

Biographical How-To

How to Add a Required Qualification to an Employee

Outcome: Demonstrate how to add a license, which will expire, to an employee

Use When



By defining “Specs” for an employee you will receive reminders when licences expire and warnings if employees don’t meet required “Specs” at sites they’re allocated to.

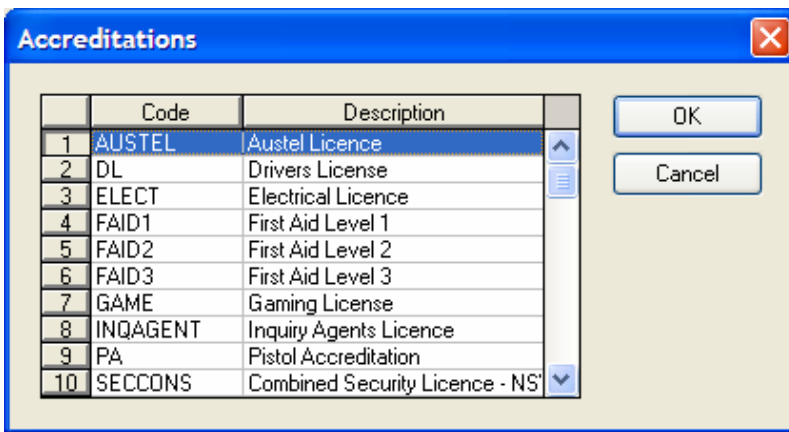
Procedure


1. Open “Biographical / Personnel Maintenance / Maintain Personnel Details” from the navigator

The screenshot shows the 'Personal Details' window for employee JOHN LITHGOW. The 'Specs' tab is selected and circled. The table below shows a license entry for 'SECL' (Standard Security License) with number 259874 and expiry date 23/06/2008.

Licence type	Description	Number	Expiry
SECL	Standard Security License	259874	23/06/2008

2. Select the employee
3. Click  the “Specs” tab
4. Double click  a blank cell under the heading “License Type”



5. Select a code from the list
6. Tab to “Number” and enter the licence or certificate number
7. Tab to “Expiry” and enter the expiry date
8. Click 

How to Change an Employee’s Address


Outcome: *Demonstrate how to change an employee’s address*


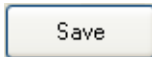
Use When

When an employee changes their home address use this procedure to update their details.

Procedure

1. Open “Biographical / Personnel Maintenance / Maintain Personnel Details” in the “Navigator”
 2. Click the “Address” tab
 3. Select the employee using “Employee No:”
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4. Change individual address details
 - A. Highlight the existing data 
 - 1) See “Address” field above
 - B. Type in new information
 - C. State maybe changed by using the list box

5. Click  

Global Allowance / Deduction Update

Outcome: *Demonstrate how to create an allowance for a group of employees. Explain how to prevent an allowance from being applied to a system-selected employee.*

Use When

Use this procedures to add an allowances or deductions for a group of employees instead of one by one.

Overview

Enter Parameters

Check Selection

Procedure

Enter Parameters

1. Open “Payroll / Tools / Update Employees/Allowance” from the “System Codes” menu

2. Enter “Selection” criteria
 - A. Employees will be selected based on this criterion
 - B. Select a value for
 - 1) “Pay Class”
or
 - 2) “Employee Type”
or
 - 3) Both
 - C. Select “AND” or “OR”

AND – must have the same “Pay Class” **and** “Employee Type”



OR – must have either the same “Pay Class” **or** the same “Employee Type”

3. Select an “Allowance Code” to be added to the employees
4. Select the “Method”

“Amount” – a fixed amount every pay

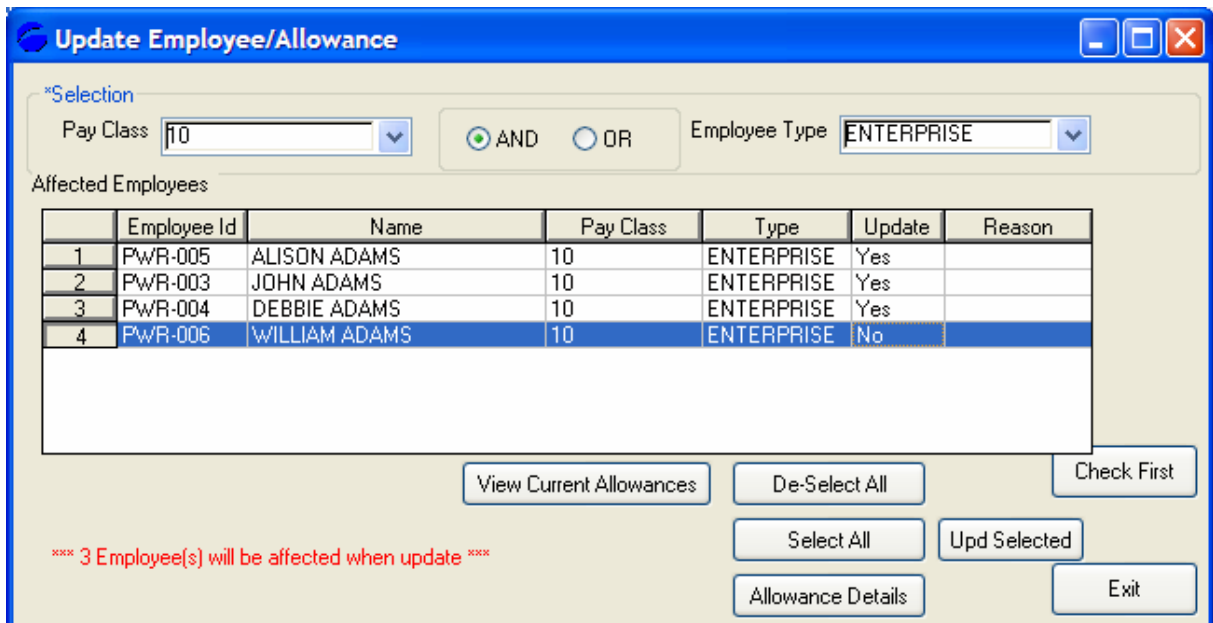
“Reducing” – an amount reducing from a total every pay

5. Enter in the amount
6. Set the “Effective Date”
7. Set the “Valid To” date (if required)
8. Add a “Notation” if desired

9. Check “Print On Advice” if you want the allowance to print on the employees “Pay Advice”
10. Select a “Cost Centre” if using the General Ledger module
11. Choose either the  button or  button
 - A. Check First
 - 1) This button allows you to review the selected employees
 - 2) See the following section for more details
 - B. Update
 - 1) This button will update the employee records without reviewing the selection

Check Selection

1. If you choose “Check First” then the second screen will be displayed
 - A. It shows all selected employees according to your selection criteria



Update Employee/Allowance




*Selection
 Pay Class: AND OR Employee Type:

Affected Employees



	Employee Id	Name	Pay Class	Type	Update	Reason
1	PWR-005	ALISON ADAMS	10	ENTERPRISE	Yes	
2	PWR-003	JOHN ADAMS	10	ENTERPRISE	Yes	
3	PWR-004	DEBBIE ADAMS	10	ENTERPRISE	Yes	
4	PWR-006	WILLIAM ADAMS	10	ENTERPRISE	No	

View Current Allowances De-Select All Check First
 Select All Upd Selected
 Allowance Details Exit

*** 3 Employee(s) will be affected when update ***


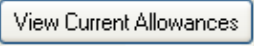



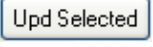
2. On this screen you can:
 - A. Double click  in the “Update” column, for a specific employee, to toggle the update flag between “Yes” and “No”
 - B. Click   to set all records to “No”
 - 1) Flag specific employees as desired

	Employee Id	Name	Pay Class	Type	Update
1	PWR-005	ALISON ADAMS	10	ENTERPRISE	No
2	PWR-003	JOHN ADAMS	10	ENTERPRISE	No
3	PWR-004	DEBBIE ADAMS	10	ENTERPRISE	No
4	PWR-006	WILLIAM ADAMS	10	ENTERPRISE	No

- C. Click   to set all records to “Yes”
 - 1) Set specific employees to “No” as desired

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	Employee Id	Name	Pay Class	Type	Update
1	PWR-005	ALISON ADAMS	10	ENTERPRISE	Yes
2	PWR-003	JOHN ADAMS	10	ENTERPRISE	Yes
3	PWR-004	DEBBIE ADAMS	10	ENTERPRISE	Yes
4	PWR-006	WILLIAM ADAMS	10	ENTERPRISE	Yes

- D. Select an employee and click  
- 1) This will open the “Employee Standard Deductions and Allowance” window
 - 2) Review current allowances/deductions before the update.
- E. Click  the  button to return the first screen
- F. The number of employees that will be affected by the update is displayed at the bottom of the screen
- **** 4 Employee(s) will be affected when update ******
- G. Click  the  button to update the employees with “Update” set to “Yes”.
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