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Reference Guide

# Human Capital Management v10x

By CMiC

**CMiC**  
*Computer Methods*  
*international Corp.*

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**Computer Methods International Corp.**

4850 Keele Street

Toronto, Ontario M3J 3K1

Canada

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# Human Capital Management

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## 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

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



# Position Control

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## 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 Classification 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.

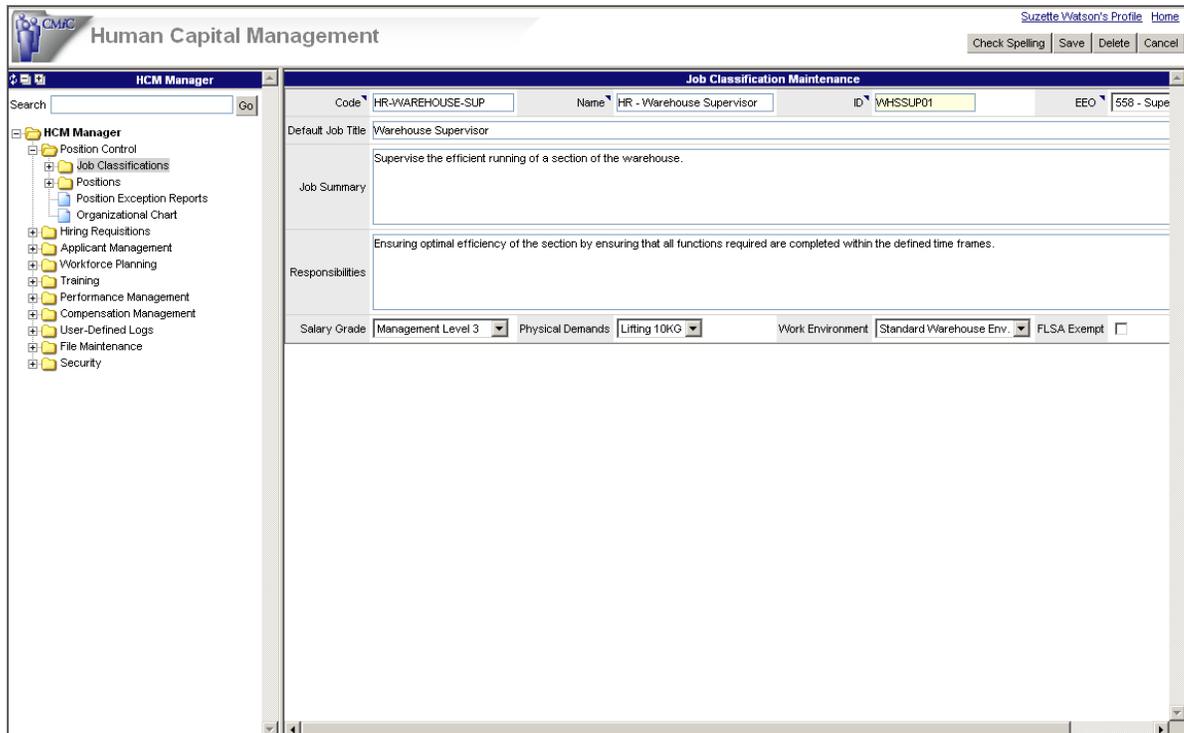
The job summary, responsibilities, salary grade and the FLSA exempt status are defaulted to each position created for the classification where they can be adjusted to fit the exact position.

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.

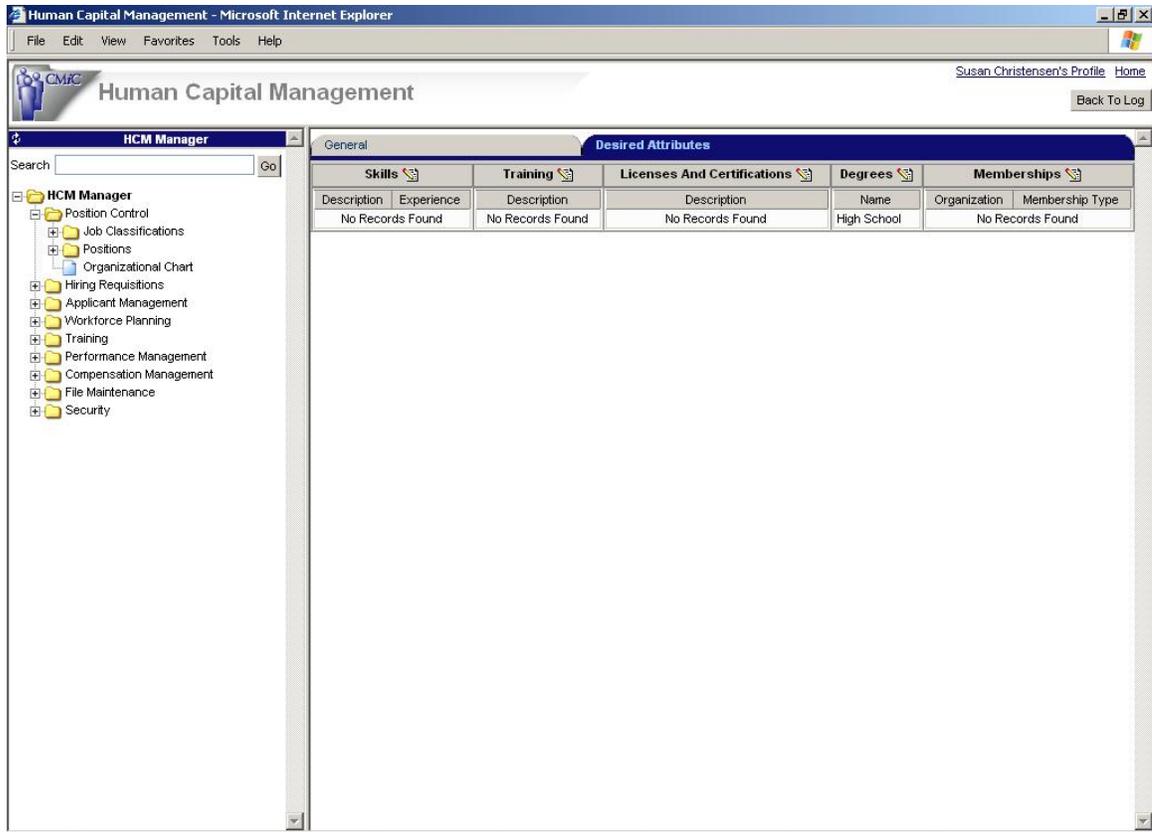


Once the job classification has been created by using the **[Save]** button attributes can be added.

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.



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 - Microsoft Internet Explorer

OK Cancel

List of Licenses and Certifications					
Code	Description	State	Lisence Status	<input type="checkbox"/> Required	<input type="checkbox"/> Select
1000	Electrician 1st Class	▲	Valid ▼	<input type="checkbox"/>	<input type="checkbox"/>
2000	Gas Fitter - Ontario	▲	Valid ▼	<input type="checkbox"/>	<input type="checkbox"/>
CPR	CPR Life Saving Certificate	▲	Valid ▼	<input type="checkbox"/>	<input type="checkbox"/>
G-LICENSE	General Driver License	▲	Valid ▼	<input type="checkbox"/>	<input type="checkbox"/>
Z	Air Brakes Certification	▲	Valid ▼	<input type="checkbox"/>	<input type="checkbox"/>

**Pre-Requisites:**

**Mandatory:** Nothing

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

# Positions

The screenshot displays the 'HR Positions' interface in a Microsoft Internet Explorer browser. The main window is titled 'Human Capital Management - Microsoft Internet Explorer'. The interface is divided into several sections:

- Navigation Tree (Left):** A tree view under 'HCM Manager' showing various modules like Position Control, Job Classifications, Positions, Hiring Requisitions, Applicant Management, Workforce Planning, Training, Performance Management, and Compensation Management.
- Search Bar:** A search field with a 'Go' button.
- Position Details Tab:** The active tab showing the following information:
  - Position ID: VMGR-1003
  - Status: Filled
  - Position Name: Warehouse Manager - Dept 1003
  - Job Classification: HR - Warehouse Manager
  - Job Summary: Warehouse Manager
  - Employee: Patrick Peterson
  - Effective Date: Nov 01 2005
  - Job Title: Warehouse Manager - Dallas
  - Expiry Date: (empty)
  - Reports To: Regional Distribution Manager - North We
  - FLSA Exempt:
  - Salary Grade: Manager Grade
  - Region: US Mid-West
  - Responsibilities: Warehouse safety, Warehouse staffing, Warehouse shipping statistics
- History Tab:** A tab for viewing the history of changes to this position.

## *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.

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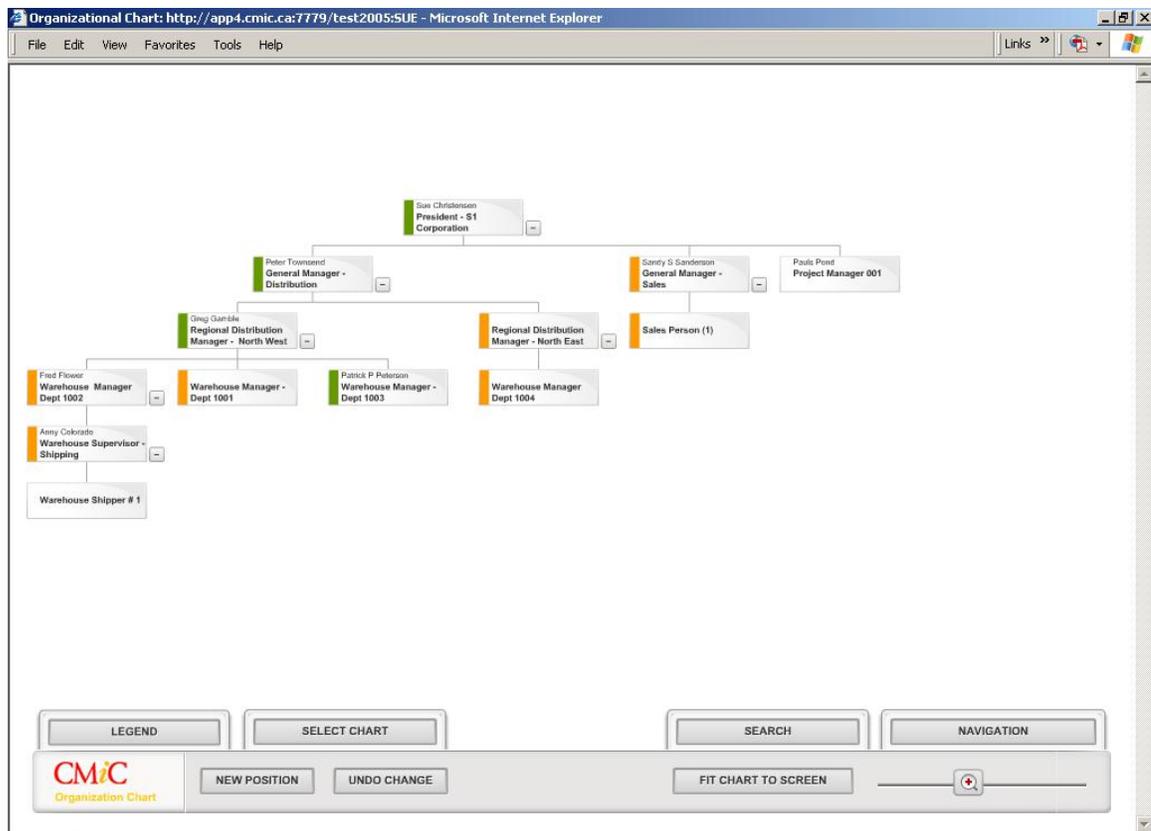
## Organizational Chart

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:**

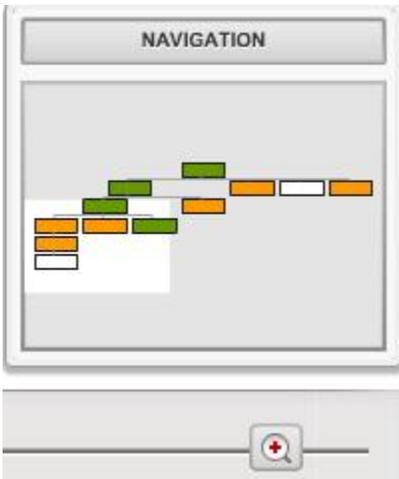
**Mandatory:** Job Classifications

**Optional:** Positions, Regions



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.



### 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.

The screenshot shows a 'Position' form with the following fields and values:

- Position: General Manager - Sales
- Position Code: MGR-SALES
- Reports To: President - S1 Corporation (429377): Chi
- Classification: HR-MANAGER-1
- Region: US North West
- Effective Date: MM / DD / YYYY
- Expires: MM / DD / YYYY
- Employee Name: Sanderson, Sandy S (ZZ-900)
- Status: Pending

Buttons at the bottom: SAVE, DELETE, CREATE DIRECT REPORT, CANCEL.

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] [Cancel]

**HCM Manager**

Search [ ] Go

**HCM Manager**

- Position Control
- Hiring Requisitions
  - Requisitions
    - R-DRYWAL
    - Requisition Activity
    - Requisition Status Report
    - Recruiter Requisition Activity
- Applicant Management
- Workforce Planning
- Training
- Performance Management
- Compensation Management
- User-Defined Logs
- File Maintenance
- Security

**General** | Desired Attributes | Actions

Requisition ID: R-DRYWAL | Date: 05/06/2008

Requested By: J. Thomas | Proposed Hire Date: 05/06/2008

Job Classification: Drywallers | Status: Active

Position Name: Drywallers | Type:  Addition  Replacement

Hiring Office: California | Recruiter: E. Phillipson

Requestion Name: Drywallers Requisition |  Full Time  Part Time  Temporary

**Job Description:** Apply plasterboard or other wallboard to ceilings and interior walls of buildings.

**Responsibilities:** Trim rough edges from wallboard to maintain even joints, using knife. Install blanket insulation between studs and tack plastic moisture barrier over insulation. Fit and fasten wallboard or sheetrock into specified position, using hand tools, portable power tools, or adhesive. Read blueprints and other specifications to determine method of installation, work procedures, and material and tool requirements.

**Notes:**

*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** | System Options

**System Options**

General | Database Options | Reports | Financials | Projects | Assets | Payroll

Default 1099 Code: 1 | 1099 Misc Rents

Default Vendor Class: OTH | Other/Misc

Priority From: [ ] To: [ ]

Generate Timesheet Utility for: E-Timesheet

Payroll/HR Auto Numbering |  Add Hourly Premium to Zero Amount/Not Found Rate

Apply Company Security in Payroll |  JSP Position ID Auto Numbering

E-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

Action Name	Cost Amount	Status	Notes	Action Date	From Date	To Date	Action taken by	Action
Requisition Created		COMPLETED	Requisition Created	05052008			HR	X
Placed Advertisement	250.00	PENDING	Advertisement placed.	05052008	05052008	05152008	J. Thomas	X

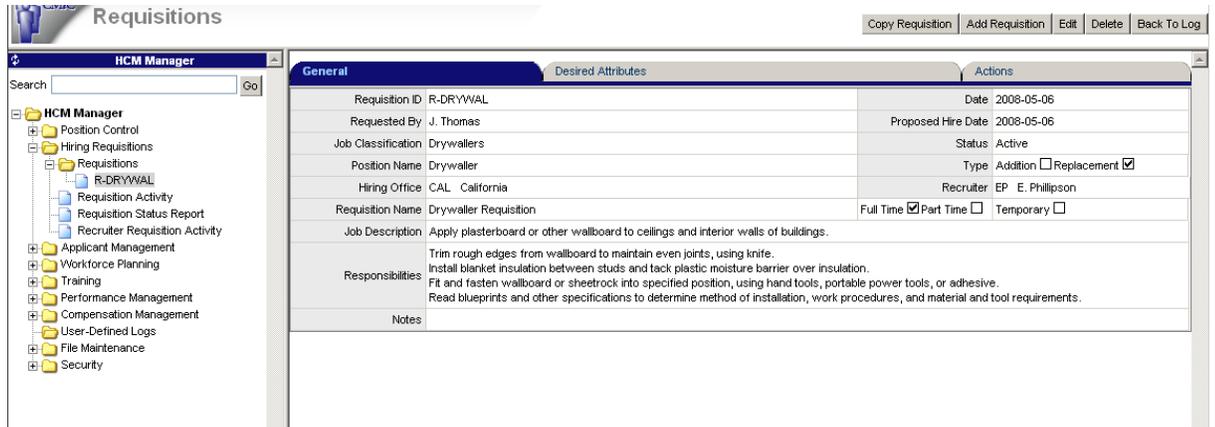
The Actions tab allows the user to update the history of what has happened to the requisition. This is the same functionality that is available via the Requisition Activity screen. When a new requisition is saved, an Action of "Requisition Created" is automatically created for the requisition.

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

**Pre-Requisites:**

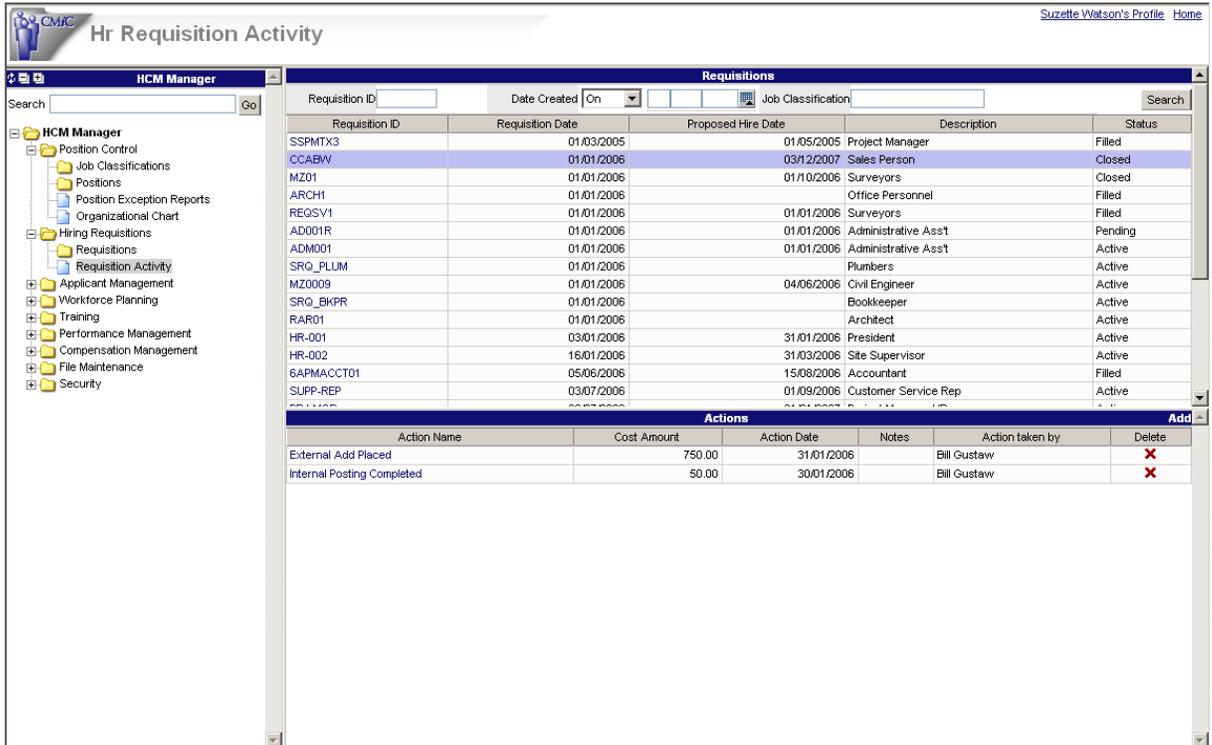
**Mandatory:** Action Name, Action Date.

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



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



### 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.

Action Name	Cost Amount	Status	Notes	Action Date	From Date	To Date	Action taken by	Delete
External Ad Placed	50	Pending	Need a new PM	01-01-2012	01-02-2012			

- 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.

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 <input type="checkbox"/> Select All
EC	East Coast USA	Accountant	0	<input checked="" type="checkbox"/>
MDWES	Midwest USE		0	<input type="checkbox"/>
NORTHW	Northwest USA		0	<input type="checkbox"/>
SOUTH	South USA		0	<input type="checkbox"/>
USNE	US North East		0	<input type="checkbox"/>
WC	West Coast USA		0	<input type="checkbox"/>

## Recruiter Requisition Activity

**Recruiter Requisitions Activity**

**Recruiters**

Recruiter Name	Recruiter Code
E. Phillipson	EP
J. Drake	JD
K. Heigel	KH

**Requisitions**

Requisition Code	Job Classification	Requested By	Date	Proposed Job Title	Proposed Hire Date	Hiring Office	Status
R-DRYWAL	Drywallers	J. Thomas	2008-05-06	Drywall Requestion	2008-05-06	California	Active

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.

**Transfer Requisitions**

From Recruiter: E. Phillipson

To Recruiter: K. Heigel

Transfer Cancel

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

The screenshot shows a web application interface for an applicant. At the top, there is a header with the text "Applicant:" and two buttons: "Save" and "Cancel". Below this is a navigation bar with tabs for "General", "Education", "Skills", "License/Certificate", "Training", "Membership", "Employment", "References", "Additional Information", and "Application History". The "General" tab is selected. The form contains several sections: "Position you are applying for" with a dropdown menu, radio buttons for "Full Time" (selected) and "Part Time", and a checkbox for "Temporary"; "Salary Desired" with a text input and a dropdown for "Pay Period"; "Requisition Number" with a dropdown; "Personal" information including "First Name", "Last Name", "SSN", "E-Mail Address" (pre-filled with "Rob@yoohoo.com"), "Home Phone", "Work Phone", "Street", "City, State", "Country", "Suite", "ZIP/Postal Code", "Source of Applicant", "Gender", "Application Date", and "Ethnicity/Race"; "Area Of Interest" with checkboxes for "Administration", "Architecture and Planning", "Carpentry", "Electrical", "Financials Position", "HVAC Specialization", "Project Management", and "Supervisor", plus an "Other" text input; and "Geographical Area" with checkboxes for "East Coast USA", "Midwest USE", "Northwest USA", "South USA", "US North East", and "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

The screenshot shows a "Sign In" page with a light blue background. The title "Sign In" is centered at the top. Below it are two text input fields: "Applicant's e-mail address:" and "Enter Password:". To the right of the password field are two buttons: "Sign In" and "Forgot Password?". At the bottom left, there is a link that says "Register New User".

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 [Register New User](#) 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

*ENVIRONMENT* = 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 Timmins Save Cancel

Position you are applying for: 

 Full Time
  Part Time
  Temporary

Salary Desired:  --Select Pay Period-- 
Requisition Number:

**Personal**

First Name: 
Last Name:

SSN (no space/hyphen): 
E-Mail Address:

Home Phone: 
Work Phone:

Street: 
Suite:

City, State: 
ZIP/Postal Code:

Country: 
Application Date:

Source of Applicant: 
Ethnicity/Race:

Gender:

**Area Of Interest**

Area Of Interest:
  Administration
  Architecture and Planning
  Carpentry
  Electrical
  Financials Position
  HVAC Specialization

Project Management
  Supervisor
 Other:

**Geographical Area**

Geographical Area:
  East Coast USA
  Midwest USE
  Northwest 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** drop-down 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.

Applicant: Timmy Timmins

Application Code	Job Classification Code	Description	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

**Applicants** [Save] [Cancel]

Applicant: Donna Johnson

**General** | Personal | Miscellaneous | Attributes | Emp. History | Attachments | References | Application History

Source of Applicant: Chicago Sun Times | Application Date: 2007-10-15

Number: 663280 | Last Modified Date: 2007-10-15

Last Name: Johnson | First Name: Donna

Middle Name: | Employed As: |

SSN (no space/hyphen): 581701337 | Status: Open

**Mailing Address**

Address 1: 10 Ridge Avenue | Address 2: |

Address 3: | ZIP: 60609

**Physical Address**

Address 1: 10 Ridge Avenue | Address 2: |

Address 3: | ZIP: |

Country: United States of America | State: IL

County: | City: CHI

**Contact**

Home Phone: (312) 555-2099 | Work Phone: (312) 555-2310

Cell Phone: (312) 555-7341 | Pager: |

Home Fax: | Work Fax: |

E-Mail Address: djohnson@hr.com

**Area Of Interest**

Area Of Interest: Administration  Architecture and Planning  Carpentry  Project Management  Supervisor

Other: |

**Geographical Area**

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.

Applicant: Lisa Rolands

General	Personal	Miscellaneous	Attributes	Emp. History	Attachments	References	Application History
	Gender: Male					Ethnicity: Unknown	
	Military Status: Not veteran					Marital Status: Single	
	Resident Status: Citizen					Dominant Hand: Right Handed	
	Date of Birth:					Place of Birth:	
	Disability:						
	Able to Travel: No					Distance:	

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.

Applicant: Lisa Rolands

General	Personal	Miscellaneous	Attributes	Emp. History	Attachments	References	Application History
		Type: Salaried					
		Referring Employee: Mark Franklin				Preferred Language: English	
		Expected Hourly Rate:				Expected Salary: 30000 Per Year	
		Date Available: 2007-03-01				Application Location: Chicago	

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.

The screenshot shows the 'Applicants' system interface. The main content area is titled 'Applicant: Lisa Rolands' and has several tabs: General, Personal, Miscellaneous, **Attributes**, Emp. History, Attachments, References, and Application History. The 'Attributes' tab is active and contains five sub-tables:

Skills		Training		Licenses And Certifications		Education		Memberships	
Description	Experience	Description		Description		Name	Organization	Membership Type	
Cabling and Wiring	24	Air Brakes Operations		Air Brakes		Associates Degree	Erindale SS	Lifetime	
Plastering	20	Computers 101		Red Cross CPR Certification			Ryerson Polytechnical Institut	Lifetime	
Tile and Terrazzo Cutting	24						Silver Creek	Annual	
							Credit Woodlands HS	Annual	

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 - Microsoft Internet Explorer

OK Cancel

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

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

Suzette Watson's Profile Home Save Cancel

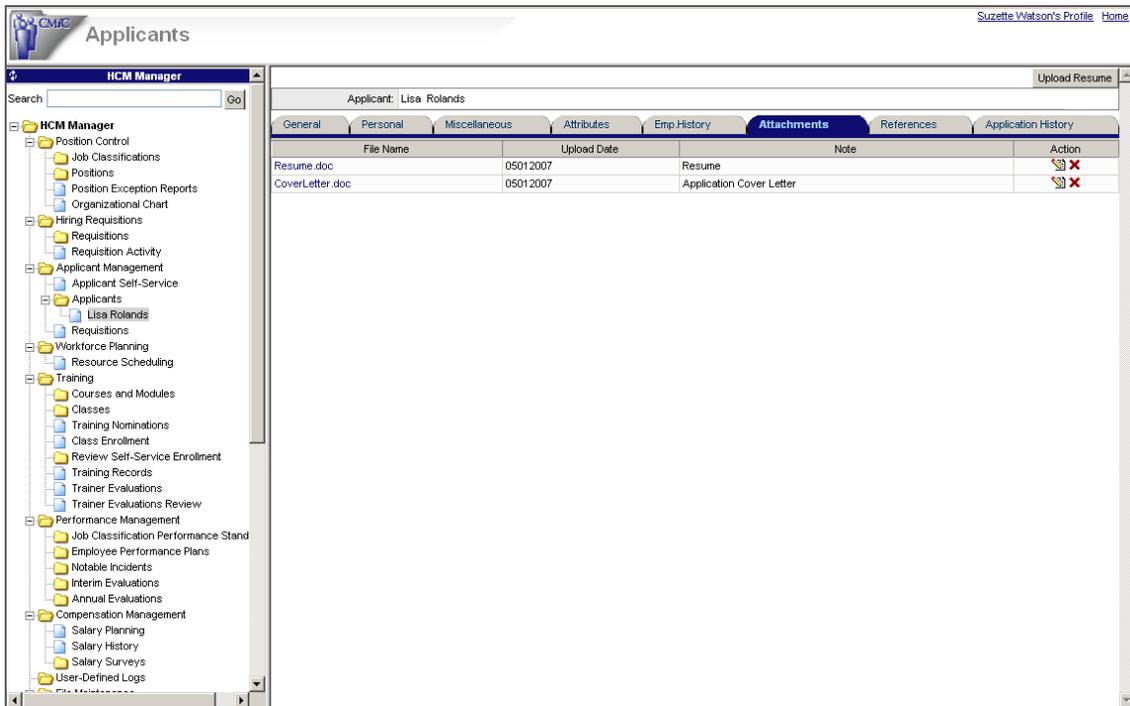
Applicant: Lisa Rolands

General Personal Miscellaneous Attributes **Emp.History** Attachments References Application History

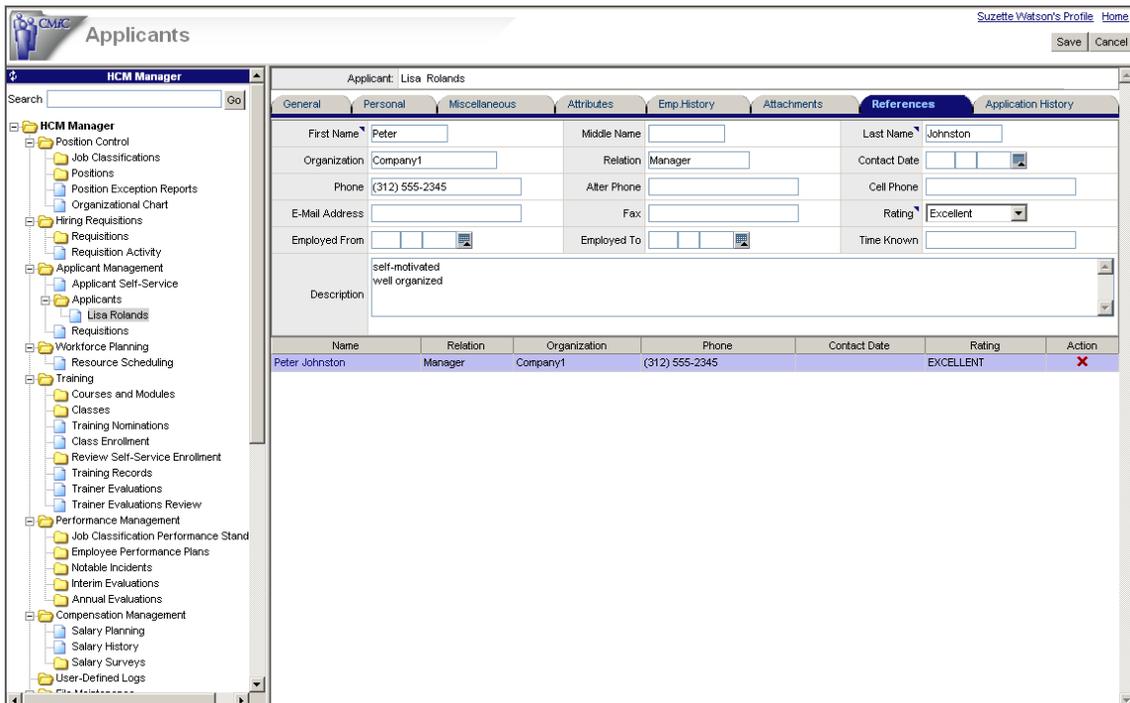
Company Name	Company2	Start Date	02 15 2003	End Date	12 01 2005
Street	23 Palisade Road	City State	Chicago, IL		
Phone Number	(312) 555-6122	Job Title	Project Accountant	Supervisor Name	
Starting Wage	27	Final Wage	29	Pay Rate Period	Hourly
Leave reason	Company closed				

Company	Job Title	Start Date	End Date	Leave Reason	Action
Company1	Accountant	01012002	02012003	Contract ended	<input checked="" type="checkbox"/>
Company2	Project Accountant	02152003	12012005	Company closed	<input checked="" type="checkbox"/>

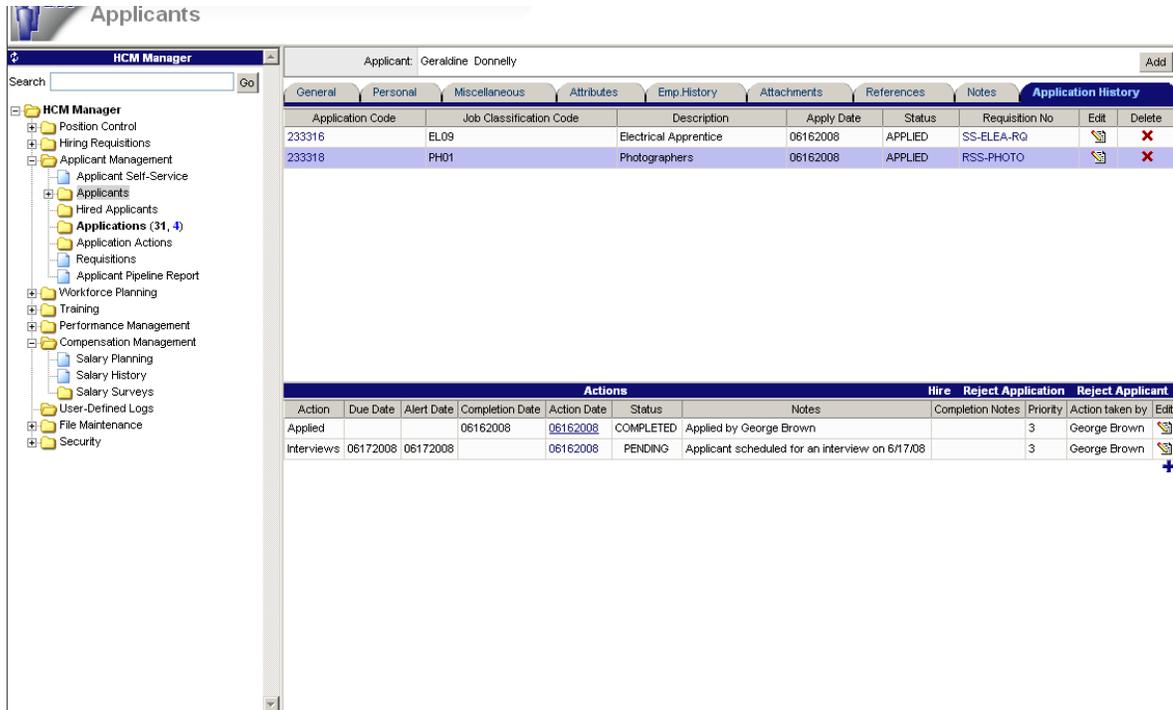
The **Employment History** tab starts with a log view. To view the details of a specific employment record click on the linked field.



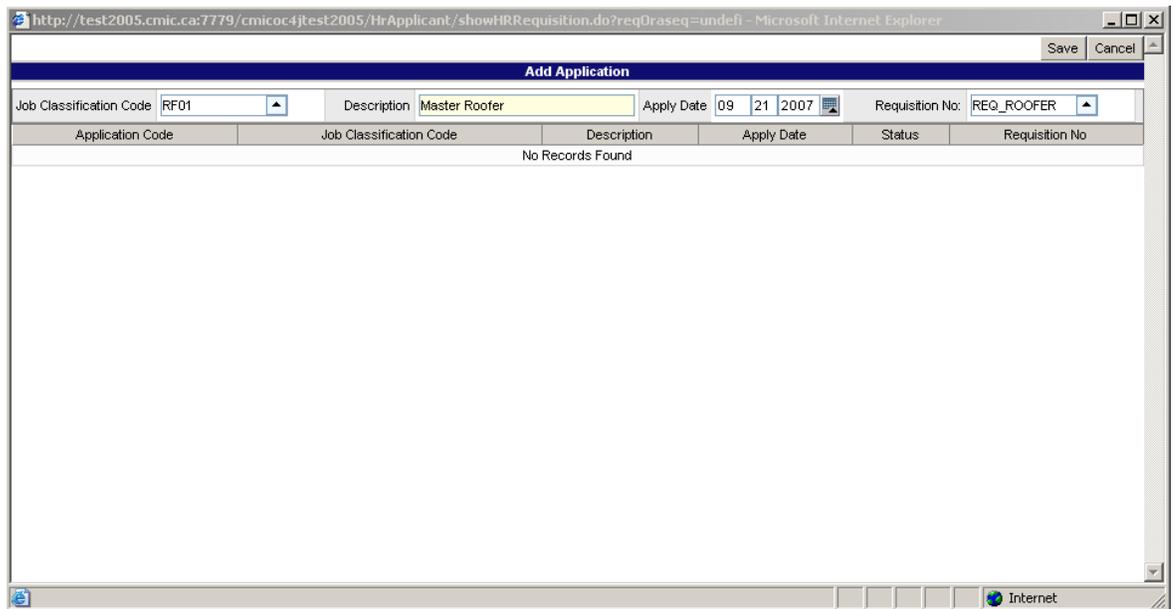
The **Attachments** tab may contain any number of documents uploaded by the applicant. To open one of the documents just click on the linked field name.



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.



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.



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.

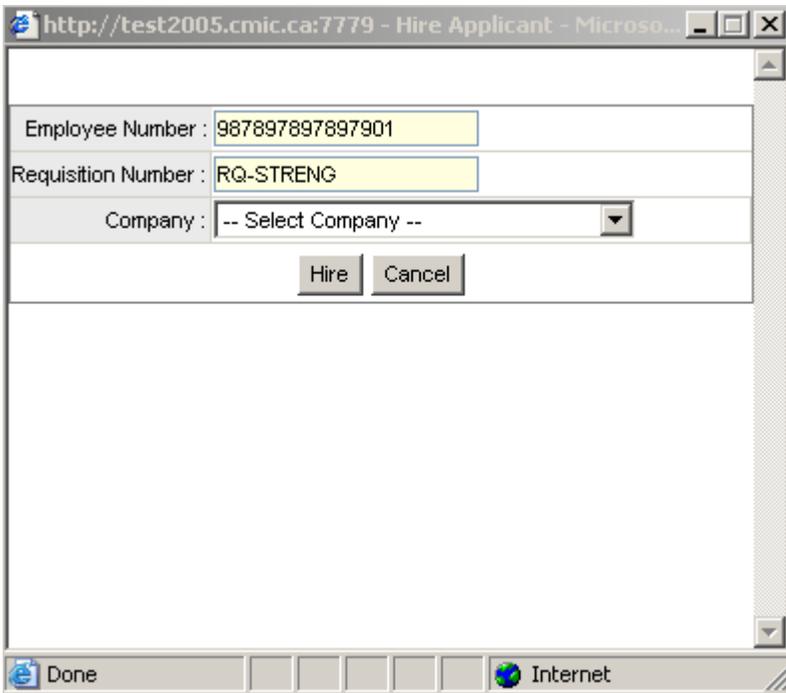
The **[Hire]** link changes the applicant’s status to Hiring Pending and the applicant’s record is added to the Hired Applicants list of applicants. The Requisition Status is updated to “Hiring in Progress”. The **[Reject Application]** link changes the status of the application to Rejected and the applicant’s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

## Hired Applicants

The screenshot shows the HCM Manager interface. The left-hand navigation pane is expanded to 'Hired Applicants'. The main content area displays a table with the following data:

Applicant #	Applicant Name	Rehire
2005-14@cmic.ca	Taylor Crane	N
206182	Pauline Long	N
206469	Bill Brady	N
209916	Fred Sanderson	Y
210933	Devon Walter	Y
211020	Melissa Wellington	Y
211869	Laura Fanning	Y
211917	Melinda Chesney	Y
214650	Emerald Bridget	N
<b>Total (9 rows)</b>		

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’.



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:7779 - Applicants - Microsoft Internet Explorer

Employee: Nancy Craft      Employee Number: 987897897897901      Save    Cancel

**Personal**    Company    Rates/Salary    Address    Tax    HR Info    Security

First Name: Nancy      Last Name: Craft

Initial: A.      Alias:     

Prefix:      Suffix:     

SIN/SSN: 267458900      Type: Salaried

Status: Active      Work Status: Working

Allow Accrued Leave:

Unionized:       Union Membership Date:     

Union No:     

Union Mem No:      Pension Reg No:     

Position Description:     

Place of Birth:     

Date of Birth: 09 23 1965

Hire Date: 01 15 2008      Seniority Date:      Work Days/Year: 260

Terminate Date:      Next Review Date:      Hours/Year: 2080

Rehire Date:      Adjusted Service Date:      Service/Years:     

Date Deceased:     

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

agement      Show Filter    Send To Spreadsheet    Enter Query

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
<b>Total (11 rows)</b>				

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

Human Capital Management Add Applicant Show Filter Send To Spreadsheet Enter Query

HCM Manager		Applicant Information																						
Applicant #	Applicant Name	Apply Date	Sin No	Employee #	Applicant Status	Status Code	Status Desc	Mailing Address 1	Mailing Address 2	Mailing Address 3	Mailing Zip Code	County Code	County Name	State Code	State Name	County Code	County Name	City Code	Physical Address 1	Physical Address 2	Physical Address 3	Physical Zip Code	Reside Lat/lon	
1	Darren Billings	21/Sep/2009	565456556		Hired	LVL1PASS	Level One Pass	22			12456	US	United States of America	NY								12456		
1044212	Roy Collins	28/Jan/2010	618294820		Hired			2350 Hunt Street			60601	US	United States of America	IL	Illinois									
1044213	Jeff Parker	01/Oct/2010	564738292		Application Pending			10 Ross Road		Mount Pleasant	60609	US	United States of America	L	Illinois				10 Ross Road		Mount Pleasant	60609		
1044214	Jeremy Fred Forrester	18/Nov/2010	102938475	1044214	Hired			45 Burberry Lane		Manhattan	10002	US	United States of America	NY	New York									
1044215	Ronald McKense	18/Nov/2010	981728374		Application Pending			6 Fairweather Road		Suite 20	10001	US	United States of America	NY	New York									
1044216	Franklin Hardy	04/Mar/2011	621510555		Application Pending							US	United States of America										10001	
1044217	Antonio Banderas	14/Mar/2011	801235400	1044217	Hired																			
1044218	Stanley Roper	14/Mar/2011	659801279		Application Pending																			
1044219	Lester Brooks	15/Mar/2011	328059001	1044219	Hired																			
1044220	Jared Cooper	29/Mar/2011	265987012	1044220	Hired																			
1044221	Daniel Rock	31/Mar/2011	598701214	1044221	Hired																			
1044224	Dallas McLean	15/Jul/2011	463979737		Application Pending			123456 Dept Length		Chicago, Illinois	60601	US	United States of America	L	Illinois									
1044225	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

Application Action												
Applicant No	Name	Date	Job Classification Code	Job Classification	Requisition Number	Applicant Note	Action Code	Priority	Action Note	Status Code	Hiring Office	Requisition ID
1044214	Jeremy Forrester	18-11-2010	372	Draftsman	246896		HIRED	3	Hired by Database Administrator	COMPLETED	EC, USNE	SWC-DRFTRQ
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		000000001
1044217	Antonio Banderas	14-03-2011	326	Photographers	2434768		HIRED		Hired by Suzette Watson	COMPLETED		000000001
1044219	Lester Brooks	15-03-2011	1412	Accountant	2434986		HIRED		Hired by Suzette Watson	COMPLETED		000000002
1044219	Lester Brooks	15-03-2011	1412	Accountant	2434986		APPLIED	3	Applied by Suzette Watson	COMPLETED		000000002
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
1044224	Dallas McLean	15-07-2011	4713	Payroll Clerk	2507064		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
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
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
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		000000008
74859673	Naz Clark	08-11-2011	1634	Industrial Engineer	2597811		APPL-OFFER	3		PENDING		000000008
74859673	Naz Clark	08-11-2011	1634	Industrial Engineer	2597811		HIRED		Hired by Ludmila Goldstein	COMPLETED		000000008
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
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
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		000000009

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

Applicant: Jeremy Forrester

General	Personal	Miscellaneous	Attributes	Emp.History	Attachments	References	Notes	Application History	HR Documents
Application Code	Job Classification Code	Description	Apply Date	Status	Requisition No	Edit	Delete		
246898	372	Draftsman	18-11-2010	HRED	SWC-DRFTRQ				

Action	Due Date	Alert Date	Completion Date	Action Date	Status	Notes	Completion Notes	Priority	Action taken by	Edit
Hired	31-10-2011		31-10-2011	31-10-2011	COMPLETED	Hired by Database Administrator	Employee is hired through HCM	3	Database Administrator	
Applied			31-10-2011	18-11-2010	COMPLETED	Applied by Suzette Watson		3	Suzette Watson	

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 Documents
Application Code	Job Classification Code	Description	Apply Date	Status	Requisition No	Edit	Delete		
246898	372	Draftsman	18-11-2010	HRED	SWC-DRFTRQ				

Action	Due Date	Alert Date	Completion Date	Action Date	Status	Notes	Completion Notes	Priority	Action taken by	Edit
Hired	31-10-2011		31-10-2011	31-10-2011	COMPLETED	Hired by Database Administrator	Employee is hired through HCM	3	Database Administrator	
Applied			31-10-2011	18-11-2010	COMPLETED	Applied by Suzette Watson		3	Suzette Watson	

## Requisitions

Requisition ID	Date	Description	Status	Hiring Office	Action
SWC-SURV	01-01-2010	Surveyors	Pending	US North East	<a href="#">View details</a>
SWC-PMRQ	01-11-2010	Project Manager	Hiring In Progress	Midwest USE	<a href="#">View details</a>
SWC-DRFTRQ	02-11-2010	Draftsman	Filed	US North East	<a href="#">View details</a>
0000000007	07-02-2011	Management Analyst	Active	East Coast USA	<a href="#">View details</a>
0000000006	04-07-2011	Payroll Clerk	Hiring In Progress		<a href="#">View details</a>
0000000005	04-07-2011	Payroll Clerk	Hiring In Progress		<a href="#">View details</a>
0000000008	02-11-2011	Industrial Engineer	Filed		<a href="#">View details</a>
0000000011	01-01-2012	Accountant	Pending	West Coast USA	<a href="#">View details</a>
0000000004		Carpenter	Filed		<a href="#">View details</a>
0000000003		Senior Level Manager	Filed	East Coast USA	<a href="#">View details</a>
0000000010		Management Analyst	Pending		<a href="#">View details</a>
0000000002		Accountant	Filed	East Coast USA	<a href="#">View details</a>
0000000009		Accountant	Hiring In Progress		<a href="#">View details</a>
0000000001		Photographers	Filed	Northwest USA	<a href="#">View details</a>

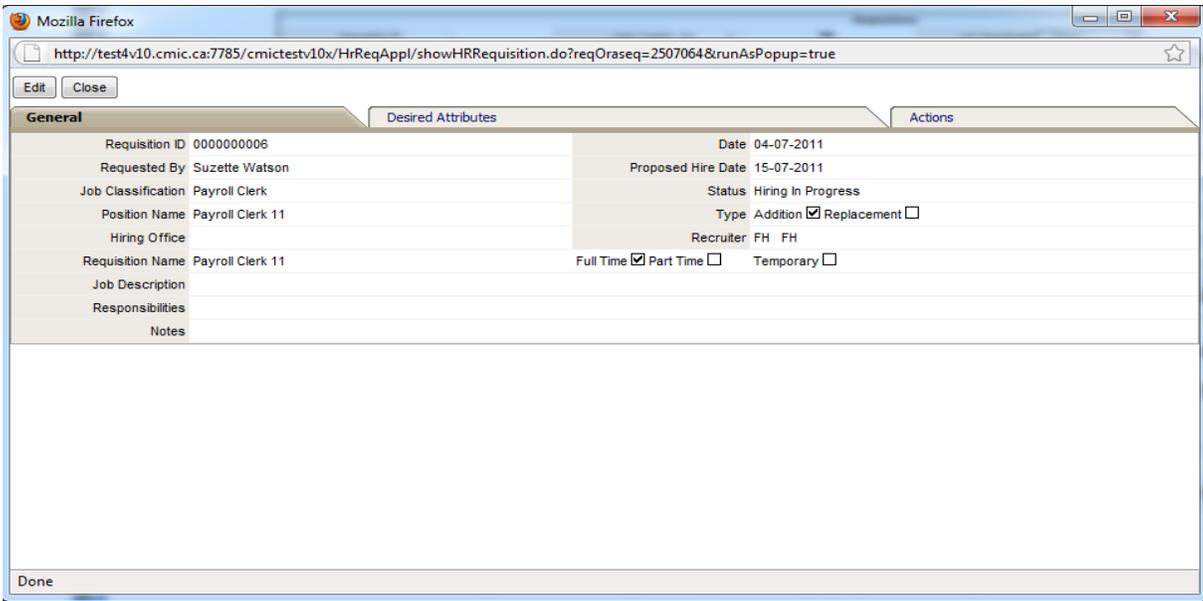
Applicant ID	First Name	Last Name	% of Required Qualifications	% of Desired Qualifications	Action
1044226	West	Jeremy	100.0%	100.0%	<a href="#">Search Qualified Applicants</a>

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

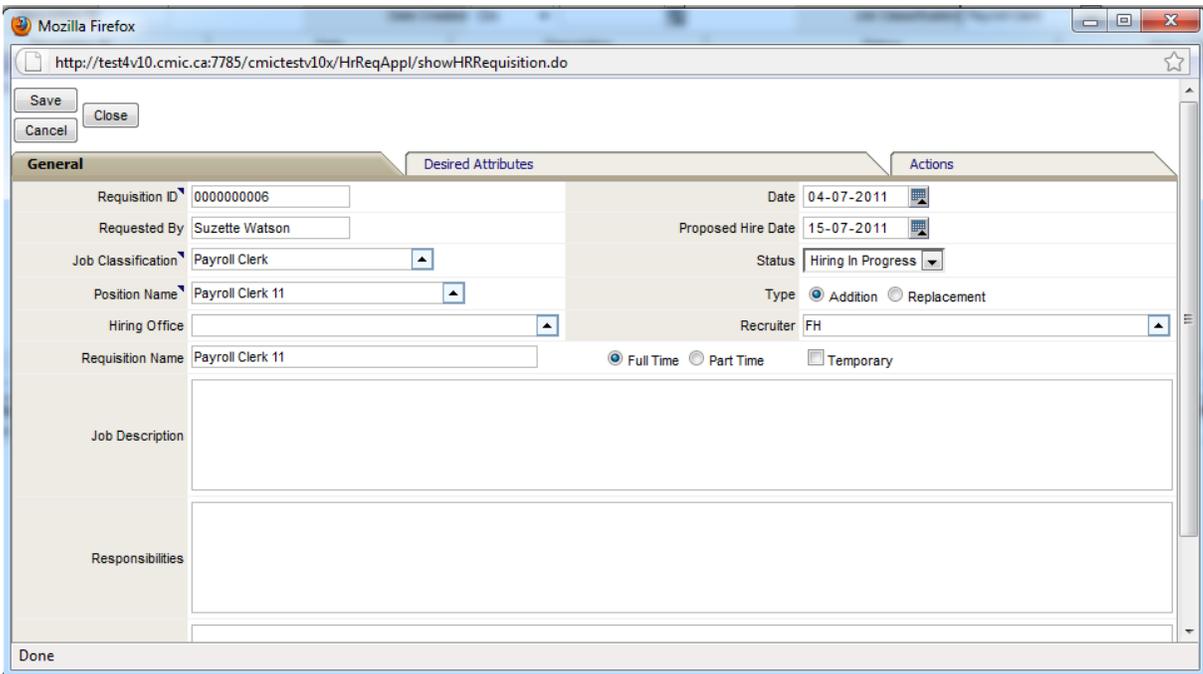
There is an option on this page to search for the specific requisition. User has to enter either Requisition ID, Date Created or/and Job Classification and click on [Search].

Requisition ID	Date	Description	Status	Hiring Office	Action
0000000006	04-07-2011	Payroll Clerk	Hiring In Progress		<a href="#">View details</a>
0000000005	04-07-2011	Payroll Clerk	Hiring In Progress		<a href="#">View details</a>

When user clicks on [View Details] button, the new pop up window opens with tabs: General, Desired Attributes and Actions.



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



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**].

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	Filed	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	Filed		View details
000000011	01-01-2012	Accountant	Pending	West Coast USA	View details
000000004		Carpenter	Filed		View details
000000003		Senior Level Manager	Filed	East Coast USA	View details
000000010		Management Analyst	Pending		View details
000000002		Accountant	Filed	East Coast USA	View details
000000009		Accountant	Hiring In Progress		View details
000000001		Photographers	Filed	Northwest USA	View details

Applicant ID	First Name	Last Name	% of Required Qualifications	% of Desired Qualifications	Action
No qualified applicant found					

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**].

First Name	Last Name	% of Required Qualifications	% of Desired Qualifications	Select
John	Davis	100.0%	100.0%	<input type="checkbox"/>
Austin	Jane	100.0%	100.0%	<input type="checkbox"/>
Zohreh	Allameh	100.0%	100.0%	<input type="checkbox"/>
JOHN	SMITH	100.0%	100.0%	<input type="checkbox"/>
RR	RV	100.0%	100.0%	<input type="checkbox"/>
Joe	Cavali	100.0%	100.0%	<input type="checkbox"/>
Dallas	McLean	100.0%	100.0%	<input type="checkbox"/>
Kate	Smith	100.0%	100.0%	<input type="checkbox"/>

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

# Position Applicants

Position Code	Name
1000	President
2000	Senior Project Manager
20011	Site Supervisor
20012	Site Supervisor
CTO	CTO
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
NAACCT	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-DRYWL	Drywallor Position
SS-DES-P	Designer SS
AD001	Admin Assistant
6ACARPFM01	Carpentry Foreman (FL - 6A - 01)

Applicants			
Applicant #	First Name	Last Name	
david@cmic.ca	Russell	Braybon	
fred@cmic.ca	Fred	Rogers	
maheen@maheen.c	Maheen	Jafari	
pres@cmic.ca	Peter	President	

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

# Applicant Pipeline Report

agement Print Report

Applicant Pipeline Report Parameters		
Show Detailed Notes <input type="checkbox"/>		
Hiring Office Code	Hiring Office Name	Select Hiring Offices To Run Report <input type="checkbox"/> Select All
EC	East Coast USA	<input checked="" type="checkbox"/>
MIDWES	Midwest USE	<input checked="" type="checkbox"/>
NORTHW	Northwest USA	<input type="checkbox"/>
SOUTH	South USA	<input type="checkbox"/>
USNE	US North East	<input type="checkbox"/>
WC	West Coast USA	<input type="checkbox"/>

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

Print Report

Refresh Create New Schedule Preferences

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 Refresh Save Cancel

Schedule Details

Schedule Code:

Schedule Name:

Description:

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	✖

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.

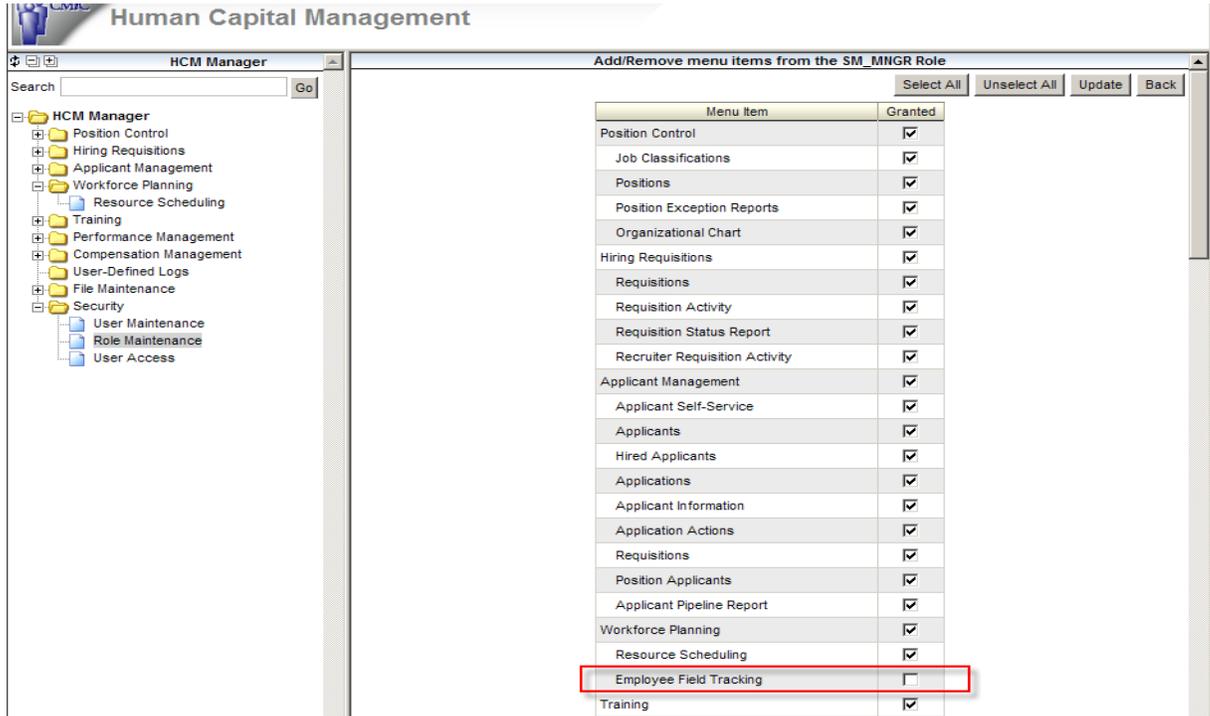
Save Close

Default View:

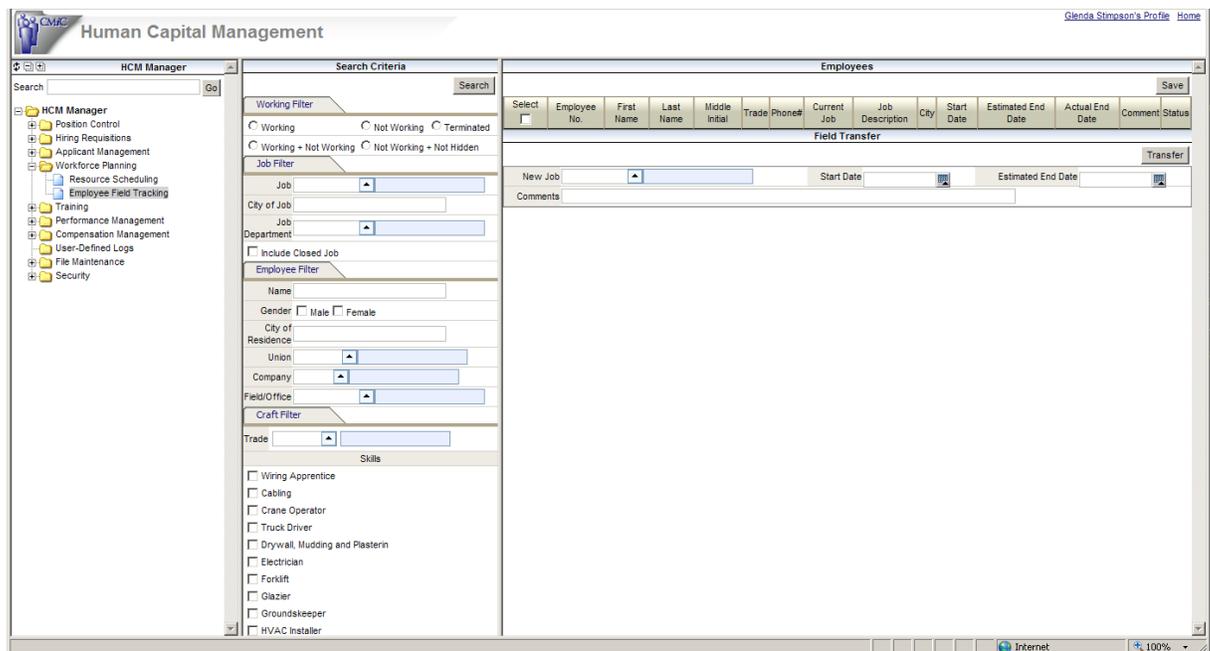
Default Scale:

Default Project:

# Employee Field Tracking



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.



## 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:

The screenshot shows the 'Human Capital Management' software interface. On the left is a navigation tree with categories like HCM Manager, Position Control, Hiring Requisitions, Applicant Management, Workforce Planning, Resource Scheduling, Employee Field Tracking, Training, Performance Management, Compensation Management, User-Defined Logs, File Maintenance, and Security. The main area is divided into 'Search Criteria' and 'Employees'.

**Search Criteria:**

- Working Filter:** Working (selected), Not Working, Terminated
- Job Filter:** Job: [Dropdown], City of Job: [Dropdown], Job: [Dropdown], Department: [Dropdown], Include Closed Job:
- Employee Filter:** Name: [Text], Gender:  Male  Female, City of Residence: [Text], Union: [Dropdown], Company: [Dropdown], Field/Office: [Dropdown]
- Craft Filter:** Trade: [Dropdown]
- Skills:**  Wiring Apprentice,  Cabling,  Crane Operator,  Truck Driver,  Drywall, Mudding and Plasterin,  Electrician,  Forklift,  Glazier,  Groundskeeper,  HVAC Installer

**Employees Table:**

Select	Employee No.	First Name	Last Name	Middle Initial	Trade	Phone#	Current Job	Job Description	City	Start Date
<input type="checkbox"/>	1044214	Jeremy	Forrester	Fred	1611	(212) 555-9999				
<input type="checkbox"/>	1044222	Lantern	Green		1610					
<input type="checkbox"/>	ALT-SAL-MASTRUP	Steen	Mastrup		372					
<input type="checkbox"/>	ALT-SAL-MAUGER	Ivan	Mauger		164	243-357-4589				
<input type="checkbox"/>	ALT-SAL-SIMMONS	Malcolm	Simmons		1620	234-451-4590				
<input type="checkbox"/>	ALT-WK-ASHBY	Martin	Ashby		372	325-358-3898				
<input type="checkbox"/>	ALT-WK-AUTRY	Scott	Autry		1412					
<input type="checkbox"/>	ALT-WK-BRIGGS	Barry	Briggs		TRUC	323-456-3487				
<input type="checkbox"/>	ALT-WK-JESSUP	Dave	Jessup		TRUC					
<input type="checkbox"/>	ALT-WK-LOUIS	John	Louis		6432	234-456-4689				
<input type="checkbox"/>	ALT-WK-NEVADA	Bob	Nevada		372					
<input type="checkbox"/>	ALT-WK-PENHALL	Bruce	Penhall		372					
<input type="checkbox"/>	ALT-WK-SAL-CRUMP	Phil	Crump		372					
<input type="checkbox"/>	ALT-WK-SHIRRA	Mitch	Shirra		372					
<input type="checkbox"/>	JAK001	Jodi	Knickle		1412					
<input type="checkbox"/>	JD-EL-PRESIDENTE	BIG BOSS	MC GEE		100					
<input type="checkbox"/>	JD-SAL-INGER	SAL	INGER		1001	156165162				
<input type="checkbox"/>	JD00-SAL-TEST	Barney	Stinson		1634					
<input type="checkbox"/>	PY-001	Salary emp	PY		100					
<input type="checkbox"/>	PY/BW-001	BW SALARY	PY		100					
<input type="checkbox"/>	PY/MIN-001	001 SALARY	PY/MIN		100					
<input type="checkbox"/>	SM-001-ZZ	Marlene	Miller		142					
<input type="checkbox"/>	SM-EMP01	Amanda	Matthews		142	1154965	11.54965 - T&M Allowances			
<input type="checkbox"/>	SM-EMP02-SAL	Merrick	Wilson		1611					
<input type="checkbox"/>	SM-EMP03-SAL	Karl	Meadows		1412		BASIC	Basic job		2013-01-01

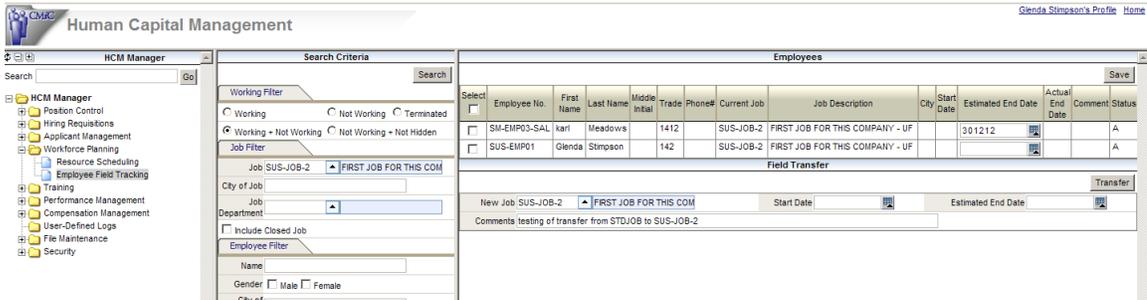
## Transferring Employees to another Job

The screenshot shows the 'Human Capital Management' software interface with the 'Employees' table. The employee 'SM-EMP03-SAL' (Karl Meadows) is selected. Below the table is the 'Field Transfer' section.

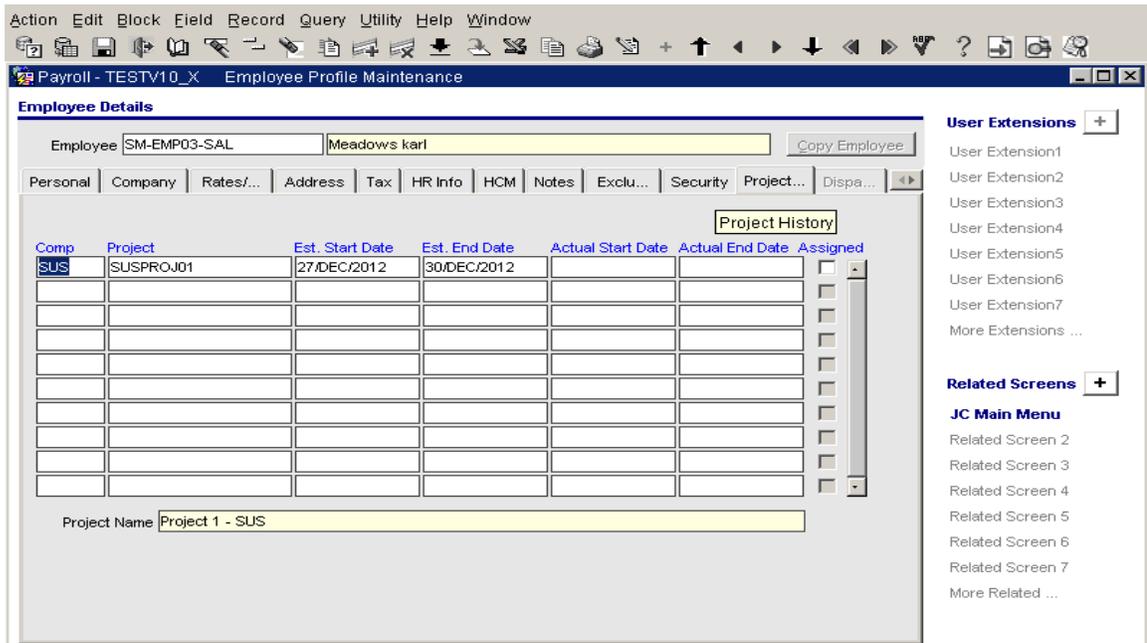
**Field Transfer:**

- New Job:** SUS-JOB-2 (FIRST JOB FOR THIS COM)
- Start Date:** 271212
- Estimated End Date:** 301212
- Comments:** testing of transfer from STDU08 to SUS-JOB-2

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:



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





# Training

## Courses and Modules

The screenshot shows the 'Course Maintenance' application window. On the left is a tree view for 'HCM Manager' with categories like Position Control, Hiring Requisitions, Applicant Management, Workforce Planning, Training, Courses and Modules, Health and Safety, Classes, Training Nominations, My Class Enrollment, Class Enrollment Log, My Course Enrollment, Course Enrollment Log, Review Self-Service Class Enrollment, Retrain Dates, Training Records, Trainer Evaluations, and Trainer Evaluations Review. The main area is titled 'Course' and contains the following fields:

- Code: HSCOURSE
- Name: Health and Safety
- Description: Health and Safety Course
- Vendor: (empty)
- Type: (dropdown menu)
- Trainer: ALEX GIMELSTEIN
- Self Service:
- Training Team: (empty)

Below these fields is a section titled 'Module' with a plus sign (+) button to add new modules.

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**

Search

- [-] HCM Manager
  - [-] Position Control
  - [-] Hiring Requisitions
  - [-] Applicant Management
  - [-] Workforce Planning
  - [-] Training
    - [-] Courses and Modules
      - [-] Health and Safety
      - [-] Classes
      - [-] Training Nominations
      - [-] My Class Enrollment
      - [-] Class Enrollment Log
      - [-] My Course Enrollment
      - [-] Course Enrollment Log
      - [-] Review Self-Service Class Enrollment
      - [-] Retrain Dates
      - [-] Training Records
      - [-] Trainer Evaluations
      - [-] Trainer Evaluations Review
    - [-] Performance Management
    - [-] Compensation Management
    - [-] User-Defined Logs
    - [-] File Maintenance
    - [-] Security

**Course**

Code: HSCOURSE Name: Health and Safety

Description: Health and Safety Course

Vendor:  Type: Other Trainer: ALEX GIMELSTEIN Self Service:

Training Team:

---

**Module**

Code: HS-101J	Name: HS for the Job Site	Description: Health and Safety rules and regulations as they apply to the job s
Internal: <input checked="" type="checkbox"/>	Vendor: <input type="text"/>	Web Link: <input type="text"/> Prerequisite Cour
Reimbursable: <input type="checkbox"/>	Duration: 2 Days	Credit Points: <input type="text"/> Frequen
Credit Hours: 16	Cost: <input type="text"/>	Location: Head Office Train
Training Team: <input type="text"/>		

---

Code: HS-102J	Name: Hazard Identification	Description: Hazard Identification, Assessment and Control Methods
Internal: <input checked="" type="checkbox"/>	Vendor: <input type="text"/>	Web Link: <input type="text"/> Prerequisite Cour
Reimbursable: <input type="checkbox"/>	Duration: 1 Days	Credit Points: <input type="text"/> Frequen
Credit Hours: 8	Cost: <input type="text"/>	Location: Head Office Train
Training Team: <input type="text"/>		

- 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 **+** to add another Module or the [Save] button to save all the data entered.

# Classes

**Maintain And Schedule Classes** [Save] [Cancel]

**HCM Manager**

Search [ ] Go

- HCM Manager
  - Position Control
  - Job Classifications
  - Positions
  - Position Exception Reports
  - Organizational Chart
  - Hiring Requisitions
    - Requisitions
    - Requisition Activity
    - Requisition Status Report
  - Applicant Management
    - Applicant Self-Service
    - Applicants
    - Hired Applicants
    - Applications (33, 4)**
    - Application Actions
    - Requisitions
    - Applicant Pipeline Report
  - Workforce Planning
    - Resource Scheduling
  - Training
    - Courses and Modules
      - Health and Safety
      - Classes**
      - Training Nominations
      - Class Enrollment
      - Class Enrollment Log
      - Course Enrollment
      - Course Enrollment Log
      - Review Self-Service Class Enrollment
      - Retrain Dates
      - Training Records
      - Trainer Evaluations
      - Trainer Evaluations Review
    - Performance Management
    - Job Classification Performance Stand

**Class**

Course: Health and Safety | Module: HS for the Job Site | Code: 062-HS101J

Name: Job Site HS | Start Date: 01/10/2008 | Completion Date: 01/12/2009

Status: INPROG | Start Time: 09:00 | Duration: 2 Days

Cost: 0 | Retrain On: 01/10/2009 | Self Service:

Description: Health and Safety rules and regulations as they apply to the job site. | Trainer: Alex Gimmelstein

Location: Head Office

**Attendees** [Add]

## *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 Schedule Classes**

**Class**

Course: Health and Safety | Module: HS for the Job Site | Code: 062-HS101J

Name: Job Site HS | Start Date: 01/10/2008 | Completion Date: 01/12/2008

Status: INPROG | Start Time: 09:00 | Duration: 2 Days

Cost: 0 | Retrain On: 01/10/2009 | Self Service:

Description: Health and Safety rules and regulations as they apply to the job site. | Trainer: Alex Gimmelstein

Location: Head Office

**Attendees** Add

Employee Code	Employee Name	Nominated By	Enrolled By
ZZ-200	Andy Andersen		

- Open the required class from the class log
- **[Edit]** the class
- Use the **Add** link on the 'Attendees' bar

Find: %

<< Prev Set | 1 - 50 of 319 | Next Set >>

Selected: 0

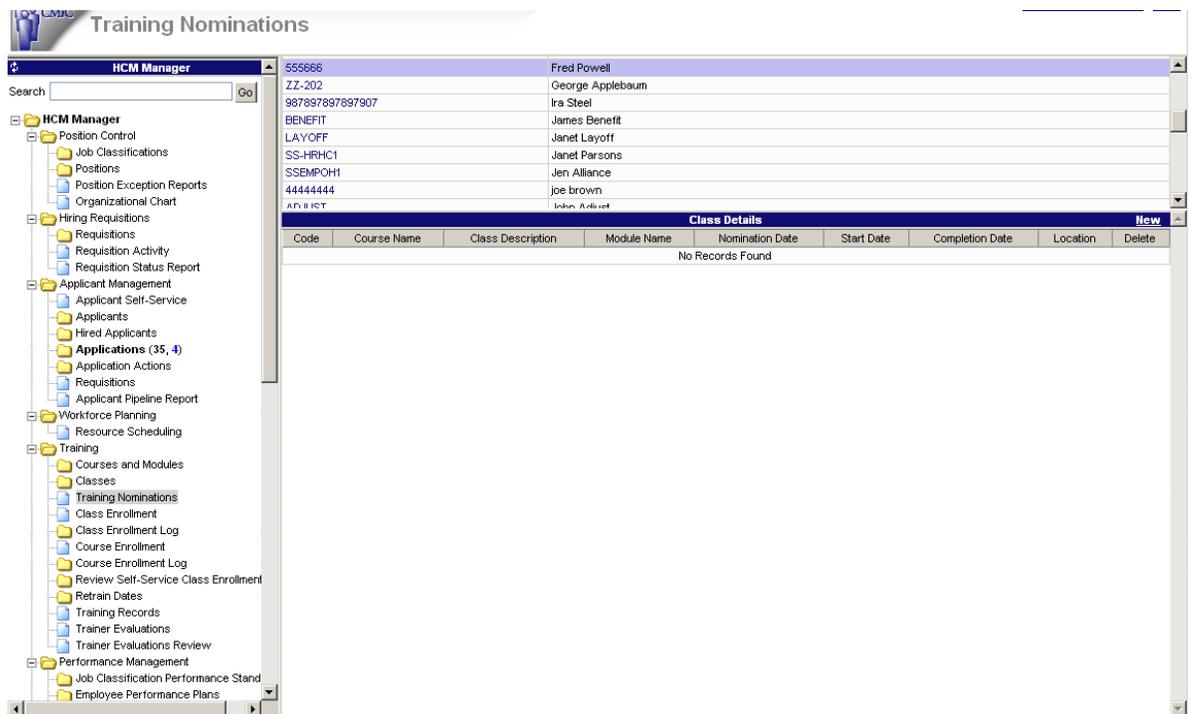
Company Code:  Job Class Code:  Job Family:  Job Classification:  Hire Date Before:

Employee No	First Name	Last Name	Job Class Code	Job Family	Company Code	Company	Job Classification	Hire Date	Select
4PWOR4SPAY	4SPaying	4PWorking	CM01	Const. Managers	4S	Four Corner TEST-2004-B (4S)	Construction Managers	2001-03-24	<input type="checkbox"/>
4SWOR4PPAY	4PPaying	4SWorking	CM01	Const. Managers	4P	TEST2005 Company 4P	Construction Managers	2001-03-24	<input type="checkbox"/>
ADJUST	John	Adjust	1234	Apprentice	SS	SS & Construction Company	Hod Acrier Apprentice	2006-01-01	<input type="checkbox"/>
JOJAH	George	Ah	CM01	Const. Managers	MP	MurzPTF	Construction Managers	2005-01-01	<input type="checkbox"/>
SSEMPOH1	Jen	Alliance	ADMN	SYSTEMADMIN	SS	SS & Construction Company	System Administrator	2006-01-01	<input type="checkbox"/>
4P2004-15A	Greg	Alvin	GL01	General Labor	4P	TEST2005 Company 4P	General Labor - Skilled	2006-02-02	<input type="checkbox"/>
ZZ-200	Andy	Andersen	ZZ20	Electrician	ZZ	CMIC ZZ Test Company	Electrician	1978-01-01	<input type="checkbox"/>
4S-WK0003H	Neo	Anderson	GL01	General Labor	4S	Four Corner TEST-2004-B (4S)	General Labor - Skilled	2001-03-04	<input type="checkbox"/>
4PHR-10078WK	Neo	Anderson	EL02	Electrician	4P	TEST2005 Company 4P	Electrician	2003-01-25	<input type="checkbox"/>
4PHR-10065WK	Richard	Anderson	CO02	Cement	4P	TEST2005 Company 4P	Cement Masons	2002-12-31	<input type="checkbox"/>
4P-CO-LONGNUMBER	Josephine	Anderson-Walker	GL01	General Labor	4P	TEST2005 Company 4P	General Labor - Skilled	2003-02-10	<input type="checkbox"/>
4PSA-P0004WK	Tyler	Andronki	SS01	Site Supervisor	4P	TEST2005 Company 4P	Site Supervisors	1992-07-06	<input type="checkbox"/>
ZZ-202	George	Applebaum	CP01	Mstr Carpenter	ZZ	CMIC ZZ Test Company	Master Carpenter	2004-01-01	<input type="checkbox"/>
5PH-FL013-WK	HR	ApplicantSKILLS	GL01	General Labor	4P	TEST2005 Company 4P	General Labor - Skilled	2003-02-15	<input type="checkbox"/>
4PHR-90069WK	Michaelangelo	Arlington-Vajlon	GL01	General Labor	4P	TEST2005 Company 4P	General Labor - Skilled	2002-05-02	<input type="checkbox"/>

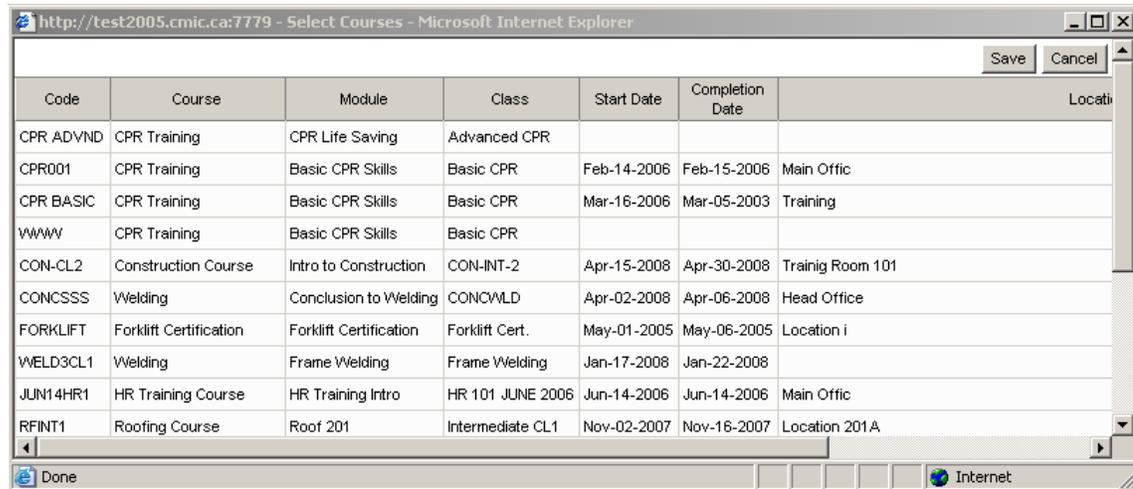
This will open a multi select list of all employees, select the required employees then **[Accept]** your selection.

This will assign all the selected employees to the class.

## Nominate an Employee



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



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 [Show Classes](#) link on the Employees bar.

## Self Enrollment

The screenshot shows the 'Class Enrollment' interface. On the left is a tree view with categories like 'Courses and Modules', 'Performance Management', and 'Compensation Management'. On the right is a table titled 'Assigned Classes' with the following data:

Course Name	Module Name	Class Name	Start Date	Status	By	Action
Construction Course	Intro to Construction	Introductory Course on Construction	01-Apr-2008	Enrolled	Suzette Watson	
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	
HR Training Course	HR Training Intro	Introduction to HR	14-Jun-2006	Applied	Suzette Watson	X

- 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

Class Code	Class Short Description	Class Description	Trainer Name	Course Name	Module Name	Total Nominations	Total Enrollments	
APR.2013		Microsoft Excel module 01	Suzette Watson	Microsoft Excel 2010	MS Excel-01	1	2	
DEC2012		Microsoft Excel module 01	Suzette Watson	Microsoft Excel 2010	MS Excel-01	0	4	
JAN2013		Microsoft Excel module 01		Microsoft Excel 2010	MS Excel-01	0	0	
ZZ-SAFETY	Basic Safety	Basic Safety		Company Safety Training	Basic Safety	0	0	
<b>Total (4 rows)</b>								

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 Excel 2010	Module	MS Excel-01
Name		Start Date	20-04-2013
Status	SCHEDULE	Trainer	Suzette Watson
Cost	\$20.00	Retrain On	
Description	MS Excel-01	Completion Date	21-04-2013
Location	Small Board room	Duration	1 Days

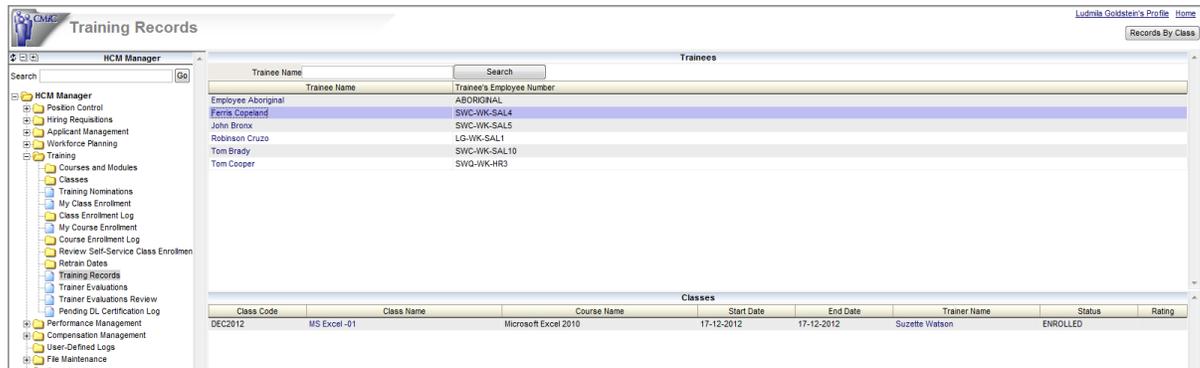
  

Attendees					
Employee Code	Employee Name	Nominated By	Enrolled By	Enrollment Date	Enroll
SWC-WK-HR1	Annabelle Lewis	Ludmila Goldstein			<input type="checkbox"/>
LG-WK-SAL1	Robinson Cruzo		Ludmila Goldstein	2013-04-10	<input checked="" type="checkbox"/>
ABORIGINAL	Employee Aboriginal		Ludmila Goldstein	2013-04-10	<input checked="" type="checkbox"/>

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

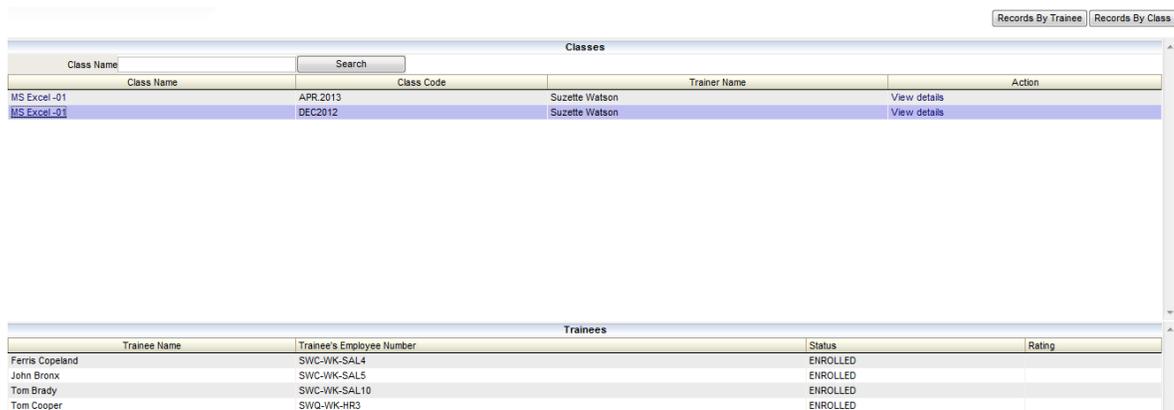


This program allows user to view training records of employees. When user clicks on Trainee Name in the lower block he can see Classes details for this Trainee.

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.

Course		Module		Class Code	
Course	Microsoft Excel 2010	Module	MS Excel-01	Class Code	DEC2012
Class Name	MS Excel-01	Start Date	17-12-2012	Completion Date	17-12-2012
Status	Schedule	Start Time	01:00 AM	Duration	1 Days
Cost	\$0.00	Retrain On		Self Service	<input type="checkbox"/>
Location	CMC			Trainer	Suzette Watson
Class Description: Microsoft Excel module 01					
Attendees					
Employee Code	SWC-WK-SAL4	Employee Name	Ferris Copeland	Nominated By	Enrolled By
Enrollment Date	10-12-2012	Start Date	17-12-2012	Completion Date	17-12-2012
Status	Enrolled	Start Time	01:00 AM	Retrain On	Written Rating
Perf. Rating		Memo		Cost	\$ 0.00
Employee Code	SWQ-WK-HR3	Employee Name	Tom Cooper	Nominated By	Enrolled By
Enrollment Date	10-12-2012	Start Date	17-12-2012	Completion Date	17-12-2012
Status	Enrolled	Start Time	01:00 AM	Retrain On	Written Rating
Perf. Rating		Memo		Cost	\$ 0.00
Employee Code	SWC-WK-SAL5	Employee Name	John Bronx	Nominated By	Enrolled By
Enrollment Date	10-12-2012	Start Date	17-12-2012	Completion Date	17-12-2012
Status	Enrolled	Start Time	01:00 AM	Retrain On	Written Rating
Perf. Rating		Memo		Cost	\$ 0.00
Employee Code	SWC-WK-SAL10	Employee Name	Tom Brady	Nominated By	Enrolled By
Enrollment Date	10-12-2012	Start Date	17-12-2012	Completion Date	17-12-2012
Status	Enrolled	Start Time	01:00 AM	Retrain On	Written Rating
Perf. Rating		Memo		Cost	\$ 0.00

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



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

Trainer Evaluation			
Class Name	Trainer Name	Question	Ranking
Managing Worksite Conditions and Equipment	Peter Paulson	Was the trainer knowledgeable	Select Ranking
		Was the course content delivered	Select Ranking
		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

Select Trainer, Course or Class						
Trainer Name	Trainer Name	Course Name	Course Name	Class Code	Class Name	Ranking
Peter Paulson		Safety Construction Orientation Training		0510	Managing Worksite Conditions and Equipment	3.33

Evaluation Questions			
#	Question	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

Employee No.	Name	Status	Type	Code	Effective Date	License Class	License Number	State Code	State Name	Supervising Employee	Comments	Requalify/Renew On	Renewal Days
SWC-WK-HR1	Carrington, Nathaniel	A	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	A	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	A	License	FORKLIFT	2007-05-02		123	AL	Alabama			2012-05-02	-519
LG1-BW-SAL1	Estee, Lauder	A	Certification	EFA	2013-01-07							2013-12-31	89
LG1-BW-SAL1	Estee, Lauder	A	Certification	DRUG	2013-01-07							2014-06-30	270
CCC-WK-HR2	Sherman, Richard	A	Certification	SAFETY	2013-09-14							2014-09-14	346
1044226	Jeremy, West	A	License	FORKLIFT	2013-02-01			AK	Alaska				
LG1-BW-HRS	Austin, Jane	A	License	PMP	2013-02-01			MB					
JCR.TEST.SAL	Salaried, Test	A	License	PMP	2013-04-07			AB					
SWC-WK-HR20	Harrison, Mike	A	License	FORKLIFT	2010-01-01			NY	New York				
ALT-WK-ASHBY	Ashby, Martin	A	Certification	ZZ-SAFETY1	2010-01-01								
ALT-WK-ASHBY	Ashby, Martin	A	License	FORKLIFT	2009-05-01		238998	IL	Illinois				
74859679	Allameh, Zohreh	A	Certification	SMI002	2013-02-01								
SWC-WK-HRS -ASH	Simeon, Ashley	A	Certification	DRUG	2013-07-11			IL	Illinois	SWC-WK-HR6			
SWC-WK-HR9	Feldman, Corey	A	License	FORKLIFT	2010-01-01			FL	Florida				

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



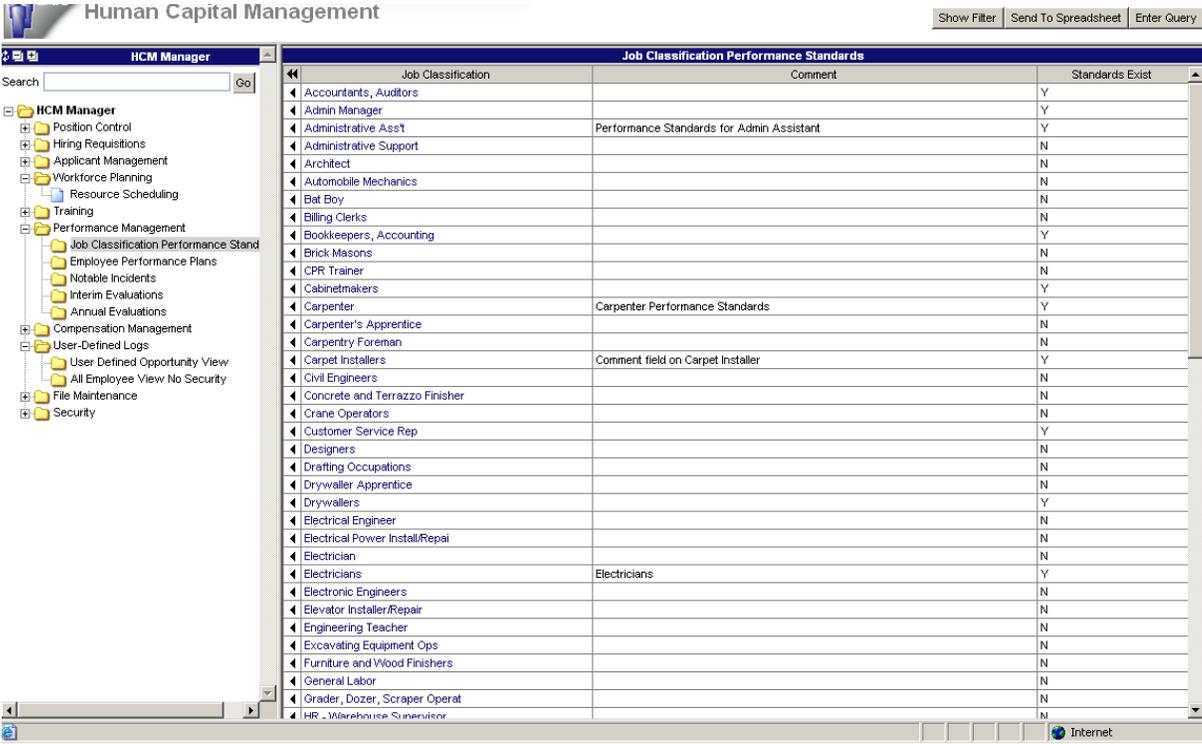
# Performance Management

## 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



### 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:

Human Capital Management

Copy From Another Performance Standard | Create | Back To Log

HCM Manager

Search [ ] Go

HCM Manager

- Position Control
- Hiring Requisitions
- Applicant Management
- Workforce Planning
  - Resource Scheduling
- Training
- Performance Management
  - Job Classification Performance Stand
    - Carpentry Foreman
    - Employee Performance Plans
    - Notable Incidents
    - Interim Evaluations
    - Annual Evaluations
- Compensation Management
- User-Defined Logs
  - User Defined Opportunity View
  - All Employee View No Security
  - File Maintenance
  - Security

Job Classification Performance Standards

Code: Carp. Foreman

Name: Carpentry Foreman

Comment: [ ]

Corporate Standards

Values and Individual Behaviors

- 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 recognizes the value in donating time and talent to charitable, civic and other organizations in a way that enhances the individual, supports the community and furthers the goals of Superior Construction Inc.
- Work Ethic  
Works in a organized, productive way that helps maintain proper balance between work priorities and personal priorities. Through planning and teamwork is able to accomplish tasks expeditiously and accept additional responsibilities and assignments that develop new skills and abilities.
- Support for Diversity  
Demonstrates understanding of the value of diversity in all its forms in the workplace and helps promote diversity internally including managing in a fair and objective manner. Shows sensitivity to public perceptions, attitudes and concerns about diversity.

Learning and Growth

- 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 management process to set goals and expectations, review performance, and provide appropriate developmental guidance.

Demonstrated Professional Skills

- Functional and Analytical Expertise  
Consistently utilizes skills, processes and analytical and problem solving methods that are accepted by the profession and function to produce high-quality results.

Superior Construction Processes

- Business Processes  
Understands internal business processes and their value, including materials like the Standard Operating Procedure, Quality Assurance, Safety, HR Guidelines and other internal manuals and guidelines. Seeks ways to continually improve processes for the unit and the organization as a whole. Helps create a favorable climate for change and helps others overcome resistance to change.
- Safety  
Understands the importance of a safe working environment, including the personal impact on employees, project team members, and others inside and outside the organization.

Others

- Item 1  
To be determined at a lower level
- Item 2

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.

Human Capital Management Edit Delete Back To Log

**HCM Manager**

Search

- [-] HCM Manager
  - [+] Position Control
  - [+] Hiring Requisitions
  - [+] Applicant Management
  - [+] Workforce Planning
    - [-] Resource Scheduling
    - [+] Training
  - [+] Performance Management
    - [+] Job Classification Performance Stand
      - [+] **Carpentry Foreman**
      - [+] Employee Performance Plans
      - [+] Notable Incidents
      - [+] Interim Evaluations
      - [+] Annual Evaluations
  - [+] Compensation Management
  - [+] User-Defined Logs
  - [+] File Maintenance
  - [+] Security

**Performance Standards for  
Carpentry Foreman**

Comments

<b>Values and Individual Behaviors</b>	<b>20 Weight</b>
<b>Basic Business Conduct</b> Displays behaviors that embody integrity, listening skills, ethical negotiation and other fair and equitable business practices, and treats others with respect. Also recognizes the value in donating time and talent to charitable, civic and other organizations in a way that enhances the individual, supports the community and furthers the goals of Superior Construction Inc.	
<b>Work Ethic</b> Works in a organized, productive way that helps maintain proper balance between work priorities and personal priorities. Through planning and teamwork is able to accomplish tasks expeditiously and accept additional responsibilities and assignments that develop new skills and abilities.	
<b>Support for Diversity</b> Demonstrates understanding of the value of diversity in all its forms in the workplace and helps promote diversity internally including managing in a fair and objective manner. Shows sensitivity to public perceptions, attitudes and concerns about diversity.	
<b>Learning and Growth</b>	<b>25 Weight</b>
<b>Individual Development</b> Pursues individual growth and developmental opportunities, including internal and external development and formal and informal training and strives to become more professionally competent.	
<b>Team Leadership</b> 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 management process to set goals and expectations, review performance, and provide appropriate developmental guidance.	
<b>Demonstrated Professional Skills</b>	<b>30 Weight</b>
<b>Functional and Analytical Expertise</b> Consistently utilizes skills, processes and analytical and problem solving methods that are accepted by the profession and function to produce high-quality results.	
<b>Superior Construction Processes</b>	<b>15 Weight</b>
<b>Business Processes</b> Understands internal business processes and their value, including materials like the Standard Operating Procedure, Quality Assurance, Safety, HR Guidelines and other internal manuals and guidelines. Seeks ways to continually improve processes for the unit and the organization as a whole. Helps create a favorable climate for change and helps others overcome resistance to change.	
<b>Safety</b> Understands the importance of a safe working environment, including the personal impact on employees, project team members, and others inside and outside the organization.	

*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

The screenshot displays the HCM Manager interface. On the left is a navigation tree with categories like Position Control, Hiring Requisitions, and Employee Performance Plans. The main window shows a performance plan for Ben Carleton, a Bookkeeper in Accounting. The plan is titled 'Ben's Performance Plan Jan 4, 2008 to Jan 4, 2009'. It features a table with two columns: 'Performance Standards for Bookkeepers, Accounting' and 'Agreed Performance Plan and Objectives for Ben Carleton (2008-03-25 to 2009-03-25)'. The table is divided into sections: 'Values and Individual Behaviors' (20 Weight) and 'Learning and Growth' (25 Weight). Under 'Values and Individual Behaviors', there are three sub-sections: 'Basic Business Conduct', 'Work Ethic', and 'Support for Diversity'. Under 'Learning and Growth', there are two sub-sections: 'Individual Development' and 'Team Leadership'. The 'Team Leadership' section includes a note about team-building activities and budget allocation.

## Performance Review

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.

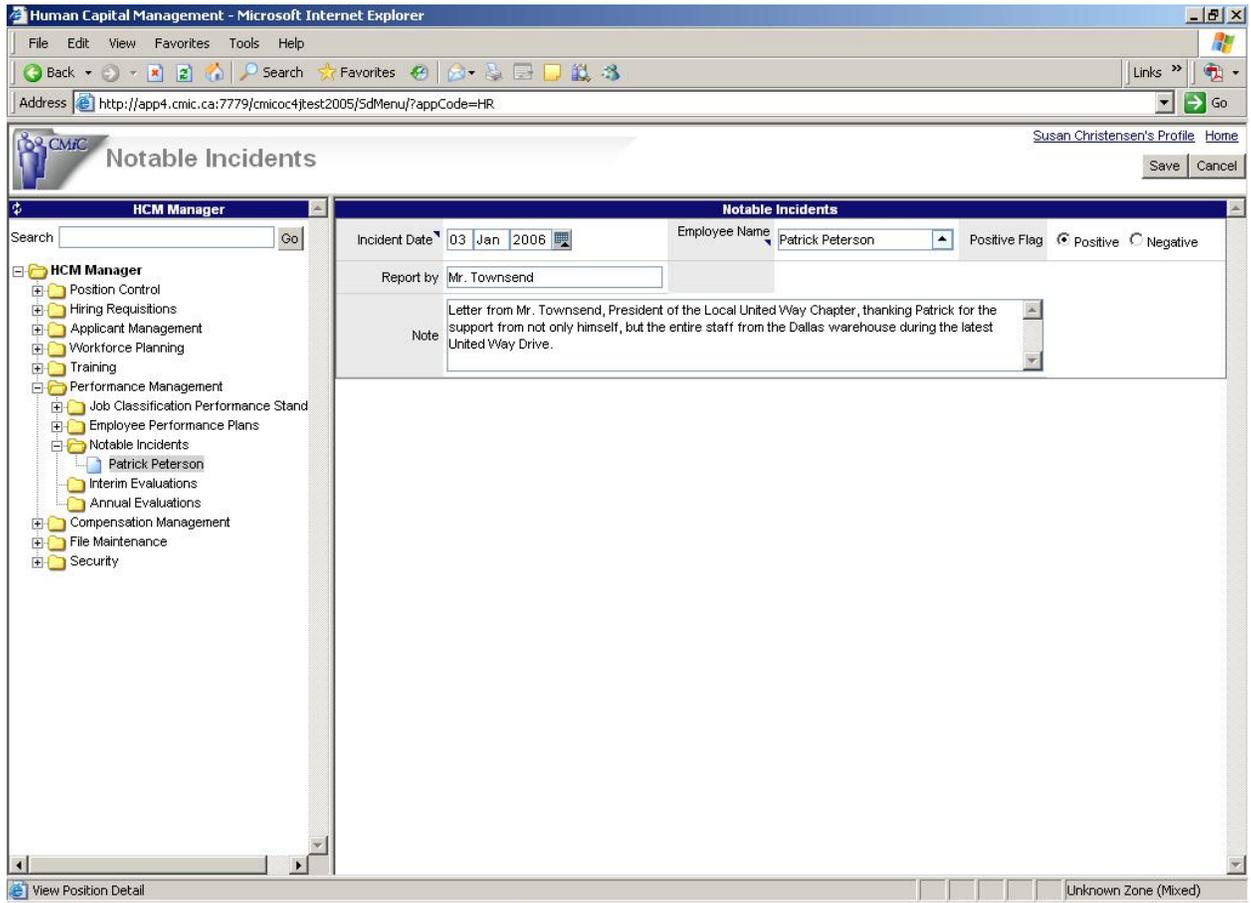
## Pre-Requisites:

- 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



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.

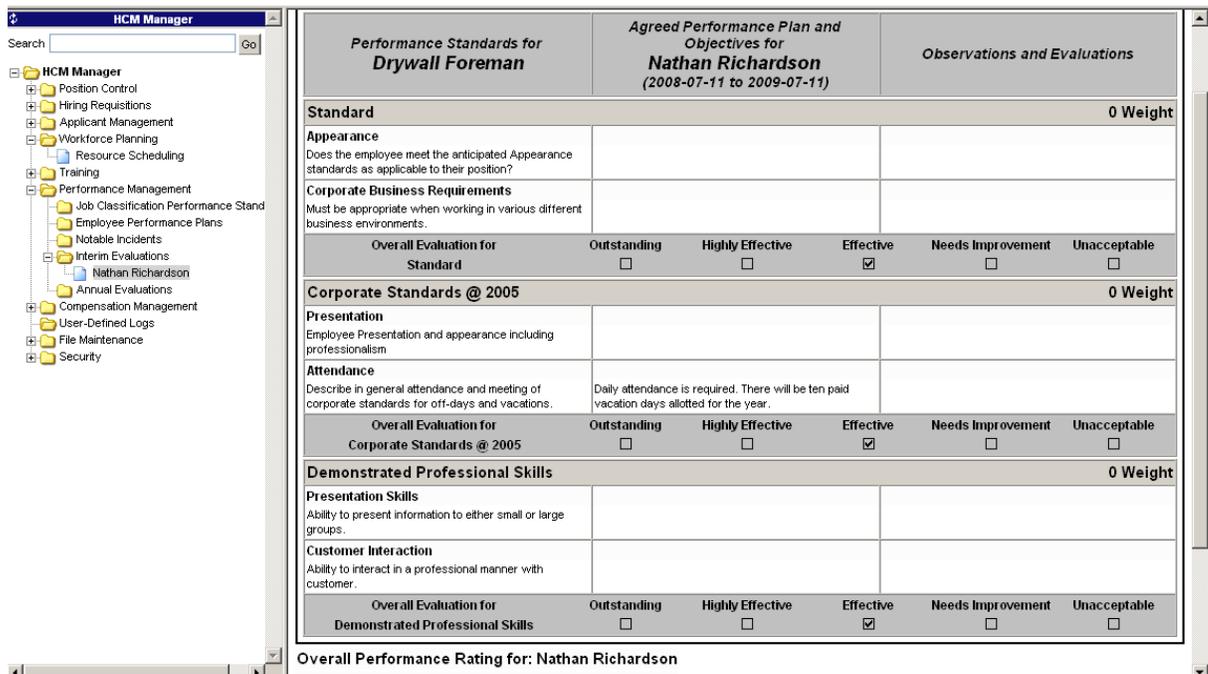
The system will default to the latest created review. To review previously performed reviews select the review from the Review date drop down list and retrieve the review information.

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



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.



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 Notable Incidents

## Annual Evaluations

The screenshot shows the 'Human Capital Management' interface. On the left is a navigation tree with categories like HCM Manager, Position Control, Hiring Requisitions, Applicant Management, Workforce Planning, Resource Scheduling, and Training. The main content area displays a performance plan for 'Nathan Richardson', a Drywall Foreman, managed by 'Suzette Watson'. The plan is for the period '2008-07-11 to 2009-07-11'. The main table has three columns: 'Performance Standards for Drywall Foreman', 'Agreed Performance Plan and Objectives for Nathan Richardson (2008-07-11 to 2009-07-11)', and 'Observations and Evaluations'. Buttons for 'Edit', 'View Notable Incidents', and 'Back To Log' are visible at the top right.

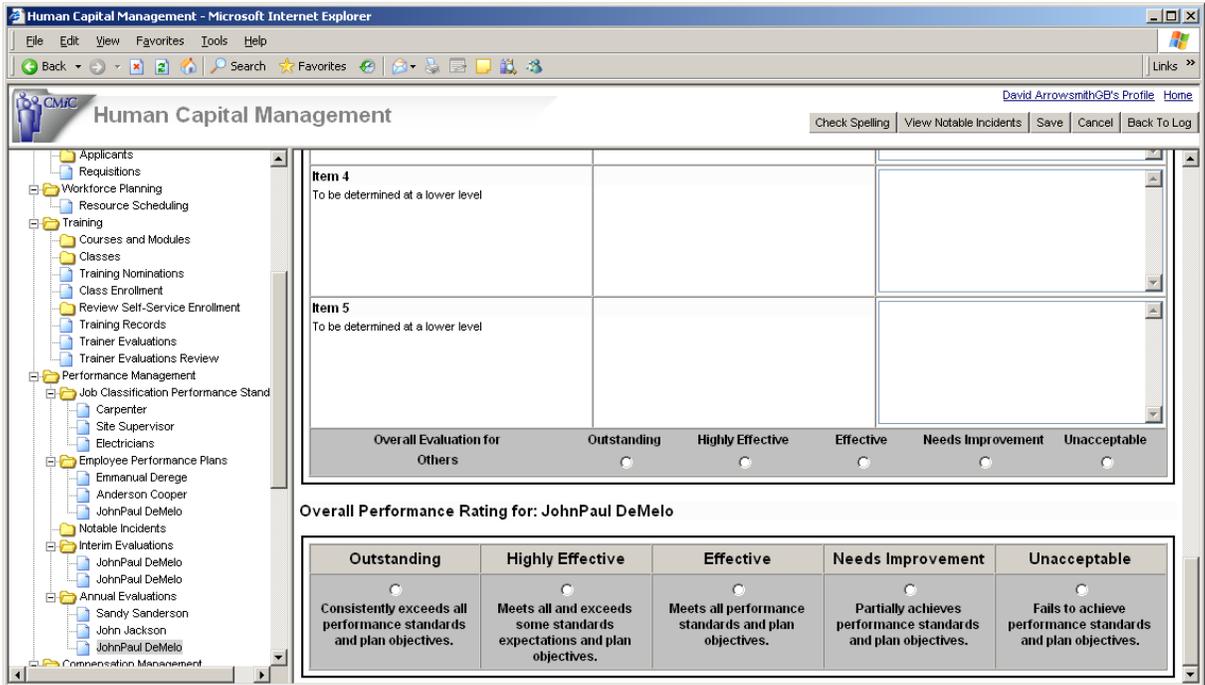
Annual evaluations have been designed to be pre-populated with all the items from the interim evaluations that were flagged to be carried forward to the Final Evaluation. Annual Evaluations allow the manager to enter additional observations/notes against each section of the employee's plan and to rate 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.

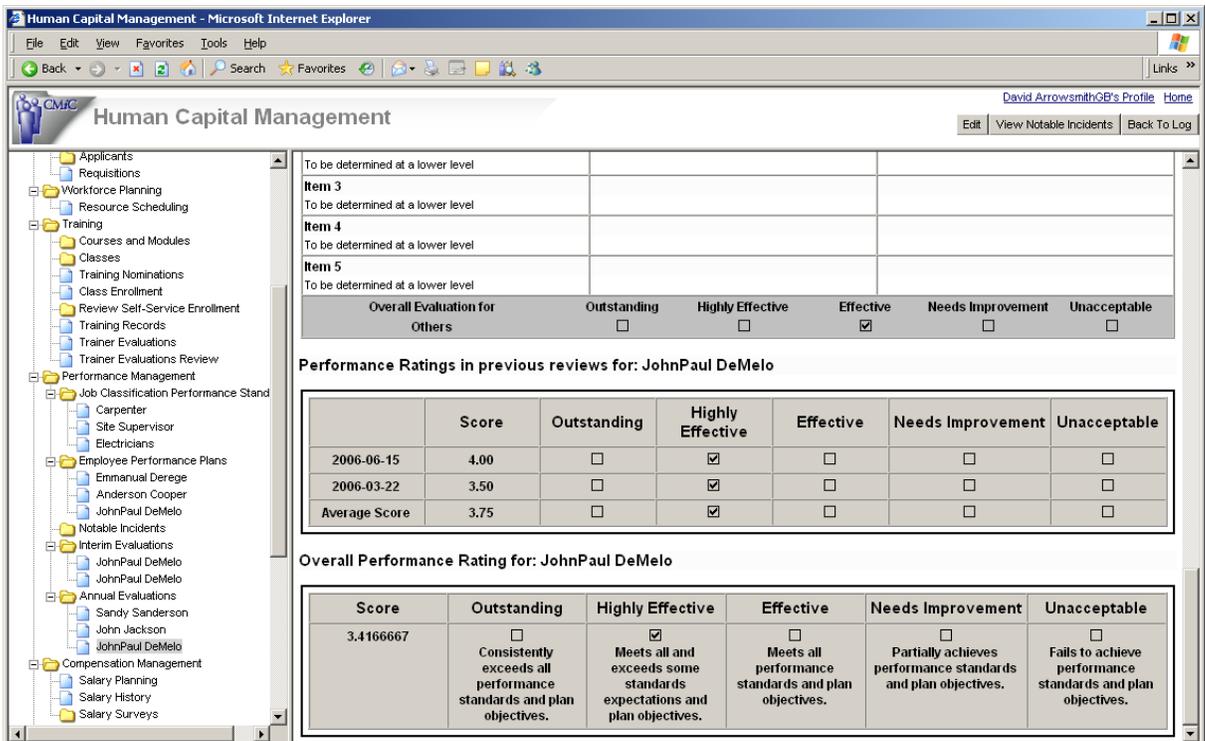
This screenshot shows a detailed performance evaluation for 'JohnPaul DeMelo', an Electrician, for the period '2006-01-01 to 2007-01-01'. The interface includes a navigation tree on the left with categories like Applicants, Workforce Planning, Training, Performance Management, and Compensation Management. The main area is a table with three columns: 'Performance Standards for Electricians', 'Agreed Performance Plan and Objectives for JohnPaul DeMelo (2006-01-01 to 2007-01-01)', and 'Observations and Evaluations'. The table is divided into sections: 'Values and Individual Behaviors' (20 Weight), 'Work Ethic', and 'Support for Diversity'. Each section contains descriptive text for both standards and observations. At the bottom, there is an 'Overall Evaluation for Values and Individual Behaviors' section with radio buttons for 'Outstanding', 'Highly Effective', 'Effective', 'Needs Improvement', and 'Unacceptable'. A 'Learning and Growth' section is partially visible at the bottom with a weight of 25. Buttons for 'Check Spelling', 'View Notable Incidents', 'Save', 'Cancel', and 'Back To Log' are at the top right.

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.



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.



# Employee Discipline History

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

The screenshot shows the HCM Manager interface. On the left is a navigation tree with 'Employee Discipline History' selected. The main area displays a table of employee discipline records and a 'Discipline Details' form below it.

Employees		Pending	Submitted	Signed
SM-EMP01	Amanda Matthews	1	4	1
ALT-WK-BRIGGS	Barry Briggs	0	0	0
ALT-WK-NEVADA	Bob Nevada	0	0	0
ZZ-251	Bruce Alexandrowicz-Smitherton	0	0	0
ALT-WK-PENHALL	Bruce Penhall	0	0	0
SUS-EMP-2	Damon Hendricks	0	0	0
ZZ-WK-SAL1	Daniel King	0	0	0

Transaction No	Performed Date	Type	Action	Handled By	Effective Date	Status	Action
12	08Dec2010	Written	Written	Damon Hendricks	08Dec2010	Submitted	
13	08Dec2010	Verbal	Sent Home Without Pay	Amanda Matthews	07Dec2010	Submitted	
7		Verbal	Written		10Nov2010	Submitted	
8	19Nov2010	Written	Sent Home Without Pay		19Nov2010	Submitted	
10	30Nov2010	Written	Written	Damon Hendricks	30Nov2010	Pending	
14	04Dec2010	Verbal	Sent Home Without Pay	Amanda Matthews	03Dec2010	Employee Signed	

The 'Discipline Details' form includes fields for: Discipline Type (dropdown), Action Taken (dropdown), Effective Date (calendar), Close Date (calendar), Problem Description (text area), Handled By (dropdown), Performed Date (calendar), and Resolution (text area). Buttons for 'Save' and 'Submit' are visible.

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.

This screenshot shows a discipline record in a 'Draft' state. The table above shows the record with a status of 'Pending'.

Transaction No	Performed Date	Type	Action	Handled By	Effective Date	Status	Action
12	08Dec2010	Written	Written	Damon Hendricks	08Dec2010	Submitted	
13	08Dec2010	Verbal	Sent Home Without Pay	Amanda Matthews	07Dec2010	Submitted	
7		Verbal	Written		10Nov2010	Submitted	
8	19Nov2010	Written	Sent Home Without Pay		19Nov2010	Submitted	
10	30Nov2010	Written	Written	Damon Hendricks	30Nov2010	Pending	
14	04Dec2010	Verbal	Sent Home Without Pay	Amanda Matthews	03Dec2010	Employee Signed	

The 'Discipline Details' form for this record shows: Discipline Type: Verbal, Action Taken: S, Effective Date: 071210, Close Date: 081210, Problem Description: test again, Handled By: Amanda Matthe, Performed Date: 081210, and Resolution: none as yet. A 'Send Email' button is present in the top right of the form area.

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.

HR Positions Amanda Mathews's Profile Home  
Delete Add Edit Back To Log

Search

HCM Manager

- Position Control
  - Job Classifications
  - Positions
  - Position Exception Reports
  - Organizational Chart
- Hiring Requisitions
- Applicant Management
- Workforce Planning
- Training
- Performance Management
  - Job Classification Performance Stand
  - Employee Performance Plans
  - Notable Incidents
  - Interim Evaluations
  - Annual Evaluations
  - Employee Discipline History
- Compensation Management
  - Salary Planning
  - Salary History
  - Salary Surveys
  - User Defined Logs
  - File Maintenance
  - Security

Code	Employee Name	Pending	Submitted	Signed
SM-EMP01	Amanda Mathews	1	1	0
SUS-EMP-2	Damon Hendricks	0	0	0
SUS-EMP01	Glenda Stampson	0	0	0
SUS-EMP02	Greg Harrison	0	0	0
SU-002	Mavis Longmore	0	0	0
SM-EMP02-SAL	Merrick Wilson	0	0	0

Transaction No	Performed Date	Type	Action	Handled By	Effective Date	Status
7		Verbal	Written		10Nov2010	Submitted
8	19Nov2010	Written	Sent Home Without Pay		19Nov2010	Pending

Discipline Details

Email has been sent to Amanda Mathews Send Email

Discipline Type: Verbal

Action Taken: W

Effective Date: 101110 Close Date: [ ]

Problem Description: This employee is very excellent worker. She does her work with no supervision, and constantly delivers on time. Instead of recognising her accomplishments I believe her salary should be frozen until she becomes totally frustrated, then she will have no choice but to leave. (ahaf reverse psychology)

Handled By: [ ]

Performed Date: [ ]

Resolution: [ ]

Disciplinary Action Notice - Message (Plain Text)

Message

Reply Reply Forward Delete Move to Folder Create Rule Other Actions Block Sender Not Junk Categorize Follow Up Mark as Unread Find Related Select

From: stephanie.bromfield@cmic.ca  
To: Stephanie Bromfield  
Cc:  
Subject: Disciplinary Action Notice

A disciplinary action has been taken, for detail information please click the following link to log on to employee self service.  
<http://testv10.cmic.ca:7785/SdMenu/?appCode=SSE>

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 Service Amanda Mathews's Profile Home Logout

Search

Employee Self Service

- Personal Information
  - Profile Information
  - HR Information
  - W-4 Information
  - T-01 Information
  - Emergency Contacts
  - Skills
  - Certification and Licenses
  - Degrees
  - Memberships
  - Interim Evaluation
  - Annual Evaluation
  - Discipline History
- Payment Administration
- Corporate Learning
- Recruiting
- Corporate Information
- Security
- Manager Self Service

Transaction No	Performed Date	Type	Action	Handled By	Effective Date	Status
12	00Dec2010	Written	Written	SUS-EMP-2	00Dec2010	Submitted
13	00Dec2010	Verbal	Sent Home Without Pay	SM-EMP01	07Dec2010	Submitted
7		Verbal	Written		10Nov2010	Submitted
8	19Nov2010	Written	Sent Home Without Pay		19Nov2010	Submitted
14	04Dec2010	Verbal	Sent Home Without Pay	SM-EMP01	03Dec2010	Employee Signed

Discipline Details

Discipline Type: Written Save

Action Taken: S

Effective Date: 191110 Close Date: [ ]

Problem Description: What I consider to be insubordination

Handled By: [ ]

Performed Date: 191110

Resolution: Sent home...no pay for the next 3 years, then we'll see what happens

Employee Comment: [ ]

By signing this notice, I am acknowledging that I have been counseled about my inappropriate conduct and informed of consequences if improvements are not made.

Sign

Employee Self Service

Search

- Employee Self Service
- Personal Information
- Profile Information
- HR Information
- W-4 Information
- Tax Information
- Emergency Contacts
- Skills
- Certification and Licenses
- Degrees
- Memberships
- Annual Evaluation
- Interim Evaluation
- Discipline History**
- Payment Administration
- Corporate Learning
- Recruiting
- Corporate Information
- Security
- Manager Self Service

Discipline History									
Transaction No	Performed Date	Type	Action	Handled By	Effective Date	Status			
12	08/Dec/2010	Written	Written	SUS-EMP-2	08/Dec/2010	Submitted			
13	08/Dec/2010	Verbal	Sent Home Without Pay	SM-EMP01	07/Dec/2010	Submitted			
7		Verbal	Written		10/Nov/2010	Submitted			
8	19/Nov/2010	Written	Sent Home Without Pay		19/Nov/2010	Submitted			
14	04/Dec/2010	Verbal	Sent Home Without Pay	SM-EMP01	03/Dec/2010	Employee Signed			

**Discipline Details**

Discipline Type:

Action Taken:

Effective Date:

Close Date:

Problem Description:

Handled By:

Performed Date:

Resolution:

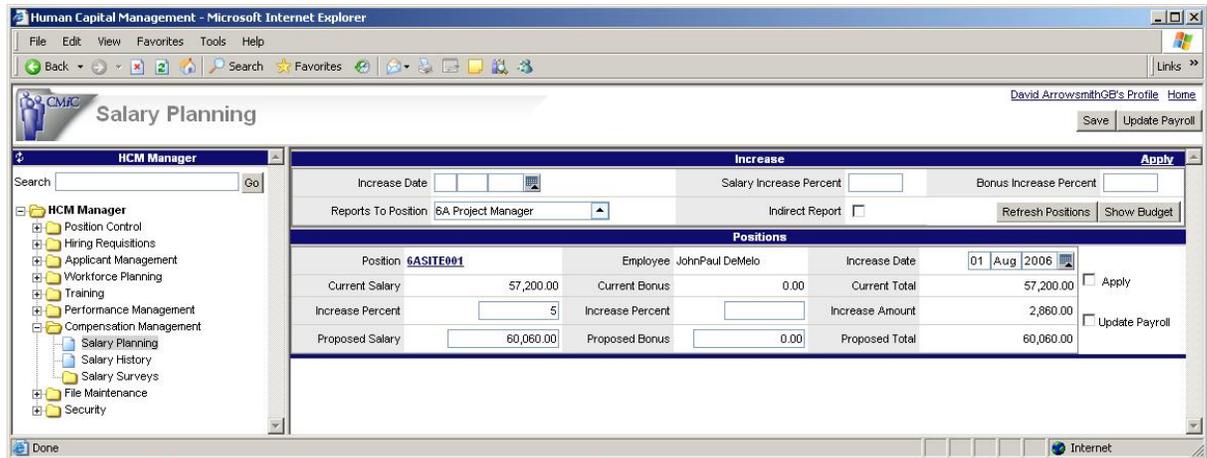
Sign Date:

Employee Comment:



# Compensation Management

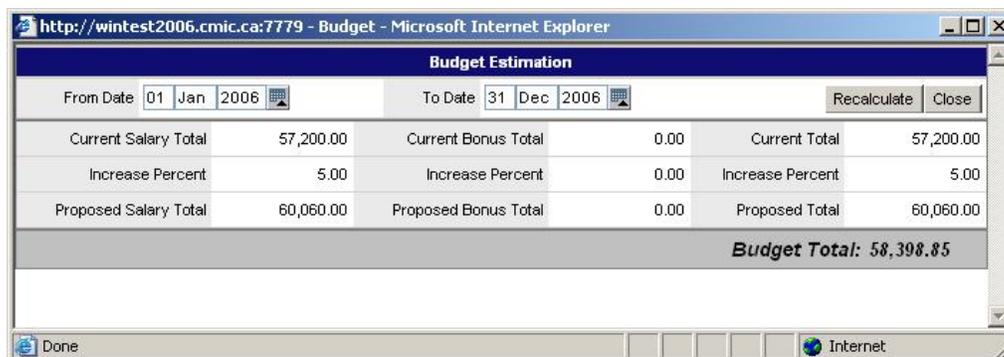
## Salary Planning



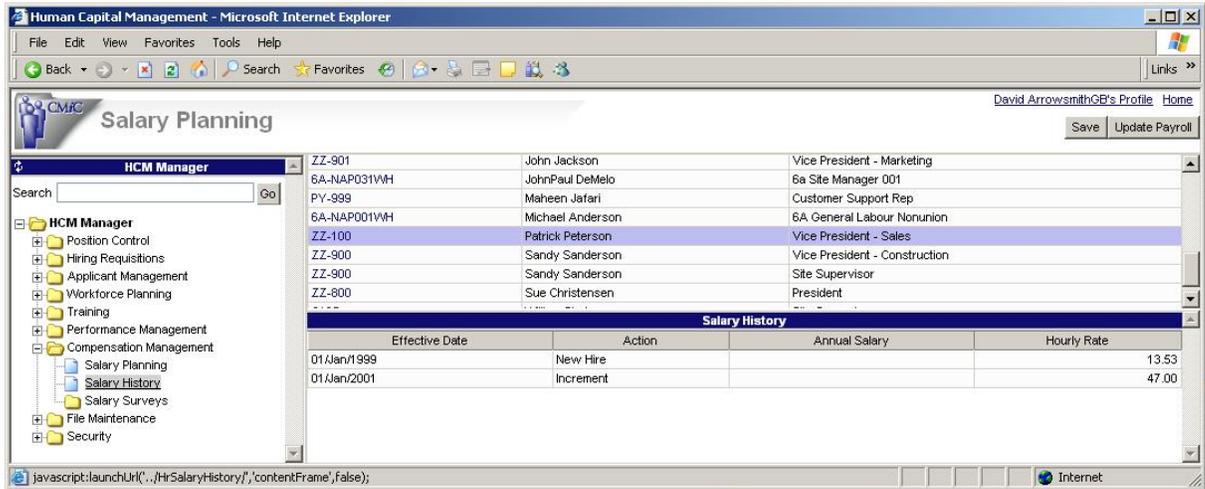
*Salary Planning Initial Display*

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.



# Salary History

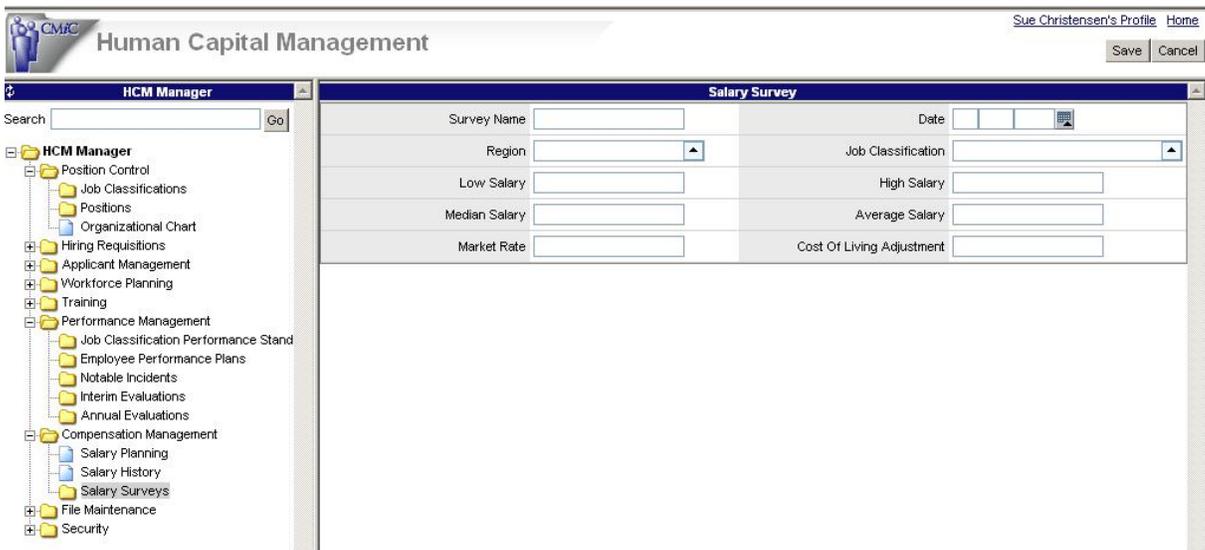


Salary Planning History Default Screen Example

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



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 3<sup>rd</sup> 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

Year		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 All	Employee No.	Employee Name	Category	Potential	Vulnerability	Forced Rating	Forced Rank Percentile	ICP Signed	Basic Wages - Enterprise			Bonus - Enterprise			Deferred Com					
									Previous	Current	Percentage	Proposed	Previous	Current	Percentage	Proposed	Previous	Current		
<input type="checkbox"/>	01012012	smith hugo	--Select--	--Select--	--Select--		--Select--													
<input type="checkbox"/>	01234	Employee Test	New Hire	Medium Potential	Medium Vulnerability		Mid	01-01-2013		0	288.46	0	2000	0	0	0	0	0		
<input type="checkbox"/>	1	Darren Billings	--Select--	--Select--	--Select--		--Select--													
<input type="checkbox"/>	100017	Leave Accrued	--Select--	--Select--	--Select--		--Select--			0	1800	0		0	0	0		0		
<input type="checkbox"/>	1001	Peterson Gerald	--Select--	--Select--	--Select--		--Select--			5240	0	-100		0	0	0		0		
<input type="checkbox"/>	1002	tezs test	--Select--	--Select--	--Select--		--Select--													
<input type="checkbox"/>	100200	TEST TEST	--Select--	--Select--	--Select--		--Select--			0	4903.86	0		0	0	0		0		
<input type="checkbox"/>	1011	Mary Gary	--Select--	--Select--	--Select--		--Select--			0	7692.3	0		0	0	0		0		
<input type="checkbox"/>	1012	test test	--Select--	--Select--	--Select--		--Select--			0	57730.74	0		0	0	0		0		
<input type="checkbox"/>	1013	test test	--Select--	--Select--	--Select--		--Select--			0	58461.48	0		0	0	0		0		
<input type="checkbox"/>	1021	Lisa Hey	--Select--	--Select--	--Select--		--Select--			1538.46	6153.84	300		0	0	0		250		
<input type="checkbox"/>	10220	Ba Ni	--Select--	--Select--	--Select--		--Select--			0	6538.48	0		0	0	0		6550		
<input type="checkbox"/>	1044214	Jeremy Forrester	--Select--	--Select--	--Select--		--Select--			2884.62	0	-100		0	0	0		0		
<input type="checkbox"/>	1044217	Antonio Banderas	--Select--	--Select--	--Select--		--Select--			17208.66	8732.76	-49.254		0	0	0		750		
<input type="checkbox"/>	1044220	Jared Cooper	--Select--	--Select--	--Select--		--Select--			22043.86	10494.25	-52.394		0	0	0		500		
<input type="checkbox"/>	1044221	Daniel Rock	--Select--	--Select--	--Select--		--Select--			19107.69	17653.8	-7.609		0	0	0		500		
<input type="checkbox"/>	1044222	Lantern Green	--Select--	--Select--	--Select--		--Select--													
<input type="checkbox"/>	1044223	Dean Harris	--Select--	--Select--	--Select--		--Select--													
<input type="checkbox"/>	1044226	West Jeremy	--Select--	--Select--	--Select--		--Select--			0	2083.33	0		0	0	0		0		
<input type="checkbox"/>	10445	Jina Gold	--Select--	--Select--	--Select--		--Select--			0	9000	0		0	0	0		0		

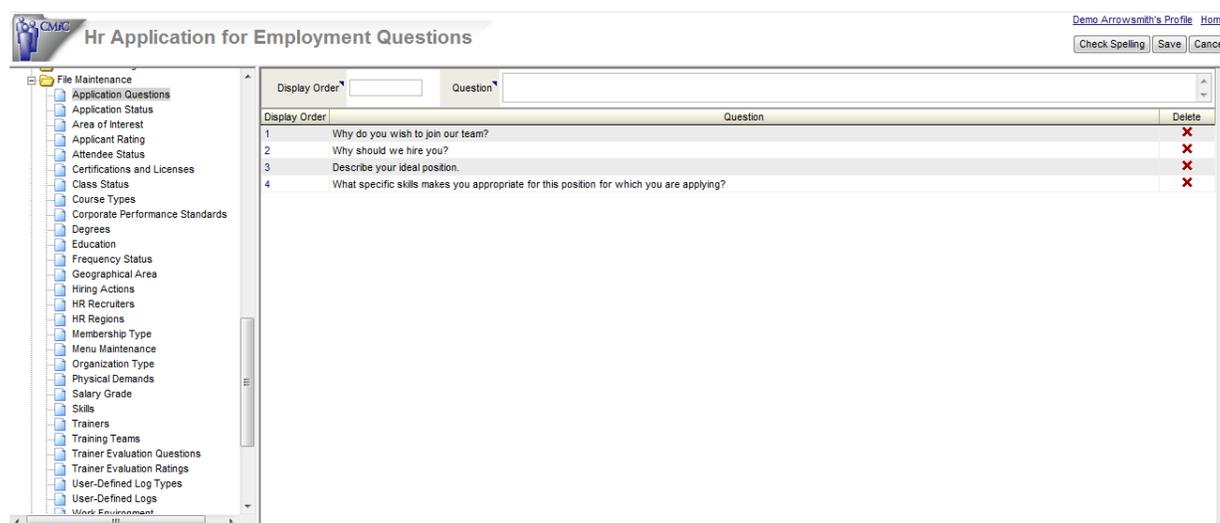
This program allows user to increase salary of employees.

# 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



Display Order	Question	Delete
1	Why do you wish to join our team?	X
2	Why should we hire you?	X
3	Describe your ideal position.	X
4	What specific skills makes you appropriate for this position for which you are applying?	X

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

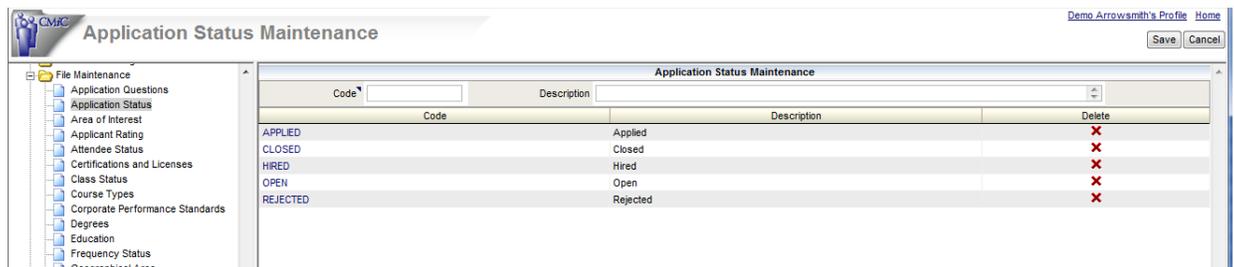
To update an existing record select the record from the list by clicking on the code field. This will highlight the complete line and place the info into an area at the top of the list where the data can be changed.

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



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.

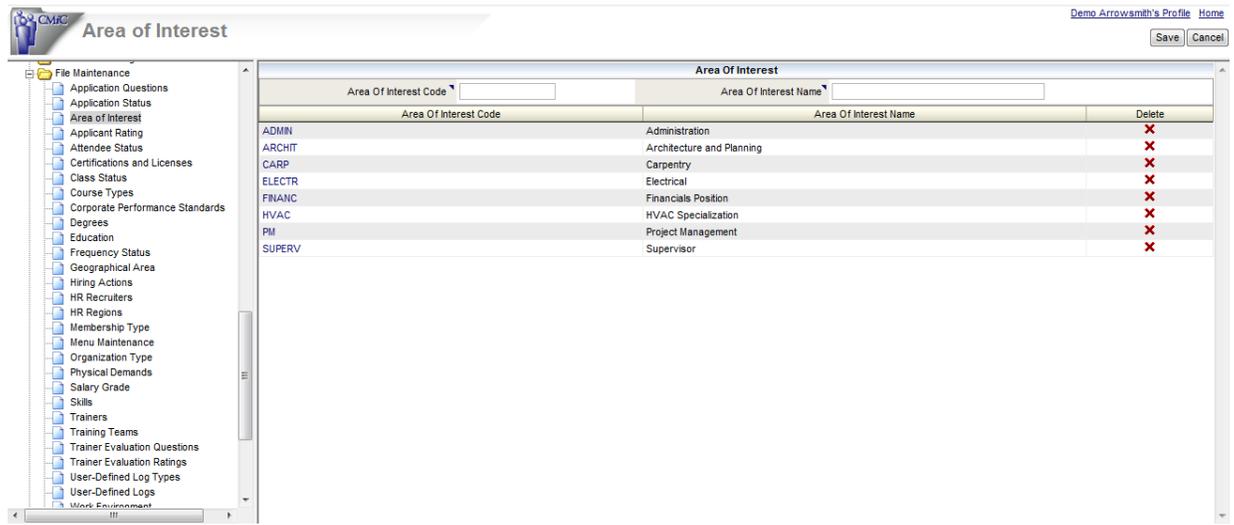
## Update or Delete an Existing Record

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.

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

# Area of Interest



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.

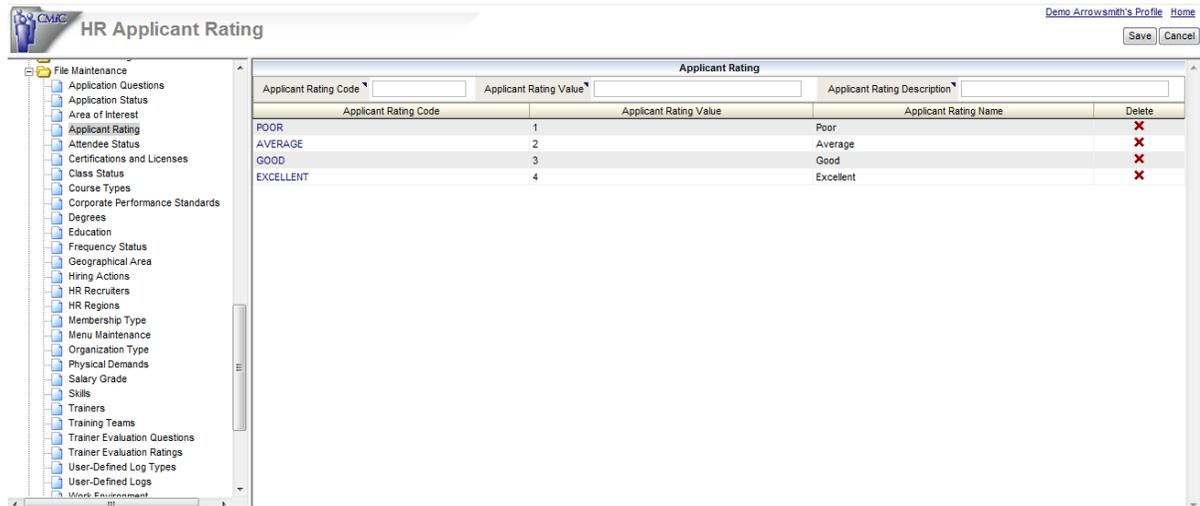
## Update or Delete an Existing Record

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.

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

# Applicant Rating



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.

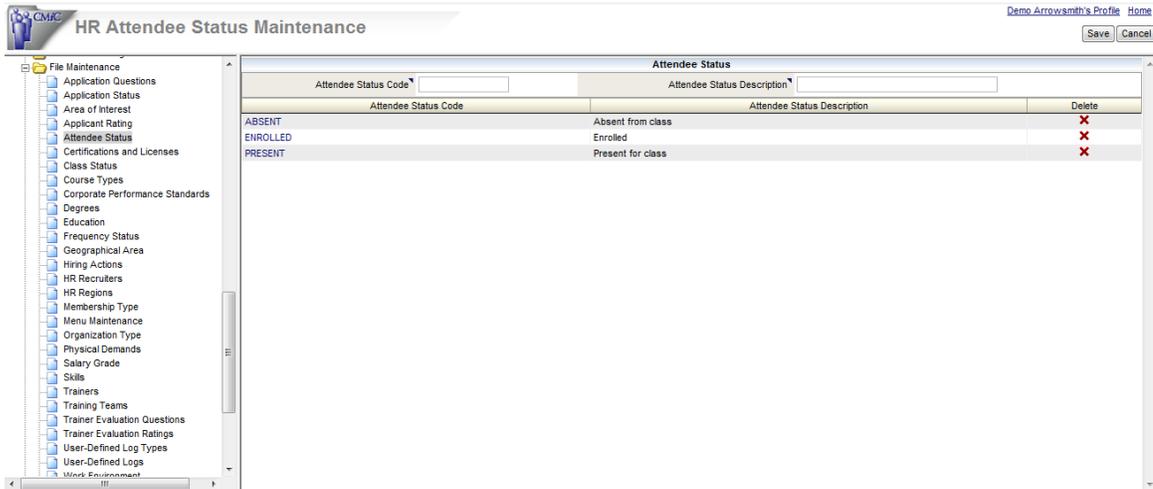
## Update or Delete an Existing Record

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.

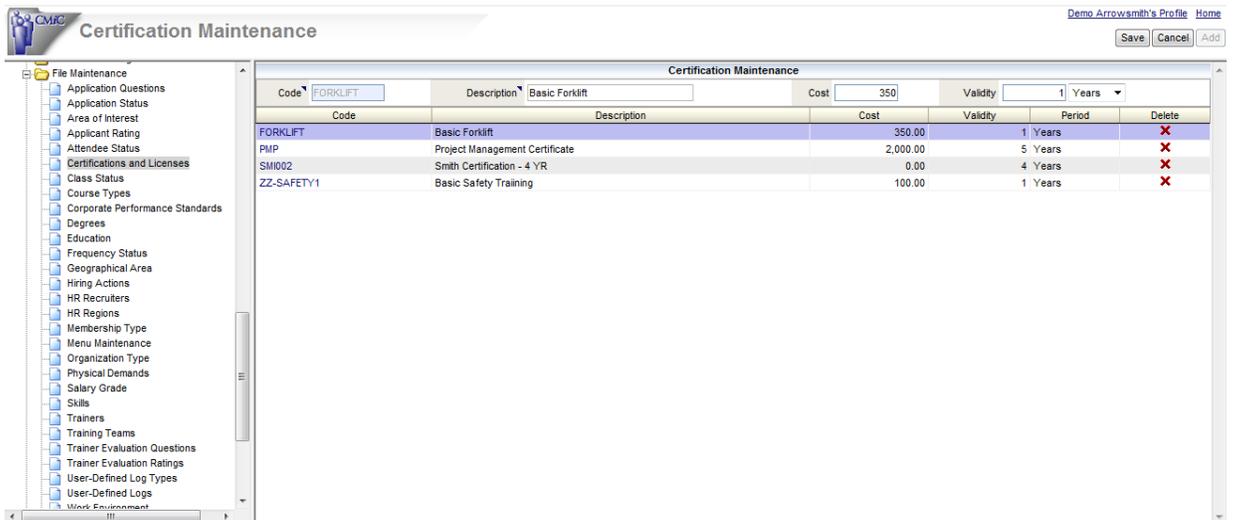
To delete the record, use the Delete Icon to remove the highlighted

# Attendee Status



This screen allows add/delete different Course Attendees statuses.

# Certifications and Licenses



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.

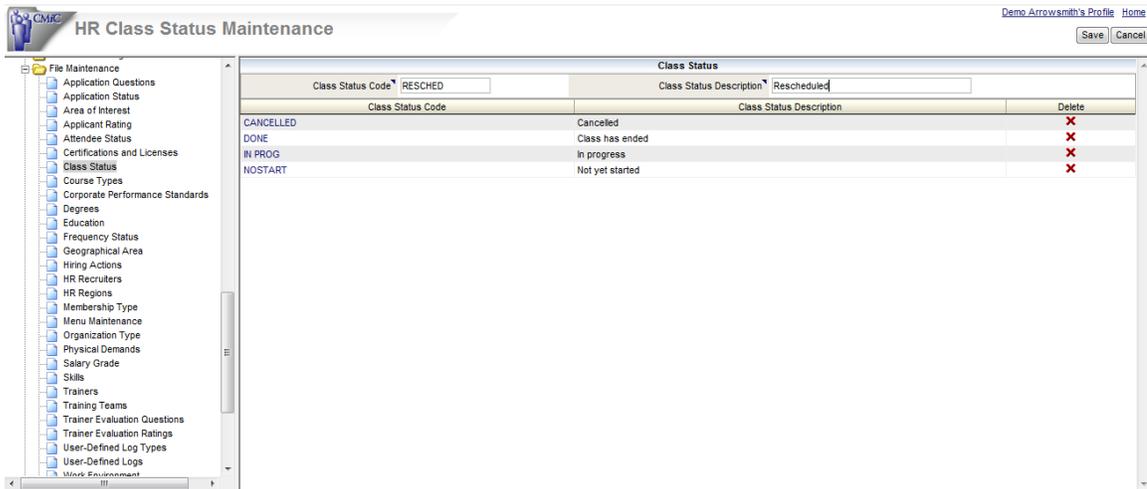
### Update or Delete an Existing Record

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.

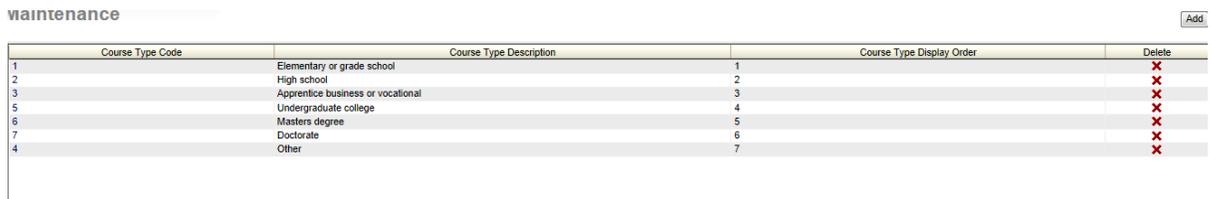
To delete the record, use the Delete Icon to remove the highlighted record.

## Class Status



This screen allows to Add/Delete different Courses Statuses.

## Course Types



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

# Corporate Performance Standards

The screenshot shows the 'Corporate Performance Standards' configuration page in the HCM Manager. The left sidebar contains a tree view with 'Corporate Performance Standards' selected. The main area is divided into two sections: 'Categories' and 'Sections'.

**Categories Table:**

Category Title	Weight	Display Order	Action
Values and Individual Behaviors	20	1	✗
Learning and Growth	25	2	✗
Demonstrated Professional Skills	30	3	✗
Superior Construction Processes	15	4	✗
Others	30	5	✗

**Sections Table:**

Section Title	Text	Display Order	Action
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 recognizes the value in donating time and talent to charitable, civic and other organizations in a way that enhances the individual, supports the community and furthers the goals of Superior Construction Inc.	1	✗
Work Ethic	Works in a organized, productive way that helps maintain proper balance between work priorities and personal priorities. Through planning and teamwork is able to accomplish tasks expeditiously and accept additional responsibilities and assignments that develop new skills and abilities.	2	✗
Support for Diversity	Demonstrates understanding of the value of diversity in all its forms in the workplace and helps promote diversity internally including managing in a fair and objective manner. Shows sensitivity to public perceptions, attitudes and concerns about diversity.	3	✗

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.

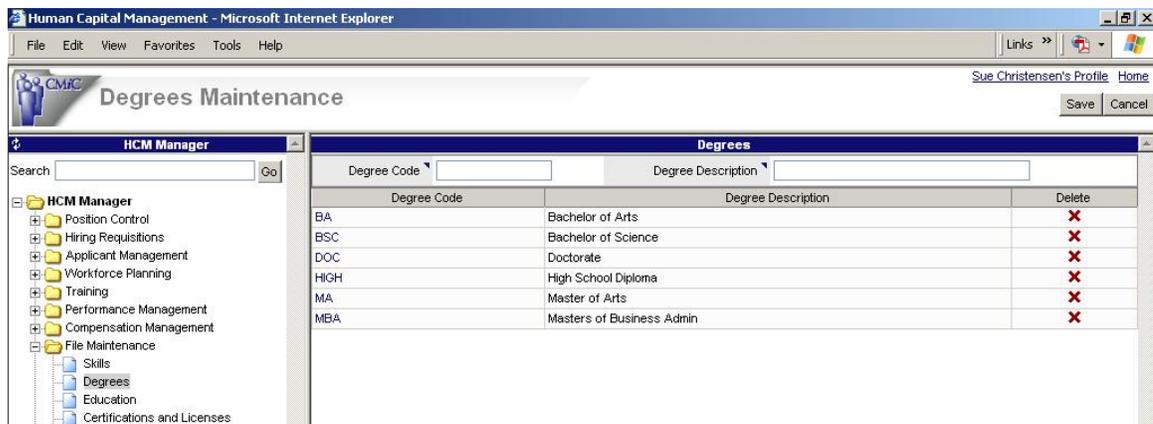
The only required field is the Section Title. Use the [**Check Spelling**] button to initiate Spell Checker on the Text field. Once done use the [**Save**] button. To exit Add Mode without saving any changes use the [**Cancel**] button.

### 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

Code	Name	Level	Delete
GRADE13	Advanced High School	High school	X
GRADE12	Basic High School	High school	X
COLLEGE-1	College One Year	Undergraduate college	X
COLLEGE-3	College Three Year	Undergraduate college	X
COLLEGE-2	College Two Year	Undergraduate college	X
PHYSICS	Physics	Undergraduate college	X
PRGRMNGV	Programming	Apprentice business or vocational	X
PRGMING	Programming	Undergraduate college	X
PSYCH	Psychology	Undergraduate college	X
GENERAL_T	Science Tech and Trades	High school	X
VOCATIONAL	Trade	Apprentice business or vocational	X
UNI-3	University 3 Year	Undergraduate college	X
UNI-5	University 5 Year	Masters degree	X
UNI-7	University 7 Year	Doctorate	X
UNI-4	University 4 year	Undergraduate college	X

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 pre-defined 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

Frequency Code	Frequency Description	Frequency Days	Delete
3-YEAR	3 Year	1095	X
5-YEAR	5 Year	1825	X
MONTHLY	Monthly	30	X
YEARLY	Yearly	365	X

# Geographical Area

Geo Area Code	Geo Area Name	Delete
CALIF	California	X
FL	Florida	X
GTA	Greater Toronto Area	X
MIDWES	Midwest USA	X
NORTHE	Northeast USA	X
NORTHW	Northwest USA	X
NYC	New York City and Area	X
SW	Southwest USA	X

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

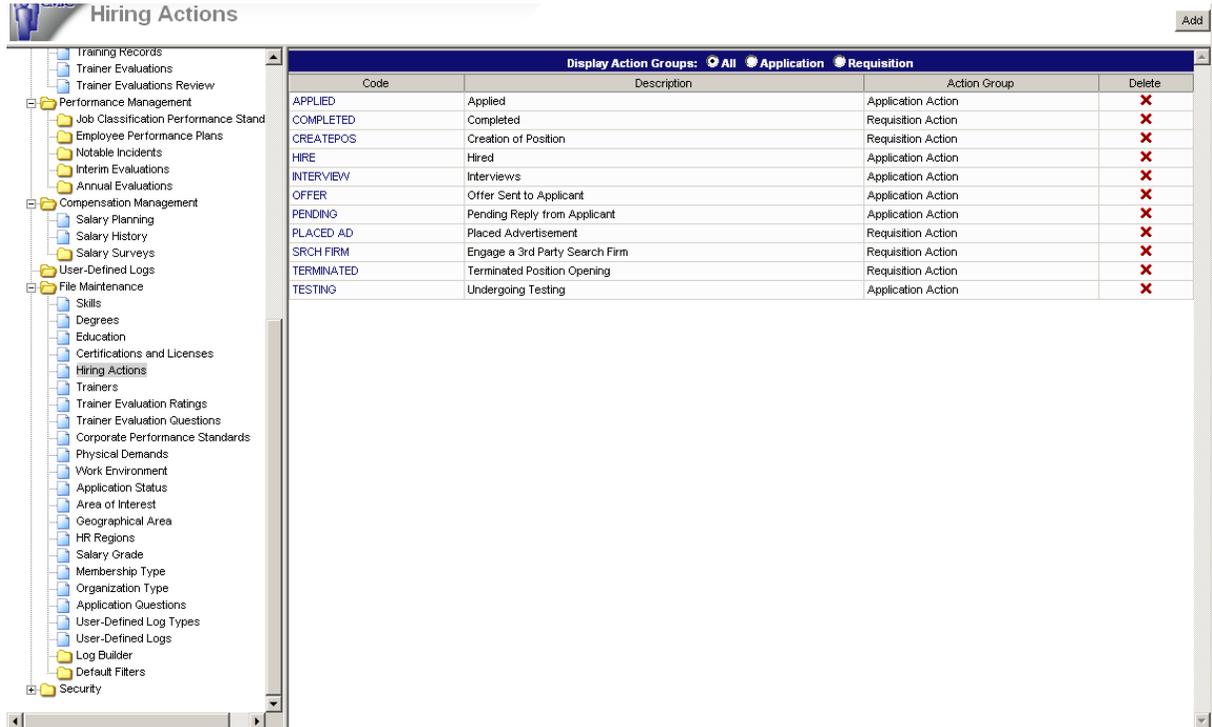
To add a new Geographical Area, click on the **[Add]** button at the top of the screen. This will open up two new fields above the list of actions already defined.

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



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.

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

# HR Recruiters

The screenshot shows the 'Recruiter Maintenance' window in the HCM Manager application. On the left is a tree view of HCM Manager modules, with 'HR Recruiters' selected. The main area contains a search bar and a table of recruiters. At the top right are 'Save' and 'Cancel' buttons.

Recruiter Oraseq	Recruiter Code	Recruiter Short Name	Recruiter Long Name	Recruiter Description	Delete
233344	EP	E. Phillipson	Edith Phillipson	Edith Phillipson - Recruiter SS	X
233341	JD	J. Drake	Jermaine Drake	Jermaine Drake - Recruiter SS	X
233343	KH	K. Heigel	Katherine Heigel	Katherine Heigel - Recruiter SS	X

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

## Adding a New HR Recruiter

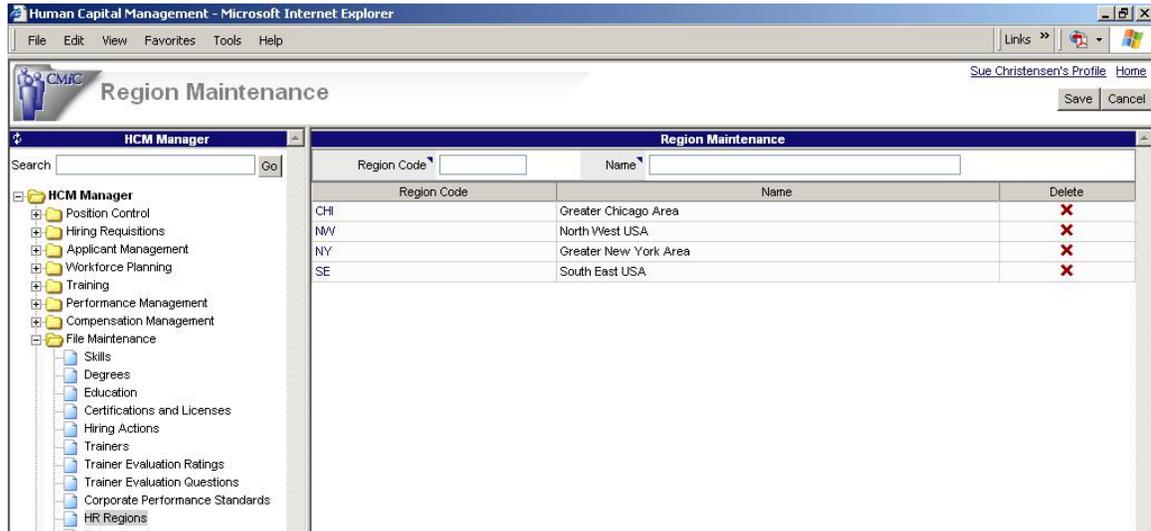
To add a new HR Recruiter, click on the **[Add]** button at the top of the screen. This will open up four new fields above the list of recruiters already defined.

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



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.

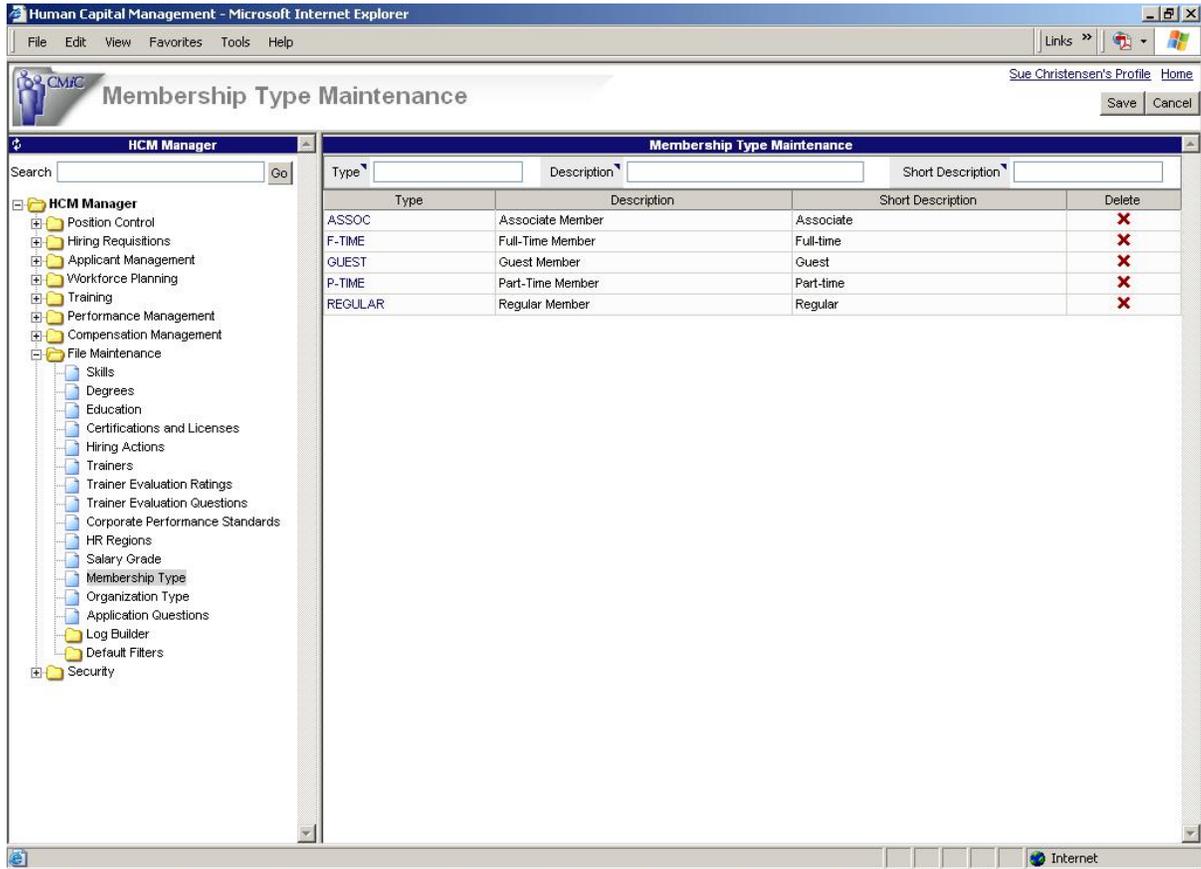
## Update or Delete an Existing Record

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.

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

# Membership Type



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.

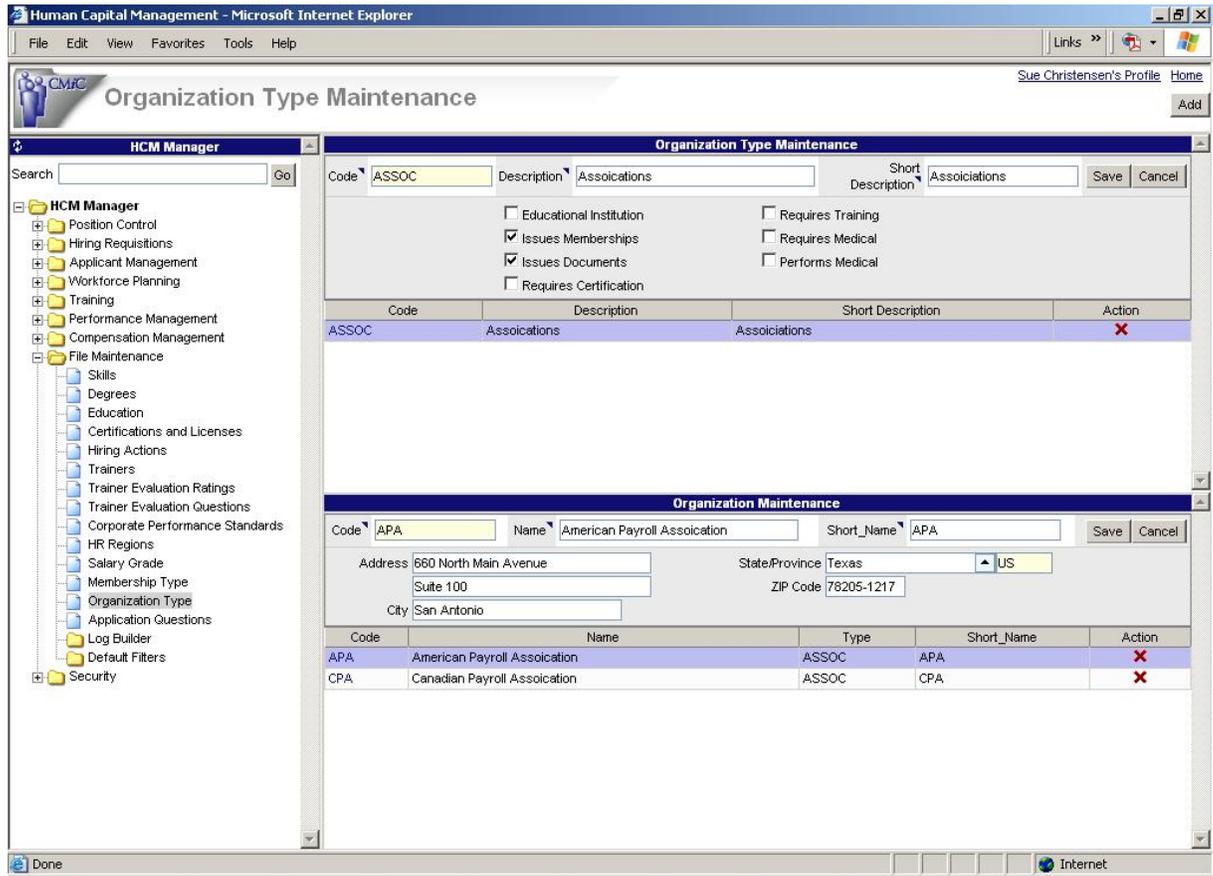
## Update or Delete an Existing Record

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.

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

# Organization Type



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 checked 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.

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

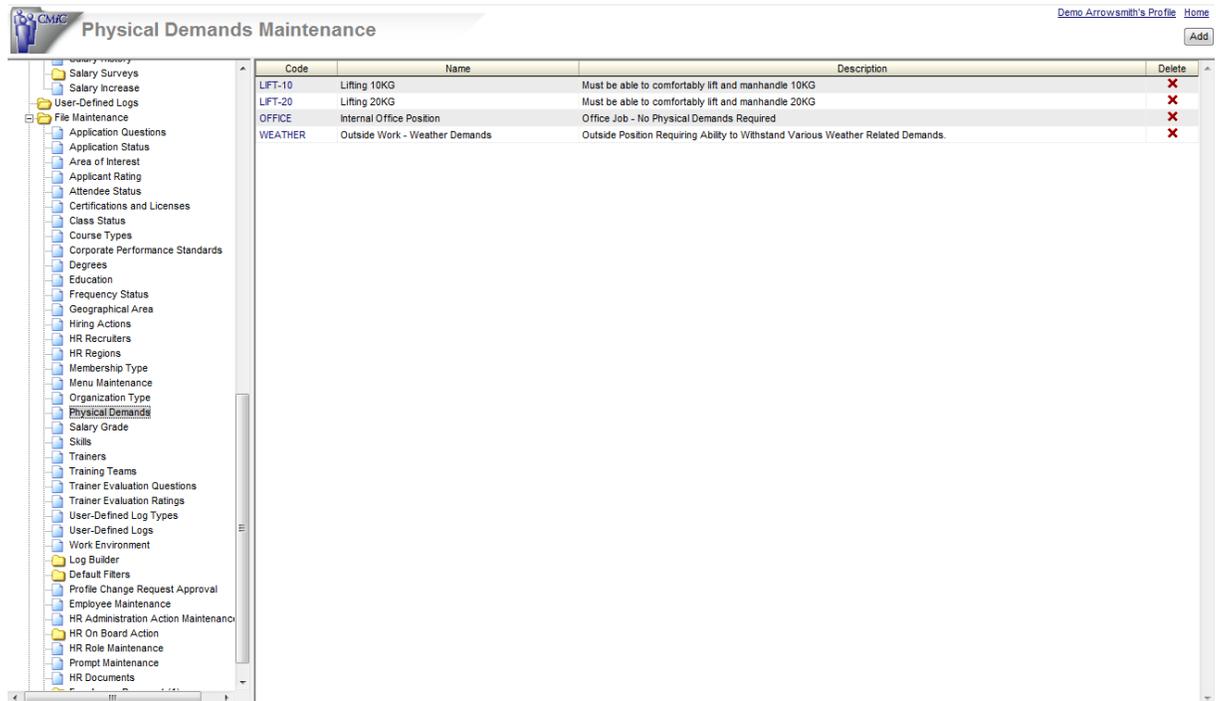
## Linking an Organization to an Organization Type

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.

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## Physical Demands



Code	Name	Description	Delete
LIFT-10	Lifting 10KG	Must be able to comfortably lift and manhandle 10KG	✗
LIFT-20	Lifting 20KG	Must be able to comfortably lift and manhandle 20KG	✗
OFFICE	Internal Office Position	Office Job - No Physical Demands Required	✗
WEATHER	Outside Work - Weather Demands	Outside Position Requiring Ability to Withstand Various Weather Related Demands.	✗

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.

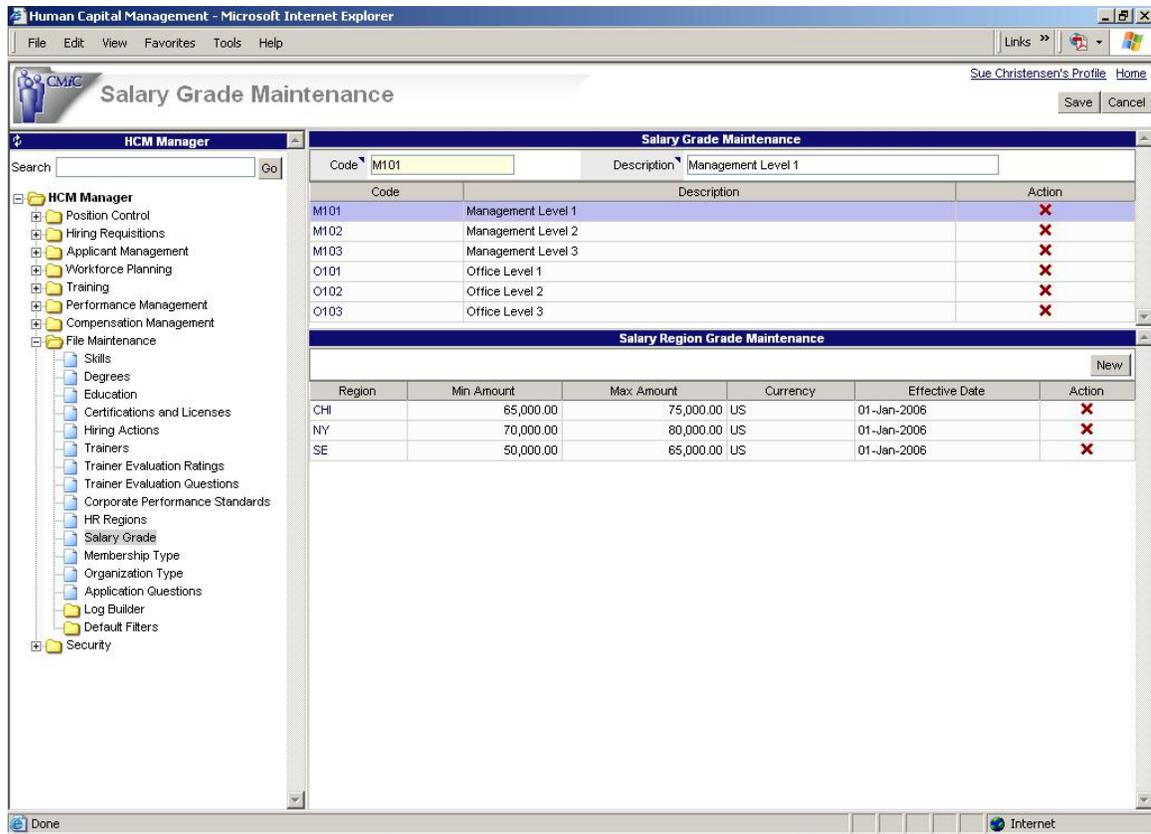
The Code and Name are required fields but the Description is not. Enter the new information and then when done use the **[Save]** button. To exit Add Mode without saving any changes use the **[Cancel]** button.

### 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



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 2<sup>nd</sup> 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

Skill Code	Skill Description	Delete
MSAPPS	Worked with Microsoft Office	✗
CMIC	Worked with CMIC Software	✗
TYPING	Typing Minimum 60 WPM	✗
ADMINASST	Previous Experience in Admin	✗
PLUMBER	Plumber	✗
MASONRY	Masonry - Brick	✗
MGMT	Management Skills	✗
GENERAL	General Labor	✗
PROGRAM	Flash Programmer	✗
DRYWALL1	Drywaller	✗
COMPUTER	Computers	✗
ZZ-CARP	Carpenter	✗
BRICK	Bricklayer	✗
ARCH	Architect	✗
APPRENTICE	Apprentice	✗

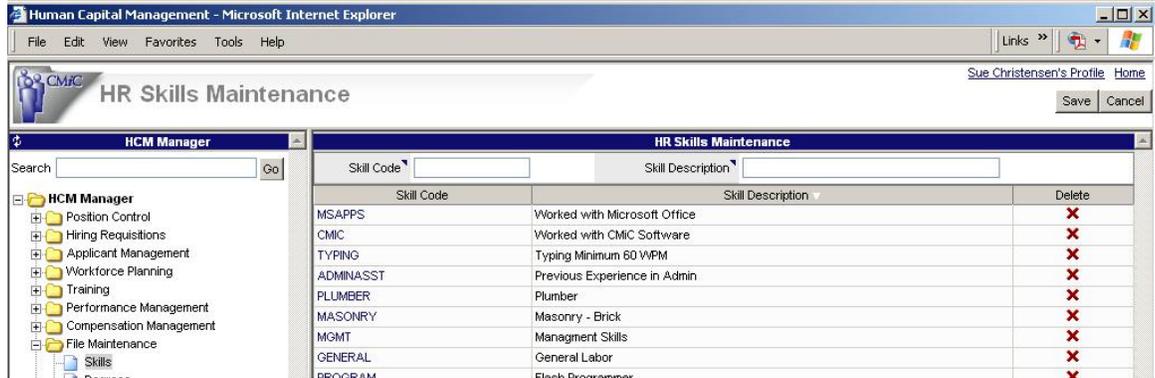
Skills can be created either via HCM or via the Enterprise HR Module. This means that when this program is first entered, there may already be data defined if the Enterprise HR Module has been utilized in the past.

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

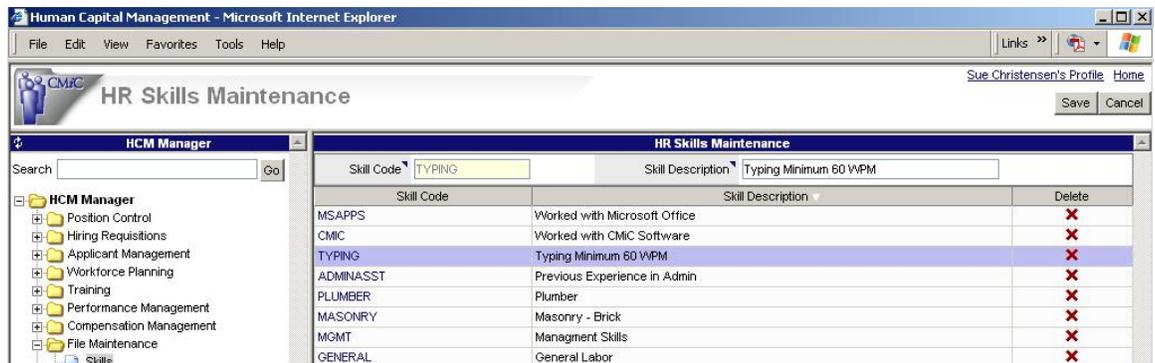
To add a new Skill use the **[Add]** button at the top of the screen. This will open up two new fields above the list of skills already defined.



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.



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



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 **[Cancel]** button.

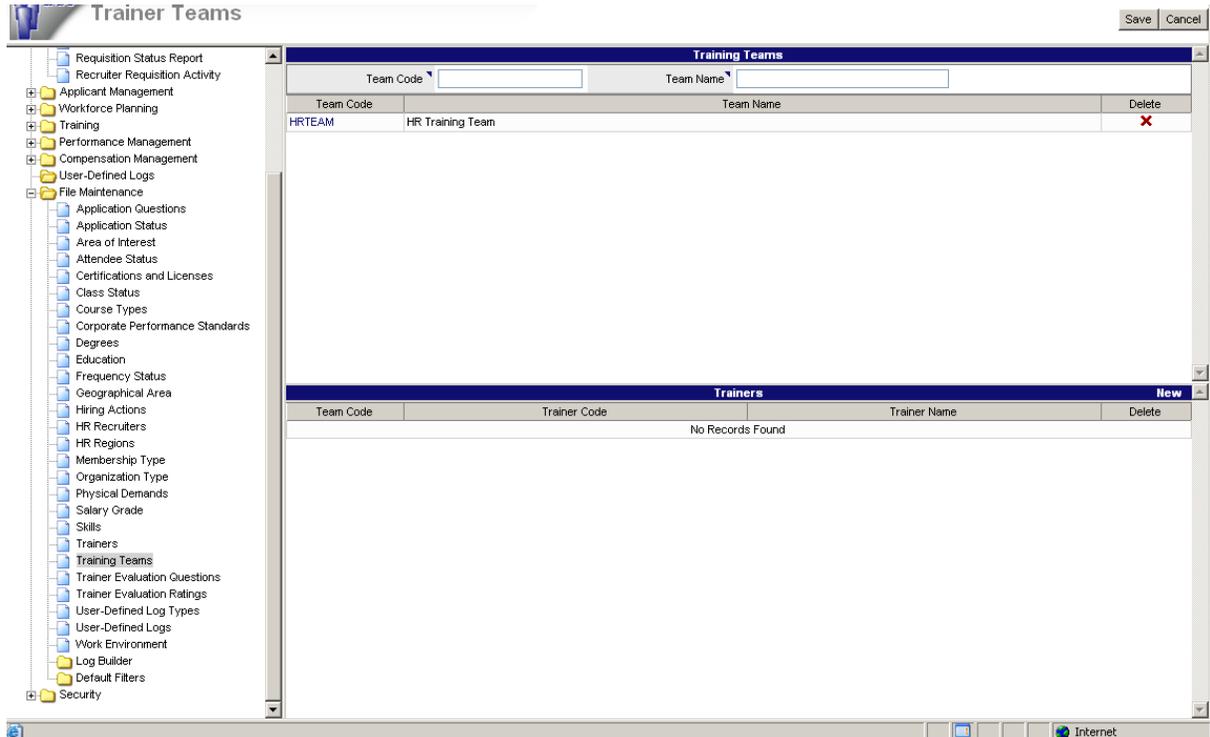
## Update or Delete an Existing Record

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.

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

# 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.

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

# Trainer Evaluation Ratings



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.

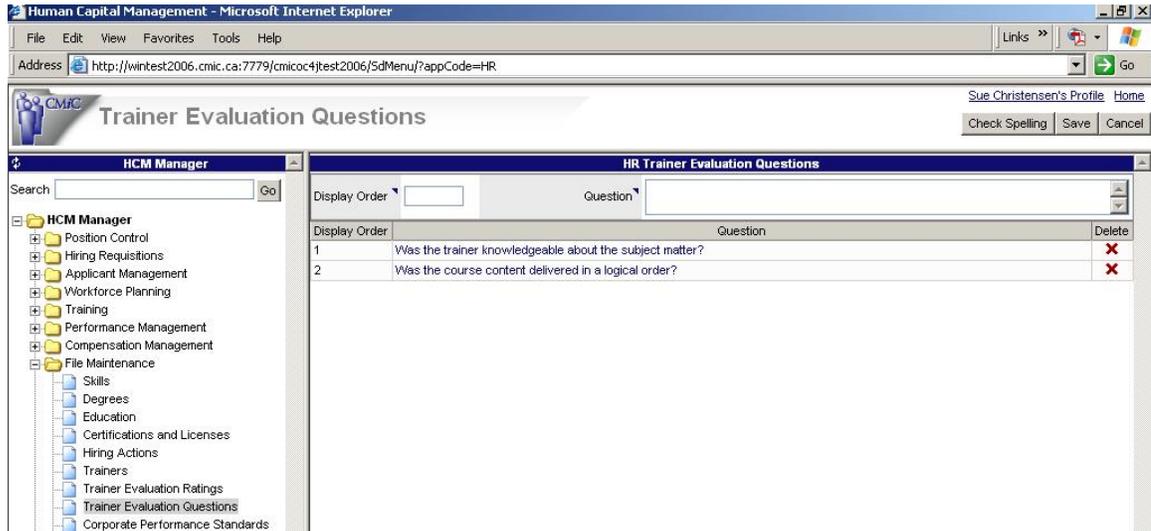
## Update or Delete an Existing Record

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.

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

# Trainer 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.

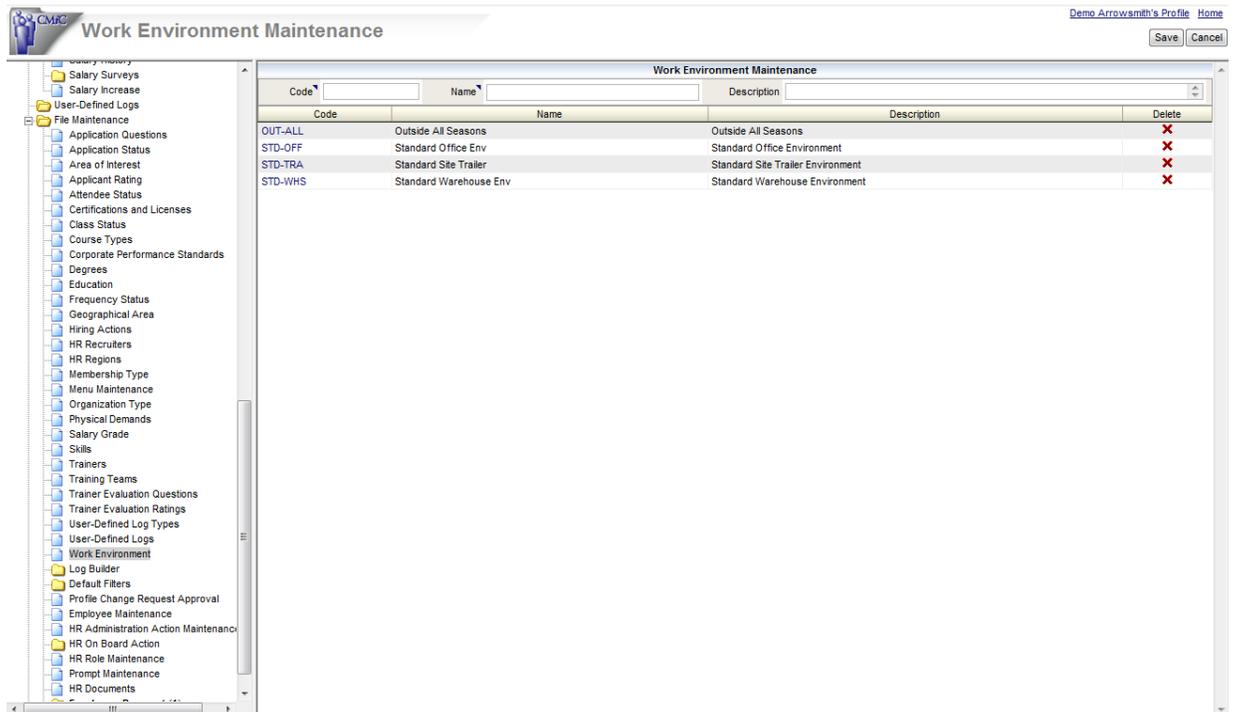
## Update or Delete an Existing Record

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.

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

# Work Environment



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.

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

# Profile Change Request Approval

Human Capital Management

Personal Information Change Request Approval

Employee Number: [ ] Date: On [ ] Request Type: [-Select-]

Request Create Date	Transaction No	Request Description	Employee Number	First Name	Last Name	Request Effective Date	Comments	Submit Status	Select All
Nov/8/2009	151	Profile	SS-WK-HR36	Fiona	Edwards	Nov/04/2008		S	<input type="checkbox"/>
Nov/8/2009	137	Skill	SS-WK-HR36	Fiona	Edwards	Jan/02/2008		S	<input type="checkbox"/>
Nov/8/2009	132	Education	SS-WK-HR37	Jessica	Lange	Nov/10/2009		S	<input type="checkbox"/>
Nov/8/2009	121	Skill	SS-WK-HR37	Jessica	Lange	Nov/03/2009		S	<input type="checkbox"/>
Nov/8/2009	110	Profile	SS-WK-HR38	Sherry	Hubbard	Nov/09/2009		S	<input type="checkbox"/>
Nov/8/2009	107	Direct Deposit	59569	Suzette	Watson	Nov/04/2009		S	<input type="checkbox"/>
Nov/8/2009	98	Membership	59569	Suzette	Watson	Nov/02/2009		S	<input type="checkbox"/>
Nov/8/2009	97	Education	59569	Suzette	Watson	Nov/02/2009		S	<input type="checkbox"/>
Nov/8/2009	83	Skill	SS-WK-HR38	Sherry	Hubbard	Sep/01/2009	skills first change	S	<input type="checkbox"/>
Nov/8/2009	76	TD1	SS-WK-HR38	Sherry	Hubbard	Jan/01/2000		S	<input type="checkbox"/>
Nov/8/2009	75	W4	SS-WK-HR38	Sherry	Hubbard	Jan/01/2000	comment for w4	S	<input type="checkbox"/>
Nov/7/2009	63	Skill	SSETM01	Dawn	Robinson			S	<input type="checkbox"/>

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

http://wintest2006.cmic.ca:7779/cmccoc4jtest2006/SsePersonalInfo/viewRequestInfo.do?empNo=SS-WK - Microsoft Internet Explorer

Transaction No: 110 Effective Date: 2009-11-18

Comments: [ ]

File Name	Upload Date	Note	Action
No Records Found			

## 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 No	First Name	Last Name	Company Code	Company	Access To Self Service	Select All
1001	Glen	Marius	ZZ	CMC ZZ Test Company	<input checked="" type="checkbox"/>	<input type="checkbox"/>
121212	Jack	Report	ZZ	CMC ZZ Test Company	<input type="checkbox"/>	<input type="checkbox"/>
123456789	Andrea	Jones	ZZ	CMC ZZ Test Company	<input checked="" type="checkbox"/>	<input type="checkbox"/>
123456789012346	Beth	Adams	vWH	vWindsor-Harrison Connection	<input checked="" type="checkbox"/>	<input type="checkbox"/>
123456789012348	Samuel	Jones	SS	SSConstruction Company	<input type="checkbox"/>	<input type="checkbox"/>
123456789012355	vWayne	Brody	SS	SSConstruction Company	<input type="checkbox"/>	<input type="checkbox"/>
123456789012359	Charlie	Lexington	SS	SSConstruction Company	<input type="checkbox"/>	<input type="checkbox"/>
123456789012361	Berry	Lucas	SS	SSConstruction Company	<input type="checkbox"/>	<input type="checkbox"/>
157468521	Morton	Kondrackie	MZ	MZ2006	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

Code	Description	Delete
DA	Database Administrator	<input checked="" type="checkbox"/>
APPR	Approver Role	<input checked="" type="checkbox"/>
SEMP	Employee Role (View/Edit)	<input checked="" type="checkbox"/>

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.

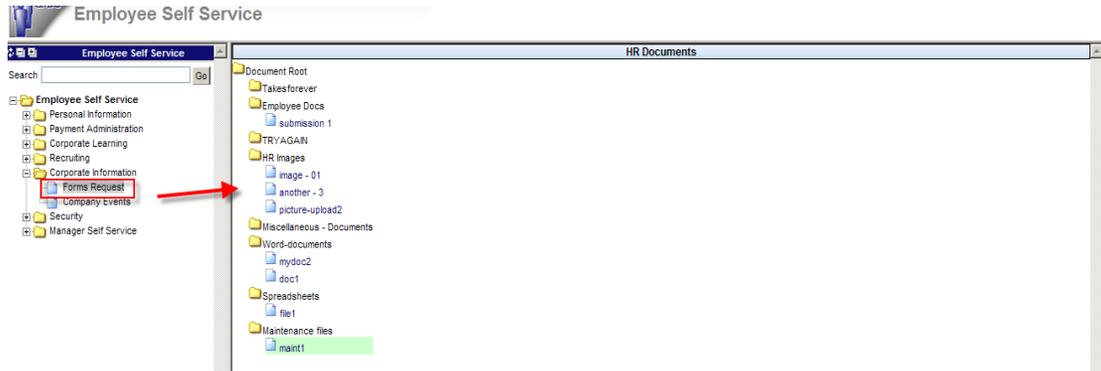
### Adding New Roles

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.



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



## Employee Request Log

agement Show Filter Send To Spreadsheet Enter Query

Employee Request						
Transaction No	Request Description	Employee No	Employee Name	Creation Date	Detail Information	Number of requests
564	Skill	595959	Suzette Watson	Apr08/2011		1
248	Profile	SS-WK-HR38	Sherry Hubbard	Sep09/2010		1
249	Profile	SS-WK-SAL44	Natalie Steeles	Sep10/2010		1
377	Skill	SS-WK-SAL44	Natalie Steeles	Nov12/2010		1
264	Profile	SS-WK-SAL38	Mickey Rooney	Sep21/2010		1
435	Membership	SS-WK-SAL49	Julian Brighton	Nov16/2010		1
426	Education	SS-WK-SAL49	Julian Brighton	Nov16/2010		1
293	Profile	SS-WK-SAL52	Josh Brown	Nov08/2010		1
224	Profile	SS-WK-HR37	Jessica Lange	Sep01/2010		1
383	Emergency Contact	SS-WK-SAL50	Jack Shaw	Nov12/2010		1
281	Profile	SS-WK-SAL40	Hazel Patton	Nov04/2010		1
573	Profile	SSEMP9ER2	Harry Perry	Apr21/2011		1
235	Profile Under Review	SS-WK-HR36	Fiona Edwards	Sep08/2010		1
516	TD1	SS-WK-SAL36	Ela Brown	Mar01/2011		1
265	Profile	SS-WK-SAL46	Elizabeth Rivers	Sep21/2010		1
299	W4	SS-WK-SAL30	Ed Knight	Nov09/2010		1
266	Profile	SS-WK-SAL35	Darrell Manson	Sep21/2010		1
454	Emergency Contact	SS-WK-SAL47	Alfred Jonas	Nov18/2010		1
246	Profile	SS-WK-SAL45	Abigail Shields	Sep09/2010		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

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**Employee Self-Service Setup**

Profile	<input checked="" type="checkbox"/> Enable Workflow
W4	<input checked="" type="checkbox"/> Enable Workflow
Contact	<input checked="" type="checkbox"/> Enable Workflow
Skills	<input checked="" type="checkbox"/> Auto Approval <input type="checkbox"/> Enable Workflow
Certificate/License	<input checked="" type="checkbox"/> Auto Approval <input type="checkbox"/> Enable Workflow
Education	<input checked="" type="checkbox"/> Auto Approval <input type="checkbox"/> Enable Workflow
Membership	<input checked="" type="checkbox"/> Auto Approval <input type="checkbox"/> 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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