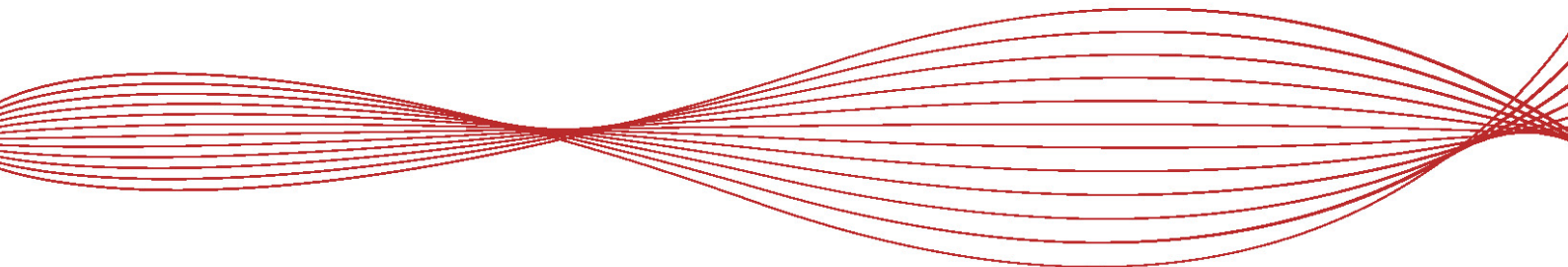




# Human Resources

## Software User Guide

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## **1 Introduction**

CS Human Resources enables the recording of key personnel information including the following for employees and contractors:

- Administrative details
- Employment category / classification
- Organisation details
- Employment periods (start / end dates and details)
- Performance reviews
- Correspondence

This guide provides details of how to enter and manage this information, as well as other information required to administer and manage the software.

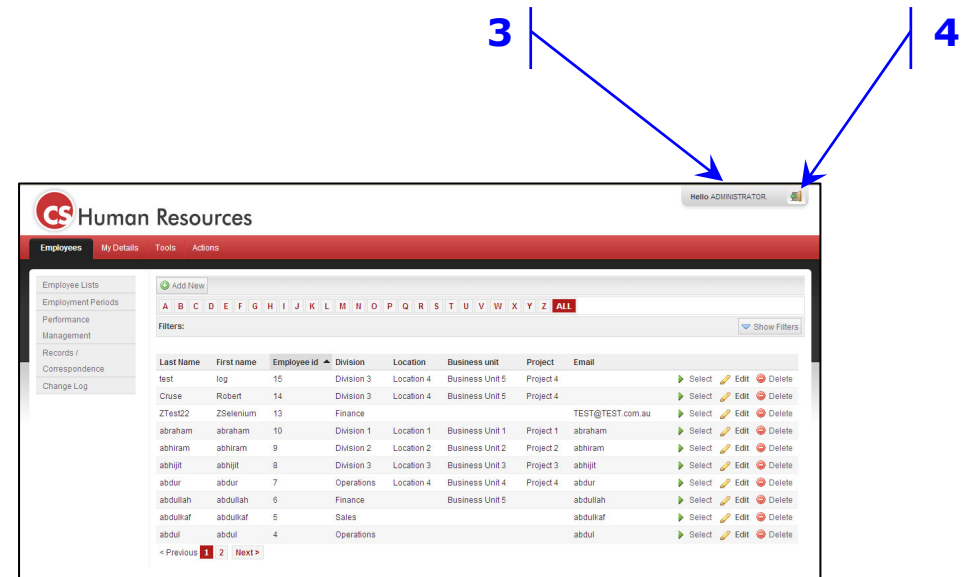
### **IMPORTANT NOTE:**

Depending upon individual permissions each user may not have access to all aspects of the software described in this Guide. This Guide provides information relating to all available aspects of the system. The ability to do some tasks on some pages will also be restricted based on permissions, such as the deletion of records.

## 2 Logging In

**TO LOG IN, FOLLOW THESE STEPS:**

- 1 – Navigate to the login screen for the CS Human Resources for your organisation.
- 2 – Enter your Username and Password and click Login.
- 3 – Once logged in, your name will appear at the top right.
- 4 – To log out, click the exit icon in the top right.



### 3 Navigation, Searching and Filtering.

EACH PAGE HAS A SIMILAR LAYOUT TO THAT BELOW.

- [1] Navigate between areas within CS Human Resources using the **Tab's** on the red bar.
- [2] Within each Tab, use the **Menu** to access specific records and information.
- [3] Browse by Last Name using the A-Z browser.
- [4] Click the Show / Hide Filters button to access the Search and Filters.
- [5] To SEARCH – enter your search text and click Filter.
- [6] Click Clear Filters to reset the filter.
- [7] Click any column heading to SORT by that column. Click again to reverse the sort order.

The screenshot shows the 'List Employee' page in the CS Human Resources system. The interface includes a top navigation bar with tabs for 'Employees', 'My Details', 'Tools', and 'Actions'. A left-hand menu contains 'Employee List', 'Reports', and 'Change Log'. The main content area features a search and filter section with an A-Z browser, a search input field, and several dropdown menus for 'Division', 'Location', 'Business Unit', 'Project', and 'Position'. Below the filters are buttons for 'Filter', 'Filter and Save', and 'Clear Filters'. At the bottom, a table displays employee records with columns for 'Employee ID', 'Last name', 'First Name', 'Division', 'Location', 'Business Unit', 'Project', and 'Email'. Each row includes 'Edit', 'Delete', and 'Actions' icons. Numbered callouts (1-7) point to the following elements: 1. The top navigation bar; 2. The left-hand menu; 3. The A-Z browser; 4. The 'Hide Filters' button; 5. The search input field; 6. The 'Clear Filters' button; 7. The 'Employee ID' column heading in the table.

Employee ID	Last name	First Name	Division	Location	Business Unit	Project	Email	Actions
1	ADMINISTRATOR	ADMINISTRATOR						Edit Delete Actions
2	Solo	Han		udo			hansolo@test.com	Edit Delete Actions
3	Grant-smith	Peter		udo			lukeskywalker@test.com	Edit Delete Actions

## 4 Viewing and Editing Employees

The Employee List page is the starting point for entering and managing employees. From here new employees are added [1] and existing employees edited [2] and Deleted.

To view and manage the details of an employee, click the Edit button. The Menu is then expanded as shown in [3] to display sub-menus for Details, Employment Periods, Performance Management and Correspondence. The Sub-Menus can also be accessed from the Actions button [4].

The screenshot shows the 'List Employee' page in the CS Human Resources system. The page includes a navigation bar with 'Employees', 'My Details', 'Tools', and 'Actions' tabs. A sidebar on the left contains 'Employee List', 'Reports', and 'Change Log'. The main content area features a 'List Employee' title, 'Add New' and 'Excel Export' buttons, and an alphabetical filter bar. Below this is a table of employees with columns for Employee ID, Last name, First Name, Division, Location, Business Unit, Project, and Email. Each row has 'Edit' and 'Delete' buttons, and an 'Actions' dropdown menu. Annotations are as follows: '1' points to the 'Add New' button; '2' points to the 'Edit' button for the first employee; '3' points to the expanded 'Actions' dropdown menu for the first employee, showing sub-menus for 'Details', 'Employment Periods', 'Perf. Management', and 'Correspondence'; '4' points to the 'Actions' dropdown menu for the fifth employee.

Employee ID	Last name	First Name	Division	Location	Business Unit	Project	Email	Actions
1	ADMINISTRATOR	ADMINISTRATOR						Edit Delete
2	Solo	Han		udo			hansolo@test.com	Edit Delete
3	Grant-smith	Peter		udo			lukeskywalker@test.com	Edit Delete
4	Organa	Leia		udo			leiaorgana@test.com	Edit Delete
5	Vader	Darth		udo			darthvader@test.com	Edit Delete

## 5 Employee Details

The **Employee Details** screen is divided into 7 main Sections as below. The options in each drop down list can be controlled via the Tools Tab.

### Details

Basic administrative information.

### Contact

Personal contact information for the employee.

### Organisation

Details of the employee's position in the organisation structure.

### Position

Job details including any allowances.

### Next of kin

Contact details for next of kin.

### Employment

Current employment status and other details.

### Address

Employee's address.

Enter Employee Details			
<b>Details:</b>	First Name: <input type="text"/>	Middle Name: <input type="text"/>	<input type="button" value="View / Edit Photo"/>
	Last Name: <input type="text"/>	Allergies Conditions Notes: <input type="text"/>	
	Date of Birth: <input type="text"/>	Terminated: <input type="checkbox"/> Do not rehire: <input type="checkbox"/>	
	Indigenous: <input type="checkbox"/> Yes		
	Gender: <input type="text" value="Choose"/>		
<b>Contact:</b>	Home phone: <input type="text"/>	Mobile phone: <input type="text"/>	
	Email Address: <input type="text"/>		
<b>Organisation:</b>	Division: <input type="text" value="Finance"/>	Business Unit: <input type="text" value="Head Office"/>	
	Location: <input type="text" value="aarti"/>	Project: <input type="text" value="Airport Redevelopment"/>	
<b>Position:</b>	Line Manager: <input type="text" value="aarti"/>	Job Title: <input type="text" value="Financial Controller"/>	
	Category: <input type="text" value="Site Maintenance"/>	Due on: <input type="text"/>	
	Vehicle Type: <input type="text" value="Bus"/>	Expires: <input type="text"/>	
	Bonus Type: <input type="text" value="Christmas"/>		
	Allowance: <input type="text" value="Training"/> <input type="radio"/> % <input type="radio"/> \$		
<b>Next of Kin:</b>	First Name: <input type="text"/>	Last Name: <input type="text"/>	
	Relationship: <input type="text"/>	Contact #2: <input type="text"/>	
	Contact #1: <input type="text"/>		
<b>Employment:</b>	Status: <input type="text" value="Internship"/>	Type: <input type="text" value="Casual"/>	
	Agreement: <input type="text" value="erich"/>	Amount: <input type="text"/> <input type="radio"/> % <input type="radio"/> \$	
	Rate Type: <input type="text" value="jill"/>	Due on: <input type="text"/>	
<b>Address:</b>	Address 1: <input type="text"/>	Postcode: <input type="text"/>	
	Address 2: <input type="text"/>	Country: <input type="text" value="Fetching list options..."/>	
	Suburb: <input type="text"/>		
	State: <input type="text" value="Fetching list options..."/>		

## 6 Employment Periods

Employment Periods enable start and end dates for each employee to be tracked. Multiple periods can be entered for each Employee, such as when they enter a new contract or there is a significant change in employment status (such as moving from Contract to Full Time).

\* Only the Employment Periods for the selected employee are shown in the list.

### TO ADD OR EDIT AN EMPLOYMENT PERIOD

- [1] Navigate to the Employment Periods page. Search or filter for the desired employee.
- [2] Click Edit to modify an existing Employment Period.
- [3] Click Delete to delete an existing record.
- [4] Click Add New to create an Employment Period.
- [5] Within each Employment Period enter key dates employment type.
- [6] Enter termination information where applicable.
- [7] Click Save when finished.

The screenshot shows a table of employment periods for an employee named Bill Smith. The table has columns for Last name, First name, Start Date, End Date, Employment type, Probation end date, and Contract end date. Each row includes Edit and Delete icons. A 'Show Filters' button is in the top right. A '1' callout points to the '< Previous' link, a '2' callout points to the 'Unset' link, and a '3' callout points to the 'Delete' icon of the first row. A '4' callout points to the 'Add New' button at the top left.

Last name	First name	Start Date	End Date	Employment type	Probation end date	Contract end date	
Smith	Bill	05/05/2009	18/05/2009	Emp Type 6			Edit Delete
Smith	Bill	16/05/2008	04/05/2009	Emp Type 1			Edit Delete
Smith	Bill	07/05/1992	15/05/2008	Emp Type 1			Edit Delete

The screenshot shows the 'Update information for Employment Period' form. It contains fields for Employee (dropdown), Start Date, End Date, EmploymentType (dropdown), Probationary Period End Date, Contract End Date, Termination Interview (checkbox), Termination Reason (dropdown), and Exit Interviewer (dropdown). A 'Save' button is at the bottom. A '5' callout points to the Employee dropdown, a '6' callout points to the Termination Reason dropdown, and a '7' callout points to the Save button.

## 7 Performance Management

The Performance Management page enables performance and other reviews to be recorded and managed. Each review has a type, due date and date completed.

Attachments can be uploaded to each record, such as a scan of hard copy notes or an electronic record.

\* Only the Employment Periods for the selected employee are shown in the list.

### TO ADD OR EDIT AN PERFORMANCE REVIEW

[1] Navigate to the Performance Management page.

[2] Click Edit to modify or complete an existing Performance Review.

[3] Click Delete to delete an existing record.

[4] Click Add New to create an new Performance Review.

[5] For each Performance Review enter the review details including status.

[6] Upload attachments if required.

[7] Click Save when finished.

The screenshot shows a table of performance reviews for 'Smith, Bill'. The table has columns for Last name, First name, Type, Due date, Status, and Date completed. There are two rows of data. The first row is for 'Emp Review 5' with a due date of 07/05/2009 and status 'Open'. The second row is for 'Emp Review 3' with a due date of 13/05/2009 and status 'Closed'. Each row has 'Edit' and 'Delete' icons. Above the table is an 'Add New' button and a 'Filters' section. Annotations: 1 points to the 'Next' button in the pagination; 2 points to the 'Unset' button; 3 points to the 'Delete' icon; 4 points to the 'Add New' button.

Last name	First name	Type	Due date	Status	Date completed	
Smith	Bill	Emp Review 5	07/05/2009	Open		Edit Delete
Smith	Bill	Emp Review 3	13/05/2009	Closed	21/05/2009	Edit Delete

The screenshot shows the 'Update information for Employment Review' form. It includes fields for Employee (Smith, Bill), Review Type ([SELECT]), Due Date, Status (Open), and Completed Date. Below these is an 'Upload a file' section with an 'Add Document' button and an 'Upload' button. A large text area is provided for notes. At the bottom is a 'Save' button. Annotations: 5 points to the form fields; 6 points to the 'Upload a file' section; 7 points to the 'Save' button.

## 8 Correspondence

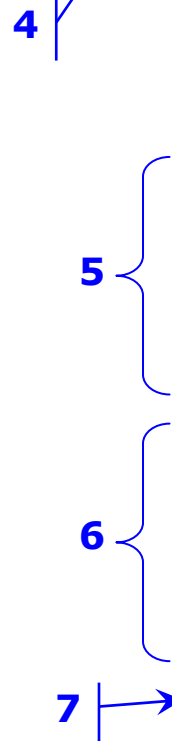
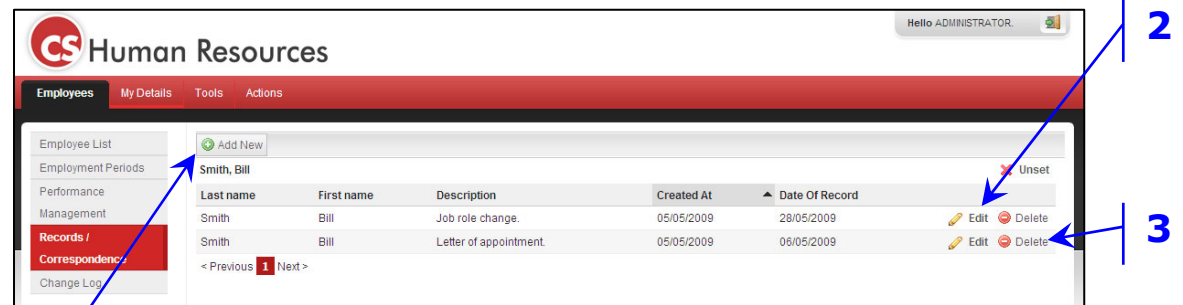
Any electronic file can be uploaded and recorded against the employee using the Correspondence page.

For each record a comment can be entered, the date of the correspondence recorded and scans or electronic copies attached.

\* Only Correspondence for the selected employee is shown in the list.

### TO ADD OR EDIT A CORRESPONDENCE

- [1] Navigate to the Correspondence page.
- [2] Click Edit to modify an existing record.
- [3] Click Delete to delete an existing record.
- [4] Click Add New to enter a new record.
- [5] For each record enter a description and date.
- [6] Upload scans of the correspondence or an electronic copy.
- [7] Click Save when finished.



### Update information for Record.

Employee: [SELECT] ▼

Description:

Date Entered: 05/05/2009

Date Of Record:

**Upload a file**

Add Document  Upload

Save

## 8 My Details

A My Details page is accessible by each employee, displaying selected information.

Some information can be updated by the employee such as address, contact and next of kin details.

## 9 Tools

The Tools page is provided to enable Administrators to edit and manage the various drop-down lists used within the system.

The values entered against each list within the Tools page will appear in the corresponding drop-down list within the Employees tab.

## 10 Actions

The Actions page provides administrators with a list of tasks that have been generated by CS Human Resources, including the status of the task.

Tasks are generated in response to alerts such as an approaching Performance Review date. Tasks also generate an email.

The screenshot displays the 'My Details' page for an employee with ID 1. The page is organized into several sections:

- Employee ID:** 1
- Linked Attachment:** A profile picture placeholder with a 'Set' button.
- Personal Information:** Fields for First Name (ADMINISTRATOR), Middle Name, Last Name (ADMINISTRATOR), Birth Date, Position, Employment Status, and Line Manager.
- Address:** Fields for Address Line 1, Address Line 2, Suburb, Postcode, Country (dropdown), and State (dropdown).
- Contact:** Fields for Phone, Mobile, and Email.
- Next of Kin:** Fields for First Name, Last Name, Relationship (dropdown), Contact 1, and Contact 2.