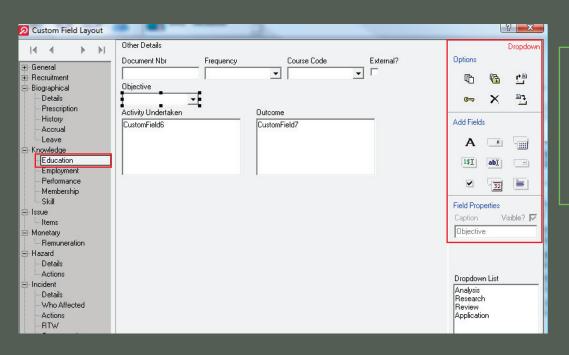




# software features and fields

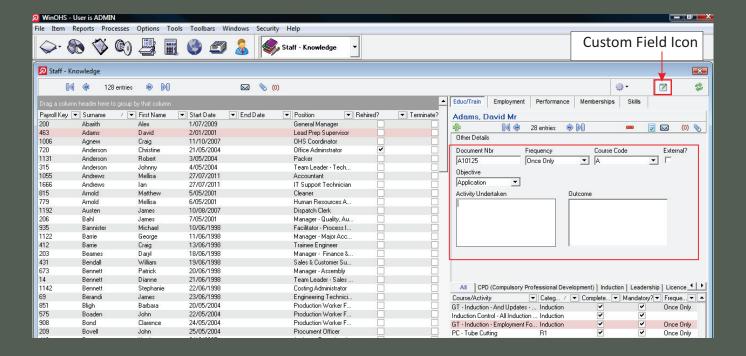
Custom Fields Creation available for every TAB throughout the product



With the use of these tools you are able to create your own customised fields for selection within the area they are set up against.

The example opposite shows new fields created against the Education tab

The screen shot below shows the custom fields displayed against the Education TAB when selected by clicking on the custom field icon



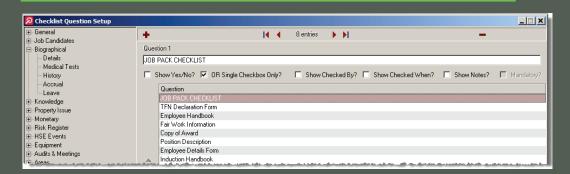




#### **Custom Checklists**

Set up your own electronic checklists to replace manual checklist forms

The example below is a checklist which has been set up against biographical history TAB in this example the checklist replaces a manual Checklist and has been customised to replace the manual form normally used to track the progress of each task

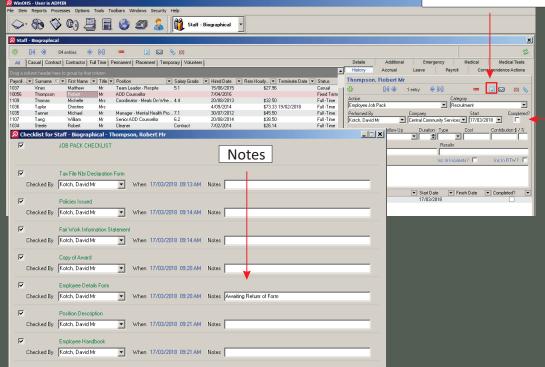


An action is selected from the drop down to control when the checklist was started and completed, or if it is still outstanding. Launching the checklist feature against this action item enables each task in the checklist to be ticked off (just as you would in a manual form), you can close the checklist and re-open it to tick off more tasks items as they are completed. The control item serves to indicate the status of the checklist overall; i.e. that it is completed or items remain outstanding.

As each task item in the checklist is ticked off the checklist records the user and the time. Note fields allow for comments about each task item. When the entire checklist is completed, the action item is marked as completed. All this allows for power reporting about the progress of such tasks, and checklists as a whole.

### **Checklist for Robert Thompson**

Launch checklist



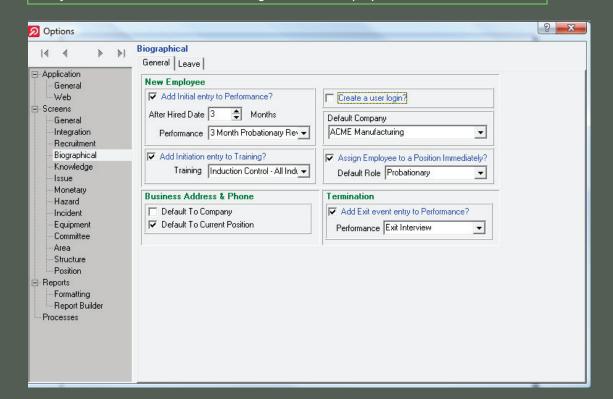
Tick box when checklist finalised





# **Process flow**

For employees entering the system, either by having been converted from an applicant to an employee, manually entered, or via payroll import, a number of actions can be auto scheduled against those employees



The selected options above will auto schedule a new employee to the following Items

Induction - An email alert can be sent to the facilitator who will perform the induction and use a custom checklist to tick off the components of the induction as they are completed.

Probationary Review - The review is auto Scheduled with the due date calculated at a predetermined period: Email alert is triggered to remind of the review.

Position Assign - A prompt to assign employee to their position

Exit Interview - When terminated an exit interview action is auto created, email alert triggered notifying manager - at this point further process can be introduced, for example the manager might then print off a list of items the employee may have been issued and email the list.





## Software Fields/Functions

## **Organisational Structure**

Manage Multiple, Divisions, Departments, Locations etc

Manage & detail the structure for Multiple Businesses, Organisations

Up to 10 levels of organisation structure for each entity

Workflow, security & access based on position hierarchy within the organisation

All Organisational sub-units, divisions, departments with created and ceased date Manage external project sites - Link to external physical locations

Views: Grid View, Tree View, Chart View

Print all Views

Company Policies & Documents

**Custom Field Creation** 

## **Positions**

**Position Number** 

**Position Start Date** 

Position End Date

**Position Title** 

Position Description - attach PD document and/or display in notes

Position Active/inactive flag

Position created date

Position ceased date - future or actual

Position Location within position hierarchy & organisational structure

Position reporting hierarchy

Position Family

Position ACSO Nbr.

Position Authorised by

Position Workers Comp %

Position FTE

Position Incumbent %

Position Current and previous incumbents

Position incumbent Type/Role

Position Incumbent start date

Position incumbent finish date - future/actual

Position Incumbent organisational chart view

**Position Notes** 

Position attachments

Position Competency, & skills requirements

Position qualifications, certificates requirements

Position bulk update skills, qualifications & competencies

Position Vacancies

Position multiple incumbents

Multiple positions (assignments) to one employee

Position last advertised

**Position Succession Planning** 

Position Skills Gap Analysis

Reports

Checklists





# **Employees**

Employee Id Employee Photo Name & Salutation Other Name

Preferred Name Previous Name Gender Indigenous flag

Multiple addresses
Multiple Phone

Class Award Pay Type DOB

Hire Date
Termination Date
Termination Reason

Rehire flag
Residency
Citizenship
Country of Birth
Marital Status
Children Names
Children Birth Dates
Passport details
Visa Details

TFN ID Documents

<u>Previous Employment History</u>

Remuneration Details

Medical history including allergies, pre-existing ailments, inoculations, and disabilities, with associated Dates

Weight, Height, Blood Group, smoker flag

Record allocation of employer equipment

and property & clothing items

Committee memberships, including roles, start and end dates

Record other organisational responsibilities including First Aid Officers,

OH&S Representatives,

& Emergency Wardens

Qualifications & Licences held, including institution,

facilitator, start date, end date, expiry date

location and physical area

Bank Accounts (3) Super Fund Name Super Provider

Year to Date - Gross - Tax - Net - Non-Tax - Super

Emergency Contacts - Multiple Special Considerations Probationary Review/Expiry Induction scheduled/Expiry

Exit Interview Interviewer

Attachment documents to employee records

Professional & Union Memberships including start and expiry dates

Checklists Reports





# **Skills & Competencies**

Scoring #

Scoring %

Gap analysis

Skill category

Skill type

Date achieved

**How Achieved** 

Expiry Date

Mandatory Flag

Reviewer

Required level

Gap Analysis

Attach underpinning documents

**Email Alerts** 

Notes

**Associated Reporting Tools** 

# **Training, Learning & Development**

Bulk assign courses

Bulk Approve

Bulk Change

Bulk Delete

Approved YES
Approved reason

Approved NO

Rejected reason

Costs & Contributions

Facilitator

Institution

Start Date, Finish Date, Duration, Expiry Date

Preferred Date

Achieve Date, Achieve Level

Attended/Completed flag

Area/Location

**Training Category** 

Progress

Mandatory Flag

Topic

Checklists

## Performance

Auto Schedule Probationary Review

**Annual Reviews** 

Exit Interviews Other Reviews

Due Date

Conducted By Conducted Date

Next Due Date

Score#

Score%

Follow Up By

Email Alerts

Attach Underlying Performance Review Template

Checklists

Purpose of the Review

Notes

Custom Fields Creation





# **Recruitment - Applicants**

Personal Details

Surname Type First Name Category Other Name Mandatory Date Achieve Preferred Name Title How Achieved Initials Score # Gender Score % Birth Date **Review Date** Age Reviewer **Previous Position** Notes Previous Employer Attachments Start Date at Previous Employer **Email Alerts** 

Address Home
Address Postal

Address Others

Multiple Customizable Correspondence Types

Correspondence

Email Primary eg. Interviews, Reference Checks

Email Secondary

Home Phone

Business Phone

Mobile Phone

Other Phones

Blacklisting

Category

Who With

When Date

When Time

Mode

Reason

Photo
Outcome - Notes
Occurred?
Email Alerts
Attachments

Process Wizard to convert applicant to employee





## **Recruitment - Candidates**

#### **Candidates**

Vacancy

Selection Stage

Achieve Date Received Date Gap Rating Type Category Category

**Current Position** Mandatory Flag **Current Employer** 

Resident Flag

**Desired Conditions Desired Salary** Add new Correspondence

Position Offered Flag Date Offered Category Rejected Flag Date Rejected When Accepted Flag Time Date Accepted Mode

Application Managed By 1 Occurred Flag Application Managed By 2 Reason Applications Managed By 3 Outcome Cover Letter Location Notes Attach Cover Letter **Email Alerts** Scan Cover Letter Attachments

Retrieve Cover letter Resume Location Reports

Attach Resume Wizards & Processes Scan Resume Retrieve Resume Covert to Employee Interview Details

Notes Reports **Email Alerts** 

Auto Calculate Skill Gaps and Display

Skill

Is a Position Required Skill Flag

## Correspondence

Type With who

Interview Confirm

Reject other Applicants Rejection Letter Offer Letter





## **Recruitment - Vacancies**

Create a Vacancy Against a Position

Job Description

Auto Reference Nbr

Stage

Type

Category

Start Date

End Date

Application Close Date

Assign Consultant/Application Manager

External Flag

Internal Flag

Both Flags

Publish Until Date

Min Education

**Experience Required** 

**Advertised With** 

Ad Sent Flag

When Sent

Costs Hyper Link to Advertised Website

Completed Flag

Notes

Display All Applicants Feature

Display Successful Applicant Feature

Show At Time Position Details

Position Id

Position

**Position Family** 

Award

Salary Low Range

Salary High Range

Work Time

Benefits

Car Required Fla

Reportsg





### Remuneration

Components

Component Effective Date
Component Expiry Date

Indicator - Current/History/Modeling

Component Amount

On-Costs % Total Costs

FBT Amount
Super Calculation
Reason for component
Pay Rate History

Salar Grade History

Notes Email Alerts Attachments Checklist

**Custom Fields Creation** 

Bulk Update Wizard for Live Updates or Modeling

Display Award/Regular Hrs Worked/

Hrs Worked Frequency/Hourly Rate/Salary/Total Super

Reports

## **Leave Management**

Leave History/Future Leave

Leave Accruals

Leave Scheduling

Leave Approval/Rejection

Submit leave request via web portal (webHR Option)

Approve leave via web portal (webHR Option)

Request Leave via web portal (webHR Option)

Multiple leave types and categories

Lost Time Cost

Other Costs

Contributions to costs

Requested by

requested date/time

Leave Status/ approved YES/NO - Taken Yes/No -Payrolled flag

Approved by

Request reason

Approve reason

Reject reason

Included in incidents flag

Notes

Reports

# **Staff Assets (Company Issued Items)**

Item Identifier Value

Issued Date
Replace By Date
Supplier Contact

Supplier Company Notes Email Alerts Checklist Attachments

**Custom Fields Creation** 

Reports





# **Incident/Hazard Management**

### Record Incident/Hazard

Case Id - Auto-Assigned or Manual

Short Description Link to Location

Link To Equipment

Exact Location Of Incident/Hazard

Incident Type Hazard Type Severity

Risk Matrix (Customisable)

Risk Ranking
Worksafe Reference
Affected Type
Agency

Nature Mechanism (Risk Source) Mechanism (Risk Source) Group

Likelihood Consequence Narrative Photo Checklists

**Customs Fields Creation** 

Attachments Email Alerts Reports

#### People Involved

Multiple Entries

Affected Body Location - Multiple entries

Proportion of Shift Worked Reporting to/Supervisor Traveling Details -Travel From Travel To Transport Mode

RTW Coordinator Assigned Flag

RTW Cordinator First Aid Flag When/who by/Where

Notes

Follow Up Care Required Flag When/Who By/Where

Votes

At Time Details - Position at time/Hourly Rate age/Gender/Pay Type/Class/Normal Hrs Worked

Salary Attachments Reports Checklists

#### **Occurrence**

Occur Dato/Time

Closed Date/Time
Assigned to
Notified Date/Time
Notified By
Created Date & Time
Witness
Statement Flag

Statement Flag Statement Date Investigated By Date Investigated Investigated by

Up to 3 additional notifiable contacts

Notes Reports

#### Return To Work

Action drop down eg. "MedCert - Unfit for Work.

Person Involved
Status of action
Action Start Date
Action Finish Date
Suitable Duties Period
Suitable Duties Period Type
Lost Time Period

Lost Time Period Lost Time Period Type Action Contact Person

Company
Insurer Notified Flag Yes/No

Certifcate Forwarded Flag When Forwarded Who Forwarded To Include In history Flag At Time details Button Record Suitable Duties Plan

Notes
Email Alerts
Checklist
Custom Fields Creation
Attachments

Attachme Reports





# **Incident/Hazard Management**

#### **Corrective Actions**

Action drop down - Customisable entries

**Action Reason** 

Action Hierarchy of Control Action Performed By Performed by Company People Involved in action

Action Start Date
Action Start Time
Action End Date
Action End Time
Duration
Duration Type
Coordinator of Action

Cost

Contribution to Cost Lost Time Amount Lost Time Type Completed flag Completed Date

Inc in Measure Calculation Flag

Evaluated Flag Root Cause fields

Include in Compensation Flag

(Carries a copy of action across to Compensation)

Include in Employee History Flag

(Carries a copy of action item across to employee history)
Include in Leave Flag ( Carries a copy across to Leave History)

Notes

Email Alerts

Attachments

Checklists

Custom Fields Creation

## Compensation

Action drop down eg. Claim Lodged Person Involved drop down selection

Status
Claim Nbr
Claim Contact
Claim From Company
Notified on Date
Lodged on Date

Authorised by Cost

Contribution

Insurance Paid Amount
Insurer date Paid
Rejected Flag
Email Alerts
Checklist

**Custom Fields Creation** 

Attachment Reportss





# **Risk Register**

Activity/Event Short Description Id (Auto Generate Option)
Photo

Link to Area where activity/Event normally takes place

Link to Equipment

**Event Type** 

Risk Matrix

Original Risk Level

Residual Risk Level

Priority

Likelihood

Consequence

Reported Date

Reported Time

Reported By

Reported To

Owner

Closed Date

Closed Time

Closed By

Notes

Checklist Email Alerts

Custom Fields Creation

Attachment

Reportss

#### Risk Treatment

Action Type

Action Start Date

Action Finish Date

Duration & Type Hazards Involved

Risks

Risk Controls - Existing

Risk Controls - Additional

Recommendations

Risk Control Hierarchy

Control Performed By

Performed By Company

Costs

Completed Flag

Notes

Email Alerts

Checklist

Custom Fields Creation

Attachments

Linked Incidents

Reports





# **Equipment Register**

## **Equipment Details**

**Equipment Description** 

Link to Area
Photo
Category
Serail Nbr
Asset Nbr
Purchased Date
Purchased By

Purchased By
Cost
Replace Date
Retire Date
Supplier Contact
Supplier Company
Warranty Period
Warranty Period Type
Warranty Type
Notes Checklist
Custom Fields Creation

Email Alerts Attachments Reports

# **Equipment History**

Action

Action Category

Cost Star Date Finish Date Duration

Duration Type Completed Flag Assigned To

Assigned To Company

Coordinator Results Notes Checklist

**Custom Fields Creation** 

Email Alerts Attachment Reports





#### **Committees**

Committee Name Reports To Area Notes Positions

Position Start Date Position Finish Date

Role Incumbent

**Incumbent Company** 

Position with Company at the start of Committee Tenure

Notes Email Alerts Attachments Checklist

**Custom Fields Creation** 

Reports

### **Audits/Inspections Details**

Audit Type
Audit Category
Audit Id
Start Date
Finish Date
Duration
Duration Type
Cost

Contributions to Cost Performed By Company Forwarded Date Follow Up By Follow Up Date

Issues/Non Conformance Flag

Area Notes Email Alerts Attachments Custom Fields Checklists Reports

#### Meetinas

Meeting Type
Minutes Location
Start Date
Start Time
Finish Date
Finish Time
Duration
Duration Type
Notes
Email Alerts
Attachments

**Custom Fields Creation** 

Reports

Checklists

## **Audits/Inspections Corrective Actions**

Issue/Non Conformance Description

Source
Category
Type
Reported On
Reported by
Audit Nbr
Location
Priority
Due Date
Assigned to
Resolved Date

Corrective action details

Email Alerts for Overdue Actions

Checklists
Attachments
Custom Fields
Reports