Viewpoint

Jobpac Connect™

Human Resource Management
Module Guide
Version: 1.0

Document Control Table

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Change History

Version	Date	Author	Description of Changes
1.0	31/05/2022	DMB	Initial Release

Table of Contents

Introduction

The Human Resource Management (HRM) Module is designed to be used in conjunction with the Payroll Module within the system. The Payroll Module is used to set up employee records, such as Name, Commencement Date, Tax File Number and other payroll data.

In the HRM Module it extends the range of data that can be entered, maintained and extracted for every employee and past employee in the database. The module also retains a record of the events in the employee's history that is not possible in the Payroll Module.

HRM adds to the scope of the functions supported including the recruitment and development of employees, as well as occupational health and safety, incident management and reporting.

Changes to organisation's HR Policies and Procedures inevitably occur and changes to the configuration settings can be made by your Jobpac Systems Administrator as required.

NB.   The HR Module does not include employee rates of pay. It is not possible in the HR Enquiry to see what someone earns.

Objectives of this Reference Guide

To provide user information on the module functionality, including:

- Establish, manage and maintain Positions for all roles within the company.
- Define the relationship between Positions to reflect the organisational structure of the company.
- Establish consistent and common Training related details for all staff such as competencies, qualifications, courses undertaken.
- Establish and maintain records of Induction procedures followed for individuals employed by the company.
- Record and manage Appraisal process undertaken by the organisation for relevant employees.
- Maintain an Occupational Health and Safety process, including an Incident Register that supports recording details of both injuries that have actually occurred and near miss incidents in the workplace.
- Provide comprehensive reports and enquiries.
- Include expiry dates so that HR Staff can view lists of licenses that are due for renewal.
- Allow employees with access to Jobpac to access their own Personal Records and update changes of address, emergency contacts and phone numbers.
- Allow employees with access to Jobpac to view their Training Records, Equipment that has been issued to them, Leave Accruals and Records of Leave Taken.
- Provide a security hierarchy to permit appropriate access to various staff according to business unit and operational function within the Human Resources modules.

Overview of the HRM Module

Positions

A table of positions forms the basis for defining the organisational structure to be used in the HRM module. They are arranged into Business Units and Business Sub Units for reporting and security management.

Training

The Training section provides organisations with tools to customise the configuration of the training reporting and management section. The organisation is able to establish tables of Providers, Competencies, Training Classifications, Training Classification Types, Qualification Codes and Qualification Types.

Development

The Development section provides the tools to configure the Induction and Appraisal types that are needed by the organisation.

Recruitment

Both Positions Vacant and Job Applications are managed throughout the workflow cycle via the Recruitment Positions and Applications tables that are set up for the organisation. The organisation is able to establish tables of Recruiting Methods, Recruiting Status, Application Stages and Application Sources.

Equipment/Other

The Equipment section provides the tools to configure the Equipment Types and Locations that are needed by the organisation.

Security

The HRM Module has extensive security components developed to control access to the system. Access to the data can be controlled by business unit and sub-unit and within that, view access and maintenance access are controlled separately.

The security options are comprehensive and complex so the tables are refreshed after maintenance in a "rebuild" run.

Occupational Health & Safety

The Occupational Health and Safety section has two components; a table of incident and injury codes and a register of incidents with information relating to Occupational Health & Safety issues. The Injury Codes may be configured according to Worksafe Australia's National Standard.

Setup Process

The HRM Module requires that the Jobpac Payroll Module has been installed and employees to be included in the HR module are loaded. However, the HRM Module runs across work-ids in a way that the Payroll Module does not. For example, a user can appoint an employee in one work-id to a position in another work-id, provided that the user's security profile is set up to permit the access. Please note that this will not trigger any action in the Payroll Module.

Outline

The steps to follow in setting up the module are:-

1. Setup Organisation Structure. i.e. Business Units and Sub units.
2. Setup Classifications for all positions
3. Add Positions for all staff within the Organisation Structure
4. Link the Employees with their Userids (Done in the ETS module)
5. Give yourself (i.e. Person setting this up) access to all employees
6. Run the Security Rebuild function. Employees can now be seen in the HR Enquiry
7. Assign all employees to a position
8. Setup Full User Security
9. Update Employee Training
10. Update equipment issued to employee

Coding Standards

There are some points to note about coding standards because they have an impact on operations.

Business Units and Business Sub Units:-

There is a start and finish option for Business Units and Business Sub Units in the Positions Report. You may want to consider that in when setting up the unit keys.

Position Classification table:-

There is a start and finish option for the Position Classification in the HR Positions Report. You may want to report on a range of classifications so a set of positions in an order rather than an abbreviated name as a classification code may be needed.

Positions table:-

It is advisable to give careful thought to position numbering; there may be some benefit in allocating position numbers in a range so that they can be added easily. Remember that there is a Work ID, Business Unit Business Sub Unit structure to handle the organisational structure and give it flexibility. The Position Classification can handle groups of positions and allow flexibility of grouping.

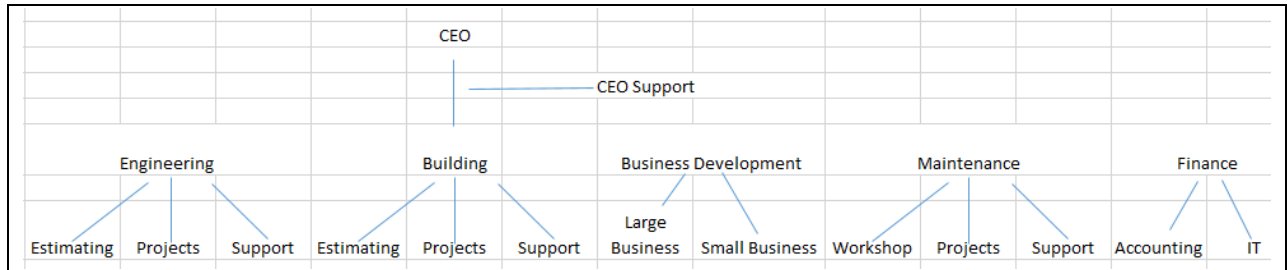## Setup Organisation Structure

Human Resource Management

Setup Business Units and Business Subunits. These need to reflect the organisation Structure
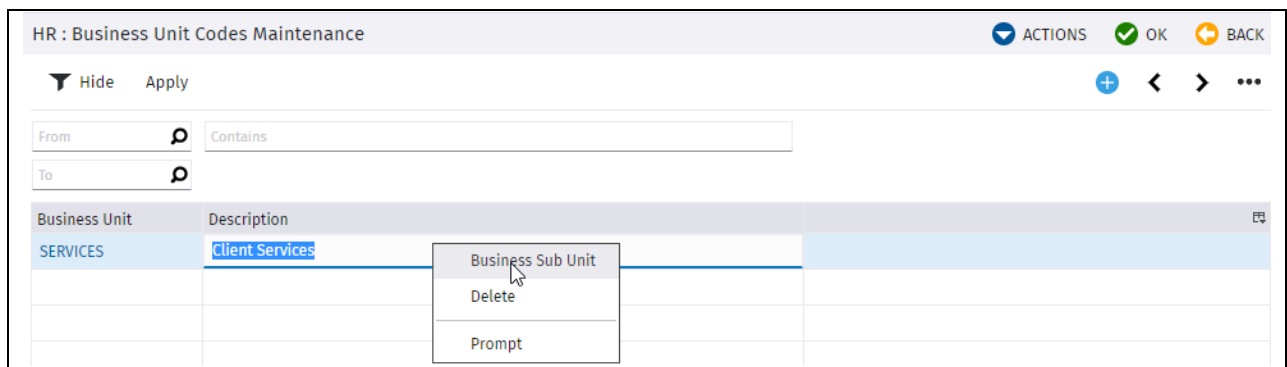
For example.

Engineering, Building, Business Development, etc., are Business Units

Estimating, Projects, Support are Business Sub Units

Use option Maintain Business Units

Setup Classifications for all Positions

An example of position classifications for Construction Company could be

- Director   (Senior Manager)
- Business Unit Manager
- Project Manager
- Contract Administrator
- Estimator
- Sales
- Support

Set these up using Maintain Position Classification

HR : Position Classification Codes		ACTIONS	OK	BACK

Hide   Apply

From	Contains
To	

Position Classification	Description	
CONSULTANT	Consultant	
DIRECTOR	Director	
MANAGER	Manager	
SUPPORT	Support Staff	

Setup all Positions

Each position within the company needs to be set up, including vacant positions.

Use option **Maintain Positions**

HR : Positions Maintenance		ACTIONS	OK	BACK

OCCUPANT   LINE MANAGER

	Prompt
	Refresh
	Add New Position
	Next Tab

Hide   Apply

☐ Show Vacant Positions Only   ☐ Show Inactive Positions

From	Contains	From	From		Contains	Contains	
To		To	To		To		

Position#	Title	Proj Wkid	Project Number	Position Classi	Surname	Given Names	Type	
1001	Director, Client Services			DIRECTOR	Casey	Emily	F	
1002	PS Consultant			CONSULTANT	Bourke	Damien Michael	F	
1003	Support officer			SUPPORT	Baker	Liam	F	
1004	Project Manager			MANAGER	Hill	Gina	F	

Select **Add New Position** from the **Actions** menu.

HR : Maintain Position - Details		ACTIONS	OK	BACK

Position Number	
Position Title	
Business Unit	
Bus Sub Unit	
Project Work Id	
Project Number	
Position Classification	
Full Time Equivalent %	100.00
Principal Line Management Position	
Position that Approves Leave	
Position of Senior Report	
Position Type	○ Full Time ○ Part Time ○ Shared ○ Inactive

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Field Name	Description
Position Number	All positions have a unique position number, and the format may be configured according to the Jobpac Customer requirements.
Position title	All positions relate to a specific position number.
Business Unit	Business Unit that the position exists in.
Business Sub Unit	Business Subunit that the position exists in
Project Work Id	Optional.
Project Number	Optional. The specific project for which the position is engaged.
Position Classification	Choose one of the established classifications.
Full Time Equivalent%	Customers may typically choose from 100%, 60%, & 40%.
Principal Line Management Position	Link the position to the Line Manager who would be the immediate report of the position. More than one Line Manager can be referenced to each position, if required. To do this select Other Line Managers for the Actions menu.
Position that Approves Leave	For example – 2 levels higher than the employee in question.
Position of Senior Report	Hire/Fire position
Position Type	Choose the appropriate radio button -Full Time, Part Time or Shared.

Security Access for SETUP

In order to complete setup, the person doing the setup must have access to all employees. The full security options are addressed later in this document, however to get access to all employees for HR setup use the option **Maintain User Security**.

Select each of the staff who are going to set this up.

Leave all entry fields at the top blank, and tick 'Access to All'

Then select Maintain Usr/Emp Security, and tick Y for the required people.

This will ensure all employees will be visible in HR Enquiry.

Link Userids to Employees.

If you are already using Electronic Time Sheet (ETS), then this will be done. If not, go to

ETS User Maintenance

Select each Userid, and link them to an employee. Use lookups.

Build the Security Table that underlies this module

Run the option Rebuild Userid/Employee Security. This ensures anyone signing on to the HR Enquiry can only see themselves, until the organisation structure is implemented. I.e. employees associated with positions.

Assign Employees to Positions

Note: Within the HRM Module, it is only possible to appoint one person to a full time role. Alternatively 2 people could be appointed to a shared role, such as: 1 x 60% 1 x 40%=100%. In this case, the Position must be set up as a Shared Role in Positions Maintenance.

Select the option **Maintain Positions,** then select each position and assign an employee

Select **Appoint/Transfer Employee,** and enter the employ id and a start date in that position.

Establish Security and Access requirements

Security in the HRM module is follows some specific rules:

1. Users can always see their own data.
2. Managers, i.e. with staff reporting to them, can see themselves and their staff.
3. Individuals can be given access to all staff in a Business unit, e.g. Business Unit Manager's PA
4. Individuals can be given access to all staff in all Business units, e.g. CEO's PA or HR Staff
5. Individuals can be given access to specific other employees.

Individuals can also be given access to specific enquiries and reports and functions related to themselves or others to which they have access.

It is also important to remember that, because the security is complex, it is necessary to run the rebuild security program every time changes are made to the security setup.

Set up Administration Users

See Security access for setup users and Administrators previously in this document

Maintain User Security

Maintain User Security is configured on a per user basis. It is from this screen that the User Id is provided with access to various reports and employee records for other employees (as in the case of a Line Manager).

From the Jobpac Main menu select >Human Resources >Security >Maintain User Security

To limit a User to viewing his/her personal details only, select the required User Id.

Then select Workid, Business Unit, Business Sub Unit, and individual functions, as required

If Workid, Business Unit, Business Sub Unit are left blank, then this will apply to all Workids, Business Units, Business Sub Units.

Maintain User/Employee Security

This allows the administrator to give access to users to other employees

From the Jobpac Main menu select >Human Resources >Security >Maintain User/Emp Security

Change Access to all to Y, if access is required to all employees. A business unit can also be added to limit access to that Business Unit.

To give access to just specific employees, leave the Access to All at N, and select the userid. Then select the specific employees who will be able to be accessed by the userid.

Maintain Employee Exclusion

To exclude/include specific employees from the HR System, select **Maintain Emp Exclusion**

Menu item.

Select the relevant employee and change N (Not excluded) to Y by using the right click option:

- Exclude Employee = Y

- Remove Exclusion = N

Rebuild User/Employee Security

Following any maintenance activities of User/Employee maintenance of Security Settings, it is necessary to rebuild the security tables.

From the Jobpac Main menu select >Human Resources >Security >Rebuild User/Emp Security

Position Maintenance

Transfer and Employee from a Position

Select the position for the employee transfer from the Positions Maintenance Screen. Enter the Vacated Date for the person leaving that position.

Then add a new person to that position

Wkid	Employee	Surname	Given Names	Start	Vacated	
910	BOURKEDM	Bourke	Damien Michael	1/01/2022	21/03/2022	
910	HINDMAS	Roberts	John	22/03/2022		

HRM : Appoint/Transfer Employee Maintenance   ACTIONS   OK   BACK

Position Number   1002   PS Consultant

Training Maintenance

A diverse range of training information can be retained. Retention of competencies achieved and recording of all training and qualifications supports management in being alerted to licences or competencies requiring renewal.

The following need to be setup to use this function

- Maintain Trade Competency
- Maintain Training Classifications
- Maintain Training Classification Types
- Maintain Qualification Codes
- Maintain Qualification Types
- Maintain Training Providers

Maintain Trade Competency

From the Jobpac Main menu select

>Human Resources >Training >Maintain Trade Competency

Competency Code	Name	Description	Renewal Period (Months)	
CONTRACTOR	Contractor Licence	Electrical - issued by NSW Dept of Fair Training expires after 3 years	36	
CRANE DVER	Crane Drivers License	Issued by Workcover NSW National Cert of Competency		
DOGGING	Basic Dogging License	Issued by Workcover NSW National Cert of Competency	60	
ELECTRICAL	Systems Electrican	Trade		
FIREPROTCT	Fire Protection	Fire Protection		
FIREWARDEN	Fire/Evacuation Warden	Training Provided by proprietor of the building	6	
FIRST AID	Senior First Aid Certificate	Issued by St.John's Ambulance partial re certification Annually	12	

Add new competencies directly into this table

Maintain Training Classification Types

These represent broad categories of training, and can be used in reporting and enquiries

>Human Resources >Training >Maintain Training Classification Types

Human Resource Management

Maintain Training Classification Types

Choose ADD from the Actions Menu, complete Training Class Type and description, and then click OK to save.

Maintain Training Classification Codes

These represent training groups within Training classification Types

From the Jobpac Main menu select >Human Resources >Training >Maintain Training Classification Codes

Maintain Training Classification Codes

Field Name	Description
Training Classification Code	Short Reference to the name of the training.
Name	Type of training in the classification.
Description	Full description of the training classification.
Training Class Type	Use one of the Training Classification types already setup

Select ADD from the Actions menu, complete details and click OK to confirm.

Maintain Qualification Types

These represent broad groups of Qualifications

From the Jobpac Main menu select >Human Resources >Training >Maintain Qualification Types

Qualification Type	Description
BUILD DEG	Building Degree
CERT	Certificate
DIPLOMA	Diploma
ENG DEG	Engineering Degree
EXAMPLE	Example Qualification Type
OTHER DEG	Other Degree

HR : Maintain Qualification Types · ACTIONS OK BACK
Hide   Apply

Maintain Qualification Codes

These represent specific qualifications.

From the Jobpac Main menu select >Human Resources >Training >Maintain Qualification Codes

HR : Maintain Qualification Codes · ACTIONS OK BACK
Hide   Apply

Qualification Code	Name	Description	Qualification Type
1000	Certified Practising Accountan	CPA Certified Practising Accountant	CPA
1001	Chartered Accountant	CA Chartered Accountant	CA
1002	Master of Construction Mment	Master of Construction Management Melb School of Design, Uni Melb	MST CONST
1004	Planning & Design Prof Dev	Planning & Design Professional Development, Melb School of Design	PLANDESIGN
2003	Bachelor of Construction	Bachelor of Construction University of Technology Sydney (UTS)	BCH CONST
2005	Bachelor of Property Econ	Bachelor of Property Economics UTS	BCH PRO EC
2009	Master App SC Building Studies	Master of Applied Science Building Studies UTS	MST BUILD
2015	Bachelor Civil Eng	Bachelor Civil Engineering UTS	BCH CIV EN
2020	Master of Planning	Master of Planning UTS	MST PLAN
2025	Master of Project Management	Master of Project Management University of Technology Sydney (UTS)	MST PLAN
2030	Master of Property Development	Master of Property Development UTS	MST PTYDEV

Select ADD from the Actions menu, complete the details as required and click OK to save.

Maintain Training Providers

A list of training providers can be maintained, linked to creditors. These can be associated with specific training courses.

From the Jobpac Main menu select >Human Resources >Training >Maintain Training Providers

Maintain Training Providers - Listing

Field Name	Description
Provider	Abbreviated Name of the Provider. Code
Name	Full Name of the Provider.
Cred Wkid	Creditor Work ID
Creditor	Creditor Id
Creditor Name	Full name of the Creditor.

Select ADD from the Actions menu to activate the screen. Complete Details as required, and click OK.

Human Resource Management

Within the Maintain Training Providers – Listing screen, you can add the type of training offered

Right click and choose ▶Add Training.

Maintain Providers - Training Codes

Field Name	Description
Code	Right click to scan for the previously configured Training Codes. This scan displays a combination of Training codes, Competency codes, and Qualification codes.
Type	C = Trade Competency, T = Training Classification, Q = Qualification.
Name	Shortened Name of the Training Code.
Description	Full Description of the Training Code.

Employee Development

This area is used for the planning of career paths for existing employees. It provides access to and maintenance of all records relating to employee appraisals, as well as plan and schedule appraisals in advance. This provides Line Managers and HR Representatives with adequate notice, to ensure formal completion, documentation and retention of records in a timely manner and according to organisational requirements.

Maintain Induction Types

From the Jobpac Main menu select >Human Resources >Development >Maintain Induction Types

Choose Add Induction Type from the Actions Menu, complete details including type code and description and click OK to save.

Field Name	Description
Induction Type Code	Abbreviated name for the Induction Type.
Description	Full Description of the Induction Type code.

Maintain Appraisal Types

From the Jobpac Main menu select >Human Resources >Development >Maintain Appraisal Types

Procedure: Add Appraisal Record

From the Jobpac Main menu select >Human Resources >HR Enquiry/Maintenance >Development Tab

Select **Add Appraisal** from the Actions menu, complete detail as required & click OK.

HR Enquiry-Development Details

Field Name	Description	Type
Work Id, Employee	Work Id that the employee is attached to, and Employee Reference Number as defined in the Payroll System.	E
Appraisal/ Review type	Choose from Performance, Salary and 360 review. May be defined according to requirements – refer to Appraisal Review Type Setup.	E
Year/Sequence	The year the appraisal took place, and the sequence refers to the appraisal number in the year. For example, 2009 Seq 1 is the first appraisal during the calendar year 2009.	E
Date Planned/Completed	Enter the date planned for completion, and enter the date the appraisal was actually completed.	E
Mgr Appraiser Work Id	Work Id that the appraiser is attached to.	E
Manager Appraiser	Enter the appraiser's employee reference number.	E

Manager Appraiser Comments	This area may be reserved for Appraiser Comments.	E
HR Appraiser Work Id	Enter the HR Appraiser's WorkId.	E
HR Appraiser	Enter the HR appraiser's employee reference number.	E
HR Appraiser Comments	This area may be reserved for Appraiser Comments.	E

Recruitment

Within the HRM Module, both Positions Vacant and Job Applications are managed throughout the workflow cycle via the Recruitment Positions and Applications tabs.

Maintenance of the codes that supports these business processes is accessed via the Recruitment menu option in the Human Resources menu.

Maintain Application Stage Codes

From the Jobpac Main menu select >Human Resources >Recruitment >Maintain Appl Stage Codes

Maintain Application Stage Codes

Select A**dd Stage** from the Actions Menu, add new Stage Code details as required, and click OK to save.

Maintain Application Sources

From the Jobpac Main menu select >Human Resources >Recruitment >Maintain Appl Source Codes

Maintain Application Source Codes

Maintain Recruiting Methods

From the Jobpac Main menu select >Human Resources >Recruitment >Maintain Recruiting Methods

Recruiting Method	Description
1 EMP AG	Employment Agency
2 INTERNET	Internet Job Board
3 EMP REF	Employee Referal

Maintain Recruiting Method

Choose **Add Recruiting Method** from the Actions Menu, complete details as required and click OK to save.

Maintain Recruiting Status

From the Jobpac Main menu select >Human Resources >Recruitment >Maintain Recruiting Stages

Recruiting Status	Description
1VACANT	Vacant Position
2ADVERT	Advertised
3INTERVIEW	Currently Interviewing
4SHORTLIST	Short List
5 2ND I/V	2nd Interview
6 L OF O	Letter of Offer
7 REJECT	Application unsuccessfull ltr
8 RECRUITE	Recruited

Maintain Recruiting Status
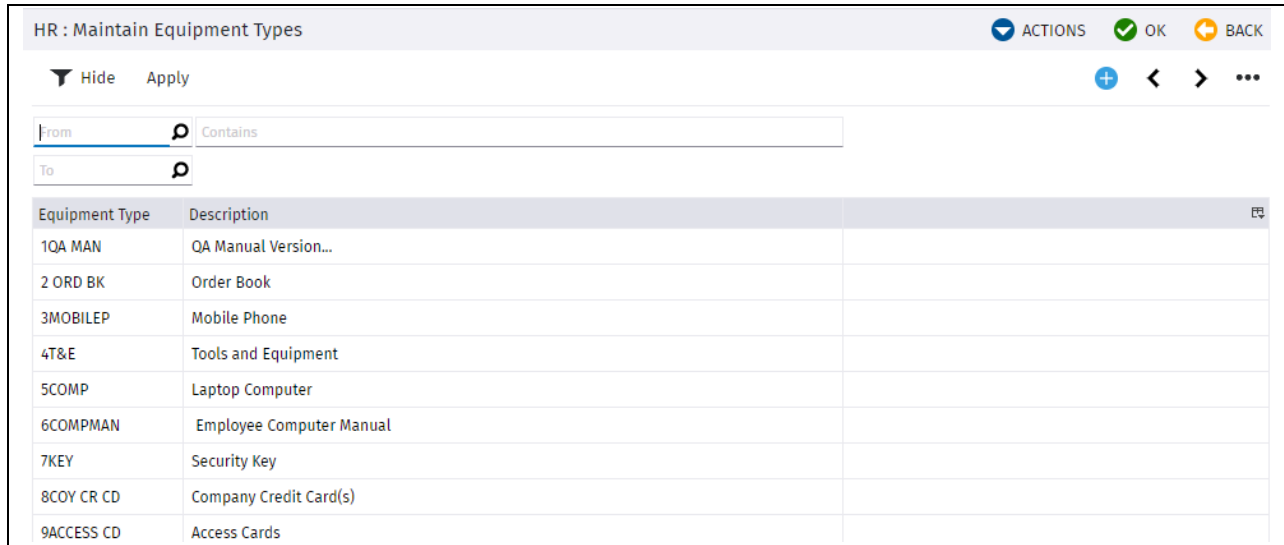
Choose **Add Recruiting Status** from the Actions Menu, complete details as required and click OK to save.

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Equipment

The HRM Module provides the ability to maintain an Equipment Register to keep track of
equipment issued to employees during the course of their employment.

Maintain Equipment Type Codes

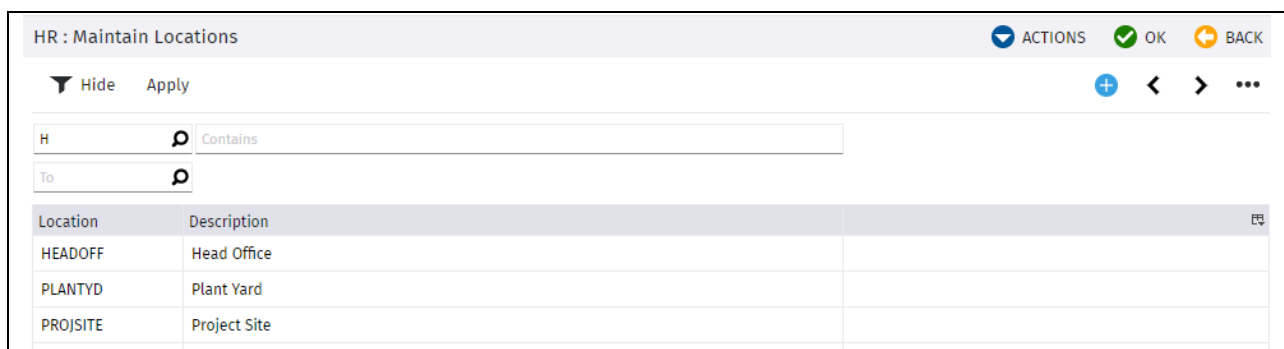From the Jobpac Main menu select >Human Resources >Equipment/Other > Maintain Equip
Type Codes

Maintain Equipment Type Codes.

To Add Equipment, Choose **Add Equipment Code** from the Actions Menu.

Maintain Locations

From the Jobpac Main menu select >Human Resources >Equipment/Other >Maintain Locations

Maintain Locations screen

Choose Add **Location** from the Actions Menu, complete details as required and click OK to
save.

Occupational Health & Safety

Recording of all injuries and incidents that result in a near miss that organisations have the responsibility to record is supported by the O H & S Menu option Incident Register.

Access to fundamental information relating to ongoing Occupational Health & Safety issues, is provided from a historical perspective in the Incident/Injury Register. A significant amount of personal and incident/injury specific data is recorded in this section.

Maintenance of Injury Codes that may be pre-configured according to Worksafe Australia National Standard is accessed via Maintain Injury Codes.

Maintain Incident Codes

A standard list of Incident codes is preconfigured. It can be added to or changes as required.

From the Jobpac Main menu select >Human Resources > Occ Health & Safety >Maintain Incident Codes

Code	Description
00	INCIDENT
01	Fracture (excluding of vertebral column)
02	Fracture of vertebral column with or without mention of spinal cord lesion
03	Dislocations
04	Sprains and strains of joints and adjacent muscles (including acute trauma sparins and strains only)
05	Intracranial injury, including concussion
06	Internal injury of chest, abdomen and pelvis
07	Traumatic amputation, including enucleation of eye (loss of eyeball)
08	Open wound not invlving traumatic amputation
09	Superficial injury
10	Contusion with intact skin surface and crushing injury, excluding those with fracture
11	Foreign body on external eye, in ear or nose or in respiratory, digestive or reproductive systems (including choking)
12	Burns
13	Injuries to nerves and spinal cord without evidence of spinal bone injury
14	Poisoning and toxic effects of substances
15	Effects of weather, exposure, air pressure and other external causes (including bends, drowning, electrocution)
16	Multiple injuries (only to be used where no principal injury can be identified)

Choose from the **Action** Menu to view the preconfigured Bodily Location, Mechanism or Agency codes available.

Choose **Add Code** from the Actions Menu, complete details as required Jand click OK to save.

Human Resource Management

Maintain Incident Types

Procedure: Maintain Incident Types

From the Jobpac Main menu select >Human Resources >Occ Health & Safety >Maintain Incident Types

HR : Maintain Incident Types			
Incident Type	Description		Lost Time Injury
LTI	Loss time incident		Y
MT	Medical treatment		N

Choose **Add Incident Type** from the Actions Menu, complete details as required and click OK to save.

Incident Register

From the Jobpac Main menu select >Human Resources >Occ Health & Safety >Injury Register

Incident Reference Number	J/L Wkid	Job/Locn Code	Job/Location Name	Emp Wkid	Employee Code	Employee Name	Date	Incident Type	LTI
00000001	622	CP001	ELECTRICAL WORKS 2007	622	300	Robert Henry Dixon	30/01/2005	MT	N
00001	622	NPC01	STRATHFIELD APARTMENTS	622	100	Alexander Brian Addi...	30/03/2009	LTI	Y
00003	622	CAR01	KARRINGTON APARTMENTs	622	763	Georgio Haslam	15/04/2009	MT	N
00004	622	CAR01	KARRINGTON APARTMENTs	622	411	John Smith Horn	7/04/2009	LTI	Y
00005	622	JFTA01	JFTA HIGH ST REFURBISHMEN	622	745	Wong Wai Chui	10/03/2009	MT	N
00006	622	CP001	ELECTRICAL WORKS 2007	622	781	Daniel Mehra	13/04/2009	MT	N
00007	622	CAR01	KARRINGTON APARTMENTs	622	120	John Michael Adlam	12/03/2004	MT	N
00008	622	KAL02	RL Alignment	622	135	Kevin Winston Ahmed	13/09/2004	LTI	Y
00009	622	CAR01	KARRINGTON APARTMENTs	622	150	John David Alexander	1/09/2005	LTI	Y
090617A	622	CAR01	KARRINGTON APARTMENTs	622	195	George Frederick Bea...	17/06/2009	MT	N
65	622	NPC95	CONSTRUCTION CONTROL	622	249	Rodney Smith Caville	16/04/2009	MT	N

Select **Add Incident** from the Actions menu.

Human Resource Management

Incident Register: Incident Details Screen.

Field	Description
Injury Reference # WorkId/Job Id.	As configured by the Jobpac Customers Requirements
Incident Type	Select Loss Time incident or Medical Incident from lookup
Personal Details	Complete specific details in regard to the Employee/Subcontractor involved in the incident:, Surname/Given Name, Date of Birth, and Male/Female
Basis of Employment	Starting Time – choose from: 0600-1159, 1200-1559, or 1600-0559
	Shift arrangement – choose from: Fixed, standard or Flexible hours/Rotating shift
Job Details	Description of occupation or job title (as in the case of a Subcontractor) and Main tasks performed.
Training Provided	Choose from Induction Training, Task specific training, Both, Neither.
Details of the Incident/ Injury	Date and Time of the Incident.

HR Enquiry/Maintenance

HR Enquiry

This is a comprehensive enquiry giving the user the ability to view and maintain the data in the HRM Module. The ability to view this data and to maintain this data is controlled by the HR security program.

Personal

View and maintain personal information for all employees using a table format providing a high level view of all employees. A right click option gives users the ability to drill down to employee's details such as employee photograph, current location, address, and emergency contact information.

Training

Authorised users can view and maintain training details for all employees. This enables organisations to manage the development and continuity of employee's qualifications and skills as well as ensure compliance with the unique requirements of the construction and engineering industry

Equipment Issued

This provides a register of equipment issued to each employee. Organisations can track equipment issued and ensure that it is properly maintained and returned.

Leave

Authorised users can view employee leave accruals together with updated status of leave taken during the current financial year.

Recruitment Positions

This view is by the position being filled. Recruitment Positions follows the organisation's recruitment lifecycle from the earliest stages of establishing a position and declaring the position vacant, through the formal interview process to a Letter of Offer being issued to the preferred candidate. Recruitment Positions provides a link to both the Project that requires the new resource and the related Position Description.

Applications

This view is by the application for the position being filled. The Applications process supports the management of employment applications by individual through the various stages of the application process.

Development

The Development display is used to view and maintain career path planning for existing employees. The section provides the ability record induction details and to plan and schedule appraisals.

Human Resource Management

Personal Tab

Select   Human Resources >HR Enquiry/Maintenance>Personal Tab

The employees and data to which the user has access will be displayed. In the example below all employees are displayed. For a non-management employee they would only see themselves. Managers see themselves and those reporting to them.

Note that the standard Jobpac filters and selection options are at the top of the screen. Users can restrict the display for ranges of employee numbers, positions, classifications, business units and dates of employment. Users can also search for text in the Surname, Given Name, Known As, and Title fields.

Employee	Surname	Given Names	Known As	Position#	Title	Bus Unit	Sub Unit	Date	Sts
125	Adolphe	Peter Mitchell	Mr GHI	000046	Project Manager	CIVILENG	PROJMGMT	12/08/1998	A
130	Agostino	Michael David	Mr JKL	000088	Civil Engineerin	CIVILENG	PROJMGMT	2/03/2009	A
135	Ahmed	Kevin Winston	Winston	000052	Construction Wor	CIVILENG	PROJMGMT	5/04/2018	A
140	Alderman	Harold Wilson	Harry	000014	Site Engineer	BUILDING	PROJMGMT	9/03/2006	A
150	Alexander	John David	JD	000082	Industrial Relat	HR	IR	26/03/2005	A
180	Armour	George Frederick	Georgie	000077	Planning and Fea	DEVELOP	PLAN	21/09/2019	A
195	Beatty	George Frederick	Mr Beatty	000011	Senior Estimator	BUILDING	ESTIMATE	2/08/2019	A
204	Beasley	Kevin Andrew	Kev	000023	Site Secretary P	BUILDING	PROJMGMT	23/03/2017	A
209	Best	Mary Elizabeth	Mrs Best	000031	Site Secretary P	BUILDING	PROJMGMT	25/01/2019	A
235	Bonello	William Henry	Will	000048	Site Manager B	CIVILENG	PROJMGMT	23/05/2020	A
241	Brennan	Stephanie	Steph	000035	Personal Assista	CIVILENG		27/01/2018	A
249	Caville	Rodney Smith	Smithie	000055	Construction Wor	CIVILENG	PROJMGMT	31/03/2019	A
2490	Caville	Rodney Smith	Smithie					31/03/2019	A
278	Cheung	Boon Ping	Chung	000015	Foreman	BUILDING	PROJMGMT	24/03/2013	A
2780	Cheung	Boon Ping	Chung					24/03/2013	A
280	Coffrey	Susan Frieda	Susie	000079	Sales Consultant	DEVELOP	SALES	13/01/2019	A
298	Devine	George Frederick	Mr Devine	000074	Accounts Clerk	FINANCE	FINACCT	30/08/2018	A

Sort By Surname   Sort By Position#   Sort By Bus Unit   Sort By Bus Subunit

Tabs on the HR Enquiry Screen

Term	Definition
Personal	Fields are as described below in the Personal Tab on the HR Enquiry Screen.
Training	Enquiry mode, lists all training related information for entire organisation in employee reference order.
Equipment Issued	Enquiry mode, lists all equipment issued and the corresponding employee details for the entire organisation.

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Term	Definition
Leave	Enquiry mode, lists all types of leave accruals such as Accrued Annual Leave, Accrued Long Service Leave…
Recruitment Positions	Enquiry mode, lists all positions that are currently being recruited. Also details current status of the position, for example – Advertised, Vacant, Interview, Short List, 2nd Interview, Letter of Offer, Application Unsuccessful.
Applications	Enquiry mode, lists unique application number for each applicant of advertised position together with title of the role, name and date of the applicant and current status of the application.
Development	Lists details of appraisal conducted

Actions Menu on the HR Enquiry Screen

Term	Definition
Prompt	The Prompt is used to scan for existing records when positioned on an appropriate field.
Refresh	Refreshes back to the previous data save.
Next Sort Sequence	Changes the position of columns in the screen presentation detail. Choosing Next Sort Sequence rotates the first column available from Position #, Position Classification, Business Unit, Employee Number.
Add Training	Provides the same function as the right click option to Add Training plan, or details of training that has actually been completed.
Add Equipment	Provides the same function as the right click option on the employee to maintain a register of equipment issued, a description of the equipment, and the name of the employee equipment is issued to.

Right Click options on Employee

Field Name	Description
Details	Personal Details such as Address, Emergency Contacts and photograph of employee.
Add Training	Provides the same function as the right click option to Add Training plan, or training that has actually been completed.
Add Equipment	Provides the same function as the right click option on the employee to maintain a register of equipment issued, a description of the equipment, and the name of the employee equipment is issued to.
Induction	Details of induction type and schedule and outcome.
Assign to Projects	Details of Projects that employee has been assigned to.
Employees Reporting to this Employee	Lists the employees reporting to the employee selected and whether they are Direct or Indirect reports.

Personal Tab Fields on the HR Enquiry Screen

Field Name	Description
Employee	Employee Reference
Surname/Given Names	Employee Name
Known As	This field supports any alternative name that the employee is known by.
Position #	Each position is unique, and up to 8 alpha/numeric characters can be applied. Note that a person is assigned to a position through the Position Maintenance program.
Title	Organisational Title of the Position from the position table. Examples are: Position Number 88 the Position Title is recorded in the system as *Civil Engineering Deputy Manager.*
Bus Unit	Business Unit of the Position from the position table.
Sub Unit	Business Sub Unit of the Position from the position table. These are Sections or Departments that exist within the respective Business Unit.
Date	Date of Commencement of Employment
Sts	Employee Status A=Active, T=Terminated

Add Induction

From the Personal Tab, select the required employee. This displays existing inductions or an empty screen

Enter Induction Type, Inductor Worker Id, and Inductor as required and click OK to save.

Choose Right Click Option Induction Check List and mark as complete or incomplete as required.

- Induction Complete
- Induction Incomplete
- Pre Induction Complete
- Pre Induction Incomplete

HR : Maintain Induction Checklist	ACTIONS	OK	BACK

Employee 125 Peter Mitchell Adolphe
Induction Type PROJECTIND Project Induction

Hide   Apply

Induction Group	Description	Sub Group	Description	Comp Ind	Comp Pre	Date Complete
QAMANUAL	QA Manual	HR CONTACT	HR Contact Details	N		
T & E	Tools and Equipment Safety Induction	DRILL	Electric Pneumatic Drill Safety Inducti			
		HARNESS	Safety Harness Induction			
		JACKHAMMER	Jack Hammer Safety Induction			

Assign to Project

From the Personal Tab, select the required employee. Right click and choose Assign to Projects. Complete Project Work Id, Project, Planned Start/Finish and Actual Start/Finish as required and click OK to save.

HR : Maintain Employee Projects	ACTIONS	OK	BACK

Employee 125   Peter Mitchell Adolphe

Hide   Apply

Proj Wkid	Description	Project	Project Name	Planned Start	Planned Finish	Actual Start	Actual Finis
700	Viewpoint Training	NS001	Narelles Test Job	1/05/2022	31/12/2022		

Human Resource Management

Training Tab

From the Jobpac Main menu select >Human Resources>HR Enquiry/Maintenance >Training Tab

This displays all training courses for each employee. Select the required employee. Right click and choose select the record to modify it.

Select the Add Training option to establish a new training course.

HR enquiry – Training Details

Select from Trade Competencies, Training Classification or Qualification and select OK. Different options are displayed depending on this selection. Complete Details as required.

HR Enquiry – Training Details - Trade Competencies.

Field Name	Description
Type	These are set up in the Training section
	Select from Trade Competencies if the training is specific to employee's Trade – such as completion of an Apprenticeship. These have a field for license number and renewal dates.
	Select Training Classification if the training is of a more generic nature – for example a short Management Course. These have no license, grade or renewal dates.
	Select Qualification if the employee has completed a degree, diploma, certificate or other qualification, or any formal qualification from a recognised institution.
Code	Trade Competency Code – refer to menu option 5 – Maintain Trade Competency (Code).

Field Name	Description
Provider	The name of the institution who oversees the Trade Competency eg TAFE.
Course Name	Name of the Course.
License Number/Grade Achieved/Renewal Date	Details specific to the License Number.
Planned – Start/Finish date	Date of the planned start and finish.
Actual – Start/Finish date	Date of the actual start and finish of the training.
Evaluation Sent/Received	Complete as required.
Cost/Cost Accounting Period/Hours	Actual cost incurred to Employer/ during Accounting Period/ course consisting of number of hours.
Comments	The area where specific comments in relation to training may be entered.

Equipment Tab

This displays all equipment issued to this employee.

From the Jobpac Main menu select >Human Resources>HR Enquiry/Maintenance >Equipment Issued Tab

Equipment Issue TAB

Select the required employee. Right click and choose Details to modify this record. Select **Add Equipment** to add a new equipment issue**.**

Human Resource Management

Complete Work Id, Scan for Employee Number, and Equipment Issued Type Code. Complete details as required and click OK.

HR enquiry – Equipment Details

Field Name	Description
Issue Type Code	For example, Tools & Equipment – may be configured according to requirements.
Reference Number	Configured according to organisation requirements. This is a mandatory field.
Date Issue	Date equipment was issued.
Date Due to Return	Scheduled date of return of equipment.
Date Returned	Actual date equipment returned.
Date Lost	Complete if required.
Description of Issue	Description of the equipment. This is free format text field.

Leave Tab

This screen show accrued leave imported from the payroll system.

Select >Human Resources>HR Enquiry/Maintenance >Access Leave Tab,

Field Name	Description
Employee	Employee Reference as defined in both Payroll and HRM.
Surname/Given Name	Corresponding with the Employee Reference.
Accrued AL	Accrued Annual Leave.
Accrued LSL	Accrued Long Service Leave.
Accrued SL With Cert	Accrued Sick Leave with certificate, for example an employee has 120 hours of Accrued Sick Leave available to be taken with a doctor's certificate.
Accrued SL Without Cert	Accrued Sick Leave without certificate, for example employee may take 8 hours without a doctor's certificate being required.

The user is able to select an employee and display details of the leave accruals and leave taken.

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Recruitment Positions Tab

This displays a list of positions that are vacant and possibly being advertised.

From the Jobpac Main menu

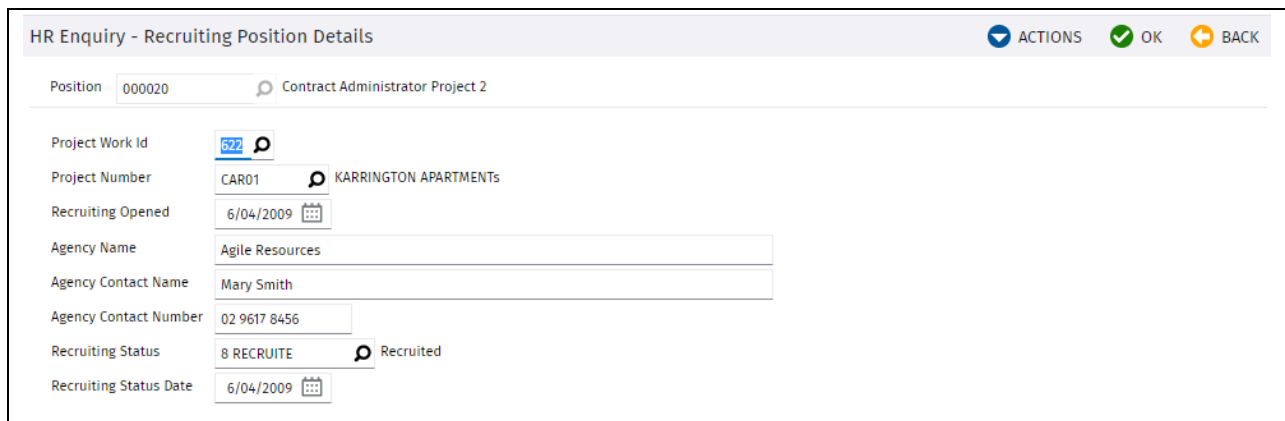Access Recruitment Positions Tab, select the relevant Position #, right click and choose Details.

HR Enquiry – Recruitment Positions Listing

Fields on the HR Enquiry – Recruitment Positions screen

Field Name	Description
Position #	As defined in the organisational structure.
Position Description	As defined in the organisational structure.
Business Unit	The Business Unit under to which the position is assigned.

Field Name	Description
Recruiting Opened	Date that Recruiting for the position commenced.
Agency Name	Name of the employment agent or other recruiting method used for this position.
Agency Contact	Name of the person to be contacted.
Agency Phone	Phone number of the relevant contact.
Status	Equates to the stage that the Recruitment Position has reached such as: Interview Stage.
Status Date	The date the status interview stage was reached such as: Building Manager Position reached Interview Stage on 6th April 09.

On the HR Enquiry, Recruitment Listing Positions screen, select the required position, right click and choose Details to update the status.

Field Name	Description
Recruiting Status	As defined by organisation requirements such as: Advertised, Interview 1, Letter of Offer…
Recruiting Status Date	The date the Recruiting Status proceeded to the next level.

Applications Tab

This displays a list of applications for current positions.

HR Enquiry – Applications Listing

Field Name	Description
App No.	According to organisation requirements such as numbered chronologically on date of receipt.
Position #	Position number reflected in the organisational structure.
Title	Title of the Position that the applicant has applied for.
Bus Unit	Business Unit, related to the Position Number and Organisational Structure.
Date	Usually date the application was received.
Name	Name of the applicant.
Phone/Mobile	Contact details of the applicant.
Status	A (Active) or C (Completed)
Application Stage	Configured according to organisational requirements.
Stage Date	Date that the application reached the corresponding stage.

Right click and choose Details to change these details.

Field Name	Description
Application Number	As defined by employer requirements and Applicant personal and contact details.
Position Number/Date	According to organisational structure.
Application Source	For example – newspaper advertisement, or recruitment agency.
Status	A = Active, C = Completed
Date Advice Sent/Trade	
Last Updated User/Time	Reflects the last update of Application and Applicant Details.

From the Applications Listing screen, selecting the relevant application provides two further right click options: Add Reference, and Add Stage.

Comments	Additional comments relating to the application may be included in this screen.	E

Human Resource Management

Development Tab

This shows the status of all appraisals including inductions.

Bus Unit	Surname	Given Names	Appraisal	Planned Date	Date Comp	Appraiser (Manager)	Appraiser (HR)
BUILDING	Best	Mary Elizabeth	PERFORM	19/06/2009	19/06/2009	John Constan Street	John Constan Street
BUILDING	Best	Mary Elizabeth	PERFORM	19/06/2009	19/06/2009	John Constan Street	Luke Robert Parkes
BUILDING	Vandenburg	Barrie Robert	PERFORM	6/04/2009	6/04/2009	Brian Arlee Rasmussen	Margaret Mary Hassall
BUILDING	Vandenburg	Barrie Robert	PERFORM	10/09/2009	10/09/2009	William BRETT	JOHN BREED
CIVILENG	Adolphe	Peter Mitchell	PERFORM	20/10/2009	20/10/2009	Rodney Smith Caville	Helen Miller
HR	Lee	John Paul	360DEGREE	9/04/2009	9/04/2009	Marie Barnadette Foss	Bernice Natasha Lam

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HR Reports

There is a set of reports for the HRM Module. Please note that the main access point for this module is the Maintenance and Enquiry program, consequently the reports are fundamentally lists rather than management reports.

The reporting requirements for Human Resources reporting across many states and reporting regimes means that the reporting focus in on entering data and classification codes rather than specific needs.

- HR Positions Report – one line per position.
- Position History Report – one line per position occupancy with dates from and to.
- Employee Projects Report – one line per project assignment for each employee.
- Employee Training Report – One line per employee Training, Competence or Qualification entry.
- Competency Report – One line per employee for a selected Competency.
- Completed Training Report –
- Training Costs Report –
- Applications Report –
- Appraisal Report –
- Recruiting Positions Report –
- Employee Equipment Report – items issued to each employee.