Template.**
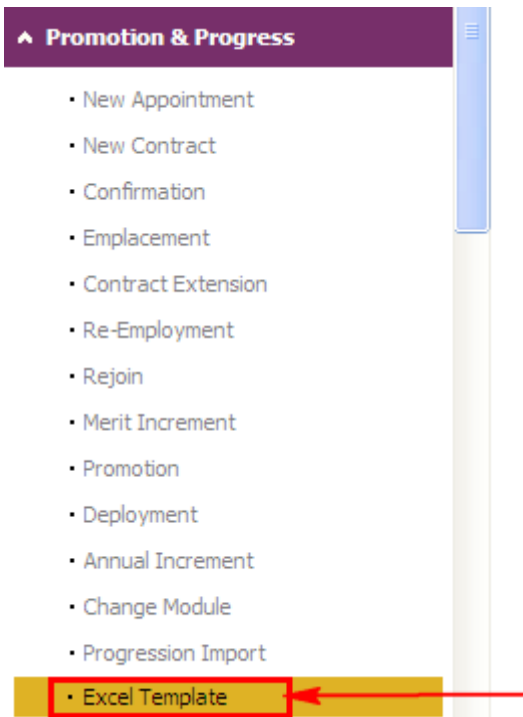
The System will show the following screen:

Progression Excel Templates

Right click on the link and choose "Save Target As"

New Appointment Template
Confirmation Template
Merit Inc. Template
Upgrading Template
Promotion Template
Termination Template
Resignation Template
Retirement Template
Rejoin Template
Salary Revision Template
Deployment Template
Emplacement Template

Please Note

- A new Record Terminator column has been added to the template files. This column must contain the value EOR. This is to circumvent Excel Bug which occurs when there are more than 15 records while saving as Excel.
- All date entries must be in one of the following formats
  - **dd MMM yyyy** for e.g. 01 Aug 2005
  - **yyyy/MM/dd** for e.g 2005/08/01
- Remember to save your files in **Excel** format

Assume that employees' confirmation records are needed to import. Then click on the **Confirmation Template.** The system will prompt the download dialog box.
Click on the **Save button** to save the excel template.
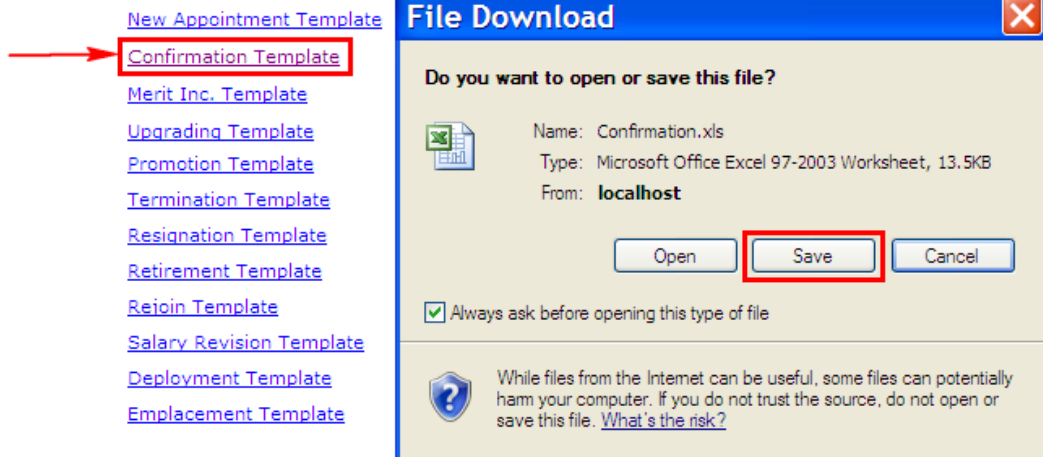
The following save dialog box will appear.
Choose a location to save the template.
Click **Save button** to save the template.
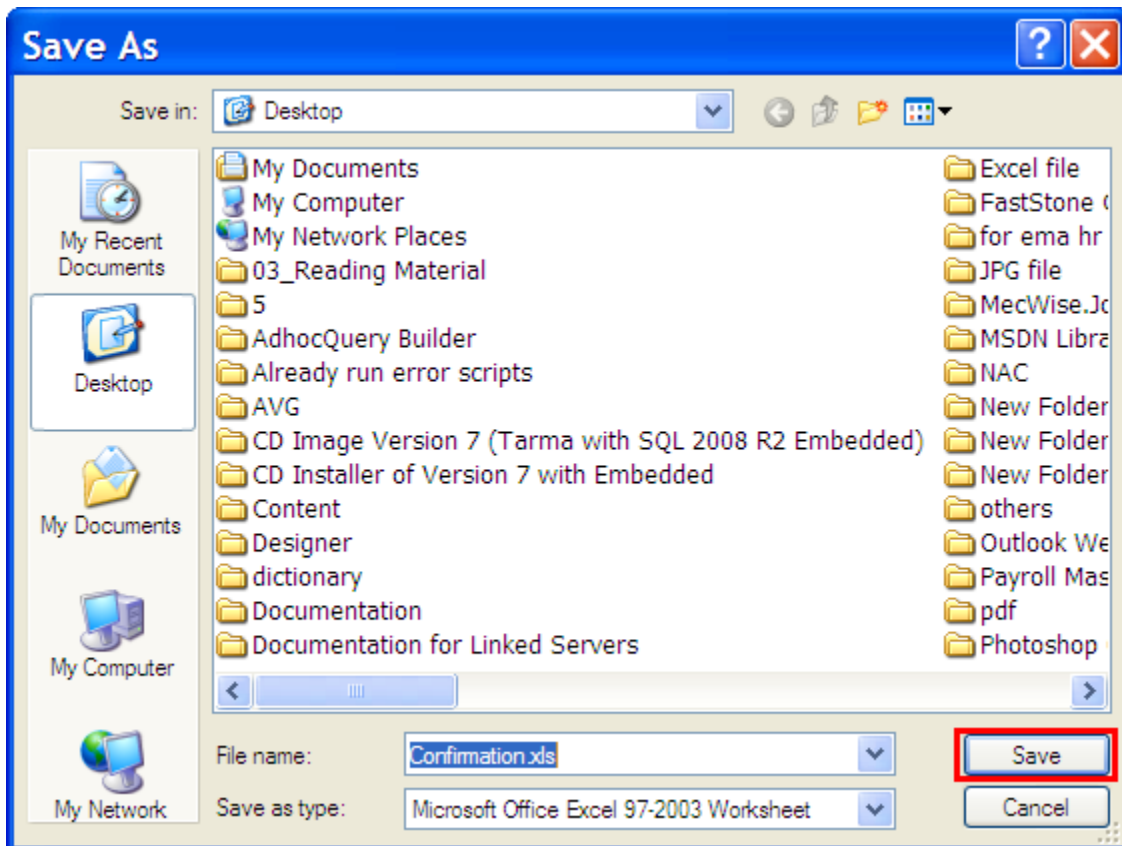
Use this Confirmation excel sheet to fill employee information for confirmation process.

5.10 Promotion & Progress → Progression Import

This module is to upload progression information via import function.

5.10.1. Definition
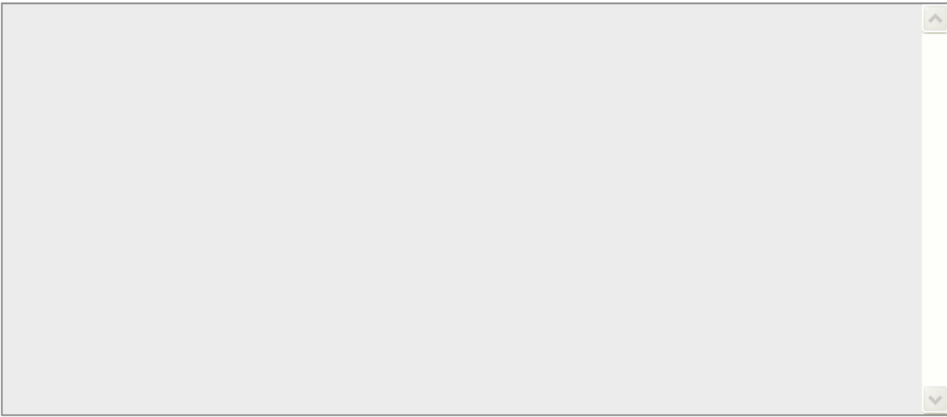
5.10.1.1. Progression Import Flow

To begin with, go to **Promotion & Progress > Progression Import**
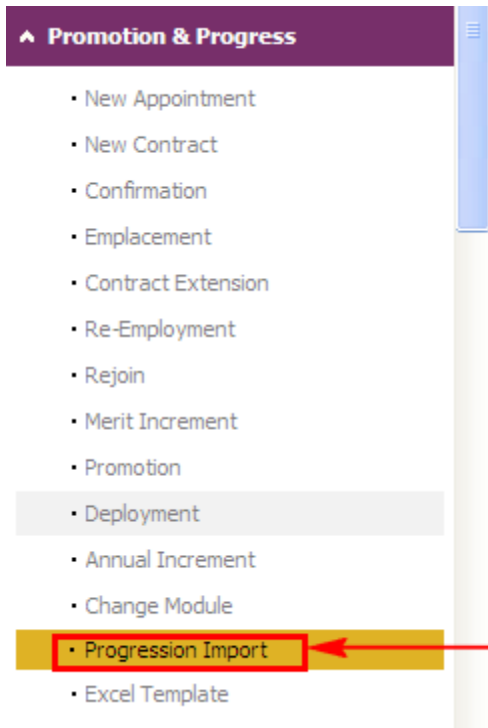
The System will show the following screen:

Click **Action's list box**, and then choose desired progression action.

Assume that the users need to process employee's confirmation. Then choose "**Confirmation**" from the **Action** field.

Then **the Date From and To fields** will become visible. Enter Date information in both fields.

Click on the **Insert Detail pick-list** field to import excel sheet.

The system will prompt the Upload dialog box to upload.

Click **Browse button** and choose the confirmation excel sheet that filled with employee progression. Then click **Open button** to upload.
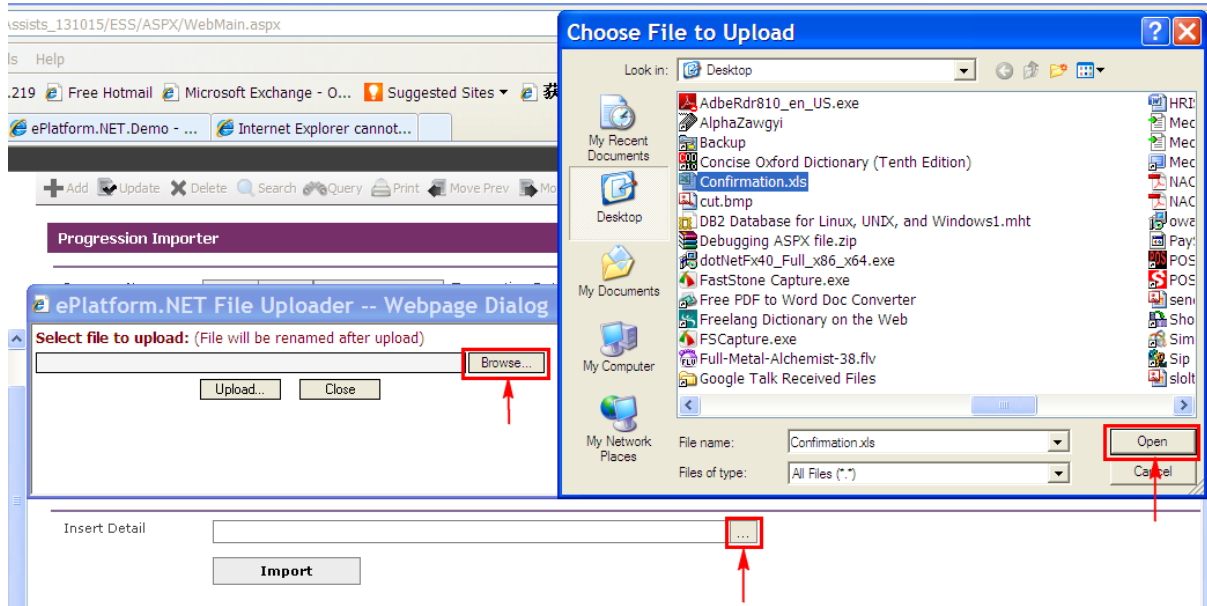
Then click on the **Upload button** to upload excel sheet.
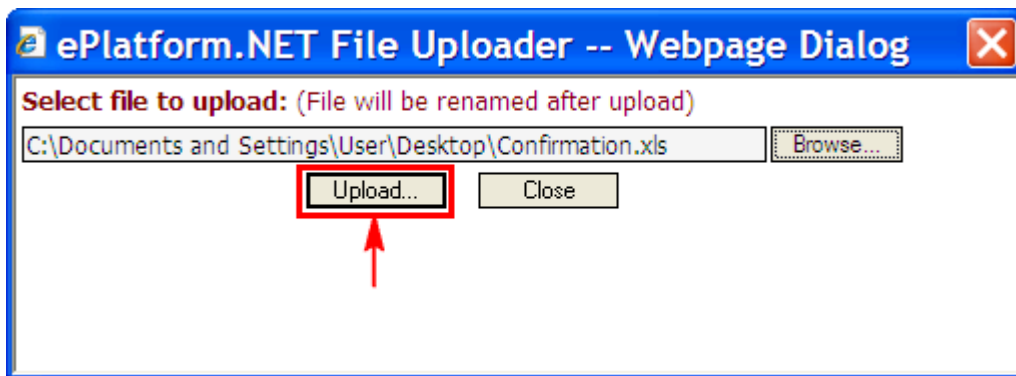
The selected file filled in the Insert Detail field as follow.
Click on the **Import button** to import excel sheet.
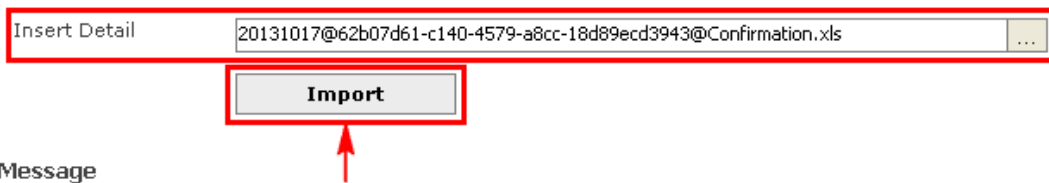
When the record(s) in the excel sheet are successfully uploaded, the system will prompt the following message in the **Message Box**.

Message

1 record(s) have been imported successfully.

6 Leaving Service

This module allows user to set the last day of service for a group of Employee or specific individuals (**For example, Termination / Vacation of Office/ Death / Retirement / Resignation reasons**). **It is important to enter the Last Day of Service and Effective Date as the prorated salary will be based on both of them.**

The Leaving Service consists of the following sub-modules:
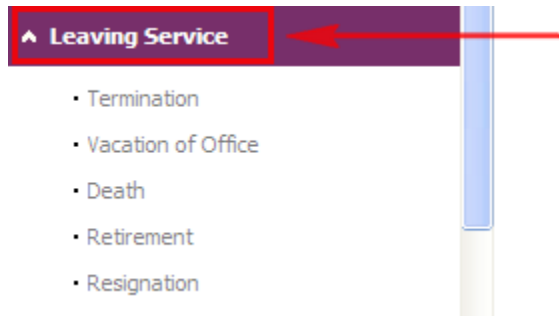
6.1 Termination

This option allows users to terminate the Employee(s) from the Organization.

6.1.1 Definition

No.	Field	Description
1	Progress No	This field display the system generated Run Number of this document.
2	Transaction Date	This field is to capture the date of Created of this document. Its default value is the system date.
3	Action	This field display the system generated action code (TM).
4	Progress Remark	This field is to capture the progress remark.

5	Circulation Status	This field is to capture the **Circulation Status** of the document in the workflow. Help key is provided for user to select from the existing list.

6.1.2 Termination Flow

To begin with, go to **Leaving Service > Termination.**

The system will show the following screen:

Click on the **Add button** to create a new record. Action code is default as 'TM'.

Click on the **List Employees button** to view all active Employees within the Organization. Here, you may wish to terminate a group of Employee and select Employee and click **Close button** to terminate the service.

The selected Employee(s) are added automatically under the **Employees Tab**.

Under the **Employees Tab**, click the Employee record link to set different resignation date for different individual.

The system will display the following details screen.

Select the **New Tab** to update the **Notice Date, Last Day of Service** and **Effective Date**.

Then click on the **Save button** to save the record.

Note: **Effective date** *should be one day after the Employee* **Last day of service**.

Then click on the **Exit button** to return to the previous page.

Change **Circulation Status** to one of the following status to proceed:
'0' (NEW), '1' (SUBMIT), '3' (APPROVED), '4' (REJECT)

If there is no need to route this progression to other personnel's approval to approve this, just set the **Circulation Status** as '3' (APPROVED).

If **Circulation Status** is set as '1' (SUBMIT), then routing officer(s) information needs to be inserted the **Routing Officer Tab** to route to the respective recommender or approver (Email will be send to them respective to seek for their approval).

Click on the **Add New button** in the **Routing Officers Tab**.

The System will show the following screen:

After setting up the Routing list, click **Exit button** to go back to main page.

Click on the **Save button**.

The system will capture the details of the Employee(s) termination. And their salary will be pro-rated according to their last day of service.

6.2 Vacation of Office

This option allows users to set the vacation of officer for employee(s) in the Organization.

6.2.1 Definition

6.2.2 Vacation of Office Flow

To begin with, go to **Leaving Service > Vacation of Office.**

The system will show the following screen:

Click on the **Add button** to create a new record. Action code is default as 'VO'

Here, you may wish to terminate a group of employee under this record and set different resignation date for individual employee. Click on the **List Employees** button to view all active employees in the company.
Next, select the desire employee(s).

The selected Employee(s) are added automatically under the **Employees Tab**.

Under the **Employees** tab, click the employee record link to update. The following screen will be displayed.

Select the **New Tab** to update the **Notice Date, Last Day of Service** and **Effective Date**.

*Note: **Effective date** should be one day after the employee **Last day of service***.

Click on the **Save button** to save the record.

Then click on the **Exit** icon to return to the previous page.

This created record's **circulation status** can be set as '0', '1', '3', '4' depending on the user who create this progression records wants to do with it.

If there is no need to route this progression to other personnel's approval to approve this, just set the **circulation status** to '3'. However, if there is a need for other personnel's approval, set the **status** to '1'.

If circulation status is set to '1', there is a need to entry for the **Routing Officer** tab to add the respective recommender or approver (Email will be send to them respective to seek for their approval).

Click on the **Save button**.

The system will capture the details of the employee(s) termination. And their salary will be pro-rated according to their last day of service.

6.3   Retirement

This option allows users to prepare retirement for Employee(s) in the Organization.

6.3.1   Definition

6.3.2   Retirement Flow

To begin with, go to **Leaving Service > Retirement.**

The system will show the following screen:

Click on the **Add button** to create a new record.

Define the Retirement Date From and To. Click on the List Employees **button** to view all Employees with their retirement dates (fall within the period defined in Section 5.2.3) and the filtering defined at the **Organisation Unit**, Job Family, Grade, Appointment From and Appointment To.

Select Employee and click **Close button** to retire the service.

The selected Employee(s) are added automatically under the **Employees Tab**.

Under the **Employees Tab**, click the Employee record link to set different retirement date for individual Employee.

Then select the **New Tab** to update the **Notice Date, Last Day of Service** and **Effective Date**.

Retirement Details

Employee	BA01N0003	Cindy Lee
New Action	RT	Prev. Action CF
Age (Year)	37 Activity Status Optional	D.O.B. 04/06/1976

Current   **New**

Organisation Unit	CEO-ADMIN-HR		Grade	I
Job Family	HR		Appointment Code	HR-ADMIN
Approval	A		Notice Date	01/10/2013
Effective Date	17/11/2013		Last day of service	01/12/2013

Payroll Mode	M (Monthly)		Salary Code	GEN
Basic Salary	2000.00		Cost Centre Code	ADMIN
Basic 1	0.00		NWC Amount	0.00
Basic 2	0.00			
Monthly Salary	2000.00		Gross Salary	2000.00

Click on the **Save button** and

Add Update Delete Search Query Print Move Prev Move Next **Save** Cancel Exit

Retirement Details

Employee	BA01N0003	Cindy Lee
New Action	RT	Prev. Action CF
Age (Year)	37 Activity Status Optional	D.O.B. 04/06/1976

Click on the **Exit button** to return to the previous page.

Add Update Delete Search Query Print Move Prev Move Next Save Cancel **Exit**

Retirement Details

Employee	BA01N0003	Cindy Lee
New Action	RT	Prev. Action CF
Age (Year)	37 Activity Status Optional	D.O.B. 04/06/1976

Change **Circulation Status** to one of the following status to proceed:
'0' (NEW), '1' (SUBMIT), '3' (APPROVED), '4' (REJECT)

If there is no need to route this progression to other personnel's approval to approve this, just set the **Circulation Status** as '3' (APPROVED).

If **Circulation Status** is set as '1' (SUBMIT), then routing officer(s) information needs to be inserted the **Routing Officer Tab** to route to the respective recommender or approver (Email will be send to them respective to seek for their approval).

Click on the **Add New button** in the **Routing Officers Tab**.

The System will show the following screen:

After setting up the Routing list, click **Exit button** to go back to main page.

Click on the **Save button** to capture the details for the Employee(s) retirement. And their salary will be pro-rated according to their last day of service.

6.4   Death

This option provides for Leaving Service due to Death of employee(s) from the Company.

6.4.1   Definition

6.4.2   Death Flow

To begin with, Go to **Leaving Service > Death.**

Click on the **Add button** to create a new record.

Here, you may wish to terminate a group of employee under this record and set different resignation date for individual employee. Click on the **List Employees** button to view all active employees in the company.

Next, select the desire employee(s).

Under the **Employees** tab, click the employee record link to modify.

The following detail screen will be shown. Click on the **New Tab** to update.
Enter the **Last Day of Service** and **Effective Date** field.

Note: **Effective date** should be one day after the employee **Last day of service**.

Click on the **Save** icon and click on the **Back** icon to return to the previous page.

Change **Circulation Status** to one of the following status to proceed:
'0' (NEW), '1' (SUBMIT), '3' (APPROVED), '4' (REJECT)

If there is no need to route this progression to other personnel's approval to approve this, just set the **Circulation Status** as '3' (APPROVED).

If **Circulation Status** is set as '1' (SUBMIT), then routing officer(s) information needs to be inserted the **Routing Officer Tab** to route to the respective recommender or approver (Email will be send to them respective to seek for their approval).

Click on the **Add New button** in the **Routing Officers Tab**.

The System will show the following screen:

After setting up the Routing list, click **Exit button** to go back to main page.

Click on the **Save button** to capture the details for the Employee(s) termination. And their salary will be pro-rated according to their last day of service.

6.5   Resignation

This option allows you to resign the Employee(s) from the Organization.

6.5.1   Definition

6.5.2   Resignation Flow

To begin with, go to **Leaving Service > Resignation.**

The system will show the following screen:

Click on the **Add button** to create a new record.

Click on the List Employees **button** to view all Employees with their retirement dates (fall within the period defined in Section 5.2.3) and the filtering defined at the **Organisation Unit**, Job Family, Grade, Appointment From and Appointment To.

Select Employee and click **Close button** to retire the service.

The selected Employee(s) are added automatically under the **Employees Tab**.

Under the **Employees Tab**, click the Employee record link to set different retirement date for individual Employee.

Then select the **New Tab** to update the **Notice Date, Last Day of Service** and **Effective Date**.

Resignation Details

Employee	BA01N0010	Tey Siu Moi	
New Action	VO	Prev. Action	CF

Current / **New**

Organisation Unit	CEO-ADMIN-FIN	Grade	II
Job Family	FIN	Appointment Code	ACC-II
Approval	A	Absent Date	01/10/2013
Period	0.00	Last day of service	01/11/2013
		Effective Date	23/11/2013

Payroll Mode	M (Monthly)	Salary Code	GEN
Basic Salary	0.00	Cost Centre Code	FIN
Basic 1	0.00	NWC Amount	0.00
Basic 2	0.00		
Monthly Salary	0.00	Gross Salary	0.00

Click on the **Save button.**

Add Update Delete Search Query Print Move Prev Mo——→ Save Cancel Exit

Resignation Details

Employee	BA01N0010	Tey Siu Moi	
New Action	VO	Prev. Action	CF

Click on the **Exit button** to return to the previous page.

Add Update Delete Search Query Print Move Prev Move Next Save Cancel Exit

Resignation Details

Employee	BA01N0010	Tey Siu Moi	
New Action	VO	Prev. Action	CF

Change **Circulation Status** to one of the following status to proceed:
'0' (NEW), '1' (SUBMIT), '3' (APPROVED), '4' (REJECT)

If there is no need to route this progression to other personnel's approval to approve this, just set the **Circulation Status** as '3' (APPROVED).

If **Circulation Status** is set as '1' (SUBMIT), then routing officer(s) information needs to be inserted the **Routing Officer Tab** to route to the respective recommender or approver (Email will be send to them respective to seek for their approval).

Click on the **Add New button** in the **Routing Officers Tab**.

The System will show the following screen:

Set/Edit Routing List

Application ID : SDA_RS

Role ID : RA (Approval)

Recipient ID : BA01N0006

Recipient Name : Amy Chan

Recipient Email : BA01N0006@starvisionit.comx

After setting up the Routing list, click **Exit button** to go back to main page.

Click on the **Save button**. The system will capture the details of the employee(s) resignation. And their salary will be pro-rated according to their last day of service.

7   Ad-hoc Query / Reports

This section explains how to do Ad-hoc Query and print Reports.

7.1   Ad-hoc Query

This module allows user to view information using ad-hoc queries. There are sub-modules as follows:

- Employee Queries
- Personnel Record Queries
- Audit Queries

To begin with, go to **Adhoc Query.** The sub-modules will be shown.

Click on any sub-module e.g. Employee Queries and the list of queries in the sub-module will be shown.
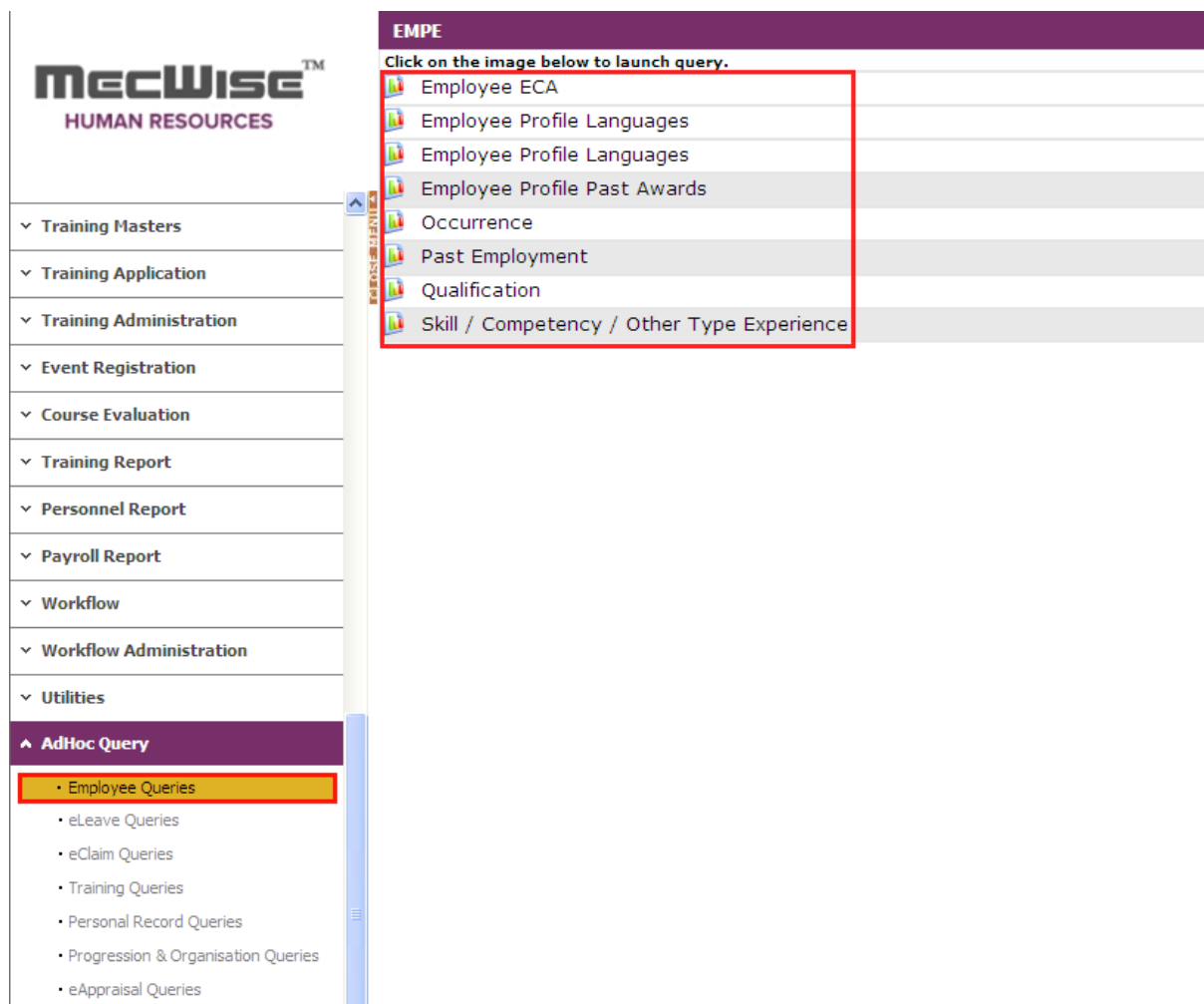
Click on any Query in the list e.g. Past Employment and the Ad-hoc query for List of Training Application will be shown

Enter or Select the Employee ID From pick list to Set Parameters.
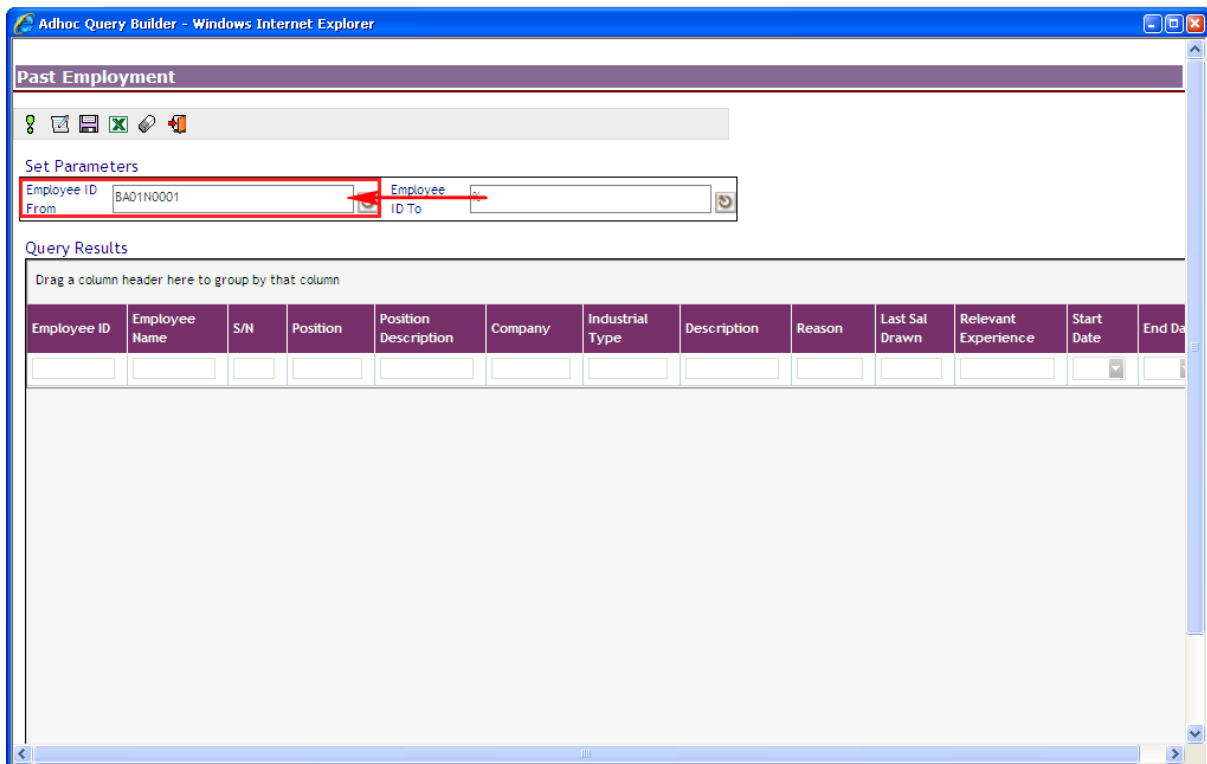
After entering the Set Parameters, process the Query by clicking the 'Execute' **icon** (circled above). Data from the Query will be displayed as above.
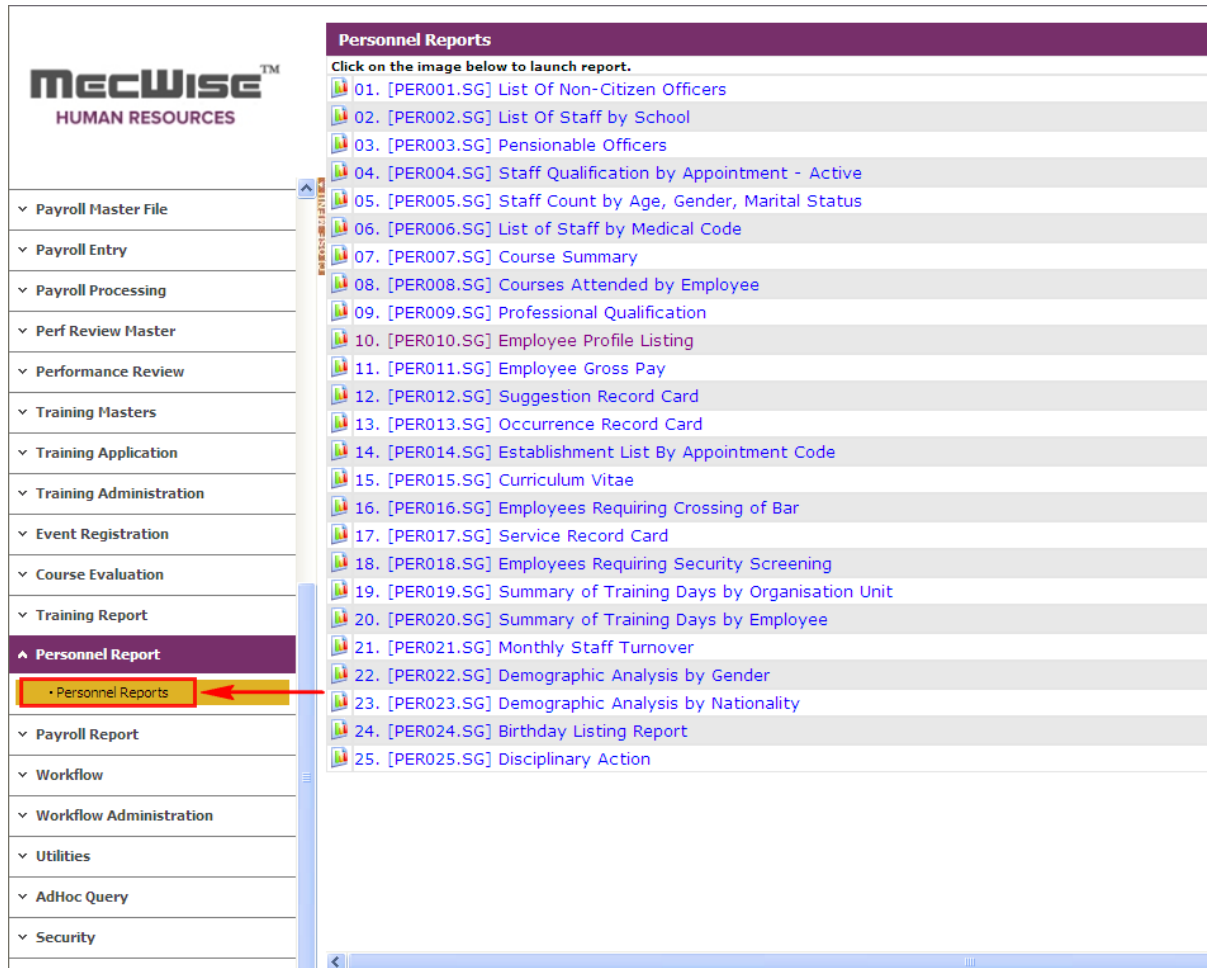
7.2 Reports

This section explains how to print reports.

To begin with, go to any Report sub-module e.g. Personnel Reports.

Click on the Report sub-module e.g. Personnel Reports and the list of reports in the sub-module will be shown.

Click on the process **button** (circled above) of any Report in the list e.g. Employee Profile Listing and the Employee Profile Listing will be shown
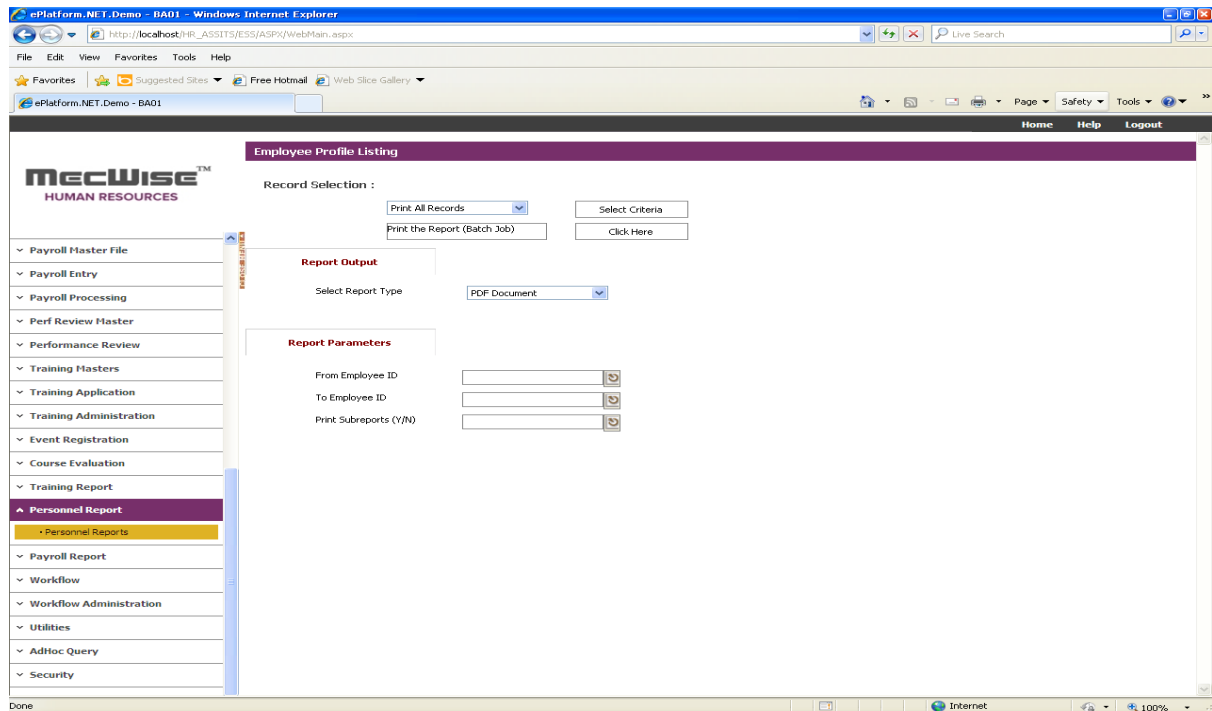
Click the 'Select Criteria' and the Query Builder screen will be displayed for you to enter or select the parameters for printing the report. After entering or selecting the parameters, click 'OK'.
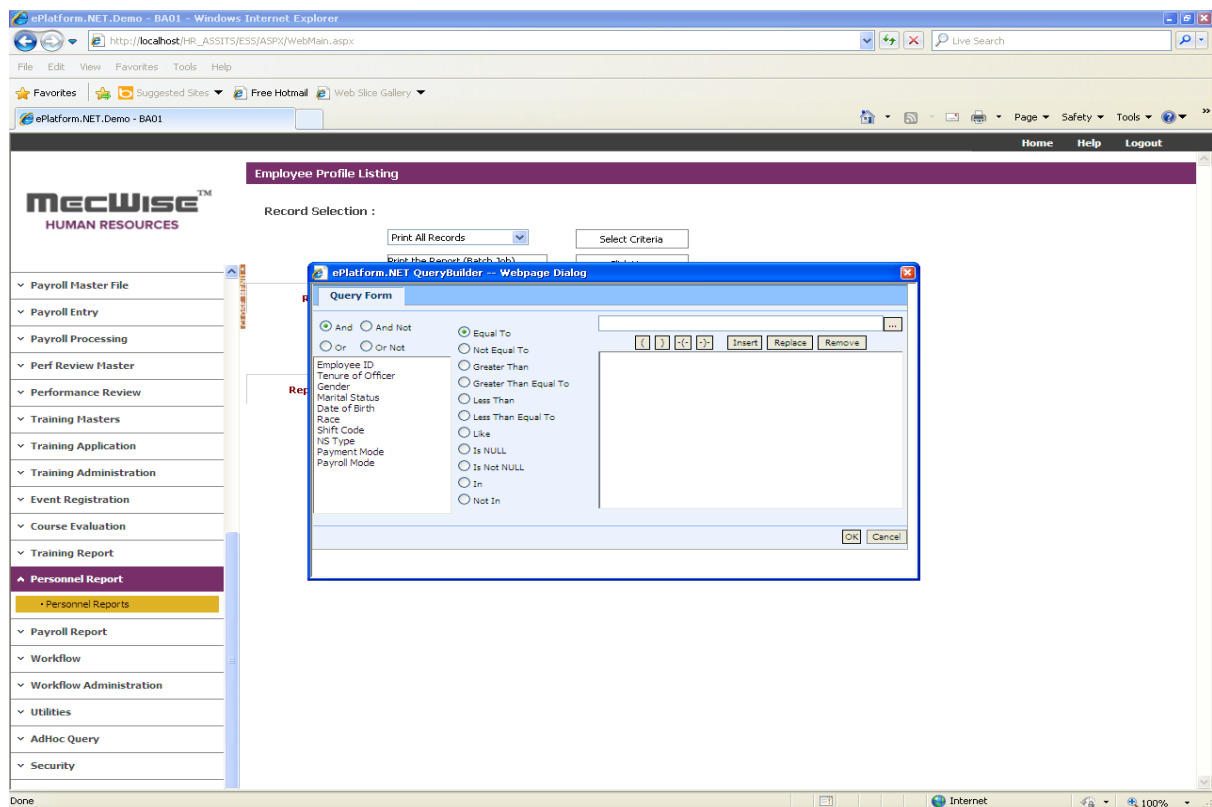
Enter or select the 'Report Parameters' and enter the parameters for printing the report. After entering or selecting the parameters, click the 'Click Here' **button**. The report will be printed.