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software features and fields

Custom Fields Creation available for every TAB throughout the product

Custom Field Layout

Other Details

Document Nbr Frequency Course Code External?

Objective

Activity Undertaken Outcome

CustomField6 CustomField7

Options

Add Fields

Field Properties

Caption Visible? ☒

Objective

Dropdown List

Analysis
Research
Review
Application

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

WinOHS - User is ADMIN

File Item Reports Processes Options Tools Toolbars Windows Security Help

Staff - Knowledge

Custom Field Icon

Staff - Knowledge

128 entries

Drag a column header here to group by that column

Payroll Key	Surname	First Name	Start Date	End Date	Position	Rehired?	Terminate?
200	Abarith	Alex	1/07/2009		General Manager		
463	Adams	David	2/01/2001		Lead Prep Supervisor		
1006	Agnew	Craig	11/10/2007		OHS Coordinator		
720	Anderson	Christine	21/05/2004		Office Administrator		
1131	Anderson	Robert	3/05/2004		Packer		
315	Anderson	Johnny	4/05/2004		Team Leader - Tech...		
1055	Andrews	Melissa	27/07/2011		Accountant		
1666	Andrews	Ian	27/07/2011		IT Support Technician		
815	Arnold	Matthew	5/05/2001		Cleaner		
779	Arnold	Melissa	6/05/2001		Human Resources A...		
1192	Austen	James	10/08/2007		Dispatch Clerk		
206	Bahl	James	7/05/2001		Manager - Quality, Au...		
935	Bannister	Michael	10/06/1998		Facilitator - Process I...		
1122	Barrie	George	11/06/1998		Manager - Major Acc...		
412	Barrie	Craig	13/06/1998		Trainee Engineer		
203	Beames	Daryl	18/06/1998		Manager - Finance &...		
431	Bendall	William	19/06/1998		Sales & Customer Su...		
673	Bennett	Patrick	20/06/1998		Manager - Assembly		
14	Bennett	Dianne	21/06/1998		Team Leader - Sales ...		
1142	Bennett	Stephanie	22/06/1998		Costing Administrator		
69	Berandi	James	23/06/1998		Engineering Technici...		
851	Bligh	Barbara	20/05/2004		Production Worker F...		
575	Boaden	John	22/05/2004		Production Worker F...		
908	Bond	Clarence	24/05/2004		Production Worker F...		
209	Bovell	John	25/05/2004		Procurement Officer		

Adams, David Mr

28 entries

Other Details

Document Nbr Frequency Course Code External?

A10125 Once Only A

Objective

Application

Activity Undertaken Outcome

CPD (Compulsory Professional Development) Induction Leadership Licence

Course/Activity Cate... Complete... Mandatory? Freque...

GT - Induction - And Updates - ... Induction ☒ ☒ Once Only

Induction Control - All Induction ... Induction ☒ ☒ Once Only

GT - Induction - Employment Fo... Induction ☒ ☒ Once Only

PC - Tube Cutting R1 ☒ ☒ Once Only



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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

The screenshot shows the 'Checklist Question Setup' window. On the left is a tree view with categories: General, Job Candidates, Biographical (expanded), Knowledge, Property Issue, Monetary, Risk Register, HSE Events, Equipment, Audits & Meetings, and Areas. Under 'Biographical', there are sub-items: Details, Medical Tests, History, Accrual, Leave, and Induction. The main area shows 'Question 1' with the title 'JOB PACK CHECKLIST'. Below the title are checkboxes for 'Show Yes/No?', 'OR Single Checkbox Only?' (checked), 'Show Checked By?', 'Show Checked When?', 'Show Notes?', and 'Mandatory?'. A list of tasks is shown below: 'JOB PACK CHECKLIST', 'TFN Declaration Form', 'Employee Handbook', 'Fair Work Information', 'Copy of Award', 'Position Description', 'Employee Details Form', and 'Induction Handbook'.

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

The screenshot shows the 'Staff - Biographical' window for Robert Thompson. The window has a menu bar (File, Item, Reports, Processes, Options, Tools, Toolbars, Windows, Security, Help) and a toolbar. Below the toolbar is a table of staff members. The 'Thompson, Robert Mr' entry is selected. To the right of the table is a 'Details' panel for Robert Thompson, showing his position as 'Team Leader - Recycle', salary grade '5.1', hire date '15/06/2015', and other details. Below the table is a 'Checklist for Staff - Biographical - Thompson, Robert Mr' window. This window has a 'Notes' tab and a list of tasks. The tasks are: 'Tax File Nbr Declaration Form', 'Policies Issued', 'Fair Work Information Statement', 'Copy of Award', 'Employee Details Form', 'Position Description', and 'Employee Handbook'. Each task has a 'Checked By' field (all set to 'Kotch, David Mr'), a 'When' field (all set to '17/03/2018'), and a 'Notes' field. The 'Employee Details Form' task has the note 'Awaiting Return of Form'. A red arrow points from the 'Launch checklist' text to the 'Launch checklist' button in the 'Details' panel. Another red arrow points from the 'Tick box when checklist finalised' text to the 'Completed?' checkbox in the 'Details' panel.

Tick box when
checklist finalised



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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.



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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	Bank Accounts (3)
Employee Photo	Super Fund Name
Name & Salutation	Super Provider
Other Name	Year to Date - Gross - Tax - Net - Non-Tax - Super
Preferred Name	Emergency Contacts - Multiple
Previous Name	Special Considerations
Gender	Probationary Review/Expiry
Indigenous flag	Induction scheduled/Expiry
Multiple addresses	Exit Interview
Multiple Phone	Interviewer
Class	Attachment documents to employee records
Award	Professional & Union Memberships including start and expiry dates
Pay Type	Checklists
DOB	Reports
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	
Previous Employment History	
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	



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
First Name
Other Name
Preferred Name
Title
Initials
Gender
Birth Date
Age
Previous Position
Previous Employer
Start Date at Previous Employer
Address Home
Address Postal
Address Others
Email Primary
Email Secondary
Home Phone
Business Phone
Mobile Phone
Other Phones
Blacklisting
Photo
Notes

Skills

Type
Category
Mandatory
Date Achieve
How Achieved
Score #
Score %
Review Date
Reviewer
Notes
Attachments
Email Alerts

Correspondence

Multiple Customizable Correspondence Types
eg. Interviews, Reference Checks
Category
Who With
When Date
When Time
Mode
Reason
Outcome - Notes
Occurred?
Email Alerts
Attachments
Process Wizard to convert applicant to employee



Recruitment - Candidates

Candidates

Vacancy
Selection Stage
Received Date
Rating
Category
Current Position
Current Employer
Resident Flag
Desired Conditions
Desired Salary
Position Offered Flag
Date Offered
Rejected Flag
Date Rejected
Accepted Flag
Date Accepted
Application Managed By 1
Application Managed By 2
Applications Managed By 3
Cover Letter Location
Attach Cover Letter
Scan Cover Letter
Retrieve Cover letter
Resume Location
Attach Resume
Scan Resume
Retrieve Resume
Interview Details
Notes
Reports
Email Alerts

Skills

Auto Calculate Skill Gaps and Display
Skill
Achieve Date
Gap
Type
Category
Mandatory Flag
Is a Position Required Skill Flag

Correspondence

Add new Correspondence
Type
Category
With who
When
Time
Mode
Occurred Flag
Reason
Outcome
Notes
Email Alerts
Attachments
Interview Confirm
Reports

Wizards & Processes

Covert to Employee
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



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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



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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 Coordinator
First Aid Flag
When/who by/Where
Notes
Follow Up Care Required Flag
When/Who By/Where
Notes
At Time Details - Position at time/Hourly Rate
age/Gender/Pay Type/Class/Normal Hrs Worked
Salary
Attachments
Reports
Checklists

Occurrence

Occur Date/Time
Closed Date/Time
Assigned to
Notified Date/Time
Notified By
Created Date & Time
Witness
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 Type
Action Contact Person
Company
Insurer Notified Flag Yes/No
Certificate 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
Reports



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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
Serial Nbr
Asset Nbr
Purchased Date
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

Meetings

Meeting Type
Minutes Location
Start Date
Start Time
Finish Date
Finish Time
Duration
Duration Type
Notes
Email Alerts
Attachments
Checklists
Custom Fields Creation
Reports

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