LOCAL GOVERNMENT HUMAN RESOURCE MANAGEMENT INFORMATION SYSTEM (LGHRIS)

USER MANUAL

Version 3.1
October, 2011
UDSM – THRP

Table of Contents

Introduction to LGHRIS

Understanding the LGHRIS

LGHRIS is a human resources management tool that enables the Prime Minister's Office – Regional Administration and Local Government (PMO-RALG) to design and manage a comprehensive human resources strategy. LGHRIS helps PMO-RALG manage its workforce more effectively and efficiently, while reducing costs and data errors. Using the system, the HR professional can create a hierarchy of positions for an organization (LGA) based on standard titles, Designation classifications and Designation descriptions, even spread over diverse geographic locations, offices and facilities. HR staff can solicit Designation applications for open positions, assign employees to fill positions and maintain a searchable database of all employees, their identifying information and their qualifications. Managers can track each employee's history with the organization (LGA), including their position and salary histories, and record the reason for departure when the employee leaves.

A decision maker within the organization (LGA) can analyze this data to answer key human resource management and policy questions, such as:

- Are employees deployed in positions that match their qualifications and education?
- Are employees optimally deployed in locations to meet needs?
- How many workers need to be recruited to fulfill anticipated vacancies?
- Are pay rates equitable across similar Designations?
- Are employees being promoted in alignment with competencies?
- What are the reasons for employee attrition?

The front page of the system where users will be allowed to access the system after being given credentials. Shortly username and password for each user is required.

Fig. 1 This is the login page where a user will be required to enter his/ her username and password	**Fig 2** After entering in the system you can change your password by clicking Change Password and complete the fields and then click change password button to change your password. ***Fig. 3***

Part I : Standard Lists

1.0 Administration of Standard List

The standard list are list of events that are well known and rarely changes their status. In LGHRS the standard list has been divided into two categories the centralized standard list and decentralized standard list.

1.0.1 *Centralized Standard List*

The centralized standard list are common list for all units and site of an organization. They are dictated entered at one point to ensure uniformity to all sites within an organization (PMO-RALG) structure. These will not be entered at the LGAs level instead they will come as part of the system. The centralized standard list includes the following

- Cadres
- Designation Classifications, Designation/Designations
- Salary Scales/Grades
- Terms of Employments
- Office/Work Station Type
- Departments
- Registration Councils/Boards
- Country, Region, Districts, Ward, Village etc
- Education Type, Education Level

- Language, Identification Type, Benefit Type, Reason for Departure
- Leave Type, Disabilities

1.0.2 ***Decentralized Standard List***

This list will be administered at LGAs level. The list includes the following

- Office/Work Station
- Position (by Office/Work Station)
- Planning Informations
- Establishment Type, Establishment Period and Establishments
- Competency (OPRAS) Evaluation
- Competency Type, Competency , Competency Evaluation
- Training Course Information
- Training Courses, Schedule Training Course, Status of Training Course, Requestors of Training Course etc
- Other Standard List Data Which must be entered first before being used in employee's records are
- Leave Type, Discipline Action Type, Discipline Action Reason, Accident Type etc

1.1 Adding Office/Workstation and Position

1.1.1 Add Office/Work Station

Add all offices or facilities that are found or managed in/by your organization (LGA), you may add each one to the system in order to link positions to the offices or facilities where they are located. You may also update information about an office or Work Station if it changes. Don't forget your organization (LGA) headquarters.

From the home page (*if you are not at home page click home on the far top at left*) , click Configure System then click Administer Database In the "**Organization Lists**" section, select Office/Work Station.	
The Office/Work Station page opens. Click Add New Office/Work Station.	
The Office/Work Station form opens Enter the **Name** of the office or Work Station. Select a **Work Station Type** for the office or Work Station. Enter the **Contact Information** for the office or Work Station .	

Under **Location**, either type the name of the district where the office or Work Station is located, or click Select Value and select the Country, Region and District where the office or Work Station is located. Click **Confirm** and confirm that the data entered are correct. If they are not correct, click **Edit** to change it. If they are, click **Save** to save them. **NB:** *The fields with an asterisk sign (*) are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.*	
To update or change the data, Click **Update this Information** beside the Office/ Workstation to edit the information. To add more Office/Workstation then you can add one by one. After saving the information, Click on **Select Another Office/Facility** beside the information and then fill the information as directed above	

1.1.2 Add Positions (by Office/Work Station)

Adding a position creates a new position in the organization (LGA) that a single employee will fill. The position must be created before it can be assigned to an existing employee or applications can be accepted for the position. A position that is not linked to an employee but for which you intend to hire someone to fill it is called an *open position*. A position that is not linked to an employee and for which you are not intending to hire someone or the scheme of the position linked to the Designation has been abolished is called a *discontinued position*.

A position that is filled by an employee is called a *closed position*.

From the home page or left menu , click Configure System then click Administer Database . Under the "**Manage Positions**" section, select Positions (by Office/Work Station) and click it.	
The Position page opens. Click Add New Position.	

The Position form opens. Select the **Designation** for the new position. Enter the **Position Title** (this may be the same as the Designation title). Enter a **Position Description** as an addendum to the Designation description (this field is optional). Enter the **Proposed Salary** amount for the position; this amount will be changed to the actual salary when the position is filled (optional). If there are one or more salary sources to track for the position, select them in the **Source** box; to select more than one salary source, hold down the CTRL key while clicking the name of each salary source (optional). Today's date displays for the **Date Posted**, the date the position was opened. If this is incorrect, change the date. Enter any comments or notes about the position in the **Position Comments** box (optional). Enter the **Position Code**. Either type or select the code and title of the position that will supervise this position under **Supervisor** (optional). Select the office or Work Station where the position is located in the **Work Station** menu. Select the **Department** where the position is located (optional). Select the **Terms of Employment** (optional). Select the **Date of First Appointment** for the position (optional). If the position is short-term, select the **Proposed End Date** for the position (optional). Select the **Status** of the position: Open or Discontinued. Select *Open* if you want the position to be available for assignment to an employee. If an interview has been held for the position, enter any comments or notes about it in the **Interview Comments** box (optional). Click **Confirm** and confirm that the data entered are correct. If they are not correct, click **Edit** to change it. If they are, click **Save** to save them. **NB:** *The fields with an asterisk sign (*) are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.*	

To update or change the data, Click **Update this Information** beside the Position information to edit the information. To add more Position then After saving the information, Click on **Select Another Position** beside the information and then fill the information as directed above You can Discontinue the position Eg. If the Scheme or you don't want to hire someone with that position's title by Click on Discontinue this Position	

1.2 Planning Information (Creating Establishment/Staff Norms)

This module enables an organization to plan for staff norms and other related models. The organization (LGAs) can create a staff norm based on Office/Workstation, Office/Work Station Type, Designation or Cadres

You may have several different types of establishments or staffing norms at your organization. For example:

- Funded Positions (Eg. Those funded by Donors)
- Staffing Norms set by the Government (Eg. Community Development Officers for every District,Ward, Village etc
- Recommended positions and Cadre based on a master plan

The establishment module lets you track these establishments within the system. It has been categorized into three categories namely Establishment Type, Establishment Period and Establishments

1.2.1 Create an Establishment Type

An establishment type is simply a name you can use to refer to the establishment you wish to deal with, for example "Funded Positions."

To set an establishment type do the following steps. From the Home page or left menu; • Click on " Configure System" then • Click on "Administer Database." then • Under **"Planning Information"** Click on "Establishment Type	
• Click on Add New Establishment Type The Establishment type form open, Enter the **Name** for the Establishment Eg. *Staffing Norm* Click **Confirm** and confirm that the name entered is correct. If it is not correct, click **Edit** to change it. If it is, click **Save** to save it. **NB:** *The fields with an asterisk sign (*) are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.*	

1.2.2 Creating an Establishment Period

The establishment period is simply a year that a given establishment type is effective, for example "2011" for the the "Staffing Norm".

To set an establishment period do the following: From the home page or left menu; • Click on "Configure System" • Click on "Administer Database." • Under **"Planning Information"** Click on "Establishment Period"	

• The Establishment Period page opens; • Click on Add a new Establishment Period	

• The Establishment Period Form opens,
    • Select the **Establishment Type** as you wish. In the example above it would be "***Staffing Norm***"
    • Set the year of applicability as you wish. In the example above it would be "2011"
 	
Click **Confirm** and confirm that the data entered is correct. If it is not correct, click **Edit** to change it. If it is, click **Save** to save it.
 	
NB: *The fields with an asterisk sign (*) are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.*	

1.2.3 Creating the Establishments

Now that you have the establishment period set up, you can now set the specific establishments. For each establishment, you can specify either the Designation or cadre, and either the Office/Work Station or Office/Work Station type.

Now you can choose to set the establishment for the Eg. Designation *"Nurse I"* with the Office/Work Station type Health Centres, Dispensaries etc. If you need to, you can also set the number of "*Nurse I*" for one or more of the Health Centres.

To set an establishments do the following: From the home page or left menu; • Click on "Configure System" • Click on "Administer Database." • Under Planning Information Click on "Establishments"	
The Establishment page opens; Click on Add New Establishments	
The Establishment form opens, You will have to fill it completely Select the **Establishment Period** (*in the example it is Staffing Norm - 2011)*, Fill the **Office/Work Station or Office/Work Station Type** where the norm is aimed Select the **Designation or Cadre** needed for Establishment, Then write the number of workers required in **Establishment(Required Number of Workers)** *(The example on the right snapshot shows that during the year 2011 the number of Nurses with qualification as Nurse I needed at the Mlandizi Health Centre is 4)* ***NB:*** Refer to Run/ View Report under IKAMA report to see the it. Click **Confirm** and confirm that the data entered are correct. If they are not correct, click **Edit** to change it. If they are, click **Save** to save them. **NB:** *The fields with an asterisk sign (*) are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.*	

1.3 Competency (OPRAS) Informations

The Competency Model is a module that enables employers to assess employee's competencies in various skills. A *competency* is a skill performed to a specific standard under specific conditions. The *competency model* is the set of competencies that together define successful performance in that work environment. An employee's performance in various competencies can be assessed via observation, and employees can update skills through in-service training. (Typically, competencies are not assessed at the time of hiring.) The Competency Model will enable the employer to ensure that the person holding a particular job is qualified to do that job, but not overqualified and not doing work that someone else could be doing more effectively.

The competency is divided into three categories namely Competency Type, Competency and Competency Evaluation

1.3.1 Add a Competency Type

A *competency type* is a broad category for organizing competencies, or skills in which employees have been assessed as competent. Examples of competency types include Computer Skills, Client Interaction and Diagnostics. Competency types combined with competencies comprise your organization's competency model. Eg We want to asses the competency of our Employee in **Food Security** policy which is categorized into different parts according employee job description. Eg District Agriculture and Livestock Officer (DALDO) has to ensure that the Farmers get seeds and practices good agriculture practice.

From the home page or left menu, click Configure System the Click Administer Database In the **"Employee Lists"** section, Click Competency Type.	
The Competency Type page opens; The Competency Type page opens, showing all the Competency Types entered in the database. Either click Add New Competency Type or select an existing competency type and click Update This Information to edit it.	
The Competency Type form opens. Enter the **Name** of the competency type Eg. *Public Food Security* Click **Confirm** and confirm that the data entered are correct. If they are not correct, click **Edit** to change it. If they are, click **Save** to save them. **NB:** *The fields with an asterisk sign (*) are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.*	

1.3.2 Adding a Competency

After adding a competency type, add one or more *competencies*--skills or qualifications in which an employee has been assessed as competent--grouped under that competency type. For example, for the competency type Public Food Security, specific competencies could include Pest Control, Land salinity control, fertilizers. The set of competencies and competency types comprise your organization's competency model. When an employee has been assessed as having a particular competency, that competency can be added to the employee's record. Competencies may also be earned by completing training courses.

From the home page or left menu, Click Configure System and then Click Administer Database In the **"Employee Lists"** section, Select/Click Competency.	

The Competency page opens. Click Add New Competency If you want to edit an existing competency, select its competency type and click the View button to display all matching competencies; then click the competency name and click Update This Information to edit it.	
Enter the **Name** of the event where an employee's performance is going to be assessed. Select the **Competency Type** from the list of the Master Plan where an organization (LGA) has aimed at attaining at particular time. Write short **Notes** of the expected tasks tendered to the person in charge. Click **Confirm** and confirm that the data entered are correct. If they are not correct, click **Edit** to change it. If they are, click **Save** to save them. **NB:** *The fields with an asterisk sign (*) are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.*	

1.3.3 Adding Competency Evaluation

If you want to assess an employee in a particular competency(How he/she has performed on the responsibility laid to him/her) , each evaluation option must be added for selection when making the assessment. For example, you might enter "Competent," "Not Competent" and "Not Assessed" as options to select for the evaluation.

From the home page or left menu, Click Configure System and then Click Administer Database In the **"Employee Lists"** section, Select/Click Competency Evaluation.	
The Competency Evaluation page opens, showing all the Competency Evaluations entered in the database. Either click Add New Competency Evaluation or Select an existing competency evaluation and, Click Update This Information to edit it.	
Entering new Competency Evaluation Click Add new Competency Evaluation The Competency Evaluation form opens. Enter the **Name** of the competency evaluation. Click **Confirm** and confirm that the name entered is correct. If it is not correct, click **Edit** to change it. If it is, click **Save** to save it. **NB:** *The fields with an asterisk sign (*) are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.*	

1.4 In-service Training Course Information

A *training course* is a course that an employee may take to gain new competencies and skills or continuing education credits. Eg. The outbreak of Bird Flu fever may prompt the Ministry of Health to schedule a short-term training course for her employee on how to dealt with the outbreak and provide carefully service to those suffered from the outbreak. Also there might be different courses for Employee to participate which are already put on the time table and thus an organization can schedule her employees to attend those course periodically and on rotation basis. Eg HR personnel training at Hombolo.

1.4.1 Add a Training Course

A training course covers only one topic, but it may have multiple classes that are available for employees to attend. Either the Training Manager or the HR Manager can add a training course.

From the home page or left menu, Click Configure System and then Click Administer Database In the **"Training Course Information"** section, Click/Select Training Courses.	
Then the Training Course page opens, Click on Add new Training Course to open the form and fill the training course information	
The Training Course Form opens and thus you need to fill the information, Enter the **Name** of the training course. Select the **Category** of the training course. Enter the **Topic** of the course. Select the name of the **Training Institution** giving the course. Enter the **Passing Score For Final Exam** (optional) Select the training course **Status**. Enter any **Notes** about the course. Select the names of the **Training Funders;** hold down the CTRL key and click to select more than one. Select any **Competencies** gained by completing the course; hold down the CTRL key and click to select more than one. Click **Confirm** and confirm that the information entered is correct. If it is not correct, click **Edit** to change it. If it is, click **Save** to save it. **NB:** *The fields with an asterisk sign (*) are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.* After saving the course information, the screen for entering the class schedule will appear (see Schedule a Course next) below.	

1.4.2 Schedule a Training Course

After adding a training course, you need to schedule at least one class for that course. The class information includes the dates of the class and the location where the class is given. When an employee is scheduled to take a training course, that employee is assigned to one of these classes . A training course can have several classes Eg. 5 different class for HR personnel to participate training at Hombolo depending on their number and the level of activities to avoid emptying the HR department at one time .

There are two alternatives in entering the **"Schedule a Training Course"** Information One After saving the course information, the screen for entering the class schedule will appear thus click on Schedule a Course OR From the home page or left menu, Click Configure System and then Click Administer Database In the **"Training Course Information"** section, Click/Select Scheduled Training Courses.	
The Schedule training Course form appears; From the drop-down menu, select the training course to schedule and click the View button or Click the Add new Scheduled Training Course to add new schedule information to a training course	
The form opens and you need to fill the information as guided; Select the **Training Course** you want to schedule from a drop-down list of variety course. Enter the **Maximum Number of Students** who can attend the class. Select the **Start Date** and **End Date** for the class (today's date is entered for both by default thus you have to pick the correct one if today is not) Enter any **Notes** about the class. Enter the class's **Site**, or the location where the class is taking place. Enter the name(s) of the class's **Instructors**, if known. Select the **Country**, **District** and **County** where the class is located (optional). Click **Confirm** and confirm that the information entered is correct. If it is not correct, click **Edit** to change it. If it is, click **Save** to save it. **NB:** *The fields with an asterisk sign (*) are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.*	
After saving the Schedule information then the information will display below the Corresponding training course. Also you can see the names of students (Below) who has been picked to attend the course. To edit the Information Click Update this Information beside the information to edit and change it. If you want to continue add new other information Click on Select Another Course and enter the information concerning the new course.	

1.4.3 Add Status of a Training Course

The training course *status* classifies whether the course is open, closed or any other status of your choosing. At least one status should be added.

From the home page or left menu, Click <u>Configure System</u> and then Click <u>Administer Database</u> In the **"Training Course Information"** section, Click/Select <u>Status of a Training Course</u>.	
The Training Course Status page opens; Either Click <u>Add New Training Course Status</u> to add new status or select/click an existing status to edit.	
The training course status form opens; Enter the **Name** of the status. Click **<u>Confirm</u>** and confirm that the information entered is correct. If it is not correct, click **<u>Edit</u>** to change it. If it is, click **<u>Save</u>** to save it. **NB:** *The field(s) with an asterisk sign (*) are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.*	

1.4.4 Add Requestors of Training Course

The training course *requestors* are any person or group who requests that an employee attend a training course. Examples of requestors include the employee, the employee's supervisor, the human resources department or a donor organization.

From the home page or left menu, Click <u>Configure System</u> and then Click <u>Administer Database</u> In the **"Training Course Information"** section, Click/Select <u>Requestors of a Training Course</u>.	
The Training Requestors page opens Click <u>Add new Training Requestor</u> to open the form in order to fill the information	
The Training Requestor Form opens; Enter the **Name** of the Training Requestors, Click **<u>Confirm</u>** and confirm that the information entered is correct. If it is not correct, click **<u>Edit</u>** to change it. If it is, click **<u>Save</u>** to save it. NB: *The field(s) with an asterisk sign (*) are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.* If there are more than one requestors then you can add one by one after saving the information click on *Select Another Training Requestor* and then filling the information as directed above	

1.4.5 Add an Evaluation of a Training Course

The training course *evaluation* is used to evaluate an employee's performance in a training course. Examples of evaluations include Pass, Fail, In progress and Incomplete. At least one evaluation option should be added

From the home page or left menu, Click Configure System and then Click Administer Database In the **"Training Course Information"** section, Click/Select Evaluation of a Training Course.	
The Training Course Evaluation page opens; Either Click Add New Training Course Evaluation to add new evaluation or select/click an existing evaluation to edit.	
The training course status form opens; Enter the **Name** of the evaluation. Select the **Competency Evaluation.** Click **Confirm** and confirm that the information entered is correct. If it is not correct, click **Edit** to change it. If it is, click **Save** to save it. **NB:** *The field(s) with an asterisk sign (*) are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.*	

1.4.6 Add a Category of a Training Course

Training course *categories* group similar courses. The category is generally more broad than the training course topic. Eg. Project Financial Control, Time Management, Human Resource Management etc both fall under Management Category

From the home page or left menu, Click Configure System and then Click Administer Database In the **"Training Course Information"** section, Click/Select Category of a Training Course.	
The Training Course Category opens; Either Click Add New Training Course Category to add new category or select/click an existing category to edit.	
The Training Course Category form opens; Enter the **Name** of the evaluation. Click Confirm and confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it. **NB:** *The field(s) with an asterisk sign (*) are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.*	

1.4.7 Add a Training Institution

Training institutions are organizations that give courses. Eg Professional Institution etc Using training institutions is optional.

From the home page or left menu, Click Configure System and then Click Administer Database In the **"Training Course Information"** section, Click/Select Training Institution	
The Training Institution page opens; Either Click Add New Training Institution or select an existing training institution and Click it to edit , then click Update This Information and apply your changes.	
Clicking the Add new Training Institution the opens form; Enter the **Name** of the training institution. Select the **Location** *(Country, District and County)* where the training institution is located. Enter the **Contact Information** known for the training institution. Click Confirm and confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it. **NB:** *The field(s) with an asterisk sign (*) are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.* If there is more than one training institution then you can add then one after another each time you finishes to save the information Click on *Select Another Training Institution* and continue to add other training institution.	

1.4.8 Add a Training Funder

Training funders are organizations that fund employees to take training courses. Using training funders is optional.

From the home page or left menu, Click Configure System and then Click Administer Database In the **"Training Course Information"** section, Click/Select Training Funder	
The Training Funder page opens; Click Add New Training Funder	

The Training Funder Form opens; Enter the **Name** of the training institution. Select the **Location** *(Country, District and County)* where the training institution is located. Enter the **Contact Information** known for the training institution. Click Confirm and confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it. **NB:** *The field(s) with an asterisk sign (*) are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.* If there is more than one training institution then you can add then one after another each time you finishes to save the information Click on *Select Another Training Funder* and continue to add other training funders.	

1.4.9 Add a Continuing Education Course (CEU)

Continuing education courses provide official continuing education units (CEUs) for employees, which may be needed to renew a license or obtain professional registration. A training course can be associated with more than one continuing education course. Using CEUs is optional

From the home page or left menu, Click Configure System and then Click Administer Database In the **"Training Course Information"** section, Click/Select Continuing Education Course	
The Continuing Training Course page opens; Click Add New Continuing Training Course	
The Continuing Education Course Form opens; Enter the **Name** of the continuing education course. Enter the number of **Credit Hours** earned by completing the course. Click Confirm and confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it. **NB:** *The field(s) with an asterisk sign (*) are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.* If there is more than one training institution then you can add them one after another each time you finishes to save the information Click on *Select Another Training Funder* and continue to add other training funders.	

Important Note:

During entering of Training Information you may face difficulties in completing some information since they may yet not been entered thus you will need to enter them first before you continue Eg. If you start with ***Add a new Training Course,*** you will have first to enter the *Training Category, Training Funder, Training Institution etc* before you can complete a Training Course

1.5 Other Standard List

There are other Standard List which must be entered first, after being entered they will be used as standard to all employees wherever needed to fill information of their Kind. Examples of this Standard are

- Leave Type – A standard list to be used to record when an employee is out of office for official permission
- Accident Type - Means to capture any emergencies and tragedies during work-hour
- Disciplinary Action Type – What measures are taken when an employees commits mistakes and blunder
- Disciplinary Action Reason – Why the action is taken to an employee who has misbehave.

1.5.1 Leave Type

This aims to capture those official permission for an employee to be out of office. Leaves

From the home page or left menu, Click Configure System and then Click Administer Database In the **"Employee Lists"** section, Click/Select Leave Type	
The Leave Type page opens; Click Add New Leave Type	
Enter the **Name** of the Leave Type. Click Confirm and confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it. **NB:** *The field(s) with an asterisk sign (*) are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.*	
To update the Leave Type Information after saving it then Click Update this Information beside the Leave type. If there is more than one Leave Type then you can add them one after another each time you finishes to save the information Click on *Select Another Leave Type* and continue to add other Leave Type information.	

NB: Follow the steps by clicking the corresponding information to add information for Discipline Action Type, Discipline Action Reason, Accident Type etc

Part II: Employees Records

Managing Employee Records

This part will show how the user within the HR Personnel Department i.e HR Staffs can Add new Employee into the system and subsequently how the HR Staffs record any updates or changes to an employee's information when they occur, including changes in position or salary, termination of employment and a log of notes about the employee. HR Staff, the HR Manager or Executive Managers may review history of name changes, position changes, salary changes and notes at any time.

2.0 Manage People/Add People

The Employee Information to be entered into the system starts here. The Manage People Function enable HR Staff to manual enter the employee information. In order to do so then, Certain information is required to start a new record. Once the record is generated, additional options for adding data about the person will become available.

The Following are Employee Information which will be entered into the system

On the Home page or in left side menu , • Click Manage People.	
On the right side (*in red)* menu or in the left side menu • Click Add Person.	
The Add Person form opens. Enter the person's **Surname**, **First Name** and any **Other Names** in the appropriate fields. Select the **Highest Education Level** from the drop down menu. Select the person's **Nationality** from the menu. Select person's seniority status under **Seniority Status** *(optional) (Reserved only for those with specific duties e.g DED, Principal Officers, Senior Officers etc)* Type or select the name of the person's district. Under the **Place of Domicile** Click **Confirm** and confirm that the data entered are correct. If they are not correct, click **Edit** to change it. If they are, click **Save** to save them.	

After Saving the Information, the person's new record opens with options to add additional information divided into sections. Also the System divides itself into two menu. The left side menu helps the user to jump quickly to the information he/she want to use or add. It acts as a Shortcut. Eg. To go directly to Position Information you just click *Position Information* on the left side menu. Otherwise you can scroll downward to your desired destination.

The information are divided into sections. The sections also contain sub section in flat bar separated by **|** and appear in *pale brown color* and turns *blue* upon cursor movement on it.

Eg. The Snapshot above shows the **Sub Section** under Individual Section which are

Set Position| *Add Demographic Information*| *Add Passport Photo*| *Add Resume* | *Add Identification* |*Add Employment Identification*| *Standardized Letters.*

Some information will be required to be entered during the Data entry process while the other will be entered regularly based on the operational.

The Following are section which contain sub section used to enter employee information

- **Individual Information**
- **Contacts Information**
- **Dependents Informations**
- **Next of Kin Informations**
- **Position Informations**
- **Confirmation Informations**
- **Qualifications**
- Training Courses
- Current Disciplinary Actions
- Workplace Accidents
- Applications
- **Employment History**
- **Education History**
- Notes
- Leave Information
- Record Status
- Scanned Paper Records

Note:

- ✓ The Bold Sections are also involved during the data entry process and can be used to edit and changes employee's information at any time
- ✓ The un-bold Sections will be used during the daily activities by HR Staffs while assessing and general management.

2.0.1 Individual Information Section

This section contain the following sub-section *Set Position*| *Add Demographic Information*| *Add Passport Photo*| *Add Resume* | *Add Identification* |*Add Employment Identification*| *Standardized Letters.*

Set Position

Immediately after an employee has been added to the system, the employee's record displays. The next step is to set the position that the employee will fill. Until the position has been set, the employee will not appear in any current employee lists. The employee's position must have been created in the system and have been designated as open (the position is not filled by another employee or discontinued).

If an employee leaves a position and is not assigned a new one, that employee is considered an "old employee" who has left the organization. However, the employee may return to work in a new position. In that case, also follow these steps to set a position for the old employee.

From the employee's record, Under the **"Individual Information" section.** • Click Set Position	
The Assign Position form opens. Under **Position**, either type the position code or select the office work station and pick the title of the open position that the employee will fill. The **Start Date,** the date that the employee started work in that position, is set to today's date by default. Select a new date from the menu if the start date is different. Under **Salary**, select the currency that the employee is paid in and enter the salary that the employee is paid. Click **Confirm** and confirm that the information entered is correct. If it is not correct, click **Edit** to change it. If it is, click **Save** to save it. The new position information will appear in the employee's record in the **"Position Information"** section. To see it Scroll down to **"Position Information"** or on the left menu side Click **"Position Information"** and then Click the position title *(see the cursor)* to view information about that position.	

Add Demographic Information

Add demographic information about the employee for reporting purposes. Demographic information includes date of birth, gender, marital status and number of dependents.

In the person's record under the **"Individual Information"** section, click Add Demographic Information.	

The Demographic Information form opens.

Set the employee's **Date of Birth** by clicking and picking the data using the date picker (Calendar Bar pop up) that will appear *(it follow the **Year/Month/Date**)* order.

Select the employee's **Gender**.

Enter Employee's **Religion**

Enter Employee's **Disability** if he/has any. (Option Leave if the employee don't have any disability)

Enter Employee's **Tribe**

Select the employee's **Marital Status**.

Enter the **Number of Dependents** for the employee *(Numeric 1-4)*.

Click **Confirm** and confirm that the information entered is correct. If it is not correct, click **Edit** to change it. If it is, click **Save** to save it.

The information you've filled will appear under the Demographic Information

Add Passport Photo

Your organization(LGA) may require employees to submit a current passport photo. Make a folder where you store the photo of employee before you upload a passport photo to the person's record.

In the person's record under the **"Individual Information"** section, click Add Passport Photo.

The Add/Update Passport Photo form opens.

Under **Image**, click **Browse** to find the image you want to upload from the folder you've stored them and click open to upload it.

Enter the **Date** using the date picker. Add a **Description** of the passport photo.

Click **Confirm** and then **Save** to save the passport photo in the person's record.

The passport photo that you just uploaded displays in the employee's record.

To update a passport photo, click Update this Information and add the new photo.

Add Resume

You can also upload a resume (Curriculum Vitae (CV)) to the person's record. You can create a folder on your computer in order to store employee's CV's to make easier during picking them to upload

In the person's record under the "**Individual Information"** section, click Add Resume.

The Add/Update Resume form opens.

Under **Document**, click Browse to find the document you want to upload from the folder you've stored them.

Enter the **Date** using the date picker. Add a **Description** if necessary.

Click **Confirm** and then Click **Save** to save the resume in the person's record.

The resume that you just uploaded displays in the employee's record. To update a resume, click Update this Information and add the new document.	

Add Identifications

Your organization may require one or more identifications from employees and job applicants. Add this identification information to the person's record. Multiple identifications may be added for a single person.

In the person's record under the **"Individual Information"** section, click Add Identification.	
The Add/Update Identification form opens. Select the **Identification Type**. Enter the number or other identifier for the identification in the **Identification Number** box. Click **Confirm** and confirm that the information entered is correct. If it is not correct, click **Edit** to change it. If it is, click **Save** to save it.	
The identification information that you just entered displays in the employee's record. The ***Add Identification*** field allow additional identifications be added and stored. To do that you repeatedly follow the above steps For each identification, click Add Identification and add the new identification. If any of the identification information needs to be changed, click Update This information beside the incorrect identification to edit it. Eg. After Passport No, You can repeat the procedure for TIN number etc	

Add Employment Identification

This has been designed to meet the need of the PMO-RALG and it involves the TSD Number for teachers, Check Number and the Person File Number (PF No). Unlike the Identifications this is easy since it is filled only once

In the person's record under the "**Individual Information"** section, click Add Employment Identification.	
The Add/Update Employment Identification form opens. Enter the **Check Number** of an Employee. Enter the **PF. Number** Enter the **TSD. Number** (*for teachers)* Click **Confirm** and confirm that the information entered is correct. If it is not correct, click **Edit** to change it. If it is, click **Save** to save it.	
The Employment Identification information that you just entered displays in the employee's record. If any of the identification information needs to be changed, click Update This information beside the incorrect identification to edit it.	

2.0.2 Contacts Informations Section

For each person in the system, four types of contact information may be added: This section has four sub-section namely

Add Work Contact **|** ***Add Other Contact*** **|** ***Add Emergency contact*** **|** ***Add Personal Contact***

Only one contact may be added for each type. Contact information may be added at any time after the record is created. All contact fields are optional.

Add Personal/Work/Emergency/Other Contact The contact information can be added only once for each type i.e You can add Personal Contact only once etc	
In the employee's record, click **Contact Information** in the side menu to jump to the **"Contact Information"** section of the record or Scroll down to the **"Contact Information"** section. Click the link for the type of contact information you want to add. Eg: Add Personal Contact	
The Add/Update Contact Information form opens. Enter the full **Mailing Address**. Enter a primary **Telephone Number**. Enter an **Alternate Telephone Number**, such as a mobile phone. Enter a **Fax Number**. Enter an **Email Address**. Enter any **Notes**, such as the name of an emergency contact. Click **Confirm** and confirm that the information entered is correct. If it is not correct, click **Edit** to change it. If it is, click **Save** to save it.	
The contact information that you just entered displays in the employee's record. Repeat these steps for each type of contact to add for the person. If any of the information needs to be changed, click Update This information beside the incorrect contact information to edit it *(see the cursor)*.	

2.0.3 Dependents Information Section

You can utilize the Dependents Module to track information on employees' dependents. It has one subsection

Add Dependent

Add Dependents	
In the employee's record, click **Dependents Information** in the side menu to jump to the **"Dependents Information"** section of the record or Scroll down to the **"Dependents Information"** section. Click Add Dependent	
The Add/Update Dependent Information form opens. Enter the dependent's **Name**. Select the **Gender** and **Date of Birth** from the date picker. Click **Confirm** and confirm that the information entered is correct. If it is not correct, click **Edit** to change it. If it is, click **Save** to save it.	

The dependent information that you just entered displays in the employee's record. Additional dependents can now be added. For each dependent, Click Add Dependent and add the new dependent's information repeatedly *(The maximum number is 4 dependents as per PMO-RALG).* If any of the dependent's information needs to be changed, click Update This information beside the incorrect information to edit it.	

2.0.4 Next of Kin Informations Section

You can also record the information of employee's closest persons (next of kin) in case of any emergency to contact them. This section also has one subsection.

Add Next of Kin

Add Next of Kin This captures the information of a closest person to an employee aimed when emergency occurs.	
In the employee's record, click **Next of Kin Information** in the side menu to jump to the **"Next of Kin Information"** section of the record or Scroll down to the **"Next of Kin Information "** section. Click Add Next of Kin	
The Add/Update Dependent Information form opens. Enter the Next of Kin's **Name**. (required field) Enter Next of Kin's **Relationship** with the Employee. (required field) Enter **Telephone Number** , **Alternative Telephone Number, Email Address, Mailing Address, Fax Number, and Notes** (Optional) Click **Confirm** and confirm that the information entered is correct. If it is not correct, click **Edit** to change it. If it is, click **Save** to save it.	
The Next of Kin information that you just entered displays in the employee's record. Additional Next of Kin can now be added. For each Next of Kin, Click Add Next of Kin and add the new Next of Kin's information repeatedly *(The maximum number is 2 next of kins as per PMO-RALG).* If any of the Next of Kin's information needs to be changed, click Update This information beside the incorrect information to edit it.	

2.0.5 Position Information Section

This captures other employee's information which includes the Contribution to Pension funds, Duty Post Information and Last Promotion Information. It has three sub-section

Add Benefit/Special Payment |Set Duty Post |Record Last Promotion|

Add Benefit/Special Payment This captures the information on Pension funds and other contribution and employee is oblighted to	
In the employee's record, Click Position Information in the side menu to jump to the **"Position Information"** section or use the arrow to scroll down to **Position Information** section. Click Add Benefit/Special Payment.	
The Add/Update Benefits form opens. Select the **Benefit Type**. Select the **Source** of the payment. Enter the **Amount**. Select the **Start Date** of the payment. (First Appointment) Select the **End Date** of the payment. (Retirement Date) Select the **Recurrence Frequency** of the payment: once, weekly, monthly or yearly. If the frequency is set to "once," the start date and end date should be the same or the end date may not be entered. Click **Confirm** and confirm that the information entered is correct. If it is not correct, click **Edit** to change it. If it is, click **Save** to save it.	
The information that you just entered displays in the employee's record under the "**Position Information**" section. Additional benefits or special payments can now be added. For each new benefit, Click Add Add Benefit/Special Payment and follow these same steps. If any of the benefits information needs to be changed, Click Update This information beside the incorrect benefit to edit it.	
Set Duty Post This part is designated to capture information of an employee's Duty post apart from the professional jobs he/she has E.g Head of Department, DHRO, Head teacher etc.	
In the employee's record, Click Position Information in the side menu to jump to the **"Position Information"** section or use the arrow to scroll down to **Position Information** section. Click Set Duty Post	
The Add/Update Duty Post Form open Enter the Duty Post in **Duty Post** field for an Employee. Enter a code in the **Code** field if the post has it. Pick the date of attaining the post by using the date picker at the **Date of Assignment to Post** Upload the letter by clicking the **Browser** button. Click **Confirm** and confirm that the information entered is correct. If it is not correct, click **Edit** to change it. If it is, click **Save** to save it.	

The information that you just entered displays in the employee's record under the "**Position Information**" section. Additional Duty Posts can now be added. For each new benefit, Click Set Duty Post and follow these same steps. If any of the Duty Posts information needs to be changed, Click Update This information beside the incorrect Duty Post to edit it.	

Record Last Promotion The Latest Promotion information of an employee can also be captures. The information needed is the Date of Promotion and the Letter to aide the claim.	
In the employee's record, Click Position Information in the side menu to jump to the "**Position Information"** section or use the arrow to scroll down to **Position Information** section. Click Record Last Promotion	
The Add/Update Last Promotion form Open Select the employee's promotion title in **Promoted to: (Title)** field Pick the **Date of Promotion** Enter the **Title Code** (Option) Upload the **Letter of Promotion** by clicking the ***Browser*** Button Click **Confirm** and confirm that the information entered is correct. If it is not correct, click **Edit** to change it. If it is, click **Save** to save it.	
The information that you just entered displays in the employee's record under the "**Position Information**" section. Additional Promotion Information can now be added. For each new last promotion information , Click Record Last Promotion and follow these same steps. If any of the Last Promotion Information needs to be changed, Click Update This information beside the incorrect Record Last Promotion to edit it.	

2.0.6 Confirmation Information Section

The date of confirmation into service and the letter of confirmation is captures here. It has one sub-section

Record Date of Confirmation into Service

Record Date of Confirmation into Service	
In the employee's record, Click Confirmation Information in the side menu to jump to the "**Confirmation Information"** section or use the arrow to scroll down to **Confirmation Information** section. Click Record Date of Confirmation into Service	

The Add/Update Date of Confirmation into Service opens, Pick the **Date of Confirmation into Service** of an Employee Upload the **Letter of Confirmation into Service** by Clicking the **Browser** Button. Click **Confirm** and confirm that the information entered is correct. If it is not correct, click **Edit** to change it. If it is, click **Save** to save it.	
The information that you just entered displays in the employee's record under the "**Confirmation Information**" section If any of the Date of Confirmation into Service Information needs to be changed, Click Update This information beside the incorrect Date of Confirmation into Service.	

2.0.7 Qualifications Information Section

Some Public employee are required to be registered or licensing by a professional licensing board or registration council in order to carry out their activities. Thus this section captures those information and others. It has four sub-section

Add Registration | Add Language Proficiency | Add Competency | Competency Evaluation

Add Registration Many health workers are required to be registered or licensing by a professional licensing board or registration council and so for other workers like Engineers, Accountants, Technicians etc. Track your employees' registrations or licenses by adding a registration to employees' records.	
In the employee's record, Click Qualifications in the side left menu to jump to the **Qualification** section or use the arrow to scroll down to **Qualification** section. Click Add Registration.	
The Add/Update Registration form opens, Pick the **Registration Board/Council** for an Employee Enter the **Registration Number** Pick the **Registration Date** Enter the License **Number** Enter the **License Expiration Date** by using the Date Picker Click Confirm and confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it.	
The information that you just entered displays in the employee's record under the **Qualifications** section. Additional **Registration Information** can now be added. For each new Registration information , Click Add Registration and follow these same steps. If any of the Registration Information needs to be changed, Click Update This information beside the incorrect Registration to edit it.	
Add Language Proficiency Information To track employees' foreign language skills, add language proficiencies to a person's record. Proficiency level in speaking, reading and writing each language can be recorded separately.	
In the person's record, click Qualifications in the side menu to jump to the "Qualifications" section of the record. Click Add Language Proficiency.	

The Language form opens. Select the **Language** to add. Select the person's **Speaking Proficiency** in that language: Elementary, Limited Working, Professional Working, Full Professional or Fluent. Select the person's **Reading Proficiency** in that language. Select the person's **Writing Proficiency** in that language. Click Confirm and confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it.	
The language information appears on the person's record under the "**Qualifications**" section. Repeat these steps for each language in which the person is proficient. If any of the language information needs to be changed, click Update This information beside the language proficiency to edit it.	

Add Competency

To track employees' *competencies*--specific skills that may qualify that person for a particular job--add competencies to a person's record. Each competency is grouped under a broad category, or competency type. An employee's competencies can be evaluated, and evaluations can be updated and tracked in the employee's evaluation history.

In the person's record, click Qualifications in the left side menu to jump to the "**Qualifications**" section of the record or scroll down to the **Qualification** section. Click Add Competency.	
The Competency form opens. Under **Competency** select or type the competency type and then the competency to add. If the employee has been evaluated for the competency, select the **Evaluation** result (optional). Select the date the person was **Last Evaluated** (optional). Click Confirm and confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it.	
The competency appears on the person's record under the **"Qualifications"** section. Repeat these steps for each competency that the person has. Update an evaluation by clicking Update This Information beside the competency's name.	
After adding the competency, you can review the evaluation history of a single competency by clicking View Evaluation History beside the competency's name, or view all competency evaluations for the employee by Clicking Competency Evaluations at the top of the **"Qualifications"** section.	

2.0.8 Training Courses Section

If an employee is going to take a training course, or the employee has completed a course and needs to be evaluated, schedule the training course for the employee. The Training Manager, as well as HR Staff, can schedule training courses. This section has one subsection

Add Training

Add Training	
In the employee's record, Click <u>Training Courses</u> in the side left menu to jump to the **Training Courses** section or use the arrow to scroll down to **Training Courses** section. Click <u>Add Training</u>	
The Schedule a Person for a Training Course opens; Under **Instance**, click <u>Select Value</u> and use the drop down menu to select the training course and date you would like to schedule. Enter the **Request Date** the date the employee was requested to attend the course (today's date is entered by default) and enter the **Date of Return To Work**, Under **Requested By**, select the person or group who requested that the employee take the training course. Enter any **Notes** about the course request or scheduling. Select whether the course is a **Retraining** for the employee. Select whether the employee has **Completed** the course. Select the **Evaluation** result. Click <u>Confirm</u> and confirm that the information entered is correct. If it is not correct, click <u>Edit</u> to change it. If it is, click <u>Save</u> to save it. **NB:** *The field(s) with an asterisk sign **(*)** are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.*	
After saving the information will appear below **'Training Courses'** section If you want to update/edit the information click *<u>Correct this Information</u>* Click <u>Course Competency Evaluation</u> if you want to add evaluation on the progress and report of the training an employee has attended Click <u>Record An Exam Result</u> beside the information if you want to record the grades or marks an employee has scored while attending the training.	
After Clicking the <u>Course Competency Evaluation</u> the Evaluate a Person's Competencies for a Training Course opens; Fill the **Evaluation** and record the **Last Evaluation date.** Click <u>Confirm</u> and confirm that the information entered is correct. If it is not correct, click <u>Edit</u> to change it. If it is, click <u>Save</u> to save it.	
After Clicking the <u>Record and Exam Result</u> beside the data the Exam Results For Training Course form opens; Choose the **Exam Type** you want to record the results, Enter the **Evaluation Date,** Enter any **Notes** Click <u>Confirm</u> and confirm that the information entered is correct. If it is not correct, click <u>Edit</u> to change it. If it is, click <u>Save</u> to save it. **NB:** *The field(s) with an asterisk sign **(*)** are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.*	

2.0.9 Disciplinary Action Section

This section records disciplinary action which may be taken against an employee. The module also support the Attachment of a letter which will be written to an employee when he has been taken discipline actions. This section has two subsection which are

New Action | History

Add New Disciplinary Action	
In the employee's record, Click Disciplinary Actions in the side left menu to jump to the **Current Disciplinary Actions** section or use the arrow to scroll down to **Current Disciplinary Actions** section. Click New Action	
The Add/Update Disciplinary Action Form opens; Select the **Action Taken** from among the listed action which is applicable in your organization rules. Select/Choose the **Reason for Action** Enter the dates for **Applicability of the Action** and **Date of Discussion.** Enter the **People Present** if there are many then enter one by one by clicking enter after completing one. Enter any **Notes** Click Confirm and confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it. **NB:** *The field(s) with an asterisk sign* ***(*)*** *are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.*	
After saving the information you can track them either to edit or view history, Click History, The Disciplinary Action History view page opens; Click on Correct this Information beside the Action you want to edit to edit it.	

Important Note:

Some Information has to be entered first as standard list so that they can be used when entering the employee information. *Eg. Action Taken and Reason for action*

2.0.10 Workplace Accidents Section

This section provides an option for employer to record those accidents which may occur to employee while performing their daily responsibility . This section has two subsection

Report Accident | History

Report Accident	
In the employee's record, Click Workplace Accidents in the side left menu to jump to the **Workplace Accidents** section or use the arrow to scroll down to **Workplace Accidents** section. Click Report Accident	

The Add/Update Workplace Accident Form opens; Select the **Accident Type** from among the listed action which is applicable in your organization rules. Enter the dates for **Applicability of the Action** and **Date of Occurrence.** Enter the **People Involved** if there are many then enter one by one by clicking enter after completing one. Enter any notes if **Foll-up Required** Click Confirm and confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it. **NB:** *The field(s) with an asterisk sign* ***(*)*** *are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.*	
After saving the information you can track them either to edit or view history, Click History under the **Workplace Accidents** section, The Accident History view page opens; Click on Correct this Information beside the Accident you want to edit to edit it.	

2.0.11 Applications Section

A job application can be added for any person in the system. Adding a job application puts the person in consideration for any open position. Records with a completed job application that do not already have a set position are considered "applicants" rather than employees of the organization. Employees with a set position can also have a job application on file for open positions, to manage internal hiring efforts. Until the applicant has applied for an open position, the applicant will not appear in any applicant lists. The applicant may only apply for positions that have been created in the system and have been designated as open (the position is not filled by another employee or discontinued).

If your organization does not need to track job applications, the Application module can be disabled by the System Administrator

This section has three sub-section

Add Application | *Log Interview Details* | *Log Appointment Decision*

Add Application	
In the person's record, click Application in the left menu to jump to the **"Application"** section of the record or scroll downwards. Click Add Application.	
The Application form opens. Under **Position(s)**, select the open position that the applicant is applying for; select more than one position by holding down the CTRL key while clicking each position. Complete as many of the other **Applicant Questions** as are applicable. Click Confirm and confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it. **NB:** *The field(s) with an asterisk sign* ***(*)*** *are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.*	

The completed application displays in the person's record. Now managers and HR personnel can review the application, make notes about the interview process and hiring decision, and make a job offer to the applicant.

The application will remain on file even after the position is filled, but it can be updated at any time by clicking Update This Information.

Log Interviews Details

In the person's record, click Application in the left menu to jump to the "Application" section of the record or scroll downward.

Click Log Interview Details.

The Add/Update Position Interview form opens.

The **Date of Interview** is set to today's date by default. If this is incorrect, change it.

Enter the names or titles of **People Conducting Interview**.

Enter any **Comments** about the interview (optional).

Upload an **Interview Record** if there is any (option)

Click Confirm and confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it. **NB:** *The field(s) with an asterisk sign* ***(*)*** *are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.*

The details of each interview are displayed in the person's record under the "Application" section and can be reviewed at any time.

Update these details by clicking Update This Information. Repeat the process for each additional interview.

Log Appointment Decision

In the person's record, click Application in the left menu to jump to the **"Application"** section of the record or scroll downwards .

Click Log Appointment Decision.

The Position Decision form opens.

The **Date of Decision** is set to today's date by default. If this is incorrect, change it.

Under **Assign a Position?** select Yes or No. (*This will not set the new position. That needs to be done in a separate) step*

Enter any **Comments** about the decision (optional).

Click Confirm and confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it. **NB:** *The field(s) with an asterisk sign* ***(*)*** *are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.*

The hiring decision details are displayed in the person's record under the **"Application"** section and can be reviewed at any time.

Update these details by clicking

Update This Information.

All of the Application Information can be viewed below the **Application** section. Note this Information are option as if your organization does not need this then the module can be disabled.	

2.0.12 Employment History Section

As part of completing the job application, the applicant's employment history should be recorded. The employment history can also be added to the record of any employee of the organization. The employment history captures information of organization where the employee has worked before. This section has one sub-section

Add Employment

Add Employment History	
In the person's/employee's record, Click Employment History in the left side menu to jump to the **"Employment History"** section or scroll down. Click Add Employment.	

The Add/Update Employment History In the "Company Information" section, enter the **Company Name** where the person previously worked. Enter the **Company Address** (optional). Enter the **Company Telephone** (optional). Enter the name of the applicant's **Supervisor** (optional). Under **OK to Contact?** select Yes or No for whether it is OK to contact the applicant's former employer. Enter the **Reason for Leaving** the former employer (optional). In the "Position Information" section, enter the **Date Started** at that employer. Select the **Currency** for and enter the amount of the **Starting Wage** (optional). Enter the title of the **Starting Position** (optional). Enter the **Date Ended**; leave this field blank of the applicant is presently employed by the company. Select the **Currency** for and enter the amount of the **Ending Wage** (optional). Enter the title of the **Ending Position** at the company (optional). Enter the **Job Responsibilities** (optional). Click Confirm and confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it. **NB:** *The field(s) with an asterisk sign* ***(*)*** *are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.*	
The past employment displays in the person's record under the **"Employment History"** section. Click Update This Information beside the employer to edit any of the fields, if necessary. Repeat this process for each former employer.	

2.0.13 Education History Section

As part of completing the job application, the applicant's education history should be recorded. The education history can also be added to the record of any employee of the organization. This section has one sub-section

Add Education

Add Education History	
In the person's record, Click Education History in the left menu to jump to the **"Education History"** section or scroll down to reach to the **Education History** section. Click Add Education.	

The Education History form opens. Enter the **Institution Name**. Enter the **Institution Location** (optional). Select the **Year of Graduation**; leave this option blank if education is still in process. Type or select the **Degree** earned. Enter the **Major** (optional). Click Confirm and confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it. **NB:** *The field(s) with an asterisk sign **(*)** are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.*	
The past education displays in the person's record under the **"Education History"** section. Click Update This Information beside the employer to edit any of the fields, if necessary. Repeat this process for each educational institution attended. You can even record the education history from Nursery Level up to where the employee has attended	

2.0.14 Notes

At any time, an HR Staff person or an HR Manager may add notes to a person's record. All notes are saved to a log and may be reviewed as necessary.

Add Note

Add Note	
In the person's record, Click Notes in the left menu to jump to the **"Notes"** section or scroll down. Click Add Note.	
The Add/Update Notes form opens. Enter a **Date Added** for the note; if no date is entered, today's date is saved by default. Enter the text of the **Note**. Click Confirm and confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it. **NB:** *The field(s) with an asterisk sign **(*)** are mandatory field thus failing to fill the information will give an error. Thus make sure you have filled those fields correctly.*	
All notes will appear at the bottom of the person's record under the **"Notes"** section. Click Update this Information beside the notes to edit or correct the information. Repeat these steps to add additional notes each time you seem it is important to to so.	

2.0.15 Leave Information Section

At any time, an HR Staff person or an HR Manager may record all leaves which an employee may take. All leaves are saved to a log and may be reviewed as necessary. This section has one sub-section

Add Leave

Add Leave	
In the person's record, Click Leave Information in the left menu to jump to the **"Leave Information"** section or scroll down. Click Add Leave.	
The Add/Update Leave form opens. Select the **Leave Type** Enter a **Start Date** and **End Date** for the leave; if no date is entered, today's date is saved by default. Enter **Duration (in Days)** which an employee has spend during the leave. Click Confirm and confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it.	
All Leave information will appear at the bottom of the person's record under the **"Leave Information"** section. Click Update this information beside the leave to edit the information if necessary. Repeat these steps to add additional leave information each time an employee applies for a leave .	

2.0.16 Records Status Section

This section aims to verify the completeness or incompleteness of the data entered. Literary this should be the last to be entered after confirmation that all the necessary information has been entered and all are correctly at large percent. It has only one sub-section which is supposed to be filled only once.

Add Records Status

Add Record Status	
In the person's record, Click Record Status in the left menu to jump to the **"Record Status"** section or scroll down. Click Add Record Status.	
The Add/Update Record Status form opens. Declare if the information are **Incomplete** by selecting **Yes/No** Declare if the information are **Incorrect** by selecting **Yes/No** Declare if the information are **Duplicate** by selecting **Yes/No** Write any **Comments** Click Confirm and confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it.	
The "Record Status" will appear in the person's/employee's record under **Record Status** section This information is filled only once as you can see there is no option for *Add Record Status* after saving it. To update and correct the Records status click on Update this Information beside the record status information	

2.0.17 Scanned Paper Records

This section is designed to enable those employee's records which are either in softy copy or Hard Copy to be stored into the system by uploading them . The soft copy documents accepted are of formats of .doc, Excel, .odt, .pdf etc.

In the case of Hard copy documents like certificates, passports, letters of appointments, promotions, Cvs which are still in hard copy this can be scanned and then uploaded into the system. The extension files are .jpeg, .jpg, .png etc. This section has one sub-section

Add Scanned Documents

Add Scanned Documents	
In the person's/employee's record, Click Scanned Record in the left menu to jump to the **"Scanned Paper Records"** section or scroll down. Click Add Scanned Document.	
The Add/Update Scanned Paper Record Form opens; Click **Choose File** on **Image** to upload a scanned document into the system against a file/folder where they've been saved Click **Choose File** on **Document** to upload a soft copy document into the system against a file/folder where they've been stored. Enter the **Date** of the upload of this documents to system Enter short descriptive notes in **Description** to describe the documents, this makes it easy to distinguish if there are many of documents saved to that particular person's record Click Confirm and confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it.	
After saving the information will appear on person's/ employee's record below the **Scanned Paper Record** section To edit the information Click Update this Information To add more documents repeats each time the steps above and each time the document is saved it will appear below the **Scanned Paper Record** section.	

Part III: Search Records

3.0 Search Records

After entering an employee or position in the system, the record may be reviewed at any time. Click **Search Record** at any time to be guided in order to locate any record within the system. From the record, additional information can be added or existing information can be updated. The Search Record can be obtained when in **Home** page click on Search Record with red color or at the green strip at the top of the front page . See the Snapshots below

Snapshot 1: Click **Search Records** (red color) to start locating records within the system	Snapshot 2: You can also click the Search Record at the top green strip (See the cursor)

The Search Records is divided into three categories

1. Recent Changes
2. Search Positions
3. Search People

3.0.1 Recent Changes

Follow these steps to locate a recent change made to a form or record, including recently added records and positions. The recent changes only shows data that has been added or changed individual information not above previous seven (7) days ie The changes you have made within the whole past week. After that you have to use the search Position and Search People

From the Home page or left menu, Click Search Records. On the Search Records page either on the left side menu or the right menu (with red), Click Recent Changes.	
The View Recent Form Changes page opens. Select/Click to view recent changes to Person or Position. In this example we are going to use Person	

A list of matching records with changes made **Today** will be displayed on click. You can also choose to review changes made **Yesterday** or **Last Week**. Click on the record you want to review. See the example where the cursor points After Clicking it, it will open the individual information file, thus you will be able to effect changes and any update you want	

3.0.2 Search Position

Follow these steps to locate a position's record in the system.

From the Home page or left menu, Click Search Records. On the Search Records page either on the left side menu or the right menu (with red), Click Search Positions.	
The Position list form opens. Select from the Filters options provided to limit the search by **Cadre, Classification, Position Code, Department, Office/ Workstation, Designation** or **Status**. If an option is not selected, all records will be searched. Eg. We want to search for all positions under Accountants *Cadre* which are at Kibaha DC HQ with *Designation* Accountant II and *Status* Closed (All positions which have been filled by an employee) Click the **Search** button to show all matching results.	
A list of matching positions displays. Click on either **Code** or the **Designation Title** of the position you want to review. (see the cursor) To search again, select new options from the Search form and click **Search**.	
When you click the **position code** or the **designation title** of the position, the position record displays, showing all information about the position and the name of the employee currently holding the position, if any *(remember status we choose Closed)*. From this screen, you can update the position information by Clicking Update this Information beside the position information. Click Select another position to see another position or view and update the employee's record by clicking View Person under **Position Filled By.**	

3.0.3 Search People

Follow these steps to locate an employee's record in the system.

From the Home page or left menu, Click Search Records. On the Search Records page either on the left side menu or the right menu (with red), Click Search People.	
The Search People from opens with option filters to help you to get the results quick and In the **Employee Status** menu, select the type of record to search for: Applicant, Employee, Old Employee or Old Applicant. Leave blank to search all employees. To find a single record you can either enter **Check Number, PF. Number** or **TSD Number** since this are unique. Limit the search to a particular Office/Workstation (Office/ Workstation) by selecting the name from the **Office/ Workstation** filter menu. Leave blank to search people (employees)for all facilities. Limit the search to a particular Designation or Cadre by selecting that *Designation title* or *Designation Cadre* from the **Designation** filter or **Designation Cadre** filter menu. Leave blank to search all for all Cadres and Designation. Enter the person's **First Name** and **Surname** to find a single record or leave blank to find multiple records. Click the **Search** button to show all matching results.	
A list of matching records displays. Click the name of the person whose record you want to review. (see the cursor) After Clicking the name **(Surname** or **First Name)** will open the person individual information To search again, select new options from the Search form and click **Search**.	
Now from the person's records you can perform any changes and update to the data. Remember you can use the left menu side to jump quickly to the information you want to edit or scroll downward. Clicking the Update this Information beside the information will open the information and you can edit them.	

Note:

During Entering Employee Information, Data entry clerks may forget to set position to an employee. If that happen then the employee will not appear in a list of employee instead will bear an Employee Status of ***Old Applicant*.**

You can see those employee by using the Search People Report and Filter them as ***<u>Old Applicant.</u>*** Then Click on **<u>Search</u>** button and you will get the list of all employee which has not been assigned position. Click on either **Surname** or **First Name** to open the person employee's file. In case you cant see the position then you've to Administer it first as standard list (See Part I and Part II of this Manual for Adding Position and Setting Position to an Employee)	

Part IV: Run Reports in LGHRIS

4.0 View Reports

Reports enable analysis of employees data in various ways. Thus the reports will reflect on the quality and quantity of data which has been entered into the system. The reports has been categorized into Four types depending on the type of analyzed data namely;

- Table (On-line) – This displays information on click and you can analyze them online
- Export (Excel) – You can also export data into Excel Format
- Print (PDF) – This prints reports into PDF
- Charts (Graphs) – This provides statistical data

Click <u>View Reports</u> on the home page or left side menu to run, print and export standard or customized reports of employees and Offices/Workstations, statistical charts and other pre-configured

(ad-hoc) reports. Administrators can define report relationships, reports and report views for other users to access; Managers can also create new report views.

To access the reports, Click <u>View Reports</u> in the main menu or left navigation menu. All of the saved report views are displayed.	
Reports are organized by category depending on the type of data displayed. Pre-defined categories include • Office/Workstation Report, • Filled Position, • Establishment Reports, • Position Reports, • Office/Workstation Reports, • TANGE REPORTS • Staff Reports and • Search.	

To run a report, click on its name. Reports will display according to the set default view - either as a table, pie chart, or bar chart. For table display, change the sort order by clicking any column name. In most table reports, you can also click an employee's name, a position title or code, or a Office/Workstation name to display the full record for that person, position or Office/Workstation. Eg. Office/Workstation List	

4.0.1 Filtering Reports

Under **"Choose options to limit results,"** there are filtering options to limit the data analyzed. The filters differ depending on the type of report selected. For example, some reports can be filtered by gender, so that only results for male or female employees will be shown. Others can be filtered by cadre, birth date, or Office/ Workstation, to limit the analyzed data to a particular location. If no filters are selected, then the report will include all data entered in the system. Once you have selected filters and other settings for the report, Click the **Table** button to display the report with your selected changes.	

4.0.2 Charting/Graphs Reports

Table reports can be converted to charts, and charts can be displayed differently. First, select the charting options by clicking on the **<u>Chart</u>** button. After Clicking the **<u>Chart</u>** Button the pop-up window named **'Chart Option'** appears. Use the pop-up window to set your chart report as you wish. Eg. The Gender/Sex statistical You can graph the data in pie chart, bar chart, column chart or scatter plot form. You must also select whether to chart one or two fields and which fields to display in the chart. Once the charting options are set, Click the **<u>Chart</u>** button on the pop-up window to display the report as a chart with the selected options.	
From above we have set our **Chart Style** as Pie Chart and **Displayed Fields** as One Field (Total) to show as the Gender/Sex Distribution From the Graph There are three Genders • Male • Female • Unknown • • The Unknown Gender/Sex is because some employees has not been assigned their Gender/Sex	
In this example we are setting the **Displayed Field** as Two Fields (Total) and we want to draw a graph to show Distribution of Gender among Departments Remember Click **<u>Chart</u>** and set up those parameters above on the *Chart Options pop-up window.* Then Click **Chart** on the pop-up window to Get your Graph	
The Departments – Gender/Sex Distribution You can see that some employees has also not assigned department they belong apart from those who have not been assigned their sex. Thus the graphical reports helps as in assessing the quality of our data and if there is any shortcoming we can edit them.	

4.0.3 Exporting Report to Excel

Click the **Export** button to export the report data for use in Excel spreadsheets and other systems. Once you click **Export** the pop-up window named **'Export Option'** appears. You have to set the **File Type** and the **Compression Option** The default is to export the data as a *comma-separated values* file suitable for importing into Excel and *no compression*. To export in tab-delimited or HTML format, choose from the drop down menu in File Type and also you can choose drop down menu for Compression either in (gzip, bz2 or zip type files). You will be prompted to open or save the file to a location on your computer. Thus you can direct to a folder/file you have prepared to store your information.	
Depending on your Operating System If you are using Window after Clicking on **Export** on the pop-up window then you will get your data directly in excel file otherwise you have to perform some setting in order to get it cleanly. If you are using Ubuntu make sure you have set your .csv file as follows Tick on semicolon, Comma , Space and Select the Text delimiter. Click on **OK** Button to get your Data into Excel File.	
Here is your Excel File with all your Data. Enjoy your data in excel	

4.0.4 Print Report to PDF

Click the **<u>Print</u>** button to Print the report data for use in PDF formats. Once you click **<u>Print</u>** the pop-up window named **'Print Option'** appears. You have to set the **Paper Size** from the drop-down list of paper size (Default is LETTER) and the **Orientation** form the drop-down (Portrait/Landscape) Eg. *Paper Size*= A4, *Orientation= Landscape* **NB:** Your setting depend on the number of fields of your report Eg. TANGE – Report will print better with **A3** *paper size* and **Landscape** *orientation* settings You will be prompted to open or save the file to a location on your computer. Thus you can direct to a folder/file you have prepared to store your information	
This is your PDF Example **NB:** Some browsers don't offer the option to download the PDF instead it displays it on it. You can download it by Going to **File > Save Page As** Then save, You will be prompted to open or save the file to a location on your computer. Thus you can direct to a folder/ file you have prepared to store your information	