Reference Guide

Human Capital Management v10x

By CMiC



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Human Capital Management

Overview of Human Capital Management

The HR system is non-company specific, and works on a system level. Organizational Chart security is applicable restricting employee information based on the Org Chart if the "HCM: Allow employee access by employee security" privilege is unchecked for the user in System Data. If the flag is checked, Payroll security combined with Org Chart security is applicable when accessing employee related data. Employee security is also applicable to individual modules allowing users access to individual modules based on employee security or org chart security. The modules affected are: Applicant Management, Training, Performance Management, Compensation Management and Hiring Requisitions.

Overall Usage

Any field that is a large text field can be double clicked to open a Text editing box.

Position Control

Job Classifications

There are many different ways that term Job Classification may be used, for our purposes a job classification is a type of position within the organization. For example, Project Accountant, Estimator, Clerk, etc. Each of these Job Classifications has at least one position within the organization.

Each Job Classifications has a generic job title and a job summary and a job responsibilities section. The Job Classifications define the 'Salary Grade' and if the position is exempt for the Federal Labor Standards Act.

The job summary, responsibilities, salary grade and the FLSA exempt status are defaulted to each position created for the classification where they can be adjusted to fit the exact position.

Each Job Classification may have a set of attributes related to it. This set of attributes allows for the definition of required education degrees, skills, training, memberships and licenses/certifications. For more information on defining these attributes refer to File Maintenance. Attributes can be associated to the Job Classification as required or just would be nice.

Attributes entered against a Job Classification are used during the hiring process to order/rate the applications according to requirements.

When a Job Classification is created it creates a record in the HR Positions table. When defining a Job Classification it is important to understand the ID code represents the position code within the HR application.

The Job Classifications page starts as a log of all defined classifications. To edit an existing classification click on the link on the log or to add a new classification use the **[Create Job Classification]** button.



Once the job classification has been created by using the [Save] button attributes can be added.

To add or review attributes on a job classification open the 'Desired Attributes' tab. This tab displays a list of the attributes already assigned to the position. Attributes are broken down into 5 components:

• Skills, Training, Licensees and Certifications, Degrees and Memberships.

One or all of these components can have multiple attributes, some may be required others just nice to have.

🚰 Human Capital Management - Microsoft Int	ernet Explorer					<u>_8×</u>				
File Edit View Favorites Tools Help						20				
CMAC Human Canital Ma	n o close o inf				Susan Chris	tensen's Profile Home				
Human Capital Ma	nagement					Back To Log				
🗘 🛛 HCM Manager 🖉	General	General Desired Attributes								
Search Go	Skills 🕥	Training 😒	Licenses And Certifications 😒	Degrees 😒	rships 🕎					
🖃 🗁 HCM Manager	Description Experience	Description	Description	Name	Organization	Membership Type				
Ostion Control Job Classifications	No Records Found	No Records Found	No Records Found	High School	No Reco	rds Found				
Positions										
Organizational Chart Hiring Requisitions										
Applicant Management										
Performance Management										
Compensation Management File Maintenance										
🗄 🦲 Security										
·						-				

To add an attribute click on the Edit icon to the component required. This displays a list related to the attribute selected. From this list one or more attributes may be selected. Depending on the attribute type it may be possible to add criteria such as year of experience or State of license.

All attributes allow the attribute to be 'Required' or just nice to have.

List of Licenses and Certifications										
Code	Description	State	Lisence Status	🗖 Required	Select					
1000	Electrician 1st Class		Valid 💌							
2000	Gas Fitter - Ontario		Valid 💌							
CPR	CPR Life Saving Certificate		Valid 💌							
G-LICENSE	General Driver License		Valid 💌							
Z	Air Brakes Certification		Valid							

Pre-Requisites:

Mandatory: Nothing

Optional: Regions, Salary Grades, Skills, Education, Certification and Licenses, Training Courses and Modules, Memberships and Organizations.

Positions



Positions Details Maintenance

Positions should be setup as a one to one relationship with employees. No two employees can hold the same position and no two positions can have the same employee. Multiple employees may have the same job classification but each has a unique position. Take for example the Job Classification of Project Accountant there are probably one or more Project Accountants for each large project in progress. Each of these Project Accountants is a unique position.

Positions contain more information than just the position and the employee reference. They form the hierarchy of the organization. Each position should be defined to report to Job Position. This allows the Employee in the Job Position to change while maintaining the corporate organizational chart.

Each position created inherits default information from the related Job Classification, but this can be changed and customized for the specific position. Positions also have effective and expiry dates, and a region assigned that allows for the pay scale for a specific position to be different by region.

The History Tab on this screen displays a list of all changes made to this position, what changed, when and by whom.

Auto-numbering of Position IDs

It is possible to instruct the system to automatically generate Position IDs by setting a flag in System Options of the CMiC Enterprise. This flag is located on the Payroll tab and is labeled: "JSP Position ID Auto Numbering".

Pre-Requisites:

Mandatory: Job Classifications

Optional: Regions, Employees

Position Exception Reports

The Position Exception Report will provide a list of unfilled positions, positions with no reporting position and employees without a position. The print functionality is not available at this time.

Organizational Chart

The program displays a visual representation of the positions and the related reporting hierarchy. The program allows for the creation of new positions and the moving of positions individually or by a group to another area of the chart. This program makes changing the organizational structure an easy procedure.

Pre-Requisites:

Mandatory: Job Classifications

Optional: Positions, Regions

	: http://app4.cn	nc.ca:///9/test2005:SUE - Microsoft Internet explorer	
le Edit View Fav	vorites Tools	Help	🛛 Links 🎽 🖣 🕶
nd Flower Tarchouse Manager epi1002	Ging Gantia Regional Distri Manager - Rort Warnhouse Ma Dapt 1001	Bue Christenson President - 51 Corporation General Manager - Distribution West = Regional Distribution N West : Patic Point General Manager - Distribution Manager - Korth East Warehouse Manager Dept 1003 Warehouse Manager Dept 1004	
Ind Floor Vanhouse Manager - Papt 1002 - umy Colorado Narehouse Shipper # 1	Warnhouse Mai Dept 1001	ager - Patrick Photopon Werehouse Manager Dept 1003 Dept 1004	

An Organization may have multiple 'Org' charts depending on their structure. The Select Chart tab allows the user to select the required chart. A Chart is defined by a Position that does not report to anyone.

The Navigation tab allows you to zoom in/out to different sections of the chart.

			_
_		_	

The Navigation is controlled by where the 'White Space' is on the picture. Drag the white space to the area of the chart you want to view. To zoom in to more detail, move the zoom indicator to the right, to zoom out move it to the left.

To see the complete chart on the page use the [Fit Chart to Screen] button.

The **Legend** tab is a list indicating what the different colors and symbols mean.

LEGEND							
Open	+	Expand Tree					
Filled	-	Collapse Tree					
Pending							
Suspende	ed						
Terminate	ed						

Changing a Positions 'Reports To:' Setting

To change where a position reports, is as easy as dragging the position to the new report location. This will not only change the report of the current position it will automatically bring along any sub-reports.

Adding a new Position:

To add a new Position or to update an existing Position single click on the position to update. This will open a window showing the current information about this position.

Position:	General Mana	ager - Sales	E.		1
	Position Code:	MGR-SALES			
	Reports To:	President - S1 Corporation (429377): Chi		No Image Available	
	Classification:	HR-MANAGER-1			
	Region:	US North West	L		_
	Effective Date:	Month Day Year MM / DD / YYYY	Sander	son, Sandy S (ZZ-900)
	Expires:	MM / DD / YYYY	Status:	Pending	

It is now possible to change information regarding this position such as the employee associated with the position, the start/end date of the position, the reports to or the status. It is also possible to create a new direct report position by using the [**Create Direct Report**] button.

When saving an update or a new record, if any required data is missed, the field is shown boxed in red to make it easy to identify where the problem is. This method of creating or editing a position only deals with the key information about the position, updating information such as Job title, Job Summary, Responsibilities, etc. must be done via the Positions page.

Any changes or new positions created via this method will be reflected on the positions screen with the HCM application.

Hiring Requisitions

Requisitions

Requisitions								Check Spelling	Save Can	icel												
HCM Manager Search		General		Desired Attributes			Actions)^^												
	201	Requisition ID	R-DRYWAL]		Date	05 06 2008 🕎]												
Position Control		Requested By	J. Thomas			Proposed Hire Date	05 06 2008 🕎															
Hiring Requisitions		Job Classification	Drywallers			Status	Active															
		Position Name	Drywaller			Туре																
Requisition Status Report		Hiring Office	California			Recruiter	E. Phillipson		-	1												
Recruiter Requisition Activity Recruiter Requisition Activity Origineant Management Training Performance Management Origensation Management Origensation Management Origensation Management		Requisition Name	Drywaller Requisition			€ Full Time C Part Time	Temporary															
		Job Description	Apply plasterboard or othe	er wallboard to ceilings and inte	erior v	walls of buildings.			A													
 	F													Responsibilities	Trim rough edges from wa Install blanket insulation be Fit and fasten wallboard o Read blueprints and other	allboard to maintain even joints, stween studs and tack plastic r r sheetrock into specified posit specifications to determine me	, using noistu tion, u thod o	g knife. Ire barrier over insulation. Ising hand tools, portable powe of installation, work procedure:	er tools, or adhesive. s, and material and tool require	ments.	A	
		Notes							A.													
	T																					

Requisitions Entry Form

This page allows the user to enter a requisition to the HR department to start the hiring process for a new or existing position.

System Tables Maintenance - TEST2006 Sys	stem Options
ystem Options	
General Database Options Reports Financial	is Projects Assets Payroll
Default 1099 Code 1	1099 Misc Rents
Default Vendor Class OTH	OtherMisc
Priority From To	
Generate Timesheet Utility for E-Timesheet	
🔲 Payroll/ <u>H</u> R Auto Numbering	Add Hourly Premium to Zero Amount/Not Found Rate
🥅 Apply Company Security In Payroll	🔲 JSP Position ID Auto Numbering
🥅 Ē-Time: Restrict Access Codes By Company	JSP Requisition ID Auto Numbering
🔽 Greenshades Installed	Check Processing And Printing By Check Location
🥅 Mandatory Approver Priority Flag	
Preferred Rate: Check Employee Profile	
🔽 Union 🛛 🔽 Trade	

Auto-numbering can be applied to the Requisitions ID by setting the 'JSP Requisition ID Auto Numbering' flag in the Payroll tab of System Options (Forms version).

When entering the requisition, the Requisition Name, Job Description and Responsibilities will default from the Position selected. The Desired Attributes of the Requisition will default from the Job Classification. The Requisition Name defaults from the Job Title of the Position. If the Position Name is entered before the Job Classification, the associated Job Classification will be populated. The Hiring Office LOV provides a list of Geographical Areas.

The Hiring Requisitions page starts as a log displaying all Requisitions. To edit an existing requisition click on the link on the log or to add a new Requisition use the [**Create Requisition**] button.

There are three required fields when entering a Requisition. They are the Requisition ID, Job Classification and Position Name.

- The Requisition ID must be a unique code it can be characters or numbers with a maximum length of 10.
- Once the position is entered, the Requisition Name, Job Description and Responsibilities fields will be updated to match the position's definition.
- The Desired Attributes will default from the Job Classification.

Any of these defaulted fields may be changed including the Desired Attributes.

Pre-Requisites:

Mandatory: Job Classification, Position Name, Requisition ID.

Optional: Hiring Actions, Skills, Education, Certification and Licenses, Training Courses and Modules, Memberships and Organizations

General		Υ	Desired Attributes				Y	Actions			
Hiring Actions											
Action Name	Placed Adver	tisement	Cost Amount	250 Status Pen	iding 💌	Action Date	05 05	2008 🖳	Action taken by	J. Thoma	as
Notes	Advertisemen	t placed.						A V	From Date To Date	05 0: 05 1:	5 2008 5 2008
Action	Name	Cost Amount	Status	Notes	Ac	tion Date 🛛 F	rom Date	To Date	e Action tak	en by	Action
Requisition Cre	ated		COMPLETED	Requisition Created	05	5052008			HR		X
Placed Adverti	sement	250.00	PENDING	Advertisement placed.	05	052008 (05052008	0515200	18 J. Thomas		×

The Actions tab allows the user to update the history of what has happened to the requisition. This is the same functionality that is available via the Requisition Activity screen. When a new requisition is saved, an Action of "Requisition Created" is automatically created for the requisition.

The Action Name drop-down provides a list of Hiring Actions defined as Requisition Actions.

Pre-Requisites:

Mandatory: Action Name, Action Date.

Optional: Cost Amount, Status, Action Taken By, Notes, From Date, To Date.

Requisitions				Copy Requisition Add	Requisition Edit Delete	Back To Log					
HCM Manager Search	▲	General	Desired Attributes	Ac	tions						
		Requisition ID	R-DRYWAL	Date	2008-05-06						
HCM Manager		Requested By	J. Thomas	Proposed Hire Date	2008-05-06						
Hiring Requisitions		Job Classification	Drywallers	Status	Active						
🖻 🤭 Requisitions		Position Name	Drywaller	Туре	Addition 🗆 Replacement 🗹	3					
R-DRYWAL		Hiring Office	CAL California	Recruiter	EP E. Phillipson						
Requisition Status Report		Requisition Name	Drywaller Requisition	Full Time 🗹 Part Time 🗆	Temporary 🗆						
Recruiter Requisition Activity		Job Description	Apply plasterboard or other wallboard to ceilings and interior walls of buildings.								
Applicant Management Workforce Planning Training Performance Management							Responsibilities	Trim rough edges from wallboard to maintain even joints, using knife. Install blanket insulation between studs and tack plastic moisture barrier over insulati Fit and fasten wallboard or sheetrock into specified position, using hand tools, portal Read blueprits and other specifications to determine method of installation, work pr	on. ole power tools, or adhesiv ocedures, and material and	/e. I tool requirements.	
Compensation Management		Notes									
E E He Maintenance											

A requisition can also be copied to another requisition using the Copy Requisition button. This will open up a duplicate requisition screen where the user can edit the data for the new requisition.

Requisition Activity

🗉 🖳 🛛 HCM Manag	er 🗠			Requi	sitions			
earch	Go	Requisition ID	Date Created On	-	Job Classification	n		9
a 🦳 HCM Manager		Requisition ID	Requisition Date	Proposed	l Hire Date		Description	Statu
E Position Control		SSPMTX3	01/03/2005		01/05/2005	Project Manage	·	Filled
Job Classifications		CCABW	01/01/2006		03/12/2007	Sales Person		Closed
- Ositions		MZ01	01/01/2006		01/10/2006	Surveyors		Closed
Position Exception Report	s	ARCH1	01/01/2006			Office Personn	el	Filled
		REQSV1	01/01/2006		01/01/2006	Surveyors		Filled
😑 🗁 Hiring Requisitions		AD001R	01/01/2006		01/01/2006	Administrative A	lss't	Pending
		ADM001	01/01/2006		01/01/2006	Administrative A	lss't	Active
Requisition Activity		SRQ_PLUM	01/01/2006			Plumbers		Active
Applicant Management		MZ0009	01/01/2006		04/06/2006	Civil Engineer		Active
Tusisian		SRQ_BKPR	01/01/2006			Bookkeeper		Active
🕂 😋 Performance Management		RAR01	01/01/2006			Architect		Active
Compensation Management		HR-001	03/01/2006		31/01/2006	President		Active
Ele Maintenance		HR-002	16/01/2006		31/03/2006	Site Supervisor		Active
Security		6APMACCT01	05/06/2006		15/08/2006	Accountant		Filled
		SUPP-REP	03/07/2006		01/09/2006	Customer Servi	ce Rep	Active
				Actio	ns			
		Action Name	Co	st Amount	Action Date	Notes	Action taken by	Del
		External Add Placed		750.00	31/01/200)6	Bill Gustaw	>
		Internal Posting Completed		50.00	30/01/200)6	Bill Gustaw	>
		Action Name External Add Placed Internal Posting Completed	Co:	Action st Amount 750.00 50.00	Action Date 31/01/200 30/01/200	Notes 16	Action taken by Bill Gustaw Bill Gustaw	

Requisition Activity

Requisition Activity is both an entry and a query screen. It allows for the review of the actions taken on one or more requisitions and it allows for the updating of existing actions taken and the entry of new actions taken.

When this page is first opened it will display all requisitions.

Searching for Requisitions

To limit the requisitions displayed, you can [Search] by a specific requisition number, by date or by job classification.

Requisition ID

This field can be used to select a range of Requisition ID's by using the '%' wildcard characters either before or after the value – for example 1% will return any requisition ID that start with the number 1.

Date Created

This is a drop down list that allows the user to select one of 3 values, On, Before or After to determine how to utilize the actual date field. This allows for the querying of requisitions created on a specific date or after a specific date.

Job Classification

This field can be used to select a group of Positions with similar names by using the '%' wildcard characters either before or after the value – for example Elec% will return any requisition ID's for any Job Classification where the title of the classification starts with Elec.

Once the required requisition has been found, highlight the requisition clicking on the linked field. This will then display all related action records in the bottom section of the screen.

Adding a New Action Taken

To add an action to the requisition use the Add link on the 'Actions' bar. This will open up an area just under the bar where the action information can be entered.

					Actions						Save	a cancer
Action Name	External Ad P	Placed 🔻	Cost Amount	50	Status	Pending -	Action Date	01-01-20	12	Action taken by		
Notes	Need a new Pl	М							*	From Date To Date	01-02-2012	
Action	Name	Cost Amou	nt Status	Notes	Action Date	From Date	T	o Date	A	ction taken by	De	elete

- Selection the Action Name from the drop down list (Required)
- If applicable enter the cost amount, this is for reference only
- Enter the status
- Enter the date of the action (Required)
- Enter the employee who performed the action. This defaults to the user id.
- Enter any notes and dates if necessary.

When complete use the Save link.

Updating an Existing Action:

To edit an existing action taken, click on the lined field. This will then display the action information in the area just under the Actions section bar. Update the information as required and then save.

Requisition Status Report

The Requisition Status Report prints applicants and their associated requisitions based on the hiring office.

tus Report

			Requisition Status Report		-
Hiring Office Code	Hiring Office Name	Starting Level Position	Number Of Position Levels To 'Drill Down'	Select Hiring Offices To Run Report 🔲 Select All	
EC	East Coast USA	Accountant	0		
MIDWES	Midwest USE		0		
NORTHW	Northwest USA	A	0		
SOUTH	South USA		0		
USNE	US North East	A	0		
WC	West Coast USA	_	0		

Recruiter Requisition Activity

Recruiter Rec	quisit	ions Acti	vity							Tra	ansfer Requisition	ns
HCM Manager	<u>^</u>	J				Re	cruiters					<u>ک</u>
Search	Go	Recruiter Name			Search							
		Re E. Phillipson J. Drake K. Heigel	I cruiter Name I	Recruiter Cr EP ID (H	ode							
🗄 🦲 Security												-
						Rei	quisitions					
		Requisition Code	Job Classification		Requested By		Date	Proposed Job Title	Proposed Hire Date	Hiring Office	Status	1
		R-DRYWAL	Drywallers	J. Tł	nomas		2008-05-06	Drywaller Requisition	2008-05-06	California	Active	1
	¥											

The Recruiter Requisition Activity screen shows all open requisitions for the recruiter. The requisitions assigned to a recruiter can also be transferred to another recruiter.

🚰 http://test20	05.cmic.ca:7779 - Hire Applicant - Microsoft I 💶 🔲 🗙
	<u> </u>
	Transfer Requisitions
From Recruiter:	E. Phillipson
To Recruiter:	K. Heigel
	Transfer Cancel
	-
🞒 Done	🔲 🔮 Internet

Print Report

To transfer all open requisitions from one recruiter to another recruiter, press the Transfer Requisitions button. Then select the From Recruiter and the To Recruiter from the pop-up window. Press Transfer to move those requisitions to the new recruiter.

Applicant Self-Service & Applicant Management

Overview – Applicant Self-Service

Applicant:					Save Cancel
General Education Skills	License/Certificate Training	9 Membership Employment	References /	Additional Information	Application History
Position you are applying fo	rSelect Job Classification	Full Time	O Part Time		Temporary
Salary Desire	Select Pay Period 💌	Requisition Number:Not Spec	cified 💌		
Personal					
First Name	•	Last Name			
SSN (no space/hyphen		E-Mail Address	Rob@yoohoo.com		
Home Phone	:	Work Phone:			
Street	:	Suite:			
City, Stat	2	ZIP/Postal Code:			
Countr	· •				
Source of Applican	tOther	Application Date			
Gende	rSelect	Ethnicity/Race	Select	•	
Area Of Interest					
Area Of Interes	Administration Architectur	e and Planning Carpentry Carpentry	Electrical 🔲	Financials Position 🕅	HVAC Specialization 📃
Geographical Area					
Geographical Area	a East Coast USA 📃 Midwes	st USE Northwest USA	South USA 📃	US North East 📃	West Coast USA 📃

Sample of Applicant Self-Service screen, used by applicants to enter, review and update application information.

This program is designed to be run by applicants that are applying for a position within your organization. It provides applicants access to Applicant Self-Service so that they may enter, review and update application information for a job posting. Access to Applicant Self-Service is provided via a link, which can be added to a job posting (see the *Format Link to Applicant Self-Service* section for details).

Registration & Sign In

	Sign In	
Applicant's e-mail address:		
Enter Password:		
Register New User	Sign In Forgot Password?	

If the applicant has already registered with your organization they may type in their email address and the password that they created to enter the system in order to review or update their application.

If the user has not yet registered, they can do so by using the <u>Register New User</u> link, which will ask them for their email address and to create a password. Note, the email address is case sensitive.

If the applicant was previously registered with your organization, but forgot his/her password, they can click [**Forgot Password**]. On the next screen, the applicant would enter his/her email address, first name, and last name, then click [**Send Password**]. An email would then be sent to that email address with the previous login information that can be used to log in.

Format Link to Applicant Self-Service

For applicants, access to Applicant Self-Service is provided via a link, which can be added job postings or emails. The following provides details about how to format links to Applicant Self-Service.

Format for CMiC Enterprise Clients

The following is the format for links to Applicant Self-Service, with the *DATABASE_SERVER* and *ENVIRONMENT* parts being replacement fields:

http://DATABASE_SERVER/ENVIRONMENT/HrApplSelfServ

Replacement Fields

DATABASE_SERVER = path to database server running CMiC Enterprise

ENVIROMENT = which database environment to use

Example: http://test4v10.cmic.ca:7785/cmictestv10x/HrApplSelfServ

Format for CMiC Cloud Clients

The following is the format for links to Applicant Self-Service, with the *TENANTCODE* part being a replacement field:

https://hikuuapp.com/hikuuprod/HrApplSelfServ/?tenantCode=TENANTCODE

Replacement Fields

TENANTCODE = CMiC Cloud client's tenant code, identifying the CMiC Cloud client

Example: https://hikuuapp.com/hikuuprod/HrApplSelfServ/?tenantCode=ZZZ

Applicant Self-Service for Applicants

Applicant: Timmy Tim	nins						Save Cancel
General Education Skills	License/Certificate	Training	Membership	Employment	References	Additional Information	Application History
Position you are applying for	Carpenter Foreman		Full Time		O Part Time		Temporary
Salary Desired	Select Pay Period 💌		Requisition	Number:Not Speci	fied 💌		
Personal							
First Name	Timmy			Last Name	Timmins		
SSN (no space/hyphen)				E-Mail Address	Timmy@yoohoo.com		
Home Phone	2223334444			Work Phone:			
Street	535 Willow St.			Suite:			
City, State	Buffalo, New York			ZIP/Postal Code:	49823		
Country	•						
Source of Applican	Employee Referral			Application Date	2016-04-07		
Gender	Male			Ethnicity/Race	Decline to Respond	•	
Area Of Interest							
Area Of Interes	Administration	Architecture and Su	Planning 🛄 upervisor 🛄	Carpentry 📝	Electrical	Financials Position	HVAC Specialization
Geographical Area							
Geographical Area	East Coast USA 📝	Midwest US	SE 📃 Nort	nwest USA 📃	South USA 📃	US North East 📃	West Coast USA 📃

Once logged in, applicants can select the position to apply for, via the **Position you are applying for** dropdown list, and the corresponding **Requisition Number**. The applicant can then enter their contact information, education, skills, licenses/certifications, training, memberships, employment history, references and any additional information, through the corresponding tabs. They may also select preferred areas of interest and geographical areas.

The [Upload Resume] button can be used to upload as many documents that the applicant wishes, such as resumes and cover-letters.

If the applicant wishes to apply for a second position, he/she would save the first application, then select the second position for which they are applying from the drop-down list of job classifications, select a corresponding **Requisition Number**, enter the relevant information and save the application.

	Appleant: Timmy Timmins										
General	Education	Skills	License/Certificate	Training	Membership	Employment	References	Additi	ional Information	Application History	
Appl	lication Code		Job Classification Code		Descript	ion	Last Updated		Status	Requisition No	
8962299		6520			Carpenter Foreman		Apr/07/2016		Applied		
8962611	6510		Carpenter		Apr/07/2016		Applied				

For each of those saved applications, an application record is created in the **Application History** tab, shown above.

Applicant Self-Service for Administrators

NICM Manager Applicant: Dorna. Johnson Search Origo Mich Manager Application Charled Application Date 2007-10-15 Postion Control Number B63280 Last Modified Date 2007-10-15 Postion Exception Reports Organizational Charled Source of Applicant: Philos Reputation Activity Postion Exception Reports Reputation Activity B63280 Last Modified Date 2007-10-15 Postion Exception Reports Control First Name [®] Dorna Pertonel Postion Exception Reports Control First Name [®] Dorna Pertonel Postion Exception Reports Control First Name [®] Dorna Pertonel Applicant Schools First Name [®] Dorna Employed As Pertonel Applicant Schools First Name [®] Address 2 Pertonel Address 2 Pertonel Applicant Schools Applicant Schools First Name [®] Desception Address 2 Pertonel Address 2 Pertonel Address 2 Pertonel Address 3 ZP Pertonel Pertonel Pertonel Address 3 ZP	Applicants			Save Cancel
Seech General Personal Miscelaneous Attributes Empiristory Attachments References Application History Foreign Control Personal Miscelaneous Attributes Empiristory Attachments References Application History Source of Applicant Personal Miscelaneous Attributes Empiristory Attachments References Application History Source of Applicant Personal Miscelaneous Attributes Empiristory Attachments References Application History Source of Applicant Personal Miscelaneous Attributes Empiristory Attachments References Application History Source of Applicant Personal Miscelaneous Attributes Empiristory Attributes Control Personal Miscelaneous Attributes Empiristory Attributes Control Personal Miscelaneous Attributes Empiristory Attributes Empiristory Attributes Control Personal Miscelaneous Attributes Empiristory Attributes Empiristory Attributes Control Personal Miscelaneous Attributes Empiristory Attributes Attributes Empiristory Attributes Empiristory Attributes Empiristory Attributes Attri	수 🖻 🖻 🛛 HCM Manager	Applicant: Donna Johnson		
Pictor Source of Application Application Decision Application Decision Pictor Pictor Source of Application Source of Application Pictor Pictor Source of Application First Name* Pictor Pictor Source of Application First Name* Pictor Pictor Source of Application Source of Application Pictor Pictor Address 1 IP Ridge Avenue Address 2 Pictor Address 1 IP Ridge Avenue Address 2 Pictor Address 1 IP Ridge Avenue Address 2 Pictor Address 3 Source of Address 2 Image: Source of Address 3 Pictor Address 3 Source of Address 3 Source of Address 2 Pictor Address 3 Source of Address 3 Source of Address 3 Pictor Pictor Address 3 Source of Address 3 Pictor Address 1 IP Ridge Avenue Address 3 Pictor Address 3 Source of Address 4 Pictor Address 4<	Search Go	General Personal Miscellaneous	Attributes Emp.History Attachments	References Application History
Requisitions Workforce Planning Courses and Modules Casses Casses Casses Courty Madress 1 Review Self-Service Enrolment County County Mone Phone (312) 555-2099 Work Phone (312) 555-2310 Mone Phone (312) 555-7341 Performance Management Work Phone Work Pager Home Pax Work Pager Work Pager Review Self-Service Enrolment Review Self-Service Enrolment Review Self-Service Enrolment County Mone Phone (312) 555-2309 Work Phone (312) 555-7341 Performance Planse Mail Address Address djoinson@hr.com Area Of Interest Administration Area Of Interest	Control Contr	Source of Applicant [Chicago Sun Times Number] 653280 Last Name" Johnson Middle Name [SSN (no space/hyphen) 561701337 Mailing Address Address 1 10 Ridge Avenue Address 3]	Application Date Application Date Last Modified Date First Name Employed As Status Address 2 ZIF	2007-10-15 2007-10-15 Donna Donna Dopen B0609 B0
Courses and Modules Courtery and Modules Courtery United States of America Courtery Courter	Requisitions Workforce Planning Resource Scheduling Training	Address 1 10 Ridge Avenue Address 3	Address 2	
Contact Contac	Courses and Modules Classes Training Nominations Class Enrollment Class Enrollment	Country United States of Arr	nerica State	IL CHI
Performance management Performance Management Home Fax Work Fax Work Fax Work Fax Defendence Stand Def	Review Self-Service Enrollment Review Self-Service Enrollment Training Records Trainer Evaluations Review Trainer Evaluations Review	Contact Home Phone (312) 555-2099 Cell Phone (312) 555-7341	VVork Phone Pager	(312) 555-2310
Area Of Interest Administration Architecture and Planning Carpentry Project Management Supervisor Other:		Home Fax E-Mail Address djohnson@hr.com Area Of Interest	Work Fax	
	Annual Evaluations	Area Of Interest Administration Conterest	Architecture and Planning 🔽 Carpentry 🗌 Project Manag	jement 🗹 Supervisor 🗌

The Applicant Self-Service screen is intended to be used by HR staff to review and update the applicant record with relevant information collected during the hiring process such as reference checks and interview notes. To view an applicant record, select the applicant from the log by clicking on the linked field.

This will open the applicant's application form, where it is possible to update any information regarding the applicant.

Applicant information is split into sections each defined by a tab. The General tab as shown above is the basic contact information regarding the applicant. The Applicant Number assigned when the applicant record is created is the next number in the sequence of employee numbers. Data entered on the General tab will be carried forward onto the employee record as the defaults if and when the applicant is hired.

CON CMIC										Suzette Watson's F	rofile Home
Applicants										Add Edit	Back To Log
Organizational Chart	-[Applicant: Lisa Ro	lands							<u>^</u>
🖃 🤭 Hiring Requisitions		General	Personal	Miscellaneous	Attributes	Emp.H	listory	Attachments	References	Application Histor	Y
Carlo Requisitions				-			-				
Requisition Activity			Gender	Male				Ethnicity	Unknown		
Applicant Management	-1		Military Status	Not veteran				Marital Status	Single		
Applicant Service			Resident Status	Citizen				Dominant Hand	Right Handed		
Lisa Rolands			Date of Birth					Place of Birth			
- Requisitions			Disability								
🖃 🗁 Workforce Planning			Discionity								
Resource Scheduling			Able to Travel	NO				Distance			
🖻 🗁 Training											
Class Enrollment											
Training Records											
Trainer Evaluations											
Trainer Evaluations Review											
- Performance Management											
Job Classification Performance Stand											
Discrete Incidents											
Interim Evaluations											
Annual Evaluations											
Compensation Management											
Salary Planning											
Salary Surveys											
File Maintenance											
Skills											
Education											
Hiring Actions											
Trainers											
Irainer Evaluation Ratings	•										_
											*

The Personal tab contains HR type information and again this information will be carried forward onto the employee record as the defaults if and when the applicant is hired.

A lot of the information on this tab is used only for EEO and Veterans reporting.



The Miscellaneous tab is used to record information about the application. Most of the information entered on this screen is for reference only and can be accessed for reporting purposes via Discoverer.

The Attributes tab is where education and training related information about the applicant is entered. Attributes are broken down into 5 components:

- Skills
- Training
- Licenses and Certifications
- Education
- Memberships.

One or all of these components can have multiple attributes, some may be required others just nice to have.

Applicants						<u>Suzette V</u>	/atson's Profile Home
Organizational Chart	Applicant:	Lisa Rolands					<u></u>
E C Hiring Requisitions	General Persona	al 📝 Miso	cellaneous Attr	ibutes Emp.History	Attachments	References Applica	ion History
- Carlo Requisitions	chille (3)		Testining (2)	Lisenses And Contifications 53	Education (3)	Manahasahina	\$ T \
Requisition Activity	SKIIIS V		rraining 😼	Licenses And Cerdifications	Education V	wembersnips	<u></u>
Applicant Wanagement	Description	Experience	Description	Description	Name	Organization	Membership Type
Applicant Self-Selfvice	Cabling and Wiring	24	Air Brakes Operations	Air Brakes	Associates Degree	Erindale SS	Lifetime
Lies Rolande	Plastering	20	Computers 101	Red Cross CPR Certification		Ryerson Polytechnical Institut	Lifetime
Requisitions	Tile and Terrazzo Cutting	24				Silver Creek	Annual
Norkforce Planning						Credit Woodlands HS	Annual
Resource Scheduling			1			r.	
Courses and Modules							
Classes							
Training Nominations							
Class Enrollment							
- Review Self-Service Enrollment							
Training Records							
Trainer Evaluations							
Trainer Evaluations Review							
Performance Management							
Job Classification Performance Stand							
- Annual Evaluations							
Compensation Management							
Salary Planning							
- Salary History							
E C File Maintenance							
Skills							
Degrees							
- Education							
Certifications and Licenses							
Trainers							
Trainer Evaluation Ratings							
							7

To add an attribute click on the 'EDIT' icon to the component required. This displays a list related to the attribute selected. From this list one or more attributes may be selected. Depending on the attribute type it may be possible to add criteria such as years of experience, institution, year completed, etc.

		List of Education			
Code	Description	Institution	Degree Years	Year Completed	Select
BA	Bachelor of Arts	University Central Florida 💌 B-Comm	4	1984	N
BSC	Bachelor of Science	Other			
CARP.TRDE	Carpentry Trades	Other			
ELEC.TRDE	Electrical Trades	Other			
ENGINEER M	Masters of Engineering	Other			
ENGINEER P	Engineering PHD	Other			
GRADE	Grade School	Other			
HIGHSCHOOL	High School	Other			
HOD	Hod Carrier Apprenticeship	Other			
MA	MBA	University Central Florida TMBA - Business Admin	1	1985	V

The **Employment History** tab is where details of the applicant's previous employment records are kept. This tab allows you to create new records or update/delete existing records.

Applicants					<u>Suzette V</u>	Vatson's Profile Home Save Cancel
💠 🛛 🗛 HCM Manager	Applicant:	Lisa Rolands				A
Search Go	General Person	al Miscellaneous Attrib	tes Emp.History	Attachments	References Applicat	ion History
⊡- 🗁 HCM Manager	Company Name	Company2	Start Date 02 15 2	003 🖳	End Date 12 01 200	5 💻
Job Classifications	Street	23 Palisade Road	City State Chicago, IL			
	Phone Number	(312) 555-6122	Job Title Project Acco	ountant	Supervisor Name	
Organizational Chart	Starting Wage	27	Final Wage 29		Pay Rate Period Hourly	•
	Leave reason	Company closed]		
Requisition Activity Applicant Management	Company	Job Title	Start Date	End Date	Leave Reason	Action
Applicant Self-Service	Company1	Accountant	01012002	02012003	Contract ended	X
😑 🔁 Applicants	Company2	Project Accountant	02152003	12012005	Company closed	×
Requisitions Werkforce Planning Training Courses and Modules Classes Training Noninations Classes Training Records Trainer Evaluations Trainer Evaluations Performance Management Notable Incidents Notable Incidents Notable Incidents Salary Marring Salar						*

The **Employment History** tab starts with a log view. To view the details of a specific employment record click on the linked field.

Applicants									Suzette	Watson's Profile H	<u>tome</u>
💠 HCM Manager 🔺										Upload Resum	e 🔺
Search Go		Applicant: Lis	a Rolands								
🖃 🗁 HCM Manager	General	Personal	Miscellaneo	us Attributes	Emp.	History	Attachments	References	Applic	ation History	
E Control		File Name		Upload Date			Note			Action	
Job Classifications	Resume.doc			05012007		Resume				Si 🗙	-
Position Exception Reports	CoverLetter.do	ic .		05012007		Application	Cover Letter			Si 🗙	
Organizational Chart											
Hiring Requisitions											
Requisitions											
Applicant Mapagement											
Applicant Self-Service											
😑 🦳 Applicants											
Lisa Rolands											
Requisitions											
Resource Scheduling											
E- Contraining											
Courses and Modules											
Classes											
Class Enrolment											
Review Self-Service Enrollment	1										
Training Records											
Trainer Evaluations											
Trainer Evaluations Review											
- O Job Classification Performance Stand											
Employee Performance Plans											
- Notable Incidents											
Interim Evaluations											
Annual Evaluations											
Salary Planning											
Salary History											
Salary Surveys											
- 🗁 User-Defined Logs 🗸 🗸	1										
	1										-

The **Attachments** tab may contain any number of documents uploaded by the applicant. To open one of the documents just click on the linked field name.

Applicants								<u>Su</u>	zette Watson's I	Profile Home
										ave cancer
💠 HCM Manager 🔺	App	licant: Lisa Roland	ds							*
Search Go	General	Personal 🛛 🕅 M	fiscellaneous	Attributes	Emp.History	Attachments	Referenc	es 🗸 A	pplication Histor	у
🖃 🗁 HCM Manager	First Name	Peter		Middle Name			Last Name	Johnston		
Position Control Job Classifications	Organization	Company		Palation	Managar	1	Contact Date			
- Positions	Organization	Company		Relation	Iwanager]	Contact Date			
Position Exception Reports	Phone	(312) 555-2345		Atter Phone			Cell Phone			
Organizational Chart Figure Hiring Requisitions	E-Mail Address			Fax			Rating	Excellent	¥	
Requisitions	Employed From			Employed To			Time Known			
Requisition Activity		a alf us ativate at								
Applicant Management		well organized								
E C Applicants	Description									
Lisa Rolands		L								Y
Requisitions										A
Workforce Planning	Name Datas Jaka stas	Ro	elation Or	ganization	Phone (040) 555 2045		intact Date	EXCELLENT	ng	Action
Resource scheduling	Peter Jonnston	Wanag	er Company	0	(312) 333-2345			EAGELLENT		^
Courses and Modules										
Classes										
- Training Nominations										
— Review Self-Service Enrollment										
Training Records										
Trainer Evaluations										
Performance Management										
Job Classification Performance Stand										
Employee Performance Plans										
Appual Evaluations										
Salary Planning										
Salary History										
Salary Surveys										
- Contract Logs										
	1									-

The **References** tab is used to record information regarding reference checks performed. Again this tab opens in with a view of all entered references. As a user you may edit an existing one by clicking on the linked field or create a new reference by using the [Add] button.

Applicants														
🗘 HCM Manager		Applica	ant: Gerald	line Donnelly										Add
Search Go	Genera	I Y Pers	onal Y	Miscellaneous	Attribute	is Y Emp	History	Attac	hments Y	References	Notes	Appli	cation Hist	ory
E CM Manager	Арр	ication Code		Job Classificati	ion Code	0	escription		Apply Date	Statu	s Requisit	tion No	Edit	Delete
Position Control	233316		ELOS	1		Electrical A	pprentice		06162008	APPLIED	SS-ELEA-R	Q	<u>S</u>	×
Applicant Management	233318		PH01			Photograph	ers		06162008	APPLIED	RSS-PHOTO	5	<u>S</u>	×
Applicant Self-Service														
🗈 🗀 Applicants														
Hired Applicants														
Application Actions														
Requisitions														
Applicant Pipeline Report														
Workforce Planning														
Training Destampanae Management														
Salary Planning														
Salary Surveys					Actio	ns					lire Reject App	lication	Reject /	pplicant
User-Defined Logs Elle Maintenance	Action	Due Date	Alert Date	Completion Date	e Action Date	Status	O constant las	0	Notes		Completion Notes	Priority	Action tak	an by Edit
+ Security	Applied	00470000	00470000	06162006	00102000	COMPLETED	Applied by	y George E	srown	0 # 7 00		3	George Bi	own M
	Interview	S 06172008	06172008		06162008	PENDING	Applicant	scheduled	i tor an interviev	W ON 6/17/08		3	George Bi	own 🔄
	×													·

The **Application History** tab displays a log of applications submitted by the applicant. For each application, a list of 'Actions' is maintained. A [+] sign in the Actions block allows manual entry of Actions. These actions are based on entries in the Hiring Actions table. An action with status 'Applied' is automatically created for each new application entered through Applicant Self-Serve with the date set to the system date. The "Action Taken By" field is automatically updated with the name of the user. Applications may be added to an applicant by clicking the [Add] button at the top of the screen or deleted using the 'X' beside the application.

🍯 http://test2005.ci		est2005/HrAppl	icant/showHRReq		qOraseq=unde	fi - Microsoft Int	ernet Explorer		<u>_ ×</u>
								Save	Cancel 📥
			Ac	dd Application					
Job Classification Code	RF01	Description	Master Roofer		Apply Date 09	21 2007 🕎	Requisition No.	REQ_ROOFER	
Application Co	ode	Job Classificatio	n Code	Descripti	ion	Apply Date	Status	Requisition No	
			No	Records Found					
1									
									_
, E								🥝 Internet	

This brings up an Add Application pop-up where the user can select a requisition to add to the applicant's applications and enter the Apply date. The icon beside each application allows the user to edit an existing application by selecting another requisition for the specified job classification.

The [Hire] link changes the applicant's status to Hiring Pending and the applicant's record is added to the Hired Applicants list of applicants. The Requisition Status is updated to "Hiring in Progress". The [Reject Application] link changes the status of the application to Rejected and the applicant's status to Open. The [Reject Applicant] link changes the application's status to Rejected and the applicant's status to Closed.

Hired Applicants Human Capital Management Show Filter Applicant Nam arch Go 4 2005-14@cmic.ca Taylor Cran 2005-14 206182 206469 209916 210933 211020 211869 211917 214650 🗁 HCM Manager Pauline Long Position Control Bill Brady Job Classifications Positions Position Exception Reports Fred Sanderson Devon Walter Melissa Wellingto Organizational Chart Laura Fanning Melinda Chesne Requisitions Requisition Activity Applicant Management Applicant Self-Service Emerald Bridget Total (9 rows Applicants Hired Applicants Requisitions Resource Scheduling 😑 👝 Training Courses and Modules Classes and woode. Classes Training Nominations Class Enrollment Review Self-Service Enrollment Training Records Trainer Evaluations Trainer Evaluations Review Performance Management Job Classification Performance Stand Employee Performance Plans Notable Incidents 🦰 Interim Evaluations Annual Evaluations Compensation Management Salary History Salary Surveys

This screen provides a list of applicants that have been hired from the Applicants screen when the Hire link was selected. If this is the first time that the applicant is being hired, the Rehire status is 'N'. If the applicant was hired then terminated, then submitted another application and was hired again, the Rehire status will be 'Y'.

-

🖉 http://test200	5.cmic.ca:7779 - Hire Ap	plicant - Microso	_ 🗆 🗙
			*
Employee Number :	987897897897901		
Requisition Number :	RQ-STRENG]	
Company :	Select Company		
	Hire Cancel		
			-
) E Done		🥝 Internet	

When the user clicks on the Applicant's name, a pop-up with the new employee number, associated requisition and company is displayed. The applicant number becomes the employee number. When the user selects the necessary data and clicks on the [**Hire**] button, the employee profile is displayed.

🚰 http://test2005.cmic.ca:777	79 - Applicants - Microso	oft Internet Explorer				
Employee: Nancy	Craft	Employee Number: 9	87897897897901		:	Save Cancel
Personal Com	pany Rate	s/Salary	Address Y	Tax HR Info	Secur	ity
First Name	Nancy]	Las	st Name Craft		
Initial	A.]		Alias		
Prefix]		Suffix		
SIN/SSN	287458900		101-11	Type Salaried		
Allow Accrued Leave			vvork	status Ivvorking		
			Linion Membereh	nin Data		
Unionizea			Union Membersh			
			Desire (Devisit		
Union Mem No		1	Pension r	Regino		
Place of Birth]				
Date of Birth	09 23 1965 🕎]				
Hire Date 01 1	5 2008	Seni	ority Date		Work Days/Year	260
Terminate Date		Next Rev	view Date		Hours/Year	2080
Rehire Date		Adjusted Ser	vice Date		Service/Years	
Date Deceased						
e					🔹 🚺 🔡 Intern	et

All data required for the employee must be entered to complete hiring of the applicant. Upon saving the employee, a new employee record is created and the applicant is removed from the Applicant log and the Hired Applicants log. The status of the Requisition and Position are updated to "Filled".

Applications

Show Filter Send To Spreadsheet Enter Query

	Applications Log												
Applicant Name	Application Date	Application Notes	Application Status	Job Classification									
 John Davis 	05-03-2013			Management Analyst									
 Austin Jane 	15-02-2013	Applied by Austin Jane	APPLIED										
 Austin Jane 	15-02-2013	Applied by Austin Jane	APPLIED	Accountant									
Farnaz Harraji	15-09-2011	Hired by Ludmila Goldstein	HIREPENDIN	Project Manager									
Zohreh Allameh	12-02-2013	Hired by Ludmila Goldstein	HIREPENDIN	Accountant									
 West Jeremy 	11-02-2013	Applied by West Jeremy	APPLIED	Management Analyst									
 John Davis 	11-02-2013			Surveyors									
 John Crane 	15-11-2012	Applied by John Crane	APPLIED										
 Anita Simpson 	24-08-2011	Hired by Suzette Watson	HIREPENDIN	Payroll Clerk									
 Dallas McLean 	15-07-2011	Rejected by Database Administrator. Hired on another application.	REJECTED	Payroll Clerk									
 Dallas McLean 	15-07-2011	Hired by Database Administrator	HIREPENDIN	Payroll Clerk									
Total (11 rows)													

The Applications Log provides a list of all applications for all applicants. The first number beside the link in bold is a count of applications that have not yet been viewed. The number in blue is a count of new applications. Similarly, applications in bold are applications that have not yet been viewed. Once an application is viewed from the log, the count is decreased by one. The applications in blue are new applications and the ones in black are the ones that have been modified. Clicking on an application will take the user to the Application in the Application History tab of the Applicant screen.

Applicant Information

٣°	Human Capital Ma	ana	agem	ent																Add	Applicar	t St	how Filter	Send To	o Spreadal	neet Ent	Home ter Query
) de	HCM Manager	-											Applicar	t Inform	nation						_			_		_	
Search	Go		Applica	Applican	Apply Date	Sin No	Employee	Applicant	Status	Status	Mailing	Mailing	Mailing	Mailing Zip	County	County Name	State	State Name	County	County	City	Sity	Physical	Physical	Physical	Physical Zip	Reside
🗆 🗁 HC	M Manager		-	Name			-	Status	Code	Desc	Adress1	Adress2	Adress3	Code	Code		Code		Code	Name	Code N	ame A	Adress1	Adress2	Adress3	Code	Lattur
÷	Position Control		-							Level							_					_		_		_	
	Dob Classifications Positions		4 1	Darren Bilings	21/Sep/2009	565456556		Hired	LVL1PASS	One Pass	22			12456	US	United States of America	NY									12456	
	Organizational Chart		104421	Roy Collin	s 28/Jan/2010	618294820		Hired			2350 Hunt Street			60601	US	United States of America	L.	Ilinois									
	Hiring Requisitions		104421	Jeff Parke	r 01/Oct/2010	564738292		Application Pending			10 Ross Road		Mount Pleasant	60609	US	United States of America	L	Ilinois				1	10 Ross Road		Mount Pleasant	60609	
	Requisition Activity Requisition Status Report Recruiter Requisition Activity		104421	Fred Forrester	18/Nov/2010	102938475	1044214	Hired			45 Burberry Lane		Manhattan	10002	us	United States of America	NY	New York									
0	Applicant Management Applicant Self-Service Applicants Nicel Applicants		104421	Ronald McKensie	18/Nov/2010	981728374		Application Pending			6 Fairweather Road	Suite 20	Buffalo, NY	10001	us	United States of America	NY	New York									
	Applications (2)		104421	Franklin Hardy	04/Mar/2011	621510555		Application Pending							US	United States of America										10001	
	Application Actions		104421	Antonio Banderas	14/Mar/2011	801235400	1044217	Hired																			
	Position Applicants		104421	Stanley Roper	14/Mar/2011	659801279		Application Pending																			
ė 😂	Workforce Planning		104421	Brooks	15/Mar/2011	326059801	1044219	Hired																			
0	Training	-	104422	Jared Cooper	29/Mar/2011	265987012	1044220	Hired																			
	Classes		104422	Daniel Rock	31/Mar/2011	598701214	1044221	Hired																			
	My Class Enrolment		104422	Dallas McLean	15/Jul/2011	463979737		Application Pending			123456 Dept Length		Chicago, Ilinois	60601	US	United States of America	L	Ilinois									
	My Course Enrolment		104422	Robert ` Wilkes	18/Jul/2011			Application Pending																			

The Applicant Information Log provides a list of the information of all the applicants. A new applicant can be created from this screen using the 'Add Applicant' button.

Application Actions

44	Applicant No.	Name	Date	Job Classification Code	Job Classification	Requisition Number	Application Application	Action Code	Printity	Action Note	Status Code	Hiring Office	Requisition ID
	1044214	Jeremy Forrester	18-11-2010	372	Draffsman	246896		HIRED	3	Hired by Database Administrator	COMPLETED	EC USNE	SWC-DRETRO
1	1044214	Jeremy Forrester	18-11-2010	372	Draftsman	246896		APPLIED	3	Applied by Suzette Watson	COMPLETED	EC. USNE	SWC-DRFTRQ
	1044217	Antonio Banderas	14-03-2011	326	Photographers	2434768		APPLIED	3	Applied by Suzette Watson	COMPLETED		0000000001
I I	1044217	Antonio Banderas	14-03-2011	326	Photographers	2434768		HIRED		Hired by Suzette Watson	COMPLETED		0000000001
1	1044219	Lester Brooks	15-03-2011	1412	Accountant	2434986		HIRED		Hired by Suzette Watson	COMPLETED		0000000002
	1044219	Lester Brooks	15-03-2011	1412	Accountant	2434986		APPLIED	3	Applied by Suzette Watson	COMPLETED		000000002
4	1044220	Jared Cooper	29-11-2010	MNGR	Senior Level Manager	2442491		HIRED		Hired by Suzette Watson	COMPLETED		000000003
•	1044220	Jared Cooper	29-11-2010	MNGR	Senior Level Manager	2442491		APPLIED	3	Applied by Suzette Watson	COMPLETED		000000003
•	1044221	Daniel Rock	31-03-2011	6510	Carpenter	2444623		HIRED		Hired by Suzette Watson	COMPLETED		000000004
•	1044221	Daniel Rock	31-03-2011	6510	Carpenter	2444623		APPLIED	3	Applied by Suzette Watson	COMPLETED		000000004
4	1044224	Dallas McLean	15-07-2011	4713	Payroll Clerk	2506281		REJECTED		Rejected by Database Administrator. Hired on another application.	COMPLETED		000000005
	1044224	Dallas McLean	15-07-2011	4713	Payroll Clerk	2507064		HIRED		Hired by Database Administrator	COMPLETED		000000006
4	1044224	Dallas McLean	15-07-2011	4713	Payroll Clerk	2507064		APPLIED		Applied by Dallas McLean	COMPLETED		000000006
•	1044224	Dallas McLean	15-07-2011	4713	Payroll Clerk	2506281		APPLIED		Applied by Dallas McLean	COMPLETED		000000005
•	1044224	Dallas McLean	15-07-2011	4713	Payroll Clerk	2506281		APPLIED		Unhired by Suzette Watson	COMPLETED		000000005
•	1044224	Dallas McLean	15-07-2011	4713	Payroll Clerk	2506281		HIRED		Hired by Suzette Watson	COMPLETED		000000005
•	1044226	West Jeremy	11-02-2013	142	Management Analyst	2520939		APPLIED		Applied by West Jeremy	COMPLETED	EC, USNE	000000007
•	74859667	Anita Simpson	24-08-2011	4713	Payroll Clerk	2506281		APPLIED	3	Applied by Suzette Watson	COMPLETED		000000005
•	74859667	Anita Simpson	24-08-2011	4713	Payroll Clerk	2506281		HIRED		Hired by Suzette Watson	COMPLETED		000000005
1	74859668	Farnaz Harraji	15-09-2011	PRMG	Project Manager	246900		HIRED		Hired by Ludmila Goldstein	COMPLETED	EC	SWC-PMRQ
•	74859668	Farnaz Harraji	15-09-2011	PRMG	Project Manager	246900		APPL-OFFER	3		COMPLETED	EC	SWC-PMRQ
•	74859668	Farnaz Harraji	15-09-2011	PRMG	Project Manager	246900		HIRED		Hired by Suzette Watson	COMPLETED	EC	SWC-PMRQ
•	74859668	Farnaz Harraji	15-09-2011	PRMG	Project Manager	246900		APPLIED	3	Applied by Farnaz Harraji	COMPLETED	EC	SWC-PMRQ
1	74859668	Farnaz Harraji	15-09-2011	PRMG	Project Manager	246900		APPLIED		Unhired by Ludmila Goldstein	COMPLETED	EC	SWC-PMRQ
•	74859673	Naz Clark	08-11-2011	1634	Industrial Engineer	2597811		APPLIED		Applied by Naz Clark	COMPLETED		800000008
1	74859673	Naz Clark	08-11-2011	1634	Industrial Engineer	2597811		APPL-OFFER	3		PENDING		8000000008
•	74859673	Naz Clark	08-11-2011	1634	Industrial Engineer	2597811		HIRED		Hired by Ludmila Goldstein	COMPLETED		800000008
	74859678	Jane Austin	12-02-2013	1412	Accountant	2878311		1ST INTERV	3		COMPLETED		000000009
	74859678	Jane Austin	12-02-2013	1412	Accountant	2878311		REJECTED		Rejected by HR. Closed	COMPLETED		000000009
1	74859678	Jane Austin	12-02-2013	1412	Accountant	2878311		APPLIED		Applied by Jane Austin	COMPLETED		000000009
•	74859679	Zohreh Allameh	12-02-2013	1412	Accountant	2878311		APPLIED	3	Applied by Ludmila Goldstein	COMPLETED		000000009
1	74859679	Zohreh Allameh	12-02-2013	1412	Accountant	2878311		HIRED		Hired by Ludmila Goldstein	COMPLETED		000000009
•	74859683	Austin Jane	15-02-2013	1412	Accountant			APPLIED		Applied by Austin Jane	COMPLETED		

The Application Actions Log provides a list of application actions for all applications.

General Personal Miscellaneous Attrbutes Emp.History Attachments References Notes Application History HR Do Application Code Job Classification Code Description Apply Date Status Requisition No Edit 246838 372 Draftsman 18-11-2010 HRED SWC-DRFTRQ S3 4 Actions Actions Actions Actions Actions Action Tates Priority Action Tates	nents
Application Code Job Classification Code Description Apply Date Status Requisition No Edit 246888 372 Draftsman 18-11-2010 HRED SWC-DRFTRQ SWC-DRFTRQ	
2468988 372 Draftsman 18-11-2010 HRED SWC-DRFTRQ Syl 4 Actions Actions Action Index Priority Action Index	Delete
Actions Actions Actions Actions Actions Actions Actions	×
Actions Actions Actions Actions Actions Notes Completion Notes Priority Action taken	
Actions Actions Actions Notes Priority Action taken	
Actions Actions Priority Action takes Completion Notes Priority Action taken	
4 Actions Actions Actions Completion Notes Priority Action taken	
4 Actions Action Due Date Alert Date Completion Date Action Date Status Notes Completion Notes Priority Action taken	
Actions Actions Priority Action taken	
Actions Actions Actions Actions Actions Actions	
Actions Action Due Date Alert Date Completion Date Action Date Status Notes Completion Notes Priority Action taken	
Actions Action Due Date Alert Date Completion Date Action Date Status Notes Completion Notes Priority Action taken	
Actions Action Due Date Alert Date Completion Date Action Date Status Notes Completion Notes Priority Action taken	
Actions Actions Actions Action Date Action Date Status Notes Completion Notes Priority Action taken	
Action Due Date Alert Date Completion Date Action Date Status Notes Completion Notes Priority Action taken	•
	4
Hired 31-10-2011 31-10-2011 31-10-2011 COMPLETED Hired by Database Administrator Employee is hired through HCM 3 Database Administrator	► Edit
Applied 31-10-2011 18-11-2010 COMPLETED Applied by Suzette Watson 3 Suzette Watson	Edit
	Edit

When user clicks on Application Number he gets all the information about the applicant on the screen including "Action" bottom screen with the records about hiring process of the specific applicant.

Applicant: Jeremy Forrester											
General	Personal		Miscellaneous	Attributes	Emp.History	Attachments	References	Notes	Application History	HR Docum	nents
	Application Code		Job Cla	ssification Code		Description	Apply Date	Status	Requisition No	Edit	Delete
246898			372		Dra	iftsman	18-11-2010	HIRED	SWC-DRFTRQ	<u>S</u>	×
1											
4											
•											
Action	Due Date	Alert Date	Completion Date	Action Date	Status	Actions	s	Completion Note	es Priority	Action taken by	Edit
Hired	31-10-2011		31-10-2011	31-10-2011	COMPLETED	Hired by Database Admini	istrator Empl	lovee is hired through HCI	V 3	Database Administrator	(3)
Applied			31-10-2011	18-11-2010	COMPLETED	Applied by Suzette Watso	in		3	Suzette Watson	N
											+
1											

Requisitions

Requisitions								
Requisition ID		Date Created On	-	Job Classification Sele	ect 💌		Search	
Requisition D	Date		Description	Status	Hiring Office		Action	
SWC-SURV	01-01-2010	Surveyors		Pending	US North East	View deta	ils	
SWC-PMRQ	01-11-2010	Project Manager		Hiring In Progress	Midwest USE	View deta	ils	
SWC-DRFTRQ	02-11-2010	Draftsman		Filed	US North East	View deta	ils	
000000007	07-02-2011	Management Anal	lyst	Active	East Coast USA	View deta	ils	
000000006	04-07-2011	Payroll Clerk		Hiring In Progress		View deta	ils	
000000005	04-07-2011	Payroll Clerk		Hiring In Progress		View deta	ils	
800000008	02-11-2011	Industrial Engineer	r	Filled		View deta	ils	
000000011	01-01-2012	Accountant		Pending	West Coast USA	View deta	ils	
000000004		Carpenter		Filled		View deta	ils	
000000003		Senior Level Mana	ager	Filled	East Coast USA	View deta	ils	
000000010		Management Anal	lyst	Pending		View deta	ils	
000000002		Accountant		Filled	East Coast USA	View deta	ils	
000000009		Accountant		Hiring In Progress		View deta	ils	
000000001		Photographers		Filed	Northwest USA	View deta	ils	
4							۱. ۲	
Applicants Search Qualified Applicants								
Applicant ID	First Name	Last Name	% of Required	Qualifications	% of Desired Qualifications		Action	
1044226	West	Jeremy		100.0%		100.0%		

This page allows user to view the list of requisition with the details, date, description, status and hiring office.

There is an option on this page to search for the specific requisition. User has to enter either Requisition ID, Date Created or/and Job Classification and click on [**Search**].

Requisitions								
Requisition ID	Date Crea	ated On 👻	Job Classification Payroll Clerk		Search			
Requisition ID	Date	Description	Status	Hiring Office	Action			
000000006	04-07-2011	Payroll Clerk	Hiring In Progress		View details			
000000005	04-07-2011	Payroll Clerk	Hiring In Progress		View details			

When user clicks on [**View Details**] button, the new pop up window opens with tabs: General, Desired Attributes and Actions.
🕙 Mozilla Firefox			
http://test4v10.cmic	.ca:7785/cmictestv10x/HrReqAppl/showHRRequisition.do	?reqOraseq=2507064&runA	sPopup=true 🖒
Edit Close			
General	Desired Attributes		Actions
Requisition ID	00000006	Date	04-07-2011
Requested By	Suzette Watson	Proposed Hire Date	15-07-2011
Job Classification	Payroll Clerk	Status	Hiring In Progress
Position Name	Payroll Clerk 11	Туре	Addition 🗹 Replacement 🗆
Hiring Office		Recruiter	FH FH
Requisition Name	Payroll Clerk 11	Full Time 🗹 Part Time 🗆	Temporary
Job Description			
Responsibilities			
Notes			
Done			
L			

In this window, user can edit the requisition by clicking on [Edit] button, then [Save].

Mozilla Firefox				and the state of the state of	
http://test4v10.cmic	ca:7785/cmictestv10x/HrReqApp	l/showHRRequisition.do)		
Save Cancel					
General		Desired Attributes		Actions	
Requisition ID	000000006		Date	04-07-2011	
Requested By	Suzette Watson		Proposed Hire Date	15-07-2011	
Job Classification	Payroll Clerk	_	Status	Hiring In Progress 💌	
Position Name	Payroll Clerk 11		Туре	Addition C Replacement	
Hiring Office		_	Recruiter	FH	=
Requisition Name	Payroll Clerk 11		Full Time Part Time	Temporary	
Job Description					
Responsibilities					
Done					

Requisition page also used to search for applicants that have attributes that match the requisition attributes entered.

First, a user searches for the requisition that he wants to fill out and clicks [Search Qualified Applicants].

			Requisitions		
Requisition ID		Date Created On 👻	Job Classification MECH ENG	×	Search
Requisition ID	Date	Description	Status	Hiring Office	Action
SWC-SURV	01-01-2010	Surveyors	Pending	US North East	View details
SWC-PMRQ	01-11-2010	Project Manager	Hiring In Progress	Midwest USE	View details
SWC-DRFTRQ	02-11-2010	Draftsman	Filled	US North East	View details
000000007	07-02-2011	Management Analyst	Active	East Coast USA	View details
000000006	04-07-2011	Payroll Clerk	Hiring In Progress		View details
000000005	04-07-2011	Payroll Clerk	Hiring In Progress		View details
000000008	02-11-2011	Industrial Engineer	Filled		View details
000000011	01-01-2012	Accountant	Pending	West Coast USA	View details
000000004		Carpenter	Filled		View details
000000003		Senior Level Manager	Filled	East Coast USA	View details
000000010		Management Analyst	Pending		View details
000000002		Accountant	Filled	East Coast USA	View details
000000009		Accountant	Hiring In Progress		View details
000000001		Photographers	Filed	Northwest USA	View details
*					4
		Applicants			Search Qualified Applicants
Applicant ID	First Name	Last Name % of Req	quired Qualifications	% of Desired Qualifications	Action
No qualified applicant found					

☆
tions
Accept

In the new pop up window that opens, users can set up the criteria of minimum and maximum percent of required qualifications, then click [Accept].

		Search Qualified App	olicants	i				
ctive After	ctive After Minimum % of Required Qualifications 90 Minimum % of Desired Qu							
				Se	earch A	ссер		
First Name	Last Name	% of Required Qualifications	% of	Desired Qualifications	Sele	ct		
John	Davis	100.0%		100.0%				
Austin	Jane	100.0%		100.0%				
Zohreh	Allameh	100.0%		100.0%				
ЈОНИ	SMITH	100.0%		100.0%				
RR	RV	100.0%		100.0%				
loe	Cavali	100.0%		100.0%				
Dallas	McLean	100.0%		100.0%				
Kate	Smith	100.0%		100.0%				

From this list of applicants, users can choose the applicants that suit employer's criteria.

Position Applicants

1000		Traine -		-
1000	President			
2000	Senior Project Manager			
20011	Site Supervisor			
20012	Site Supervisor			
сто	сто			
PRJMGR	Project Manager			
PRJLDR	Project Leader			
20021	Project Manager DES-2			
SBPOS01	President-CEO			
SBPOS02	My Right Hand			
SCRR10	Customer Service Representative			
PY-001	Payroll Administrator			
NACCT	Novice Accountant			
JSYS	Junior System Administrator			
CLERK	Junior Time Keeping Clerk			
RFPOS	Roofer			
CLERKSS	PCLRK			
P-ADASST	Project Admin Assistant			
PSS-SURV	Surveyor Position			
PSS-DRYML	Drywaller Position			
SS-DES-P	Designer SS			
AD001	Admin Assistant			
6ACARPFMD1	Carpentry Foreman (FL - 6A - 01)			-
	-	Amplicanta		
Ann lineach d		Applicants	L and Marga	
Appicant #		Prist Name	Last Name	
david@cmic.ca		Russel	Drayton	
rreugenieten		rreu Mehoan	Rugers	
maneer igmaneer it.		maneen .	Jaran	
presignation		Peter	President	

The Position Applicants screen displays a list of positions and the applicants that have applied to those positions.

Applicant Pipeline Report

		Риш керо
	Appli	icant Pipeline Report Parameters
Show Detailed Notes	Hiring Office Name	Select Hiring Offices To Run Report 🗖 Select All
EC	East Coast USA	
MIDWES	Midwest USE	V
NORTHW	Northwest USA	
SOUTH	South USA	
USNE	US North East	
WC	West Coast USA	

The Applicant Pipeline Report displays the actions (excluding the initial action of "Applied") on an applicant's application where the requisition has a hiring office specified.

Workforce Planning

Resource Scheduling

				F	Refresh Create New Schedule	Preferences
		List of Schedules				
Schedule Code	Schedule Name	Description	From Ver. #	From Ver. Code	From Ver. Name	Actions
DEFAULT	Initial Default					× 🖾 🗙
SM-SCHED	SM Company Schedule	schedule to track activities for this company				× 🖾 🗙
SM-SCHED2	SUS Schedule	SUS Schedule for all projects and contacts on projects				* 🖾 🗙
SW-DEFAULT	DEFAULT	Schedule for all activities for company SWC				× 🖾 🗙
TEST1	Test 1 Schedule	Schedule test 1				× 🖾 🗙
V10-X-007	Sample Resource Schedule	This is a sample of data for the Resource Scheduling Screen	1	V10-X-007B	Revised Scheduling	> 🖾 🗙

This page allows users to schedule and plan the workforce for different projects. There is an option to create a new schedule by clicking [**Create New Schedule**], in the top-right corner. Enter Schedule Code, Schedule Name and Description and click [**Save**].

								Check Spelling Refres	sh Save Cancel	
Schedule Details										
		Schedule Code		Schedule Name						
		Description				*				
				List of Schedules						
Schedule Code	Schedule Name		De	scription		From Ver. #	From Ver. Code	From Ver. Name	Actions	
DEFAULT	Initial Default								× 🖾 🗙	
SM-SCHED	SM Company Schedule	schedule to track	activities for this company						* 🖾 🗙	
SM-SCHED2	SUS Schedule	SUS Schedule fo	r all projects and contacts on p	rojects					× 🖾 🗙	
SW-DEFAULT	DEFAULT	Schedule for all a	ctivities for company SWC						× 🖾 🗙	
TEST1	Test 1 Schedule	Schedule test 1							* 🖾 🗙	
V10-X-007	Sample Resource Schedule	This is a sample	of data for the Resource Schee	duling Screen		1	V10-X-007B	Revised Scheduling	× 🖾 🗙	

When the [**Preferences**] button is clicked, a new window opens, which allows selecting Default View, Default Scale, and Default Project from the drop down menu.

	Save Close
belaut View -	
veraut Scale 👻	
rfaut Project	

Print Report

Employee Field Tracking

HCM Manager	Add/Remove menu items from the	e SM_MNGR Role			_
arch Go		Select All	Unselect All	Update B	Зас
HCM Manager	Menu Item	Granted			
Position Control	Position Control	~			
Hiring Requisitions	Job Classifications	R			
Applicant Management	Positions				
Resource Scheduling	Protition Exception Provide				
Training	Position Exception Reports				
Performance Management	Organizational Chart				
Compensation Management	Hiring Requisitions				
User-Defined Logs	Requisitions	•			
	Requisition Activity	2			
User Maintenance	Requisition Status Report	2			
	Pecruiter Pequisition Activity				
User Access	A self-seet Massagement				
	Applicant Management				
	Applicant Self-Service				
	Applicants	V			
	Hired Applicants	~			
	Applications	~			
	Applicant Information	R			
		2			
	Desvielling				
	Requisitions	₩			
	Position Applicants	v			
	Applicant Pipeline Report	V			
	Workforce Planning	~			
	Resource Scheduling	V			
	Employee Field Tracking		1		
	Training	L L			

This menu item facilitates the transfer of employees between jobs. In addition to transferring multiple employees between jobs, the information processed within the screen adds records/entries to the Project History screen and related project tables.

CM#C												Glenda Stin	pson's Profile Home
Human Capital Ma	inagement												
	Search Criteria							Emplo					
ncw wanager	Search							cripio	yees				Sava
Search Go	Search											1	Save
E CM Manager	Working Hitter	Select	Employee	First	Last	Middle	Trade Phone#	Current	Job	City St	art Estimated End	Actual End	Comment Status
Position Control	C Working C Not Working C Terminated		110.	Humo	Hume	inter		Field Tr	anefer		bute	Duto	
Applicant Management	C Working + Not Working C Not Working + Not Hidden							TIONA TH					Transfor
Workforce Planning	Job Filter			_									Transfer
Resource Scheduling	Job	New	Job					Start D	ate		Estimated Er	nd Date	
Employee Field Tracking	City of Job	Comme	ents										
Performance Management	Job												
E Compensation Management	Department												
User-Defined Logs	Include Closed Job												
E Security	Employee Filter												
in a coostily	Name												
	Gender 🗌 Mala 🗌 Famala												
	City of												
	Residence												
	Union												
	Company												
	Field/Office												
	Craft Filter												
	Trade												
	Skills												
	Wiring Apprentice												
	Cabing												
	Crane Operator												
	Danuali Muddina and Disabati												
	Electricity and Pasterin												
													-

Searching for Employees

Four Search Criteria sections (Working Filter, Job Filter, Employee Filter, and Craft Filter) are made available to the user, and can be used in combination to select eligible employees. The user can also type

in parts of a string of characters to search on in each field. Below is a description of the various filter parameters within each search criteria section.

Working Filter

Working = Employees currently assigned to jobs

Not Working = Employees not assigned to Jobs (regardless of status)

Terminated = Terminated employees (but eligible for re-hire)

Working and Not Working = Employees assigned to jobs and employees not assigned to job

Not Working and Not Hidden (Hidden = inactive) = Employees not assigned to jobs and are Active.

Job Filter

Job = Valid Job code

City = City Code from project attached to job or sub-job Job department = Valid department code from job company

Closed Jobs = checkbox to 'include closed jobs'

Employee Filter

Name = this is either First Name OR Last Name City of Residence = search against Employee Mailing Address – Lines 2, 3 Union = Valid Union Code Company Code = valid company code based on security access Field/Office = to be taken from new field in Employee Profile.

Craft Filter

Trade = valid trade code from list of values

Skill = valid skill code from list of values

Select the appropriate filters and click [Search]. The Employees section will be populated with the records that match the criteria:

Hum	an Capital	Ma	nagement									Glenda	Stimpson's	Profile Home
	HCM Manager	~	Search Criteria					Er	nploye	es				
Search	(30	Search											Save
E CM Manager			Working Filter	Selec	Employee No.	First Name	Last Name	Middle	Trade	Phone#	Current	Job Description	City	Start Date
Hiring Requisition	ons		O Working O Not Working O Terminated		1044244	-	Farmatas	Fred	4044	(242) 555 0000	300			
🗈 🦲 Applicant Mana	agement		Working + Not Working C Not Working + Not Hidden	냳	1044214	Jerenny	Porrester	Fieu	1011	(212) 000-0000				
Workforce Planning Morkforce Planning Transig Transig Performance Management Compensation Management Compensation Management			Job Filter		1044222	Lantern	Green		1010					
			Job	뜨	ALT-SAL-MASTRUP	Steen	Mastrup		312					
			City of Job		ALT-SAL-MAUGER	Ivan	Mauger		164	243-357-4589				
			Job Department		ALT-SAL-SIMMONS	Malcolm	Simmons		1628	234-451-4590				
			Include Closed Job	nclude Closed Job			Ashby		372	325-358-3898				
File Maintenance			Employee Filter		ALT-WK-AUTRY	Scott	Autry		1412					
E Security			Name		ALT-WK-BRIGGS	Barry	Briggs		TRUC	323-456-3487				
			Gender 🗆 Mala 🗖 Femala		ALT-WK-JESSUP	Dave	Jessup		TRUC					
			City of		ALT-WK-LOUIS	John	Louis		6432	234-456-4689				
			Residence	ALT-WK-NEVADA	Bob	Nevada		372						
				ALT-WK-PENHALL	Bruce	Penhall		372						
			Company		ALT-WK-SAL-CRUMP	Phil	Crump		372					
			Field/Office		ALT-WK-SHIRRA	Mitch	Shirra		372					
			Craft Filter		JAK001	Jodi	Knickle		1412					
			Trade		JD-EL-PRESIDENTE	BIG BOSS	MCGEE		100					
			Skils		JD-SAL-INGER	SAL	INGER		1001	156165162				
			Cables		JD00-SAL-TEST	Barney	Stinson		1634					
			Cabing		PY-001	Salary emp	PY		100					
			Truck Driver		PYBW-001	BW SALARY	PY		100					
			Drywall, Mudding and Plasterin	Ē	PYMN-001	001 SALARY	PYMN		100					
			Electrician		SM-001-ZZ	Marlene	Miller		142					
			Forkift	E	SM-EMP01	Amanda	Matthews		142		1154965	11.54965 - T& M Allowances		
			Glazier	E	SM-EMP02-SAL	Merrick	Wilson		1611					
			Groundskeeper	E	SM-EMP03-SAL	karl	Meadows		1412		BASIC	Basic job		2013-01-01 -
		_	HVAC Installer				1				1	· · ·		

Transferring Employees to another Job



Select the Employee(s). Enter the particulars in the Field Transfer section, and click [**Transfer**]. After the Transfer, if you search on the new job, the employee record is located there:

Human Capital M	lar	agement															Glenc	a Stimps	on's Profi	le <u>Home</u>
C HCM Manager	^	Sear	ch Criteria									Employ	rees							A
Search Go			Search																	Save
HCM Manager Position Control		Working Filter	C Not Working C Terminated	Selec	Employee No.	First Name	Last Name	Middle Initial	Trade	Phone#	Current Job		Job De	scription	City Sta	t Estimate	ed End Date	Actual End Date	Comment	Status
🕀 🎦 Hiring Requisitions 🖶 🎦 Applicant Management 🚍 🎦 Workforce Planning		Working + Not Working Job Filter	C Not Working + Not Hidden		SM-EMP03-SAL SUS-EMP01	karl Glenda	Meadows Stimpson		1412 142		SUS-JOB-2 SUS-JOB-2	FIRST JO	B FOR TH	HS COMPANY - UF HS COMPANY - UF		301212				A
Resource Scheduling Employee Field Tracking		Job SUS-JOB-2 City of Job	FIRST JOB FOR THIS COM									Field Tra	nsfer						Trar	nsfer
Performance Management Compensation Management User-Defined Logs		Job Department	•	l Co	lew Job SUS-JOE	-2 i transfe	 FIRST JO from STDJ 	B FOR OB to S	THIS C SUS-JO	ом 18-2		Start Da	ite			Estimated E	nd Date			
a of the Maintenance a of Security		Employee Filter Name Gender 🗌 Male 🗐 Fe	male																	

The Employee Profile – **Project History** tab is also updated:

Action Edit	Block Eield Re	ecord Query Uti , 🔌 📾 🖂	lity Help Window ☞ ♣ ͡ Source Pa	+ ± € £.		2 3 3 3 /0
Payroll -	EUN VEUN C	- 💌 - El 🕬	intenance			
Employee	leteile	ipioyee i tome me	Internance			
cmployee	Details					User Extensions +
Employ	ee SM-EMP03-SAL	Meadov	vs karl		Copy Employee	User Extension1
Personal	Company Rates/	Address Ta	× HR Info HCM Not	es Exclu Security	Project Dispa	User Extension2
	·			· · ·		User Extension3
				Ľ	Project History	User Extension4
Comp	Project	Est. Start Dat	e Est. End Date A	ctual Start Date Actual	End Date Assigned	User Extension5
505		270602012			──┤¦_ ┤	User Extension6
						User Extension7
						More Extensions
						Related Screens +
						JC Main Menu
						Related Screen 2
						Related Screen 3
						Related Screen 4
Proiec	t Name Project 1 - SI	US				Related Screen 5
,						Related Screen 6
						Related Screen 7
						More Related

Training

Courses and Modules

Course Maintenan	се					Check Spelling Save Cancel
🔹 HCM Manager 🔺				Course		A
Search Go	Code	HSCOURSE	Name [®] Health and Safety	,		
🖃 🗁 HCM Manager	Description	Health and Safety Course				
Position Control Hiring Requisitions	Vendor		Туре	•	Trainer ALEX GIMELSTEIN	Self Service
🕀 🍋 Applicant Management	Training Team					
Workforce Planning Training				Module		
Courses and Modules					+	
Health and Safety						
Iraining Nominations My Class Enrollment						
Class Enrollment Log						
Course Enrollment Log						
Review Self-Service Class Enrollment						
Training Records						
Trainer Evaluations						
Trainer Evaluations Review						
Compensation Management						
- Compensation management						
E 🦲 File Maintenance						
🗄 🎦 Security						
						*
ē1						🔄 Internet

This program allows for the definition of Courses and Modules within courses. Courses can be in-house or external. The first step is to create the course, then the modules within the course.

Enter the Course Code and Name and a description of the course. If the course is offered by an external source, select the vendor. The type of course is a predefined list of course types. Enter the name of the trainer if known. When complete [**Save**] the record. If the Self-Service flag is checked, this course will be available for selection in the Course Enrollment screen if they intend to take the course.

To add Modules to a course [Edit] the Course and use the 🛉 in the Module section of the screen. This will open up an area to create the Module.

Course Maintenance		Check Spelling Save Cancel
🔹 HCM Manager 🗾	Course	
Search Go Code	HSCOURSE Name Health and Safety	
E CM Manager Description	n Health and Safety Course	
Orbition Control Vende	r Type Other	Trainer ALEX GIMELSTEIN A Self Service 🔽
Applicant Management Training Tea Workforce Planning	n 🔼	
	Module	
Cod	* HS-101J Name HS for the Job Site	Description Health and Safety rules and regulations as they apply to the job s
Classes Intern Training Nominations	al 🔽 Vendor	Web Link Prerequisite Cour
	Duration 2 Days	Credit Points Frequen
- My Course Enrollment Credit Hou	s 16 Cost	Location Head Office Train
Course Enrollment Log	m 🔼	
Cod Training Records Cod	* HS-102J Name Hazard Identification	Description Hazard Identification, Assessment and Control Methods
Trainer Evaluations Intern	al 🗸 Vendor	Web Link Prerequisite Cour
Compensation Management Reimbursation	Duration 1 Days	Credit Points Frequen
Credit Hou	s 8 Cost	Location Head Office Train
Training Tea	m	
_		*

- Enter a unique code for this module along with a short name and description of the module.
- Indicate if the course is an internal course or else select the associated Vendor.
- Enter an associated Web Link if applicable and any pre-requisites. These pre-requisites can be already defined Courses and Modules or free form text.
- Enter the usual location and duration of the Module.
- The Credit Hours and Points, Frequency, Cost and Reimbursable are all reference fields that can be utilized as required.
- The Trainer will default from the Trainer of the associated course.

Once done, use the $\frac{1}{2}$ to add another Module or the [Save] button to save all the data entered.

Search Course Heath and Safety Module HS for the Job Site Position Control Position Exception Reports Organizational Chart Position Activity Regulation	Code Completion Date Duration Sett Service Traine
Image: Name [®] Job Site HS Start Date 01 10 2008 Image: Image: Operation Control Status ImpRog Status ImpRog ImpRog <t< th=""><th>Completion Date Duration Self Service Traine</th></t<>	Completion Date Duration Self Service Traine
Position Scription Reports Organizational Chart Positions Position Scription Reports Organizational Chart Positions Requisition Activity Requisition Activity Requisition Activity Requisition Activity	Duration Self Service Traine
Obc Classifications O	Self Service Traine
Position Exception Reports Position Exception Reports Organizational Chart Positions Requisitions Requisitions Requisitions Requisitions Requisitions Requisitions Report R	Traine
Organizational Chart Organizational C	Traine
Hring Requisitions Location Head Office Location Head Office Requisition Activity Requisition Status Report	
- Requisition Status Report	
E C Applicant Management	
Applicant Self-Service	
Applicants	
🕀 🗀 Hired Applicants	
Applications (33, 4)	
Applicant Pipeline Report	
🖻 🗁 Workforce Planning	
Resource Scheduling	
Heatin and Safety	
- Training Nominations	
- Class Enrollment	
Class Enrolment on	
Course Enrollment Log	
C Review Self-Service Class Enrollment	
- Retrain Dates	
Retrain Dates Records Training Records	
Certain Dates Certain Dates Training Records Trainer Evaluations	

Class Maintenance and Scheduling

Classes can be created for a Course or a Course/Module combination.

- Select the required course for the list of values.
- Select the required module from the List of Values.
- Enter the class code, short name and start date and select the correct status.
- If the completion date is not entered, it will be updated based on the duration of the module for that course.
- The Cost will default from the Cost of the module.
- The Class Description will have defaulted from the Module selected, and the Location and Trainer will have defaulted from the Course definition, but these values can be changed if required.
- Enter the Retrain On date. If the Self-Service flag is checked, the class will be available for selection in the Class Enrollment screen and the user can apply to take the class.

Once this is all complete [Save] the info.

Class Enrollment

There are multiple ways to enroll an employee in a class.

1) Any employee can be added to a class directly in the 'Class' screen.

- 2) A manager can nominate any direct report employee via the 'Training Nominations' screen.
- 3) An employee can enroll themselves via the 'Class Enrollment' screen.

Add Employees Directly to a Class

Maintain And Sch	nedule	Classes							Save C	Cancel		
💠 HCM Manager	▲ 			Class								
Search Go	Course	Health and Safety	Module	HS for the Job Site		-		Code	062-HS101	1J		
⊟- 🗁 HCM Manager	Name	Job Site HS	Start Date	01 10 2008 🕎			c	ompletion Date	01 12	200		
Position Control Job Classifications	Statu	s INPROG 💌	Start Time	09 💌 : 00 💌				Duration	2 Days			
	Cos	st O	Retrain Or	01 10 2009 🕎				Self Service	v			
Position Exception Reports Organizational Chart	Descriptio	n Health and Safety rules and re	equilations as they apply to the	ioh site				Trainer	Alex Gimel	Isteir		
Hiring Requisitions	Locatio	anpuori meaiun ana Sanety nues ana regulauons as mey apply to me job Site.										
Requisitions	Localio											
Requisition Activity				Attendees					<u>Ac</u>	dd		
Requisition Status Report	Employ	ee Code ZZ-200	Employee Name Andy And	ersen	Nominated By		Enrolle	d By		×		
Applicant Self-Service	Enrollm	ent Date 12 18 2007 🖳	Start Date 01 10	2008 🖳	Completion Date 01	12 2008 🕎	Gi	ade				
		Status PRESENT	Start Time 09 💌	00 🔻	Retrain On 01	10 2009 🕎	Written Ra	ating				
🗀 Hired Applicants												
- D Applications (35, 4)	Per	t. Rating	Memo					Cost				
Application Actions										-		
Applicant Pipeline Report												
Training												
Courses and Modules												
Health and Safety												
Class Eproliment												
Class Eproliment Log												
Course Enrollment												
Trainer Evaluations												
Trainer Evaluations Review												
- Performance Management												
Job Classification Performance Stand	-									$\mathbf{\nabla}$		
	•											

- Open the required class from the class log
- [Edit] the class
- Use the <u>Add</u> link on the 'Attendees' bar

http://test2005.cmic.ca:7779 - Employee LOV - Microsoft Internet Explorer													
	Find: % Go Close Accept Selected << Prev Set												
Company Code	Jol	o Class Code	Jo	b Family	Jo	b Classification	Hire Dat	e Before					
				-					Apply Filter				
Employee No	First Name	Last Name	Job Class Code	Job Family	Company Code	Company	Job Classification	Hire Date	C Select				
4PWORK4SPAY	4SPaying	4PW/orking	CM01	Const. Managers	4S	Four Corner TEST-2004-B (4S)	Construction Managers	2001-03-24					
4SWORK4PPAY	4PPaying	4SWorking	CM01	Const. Managers	4P	TEST2005 Company 4P	Construction Managers	2001-03-24					
ADJUST	John	Adjust	1234	Apprentice	SS	SS & Construction Company	Hod Acrrier Apprentice	2006-01-01					
JOJAH	George	Ah	CM01	Const. Managers	MP	MurzPTF	Construction Managers	2005-01-01					
SSEMPOH1	Jen	Alliance	ADMN	SYSTEMADMIN	SS	SS & Construction Company	System Administrator	2006-01-01					
4P2004-15A	Greg	Alvin	GL01	General Labor	4P	TEST2005 Company 4P	General Labor - Skilled	2006-02-02					
ZZ-200	Andy	Andersen	ZZ20	Electrician	ZZ	CMiC ZZ Test Company	Electrician	1978-01-01					
4S-WK0003H	Neo	Anderson	GL01	General Labor	4S	Four Corner TEST-2004-B (4S)	General Labor - Skilled	2001-03-04					
4PHR-10078WK	Neo	Anderson	EL02	Electrician	4P	TEST2005 Company 4P	Electrician	2003-01-25					
4PHR-10065WK	Richard	Anderson	CO02	Cement	4P	TEST2005 Company 4P	Cement Masons	2002-12-31					
4P-CO-LONGNUMBER	Josephine	Anderson-Walker	GL01	General Labor	4P	TEST2005 Company 4P	General Labor - Skilled	2003-02-10					
4PSA-P0004WK	Tyler	Andronki	SS01	Site Supervisor	4P	TEST2005 Company 4P	Site Supervisors	1992-07-06					
ZZ-202	George	Applebaum	CP01	Mstr Carpenter	ZZ	CMiC ZZ Test Company	Master Carpenter	2004-01-01					
5PH-FL013-WK	HR	ApplicantSKILLS	GL01	General Labor	4P	TEST2005 Company 4P	General Labor - Skilled	2003-02-15					
4PHR-90069VVK	Michaelangelo	Arlington-Valjon	GL01	General Labor	4P	TEST2005 Company 4P	General Labor - Skilled	2002-05-02					
🔄 Done								Internet					

This will open a multi select list of all employees, select the required employees then [Accept] your selection.

This will assign all the selected employees to the class.

Nominate an Employee

Training Nominati	ons						_				
💠 HCM Manager 🔺	555666			Fred Powell							
Search	ZZ-202			George Applebaum							
	98789789	7897907		Ira Steel							
🖃 🗁 HCM Manager	BENEFIT			James Benefit							
E Control	LAYOFF			Janet Layoff							
— Job Classifications	SS-HRHC1			Janet Parsons							
-C Positions	SSEMPOH	1		Jen Alliance							
Position Exception Reports	4444444			joe brown							
	ADILIST			John Adjust							
Hiring Requisitions				Class Details							
- Carlo Requisitions	Code	Course Name	Class Description	on Module Name	Nomination Date	Start Date	Completion Date	Location	Delete		
				No	Records Found						
Requisition Status Report											
- pplicant Management											
Applicant Sen-Service											
Shired Applicants											
Applications (35.4)											
Application Actions											
Requisitions	1										
Applicant Pipeline Report											
- Convertion Planning											
Resource Scheduling											
- Training											
Courses and Modules											
- Classes											
Class Enrollment											
-Class Enrollment Log											
Course Enrollment											
-Course Enrollment Log											
- Review Self-Service Class Enrollment											
- Carlo Retrain Dates											
Training Records											
Trainer Evaluations											
Irainer Evaluations Review											
- on Classification Performance Stand											
Sendovee Performance Plane	1										
									-		

- Open the Training Nominations screen.
- This displays a list of all employees that the user has access to.
- Select the employee.
- Use the <u>New</u> link on the 'Class Details' bar

🚰 http://test2005.cmic.ca:7779 - Select Courses - Microsoft Internet Explorer												
						Save Cancel						
Code	Course	Module	Class	Start Date	Completion Date	Locati						
CPR ADVND	CPR Training	CPR Life Saving	Advanced CPR									
CPR001	CPR Training	Basic CPR Skills	Basic CPR	Feb-14-2006	Feb-15-2006	Main Offic						
CPR BASIC	CPR Training	Basic CPR Skills	Basic CPR	Mar-16-2006	Mar-05-2003	Training						
WWW	CPR Training	Basic CPR Skills	Basic CPR									
CON-CL2	Construction Course	Intro to Construction	CON-INT-2	Apr-15-2008	Apr-30-2008	Trainig Room 101						
CONCSSS	Welding	Conclusion to Welding	CONCWLD	Apr-02-2008	Apr-06-2008	Head Office						
FORKLIFT	Forklift Certification	Forklift Certification	Forklift Cert.	May-01-2005	May-06-2005	Location i						
WELD3CL1	Welding	Frame Welding	Frame Welding	Jan-17-2008	Jan-22-2008							
JUN14HR1	HR Training Course	HR Training Intro	HR 101 JUNE 2006	Jun-14-2006	Jun-14-2006	Main Offic						
RFINT1	Roofing Course	Roof 201	Intermediate CL1	Nov-02-2007	Nov-16-2007	Location 201A						
ど Done						📄 📄 👘 🚱 Internet 🧷						

This will open a multi select list of all classes, select the required class(s) and then [Accept] your selection.

This will assign all the selected classes to the employee. The employee will be nominated for the class for enrollment.

NOTE: This screen can also be switched to run by classes instead of employees by using the <u>Show</u> Classes link on the Employees bar.

Self Enrollment

Class Enrollment							Add New
Courses and Modules			Assigned Classes				A
	Course Name	Module Name	Class Name	Start Date	Status	By	Action
Health and Safety	Construction Course	Intro to Construction	Introductiry Course on Construction	01-Apr- 2008	Enrolled	Suzette Watson	
Class Enrollment	Forklift Certification	Forklift Certification	Course starts at beginner and ends with certification for all types of forklift and hydraulic equipm	01-May- 2005	Enrolled	Suzette Watson	
Course Enrollment	HR Training Course	HR Training Intro	Introduction to HR	14-Jun- 2006	Applied	Suzette Watson	×
Review Self-Service Class Enrollment							
Training Records							
Trainer Evaluations							
Performance Management							
Job Classification Performance Stand							
Discrete Dis							
California Interim Evaluations							
Annual Evaluations							
😑 🗁 Compensation Management							
Salary Surveys							
- Contract							
E C File Maintenance							
Application Questions							
Application Status							
Area of Interest							
Attendee status							
Close Statue							
Class Sidius							
Cornorate Performance Standards							
Degrees							
- Education							
Frequency Status							
Geographical Area							
Hiring Actions							
HR Regions							
							*

- Open the Class Enrollment screen
- This displays a list of all classes the current user has ever been enrolled in.
- Use the [Add] button to display a list of classes not yet taken
- This displays a multi select list of values, when the required classes have been selected use the **[Update]** button to enroll into the selected classes.

Class Enrollment Log

This log displays a list of all classes that have been applied for via Class Enrollment, nominated via Nominations or enrolled in.

My Course Enrollment

The user can apply for a course in the My Course Enrollment screen. A list of courses that do not have classes assigned is provided when clicking on Add and the user can select the courses he intends to take.

Course Enrollment Log

This log displays a list of all courses that have been applied for via My Course Enrollment.

Review Self-Service Class Enrollment

Human Capital Ma	nagement						Lu Show Filter Send	dmila Goldstein's Profile Home To Spreadsheet Enter Query
💠 🗉 🕘 HCM Manager 🔺				Review Self-Servi	ice Enrollment			
Same	H Class Code	Class Short Description	Class Description	Trainer Name	Course Name	Module Name	Total Nominations	Total Enrolments
Search	APR.2013		Microsoft Excel module 01	Suzette Watson	Microsoft Excel 2010	MS Excel -01	1	2
🖃 🗁 HCM Manager	DEC2012 DEC2012		Microsoft Excel module 01	Suzette Watson	Microsoft Excel 2010	MS Excel -01	0	4
Position Control	JAN2013		Microsoft Excel module 01		Microsoft Excel 2010	MS Excel -01	0	0
Hiring Requisitions	ZZ-SAFETY	Basic Safety	Basic Safety		Company Safety Training	Basic Safety	0	0
Applicant Management	Total (4 rows)							
Workforce Planning								
🖹 🦳 Training								
- Courses and Modules								
- Classes								
Iraning Nominations								
My Class Enrolment								
Class Enrolment Log								
Course Enrolment								
Devices Call Capital Class Capability								
Review Self-Service Class Enrollmen								
Training Records								
Training Records								
Trainer Evaluations Deview								
Pending DL Certification Log								
Performance Management								
Compensation Management								
User-Defined Loos								
Ele Maintenance								
R C Security								

This screen allows user to review Self Service class enrollment.

When user clicks on Class code, the new window opens with class details and the list of the employees who have been nominated or enrolled to this specific class.

			Class							
Course	Microsoft Ex	kcel 2010	Module MS Excel-01		Code APR.2013					
Name			Start Date 20-04-2013	Compl	Completion Date 21-04-2013					
Status	Status SCHEDULE		Trainer Suzette Watson		Duration 1 Days					
Cost \$20.00			Retrain On							
Description MS Excel-01										
Location	Small Board	room								
			Attendees							
Employee Code		Employee Name	Nominated By	Enrolled By	Enrollment Date	Enroll				
SWC-WK-HR1		Annabelle Lewis	Ludmila Goldstein							
LG-WK-SAL1	LG-WK-SAL1 Robinson Cruzo			Ludmila Goldstein	2013-04-10	V				
ABORIGINAL		Employee Aboriginal		Ludmila Goldstein	2013-04-10	V				

By checking the box Enroll, user can Enroll on not to Enroll employees from the list and confirm the action by clicking [**Save**].

Retrain Dates

Training Records

Training Records								Ludmila Goldst	ein's Profile Home Records By Class
								l.	,,
✿므문 HCM Manager ▲					Trainees				*
Search Go	Trainee Nam	e	Search						
		Trainee Name	Trainee's Employee Numb	ber					
B CM Manager	Employee Aboriginal		ABORIGINAL						
Position Control	Ferris Copeland		SWC-WK-SAL4						
Applicant Management	John Bronx		SWC-WK-SAL5						
Applicant Management	Robinson Cruzo		LG-WK-SAL1						
Training	Tom Brady		SWC-WK-SAL10						
Courses and Modules	Tom Cooper		SWQ-WK-HR3						
Classes									
Training Nominations									
Class Enrollment Log									
My Course Enrolment									
- Course Enrollment Log									
- Review Self-Service Class Enrollmen									
- Carlo Retrain Dates									
- Training Records									
Trainer Evaluations Review					Classes				^
Pending DL Certification Log	Class Code	Class Name		Course Name	Start Date	End Date	Trainer Name	Status	Rating
Performance Management	DEC2012	MS Excel -01	Microsoft E	xcel 2010	17-12-2012	17-12-2012	Suzette Watson	ENROLLED	
Compensation Management									
Diser-Defined Logs									

This program allows user to view training records of employees. When user clicks on Trainee Name in the lower block he can see Classes details for this Trainee.

When user clicks on the Class Name in the lower block, the new window opens with details of the Class and employees who attended this class.

			Class									
Course	Microsoft Excel 2010		Module MS	S Excel -01		Class Code	DEC2012					
Class Name	MS Excel -01		Start Date 17-	Start Date 17-12-2012 Completion Date 17-12-2			17-12-2012	-12-2012				
Status	Schedule		Start Time 01	:00 AM		Duration	1 Days					
Cost	\$0.00		Retrain On			Self Service	7					
Location	CMIC					Trainer	Suzette Watson					
Class Description	Microsoft Excel module 01											
Attendees												
Employee Code	SWC-WK-SAL4	Employee Name	Ferris Copeland		Nominated	iy	Enrolled By					
Enrolment Date	10-12-2012	Start Date	17-12-2012		Completion Da	te 17-12-2012	Grade					
Status	Enrolled	Start Time	01:00 AM		Retrain	in	Written Rating					
Perf. Rating		Memo					Cost	\$ 0.00				
Employee Code	SWQ-WK-HR3	Employee Name	Tom Cooper		Nominated	y	Enrolled By					
Enrolment Date	10-12-2012	Start Date	17-12-2012		Completion Da	te 17-12-2012	Grade					
Status	Enrolled	Start Time	01:00 AM		Retrain	n	Written Rating					
Perf. Rating		Memo					Cost	\$ 0.00				
Employee Code	SWC-WK-SAL5	Employee Name	John Bronx		Nominated	iy	Enrolled By					
Enrolment Date	10-12-2012	Start Date	17-12-2012		Completion Da	te 17-12-2012	Grade					
Status	Enrolled	Start Time	01:00 AM		Retrain	in	Written Rating					
Perf. Rating		Memo					Cost	\$ 0.00				
Employee Code	SWC-WK-SAL10	Employee Name	Tom Brady		Nominated	y	Enrolled By					
Enrolment Date	10-12-2012	Start Date	17-12-2012		Completion Da	te 17-12-2012	Grade					
Status	Enrolled	Start Time	01:00 AM		Retrain	in	Written Rating					
Perf. Rating		Memo					Cost	\$ 0.00				

On the main screen there is an option to see Training Records by Class.

				Records By Trainee Records By Class
		Classes		
Class Name	Search			
Class Name	Class Code	Trainer Name		Action
MS Excel -01	APR.2013	Suzette Watson	View details	
MS Excel -01	DEC2012	Suzette Watson	View details	
		Tringer		
Tasiana Mana	Taxia a da Caralana a Number	Trances	Chatra	Detine
Farris Constand	Trainee's Employee Number		Status	Raung
Icha Broav	SWO WK CALE		ENDOLLED	
John Dronk	STVC-VIN-SALS		ENROLLED	
Tom Brady	SWC-WK-SAL10		ENROLLED	
Iom Cooper	SWQ-WK-MR3		ENROLLED	

When user clicks on Class Name he can see list of Trainees for this specific class in the Trainee Block. There is an option to search the data by Class Name or Trainee Name on the top of the screen.

Trainer Evaluations

					Check Spelling	Save Cancel			
Trainer Evaluation									
Class Name	Managing Worksite Conditions and Equipment	Trainer Name	Peter Paulson						
	Question		Ranking	Comments					
Was the trainer knowledgeable			Select Ranking			*			
Was the course content delivered			Select Ranking			A. 			
Was the equipment up to			Select Ranking 💌			*			

This program allows user to evaluate the trainer of the class. First, a user selects a class then click [**Start Evaluation**] button in the right top corner. The new screen opens with evaluation questions.

Trainer Evaluations Review

ĸev	lew				Search Summary By Class	Summary By Trainer
		Select Trainer, Course	or Class			
1	Trainer Name	Course Name	^	Class Name	-	
	Trainer Name	Course Name	Class Code	Class Name	Class Name	
Peter Pa	ulson	Safety Construction Orientation Training	0510	Managing Worksite Conditions and Equipment		3.33
		Evaluation Questi				
#		Question	5118	Ranking	Comment	
1	Was the trainer knowledgeable about the subject matter?			3		
2	Was the course content delivered in a logical order?			3		
3	Was the equipment up to date?			4		

This program displays the Trainer Evaluation results. The Results can be sorted by Summary by Class, or Summary by Trainer.

Pending DL Certification Log

	DL Expiry Log Status												
Employee No				Empl	oyee Name	-			Statu	IS 🔺			
					Out to				Cita alta a Da		and a		
Тур	• •				Code	-			Effective Da	e On 💌	**		
License Clas	s 📃			Licen	se Number	-			Renewal Da	te On 💌			
Supervising Employe	e 🔼				State	-			Renewal Day	rs Equal			
Employee No	Name	Status	Туре	Code	Effective Date	License Class	License Number	State Code	State Name	Supervising Employee	Comments	Requalify/Renew On	Renewal Days
SWC-WK-HR1	Carrington, Nathaniel	Α	Certification	ZZ-SAFETY1	2008-04-01						RENEW IN 2011	2011-04-01	-916
SWC-WK-HR14	Bennett, Sara	A	License	PMP	2009-10-01		56894565	NY	New York			2011-10-01	-733
SWC-WK-HR13	Drummond, Jamie	Α	License	FORKLIFT	2009-07-14		55555	IL	Illinois			2012-01-01	-641
ALT-WK-AUTRY	Autry, Scott	A	License	FORKLIFT	2010-02-02	A	27975975	IL.	Illinois			2012-02-02	-609
SWC-WK-HR1	Carrington, Nathaniel	Α	License	FORKLIFT	2007-05-02		123	AL	Alabama			2012-05-02	-519
LG1-BW-SAL1	Estee, Lauder	Α	Certification	EFA	2013-01-07							2013-12-31	89
LG1-BW-SAL1	Estee, Lauder	Α	Certification	DRUG	2013-01-07							2014-06-30	270
CCC-WK-HR2	Sherman, Richard	Α	Certification	SAFETY	2013-09-14							2014-09-14	346
1044226	Jeremy, West	Α	License	FORKLIFT	2013-02-01			AK	Alaska				
LG1-BW-HR5	Austin, Jane	Α	License	PMP	2013-02-01			MB					
JCR TEST SAL	Salaried, Test	Α	License	PMP	2013-04-07			AB					
SWK-WK-HR20	Harrison, Mike	Α	License	FORKLIFT	2010-01-01			NY	New York				
ALT-WK-ASHBY	Ashby, Martin	Α	Certification	ZZ-SAFETY1	2010-01-01								
ALT-WK-ASHBY	Ashby, Martin	Α	License	FORKLIFT	2009-05-01		238998	IL.	Illinois				
74859679	Allameh, Zohreh	Α	Certification	SMI002	2013-02-01								
SWC-WK-HR5 - ASH	Simeon, Ashley	Α	Certification	DRUG	2013-07-11			IL	Illinois	SWC-WK-HR6			
SWC-WK-HR9	Feldman, Corey	Α	License	FORKLIFT	2010-01-01			FL	Florida				

This screen allows reviewing Licenses and Certifications expiry date, status, renewal dates and etc.

Performance Management

Overview of Performance Management

Performance Management starts with the definition of corporate level standards and then these are refined at the Job Classification Level, and then again at the employee level. Performance standards are split into categories, where there can then be multiple sections. Each category can be assigned a weight and a display order.

Corporate Performance Standards must be defined before Job Classification standards can be created, and likewise Job Classification Standards must have been defined before employee performance plans can be created.

Job Classification Performance Standards

Human Capital Management Show Filter Send To Spreadsheet Enter Query : --Job Classification Performance Standards Job Classifi Search Go Accountants, Auditors 🖃 🍋 HCM Manager Admin Manager Position Control
 Hiring Requisitions Administrative Ass^{*} Performance Standards for Admin Assistan Administrative Support Applicant Management
 Orkforce Planning Architect Automobile Mechanics Resource Scheduling Bat Boy Training
 Performance Management Billing Clerks Bookkeepers, Accounting Job Classification Performance Stand Employee Performance Plans Notable Incidents I Brick Masons CPR Trainer Cabinetmaker: 🛅 Interim Evaluations Annual Evaluations Carpenter Carpenter Performance Standards Carpenter's Apprentice 🗄 🛅 Compensation Management User Defined Logs Carpentry Foreman N Carpet Installers Comment field on Carpet Installe All Employee View No Security Civil Engineers N Concrete and Terrazzo Finishe 🗄 🦲 Security Crane Operators N ◀ Customer Service Rep Designers N N Drafting Occupations Intersection of the section of th Drywallers Electrical Engine Electrical Power Install/Repa N Electrician Electricians Electricians 4 Electronic Engineers Elevator Installer/Reparts Ν Engineering Teacher Excavating Equipment Ops N Furniture and Wood Finishers N General Labor Grader, Dozer, Scraper Operat Internel

Job Classification Performance Standards

This program defines the performance standards that relate to a specific Job Classification. The system will automatically create the standard as a copy of the Corporate Standard. It is then available for editing as some of the Corporate Standards may need to be changed to be more specifically related to the position and the weight of the different categories may differ between Job Classifications.

Pre-Requisites:

Mandatory: Corporate Performance Standards, Job Classifications

To create/view or edit a Job Classification Performance Standard, select a Job Classification by clicking on the linked field from the log.

If a classification does not exist already the system will display a screen similar to below:



Enter a comment about this performance standard. Then select the categories and sections that apply to this job classification. The [**Create**] button will copy those standards into the Job Classification Standards where they can then be edited. The [**Copy From Another Performance Standard**] button allows the user to copy standards from another job classification into the current one.



Performance Standards Example

It is now possible to [**Edit**] the Job Specific performance standard and change the weight of each category as required. It is not possible to remove sections or categories, the only changes allowed are to the text of each area. This helps to maintain a corporate look and ensures every position is aware of the corporate categories.

Once any required changes have been made use the [Save] button to update the data.

Employee Performance Plans

Human Capital Ma	nagement	New Edit Delete Back To Log
Image: HCM Manager Search Go	Job Bookkeepers, Accounting	Employee Ben Sign Manager Suzette Watson 🗌 Sign
🖃 🗁 HCM Manager	Comments Ben's Performance Plan Jan 4, 2008 to Jan 4, 2009	
Position Control Hiring Requisitions		View previous plan: 2008-03-252009-03-25
Applicant Management Applicant Management Applicant Management Applicant Management For Planning Training	Performance Standards for Bookkeepers, Accounting	Agreed Performance Pian and Objectives for Ben Carleton (2008-03-25 to 2009-03-25)
Performance Management Job Classification Performance Stand	Values and Individual Behaviors	20 Weight
Employee Performance Plans Ben Carleton Ben Carleton Therine Evaluations Compensation Management Ourpensation Management User-Defined Logs Security	Basic Business Conduct Displays behaviors that embody integrity, listening skills, ethical negotiation and other fair and equitable business practices, and treats others with respect. Also recongnizes the value in donating time and talent to charitable, civic and other organizations in a way that enhances the individual, supports the community and turthers the goals of Superior Construction Inc. Must wear glasses. Work Ethic Work Ethic Support for Diversity and accept additional responsibilities and assignments that develop onew skills and abilities. Support for Diversity Demonstrates understanding of the value of diversity in all its forms in the workplace and helps promed diversity in public perceptions, attitudes and concerns about diversity.	
	Learning and Growth	25 Weight
	Individual Development Pursues individual growth and developmental opportunities, including internal and external development and formal and informal training and strives to become more professionally competent.	
	Team Leadership Actively leads, coaches, mentors, and encourages team and other internal staff members in positive ways. Willingly shares knowledge and experience and provides frequent, positive, constructive, and accurate feedback. Follows the performance	Put in place some on-going team-building social activities that will encourage discourse between shifts and departments Budget and time will be allocated



Employee Performance Plans start with employees related Job Specific Performance Plan as a base. It is then possible to add specific objectives against each of the sections as applicable. Both the employee and their manager must sign off on the plan. If a change is made to the plan it must be re-signed by both the employee and the manager.

Pre-Requisites:

Mandatory: 1. Job Classification Performance Standards

- 2. Positions
- 3. Employees assigned to Positions where Job Classification Performance Standards exist

To create a plan for a new employee – select the employee from the log. The system will default the current date as the Start Date and the End Date will be one year from the Start Date. This can be edited. Enter a comment if necessary. The View Previous Plan drop-down allows the user to see other performance plans that have been created for the employee.

Enter the Agreed upon Objectives and [**Save**] when done. These objectives can be modified at any time by either party if the plan is not signed by either party. Once signed, the user must [**Un-sign**] the plan before any changes can be made.

Notable Incidents



Notable Incidents Entry

Notable Incidents are way to record important information regarding an employee. This can be comments from anyone inside or outside the organization. The comments can then be viewed during the review process.

From the Notable Incidents Log – use the [Add Incident] button to create a new Notable Incident.

- Enter the date of the incident.
- Select the employee the incident is to be recorded against
- Indicate if the Incident is Positive or Negative if applicable
- Enter the Name of who reported the incident and the details

[Save] when done.

Interim Evaluations

Human Capital Man	New Edit Delete View Notable Incidents Back To Log	
HCM Manager Image: Colored Col	Performance Plan Period: 2007-12-12 2008-12-1	12 Review date: 2008-07-11
HCM Manager Destion Control	Job Classification Drywall Foreman Employee N	Aathan Richardson Sign Manager Suzette Watson Sign
Applicant Management	Agreed Perfor	mance Plan and

Interim evaluations have been designed to allow as many interim evaluations as required during a year. Interim Evaluations allow the manager to enter observations/notes against each section of the employees plan and to rate the performance in each category between 'Outstanding' and 'Unacceptable'.

Each observation can optionally be carried forward to the Final Evaluation. To create a new review or edit a review select the employee from the log. The system will open with a screen where you can create a new review, edit the current review or review an older one.

The system will default to the latest created review. To review previously performed reviews select the review from the Review date drop down list and retrieve the review information.

To create a new review use the [New] button. The system will then prompt you as shown below:

Human Capital Man	agement			Create	Cancel	Back To Lo	g
🌣 🛛 HCM Manager 🛛 📥		Employee Perform	nance Evaluation		,		*
Search Go	Performance plan	Select performance plan 💌					
HCM Manager	Review date	07 18 2008 🕎	Comment				
Position Control Defining Requisitions							
Annicant Management							

The Review Date defaults to the current date. You may edit the dates and enter a comment regarding the review.

When done, use the [Create] button to build the interim review.

HCM Manager HCM Manager Co HCM Manager Desition Control De	Performance Standards for Drywall Foreman	Agreed Nati (2008	Performance Plan a Objectives for han Richardson -07-11 to 2009-07-1	and I 1)	Observations and E	valuations
Hiring Requisitions	Standard					0 Weight
Applicant Management Applicant Management Weight Korce Planning Difference Planning Performance Management Job Classification Performance Stand Difference Performance Plans	Appearance Does the employee meet the anticipated Appearance standards as applicable to their position?					
	Corporate Business Requirements Must be appropriate when working in various different business environments.					
Notable Incidents	Overall Evaluation for	Outstanding	Highly Effective	Effective	Needs Improvement	Unacceptable
Nathan Richardson	Standard			V		
Annual Evaluations Compensation Management Compensation Management File Maintenance Compensation Security	Corporate Standards @ 2005					0 Weight
	Presentation Employee Presentation and appearance including professionalism					
	Attendance Describe in general attendance and meeting of corporate standards for off-days and vacations.	Daily attendance vacation days all	is required. There will be te otted for the year.	n paid		
	Overall Evaluation for Corporate Standards @ 2005	Outstanding	Highly Effective	Effective ☑	Needs Improvement	Unacceptable
	Demonstrated Professional Skills					0 Weight
	Presentation Skills Ability to present information to either small or large groups.					
	Customer Interaction Ability to interact in a professional manner with customer.					
	Overall Evaluation for Demonstrated Professional Skills	Outstanding	Highly Effective	Effective 🗹	Needs Improvement	Unacceptable

Enter Observation and Evaluation notes against each objective, and for each category assign the overall evaluation rating. When done [**Save**] the evaluation.

At any point during the process it is possible to view any Notable Incidents that fall within the current plan year by using the [**View Notable Incidents**] button.

	Notable Incidents for the period between 2008-07-11 and 2009-07-11							
Date	Report by	Positive Flag	Note					
2008-07-11	Mr. Townsend	Y	Letter from Mr. Townsend, President of the Local United Way Chapter, thanking Nathan for the support from not only himself, but the entire staff from the Dallas warehouse during the latest United Way Drive.					
Viewing No	otable Inci	dents						

Annual Evaluations

Human Capital Man	agement		Edit View Notable Incidents Back To Log
HCM Manager Search Go	Job Classification Drywall Foreman	Employee Nathan Richardson Sign	Manager Suzette Watson
HCM Manager			View previous plan: 2008-07-112009-07-11
Hiring Requisitions Applicant Management Workforce Planning Workforce Planning Resource Scheduling Training	Performance Standards for Drywall Foreman	Agreed Performance Plan and Objectives for Nathan Richardson (2008-07-11 to 2009-07-11)	Observations and Evaluations

Annual evaluations have been designed to be pre-populated with all the items from the interim evaluations that were flagged to be carried forward to the Final Evaluation. Annual Evaluations allow the manager to enter additional observations/notes against each section of the employee's plan and to rate the performance in each category between 'Outstanding' and 'Unacceptable'. Additionally, revision to the values carried forward from the Interim Evaluations may also be made. To update the current 'unsigned' Evaluation, click on the [Edit] button. Only unsigned Evaluations may be edited.

The system will default to the latest created review. To review previously performed Annual reviews select the review date then use the **[View Previous Evaluation]** button to retrieve the review information.

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Human Capital Man	agement	Check Spe	lling View Notable Incidents Save Cancel Back To Log
Applicants			
Requisitions		Agreed Performance Plan and	
Workforce Planning	Performance Standards for	Objectives for	
Resource Scheduling	Electricians	John Paul DeMelo	Observations and Evaluations
Courses and Modules		(2006-01-01 to 2007-01-01)	
Classes			00.111.1.1
	values and Individual Behaviors		20 Weight
	Basic Business Conduct		Recongnizes the value in donating time and talent
Review Self-Service Enrollment	Displays behaviors that embody integrity, listening	Displays behaviors that embody integrity, listening	to charitable, civic and other organizations in a
Training Records	business practices, and treats others with respect.	business practices, and treats others with respect.	community and furthers the goals of Superior
Trainer Evaluations Review	Also recongnizes the value in donating time and talent		Construction Inc.
	to charitable, civic and other organizations in a way		Displays behaviors that embody integrity, listening
Dob Classification Performance Stand	and furthers the goals of Superior Construction Inc.		skills, ethical negotiation and other fair and
Carpenter	Work Ethic		and percent priorities
Site Supervisor	Works in a organized, productive way that helps	Works in a organized, productive way that helps	
Enclinicians Employee Performance Plans	maintain proper balance between work priorities and	maintain proper balance between work priorities and	Works in a organized, productive way that helps
Emmanual Derege	personal priorities. Through planning and teamwork is able to accomplish tasks expeditiously and accept	personal priorities.	maintain proper balance between work priorities
	additional responsibilities and assignments that		teamwork is able to accomplish tasks expeditiously
JohnPaul DeMelo	develop new skills and abilities.		and accept additional responsibilities and
Notable Incidents			assignments of Double-click on the held to edit value
JohnPaul DeMelo	Support for Diversity		Supportive of corporate diversity goals.
JohnPaul DeMelo	Demonstrates understanding of the value of diversity	Shows sensitivity to public perceptions, attitudes and concerns about diversity	
Annual Evaluations	diversity internally including managing in a fair and	wertwertre werden einter einge	
- Sandy Sanderson	objective manner. Shows sensitivity to public		
John Jackson	perceptions, attitudes and concerns about diversity.		
Compensation Management			
Salary Planning	Overall Evaluation for	Outstanding Highly Effective Effect	ive Needs Improvement Unacceptable
- Salary History	Values and Individual Behaviors	0 0 0	0
Salary Surveys			
	Learning and Growth		25 Weight 🗾

The Annual Evaluation is completed by updating the observations/notes and setting the Overall Evaluation Ratings against each category. When done [Save] the evaluation.

At any point during the process it is possible to view any Notable Incidents that fall within the current plan year by using the [**View Notable Incidents**] button.

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- Contraction Performance Stand					
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Electricians	Overall Evaluation	for Outstand	ing Highly Effective	Effective Needs Impr	ovement Unacceptable
🖃 🗁 Employee Performance Plans	Others	0	0	0 0	•
Emmanual Derege					
Anderson Cooper					
JohnPaul DeMelo	Overall Performance Ra	ting for: JohnPaul DeN	lelo		
Notable Incidents					
E Conterim Evaluations	Outstaten din n	Linkly Effective	Effective	Neede Inneede and	Linessentable
JohnPaul DeMelo	Outstanding	Fighly Effective	Effective	Needs Improvement	Unacceptable
JohnPaul DeMelo	0	0	0	C	0
E-Conductions	Consistently exceeds all	Meets all and exceeds	Meets all performance	Partially achieves	Fails to achieve
Sandy Sanderson	performance standards	some standards	standards and plan	performance standards	performance standards
John Jackson	and plan objectives.	expectations and plan	objectives.	and plan objectives.	and plan objectives.
Compensation Menagement		objectives.			
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When using the [Edit] option, the reviewer will also update the 'Overall Performance Rating' for the Employee prior to saving the final version for signing.

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Human Capital Mai	nagement							Edit View I	otable Incidents Back To Lo
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Requisitions	Item 3								
Provide Planning Resource Scheduling	To be determined at a lo	wer level							
	Hom 4	No be determined at a lower level							
Courses and Modules	To be determined at a lower level								
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	To be determined at a lo	werlevel							
Review Self-Service Enrollment	Overall Ev	aluation for	o	utstanding	High	ly Effecti	ve Effe	ctive Needs Improvem	ent Unacceptable
Training Records	Ot	hers					Ŀ		
	Performance Ratings in previous reviews for: JohnPaul DeMelo								
Job Classification Performance Stand									
Carpenter					High	lv			
Site Supervisor		Score	Outsta	anding	Effect	ive	Effective	Needs Improveme	nt Unacceptable
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Anderson Cooper	2006-03-22	3.50		ן כ	\checkmark				
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JohnPaul DeMelo									
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Employee Discipline History

This is analogous to the HR Forms version of Discipline Tracking.

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top went	-					Employees						
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Search	Go	SM-EMP01			Amai	nda Matthews	1		4	1		
🖃 🦳 HCM Manager		ALT-WK-BRIGGS			Barry	y Briggs	0		0	0		
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Hiring Requisitions		ZZ-251			Bruc	e Alexandrowicz-Smitherton	0		0	0		
🕀 🦲 Applicant Management		ALT-WK-PENHALL			Bruc	e Penhall	0		0	0		
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interim Evaluations		13	08/Dec/2010	Verbal	Sent Home Without Pay	Amanda Matthe	ews	07/Dec/2010	Submitted			
Annual Evaluations		7		Verbal	Written			10/Nov/2010	Submitted			
Employee Discipline	History	8	19/Nov/2010	Writen	Sent Home Without Pay			19/Nov/2010	Submitted			
Compensation Manager	nent	10	30/Nov/2010	Writen	Written	Damion Hendri	cks	30/Nov/2010	Pending		×	
User-Defined Logs		14	04/Dec/2010	Verbal	Sent Home Without Pay	Amanda Matthe	ews	03/Dec/2010	Employee Signed			
E Constante Maintenance						Discipline Details						
E Contra		Discipline Type	- Select Action -								Save Sul	/bmt
		Action Taken	- Select Action -									
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		Problem Description										4
		Handled By	SM-EMP01 Amanda Matthe	WS								
		Performed Date										
		Resolution										×

The JSP HCM version allows the creation of the record in 'Draft' form so that the employee or anyone else cannot see it. Once the manager submits the record the employee will be able to see the item in Self Service.

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The [Send Email] button is available on a submitted record. It sends a predefined email to the employee that will inform of the Disciplinary Action Notice and it will contain the URL to the self service system.

HCM Manager HCM Manager Konger Konger Konger Constructions Kongen Constructions Co	SIL-EXPOY SIL-EXP-2 SUS-EXP-2 SUS-EXP0 SUS-EXP2 SU-502 SU-502 SL-	Code Performed Date 19htev/2010	Type Verbal Writen	Ananda Matthews Damon Hendricka Glenda Sitnepan Greg Harrison Mavis Longmore Mavis Longmore Mavis Longmore Mavis Longmore Matthews Disc Sett Hone Without Pay	Employees Employee Name spline History exton	Pending 1 0 0 0 0 Handled By	Submitted 1 0 0 0	Signed Signed Signed Signed Pending
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Performance Management Job Classification Performance Stand Discrete Performance Plans Discrete Plans Discrete Plans		19/mov/2010	wraen	Sent Home Without Pay			19///00/2010	Penaing
Interim Evaluations Annual Evaluations	District -							
Employee Discipline History	District. T				Discipline Details			
E Compensation Management	Dissiste ~			Email has be	en sent to Amanda Matthews			
- Salary Planning	Disability -							Send Email
Salary History	International Data	Verbal						
User-Defined Loos	Discipline Type	Verbal						
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E Security	Effective Date	101110			Close Date			
	Problem Description	no choice but to leave. (ahal reverse phsy	cology)					
	Handled By	·						
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	Resolution							×
. 9 5 4 * 7					Discipli	nary Action Notice - Me	essage (Plain Text)	
message								
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From: stephanie.bromfield@ To: Stephanie Bromfield Cc:	⊉cmic.ca							
Subject: Disciplinary Action I	Notice							
A disciplinary action	has been ta	ken, for detail int	Formation p	lease click the	following link	to log on to er	mployee self servi	ice.

The employee will be able to open the item in Self Service and add their own comments as well as their electronic signature to indicate that they have seen the document.

Employee Self S	ervice						Amanda Matthews's Pro	lie <u>Home</u> Logout
	<u>^</u>			Disc	ipline History			
2	Transaction No	Performed Date	Type	Action	Handled By	Effective Date	Status	
Search Go	12	08/Dec/2010	Writen	Written	SUS-EMP-2	08/Dec/2010	Submitted	
Employee Self Service	13	08/Dec/2010	Verbal	Sent Home Without Pay	SM-EMP01	07/Dec/2010	Submitted	
E C Personal Information	7		Verbal	Written		10/Nov/2010	Submitted	
Profile Information	8	19/Nov/2010	Writen	Sent Home Without Pay		19/Nov/2010	Submitted	
	14	04/Dec/2010	Verbal	Sent Home Without Pay	SM-EMP01	03/Dec/2010	Employee Signed	
W-4 Information								
Ferring Contacto								
Skills				Dise	cipline Details			
Certification and Licenses								Save
Degrees	Discipline Ty	pe Writen						
Interim Evaluation	Action Tak	en S						
Discipline History	Effective Dat	te 191110			Close Date	興		
Corporate Learning		What I consider to be insubordinatio	n					*
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	D Pur sinci a this action	I am antianticately a that I have been a		and the second se	if immediate and and a			
	 by signing this notice 	, i am acknowieuging that i have been ci	ounseleu aoout my inappro	spriate conduct and informed of consequences	n improvements are not made.			
	Sign							
1								

Employee Self Service	Discipline History								
**	Transaction No	Performed Date	Туре	Action	Handled By	Effective Date	Status		
	12	08/Dec/2010	Writen	Written	SUS-EMP-2	08/Dec/2010	Submitted		
Employee Self Service	13	08/Dec/2010	Verbal	Sent Home Without Pay	SM-EMP01	07/Dec/2010	Submitted		
C Personal Information	7		Verbal	Written		10/Nov/2010	Submitted		
Profile Information	8	19/Nov/2010	Writen	Sent Home Without Pay		19/Nov/2010	Submitted		
	14	04/Dec/2010	Verbal	Sent Home Without Pay	SM-EMP01	03/Dec/2010	Employee Signed		
I d1 information									
- Emergency contacts				Disci	pline Details			_	
Cartification and Licenses	Discipline Type	Verbal							
Degrees		-							
Memberships	Action Taker	S							
Interim Evaluation	Effective Date	031210			Close Date 061210				
- Annual Evalution		001210			00000000				
- Discipline History		another test - for good measure							
Payment Administration									
Corporate Learning	Problem Description	1							
C Recruiting									
Corporate Information									
Security	Handled By	/ SM-EMP01							
Manager Sen Service	Destanced Date	044240							
	Performed Date	041210							
		I'm not so sure							
	Resolution	1							
	Sign Date	101210							
		test							

Compensation Management

Salary Planning

🍯 Human Capital Management - Microsoft Int	ernet Explorer						
File Edit View Favorites Tools Help							
🛛 🔇 Back 🔹 🕥 👻 😰 🚮 🔎 Search 🤞	Favorites 🧑 🛛 🔗 🗸 👌	l 🖂 🗖 🛍 🚳					Links »
109 CMIC						David Arrow:	mithGB's Profile Home
Salary Planning							Save Update Payroll
🗘 🛛 HCM Manager 🗠				Increase			Apply
Search Go	Increase Date			Salary Increase Pe	rcent	Bonus Increase Per	ent
E- CM Manager	Reports To Position	6A Project Manager	-	Indirect R	eport 🗖	Refresh Positio	ns Show Budget
Position Control Hiring Requisitions				Positions			
Applicant Management	Position 6A	SITE001	Employee	IohnPaul DeMelo	Increase Date	01 Aug 2006 🜉	
Vvorkforce Planning Training	Current Salary	57,200.00	Current Bonus	0.00	Current Total	57,200.00	Apply
Performance Management	Increase Percent	5	Increase Percent		Increase Amount	2,860.00	Lindate Payroll
Salary Planning	Proposed Salary	60,060.00	Proposed Bonus	0.00	Proposed Total	60,060.00	C opulato r a from
Salary History							V
Cone Cone							nternet //.

Salary Planning Initial Display

Salary Planning allows updates to Payroll or just to the Budgeted payroll amounts. Checking the Indirect Reporting option allows specification of employees that do not directly report to the supervising position as selected (this value defaults the current users position). The Refresh Positions button is used to display a list of positions that reports to the "Reports to Position" in the top section of the screen. If the "Indirect Report" flag is checked, the list in the Positions section of the screen will include indirect reports.

To apply a Salary Increase Percent and a Bonus Increase Percent to positions, enter the increase in the top section and check the Apply checkboxes for all the positions that this increase will be applied to. Then click on the Apply link at the top of the Increase section. This will update all positions with the Apply flag checked with the increase percent amounts. Alternatively, the user can enter different increase percent amounts in each position.

From Date 01 Jan 20	06 🖳	To Date 31 Dec 2006	6	Recal	culate Close
Current Salary Total	57,200.00	Current Bonus Total	0.00	Current Total	57,200.0
Increase Percent	5.00	Increase Percent	0.00	Increase Percent	5.0
Proposed Salary Total	60,060.00	Proposed Bonus Total	0.00	Proposed Total	60,060.0
				Budget Total:	58,398.85

Salary History

🚰 Human Capital Management - Micros	oft Internet Explorer					
File Edit View Favorites Tools F	Help					
🔇 Back 🔹 🕥 🖌 🖹 😰 🚮 🔎 Sea	arch 👷 Favorites 🛛 🤗 🖓 🕇 🐉 🛽	3 🖵 🛍 🤹		Links		
DS CMIC				David ArrowsmithGB's Profile Hom		
Salary Planning	g			Save Update Payro		
HCM Manager	ZZ-901	John Jackson	Vice President - Marketing			
	6A-NAP031WH	JohnPaul DeMelo	6a Site Manager 001			
earch	Go PY-999	Maheen Jafari	Customer Support Rep			
HCM Manager	6A-NAP001WH	Michael Anderson	6A General Labour Nonunion			
	ZZ-100	Patrick Peterson	Vice President - Sales			
Hiring Requisitions	ZZ-900	Sandy Sanderson	Vice President - Construction	1		
Applicant Management	ZZ-900	Sandy Sanderson	Site Supervisor President			
🗄 🦰 Workforce Planning	ZZ-800	Sue Christensen				
🕀 🦰 Training		line en i				
Performance Management		Sala	iry History			
- Compensation Management	Effective Date	Action	Annual Salary	Hourly Rate		
Salary Planning	01/Jan/1999	New Hire		13.53		
- Salary History	01/Jan/2001	Increment		47.00		
➡ Salary Surveys ➡ Dile Maintenance ➡ Discurity						
	*					
iavascript:launchUrl('/HrSalarvHistory/'.'co	ontentFrame',false);			internet		

Salary Planning History Default Screen Example

The Salary History option will display records from Payroll Employee History where the change type was either New Hire, Re-Hire or Increment.

NOTE: Only pay changes made using the update type of "Increment" will be displayed.

Salary Surveys

HCM Manager 🛛 🔠	Salary Survey								
arch Go	Survey Name		Date						
🔁 HCM Manager	Region		Job Classification						
Position Control Job Classifications	Low Salary		High Salary						
	Median Salary		Average Salary						
Grganizational chart	Market Rate		Cost Of Living Adjustment						
Dob Classification Performance Stand Employee Performance Plans Notable Incidents Notable Incidents									

Salary Surveys are for reference only. They allow you to record results from different external surveys by position. This information can then be used via 3rd part reporting tools compare your own salary ranges to that of surveys.

There are no required fields on this page. But we recommend that a name and date at least be entered.

Salary Increase

Load Save Cancel Import Export Process

	Year 2013 Page: 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 Next Records Display Per Page 20 💌																	
Select Employee		0.1	Deterror		Forced	Forced Rank			Basic Wages - Enterprise			Bonus - Enterprise			Deferred Com			
	No.	Employee Name	Category	Potential	vunerability	Rating	Percentile ICP Signed	Previou	Current	Percentage	Proposed	Previous	Current	Percentage	Proposed	Previous	Curren	
	01012012	smith hugo	Select	Select	Select		Select 💌]									
	01234	Employee Test	New Hire 💌	Medium Potential	Medium Vulnerability 💌		Mid	01-01-2013		288.46	0	2000	0	0	0	0	0	0
	1	Darren Billings	Select	Select	Select		Select 💌		1									
	100017	Leave Accrued	Select	Select	Select		Select 💌]	1800	0		0	0	0		0	0
	1001	Peterson Gerald	Select	Select	Select		Select 💌		524	0 0	-100		0	0	0		0	0
	1002	tezs test	Select	Select	Select		Select 💌		1									
	100200	TEST TEST	Select	Select	Select		Select 💌]	4903.86	0		0	0	0		0	0
	1011	Mary Gary	Select	Select	Select		Select 💌			7692.3	0		0	0	0		0	0
	1012	test test	Select	Select	Select		Select 💌			57730.74	0		0	0	0		0	0
	1013	test test	Select	Select	Select		-Select-			58461.48	0		0	0	0		0	0
	1021	Lisa Hey	Select	Select	Select		Select 💌		1538.4	6153.84	300		0	0	0		250	250
	10220	Ba NI	Select	Select	Select		Select 💌			6538.48	0		0	0	0		0	6550
	1044214	Jeremy Forrester	Select	Select	Select 💌		-Select- V		2884.6	2 0	-100		0	0	0		0	0
	1044217	Antonio Banderas	Select	Select	Select		Select 💌		17208.6	6 8732.76	-49.254		0	0	0		750	1250
	1044220	Jared Cooper	Select	Select	Select		Select 💌		22043.8	6 10494.25	-52.394		0	0	0		500	250
	1044221	Daniel Rock	Select 💌	Select	Select		Select 💌		19107.6	17653.8	-7.609		0	0	0		500	750
	1044222	Lantern Green	Select	Select	Select		Select 💌											
	1044223	Dean Harris	Select	Select	Select		Select 💌		J									
	1044226	West Jeremy	Select	-Select	Select		Select 💌		1	2083.33	0		0	0	0		0	0
	10445	Jina Gold	Select	Select	Select		Select 💌			9000	0		0	0	0		0	250

This program allows user to increase salary of employees.

File Maintenance

Overview – File Maintenance

The tables included in HCM module include tables that in some cases can also be maintained within the Forms HR or Payroll Modules. For the purpose of this manual only the file that can be updated via the HCM system will be discussed.

Application Questions

Hr Application fo	or E	mployment Questions	Demo Arrowsmith's Profile Home Check Spelling Save Cancel
File Maintenance	*	Display Order [*] Question [*]	A
Area of Interest		Display Order Question	Delete
Applicant Rating		1 Why do you wish to join our team?	×
Attendee Status		2 Why should we hire you?	×
Certifications and Licenses		3 Describe your ideal position.	×
Class Status		4 What specific skills makes you appropriate for this position for which you are applying?	×
Course Types			
Corporate Performance Standards			
Degrees			
Education			
Geographical Area			
Hiring Actions			
HR Recruiters			
HR Regions			
Membership Type			
Menu Maintenance			
Organization Type			
Physical Demands	Ξ		
Salary Grade			
Skills			
Irainers			
Training Teams			
Trainer Evaluation Ratinos			
User-Defined Log Types			
User-Defined Logs			
Work Environment	Ŧ		-

Application Questions are used on the Self Service Applicant Screen. They allow you to customize your application form.

Adding New Questions

To add a new record use the **[Add]** button at the top of the screen. This will open up two new fields above the list of actions already defined.

Both fields the Display Order and Question are required fields. Enter the new information and then when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

Use the [Check Spelling] button to initiate Spell Checker on the Question field.
Update or Delete an Existing Record

To update an existing record select the record from the list by clicking on the code field. This will highlight the complete line and place the info into an area at the top of the list where the data can be changed.

Enter the new information and then when done use the [Save] button. To exit Add Mode without saving any changes use the [Cancel] button.

To delete the record, use the Delete Icon to remove the highlighted record.

Application Status

Application State	us	Maintenance			Demo Arrowamith's Profile Home Save Cancel
File Maintenance	*			Application Status Maintenance	×
Application Questions		Code	Description		×.
Application Status					
Area of Interest		Code		Description	Delete
Applicant Rating		APPLIED		Applied	×
Attendee Status		CLOSED		Closed	×
Certifications and Licenses		HIRED		Hired	×
Class Status		OPEN		Open	×
Course Types		REJECTED		Rejected	×
Corporate Performance Standards		12020120		1000100	
Degrees					
Genoranhical Area					

The Application Status is used to enter the status of any application entered in HCM. This application status can be entered in an action on the application of the applicant. There will already be a status of 'Applied' in this table.

Adding a New Application Status

To add a new status, click on the [Add] button at the top of the screen. This will open up two new fields above the list of actions already defined.

The Code is a required field but the Description is not. Enter the new information and then when done use the [**Save**] button. To exit Add Mode without saving any changes use the [**Cancel**] button.

Update or Delete an Existing Record

To update an existing record, select the record from the list by clicking on the code field. This will highlight the complete line and place the info into an area at the top of the list where the Description can be changed.

Enter the new information and when done use the [Save] button. To exit Add Mode without saving any changes use the [Cancel] button.

Area of Interest

e Maintenance		Area Of Interest	
Application Questions	Area Of Interest Code	Area Of Interest Name	
Application Status	Area Of Interest Code	Area Of Interest Name	Delete
Applicant Rating	ADMIN	Administration	×
Attendee Status	ARCHIT	Architecture and Planning	×
Certifications and Licenses	CARP	Carpentry	×
Class Status	ELECTR	Electrical	×
Course Types	FINANC	Financials Position	×
Corporate Performance Standards	HVAC	HVAC Specialization	×
Education	PM	Project Management	×
Erequency Status	SUPERV	Supervisor	×
HR Recruiters HR Regions Membership Type Memu Maintenance Organization Type Physical Demands E Salary Grade Salary Grade Salary Grade Salary Trainers Trainer Evaluation Questions Trainer Evaluation Questions			

The Area of Interest is used to enter preferences on areas of interest. These will be used in the Applicant Self-Serve screen when the applicant applies for a requisition as well as the Applicant screen when a new applicant is created.

Adding a New Area of Interest

To add a new Area of Interest, click on the **[Add]** button at the top of the screen. This will open up two new fields above the list of actions already defined.

The Area of Interest Code and Area of Interest Name are required fields. Enter the new information and when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

Update or Delete an Existing Record

To update an existing record, select the record from the list by clicking on the code field. This will highlight the complete line and place the info into an area at the top of the list where the Area of Interest Code and Name can be changed.

Enter the new information and when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

Applicant Rating

le Maintenance	*	A	pplicant Rating	
Application Questions	Applicant Rating Code	Applicant Rating Value	Applicant Rating Description	
Application Status	Applicant Rat	ing Code Applicant Ratio	Applicant Rating Name	Dele
Area of Interest	POOR	1	Poor	X
Attendee Status	AVERAGE	2	Average	X
Certifications and Licenses	GOOD	3	Good	×
Class Status	EXCELLENT	3	Excellent	×
Course Types	ENGLEEENI	•	Excellent	
Degrees Education Frequency Status Geographical Area				
Degrees Education Frequency Status Geographical Area Hring Actions HR Recruiters HR Regions Membership Type				
Degrees Education Frequency Status Geographical Area Hring Actions HR Regions Membership Type Memu Maintenance Organization Type Physical Demands Salang Grade	Е			
Degrees Education Frequency Status Geographical Area Hiring Actions HR Recruters HR Regions Membership Type Membership Type Membership Type Physical Demands Salary Grade States Trainers	E			

Applicant Ratings are used in the References Tab of the Applicant screen.

Adding New Ratings

To add a new record use the [Add] button at the top of the screen. This will open up three new fields above the list of actions already defined – Applicant Rating Code, Applicant Rating Value and Applicant Rating Description.

All the fields are required fields. Enter the new information and then when done use the [Save] button. To exit Add Mode without saving any changes use the [Cancel] button.

Update or Delete an Existing Record

To update an existing record select the record from the list by clicking on the code field. This will highlight the complete line and place the info into an area at the top of the list where the data can be changed.

Enter the new information and then when done use the [Save] button. To exit Add Mode without saving any changes use the [Cancel] button.

Attendee Status

ile Maintenance	^		Attendee Status		
Application Questions	Attendee	Status Code	Attendee Status Descripti	on	
Application Status		Attendee Status Code	Attend	ee Status Description	Delete
Area of Interest	ABSENT		Absent from class		×
Attendee Status	ENROLLED		Enrolled		×
Certifications and Licenses	DDESENT		Bresent for class		÷.
Class Status	PRESENT		Present for class		
Course Types					
Corporate Performance Standards					
Degrees					
Education					
Frequency Status					
Geographical Area					
Hiring Actions					
HR Recruiters					
HR Regions					
HR Regions Membership Type					
) HR Regions Membership Type Menu Maintenance					
HR Regions Membership Type Menu Maintenance Organization Type					
HR Regions Membership Type Menu Maintenance Organization Type Physical Demands	E				
HR Regions Membership Type Menu Maintenance Organization Type Physical Demands Salary Grade	Е				
] HR Regions] Membarship Type] Menu Maintenance] Organization Type] Physical Demands] Salary Grade] Skills	E				
) HR Regions Membership Type Menu Maintenance Organization Type Physical Demands Salary Grade Skils Trainers	E				
HR Regions Membership Type Menu Maintenance) Organization Type Physical Demands) Salary Grade) Skils) Trainers Training Teams	E				
HR Regions HR Regions Membership Type Mennu Maintenance Organization Type Physical Demands Salary Grade Skile Trainers Trainer Evaluation Questions	E				

This screen allows add/delete different Course Attendees statuses.

Certifications and Licenses

File Maintenance	-			Certification	Maintenance				
Application Questions		Code FORKLIFT	Descri	iption Basic Forklift	Cost	350	Validity	1 Years 🔻	
Application Status		Code		Description		Cost	Validity	Period	De
Applicant Rating	F	ORKLIFT	Basic Forklift			350.00		1 Years	
Attendee Status	F	MP	Project Manag	gement Certificate		2,000.00		5 Years	
Certifications and Licenses		3MI002	Smith Certific	ation - 4 YR		0.00		4 Years	
Class Status	2	ZZ-SAFETY1	Basic Safety	Traiining		100.00		1 Years	
Course Types				2					
Corporate Performance Standards									
 Corporate Performance Standards Degrees Education 									
Corporate Performance Standards Degrees Education									
Corporate Performance Standards Degrees Education Frequency Status									
Corporate Performance Standards Degrees Education Frequency Status Geographical Area									
Corporate Performance Standards Degrees Education Frequency Status Geographical Area Hiring Actions HB Recruiters									
Corporate Performance Standards Degrees Education Frequency Status Geographical Area Hiring Actions HR Recruiters HR Recoins									
Corporate Performance Standards Degrees Education Frequency Status Geographical Area Hiring Actions HR Recruiters HR Regions Membership Type									
Corporate Performance Standards Degrees Education Frequency Status Geographical Area Hiring Actions H R Recruiters H R Regions Membership Type Menu Maintenance									
Corporate Performance Standards Degrees Education Frequency Status Geographical Area Hiring Actions HR Recruiters HR Repoins Membership Type Memu Maintenance Organization Type									
Corporate Performance Standards Degrees Education Frequency Status Geographical Area Hiring Actions HR Recruiters HR Repions Membership Type Membership Type Physical Demands	Е								
Corporate Performance Standards Degrees Education Frequency Status Geographical Area Hring Actions HR Recruiters HR Repoins Membership Type Menu Maintenance Organization Type Physical Demands Salary Grade	ш								
Corporate Performance Standards Degrees Education Frequency Status Geographical Area Hiring Actions HR Recruiters HR Regions Membership Type Menu Maintenance Organization Type Physical Demands Salary Grade Skills	ш								
Corporate Performance Standards Degrees Education Frequency Status Geographical Area Hiring Actions HR Recruiters HR Repions Membership Type Menu Maintenance Organization Type Physical Demands Salary Grade Skills Trainers	ш								
Corporate Performance Standards Degrees Education Frequency Status Geographical Area Hring Actions Hr Recruiters HR Recruiters HR Regions Membership Type Menu Maintenance Organization Type Physical Demands Salary Grade Stalis Training Teams	ш								
Corporate Performance Standards Degrees Education Frequency Status Geographical Area Hiring Actions HR Recruiters HR Regions HR Regions Membership Type Memu Maintenance Organization Type Physical Demands Salary Grade Skills Trainers Trainer Seulation Questions									
Corporate Performance Standards Degrees Education Frequency Status Geographical Area Hring Actions HR Recruiters HR Regions HR Regions Membership Type Menu Maintenance Organization Type Physical Demands Salary Grade Salary Grade Status Trainere Evaluation Questions Trainere Evaluation Ratings									

Certifications and Licenses can be created either via HCM or via the Enterprise HR Module. This means that when this program is first entered, there may already be data defined if the Enterprise HR Module has been utilized in the past.

Certifications and Licenses are one of the attributes that can be applied to Job Classifications, and are used by the applicants programs. For example an 'Accountant' Job Classification may have certification requirement such as a Certified Payroll Accountant.

When this program is first opened it will display all records previously defined.

Adding New Certifications/Licenses

To add a new record use the **[Add]** button at the top of the screen. This will open up four new fields above the list of degrees already defined.

Both fields the code and the description are required fields. The Cost and Validity Period fields are optional and are currently for reference only. Enter the new information and then when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

Update or Delete an Existing Record

To update the description, Cost or Validity period of an existing record select the record from the list by clicking on the code field. This will highlight the complete line and place the info into an area at the top of the list where all fields except the code can be edited.

Enter the new information and then when done use the [Save] button. To exit Add Mode without saving any changes use the [Cancel] button.

To delete the record, use the Delete Icon to remove the highlighted record.

Class Status

ile Maintenance			Class Status	
Application Questions		Class Status Code RESCHED	Class Status Description Rescheduled	
Application Status		Oliver Distan Code	Charle Database	Delute
Area of Interest		Class Status Code	Class Status Description	Delete
Applicant Rating		CANCELLED	Cancelled	<u>^</u>
Attendee Status		DONE	Class has ended	^
Certifications and Licenses		IN PROG	In progress	x
Class Status		NOSTART	Not yet started	×
Course Types				
Corporate Performance Standards				
Education				
Enduancy Status				
Geographical Area				
Hiring Actions				
HR Recruiters				
HR Regions				
Membership Type				
Menu Maintenance				
Organization Type				
Physical Demands	=			
Salary Grade				
Skills				
Trainers				
Trainers Training Teams				
Trainers Training Teams Trainer Evaluation Questions				
Trainers Training Teams Trainer Evaluation Questions Trainer Evaluation Ratings				

This screen allows to Add/Delete different Courses Statuses.

Course Types

Maintenance			Add
Course Type Code	Course Type Description	Course Type Display Order	Delete
1	Elementary or grade school	1	×
2	High school	2	x
3	Apprentice business or vocational	3	X
5	Undergraduate college	4	×
6	Masters degree	5	X
7	Doctorate	6	x
4	Other	7	×

This screen allows user to add and delete different types of courses.

Corporate Performance Standards

in the second seco				Sue Chi	istensen's	Profile Ho
Corporate Perform	nance Standa	irds				
HCM Manager			Categories			
ch Go	Category Title Values a	nd Individual Behaviors	VVeigh	nt 20 Display Order	1 Save	Cancel
HCM Manager		Category Title	Weight	Display Order	1	Action
Position Control	Values and Individual Bel	naviors		20	1	×
- 🛅 Hiring Requisitions	Learning and Growth			25	2	×
Applicant Management	Demonstrated Profession	al Skills		30	3	×
Vorkforce Planning	Superior Construction Pro	DCesses		15	4	×
	Others			30	5	x
Compensation Management						
			Sections			
Skills						New
						140.44
Certifications and Licenses	Section Title		Text		Displ Orde	ay er Action
		Displays behaviors that embody integrity	/, listening skills, ethical neg-	otiation and other fair and equitable		
Trainers Trainer Evaluation Ratings Trainer Evaluation Questions	Basic Business Conduct	business practices, and treats others w to charitable, civic and other organization and furthers the goals of Superior Const	ith respect. Also recongnize ns in a way that enhances f truction Inc.	es the value in donating time and tale the individual, supports the communi	nt Y	1 ×
Corporate Performance Standards	Work Ethic	Works in a organized, productive way the personal priorities. Through planning and additional responsibilities and assignment	nat helps maintain proper ba I teamwork is able to accorr nts that develop new skills a	lance between work priorities and plish tasks expeditiously and accep nd abilities.	13	2 🗙
Salary Grade	Support for Divorativ	Demonstrates understanding of the valu	e of diversity in all its forms	in the workplace and helps promote Shows constituity to public		. 🗸

The corporate performance standards are the base from which all performance standards for the organization are created. Performance standards are broken into two areas, the category which carries a weighting factor and sections which are the required standards by category.

The structure of the performance plan created here cannot be changed at the Job Classification or Employee Level. This means the Categories and Section Titles and Order of the Standards cannot be changed. The only part that may be changed is the text of a section.

Adding New Performance Categories

To add a new Performance Category use the [**New**] button at the top of the screen. This will open up an area above the list of already defined categories.

The Title is the only required field. The weight, is the importance of this category compared to the others. Enter the new information and then when done use the [**Save**] button. To exit Add Mode without saving any changes use the [**Cancel**] button.

Update or Delete an Existing Record

To update an existing record select the record from the list by clicking on the code field. This will highlight the complete line and place the info into an area at the top of the list where all fields except the Code may be changed.

Enter the new information and then when done use the [Save] button. To exit Add Mode without saving any changes use the [Cancel] button.

To delete the record, use the Delete Icon to remove the highlighted record.

Adding Sections to Performance Categories

To add a section to an existing Category use the [**New**] button at the top of the Sections area of the screen. This will open up multiple fields at the top of the region area.

The only required field is the Section Title. Use the [**Check Spelling**] button to initiate Spell Checker on the Text field. Once done use the [**Save**] button. To exit Add Mode without saving any changes use the [**Cancel**] button.

Update or Delete an Existing Section

To update an existing record select the record from the list by clicking on the code field. This will highlight the complete line and place the info into an area at the top of the list where all fields changed.

Enter the new information and then when done use the [**Save**] button. To exit Add Mode without saving any changes use the [**Cancel**] button. To delete the record, use the Delete Icon to remove the highlighted record.

Degrees



Degrees can be created either via HCM or via the Enterprise HR Module. This means that when this program is first entered, there may already be data defined if the Enterprise HR Module has been utilized in the past.

Degrees are one of the attributes that can be applied to Job Classifications. For example an 'Engineer' Job Classification would probably have a Degree requirement of a BSC.

When this program is first opened, it will display all 'Degrees' previously defined.

Adding New Degrees

To add a new Degree use the [Add] button at the top of the screen. This will open up two new fields above the list of degrees already defined.

Both fields the degree code and the description are required fields. Enter the new information and then when done use the [**Save**] button. To exit Add Mode without saving any changes use the [**Cancel**] button.

Update or Delete an Existing Degree

To update the description of an existing degree, select the record from the list by clicking on the Degree code field. This will highlight the complete line and place the info into an area at the top of the list where the Description can be edited. The Code cannot be changed.

Enter the new description and then when done use the [**Save**] button. To exit Add Mode without saving any changes use the [**Cancel**] button.

To delete the record, instead of changing the description at the top of the screen use the Delete Icon to remove the highlighted record.

Education

BROMIC					Suzette Watson's Profile Hom
Education Main	ten	nance			Ad
Kesource Scheduling		Code	Name	Level	Delete
		GRADE13	Advanced High School	High school	X
Courses and Modules		GRADE12	Basic High School	High school	x
Training Nominations		COLLEGE-1	College One Year	Undergraduate college	×
Class Eproliment		COLLEGE-3	College Three Year	Undergraduate college	×
Review Self-Service Enrollment		COLLEGE-2	College Two Year	Undergraduate college	×
Training Records		PHYSICS	Physics	Undergraduate college	X
Trainer Evaluations		PRGRMNGV	Programming	Apprentice business or vocational	×
Trainer Evaluations Review		PRGMNG	Programming	Indergraduate college	X
😑 🗁 Performance Management		PSYCH	Psychology	Lindergraduate college	X
– Job Classification Performance Star	nd	GENERAL T	Science Tech and Trades	High school	×
Employee Performance Plans			Trade	Annrentice husiness or vocational	×
- Intoxip Evolutions		LINE3	University 3 Vear	Lipperaraduate college	×
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Salary Planning		UNI-7	University / real	Lindergraduate college	Ŷ
Salary Surveys Salary Surveys Menu Maintenance Menu Maintenance Salary Surveys Certifications and Licenses Hiring Actions Certifications and Licenses Hiring Actions Corporate Performance Standards Work Environment Acta of Interest Geographication Status Acta of Interest Geographicat Area Hiring Acta Salary Crade Membership Type					
- Organization Type	-				
•	•				

Education is one of the attributes used in the Applicant and Applicant Self-Serve screens. When this screen is first opened, it will display all records previously defined.

Adding Education

To add a new record use the **[Add]** button at the top of the screen. This will open up three new fields above the list already defined.

The Code, Name and Level are required fields. The Level field provides a drop-down list with predefined values. Enter the new information and then when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

Update or Delete an Existing Record

To update the Code, Name or Level of an existing record, select the record from the list by clicking on the code field. This will highlight the complete line and place the info into an area at the top of the list where all fields except the code can be edited.

Enter the new information and then when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

To delete the record, use the Delete Icon to remove the highlighted record.

Frequency Status

ntenance

Frequency Description	Frequency Days	Delete
3 Year	1095	×
5 Year	1825	×
Monthly	30	×
Yearly	365	×
	Frequency Description 3 Year 5 Year Monthly Yearly	Frequency Description Frequency Days 3 Year 1095 5 Year 1825 Monthly 30 Yearly 385

Add

Geographical Area

188 CMIC			Suzette Watson's Profile Home
Geographical Area	a		Add
	Geo Area Code	Geo Area Name	Delete
Training Records	CALIF	California	×
Trainer Evaluations	FL	Florida	×
Performance Management	GTA	Greater Toronto Area	×
In Classification Performance Stand	MINAES	Midweet LISA	¥ 1
Employee Performance Plans	NOPTHE	Nothcost USA	;
Notable Incidents	NORTHN	North East USA	;
Interim Evaluations	INDRIHW	NUNINVESLUSA	<u> </u>
Annual Evaluations	NYC	New York City and Area	:
Compensation Management	Isw	Southwest USA	×
Salary Planning			
- Salary History			
Salary Surveys			
E File Maintenance			
Menu Maintenance			
Degrees			
Trainers			
Trainer Evaluation Questions			
Corporate Performance Standards			
Physical Demands			
Application Status			
Geographical Area			
HR Regions			
Membership Type			
Organization Type			
Application Guestions			
Log Builder			
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± Security			
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The Geographical Area is used to enter geographical areas where the applicant would be willing to work. It is used in the Applicant Self-Serve screen when the applicant applies for a requisition as well as the Applicant screen when a new applicant is created.

Adding a New Geographical Area

To add a new Geographical Area, click on the **[Add]** button at the top of the screen. This will open up two new fields above the list of actions already defined.

The Geographical Area Code and Geographical Area Name are required fields. Enter the new information and when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

Update or Delete an Existing Record

To update an existing record, select the record from the list by clicking on the code field. This will highlight the complete line and place the info into an area at the top of the list where the Geographical Area Name can be changed.

Hiring Actions

Training Records		Display Action Groups: 🔍 All 🔍 Ap	plication 🔍 Requisition	
Trainer Evaluations Review	Code	Description	Action Group	Delet
> Performance Management	APPLIED	Applied	Application Action	×
Job Classification Performance Stand	COMPLETED	Completed	Requisition Action	×
	CREATEPOS	Creation of Position	Requisition Action	×
🗀 Notable Incidents	HIRE	Hired	Application Action	×
Caluations	INTERVIEW	Interviews	Application Action	×
Annual Evaluations	OFFER	Offer Sent to Applicant	Application Action	X
Compensation Management	PENDING	Pending Reply from Applicant	Application Action	X
	PLACED AD	Placed Advartisement	Requisition Action	×
Salary History		Engage a 3rd Party Search Firm	Requisition Action	
Salary Surveys	SRCH FIRM	Engage a ord Party Search Firm	Requisition Action	
- Cie Meintenenen	TERMINATED	Terminated Position Opening	Requisition Action	^
Trainers Trainer Evaluation Ratings Trainer Evaluation Questions Corporate Performance Standards Physical Demands Work Environment Area of Interest Geographical Area HR Regions Salary Grade Membership Type Organization Type Application Questions User-Defined Logs Log Builder				

Hiring actions are used by Hiring Requisitions and Applications to record the different actions taken during the process of filling a position. An Action can be recorded against the requisition along with descriptive fields such as associated cost, who completed the action and when. An Action can also be recorded against an application to track the status of the application with action name, action date, action taken by whom and notes. Requisition actions will be displayed for Requisitions and Application Actions will be displayed for Applications.

Adding New Hiring Actions

To add a new record use the **[Add]** button at the top of the screen. This will open up three new fields above the list of actions already defined.

The code, description and action group fields are required fields. Enter the new information and then when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

Update or Delete an Existing Record

To update the description of an existing record select the record from the list by clicking on the code field. This will highlight the complete line and place the info into an area at the top of the list where the description can be changed.

Enter the new information and then when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

HR Recruiters

Recruiter Mainten	ance					Save Cancel
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E CM Manager	Recruiter Description					
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🗈 🗀 Performance Management						
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Geographical Area						
Hiring Actions						
HR Recruiters						
HR Regions						
Membership Type						
Organization Type						
Physical Demands						
	4					
Training Teams						
Trainer Evaluation Questions						
— Trainer Evaluation Ratings						
User-Defined Log Types						
🔄 🔄 User-Defined Logs						Þ

HR Recruiters is used to enter a recruiter on the hiring requisition.

Adding a New HR Recruiter

To add a new HR Recruiter, click on the [Add] button at the top of the screen. This will open up four new fields above the list of recruiters already defined.

The HR Recruiter Code is a required field. Enter the new information and when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

Update or Delete an Existing Record

To update an existing record, select the record from the list by clicking on the code field. This will highlight the complete line and place the info into an area at the top of the list where the Recruiter information can be changed.

HR Regions

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NVV	North West USA	×
NY	Greater New York Area	×
SE	South East USA	×
	Internet Explorer	Internet Explorer

HR Regions are used in conjunction with salary grades, allowing the same salary grade to be different by physical region. This allows for the differences in pay scales between different regions of the country.

HR Regions are also used in the Enterprise HR System.

Adding New Regions

To add a new record use the **[Add]** button at the top of the screen. This will open up two new fields above the list of actions already defined.

Both fields the Region Code and Name are required fields. Enter the new information and then when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

Update or Delete an Existing Record

To update an existing record select the record from the list by clicking on the code field. This will highlight the complete line and place the info into an area at the top of the list where the Name can be changed.

Enter the new information and then when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

Membership Type

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irch Go	Туре	Description	Short Description	
🔁 HCM Manager	Туре	Description	Short Description	Delete
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- Applicant Management	GUEST	Guest Member	Guest	×
Vorkforce Planning	P-TIME	Part-Time Member	Part-time	×
Berformence Menagement	REGULAR	Regular Member	Regular	×
Trainer Evaluation Rulings Trainer Evaluation Questions Corporate Performance Standards HR Regions Salary Orade Membership Type Organization Type Application Questions Log Builder Default Filters Security				

Membership types are used along with Organizations to describe the type of membership an employee or applicant has with an organization.

Adding New Membership Types

To add a new record use the **[Add]** button at the top of the screen. This will open up three new fields above the list of Membership types already defined.

All 3 fields are required. Enter the new information and then when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

Update or Delete an Existing Record

To update an existing record select the record from the list by clicking on the code field. This will highlight the complete line and place the info into an area at the top of the list where the data can be changed.

Enter the new information and then when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

Organization Type

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💠 🛛 HCM Manager 🛛 🚪		Organia	zation Type Maintenance		
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🗄 🗀 Training	Code	Description	Short Descriptio	n	Action
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Organization Types are used in both HCM and Enterprise HR. Organization Types allow for the grouping of different organizations by organization type. For example an organization Type might be 'Associations' and under Associations you may have the American Payroll Association and the Canadian Payroll Association.

Adding New Organization Types

To add a new Organization Type use the [Add] button at the top of the screen. This will open up an area above the list of types defined.

The Code, Description and Short Name are required fields. The other check box fields should be checks as required for the organization type. Enter the new information and then when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

Update or Delete an Existing Record

To update an existing record select the record from the list by clicking on the code field. This will highlight the complete line and place the info into an area at the top of the list where all fields except the Code may be changed.

Enter the new information and then when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

Linking an Organization to an Organization Type

To add an Organization to an existing type use the [New] button at the top of the Organization Maintenance section of the screen. This will open up multiple fields at the top of the region area.

The only required fields are Organization Code, Name and Short Name, the address info is not required... Once done use the [Save] button. To exit Add Mode without saving any changes use the [Cancel] button.

Physical Demands Demo Arrowsmith's Profile Home Physical Demands Maintenance Add Salary Surveys Salary Increase Salary Increase File Maintenance Application Questions Area of Interest Area of Interest Code Name Description Delete / Must be able to comfortably lift and manhandle 10KG LIFT-10 Lifting 10KG LIFT-20 OFFICE Lifting 20KG Must be able to comfortably lift and manhandle 20KG × Internal Office Position Office Job - No Physical Demands Required WEATHER Outside Work - Weather Demands Outside Position Requiring Ability to Withstand Various Weather Related Demands Applicant Rating Attendee Status Attendee Status Certifications and Licenses Class Status Course Types Corporate Performance Standards Degrees Education Frequency Status Geographical Area Hiring Actions HR Recruiters HR Regions HR Regions Membership Type Menu Maintenance Organization Type Physical Demands Salary Grade Skills Trainers 1 Trainers 1 Trainer Evaluation Question 1 Trainer Evaluation Question 1 Trainer Evaluation Ratings User-Defined Log Types User-Defined Logs Work Environment 1 Log Ruider 🛅 Log Builder Default Filters Profile Change Request Approval Employee Maintenance HR Administration Action Maintena Employee Maintenance HR Administration Action Ma HR On Board Action HR Role Maintenance Prompt Maintenance UD Resumments HR Documents

Physical Demands are used to enter the physical requirements of a job classification. It is used in Job Classification creation.

Adding a New Physical Demand

To add a new Physical Demand, click on the [Add] button at the top of the screen. This will open up three new fields above the list of Physical Demands already defined.

The Code and Name are required fields but the Description is not. Enter the new information and then when done use the [Save] button. To exit Add Mode without saving any changes use the [Cancel] button.

Update or Delete an Existing Record

To update an existing record, select the record from the list by clicking on the code field. This will highlight the complete line and place the info into an area at the top of the list where the Name and Description can be changed.

Enter the new information and when done use the [Save] button. To exit Add Mode without saving any changes use the [Cancel] button. To delete the record, use the Delete Icon to remove the highlighted record.

Salary Grade

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Salary Grade Mai	ntenance		-		Sue C	hristensen's Profile Home
CM Manager			Salary Grade Ma	intenance		
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R CM Manager	Code		Description			Action
Position Control	M101	Management Level 1				×
Hiring Requisitions	M102	Management Level 2				×
🗄 🦲 Applicant Management	M103	Management Level 3				X
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🕀 🦲 Training	0102	Office Level 2				×
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Compensation Management File Maintenance			Salary Region Grade	Maintenance		
						New
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Education	Region	Min Amount	Max Amount	Currency	Effective Date	Action
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Salary Grades are used in conjunction with HR Regions, allowing the same salary grade to be different by physical region. This allows for the differences in pay scales between different regions of the country. Once salary grades have been defined, they can be applied to Job Classifications.

Salary Grades are also used in the Enterprise PY System.

The screen is split into two sections. The first is where the Salary Grade is defined, the 2nd matches regions and salary ranges to the salary grade.

Adding New Salary Grades

To add a Salary Grade use the **[Add]** button at the top of the screen. This will open up two new fields above the list of Salary Grades already defined.

Both fields the Code and Name are required fields. Enter the new information and then when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

Update or Delete an Existing Record

To update an existing record select the record from the list by clicking on the code field. This will highlight the complete line and place the info into an area at the top of the list where the Name can be changed.

Enter the new information and then when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

To delete the record, use the Delete Icon to remove the highlighted record.

Linking a Region to a Grade

To add a Region to an existing Salary Grade use the **[New]** button at the top of the region section of the screen. This will open up five new fields at the top of the region area.

All the fields are required fields. Enter the Region Code, the applicable salary range, the currency and the effect date of this salary range. Once done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

Skills

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Application Guestions	

Skills can be created either via HCM or via the Enterprise HR Module. This means that when this program is first entered, there may already be data defined if the Enterprise HR Module has been utilized in the past.

Skills are one of the attributes that can be applied to Job Classifications. For example an 'Administrative Assistant' Job Classification would probably have a skill requirement of Basic MS Office Skills.

When this program is first opened it will display all 'Skills' previously defined.

Adding New Skill

To add a new Skill use the [Add] button at the top of the screen. This will open up two new fields above the list of skills already defined.

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🗄 🦲 Applicant Management	TYPING	Typing Minimum 60 WPM	×
🗄 🎦 Workforce Planning	ADMINASST	Previous Experience in Admin	×
🕀 🦲 Training	PLUMBER	Plumber	×
Performance Management	MASONRY	Masonry - Brick	×
Ele Meistenene	MGMT	Managment Skills	×
	GENERAL	General Labor	×
	PROGRAM	Flach Drogrammer	*

Both fields the skill code and the skill description are required fields. Enter the new skill information and then when done use the [**Save**] button. To exit Add Mode without saving any changes use the [**Cancel**] button.

Update or Delete an Existing Skill

To update the description of an existing skill, select the skill from the list by clicking on the **Skill Code** field. This will highlight the complete line and place the info into an area at the top of the list where the Description can be edited. The code cannot be changed.

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	Skill Code	Skill Description	Delete
Position Control	MSAPPS	Worked with Microsoft Office	×
Hiring Requisitions	CMIC	Worked with CMiC Software	×
🗄 🦲 Applicant Management	TYPING	Typing Minimum 60 WPM	×
Workforce Planning	ADMINASST	Previous Experience in Admin	×
🕀 🦲 Training	PLUMBER	Plumber	×
Performance Management	MASONRY	Masonry - Brick	×
Elle Maintenance	MGMT	Managment Skills	×
	GENERAL	General Labor	×

Enter the new skill information and then when done use the [Save] button. To exit Add Mode without saving any changes use the [Cancel] button.

To delete the skill, instead of changing the description at the top of the screen use the Delete Icon to remove the highlighted record.

Trainers

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E Performance Management			
🗄 洒 Compensation Management			
🖻 🛅 File Maintenance			
Skills			
Degrees			
- Education			
Certifications and Licenses			
Hiring Actions			
Interesting trainer evaluation Ratings			

Trainers are used when building courses and creating classes. Trainers are not linked to employees directory, as a trainer may not be one of your employees. This allows trainers to be anyone, but it is still possible to track evaluations by trainer.

Adding New Trainers

To add a new record use the [Add] button at the top of the screen. This will open up two new fields above the list of actions already defined.

Both fields the Trainer Code and Name are required fields. Enter the new information and then when done use the [**Save**] button. To exit Add Mode without saving any changes use the [**Cance**] button.

Update or Delete an Existing Record

To update the description of an existing record select the record from the list by clicking on the code field. This will highlight the complete line and place the info into an area at the top of the list where the Name can be changed.

Enter the new information and then when done use the [Save] button. To exit Add Mode without saving any changes use the [Cancel] button.

Trainer Teams



Training Teams are used when building courses and creating classes. Training Teams can consist of any of the Trainers already defined.

Adding New Training Teams

To add a new record use the **[Add]** button at the top of the screen. This will open up two new fields above the list of actions already defined.

The Team Code and Team Name are required fields. Enter the new information and then when done use the [Save] button. To exit Add Mode without saving any changes use the [Cancel] button.

To add Trainers to a team, select a Team Code and then New. This will provide a list of Trainers. Choose the Trainers to be assigned to this Training Team and save.

Update or Delete an Existing Record

To update the description of an existing record select the record from the list by clicking on the code field. This will highlight the complete line and place the info into an area at the top of the list where the Name can be changed.

Enter the new information and then when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

Trainer Evaluation Ratings

🚰 Human Capital Management - Mi	crosoft Inter	net Explorer			_ 8 >
File Edit View Favorites Tool	s Help				Links » 🕅 🖣 🔹
Address a http://wintest2006.cmic.ca	1:7779/cmicoc4j	jtest2006/SdMenu/?app0	Iode=HR		💌 🄁 Go
Trainer Eval	uation l	Rating			Sue Christensen's Profile Home
¢ HCM Manager	<u>_</u>			Trainer Evaluation Rating	
Search	Go	Rating Value 🍡 2		Rating Description Below Average	
🖃 🍋 HCM Manager		Rating Value		Rating Description	Delete
🗄 🗀 Position Control	1	1	Poor		×
🕀 🦲 Hiring Requisitions		2	Below Average		×
🗄 🚞 Applicant Management	3	3	Average		X
Workforce Planning	4	4	Good		×
E Dational Management	4	5	Excellent		×
Compensation Management File Matricenance Skills Degrees Cutrifications and Licenses Hiring Actions Trainers Trainers Trainers					

Trainer Evaluation Ratings are utilized during the Trainer Evaluation process that is available to all attendees of a particular class. The Ratings are used in conjunction with Trainer Evaluation Questions.

Adding New Ratings

To add a new record use the **[Add]** button at the top of the screen. This will open up two new fields above the list of actions already defined.

Both fields the Rating Value and Description are required fields. Enter the new information and then when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

Update or Delete an Existing Record

To update the description of an existing record select the record from the list by clicking on the code field. This will highlight the complete line and place the info into an area at the top of the list where the Name can be changed.

Enter the new information and then when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

Trainer Evaluation Questions

🚰 Human Capital Management - Microsoft I	nternet Explore	ť				_ 8 >
File Edit View Favorites Tools Help					Links 🎽 🗍 📆	•
Address in http://wintest2006.cmic.ca:7779/cm	icoc4jtest2006/Sdf	/lenu/?appCode=Hk	२		•	🛃 Go
CMIC					Sue Christensen's Pro	ofile Home
Trainer Evaluatio	n Questi	ons			Check Spelling Sav	e Cancel
¢ HCM Manager	<u> </u>		HR	Trainer Evaluation Questions		-
Search Go	Display Order	•	Question			4
HCM Manager	Display Order			Question		Delete
🗄 🦲 Hiring Requisitions	1	Was the trainer kr	nowledgeable about the subj	ect matter?		×
🗄 🦲 Applicant Management	2	Was the course c	ontent delivered in a logical (order?		×
🗄 🗀 Workforce Planning						
🕀 🗀 Training						
Performance Management						
Compensation Management						
Education						
Certifications and Licenses						
Hiring Actions						
- Trainers						
Trainer Evaluation Ratings						
I rainer Evaluation Questions						

Trainer Evaluation Questions are the questions that class attendees will answer during the Trainer Evaluation process. These questions and their ratings are the evaluation data. As Evaluation Questions are applicable to all classes we recommend that the questions be generic in nature.

Adding New Questions

To add a new record use the **[Add]** button at the top of the screen. This will open up two new fields above the list of actions already defined.

Both fields the Display Order and Question are required fields. Enter the new information and then when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

Use the [Check Spelling] button to initiate Spell Checker on the Question field.

Update or Delete an Existing Record

To update an existing record select the record from the list by clicking on the code field. This will highlight the complete line and place the info into an area at the top of the list where the data can be changed.

Enter the new information and then when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

Work Environment

C				Demo Arrowsmith's Profile
Work Environme	ent Maintenan	ce		Save
Salary Surveys	*		Work Environment Maintenance	
Salary Increase	Code	Name	Description	4
er-Defined Logs	Code	Name	Description	Delete
Maintenance		Outeide All Seasons	Outeide All Sessone	X
Application Questions	STD OFF	Standard Office Env	Standard Office Environment	¥
Application Status	STD TDA	Standard Site Trailer	Standard Site Trailer Sevirenment	
And of Interest	STD-IKA	Standard Washawas Fau	Standard Westbaues Environment	
Attendee Status	510-1015	Standard Warehouse Env	Standard Warehouse Environment	~
Certifications and Licenses				
Class Status				
Course Types				
Corporate Performance Standards				
Degrees				
Education				
Frequency Status				
Geographical Area				
Hiring Actions				
HR Recruiters				
HR Regions				
Membership Type				
Organization Type	-			
Drganization Type Physical Demande				
Salany Grade				
Skills				
Trainers				
Training Teams				
Trainer Evaluation Questions				
Trainer Evaluation Ratings				
User-Defined Log Types				
User-Defined Logs	E			
Work Environment				
Log Builder				
Default Filters				
Profile Change Request Approval				
Employee Maintenance				
HR Administration Action Maintenand	DI			
HR Un Board Action				
Promot Maintenance				
HR Documents				
in pooniona	*			

Work Environment is used to enter the work environment of a job classification. It is used in Job Classification creation.

Adding a New Work Environment

To add a new Work Environment, click on the **[Add]** button at the top of the screen. This will open up three new fields above the list of Work Environments already defined.

The Code and Name are required fields but the Description is not. Enter the new information and then when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

Update or Delete an Existing Record

To update an existing record, select the record from the list by clicking on the code field. This will highlight the complete line and place the info into an area at the top of the list where the Name and Description can be changed.

Enter the new information and when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

Profile Change Request Approval

Ŷ	Human Capital Management												
	Job Classification Performance Stand Employee Performance Plans Noteble Incidents Interim Evaluations	erromance stand recePens Personal Information Change Request Approval									Clear Search		
	- Annual Evaluations				Personal I	nformation Chang	ge Request Appro	ival					
- ÷ (Compensation Management	Employee Number			Date On 💌					Request Type -Select-			
	Salary Planning	Request Create Date	Transaction No.	Request Description	Employee Number	First Name	Last Name	Request Effective Date	Comments	Submit Status	C Salact All		
	Salary Surveys					-				5	1 30000 Mil		
i è.	User-Defined Logs	Nov/18/2009	151	Profile	SS-MR-HK36	Fiona	Edwards	Nov/U4/2008		3	L		
	User Defined Opportunity View	Nov/18/2009	137	Skill	SS-WK-HR36	Fiona	Edwards	Jan/02/2006		S			
	- All Employee View No Security	Nov/18/2009	132	Education	SS-WK-HR37	Jessica	Lange	Nov/10/2009		S			
- -	File Maintenance	New/18/2009	121	Skil	SSJWKJHR37	Jessica	Lapre	New/03/2009		S			
	Application Questions									5	-		
	Application Status	Nov/18/2009	110	Profile	SS-WK-HR38	Sherry	Hubbard	Nov/09/2009		5			
	Applicant Balling	Nov/18/2009	107	Direct Deposit	595959	Suzette	Wetson	Nov/04/2009		s			
	Attendee Status	Nov/18/2009	99	Membership	595959	Suzette	Wetson	Nov/02/2009		S	П		
	- Certifications and Licenses	New/18/2009	97	Education	606060	Suzalla	Mateon	New/02/2009		s			
		101102005	51	Education	333333	Juzone	71063011	10110222005		-	-		
	- Course Types	Nov/18/2009	83	Skil	SS-WK-HR38	Sherry	Hubbard	Sep/01/2009	skills first change	5			
	- Corporate Performance Standards	Nov/18/2009	76	TD1	SS-WK-HR38	Sherry	Hubbard	Jan/01/3000		S			
	Degrees	Nov/18/2009	75	V44	SS-WK-HR38	Sherry	Hubbard	Jap 01/3000	comment for w4	s	—		
	Frequency Status	New#70009	62	Shill	SCETMO	Daver	Robinson			S			

Submitted Profile requests can be approved in this screen. Upon selecting an employee, the Approval screen is displayed.

Comments	
Personal information	Personal information
Last Name [®] Hubbard First Name [®] Sherry	Last Name [®] Hubbard First Name [®] Sherry
Middle Name Rose	Middle Name Rose
Prefix Title Ms. Suffix to Name S	Prefix Title Ms. Suffix to Name
Marital Status Single SSN (no space/hyphen) 529874615	Marital Status Single SSN (no space/hyphen) 529874615
Date of Birth 01011979	Date of Birth 01011979
Mailing Address	Mailing Address
Address Line 1 P.O Box 908	Address Line 1 P.O Box 908
Address Line 2 Clearwater	Address Line 2 Clearwater
Address Line 3 Buffalo	Address Line 3 Buffalo
ZIP 10001	ZIP 10001
Physical Address	Physical Address
Address Line 1 5 Wynter Lane	Address Line 1 5 Wynter Lane
Address Line 2 Suite 908	Address Line 2 Suite 908
Address Line 3 Brooklyn NY	Address Line 3 Brooklyn NY
ZIP 10001	ZIP 10001
City NY City State New York	City NY City State New York
Country United States of America	Country United States of America
Contact	Contact
Home Phone 2125552222-566 Home Fax 212 555-5555	Home Phone 2125552222-222 Home Fax 212 555-5555
Work Phone Work Fax	Work Phone Work Fax
Cell Phone (212) 555-8888 Pager	Cell Phone (212) 555-8888 Pager
E-Mail Address suzette.watson@cmic.ca	E-Mail Address[suzette.watson@cmic.ca
Attac	hment
	Uple
File Name Upload Date	Note Action
NO RECO	ras ruuna

Editing a Profile Request

To edit a profile request, use the **[Edit]** button at the top of the screen. This will make the Personal Information record on the left available for editing. Changes submitted on the Current Profile will be highlighted in orange on this screen. The Personal Information record on the right is the Current Profile and cannot be edited. Enter the changes and press **[Save]**. To exit Save Mode without saving use the **[Cancel]** button.

Approving and Rejecting Profile Requests

If the user has Approve and Reject privileges, then the Approve and Reject buttons will be available. To approve the Profile Information request, press the **[Approve]** button. The changed record will become the Current Profile and a new employment history record will be created in Payroll with the effective date specified on the record. The status on the changed record will be changed from Submitted to Approved in the Profile Information screen.

To reject a Profile Information request, press **[Reject].** The rejected record will be available for updates and re-submission in the Profile Request screen.

An attachment can be uploaded using the [Upload] button.

Employee Maintenance

Employee Self Service Maintanance											
	Employee Self Service Maintenance										
Employee Number		Fir	st Name		Last Na	me					
Employee Type -Select-		Payroll C	ompany	•	Payroll Departm	ent 📃					
Pay Group	Pay Group		Pay Run		Un	ion 📃					
Trade											
Employee No	First Name	Last Name	Company Code	Company		Access To Self Service E Select All					
1001	Glen	Marus	ZZ	CMIC ZZ Test Company		N					
121212	Jack	Report	ZZ	CMIC ZZ Test Company							
123456789	Andrea	Jones	ZZ	CMIC ZZ Test Company		N					
123456789012346	Beth	Adams	WH	Windsor-Harrison Connection		N					
123456789012348	Samuel	Jones	SS	SSConstruction Company							
123456789012355	Wayne	Brody	SS	SSConstruction Company							
123456789012359	Charlie	Lexington	SS	SSConstruction Company							
123456789012361	Berry	Lucas	SS	SSConstruction Company							
157469504	Morton	Kondkaakia	MT	M70006		E C					

Access to the HR Self Service application can be provided to employees in the Employee Maintenance screen. Use the search criteria at the top to select the employees that will be given access to HR Self Service. Check the Access to Self Service flag beside any employee that will be using HR Self Service. This is one of the steps required to set up an employee to use HR Self Service. When the employee registers for HR Self Service, an email is sent to the email address specified on the employee profile with a new PIN.

HR Role Maintenance



HR Roles for HR Self Service are defined in the HR Role Maintenance screen. The role that is assigned to the user must be set up on the user's contact code. This will determine the functions they can perform in HR Self Service.

Adding New Roles

To add a new record use the **[Add]** button at the top of the screen. This will open up two new fields above the list of actions already defined – Code and Description.

The Code field is a required field. Enter the new information and then when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

				Save Cancel				
HR Role Maintenance								
Code APPR	Descripti	ion Approver Role						
Select All Privileges 🔽								
Employee Profile		🗹 Empl	oyee Direct Deposit					
Employee Vacation Balance		🗹 Empl	oyee Pay Stub					
Object (🔽 Select All Objects)	View (🔽 Select All)	Edit (🔽 Select All)	Reject (🔽 Select All)	Approve (🔽 Select All)				
I Profile	V	N	V	Ā				
Fregency Contact		N	V	▼				
Direct Deposit		N	V	V				
🔽 Skills		N	V	▼				
F Education		N	V	▼				
Membership		N	V	▼				
		HR Roles						
Code	Delete							
DA	Database Administrator X							
APPR	Approver Role X							
SEMP	EMP Employee Role (View.Edit) X							

This screen is displayed after clicking on the Role code. The user can check the privileges and functions applicable to the role assigned to the user. When done, press the **[Save]** button. To exit Add mode without saving, press the **[Cancel]** button.

HR Documents

This can be used to define document folders to which document attachments can be uploaded. The user can indicate whether these attachments are available in the HR Documents tab of the Applicant screen.

The right-mouse click on any node will show the actions that can be performed:

	HR Documents
Document Root	
Certific Upload file Delete Resumes	
📄 resume2 🔽 Display Order For Applicant 📃 1	
🗋 resume1 🗖	
References	
reference1 🗹 Display Order For Applicant 3	

The check-box is used to indicate whether the document will be shown in the Applicant HR Documents screen or not, and the Display Order box is used to indicate the order in which the documents are displayed in the **HR Documents** tab of the Applicant screen.

Applicants													
후 🗐 🗐 🛛 HCM Manager 💆][A	Applicant: Se	emus Merrick									*
Search Go		General Pe	ersonal	Miscellaneous	Att	tributes	Emp.History	Attachments	References	Notes	Application History	HR Documents	
🖃 🗁 HCM Manager				Name						Descrip	tion		
Position Control	ľ	picture-upload2						upload of picture-2					
Hiring Requisitions		doc1						doc1					
🖻 🦳 Applicant Management		mydoc2						my document - #2					
Applicant Self-Service		submission 1						resume					
E C Applicants		maint1						maint1					
Semus A. Merrick													
Hired Applicants													

The documents are shown in a display-only mode of the Forms Request node in Employee Self Service:

Employee Self Ser	vice	
🕯 🗐 🖳 Employee Self Service 🗖	HR Documents	*
Search Go Personal Information Personal Information Personal Administration Corporate Learning Corporate Learning Corporate Information Compary terning Compary terning Compar	Decument Root Takesforever Employee Docs submission 1 TrtYAGAN H Ranges H Ranges H Ranges Ranget - 01	

Employee Request Log

nagement						Show Filter	Send To Spreadsheet	Enter Query
			Employee Request					l i
Transaction No	Request Description	Employee No	Employee Name	Creation Date	Detail Information		Number of request	s
564	Skil	595959	Suzette Watson	Apr/08/2011		1		
248	Profile	SS-WK-HR38	Sherry Hubbard	Sep/09/2010		1		
249	Profile	SS-WK-SAL44	Natalie Steeles	Sep/10/2010		1		
377	Skil	SS-WK-SAL44	Natalie Steeles	Nov/12/2010		1		
264	Profile	SS-WK-SAL38	Mickey Rooney	Sep/21/2010		1		
435	Membership	SS-WK-SAL49	Julian Brighton	Nov/16/2010		1		
426	Education	SS-WK-SAL49	Julian Brighton	Nov/16/2010		1		
293	Profile	SS-WK-SAL52	Josh Brown	Nov/08/2010		1		
224	Profile	SS-WK-HR37	Jessica Lange	Sep/01/2010		1		
383	Emergency Contact	SS-WK-SAL50	Jack Shaw	Nov/12/2010		1		
281	Profile	SS-WK-SAL40	Hazel Patton	Nov/04/2010		1		
573	Profile	SSEMPPER2	Harry Perry	Apr/21/2011		1		
235	Profile Under Review	SS-WK-HR36	Fiona Edwards	Sep/08/2010		1		
516	TD1	SS-WK-SAL26	Ella Brown	Mar/01/2011		1		
265	Profile	SS-WK-SAL46	Elizabeth Rivers	Sep/21/2010		1		
299	W4	SS-WK-SAL30	Ed Knight	Nov/09/2010		1		
266	Profile	SS-WK-SAL35	Darrell Manson	Sep/21/2010		1		
454	Emergency Contact	SS-WK-SAL47	Alfred Jonas	Nov/18/2010		1		
246	Profile	SS-WK-SAL45	Abigail Shields	Sep/09/2010		1		
Total (19 rows)								

The Employee Request Log displays all submitted requests except Open Enrollment requests. The user can only see requests for objects that the user has access to in HR Role Maintenance.

Employee Self Service Control

		Save
	Employee Self-Se	rvice Setup
Profile	Enable Workflow	
W4	Enable Workflow	
Contact	Enable Workflow	
Skills	Auto Approval	Enable Workflow
Certificate/License	Auto Approval	Enable Workflow
Education	Auto Approval	Enable Workflow
Membership	Auto Approval	Enable Workflow

In this screen the user puts setups for Employee Self Service Control.

Performance Plan Type

tenance				Add
		Performance Plan Types		
Code	Name	Description	Term	Action
MONTHLY	Monthly Plan	Monthly Plan	Monthly	×
YEARLY	Yearly Plan	Yearly Plan	Yearly	×

In this screen user adds /deletes Performance Plans Types for Performance Management program.

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