Table of Contents

Foreword 11

Part I Introduction 12

Part II Basic Working Procedures 14

1 Installing Software ... 14

2 Getting Started ... 17

Navigation & Data entry operations toolbar_2 ... 17

HOW TO ADD EDIT OR DELETE RECORDS ... 22

Brow sing, Searching and Filtering records ... 22

Brow sing for records ... 23

Searching for records ... 25

Filtering records ... 27

Add & Duplicate Function ... 27

Edit Function ... 29

Delete Function ... 30

Save Function ... 32

Save & New Function ... 33

Cancel Function ... 34

Close Function ... 35

3 Setting Up Users & Security ... 35

4 Setting Up Company Profile & Employees ... 36

Part III Application Main Modules 37

1 Employee Data Managment ... 38

2 Leave Managment Module ... 39

3 Asset Managment Module ... 39

4 Training & Development Module ... 40

Part IV Application Menus & Functions 42

1 File Menu ... 42

Login ... 43

Switch User ... 45

Change Background ... 45

Change Password ... 46

Company Setup ... 47

Location Setup ... 48

Branch ... 49

Region ... 55

Country ... 61

Location ... 67

Configurations ... 73

Security Settings ... 74

Security Setup ... 75

Modules and Menus - security ... 77

© 2014 Enter your company name

Functions ... 82
Search Options ... 88
Filter Options ... 94
Trans. Table Refs ... 100
Reports Setup ... 106
Report Types ... 113
Object Types ... 118
Change Case Utility ... 124
Active Users ... 130
Users List ... 136
Group Permissions ... 142
Location Access ... 144
User Groups ... 145
User Titles ... 152
Logout ... 158
Exit ... 159
2 Employee Module ... 159
Employee Listing/Details ... 160
Personal Information ... 166
General Notes ... 167
Compensation & Benefits ... 168
Job History ... 168
Compensation ... 169
Contract History ... 170
Payments ... 171
Deductions ... 172
Benefits ... 173
Education ... 174
Previous Employers ... 175
Contacts ... 176
Licenses ... 177
Skills ... 178
Infringements & Notices ... 179
Assets Issued ... 180
Attendance ... 181
Training History ... 183
Reminders ... 183
Checklist ... 184
Separated Employees (Inactive) ... 185
My Submitted Work Flows ... 186
My Reminders ... 187
Print Employee IDs ... 188
Employee Job Wizard ... 189
Branch/Department Transfers ... 190
Job Change/Update ... 191
Compensation Update ... 192
Create Employee Document ... 193
Separation or Archive ... 194
Restore from Archive ... 196
3 Transactions ... 196
Asset Inventory ... 197
Issue Assets to Employee ... 197
New Asset Invoice ... 198

Saved Asset Invoice ... 199
Attendance Management ... 200
Leave Stock ... 201
Record Leave ... 202
Recalculate Balances ... 203
Training and Development ... 204
Schedule Classes ... 204
Enroll Trainees ... 205
Training Evaluation Log ... 206
Training Attendance Monitoring ... 207
4 Maintenance Record ... 208
General ... 209
Skills ... 210
License ... 211
Religions ... 212
ID Types ... 213
Eye Colour ... 214
Complexion ... 215
Blood Types ... 216
Relationships ... 217
Ethinic Origins ... 218
Workers Union ... 219
Job Status ... 220
Employee Types ... 221
Courtesy Titles ... 222
Separation Reasons ... 223
Contract Types ... 224
Company Setup ... 225
Regions ... 227
Countries ... 227
Locations ... 228
Branches ... 229
Departments ... 230
Department Sections ... 231
Team ... 232
Job Titles ... 233
Job Roles ... 234
Staff Requirements ... 235
Job Category ... 236
Job Tier ... 237
Job Tier Ranks ... 238
Employee ID Templates ... 239
Salary Payments ... 240
Administrative ... 242
Training ... 242
Trainers ... 243
Training Programs ... 244
Training Classes ... 245
Training Grades ... 246
Training Class status ... 247
Training Types ... 248
Training Evaluation Type ... 249
New Hire Checklist ... 250
Separation Checklist ... 251

© 2014 Enter your company name

Accounting **253**
Payment Cycles 253
Payment Modes 254
Payment Types 255
Pay Wage Type 256
Pay Schedule 257
Pay Modification Reasons 258
Deduction Types 259
Banks 260
Bank Branches 261
Location Setup **262**
Parishes 263
Districts 264
Communities 265
Asset Inventory **266**
Disposable Assets 267
Fixed Assets 268
Categories 269
Units of Measure 270
Colours 271
Sizes 272
Frequencies 273
Brands/Makes 274
Brand Models 275
Suppliers 276
Issue/Return Reasons 277
Qualifications **278**
Learning Institutions 279
Categories 280
Disciplines 281
Levels 282
Attendance **284**
Leave Types 284
Leave Increments 286
Holidays 288
Holiday Types 288
Leave Reasons 289
Leave Recommendations 290
5 Reports **291**
SMART Report Custom Wizard **292**
Attendance Reports **292**
Employee Leave Balance 293
Employee Leave Balance Query 293
Leave Application 293
Leave Application Roster 293
Leave Summary Sheet 293
Leave Transaction Log 293
Disposable Assets Report **293**
Inventory Reorder Levels 294
Inventory Stock Balances 294
Issue By Location 294
Issue per Inventory Item 294
Items Issued to Employee 294
Staff Reports **294**

© 2014 Enter your company name

Attrition List by Department ... 295
Attrition List by Gender ... 295
Attrition List by Location ... 295
Attrition Summary by Gender ... 295
Attrition Summary by Location ... 295
Employee Document Checklist ... 295
Employee /staff listing by Location ... 295
Employee /staff listing by Name ... 295
Leave by Department ... 296
Staff Compensation Package ... 296
Staff Complement by Category ... 296
Staff Complement by Department ... 296
Staff Complement by Employee Type ... 296
Staff Complement by Location ... 296
Staff TRN/NIS Listing ... 296
Training Reports ... 296
Training Participation by Class ... 296
Training Participation by Department ... 297

Part V Reference & Support 298

Index 299

© 2014 Enter your company name

Foreword

This is just another title page
placed between table of contents
and topics

© 2014 Enter your company name

1 Introduction

SMART Staff Manager is a complete and comprehensive personnel management tool boasting functionality for the local environment that are superior to the three leading HR modules offered by Oracle's People Soft, ACCPAC and Microsoft Dynamics Great Plains. Our Human Resource software is the most current product available locally of its kind. It is design with new thinking and employs new practices in HR Management viewing employees as "Assets" thus allowing you to

monitor your investment in the employee by means of a cost benefit analysis. This product operates on a wide area network and its transactional nature allows the Human Resources Director(s) to monitor and approve changes in staff data so that they are aware of the modifications being done. This is also a critical security measure as employee demographics is sensitive data that should be protected from arbitrary alteration.

The Main modules of the HRM software include:

• Welfare & Supervisory Organization Charts Mapping • Applicant Recruitment (Includes on the spot interview evaluations) • Letters & Documents (Letters, Job Descriptions) • Employee Management (Extensive demographics) • Licenses & Renewals (Reminders of expiration & renewals) • Compensation & Benefits (HR now informs payroll) • Performance Evaluations • Biometric security. Gain access by fingerprint. • Web based module for employee requests and approvals.	• Multi Branches, Locations, Countries and Regions • Health and Life Benefits including other allowances • Asset Management (e.g. Uniforms & Equipment) • Incidents and Complaints (corrective action) • Leave (Auto update of balances and renewals) • Commendations & Awards (Reward employees for performance) • Staff Training Scheduling, Enrolling and Monitoring • Transactional (Approval is required before changes are confirmed) • Violations & Warning Notices • And many other useful features.

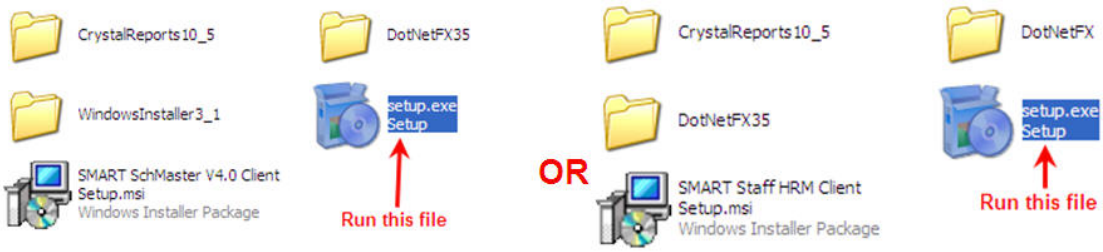
© 2014 Enter your company name

2 Basic Working Procedures

2.1 Installing Software

<u>HOW TO INSTALL SMART TECHNOLOGIES SOFTWARE</u>

1. On the data drive, CD or share server directory, run the client setup file shown below for either SMART Staff Manager or SMART SMARTStaffManager applications.



1. Click NEXT until the installation is completed.

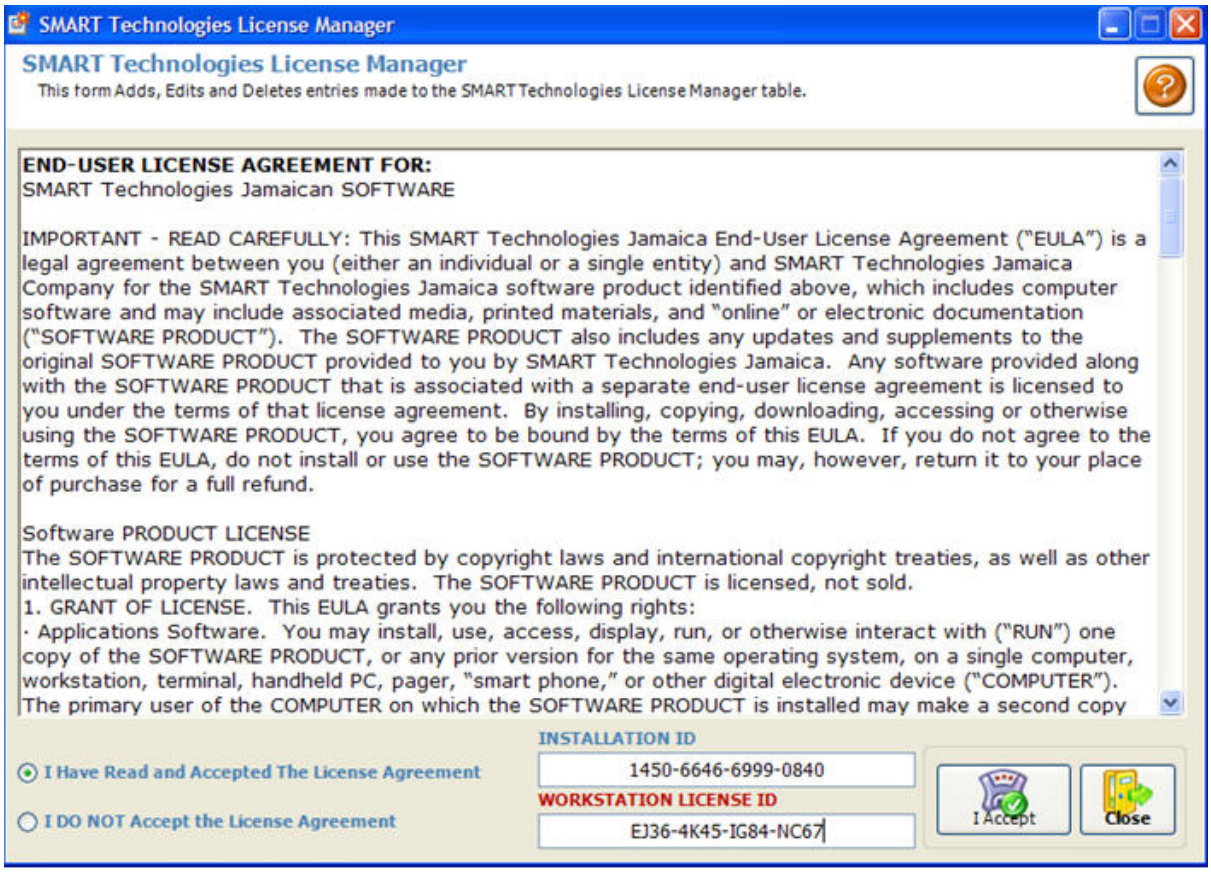
   Note: Ignore any dll registration errors that may occur.

3. Run application from DESKTOP or start menu option under All Programs > SMART Software

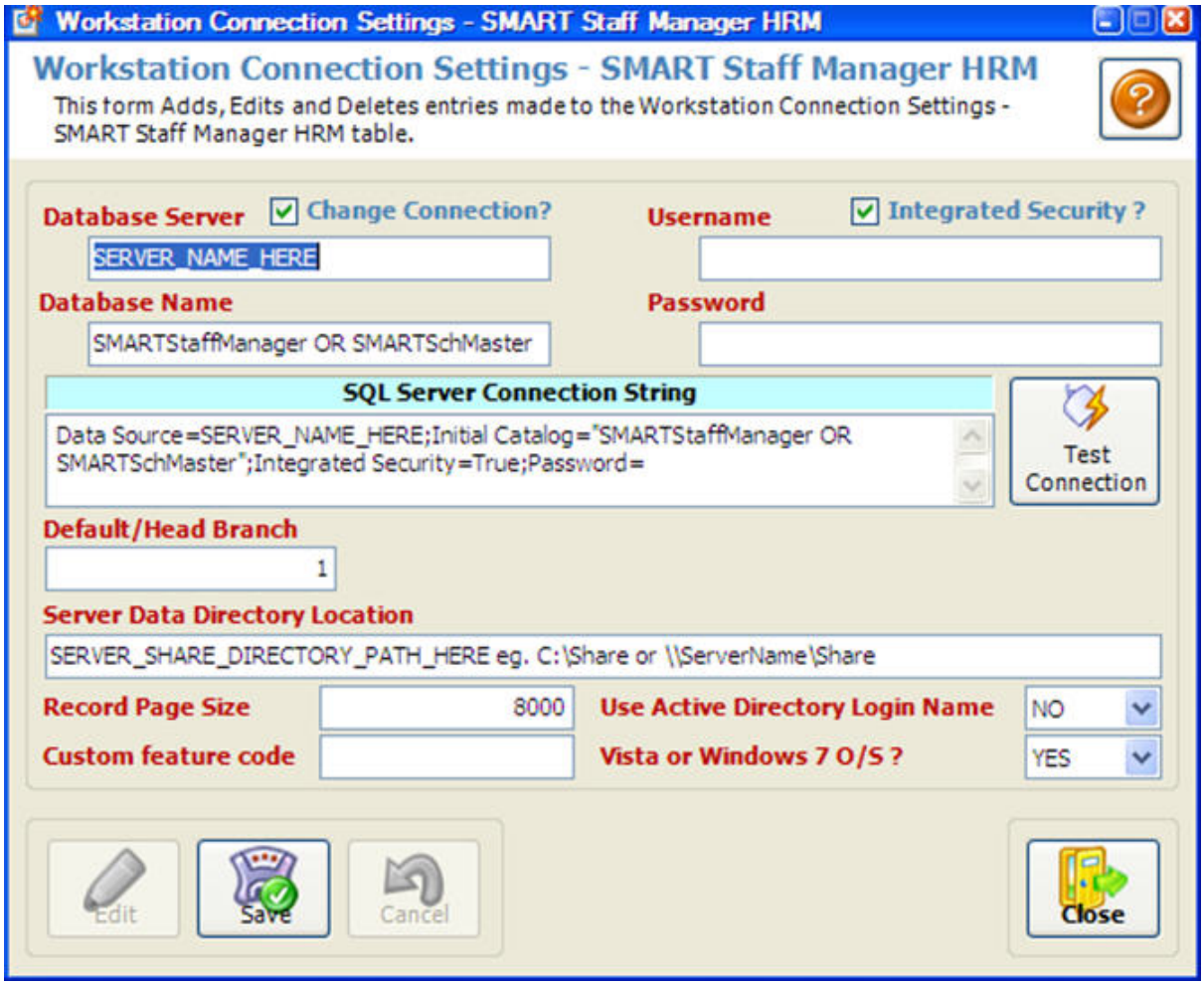
4. Enter license information. You can get a license key on the following web page: http://www.smarttechjm.com/support.htm. Request a license code by entering the details required. The **AUTH. CODE is ST2000**

Note: If you are experiencing difficulty with obtaining a code, please contact SMART Technologies at 1-876-754-9863 or email info@smarttechjm.com with the 16 digit installation ID number. You will be then given a license code. This is required for each computer the software is being installed on

© 2014 Enter your company name



5. Then configure database access.



Note: without a username or password, windows active directory authentication is being used. Therefore users must have access to the database individually or placed within a user group designated by the system administrator to gain access.

This is typically configured under the SECURITY >> LOGINS section of Microsoft SQL Server Enterprise Manager where user or group is given access privileges to either the ***SMARTStaffManager*** *or* ***SMARTSchMaster*** *databases.*

Each software (SMART Staff HRM or SMART SMARTStaffManager Time Management) has a separated share directory. Eg.
SMART Staff: \\ServerName\SMARTTechShare\DATA\SMARTStaffManager
SMARTStaffManager: \\ServerName\SMARTTechShare\DATA\SMARTSchMaster

Note: You can log into a previous installation and go to the File Menu > Configuration to get the configuration settings used for your server.

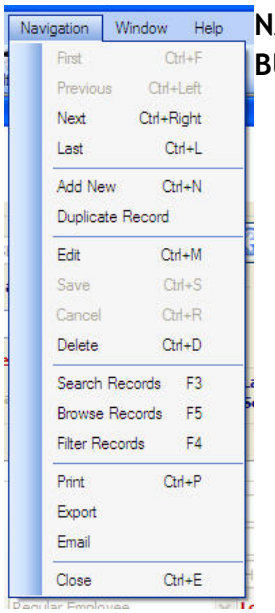
6. You can TEST CONNECTION and if successful then Save and exit. Reopen the

application and the login screen should appear.

2.2 Getting Started

2.2.1 Navigation & Data entry operations toolbar_2

The Navigation toolbar and Menu contains functions for record navigation, record management, searching and printing to a printer, export file or email. See below for details of click on option for quick reference.



NAVIGATION BUTTONS
- o First
- o Previous
- o Next
- o Last

DATA ENTRY OPERATIONS
- o Add New
- o Duplicate
- o Edit
- o Save
- o Cancel
- o Delete
- o Cut, Copy & Paste

SEARCH OPTIONS
- o Page Size
- o Search
- o Browse
- o Filter

PRINTING
- o Print
- o Export
- o Email

NAVIGATION BUTTONS

These buttons are used to navigate records on a data entry screen.

First : First navigates to the first record in the full record (or filtered) list.
Previous : Previous navigates to one record previous to the current record on screen (like a back button). Current record -1
Next : Next navigates to one record next to the current record on screen (like a forward button). Current record +1
Last : Last navigates to the last record in the full record (or filtered) list.

CUT, COPY AND PASTE

The cut, copy and paste buttons works similar to the operations in the Windows

© 2014 Enter your company name

operating system.

PAGE SIZE

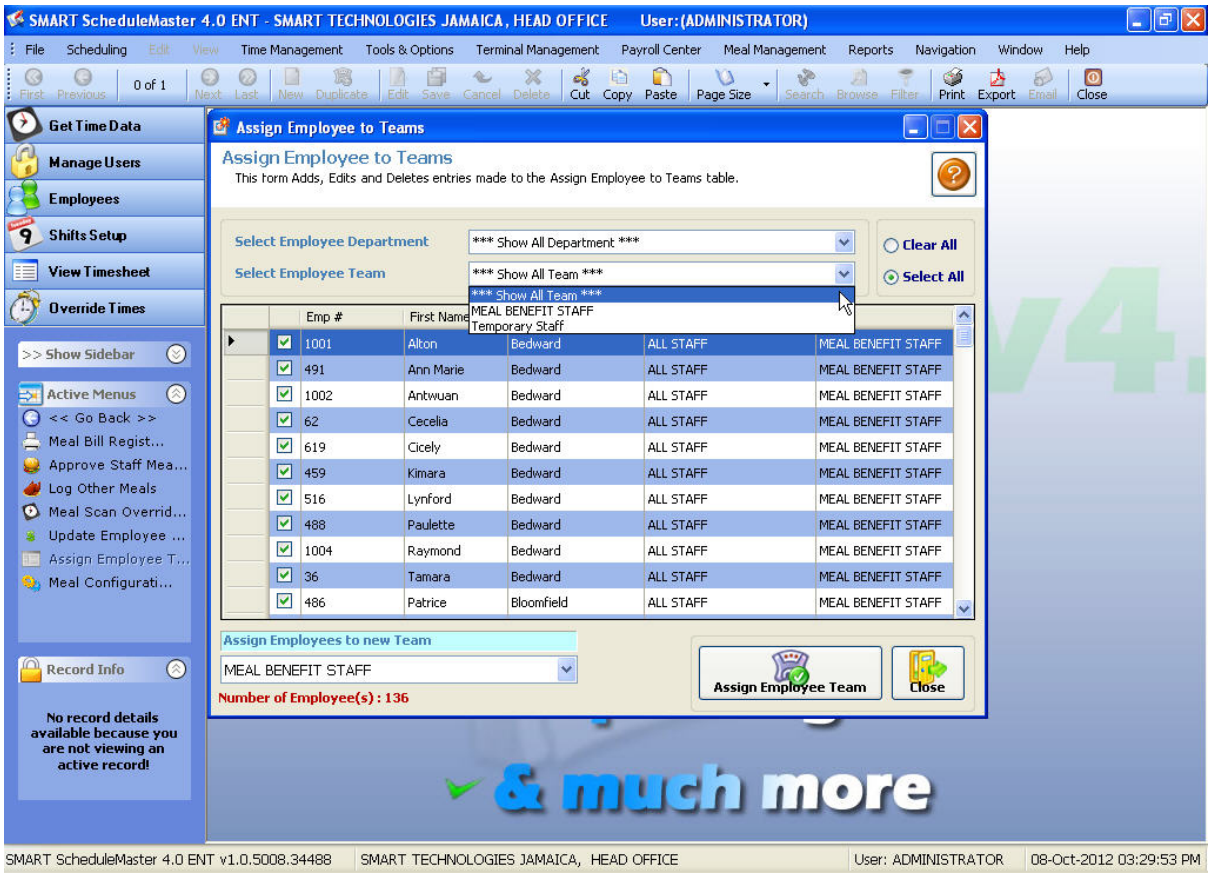
Page Size determines the maximum number of records that are retrieved from the database at any one time. This is an efficiency tool to improve performance. Eg. Opening the employee screen if set to maximum page size may pull up to 32,000 at once which may delay the application. Further, the user still have to browse, search or filter that list of find the desired record. Setting the page size to an optimal number or a low number will ensure all screens are opened promptly then the specified search will only return the desired records and not the entire record list.

Each user can set their desired page for data retrieval and it will apply to all data entry screens within the application.

HOW TO REFRESH DROP DOWN LISTS

When working in a particular screen, sometimes users will need to add/create new options within their drop down boxes. Here is an image of a screen prior to adding the new option in the drop down box:

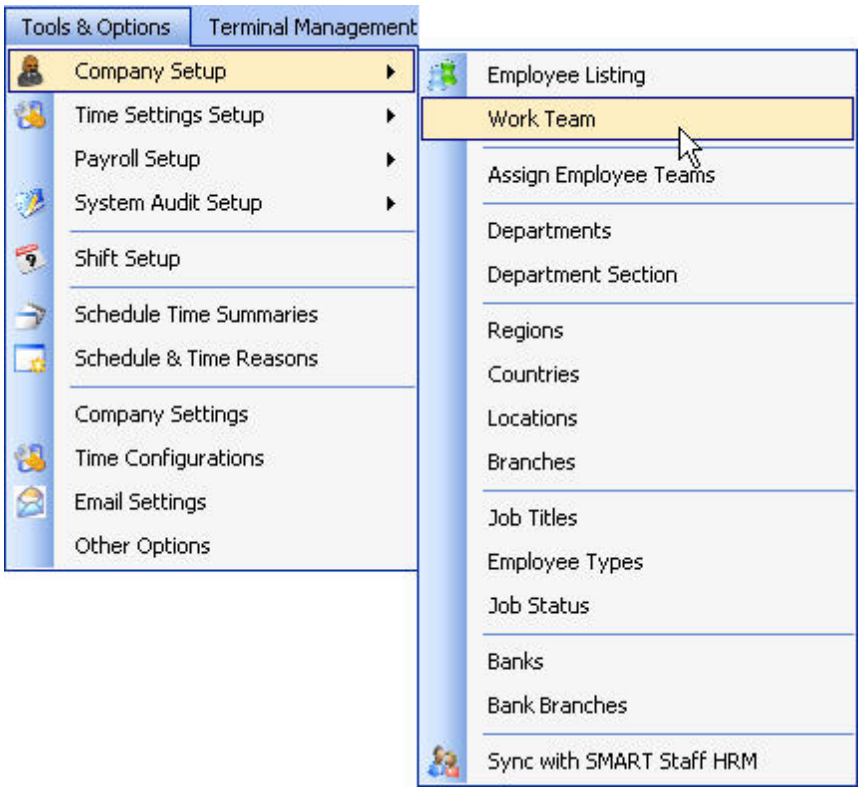
© 2014 Enter your company name



The process of adding options to a drop down box is carried out mostly in your Maintenance Menu. The user can simply minimize the current screen and open the relevant screen in the Maintenance Menu. They then proceed to add the relevant information for the drop down box and save. Once saved, they can return to the minimized screen and Refresh the list by right clicking on the drop down box and selecting Refresh List. The following screen shots detail the process:

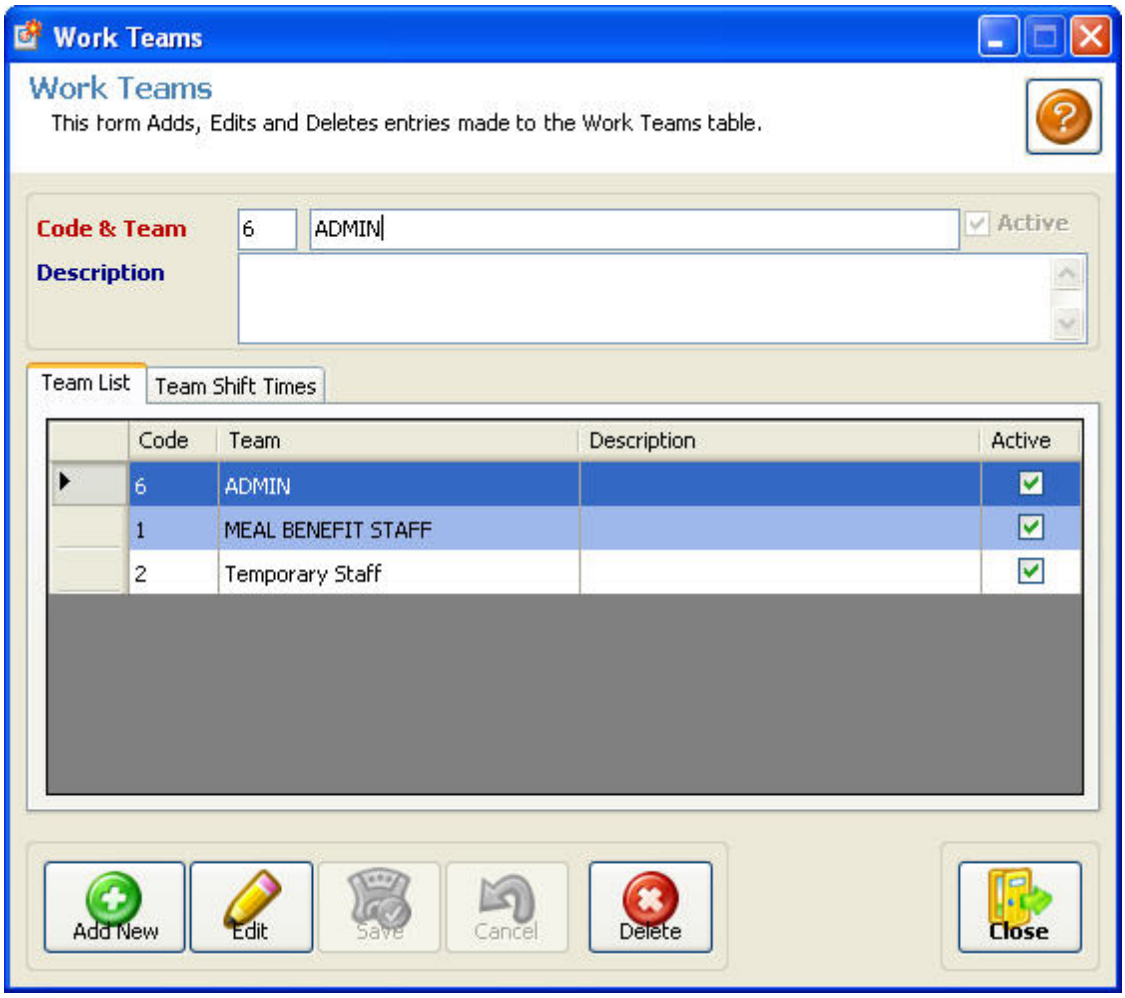
E.g. Adding A Work Team.

Step 1 - Minimize your current screen, then open the Work Team option in Company Setup under the Tools & Options Menu

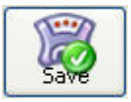


Step 2 - Click the ADD NEW button

Step 3 - Input the Code and Team Name

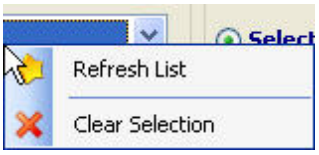


Step 4 - Save the Information

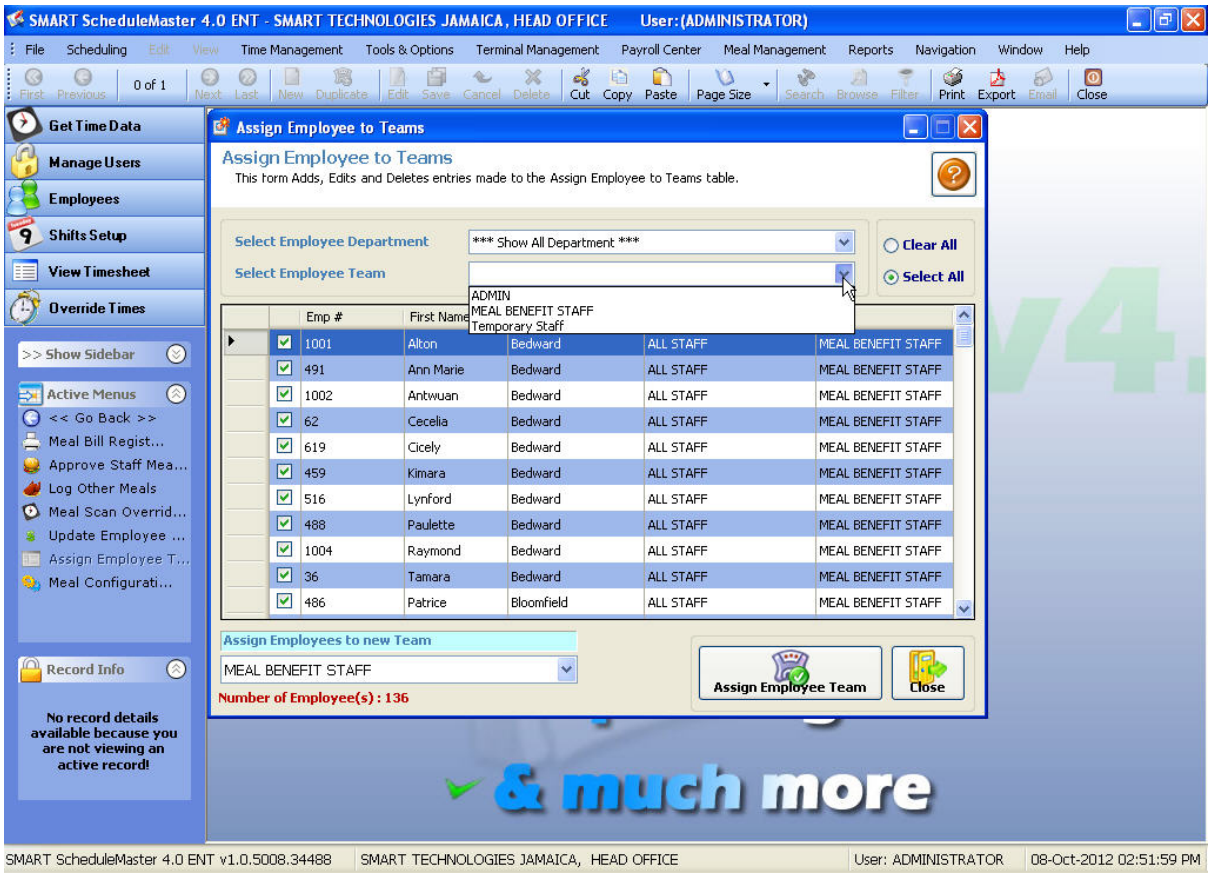


Step 5 - Return to the minimized screen and right click on the drop-down box

Step 6 - Click on Refresh List



The updated information will now appear:



2.2.2 HOW TO ADD EDIT OR DELETE RECORDS

In using the SMARTSchedule Master, you are given the flexibility to Add, Edit and Delete information as required. Adding new records to SMART SMARTStaffManager is very simple, simply press the Add New button on the data entry screen and fill out the mandatory fields that are labeled in red. Press the save button when complete. Additionally, before editing or deleting information in SMART SMARTStaffManager, you should be able to retrieve the particular record from the database using the Browse, Search or Filter options

How To add data use the Add Function
How To edit or correct information in any function use Edit Function
How To remove invalid or incorrect information use Delete Function
How To exit use the Close Function

2.2.2.1 Browsing, Searching and Filtering records

Being able to quickly browse and find records is critical and will allow for speedy editing of data.

These buttons are located on the toolbar and is available when a data entry screen is opened. SMART SMARTStaffManager allows for you to locate records by:

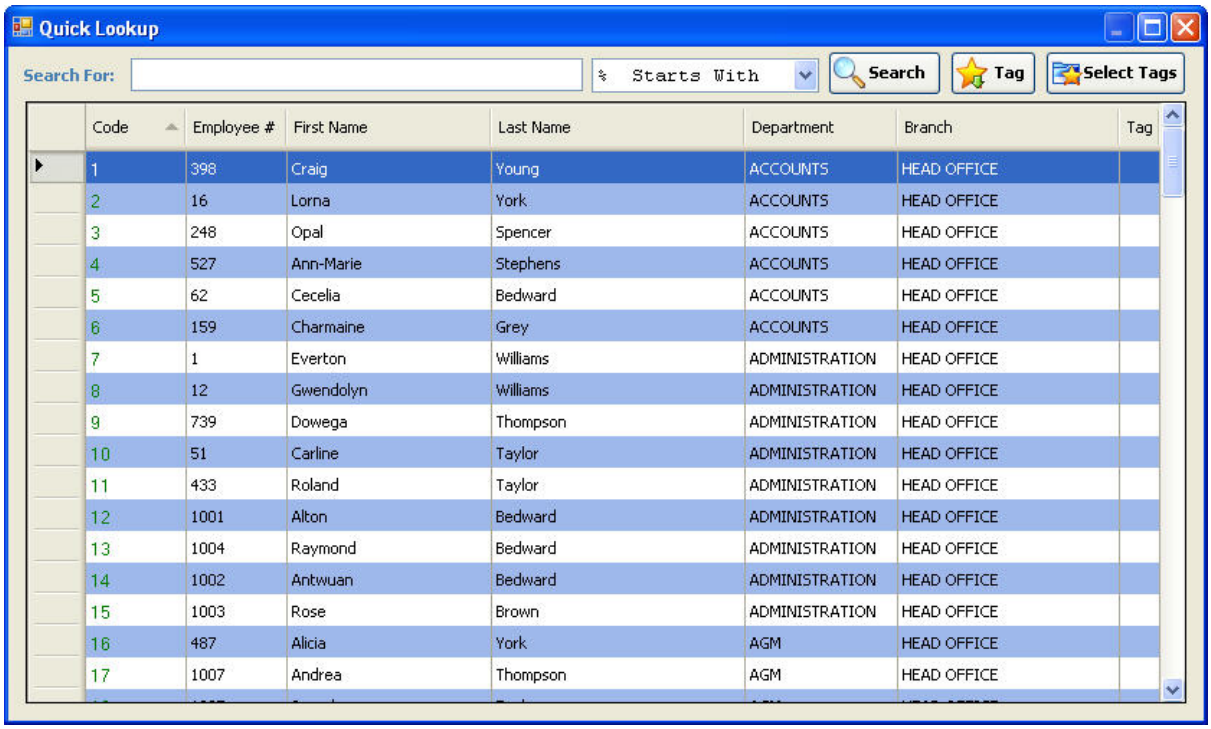
1. Browsing a list of records -
2. Searching for individual records by using a keyword
3. Filtering records list to narrow data search

How to: Browse, Search or Filter records.

2.2.2.1.1 Brow sing for records

Use the Browse button on the navigation toolbar to conduct a general search

A detailed list will appear on the screen (sample below is from the Employees Tab), and you will be prompted to enter the information you are searching for



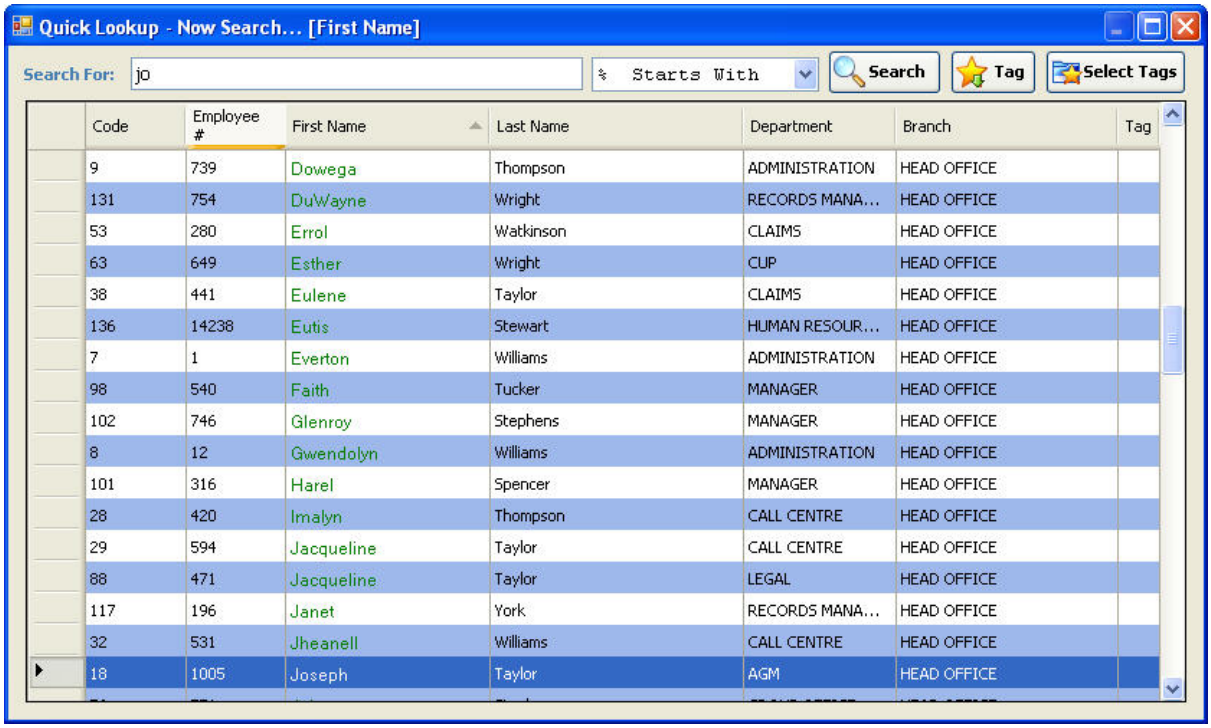
Code	Employee #	First Name	Last Name	Department	Branch	Tag
1	398	Craig	Young	ACCOUNTS	HEAD OFFICE	
2	16	Lorna	York	ACCOUNTS	HEAD OFFICE	
3	248	Opal	Spencer	ACCOUNTS	HEAD OFFICE	
4	527	Ann-Marie	Stephens	ACCOUNTS	HEAD OFFICE	
5	62	Cecelia	Bedward	ACCOUNTS	HEAD OFFICE	
6	159	Charmaine	Grey	ACCOUNTS	HEAD OFFICE	
7	1	Everton	Williams	ADMINISTRATION	HEAD OFFICE	
8	12	Gwendolyn	Williams	ADMINISTRATION	HEAD OFFICE	
9	739	Dowega	Thompson	ADMINISTRATION	HEAD OFFICE	
10	51	Carline	Taylor	ADMINISTRATION	HEAD OFFICE	
11	433	Roland	Taylor	ADMINISTRATION	HEAD OFFICE	
12	1001	Alton	Bedward	ADMINISTRATION	HEAD OFFICE	
13	1004	Raymond	Bedward	ADMINISTRATION	HEAD OFFICE	
14	1002	Antwuan	Bedward	ADMINISTRATION	HEAD OFFICE	
15	1003	Rose	Brown	ADMINISTRATION	HEAD OFFICE	
16	487	Alicia	York	AGM	HEAD OFFICE	
17	1007	Andrea	Thompson	AGM	HEAD OFFICE	

Use the column headers to sort the list in your choice of order; e.g. First name or Last name or Department, etc.

© 2014 Enter your company name

Code	Employee #	First Name	Last Name	Department	Branch	Tag
16	487	Alicia	York	AGM	HEAD OFFICE	
69	651	Alieshia	Williams	CUSTOMER SERV...	HEAD OFFICE	
12	1001	Alton	Bedward	ADMINISTRATION	HEAD OFFICE	
93	378	Alvin	Williams	MANAGEMENT IN...	HEAD OFFICE	
135	766	Andre	Spencer	HUMAN RESOUR...	HEAD OFFICE	
17	1007	Andrea	Thompson	AGM	HEAD OFFICE	
94	715	Andre-Paul	Wright	MANAGEMENT IN...	HEAD OFFICE	
125	717	Aniquea	Smith	RECORDS MANA...	HEAD OFFICE	
39	450	Ann Marie	Taylor	CLAIMS	HEAD OFFICE	
46	491	Ann Marie	Bedward	CLAIMS	HEAD OFFICE	
108	254	AnnMarie	Wright	MOTOR	HEAD OFFICE	
4	527	Ann-Marie	Stephens	ACCOUNTS	HEAD OFFICE	
35	7	Ann-Marie	Williams	CLAIMS	HEAD OFFICE	
26	124	Antoinette	Thompson	CALL CENTRE	HEAD OFFICE	
14	1002	Antwuan	Bedward	ADMINISTRATION	HEAD OFFICE	
119	683	Asheka	Tucker	RECORDS MANA...	HEAD OFFICE	
55	539	Audrey	York	CREDIT	HEAD OFFICE	

In the "search for" section above the list, type the first few letters of the employee's first name that you are searching for



Code	Employee #	First Name	Last Name	Department	Branch	Tag
9	739	Dowega	Thompson	ADMINISTRATION	HEAD OFFICE	
131	754	DuWayne	Wright	RECORDS MANA...	HEAD OFFICE	
53	280	Errol	Watkinson	CLAIMS	HEAD OFFICE	
63	649	Esther	Wright	CUP	HEAD OFFICE	
38	441	Eulene	Taylor	CLAIMS	HEAD OFFICE	
136	14238	Eutis	Stewart	HUMAN RESOUR...	HEAD OFFICE	
7	1	Everton	Williams	ADMINISTRATION	HEAD OFFICE	
98	540	Faith	Tucker	MANAGER	HEAD OFFICE	
102	746	Glenroy	Stephens	MANAGER	HEAD OFFICE	
8	12	Gwendolyn	Williams	ADMINISTRATION	HEAD OFFICE	
101	316	Harel	Spencer	MANAGER	HEAD OFFICE	
28	420	Imalyn	Thompson	CALL CENTRE	HEAD OFFICE	
29	594	Jacqueline	Taylor	CALL CENTRE	HEAD OFFICE	
88	471	Jacqueline	Taylor	LEGAL	HEAD OFFICE	
117	196	Janet	York	RECORDS MANA...	HEAD OFFICE	
32	531	Jheanell	Williams	CALL CENTRE	HEAD OFFICE	
18	1005	Joseph	Taylor	AGM	HEAD OFFICE	

The name first matched name with your search will be highlighted. You may use the

scroll keys on the keyboard or the scroll bar located to the right of the screen to navigate further. Once you have highlighted the row you wish to select you may double click or press enter to access the the row of information. From here you may add, edit or delete information.

Match By Options

The "Match By" options allow you to be flexible with your search. Example:

= Is Equal : This will look for a direct match (not case sensitive) Eg. Adams = Adams

>= Greater & Equal : This will find all values above or equal to your search value for number and some text values.

Eg. For numbers: 10 >= 10 or 15 >= 10. For texts: Brown >= Adams (i.e B is after A in the alphabet)

> Greater Than : This will find all values above your search value for number and some text values.

Eg. For numbers: 15 > 10. For texts: Brown > Adams (i.e B is after A in the alphabet)

<= Less & Equal : This will find all values lower or equal to your search value for number and some text values.

Eg. For numbers: 10 <= 10 or 10 <= 15. For texts: Adams <= Brown (i.e A is after B in the alphabet)

<= Less : This will find all values lower than your search value for number and some text values.

Eg. For numbers: 10 < 15. For texts: Adams < Brown (i.e A is after B in the alphabet)

%% Contains : This will find all values containing your search value whether at the start, any part of or at the end of the text.

Eg. Adams contains "ad", "am" or "ms"

% Starts with : This will find all records that starts with your search value. Eg. Adams starts with "ad"

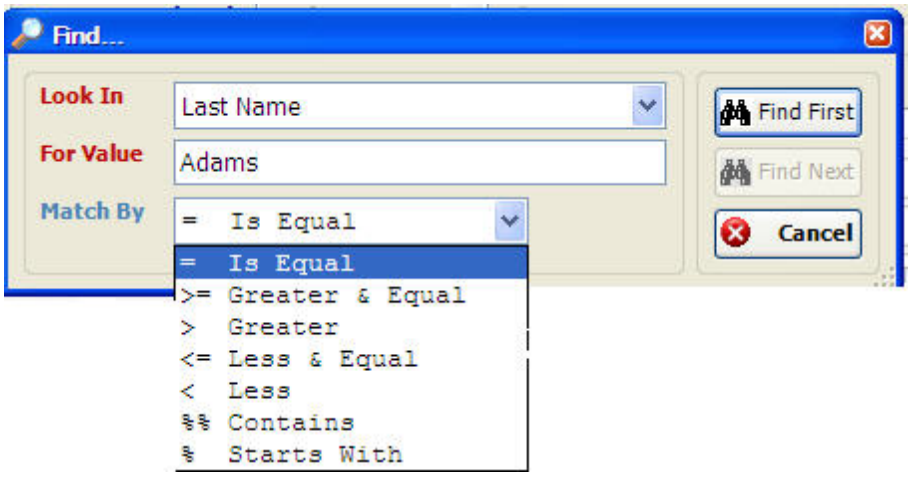
NOTE: Additional browsing and searching options can be added to each data entry screen. Click here to see how!

Related: HOW TO ADD EDIT OR DELETE INFORMATION

2.2.2.1.2 Searching for records

Use the Search button on the navigation toolbar to conduct a individual record search.

Select the search field from the box labeled "Look In" and enter your Search value.



Press the "Find First" button to locate the first record in the list according to the database index. Use the "Find Next" button to continue searching until your desired record is on screen.

Match By Options

The "Match By" options allow you to be flexible with your search. Example:

= Is Equal : This will look for a direct match (not case sensitive) Eg. Adams = Adams

>= Greater & Equal : This will find all values above or equal to your search value for number and some text values.

Eg. For numbers: 10 >= 10 or 15 >= 10. For texts: Brown >= Adams (i.e B is after A in the alphabet)

> Greater Than : This will find all values above your search value for number and some text values.

Eg. For numbers: 15 > 10. For texts: Brown > Adams (i.e B is after A in the alphabet)

<= Less & Equal : This will find all values lower or equal to your search value for number and some text values.

Eg. For numbers: 10 <= 10 or 10 <= 15. For texts: Adams <= Brown (i.e A is after B in the alphabet)

<= Less : This will find all values lower than your search value for number and some text values.

Eg. For numbers: 10 < 15. For texts: Adams < Brown (i.e A is after B in the alphabet)

%% Contains : This will find all values containing your search value whether at the start, any part of or at the end of the text.

Eg. Adams contains "ad", "am" or "ms"

% Starts with : This will find all records that starts with your search value. Eg. Adams starts with "ad"

© 2014 Enter your company name

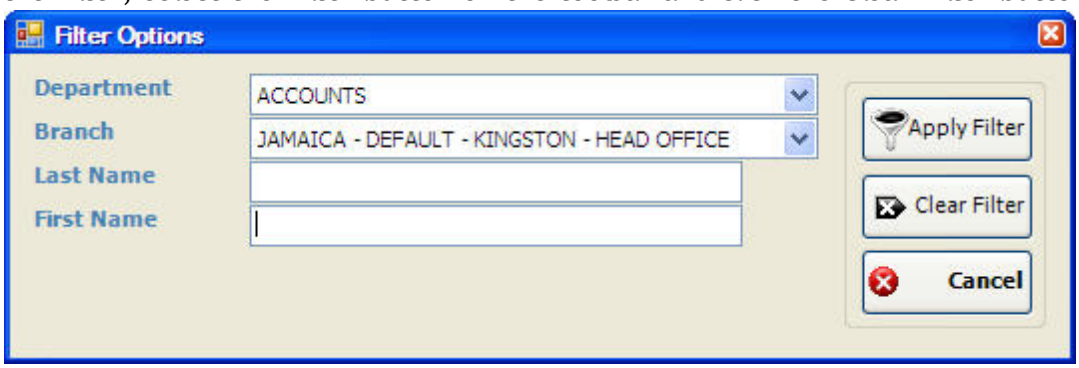
NOTE: Additional browsing and searching options can be added to each data entry screen. Click here to see how!

Related: HOW TO ADD EDIT OR DELETE INFORMATION

2.2.2.1.3 Filtering records

Use the Filter button on the navigation toolbar to limit the record list to only those records matching the filter values.

Select your desired filter options and click the apply filter button. Only those records matching your selection will be shown on the data entry screen you are filtering. To clear the filter, select the Filter button on the toolbar and click the Clear Filter button.



NOTE: Additional filter options can be added to each data entry screen. Click here to see how!

2.2.2.2 Add & Duplicate Function

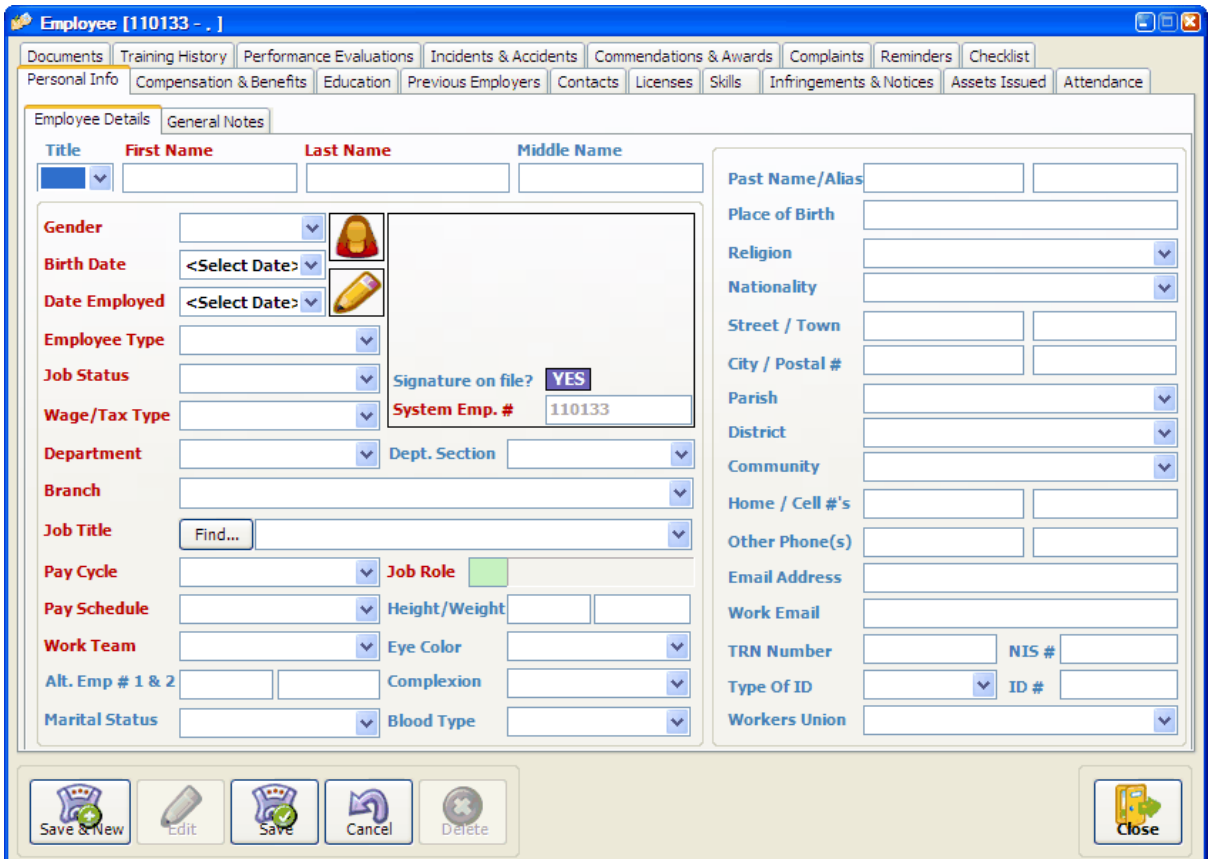
<u>The Add New Button</u>

Adding a new button operates consistently throughout the SMART SMARTStaffManager application.

When a new record entry is required, always look out for this button "Add New". Left mouse click on this button to clear the screen and allow you to enter the values for the new item.

Note: Fill out all items labeled RED, the others are optional.

© 2014 Enter your company name



Example: Adding a new "Employee" in SMART SMARTStaffManager.

To add a new Employee you first left mouse click the "Add New" button. Enter the employee name and other required information labeled in red then left mouse click either on the "Save & New " button if you want to save the current record and add another employee after, or just click "Save " button if you're only creating a single record; and you're done. Left mouse click the " Close " button to exit the window.

The Duplicate Button

The duplicate button works similar to the Add New except it does not clear a blank screen for data entry. Instead, this button will make a duplicate copy of an existing record and place it on screen for modification then saving. This feature is particularly handy when entering multiple records with similar information. Eg. Employees of the same location and department (only name and employee number would be different).

Reminder: When duplicating records, always remember to make the necessary changes before saving!

Related Topics

Edit

Save

© 2014 Enter your company name

Save & New
Cancel
Delete
Close

2.2.2.3 Edit Function

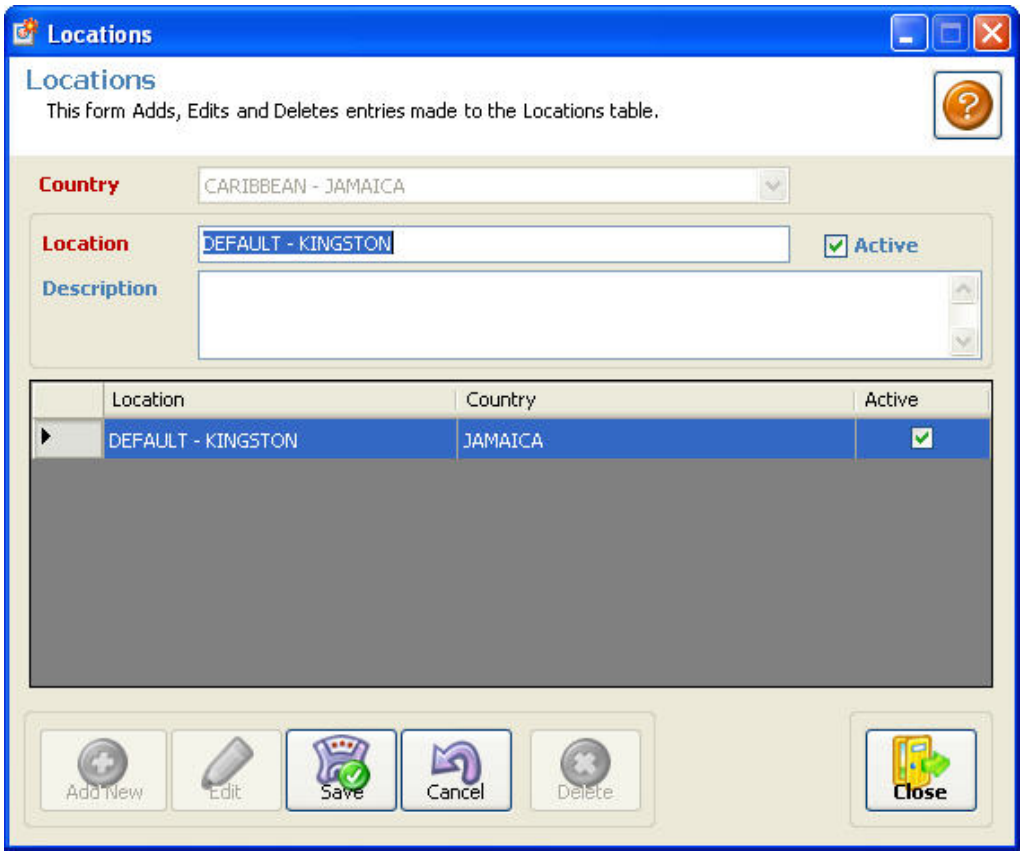
Editing is carried out in a consistent manner within the SMART SMARTStaffManager application.

First find the particular record from the database using the Browse, Search or Filter options. Then left mouse click the "Edit" button to allow the values of existing data to become enabled and editable. Make your adjustments then save when done.

Note: Fill out all items labeled RED, the others are optional.

Example: Editing a "Location" in SMART Schedule Master.
To edit any existing Location, first find the particular record from the database using the Browse, Search or Filter options.

© 2014 Enter your company name



Once selected left mouse click on the "Edit" button and start editing the name of the Location in the "Location" field. Hit the " Save " button to finalize your update.

Related Topics

Add

Save

Save & New

Cancel

Delete

Close

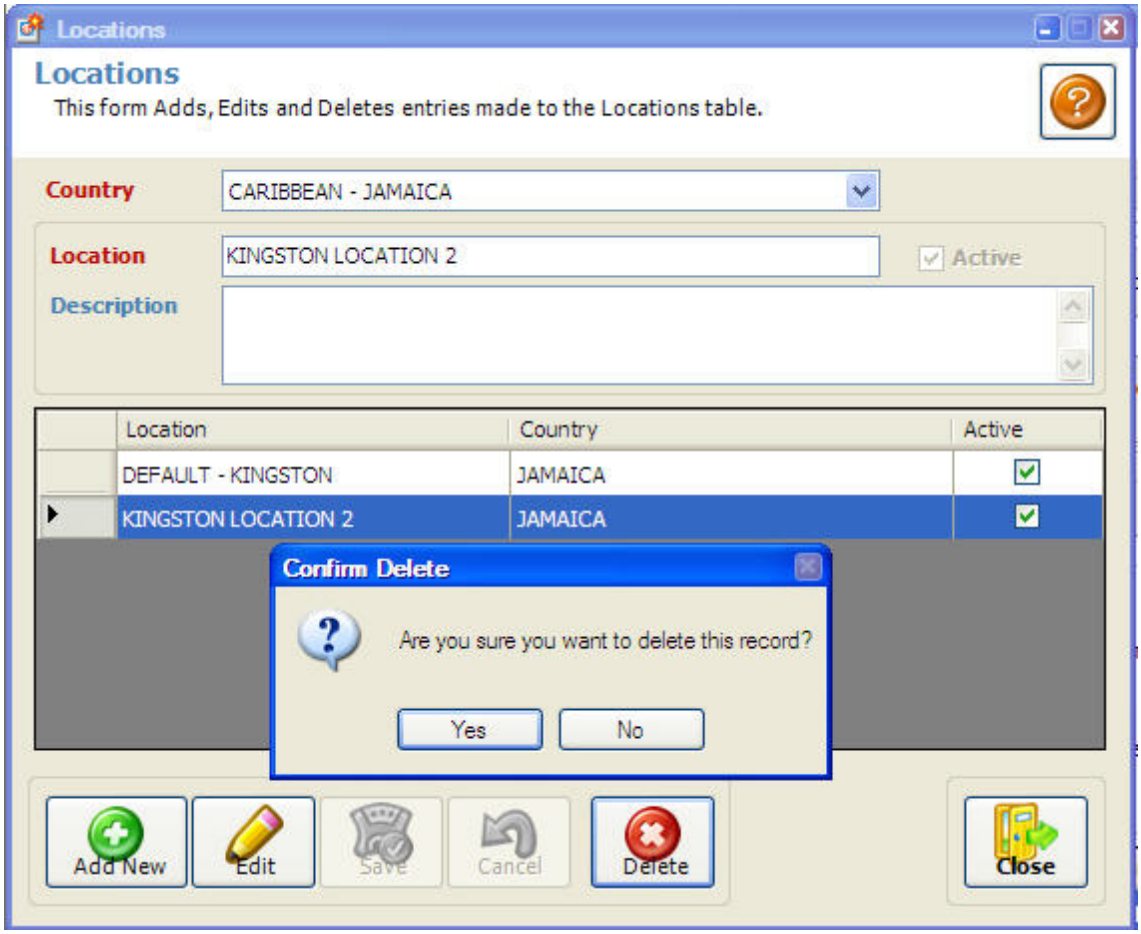
2.2.2.4 Delete Function

Deleting a record is carried out in a consistent manner within the SMART SMARTStaffManager application.

First find the particular record from the database using the Browse, Search or Filter options. Left mouse click the "Delete" to initiate the process of deleting the currently selected and displayed record. A confirmation dialog will immediately appear asking you to confirm removal of the selected record. Once confirmed, the affected record is permanently removed.

NOTE: Deleted records can only be retrieved by the database administrator if the Audit module is enabled or a backup or transaction log is available!

Example: Deleting a "Location" in SMART SMARTStaffManager.
To delete a Location, first find the particular record from the database using the Browse, Search or Filter options.



To ensure that the Location is selected. Once selected left mouse click on the "Delete" button. A confirmation window will appear, click "Yes" if you want to confirm deleting the Location, and "No" to cancel.

© 2014 Enter your company name

Related Topics

Add

Edit

Save

Save & New

Cancel

Close

2.2.2.5 Save Function

Saving new or edited data is carried out in a consistent manner within the SMART SMARTStaffManager application.

After entering a new record or editing an existing record, use the "Save" button to commit the new or edited information into the system. Clicking on the save option will commit the new information and keep the screen open thereby allowing you to continue to work without re-opening the screen.

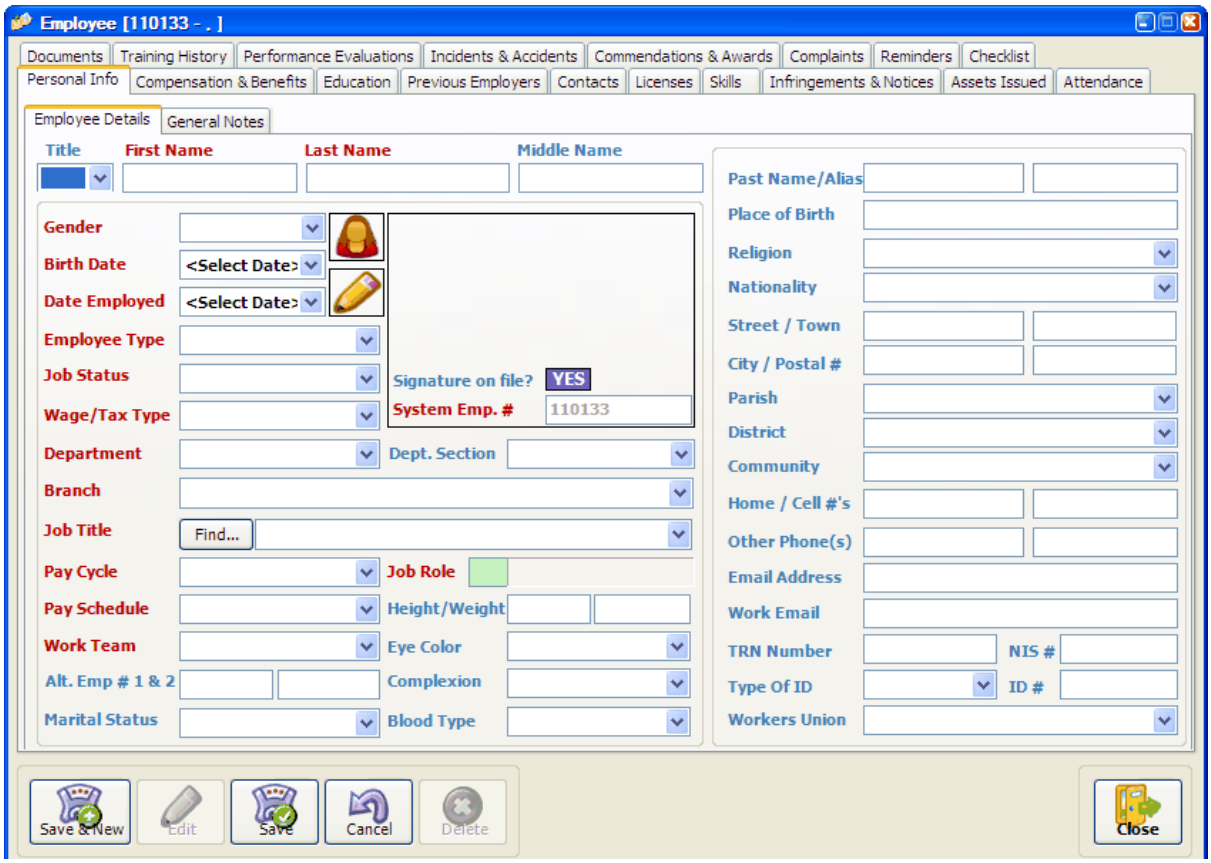
Related Topics
Add
Edit
Save & New
Cancel
Delete

2.2.2.6 Save & New Function

Save & New is equivalent to manually left mouse clicking the "Save" button to commit record, and then left mouse clicking "Add" button for the insertion of new record. We've made easy for you by combining this common work flow into one click; the "Save & New" button.

After entering a new record, use the "Save & New" button to commit the new information into the system and clear the screen in preparation for the entry of another new record.

Clicking on the save & New option will commit the new information and create a new blank screen thereby allowing you to begin work on a new item in the same section of the program without re-opening the screen.



Related Topics

Add

Edit

Save

Cancel

Delete

2.2.2.7 Cancel Function

The "Cancel" button can be used to stop any action executed prior to saving it. This button can only be used when the Add New or Edit options have been executed prior.

Related Topics

© 2014 Enter your company name

Add
Edit
Save
Save & New
Delete
Close

2.2.2.8 Close Function

The "Close" button will exit any window or dialog that it is displayed on. This button is located on data entry screens, the Navigation toolbar and the Navigation Menu. Should you have new data displayed in the window you will be prompted to save before the screen is closed. The user may also cancel the close screen operation and continue working.

Related Topics
Add
Edit
Save
Save & New
Cancel
Delete

2.3 Setting Up Users & Security

SMART SMARTStaffManager SECURITY SETUP

STEP 1: SETTING UP TEAMS

Go to the menu **Tools & Options >> Company Setup >> Work Teams.** If the team does not exists, add it.

Example.

Operations Team (has all members of of the Operations Team as selected on their employee profile)
Operations Supervisor Team (When added under user group should have access to the Operations Team)

STEP 2: ADD USER GROUPS

Go to the menu **File >> Security Settings >> User Groups.** If the group does not exist,

© 2014 Enter your company name

add it.

Also select the **Work Teams** that this user group should have access to. This gives the supervisor of this group access to their employees

STEP 3: GROUP PERMISSIONS

Go to the menu **File >> Security Settings >> Group Permissions.** Since users maybe members of one or more groups, menu, branch and other access permission does not need to be set for each individual group. Ensure the basic security menu access groups are setup first as access rights can be compounded by adding users to one or more User Groups at the User List screen.

STEP 4: USER LISTS

Go to the menu **File >> Security Settings >> User List.** Add the employees login details. Username and login name are the same. Select the menu access group (eg. Supervisors Menus which gives access to supervisor functions) and the Team access group (eg. Maintenance Supervisor which gives access to all maintenance employees)

STEP 5: UPDATING EMPLOYEE PROFILE

Go to the menu **Employee Maintenance >> Employee Listing.**

Edit the record and place the employee on their team. Supervisors and Manager should be on a separate team. See step 1 example

NOTE: If an employee that was already setup is replaced and a new employee takes over that position the Do step 4-5 only.

2.4 Setting Up Company Profile & Employees

Before using the system, kindly ensure all the support company details are entered.

These menu options are:

1. Maintenance >> General
2. Maintenance >> Company Setup

© 2014 Enter your company name

3 Application Main Modules

The SMART Staff Manager incorporates these key features.

SECURITY. The software allows for both vertical and horizontal security access. This means you can allow restrict less to low level users or even users on the same level. Therefore only the HR Manager may be able to change overview another managers salary.

ASSETS. Manage and assign all assets from laptops to uniforms. You can also do mix-matching with uniforms so you are aware of the exact stock levels on sizes and colors.Set asset lifetime and the software will give you forecasting reports telling you when you staff will need new uniform and the sizes and colors to order.

USABILITY. Features of the software are self explanatory and a brief description on how to use the feature is displayed at the top of most screens. Fields are labeled according to the requirements, e.g. All red labeled fields are mandatory wherein a value must be entered. Other useful tool tips will appear where appropriate to inform the user if they are making mistakes or just for general information. Users may also press F1 or the help button at any time to get further details on a particular feature and its purpose.

TRANSACTIONAL. The application is transactional and requires approval of all requests submitted by data entry personnel. This creates an audit trail, allowing the administrator to audit the system when needed and track changes due to error, negligence or sabotage. Where a module is transactional, it may be turned off if this feature is not needed by your company.

INCIDENTS & COMPLAINTS. Log all incidents, accidents and complaints including confrontations, customer complaints, injury on the job and even sexual harassment. Our software goes a step further allowing you to analyze the incidents and specify corrective action so it does not reoccur. The system will track these actions until you have flagged them all as being implemented allowing your to improve the operations of your company by taking corrective action to improve the infrastructure or procedures that cause conflict or injury to employees (incidents).

BENEFITS. Setup health, life and other benefits that your company offers. Set up eligibility criteria by either Job Title, Gender or Employee Type (Probationary, Full Time, Contract etc.).

ACCESSIBILITY. If your company has franchises or branches locally, regionally or internationally, as long as there is network connectivity available or internet

© 2014 Enter your company name

access,authorized users of the application may access the software to do key tasks such as to approve leave, salary advance or other employee requests. Email notifications will be sent to each user informing of work-flow tasks to be attended to.

APPLICANTS. Interviewers may score applicants while they are being interviewed. When you hire an applicant, the system will print all letters, job description and contracts for employees separating them by Job Titles. No more editing and printing of these documents one by one.

TRAINING. Design courses and classes and enroll employees. Setup prerequisite courses that are mandatory before the employee may move on to an advance level. Log training needs where noticed either spontaneously or as a result of an evaluation.

EVALUATIONS. 3600. A comprehensive and easy to use evaluation module. This module can accommodate applicant entry exam evaluations as well as the regular periodic or end of year performance evaluations. New to this module is the ability to perform 360 degrees, empowering your company to benefit from this exercise without contracting overseas services at high costs.

REPORTS. Using the popular Crystal Reports engine,various reports are available and customizable for your specific needs. Future updates will include a data dictionary and reporting module allowing you to formulate and design your own reports.

3.1 Employee Data Managment

Employee main data in entered on the Personal Info Tab. Other related data tabs for an employee's profile includes:

1. Compensation & Benefits
    a. Job History
    b. Compensation
    c. Contract History
    d. Payments
    e. Deductions
2. Education
3. Previous Employers
4. Contacts
5. Licenses
6. Skills
7. Reminders
8. Checklist

OTHER EMPLOYEE RELATED FUNCTIONS:

© 2014 Enter your company name

1. Separate an Employee (Resignation, Dismissal or Other)
2. View Transactions submitted for approval
3. View Reminders assigned to you
4. Print Employee IDs
5. Update Job and Salary details with Job Wizard
6. Print Employee Letters
7. Restore and Inactive Employee
8. View Separated/Pass Employees

3.2 Leave Managment Module

The Leave Management module allows you to monitor employee's absence by setting up various leave types and how they are calculated. The main functions include:

1. Leave Stock - Assign Employee Leave balances
2. Record Leave - Save Leave Applications

Leave types assigned to employees and balances are shown on the Employee Profile under the Attendance tab.

However, before you can use the Leave Management module, the following setup is needed:

1. Leave Recommendations
2. Leave Reasons
3. Holiday Types
4. Holidays
5. Leave Types
6. Leave Increments

3.3 Asset Managment Module

The Asset Management module allows tracking of a full inventory of disposable and fixed assets issued to employees. The main functions include:

1. Issue Asset to Employees
2. New Asset Invoice / Receive Assets
3. Saved Asset Invoice

Assets issued to employees are shown on the Employee Profile under the Assets Issued tab.

© 2014 Enter your company name

However, before you can use the Asset Management module, the following setup is needed:

1. Categories
2. Unit of Measure
3. Colours
4. Sizes
5. Frequencies
6. Brands/Make
7. Brand Models
8. Suppliers
9. Issue/Return Reasons
10. Disposable Assets
11. Fixed Assets

3.4 Training & Development Module

The Training & Development module is used to track training programs employees have been enrolled on and also record any assessments done and absence. The main functions include:

1. Schedule Classes or Training Programs
2. Enroll Trainees / Employees
3. Evaluation Results
4. Attendance Monitoring

Training programs an employee is enrolled on are shown on the Employee Profile under the Training History tab.

However, before you can use the Training & Development module, the following setup is needed:

1. Trainers
2. Training Programs
3. Training Classes
4. Training Grades
5. Training Class Status
6. Training Types
7. Training Evaluation Types

© 2014 Enter your company name

© 2014 Enter your company name

4 Application Menus & Functions

Once successfully logged in your SMART Staff Manager home screen will display.

The main screen has a fluid layout .....

4.1 File Menu

This menu allows you to access the first basic components of the software. From here, users will be allowed initial access to the program and users with the respective functionality will be allowed to tailor he setup of the database to their company's specifications.

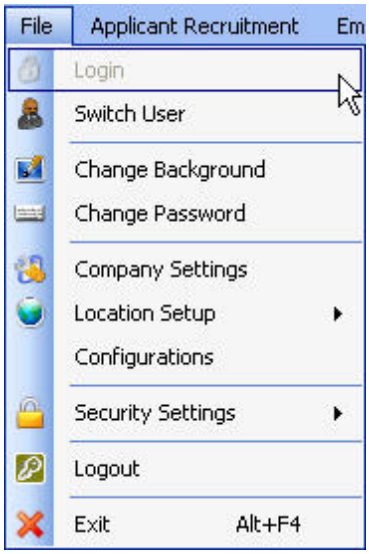
This program gives each company a wide variety of options that will allow them to put in specifics that assist in getting the exact output they are looking for.

E.g. the Location Setup option allows you to add even branch locations for each branch of the company.

Use the links below to view a detailed description of each of the options available in this

© 2014 Enter your company name

menu.



RELATED TOPICS:

LOGIN
SWITCH USER
CHANGE BACKGROUND
CHANGE PASSWORD
COMPANY SETUP
LOCATION SETUP
CONFIGURATIONS
SECURITY SETTINGS
LOGOUT
EXIT

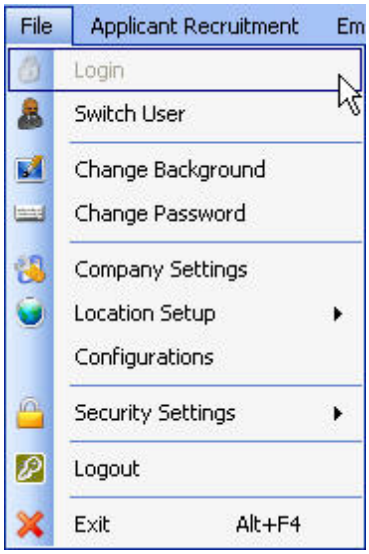
4.1.1 Login

All users would have been setup on the system with individualised login requirements. At this juncture, each user would use their unique login information to access the SMART Staff Program. Without the proper login requirements users will not be able to view information, add, delete or edit.

Only the user with the correct login information should access the system. It is not

© 2014 Enter your company name

acceptable to share passwords or login names or to use someone else's login information.



When prompted the user will be required to input their username and password.

After entering the required information the user can select the login button.

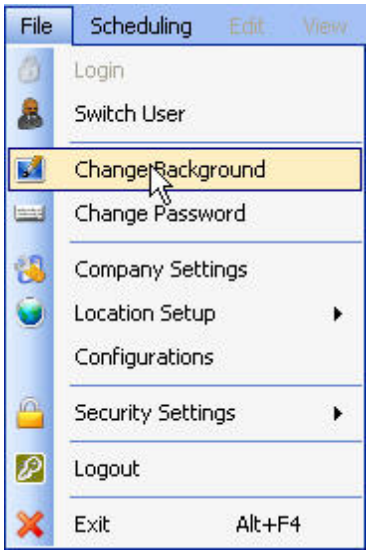
4.1.2 Switch User

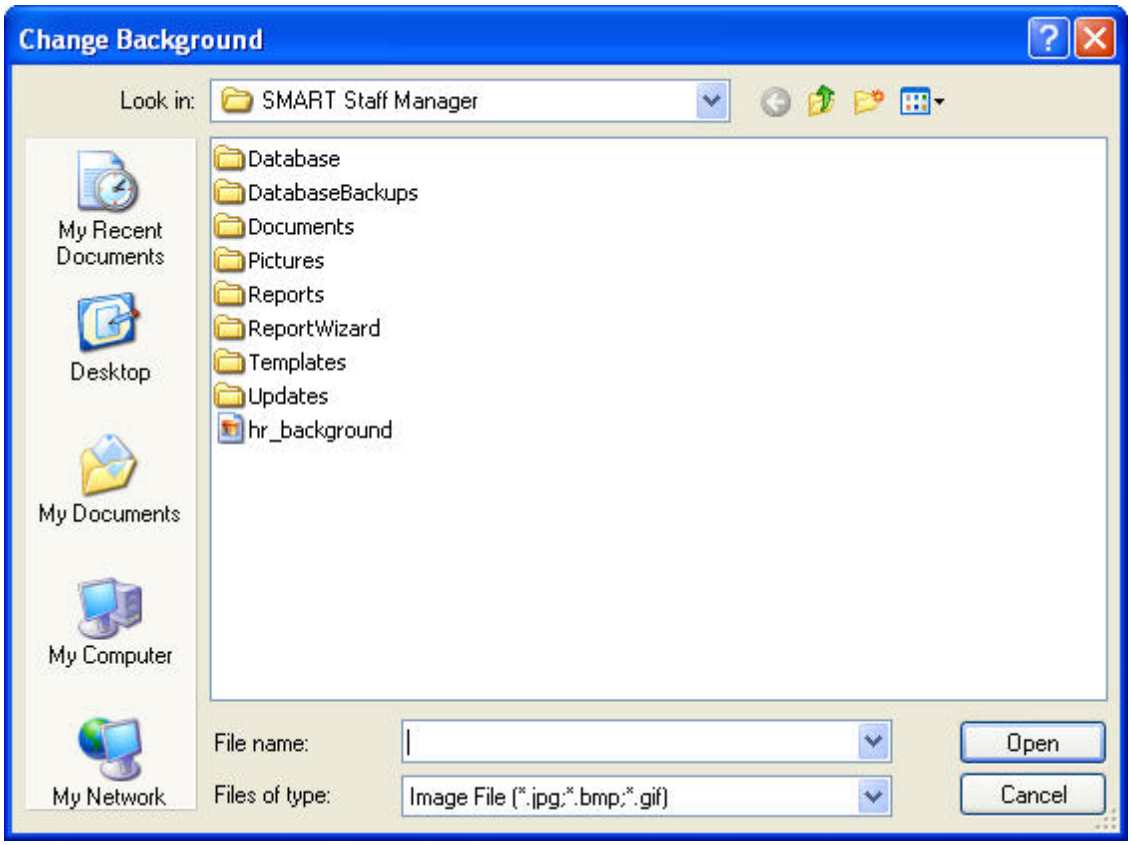
This option allows one user to safely exit and allow another user to access the program. Basically allows you to logoff and login in one click.

4.1.3 Change Background

A cosmetic feature that allows the user to select a background for the screen that will enhance their view of the information in SMART Staff.

© 2014 Enter your company name





4.1.4 Change Password

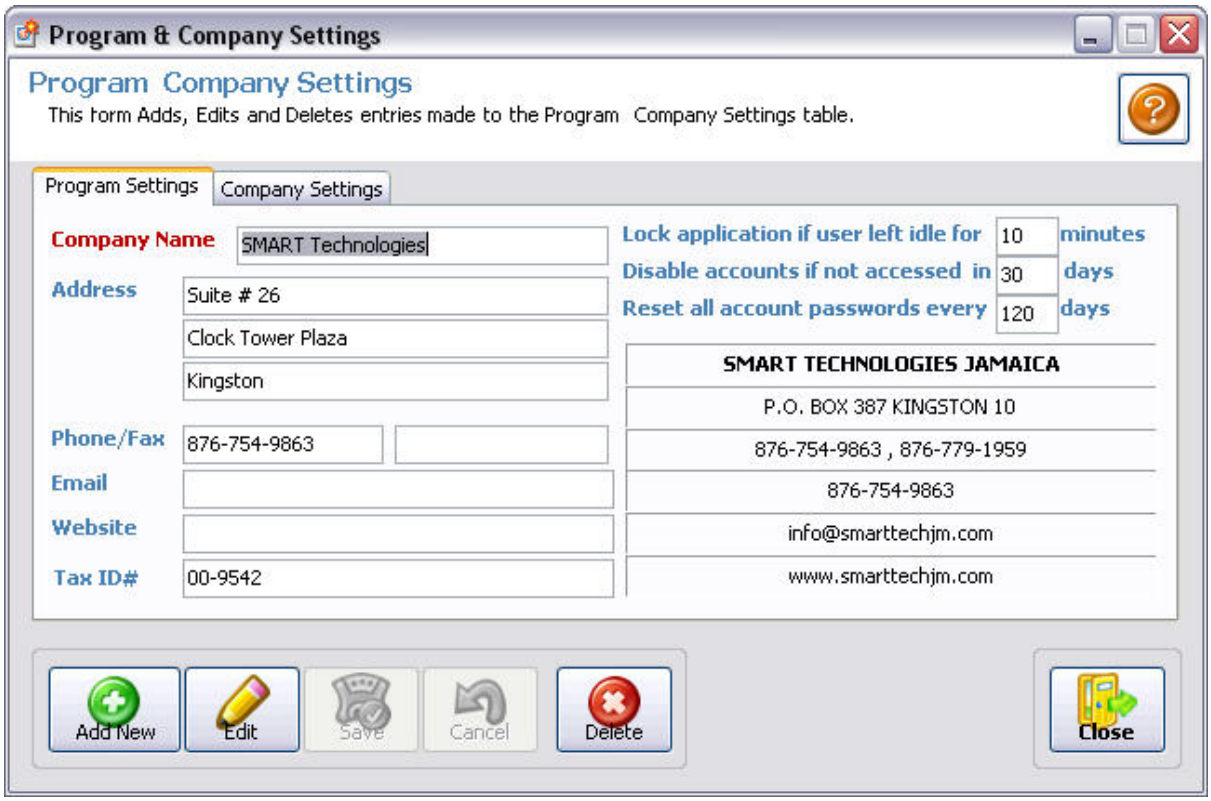
This feature allows the users to revise and change the login passwords that they would have saved on the system. This is a safety feature and allows all users to renew passwords that may have been exposed or have become compromised.

© 2014 Enter your company name

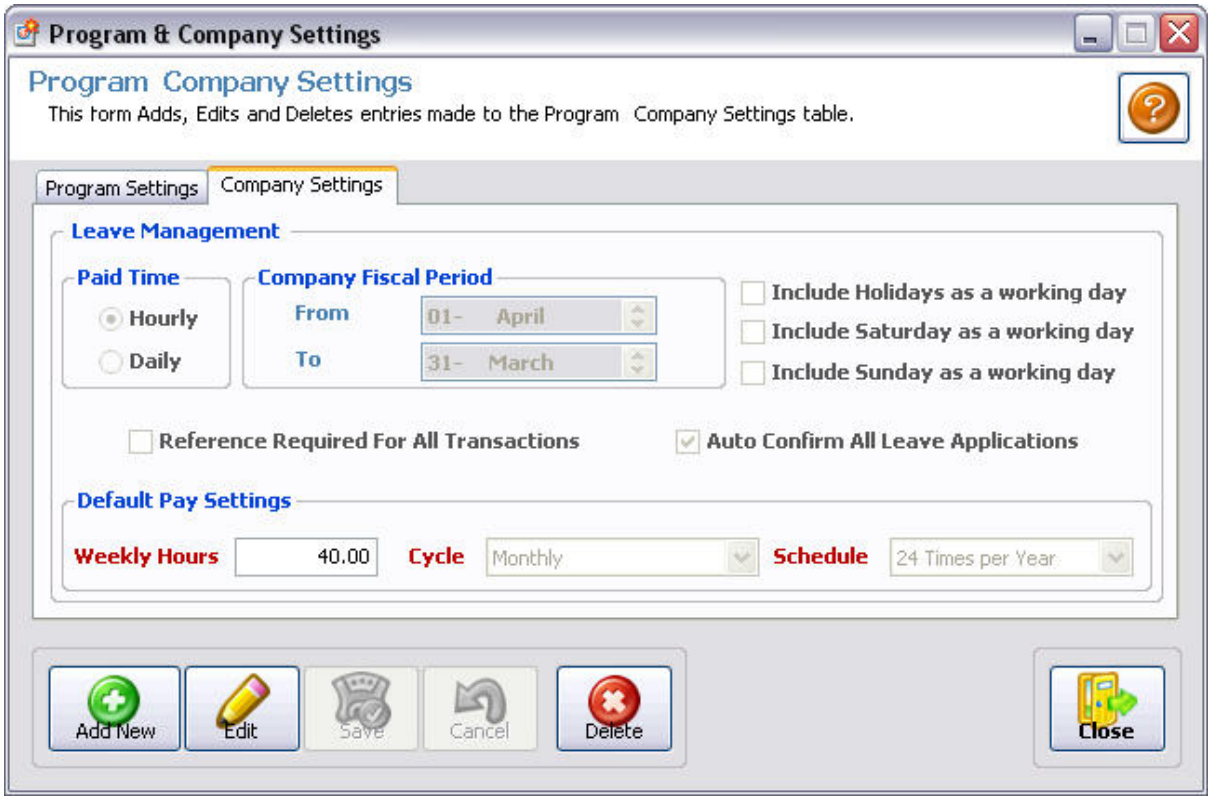
A good tool to keeping your login safe is to change your passwords on a regular basis e.g. every 15 days or 30 days.

4.1.5 Company Setup

This form allows the company's details to be entered and stored in the SMART Staff Manager's Database

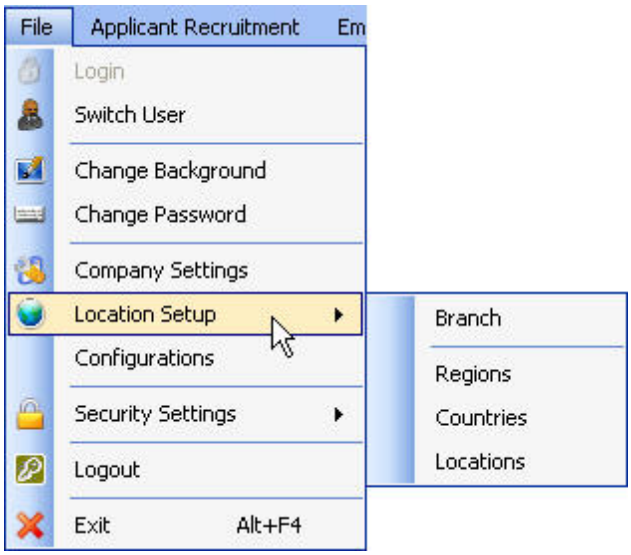


The Company settings tab contains crucial information about the standard pay period, pay cycle and the company's fiscal year start and end date.



4.1.6 Location Setup

Here the company (if sub-divided) can monitor and control each segment of the organization.



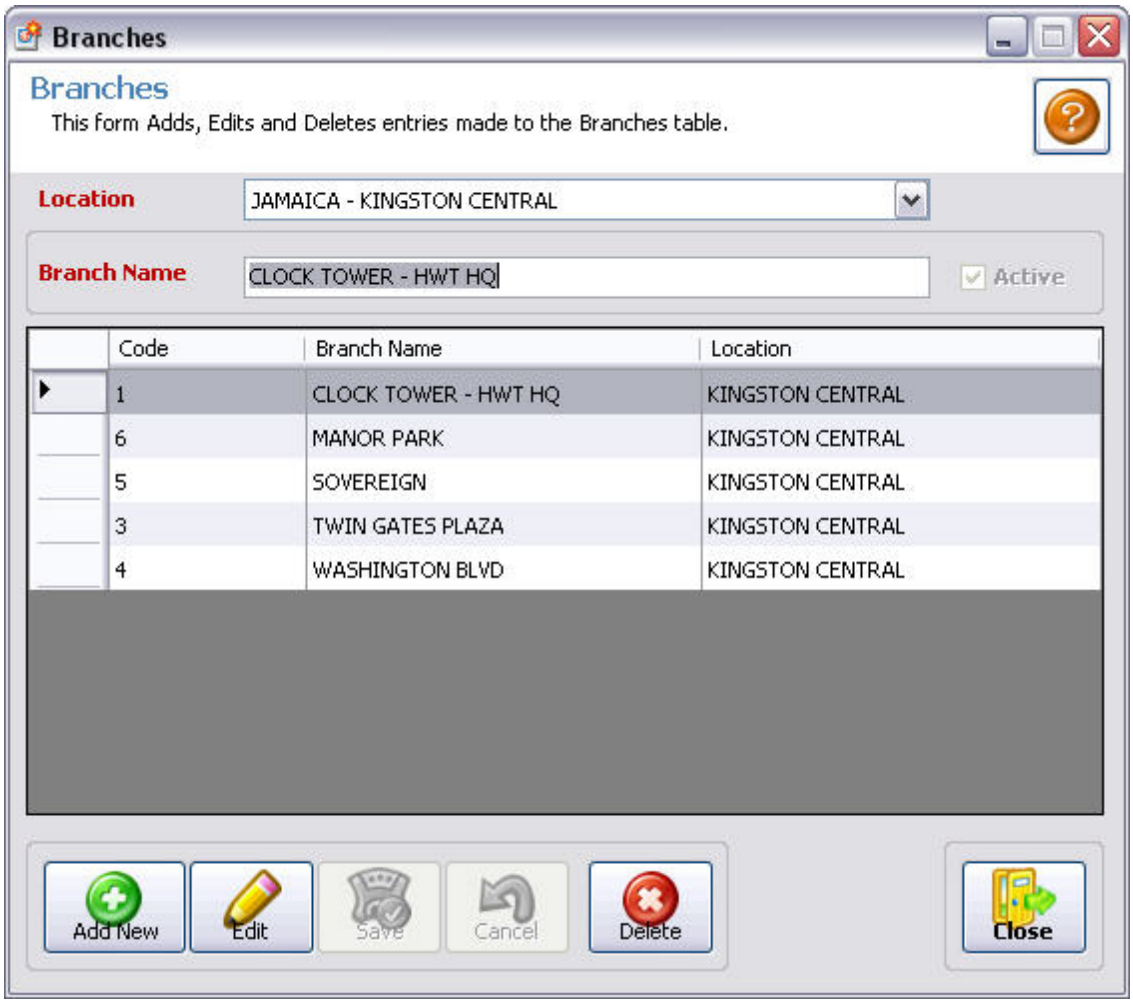
RELATED TOPICS:

BRANCH
REGION
COUNTRY
LOCATIONS

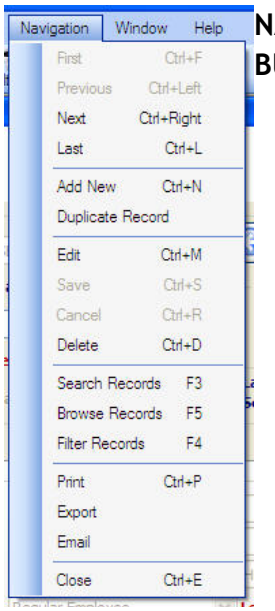
4.1.6.1 Branch

Each branch of the organization is given a unique code, a branch name and location is required. A branch can be identified as the head quarters of the organization of as active/ inactive.

© 2014 Enter your company name



The Navigation toolbar and Menu contains functions for record navigation, record management, searching and printing to a printer, export file or email. See below for details of click on option for quick reference.



NAVIGATION BUTTONS
- o First
- o Previous
- o Next
- o Last

DATA ENTRY OPERATIONS
- o Add New
- o Duplicate
- o Edit
- o Save
- o Cancel
- o Delete
- o Cut, Copy & Paste

SEARCH OPTIONS
- o Page Size
- o Search
- o Browse
- o Filter

PRINTING
- o Print
- o Export
- o Email

NAVIGATION BUTTONS

These buttons are used to navigate records on a data entry screen.

First : First navigates to the first record in the full record (or filtered) list.
Previous : Previous navigates to one record previous to the current record on screen (like a back button). Current record -1
Next : Next navigates to one record next to the current record on screen (like a forward button). Current record +1
Last : Last navigates to the last record in the full record (or filtered) list.

CUT, COPY AND PASTE

The cut, copy and paste buttons works similar to the operations in the Windows operating system.

PAGE SIZE

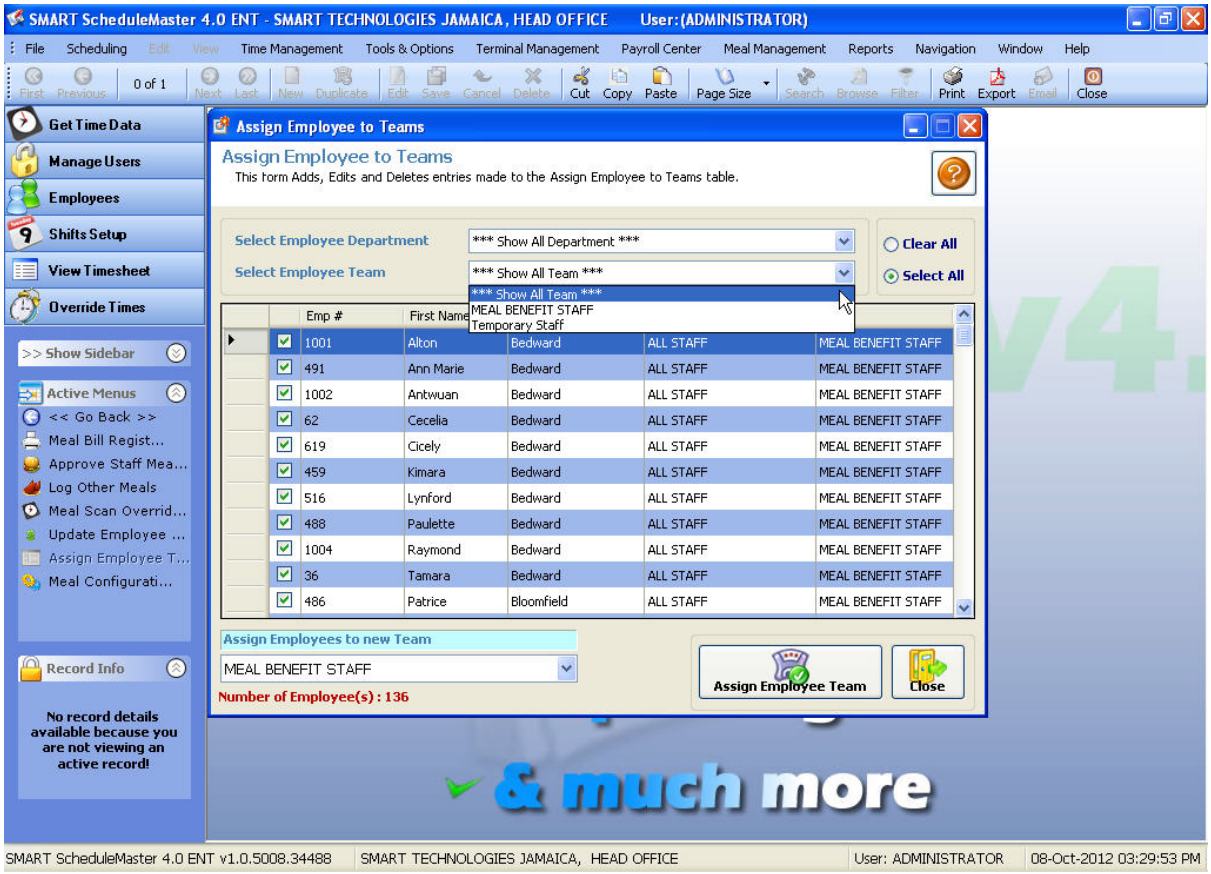
© 2014 Enter your company name

Page Size determines the maximum number of records that are retrieved from the database at any one time. This is an efficiency tool to improve performance. Eg. Opening the employee screen if set to maximum page size may pull up to 32,000 at once which may delay the application. Further, the user still have to browse, search or filter that list of find the desired record. Setting the page size to an optimal number or a low number will ensure all screens are opened promptly then the specified search will only return the desired records and not the entire record list.

Each user can set their desired page for data retrieval and it will apply to all data entry screens within the application.

HOW TO REFRESH DROP DOWN LISTS

When working in a particular screen, sometimes users will need to add/create new options within their drop down boxes. Here is an image of a screen prior to adding the new option in the drop down box:

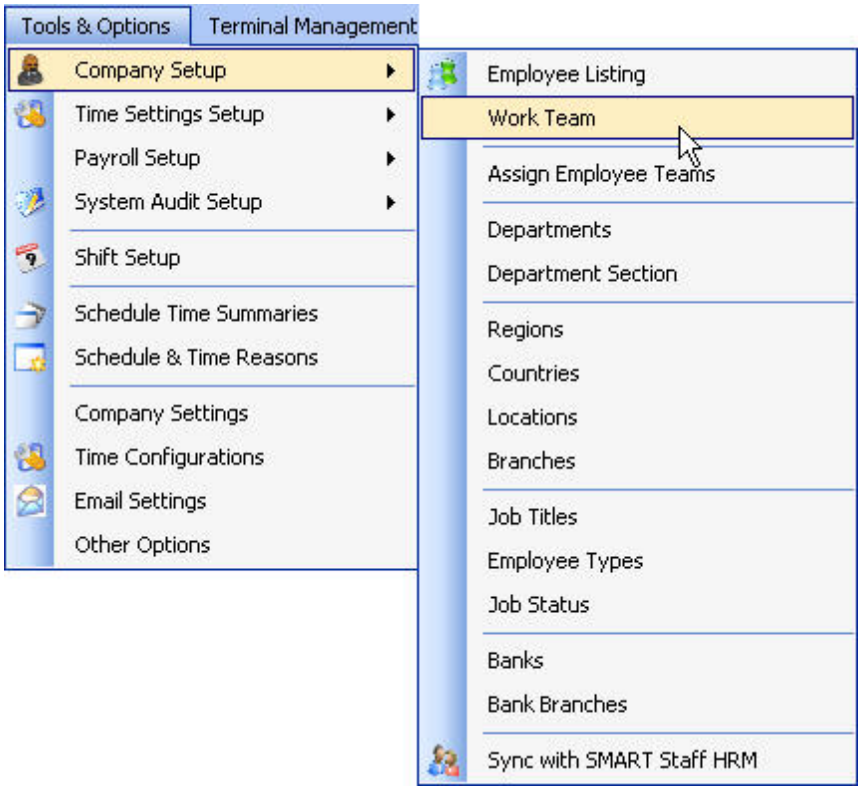


The process of adding options to a drop down box is carried out mostly in your

Maintenance Menu. The user can simply minimize the current screen and open the relevant screen in the Maintenance Menu. They then proceed to add the relevant information for the drop down box and save. Once saved, they can return to the minimized screen and Refresh the list by right clicking on the drop down box and selecting Refresh List. The following screen shots detail the process:

E.g. Adding A Work Team.

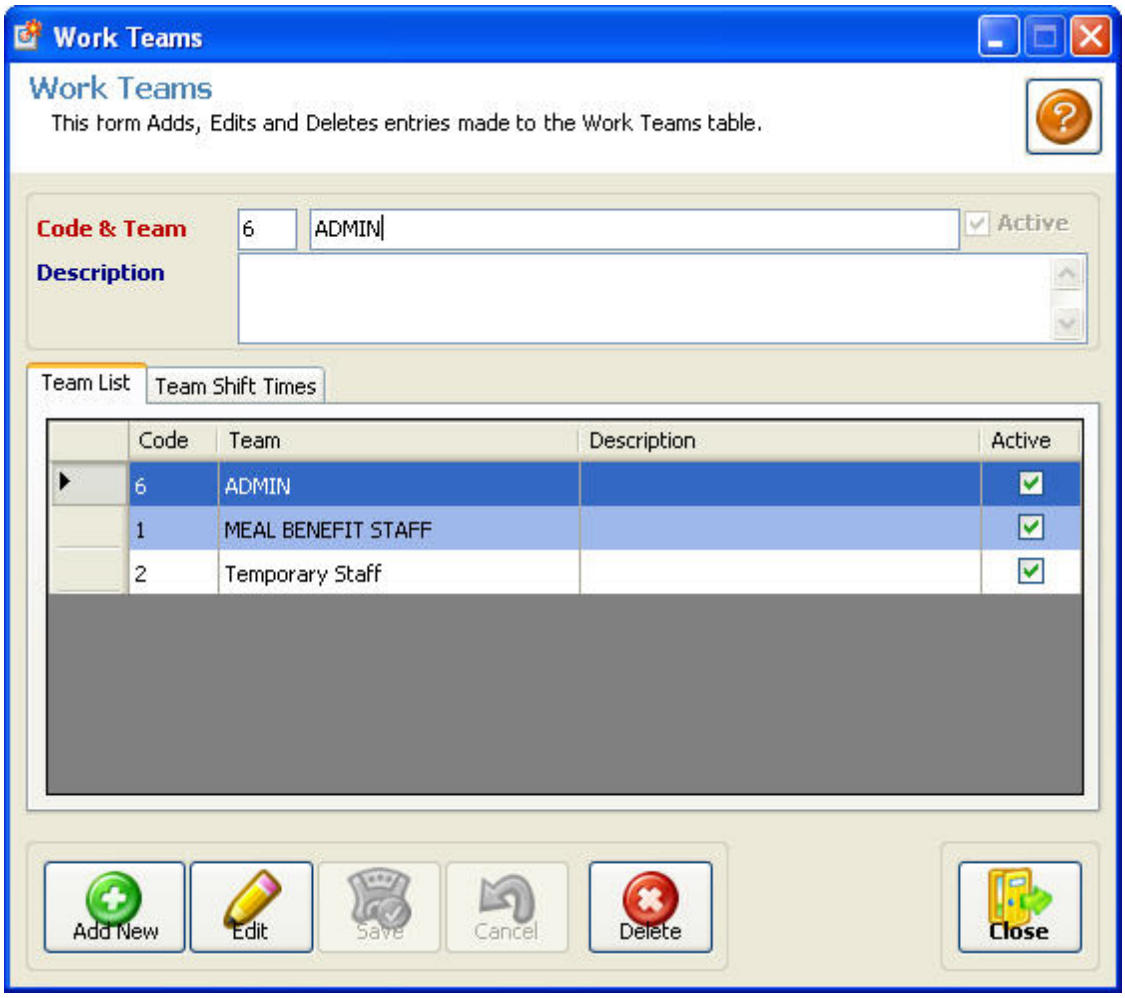
Step 1 - Minimize your current screen, then open the Work Team option in Company Setup under the Tools & Options Menu



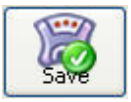
Step 2 - Click the ADD NEW button

Step 3 - Input the Code and Team Name

© 2014 Enter your company name

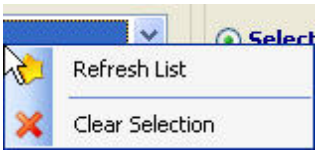


Step 4 - Save the Information

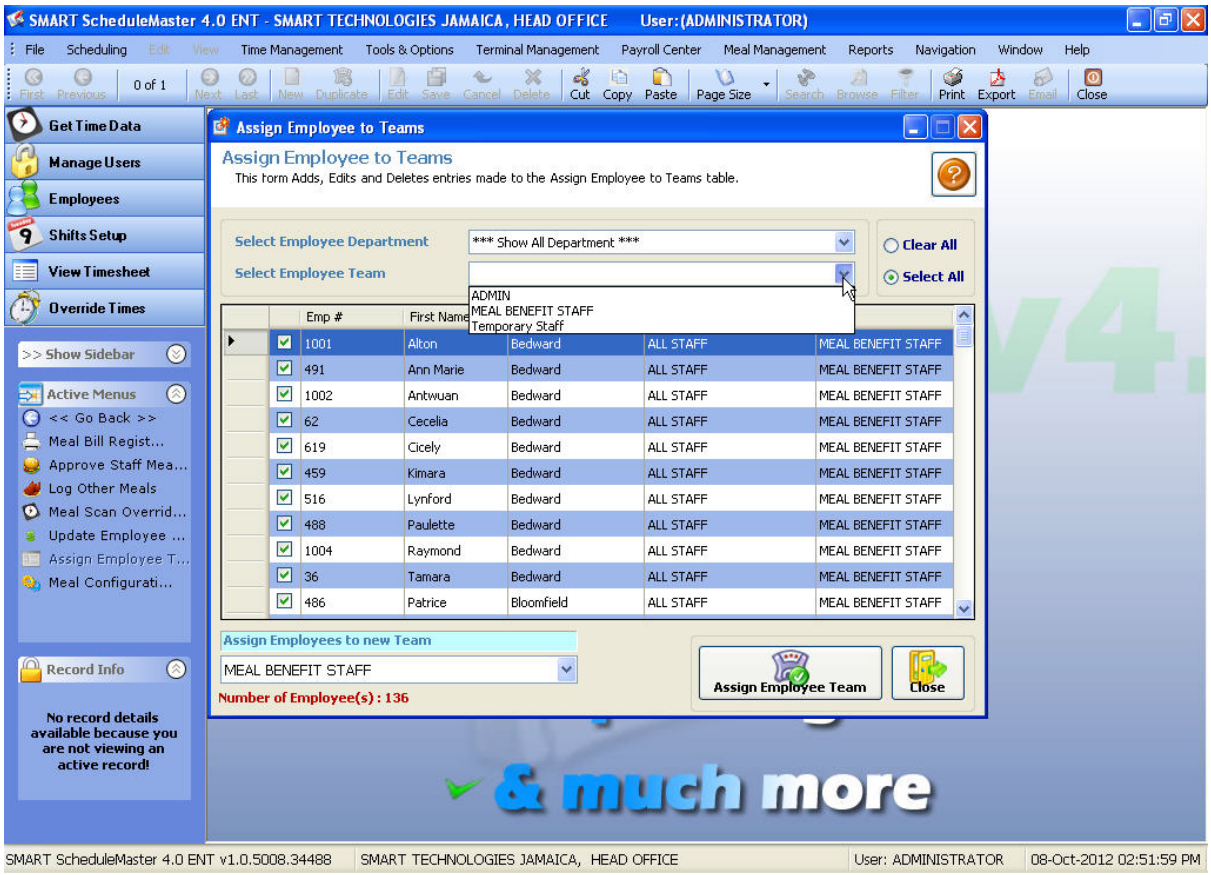


Step 5 - Return to the minimized screen and right click on the drop-down box

Step 6 - Click on Refresh List

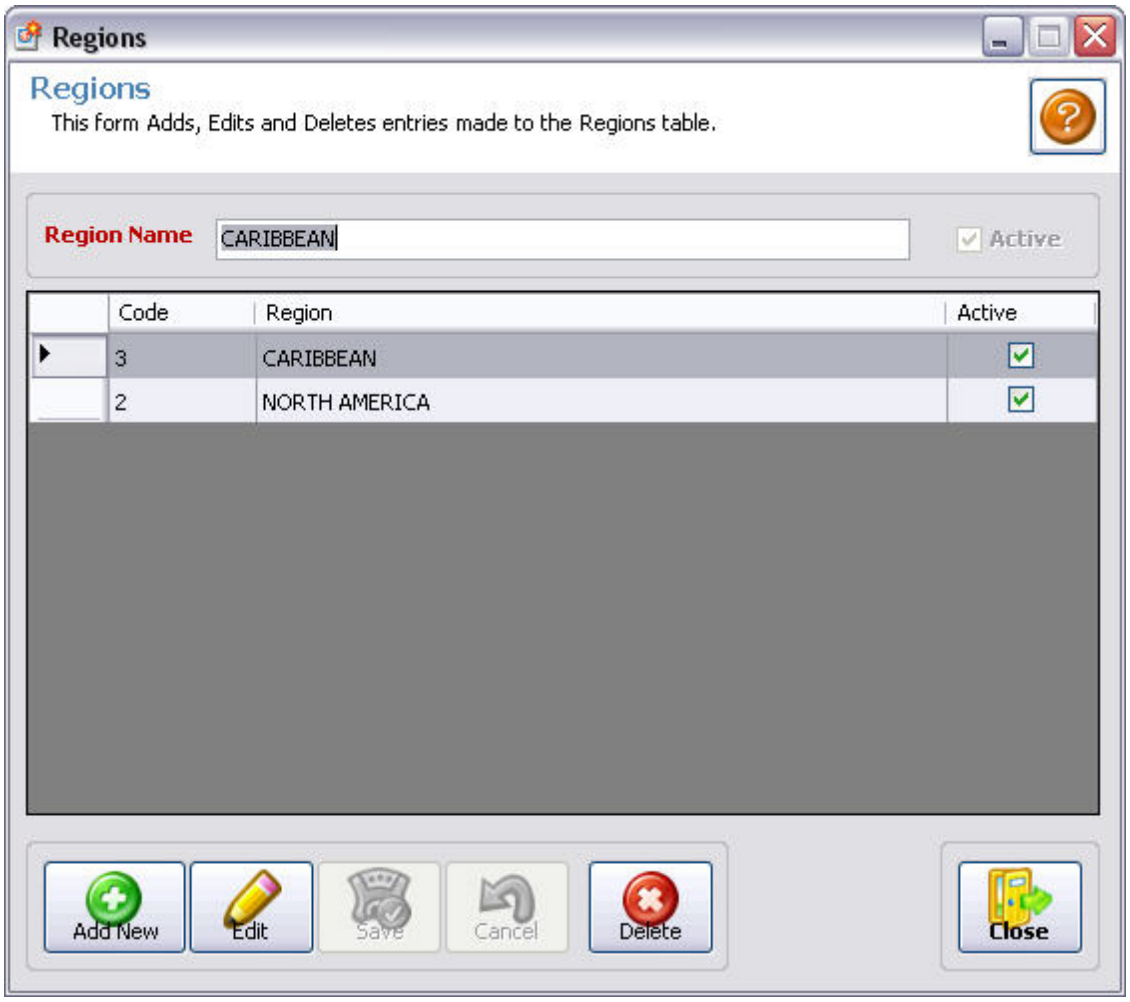


The updated information will now appear:

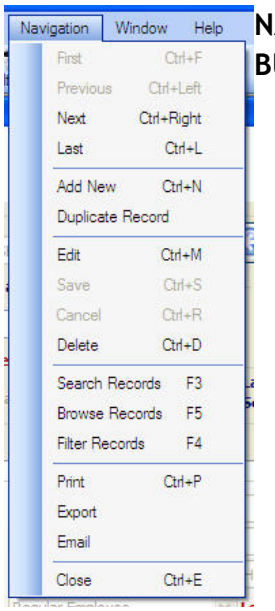


4.1.6.2 Region

The organisation may also be divided into regions. In cases where an company is located in more than one country, it can be grouped in regions. This form allows the company's regions to be added the Staff Manager



The Navigation toolbar and Menu contains functions for record navigation, record management, searching and printing to a printer, export file or email. See below for details of click on option for quick reference.



NAVIGATION BUTTONS
- o First
- o Previous
- o Next
- o Last

DATA ENTRY OPERATIONS
- o Add New
- o Duplicate
- o Edit
- o Save
- o Cancel
- o Delete
- o Cut, Copy & Paste

SEARCH OPTIONS
- o Page Size
- o Search
- o Browse
- o Filter

PRINTING
- o Print
- o Export
- o Email

NAVIGATION BUTTONS

These buttons are used to navigate records on a data entry screen.

First : First navigates to the first record in the full record (or filtered) list.
Previous : Previous navigates to one record previous to the current record on screen (like a back button). Current record -1
Next : Next navigates to one record next to the current record on screen (like a forward button). Current record +1
Last : Last navigates to the last record in the full record (or filtered) list.

CUT, COPY AND PASTE

The cut, copy and paste buttons works similar to the operations in the Windows operating system.

PAGE SIZE

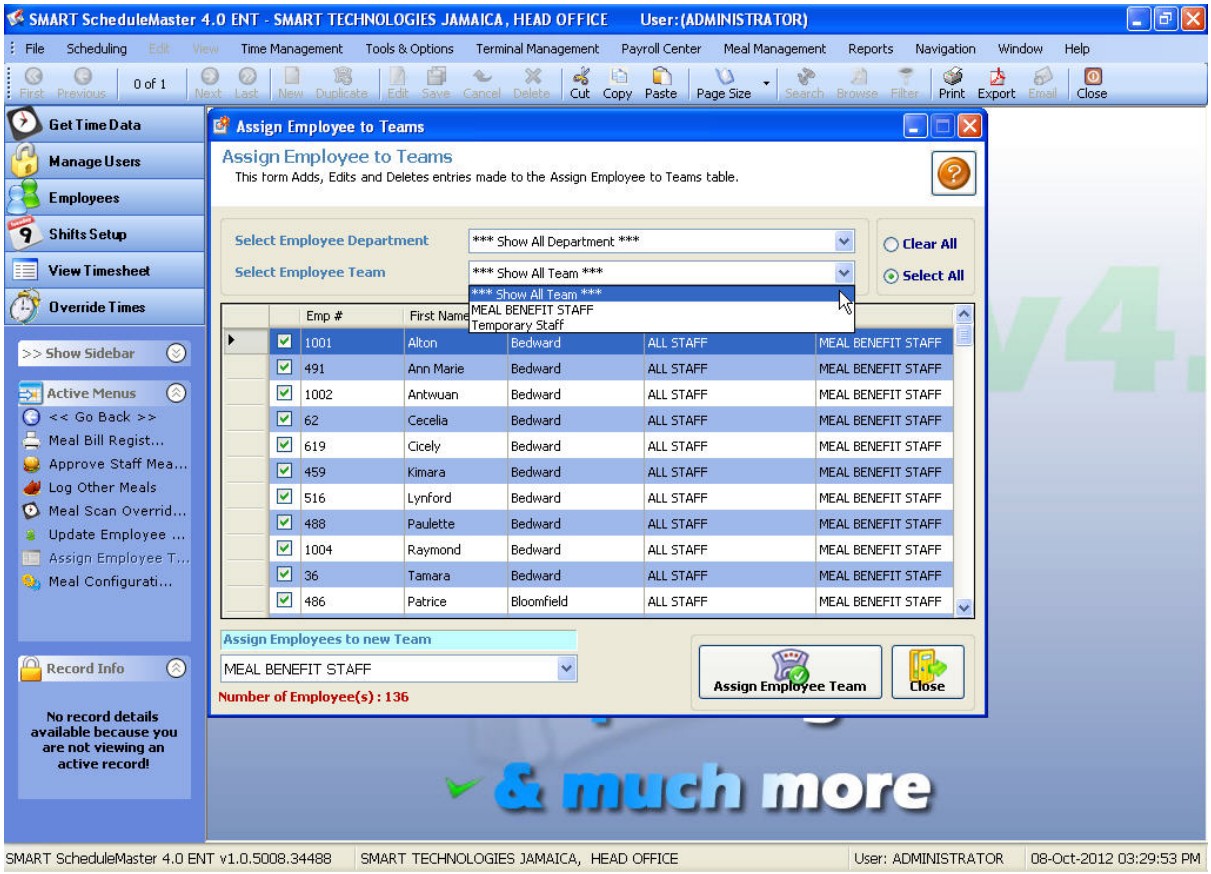
© 2014 Enter your company name

Page Size determines the maximum number of records that are retrieved from the database at any one time. This is an efficiency tool to improve performance. Eg. Opening the employee screen if set to maximum page size may pull up to 32,000 at once which may delay the application. Further, the user still have to browse, search or filter that list of find the desired record. Setting the page size to an optimal number or a low number will ensure all screens are opened promptly then the specified search will only return the desired records and not the entire record list.

Each user can set their desired page for data retrieval and it will apply to all data entry screens within the application.

HOW TO REFRESH DROP DOWN LISTS

When working in a particular screen, sometimes users will need to add/create new options within their drop down boxes. Here is an image of a screen prior to adding the new option in the drop down box:

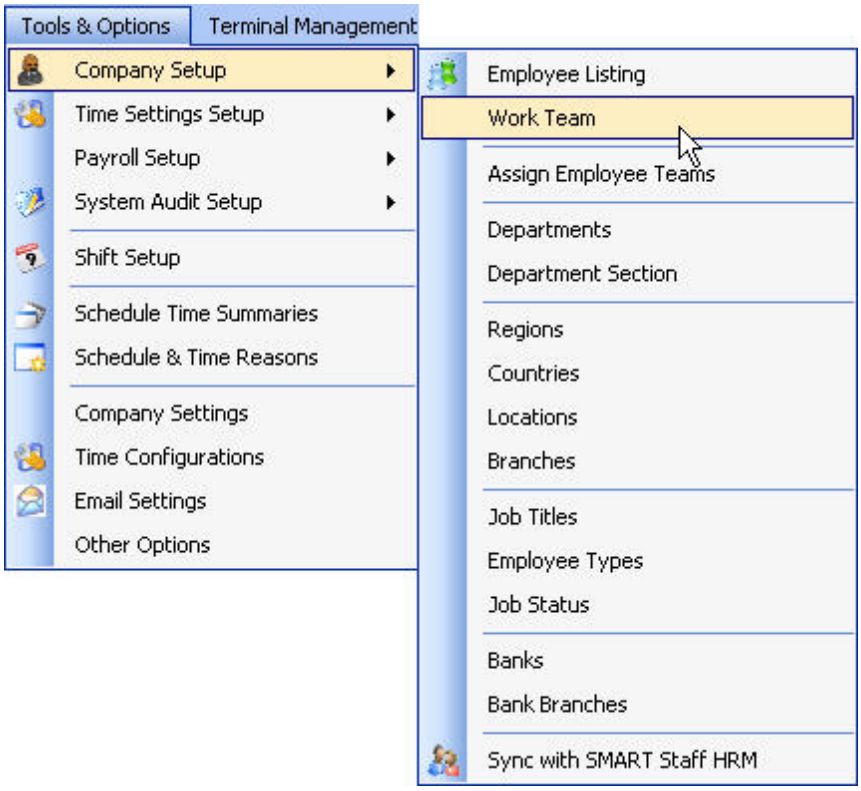


The process of adding options to a drop down box is carried out mostly in your

Maintenance Menu. The user can simply minimize the current screen and open the relevant screen in the Maintenance Menu. They then proceed to add the relevant information for the drop down box and save. Once saved, they can return to the minimized screen and Refresh the list by right clicking on the drop down box and selecting Refresh List. The following screen shots detail the process:

E.g. Adding A Work Team.

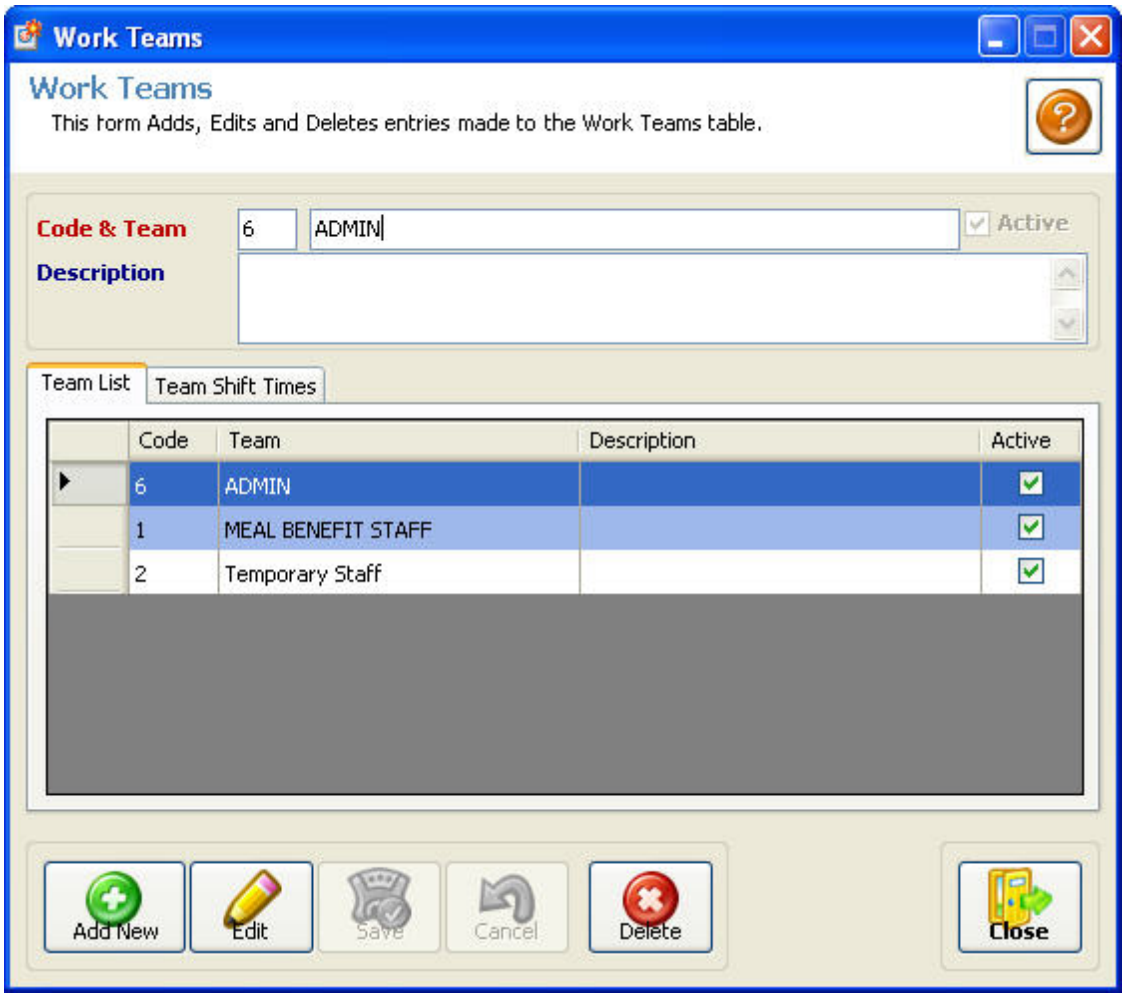
Step 1 - Minimize your current screen, then open the Work Team option in Company Setup under the Tools & Options Menu



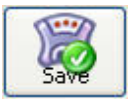
Step 2 - Click the ADD NEW button

Step 3 - Input the Code and Team Name

© 2014 Enter your company name

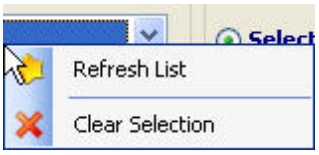


Step 4 - Save the Information

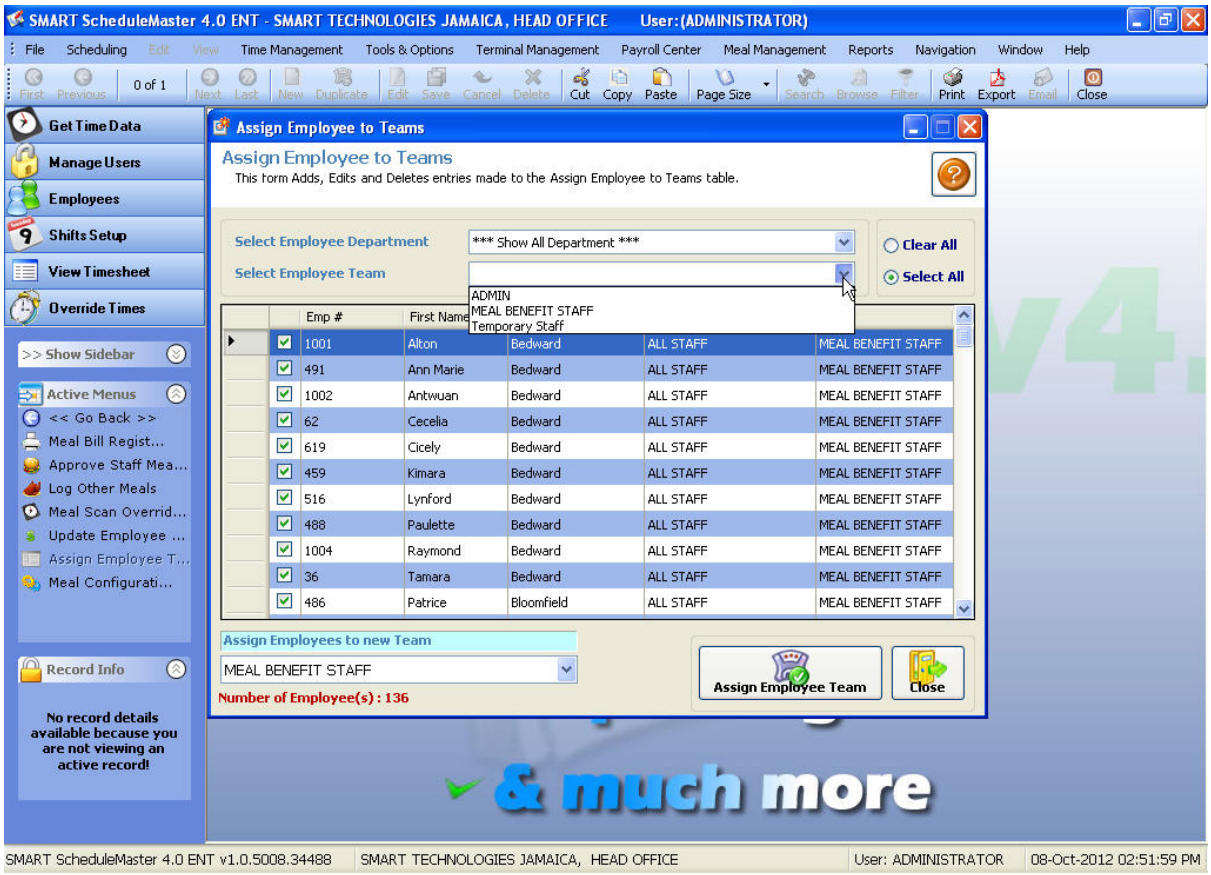


Step 5 - Return to the minimized screen and right click on the drop-down box

Step 6 - Click on Refresh List

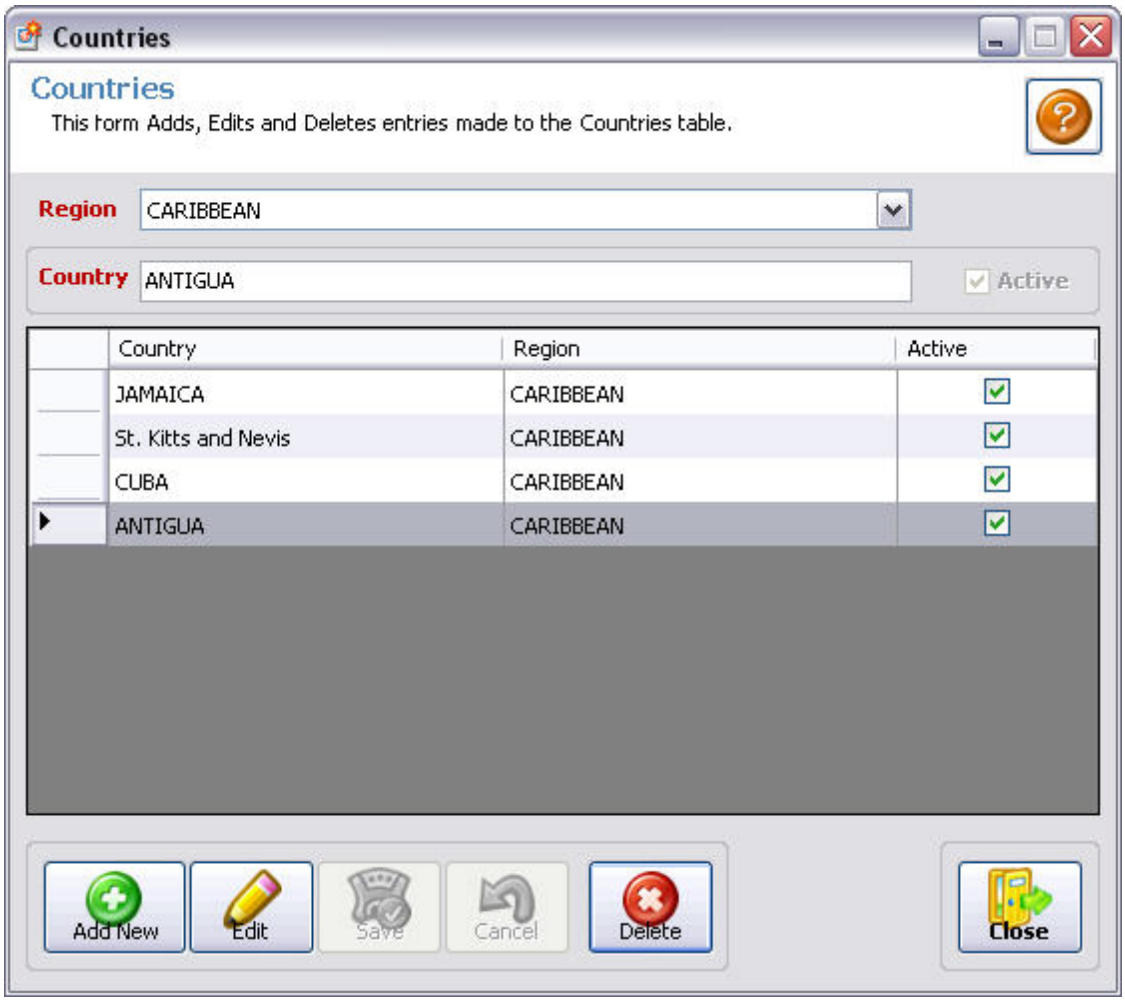


The updated information will now appear:

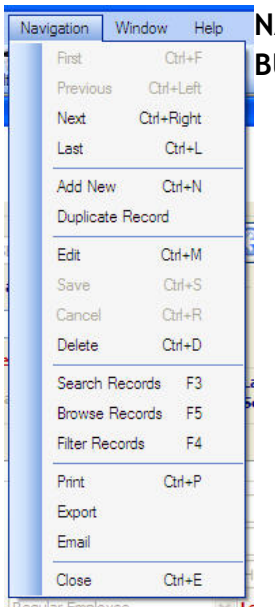


4.1.6.3 Country

The organisation may also be divided into Countries. In cases where an company is located in more than one country, it can be grouped accordingly. This form allows the company's country to be added the Staff Manager



The Navigation toolbar and Menu contains functions for record navigation, record management, searching and printing to a printer, export file or email. See below for details of click on option for quick reference.



NAVIGATION BUTTONS
- o First
- o Previous
- o Next
- o Last

DATA ENTRY OPERATIONS
- o Add New
- o Duplicate
- o Edit
- o Save
- o Cancel
- o Delete
- o Cut, Copy & Paste

SEARCH OPTIONS
- o Page Size
- o Search
- o Browse
- o Filter

PRINTING
- o Print
- o Export
- o Email

NAVIGATION BUTTONS

These buttons are used to navigate records on a data entry screen.

First : First navigates to the first record in the full record (or filtered) list.
Previous : Previous navigates to one record previous to the current record on screen (like a back button). Current record -1
Next : Next navigates to one record next to the current record on screen (like a forward button). Current record +1
Last : Last navigates to the last record in the full record (or filtered) list.

CUT, COPY AND PASTE

The cut, copy and paste buttons works similar to the operations in the Windows operating system.

PAGE SIZE

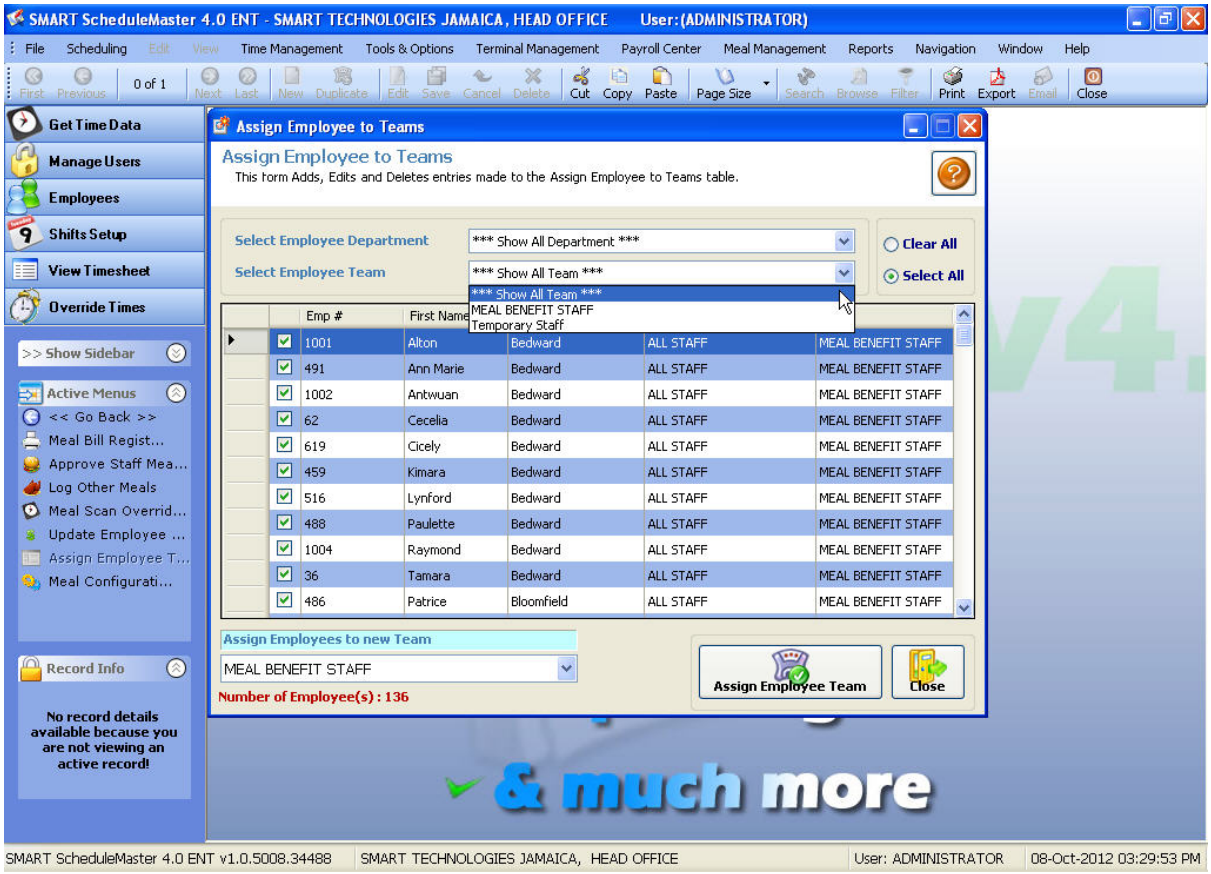
© 2014 Enter your company name

Page Size determines the maximum number of records that are retrieved from the database at any one time. This is an efficiency tool to improve performance. Eg. Opening the employee screen if set to maximum page size may pull up to 32,000 at once which may delay the application. Further, the user still have to browse, search or filter that list of find the desired record. Setting the page size to an optimal number or a low number will ensure all screens are opened promptly then the specified search will only return the desired records and not the entire record list.

Each user can set their desired page for data retrieval and it will apply to all data entry screens within the application.

HOW TO REFRESH DROP DOWN LISTS

When working in a particular screen, sometimes users will need to add/create new options within their drop down boxes. Here is an image of a screen prior to adding the new option in the drop down box:

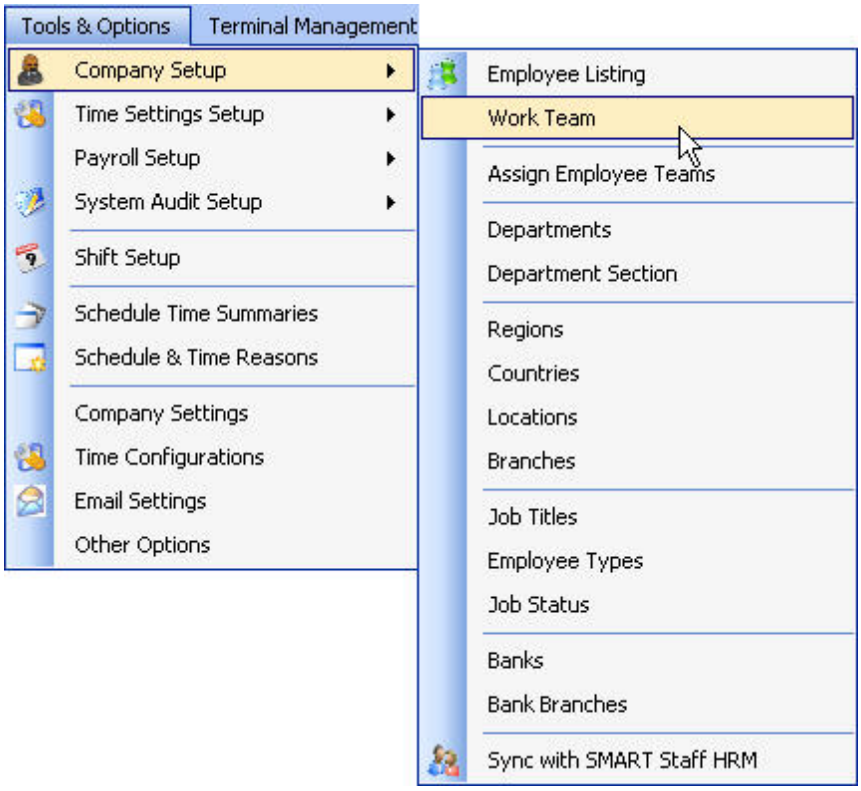


The process of adding options to a drop down box is carried out mostly in your

Maintenance Menu. The user can simply minimize the current screen and open the relevant screen in the Maintenance Menu. They then proceed to add the relevant information for the drop down box and save. Once saved, they can return to the minimized screen and Refresh the list by right clicking on the drop down box and selecting Refresh List. The following screen shots detail the process:

E.g. Adding A Work Team.

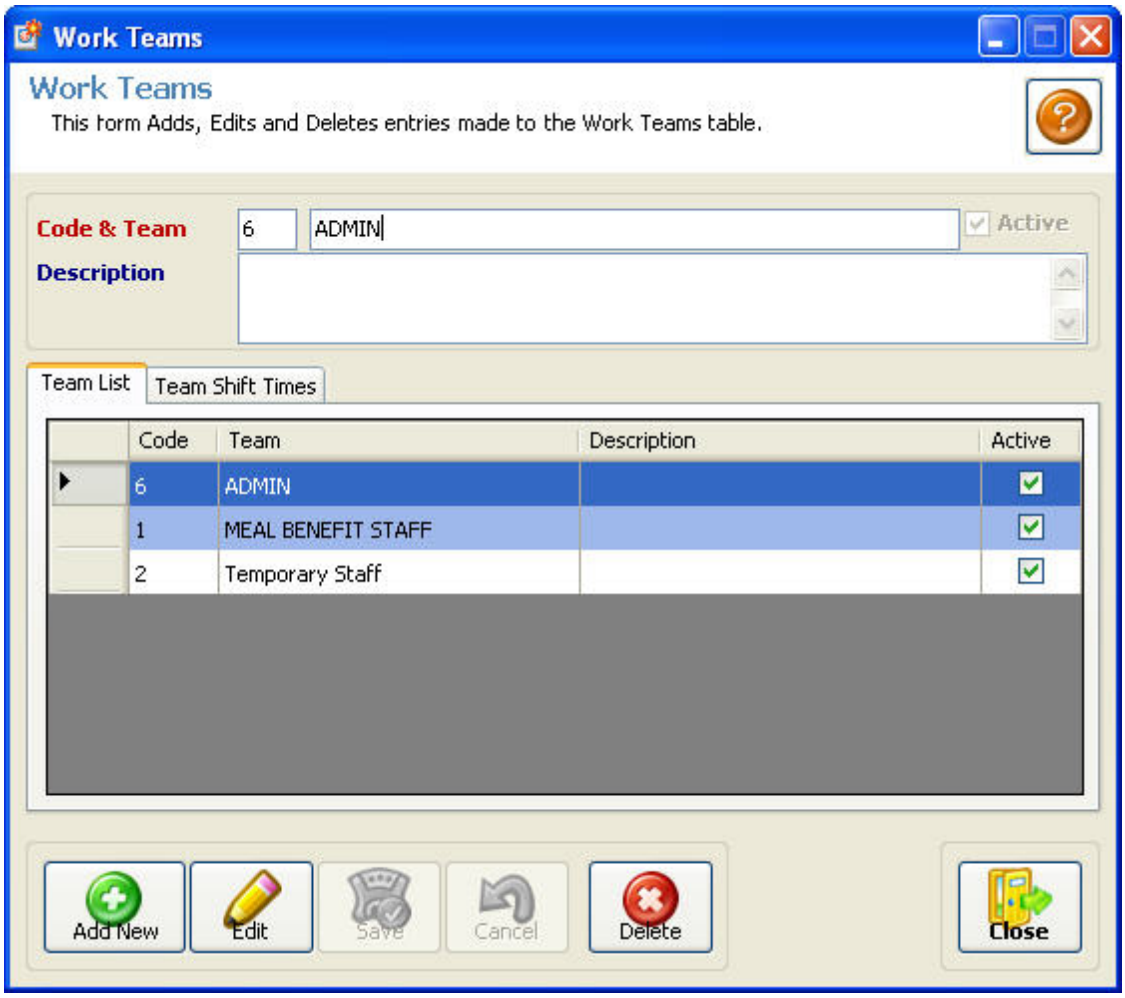
Step 1 - Minimize your current screen, then open the Work Team option in Company Setup under the Tools & Options Menu



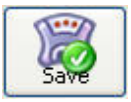
Step 2 - Click the ADD NEW button

Step 3 - Input the Code and Team Name

© 2014 Enter your company name

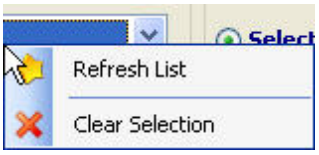


Step 4 - Save the Information

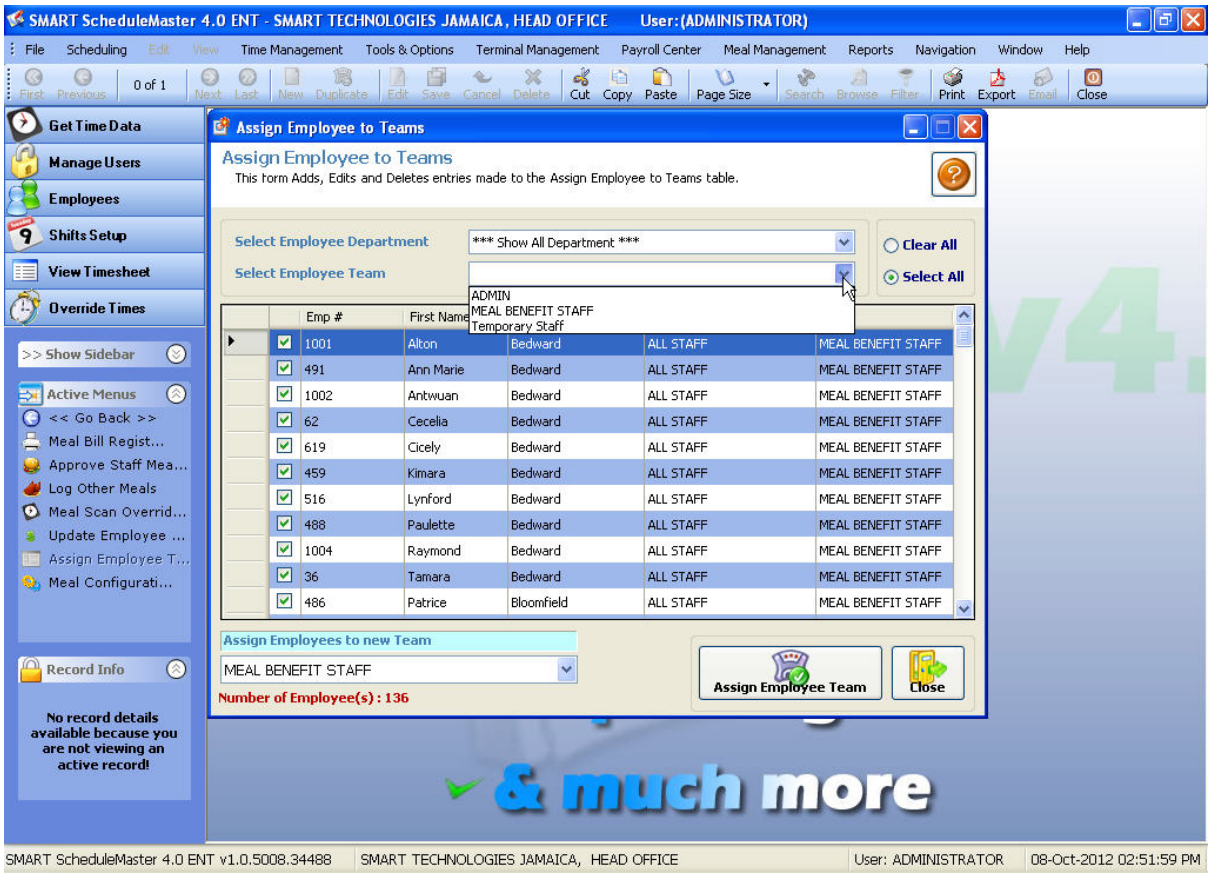


Step 5 - Return to the minimized screen and right click on the drop-down box

Step 6 - Click on Refresh List

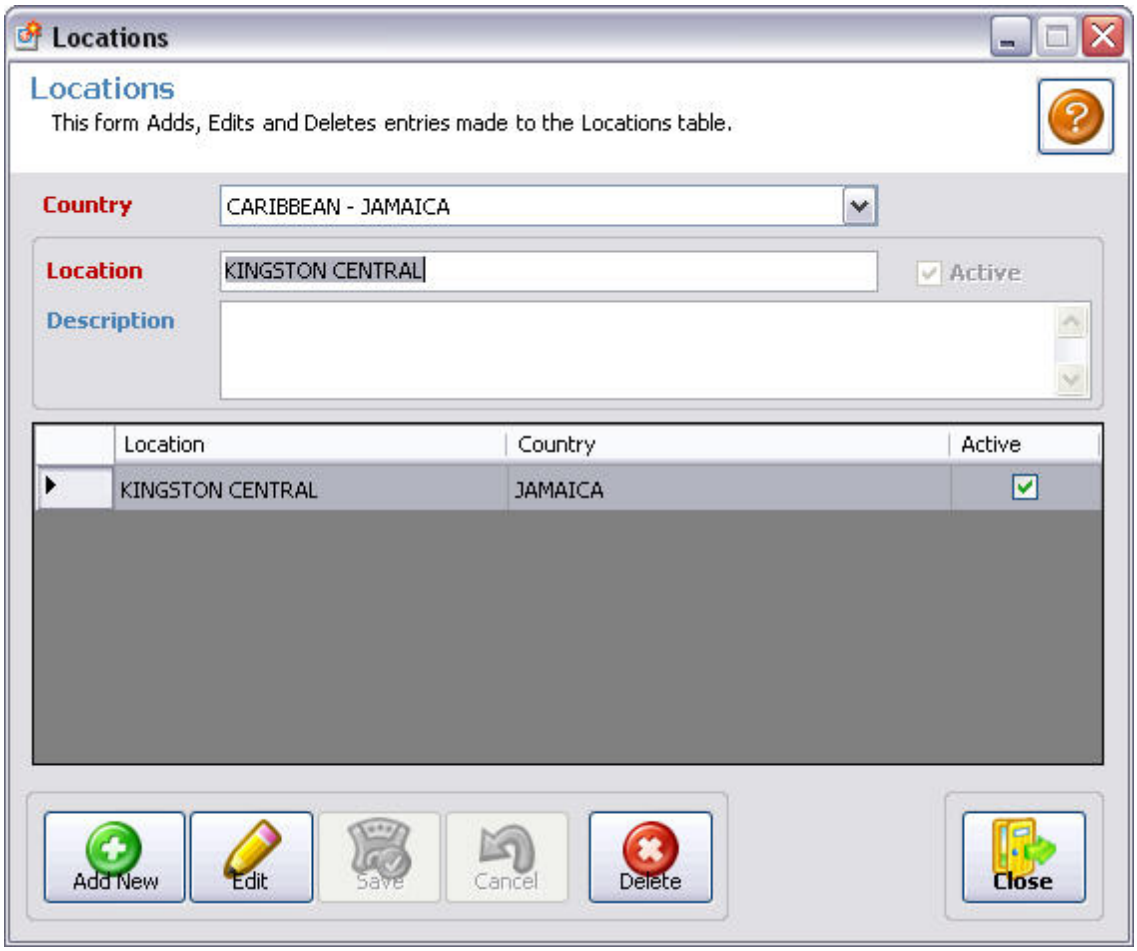


The updated information will now appear:

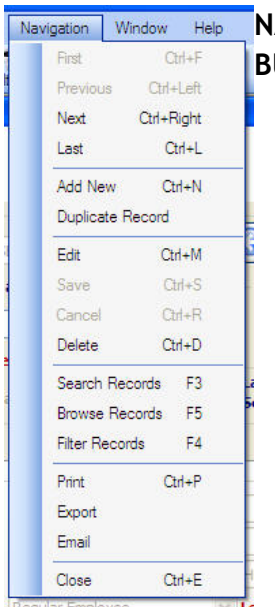


4.1.6.4 Location

A location can now be added to the Staff Manager. A Location will be grouped by Contry



The Navigation toolbar and Menu contains functions for record navigation, record management, searching and printing to a printer, export file or email. See below for details of click on option for quick reference.



NAVIGATION BUTTONS
- o First
- o Previous
- o Next
- o Last

DATA ENTRY OPERATIONS
- o Add New
- o Duplicate
- o Edit
- o Save
- o Cancel
- o Delete
- o Cut, Copy & Paste

SEARCH OPTIONS
- o Page Size
- o Search
- o Browse
- o Filter

PRINTING
- o Print
- o Export
- o Email

NAVIGATION BUTTONS

These buttons are used to navigate records on a data entry screen.

First : First navigates to the first record in the full record (or filtered) list.
Previous : Previous navigates to one record previous to the current record on screen (like a back button). Current record -1
Next : Next navigates to one record next to the current record on screen (like a forward button). Current record +1
Last : Last navigates to the last record in the full record (or filtered) list.

CUT, COPY AND PASTE

The cut, copy and paste buttons works similar to the operations in the Windows operating system.

PAGE SIZE

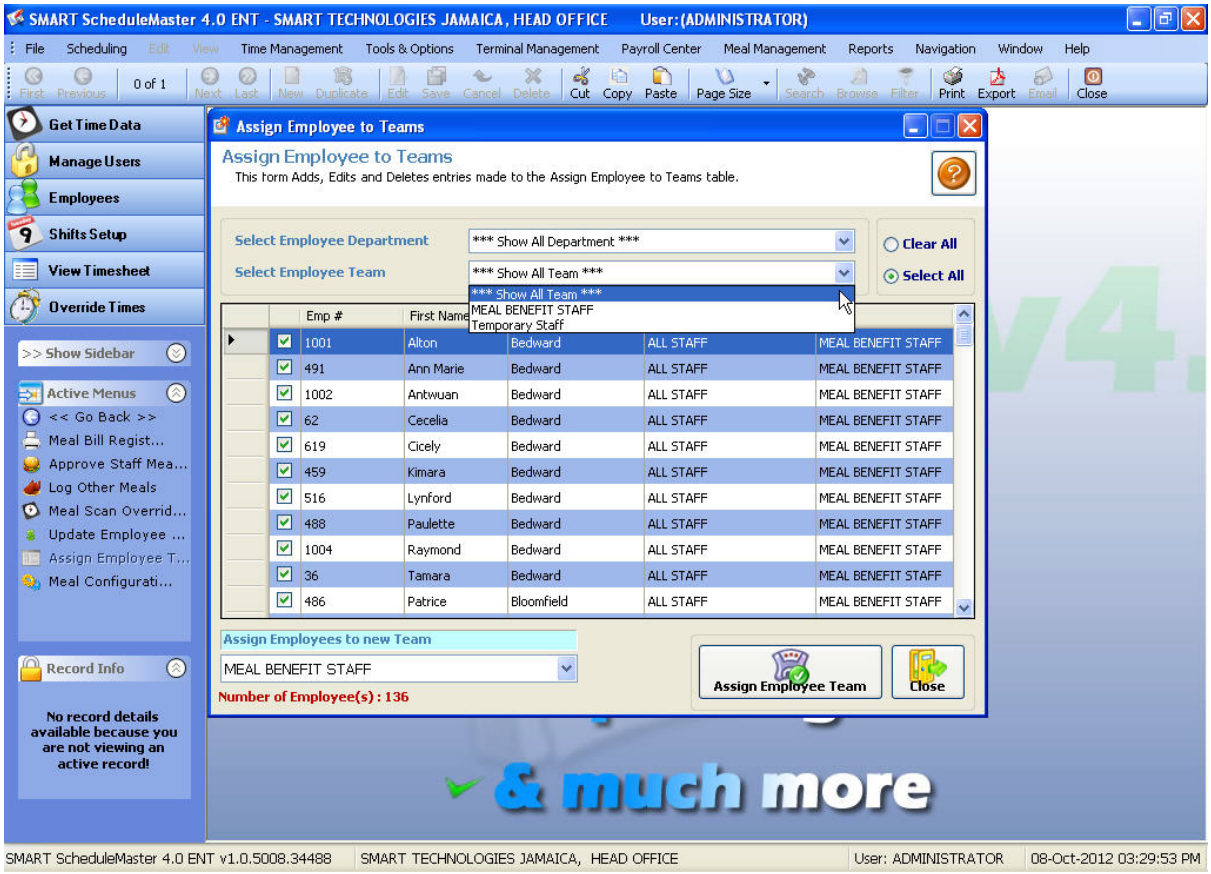
© 2014 Enter your company name

Page Size determines the maximum number of records that are retrieved from the database at any one time. This is an efficiency tool to improve performance. Eg. Opening the employee screen if set to maximum page size may pull up to 32,000 at once which may delay the application. Further, the user still have to browse, search or filter that list of find the desired record. Setting the page size to an optimal number or a low number will ensure all screens are opened promptly then the specified search will only return the desired records and not the entire record list.

Each user can set their desired page for data retrieval and it will apply to all data entry screens within the application.

HOW TO REFRESH DROP DOWN LISTS

When working in a particular screen, sometimes users will need to add/create new options within their drop down boxes. Here is an image of a screen prior to adding the new option in the drop down box:

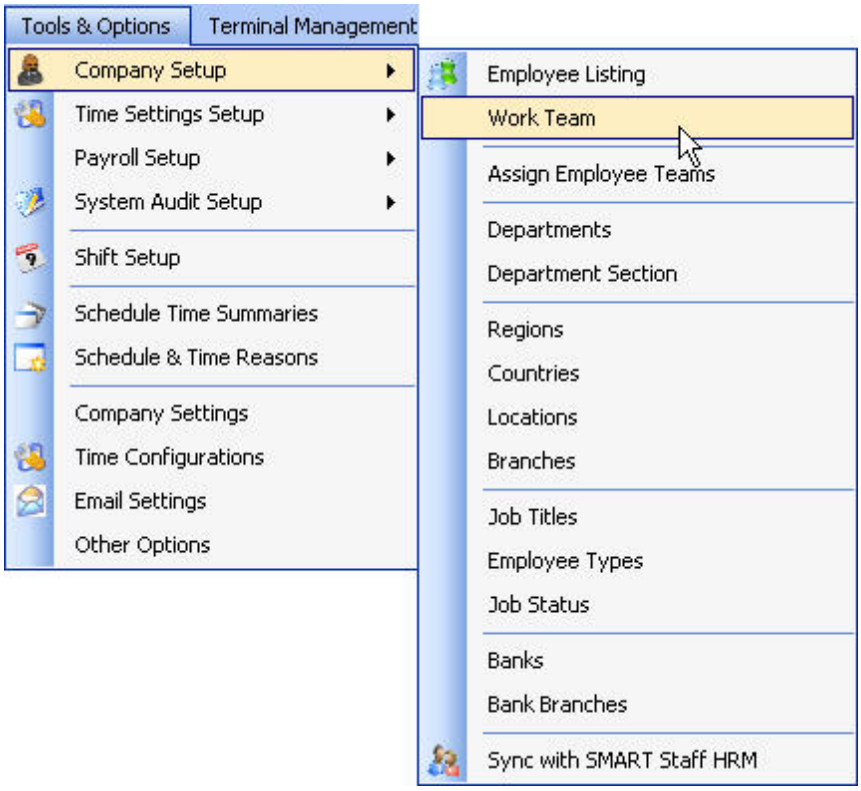


The process of adding options to a drop down box is carried out mostly in your

Maintenance Menu. The user can simply minimize the current screen and open the relevant screen in the Maintenance Menu. They then proceed to add the relevant information for the drop down box and save. Once saved, they can return to the minimized screen and Refresh the list by right clicking on the drop down box and selecting Refresh List. The following screen shots detail the process:

E.g. Adding A Work Team.

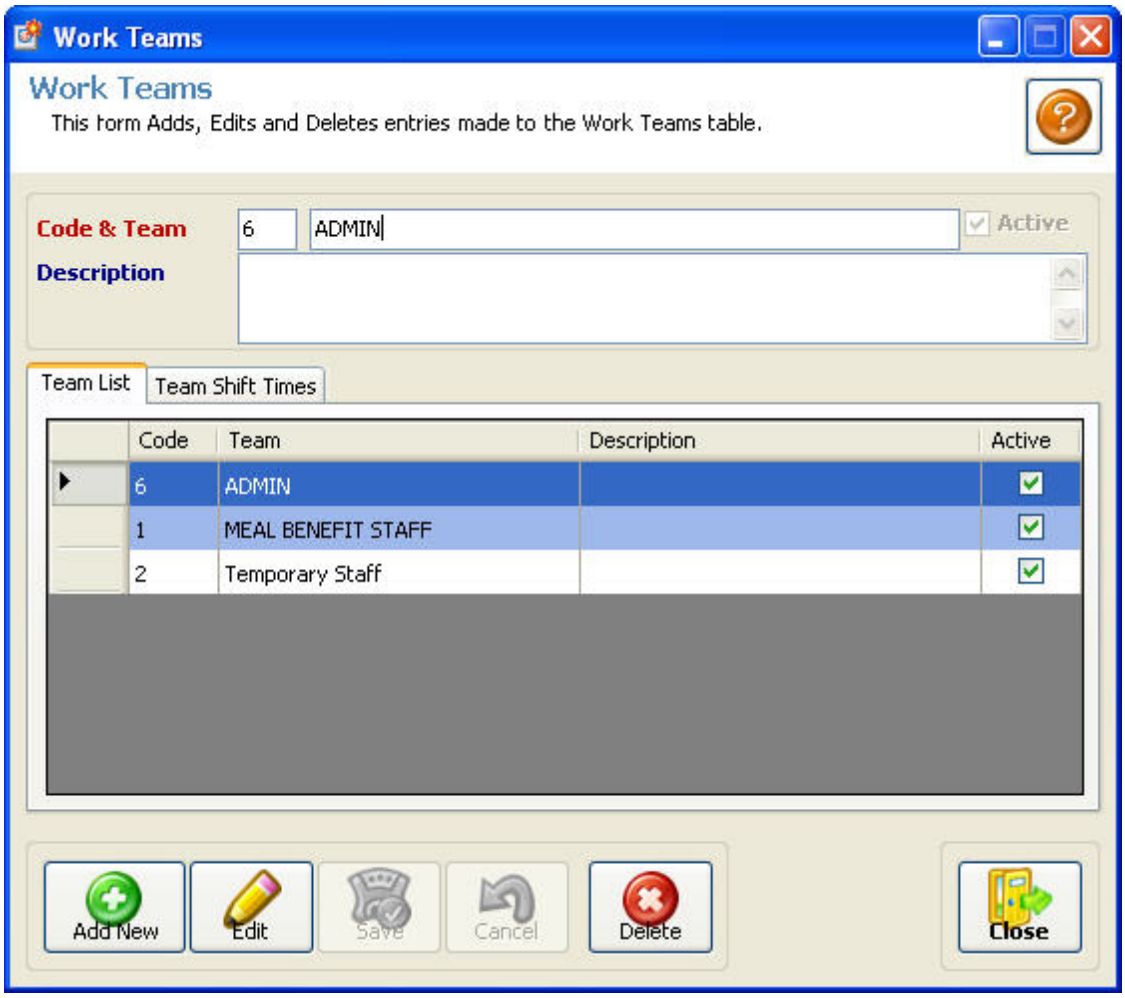
Step 1 - Minimize your current screen, then open the Work Team option in Company Setup under the Tools & Options Menu



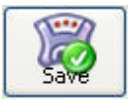
Step 2 - Click the ADD NEW button

Step 3 - Input the Code and Team Name

© 2014 Enter your company name

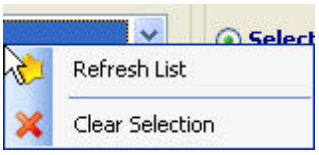


Step 4 - Save the Information

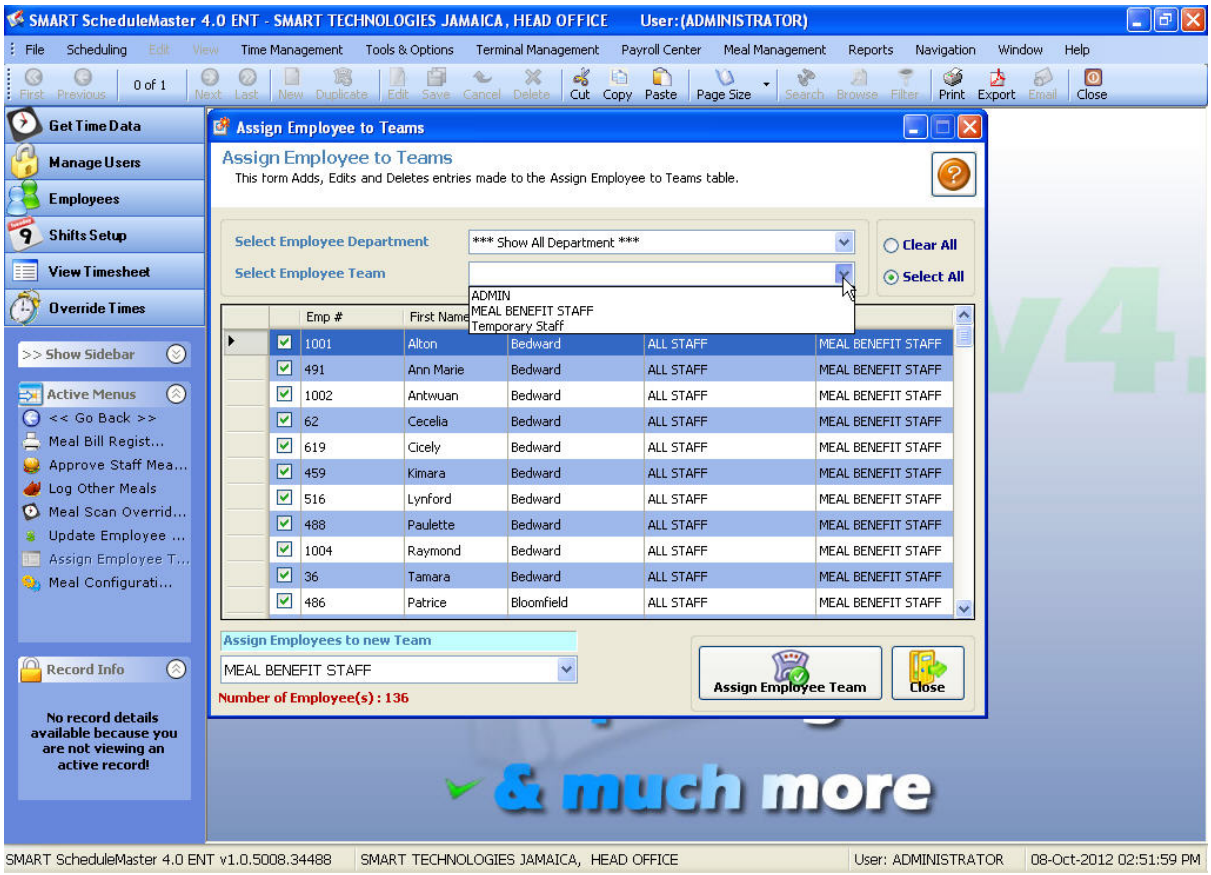


Step 5 - Return to the minimized screen and right click on the drop-down box

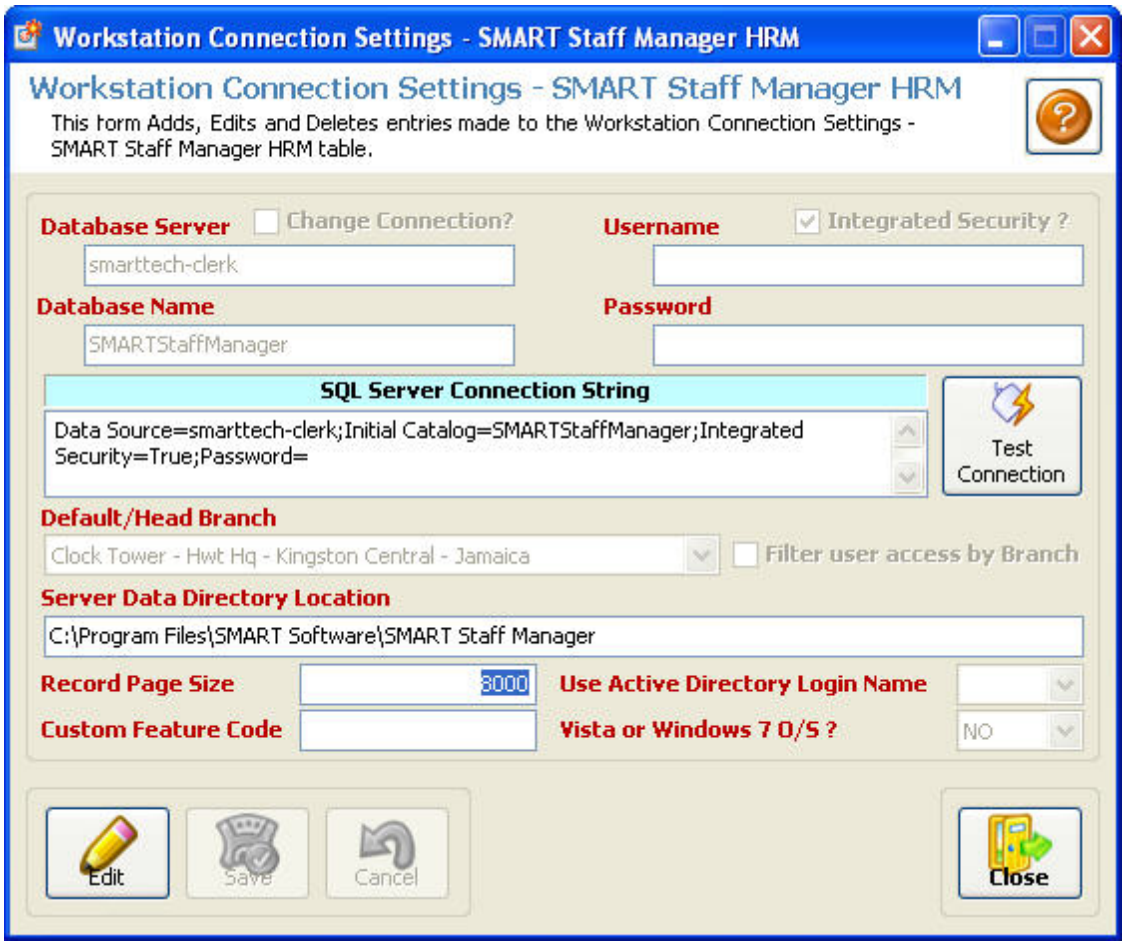
Step 6 - Click on Refresh List



The updated information will now appear:

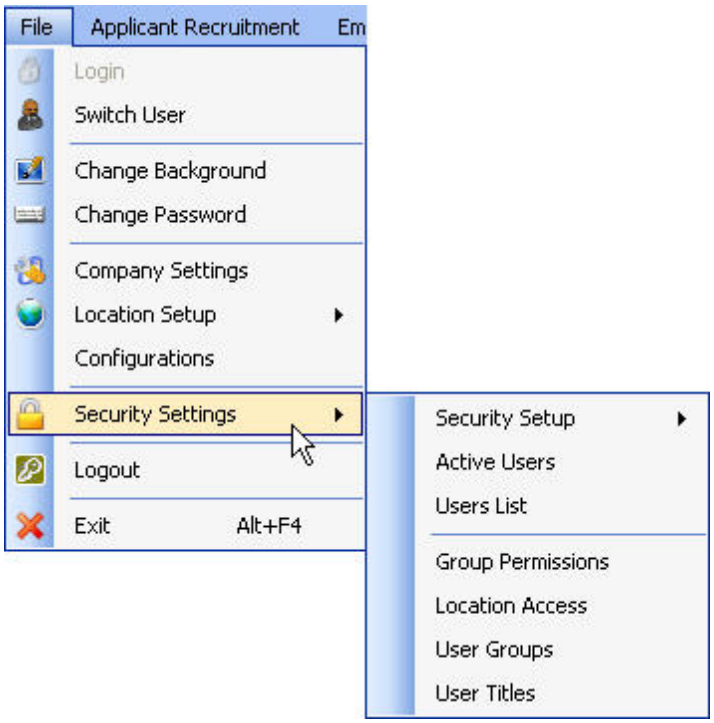


4.1.7 Configurations



4.1.8 Security Settings

Security settings can be accessed from the File menu, the allows a user with administrative rights to access and configure the security aspects of the SMART Staff Manager



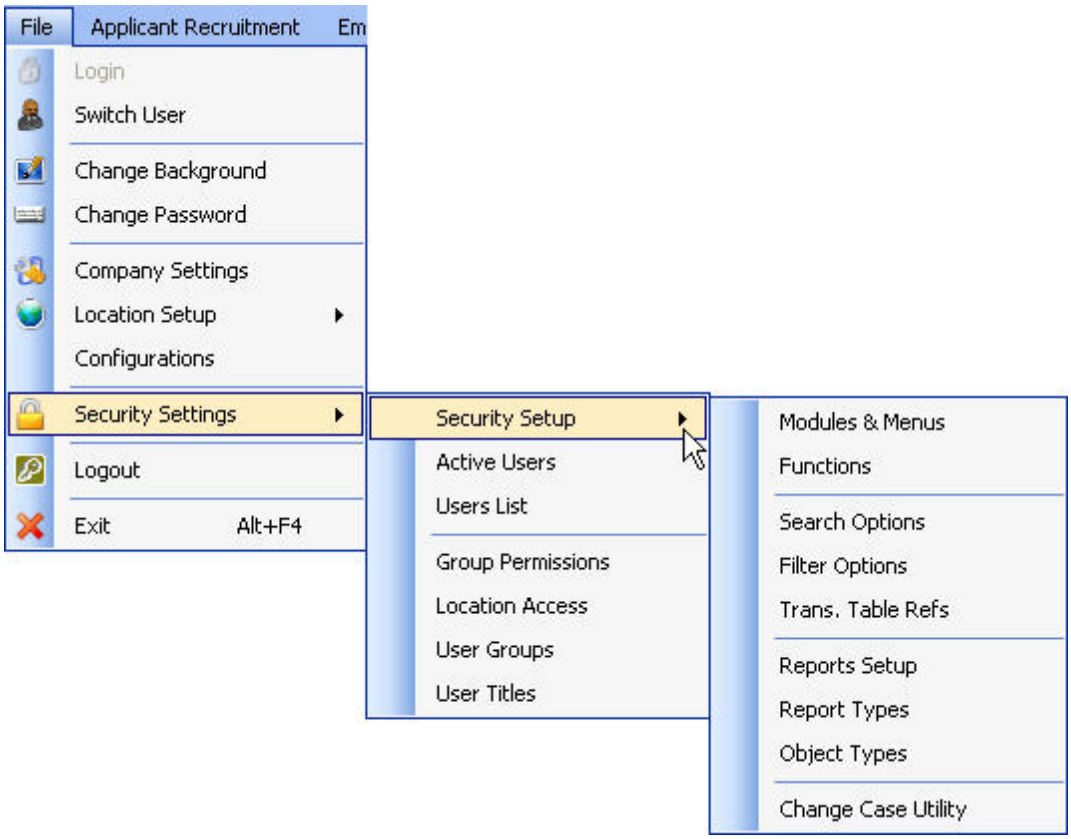
RELATED TOPICS:

SECURITY SETUP
ACTIVE USERS
USERS LIST
GROUP PERMISSIONS
LOCATION ACCESS
USER GROUPS
USER TITLES

4.1.8.1 Security Setup

Security Setting houses the security Setup options which allows changes to he modules and menues , funstions and search options.

© 2014 Enter your company name

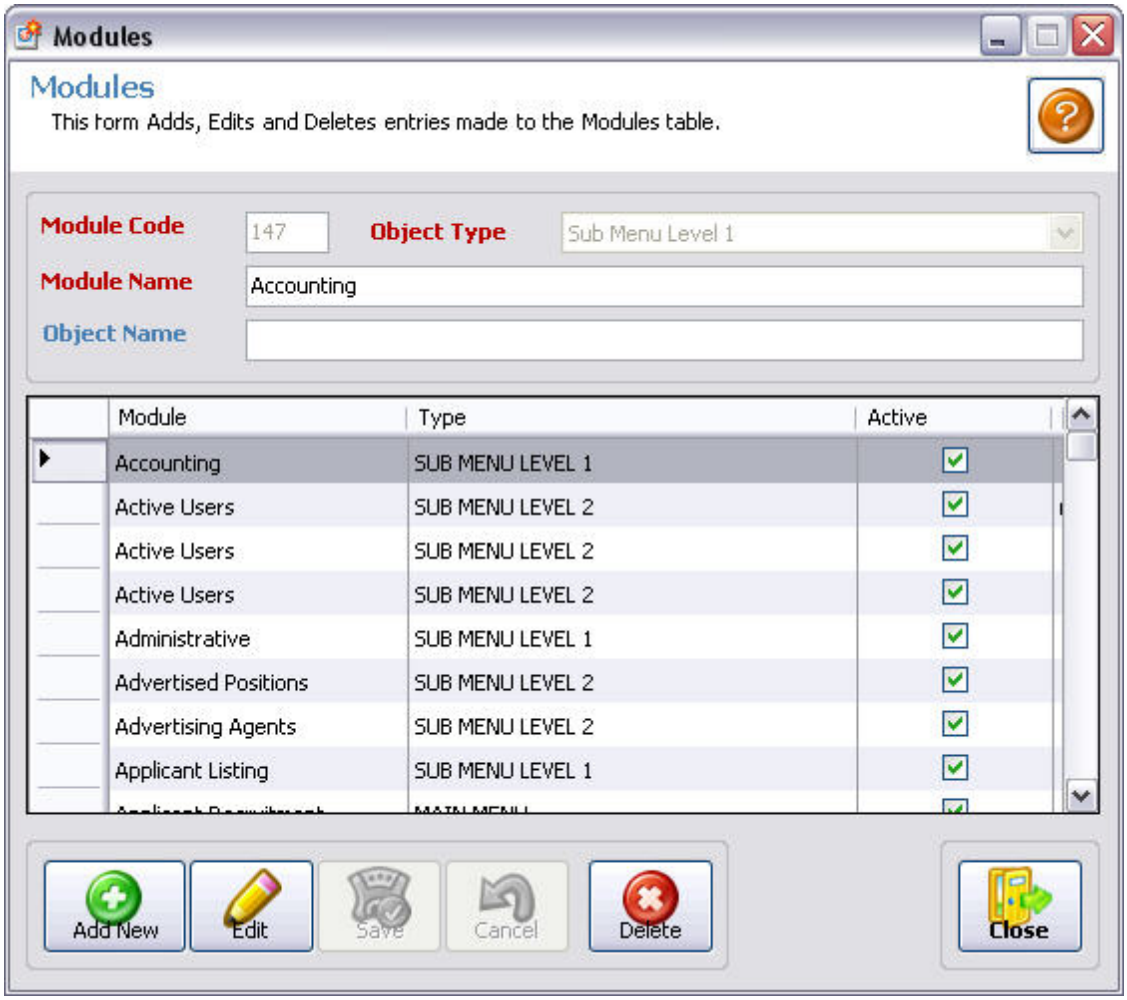


RELATED TOPICS

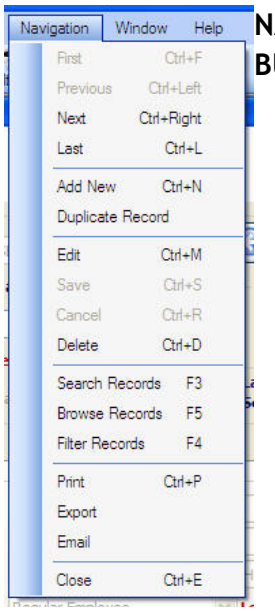
MODULES AND MENUS
FUNCTIONS
SEARCH OPTIONS
FILTER OPTIONS
TRANSACTION TABLE REFERENCES
REPORTS SETUP
REPORT TYPES
OBJECT TYPES
CHANGE CASE UTILITY

© 2014 Enter your company name

4.1.8.1.1 Modules and Menus - security



The Navigation toolbar and Menu contains functions for record navigation, record management, searching and printing to a printer, export file or email. See below for details of click on option for quick reference.



NAVIGATION BUTTONS
- o First
- o Previous
- o Next
- o Last

DATA ENTRY OPERATIONS
- o Add New
- o Duplicate
- o Edit
- o Save
- o Cancel
- o Delete
- o Cut, Copy & Paste

SEARCH OPTIONS
- o Page Size
- o Search
- o Browse
- o Filter

PRINTING
- o Print
- o Export
- o Email

NAVIGATION BUTTONS

These buttons are used to navigate records on a data entry screen.

First : First navigates to the first record in the full record (or filtered) list.
Previous : Previous navigates to one record previous to the current record on screen (like a back button). Current record -1
Next : Next navigates to one record next to the current record on screen (like a forward button). Current record +1
Last : Last navigates to the last record in the full record (or filtered) list.

CUT, COPY AND PASTE

The cut, copy and paste buttons works similar to the operations in the Windows operating system.

PAGE SIZE

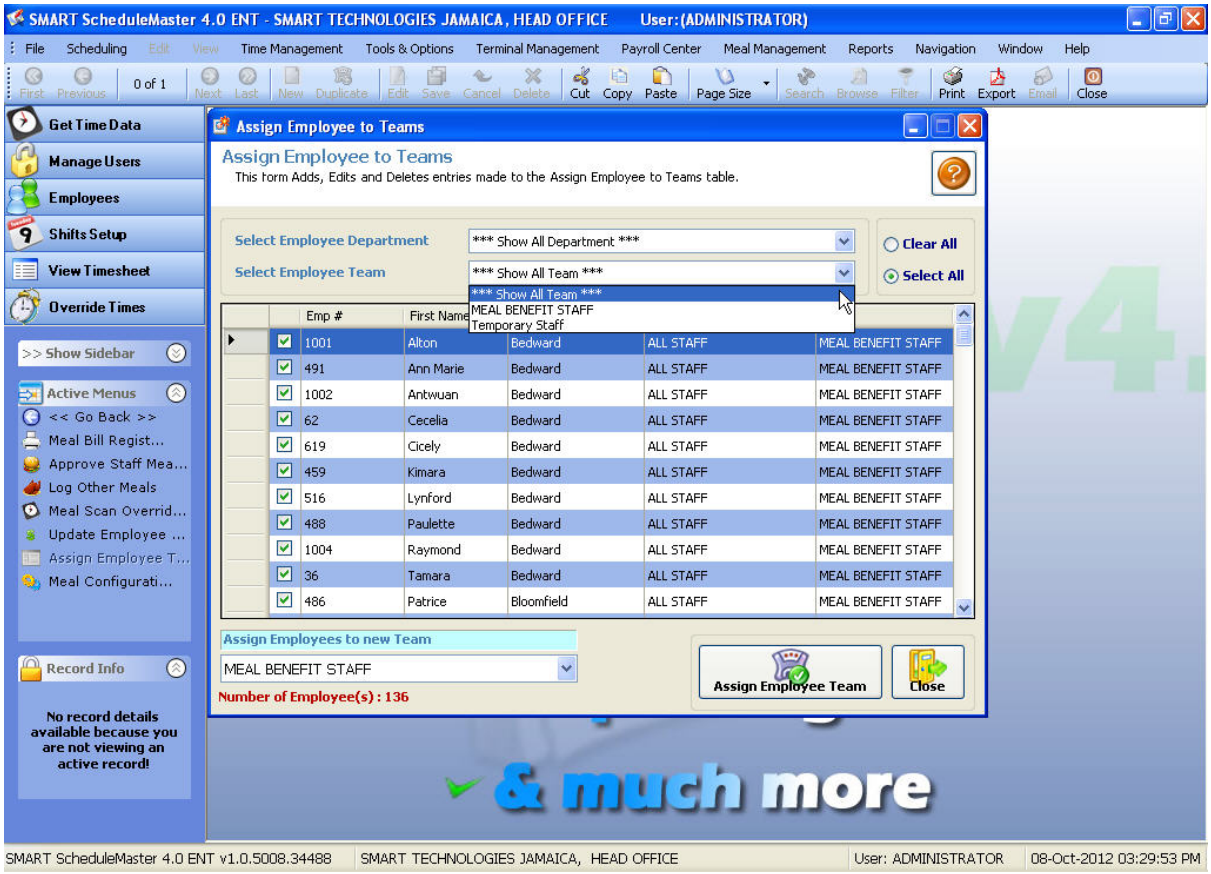
© 2014 Enter your company name

Page Size determines the maximum number of records that are retrieved from the database at any one time. This is an efficiency tool to improve performance. Eg. Opening the employee screen if set to maximum page size may pull up to 32,000 at once which may delay the application. Further, the user still have to browse, search or filter that list of find the desired record. Setting the page size to an optimal number or a low number will ensure all screens are opened promptly then the specified search will only return the desired records and not the entire record list.

Each user can set their desired page for data retrieval and it will apply to all data entry screens within the application.

HOW TO REFRESH DROP DOWN LISTS

When working in a particular screen, sometimes users will need to add/create new options within their drop down boxes. Here is an image of a screen prior to adding the new option in the drop down box:

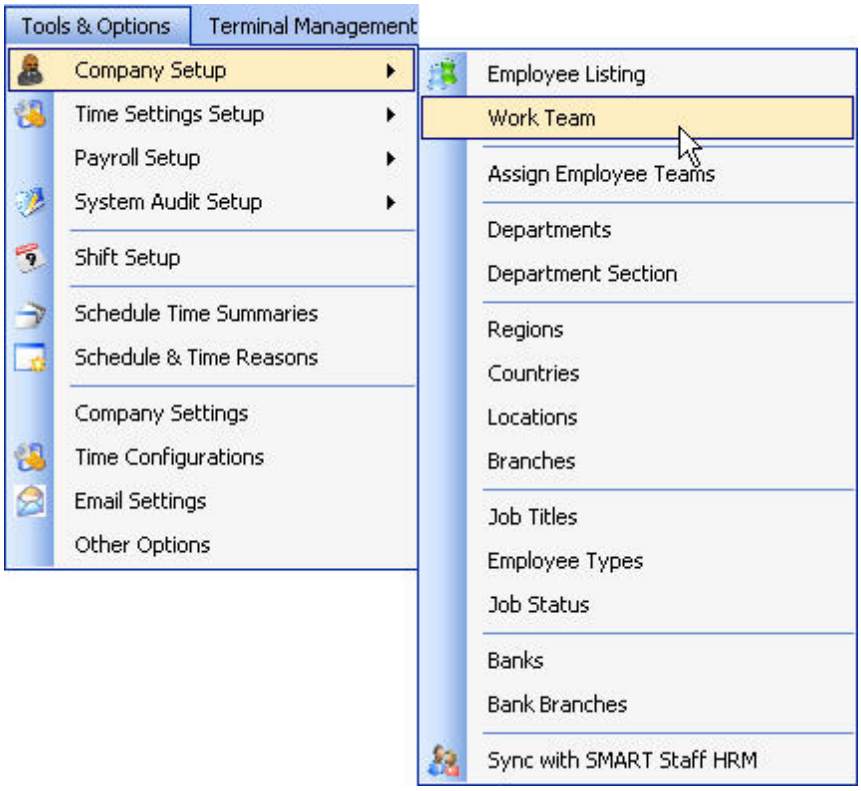


The process of adding options to a drop down box is carried out mostly in your

Maintenance Menu. The user can simply minimize the current screen and open the relevant screen in the Maintenance Menu. They then proceed to add the relevant information for the drop down box and save. Once saved, they can return to the minimized screen and Refresh the list by right clicking on the drop down box and selecting Refresh List. The following screen shots detail the process:

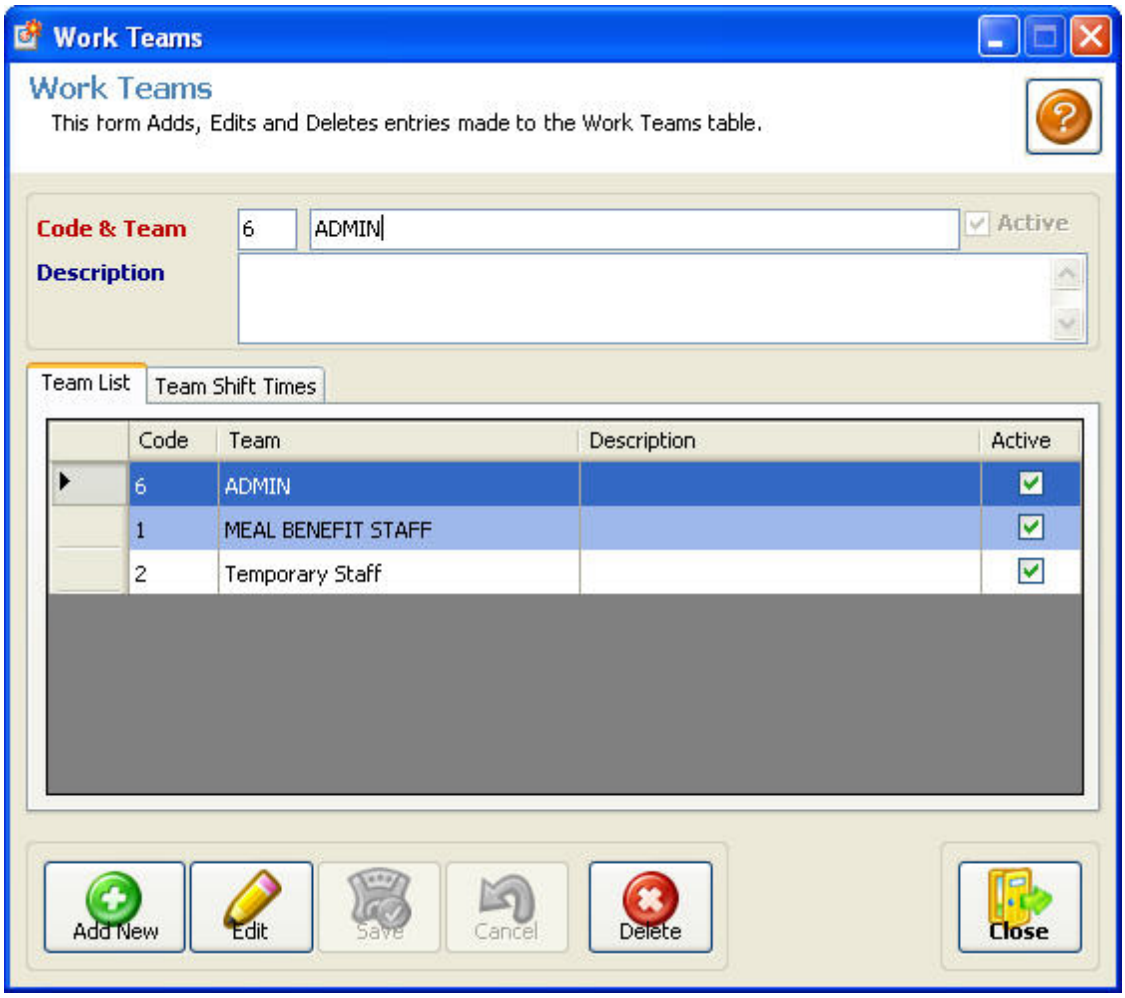
E.g. Adding A Work Team.

Step 1 - Minimize your current screen, then open the Work Team option in Company Setup under the Tools & Options Menu

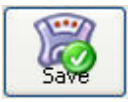


Step 2 - Click the ADD NEW button

Step 3 - Input the Code and Team Name

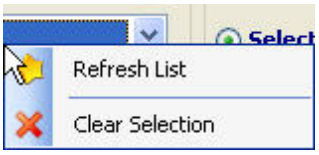


Step 4 - Save the Information

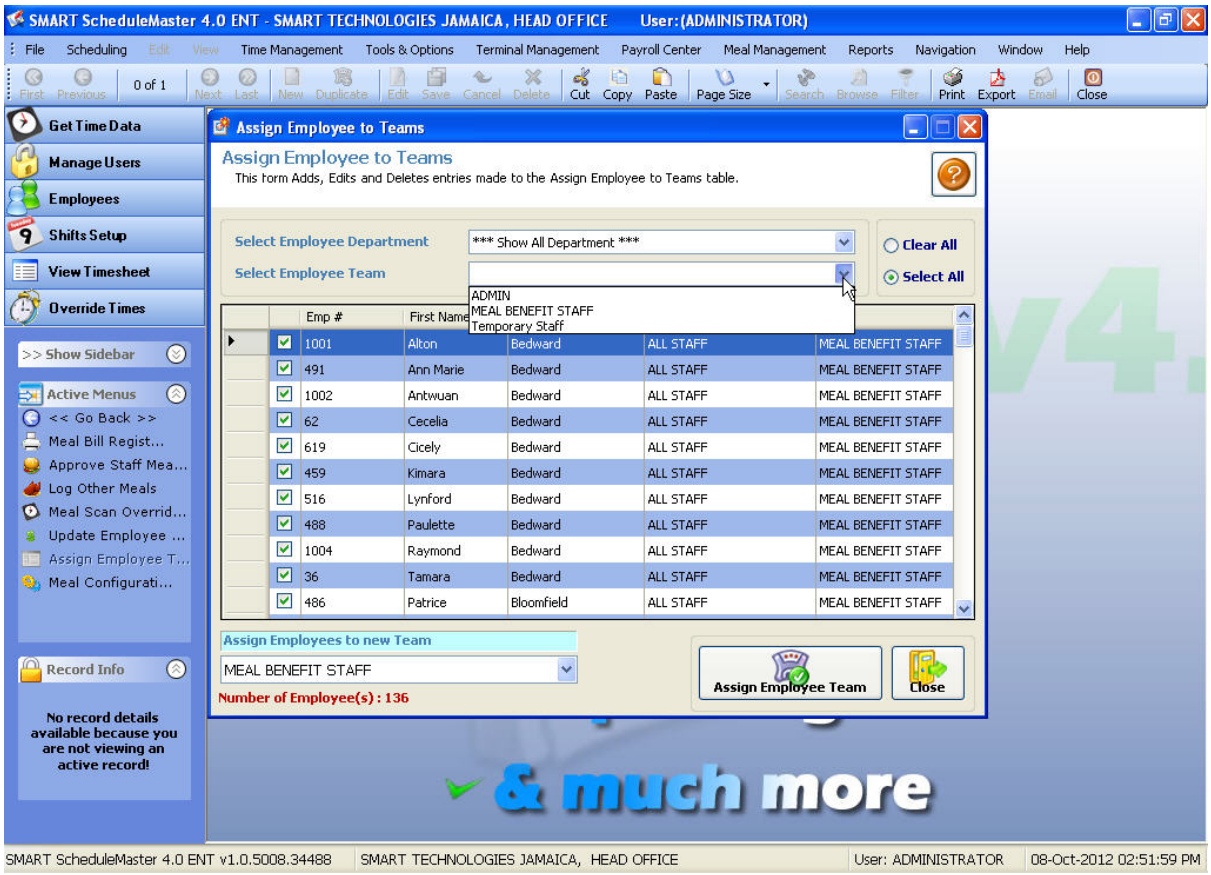


Step 5 - Return to the minimized screen and right click on the drop-down box

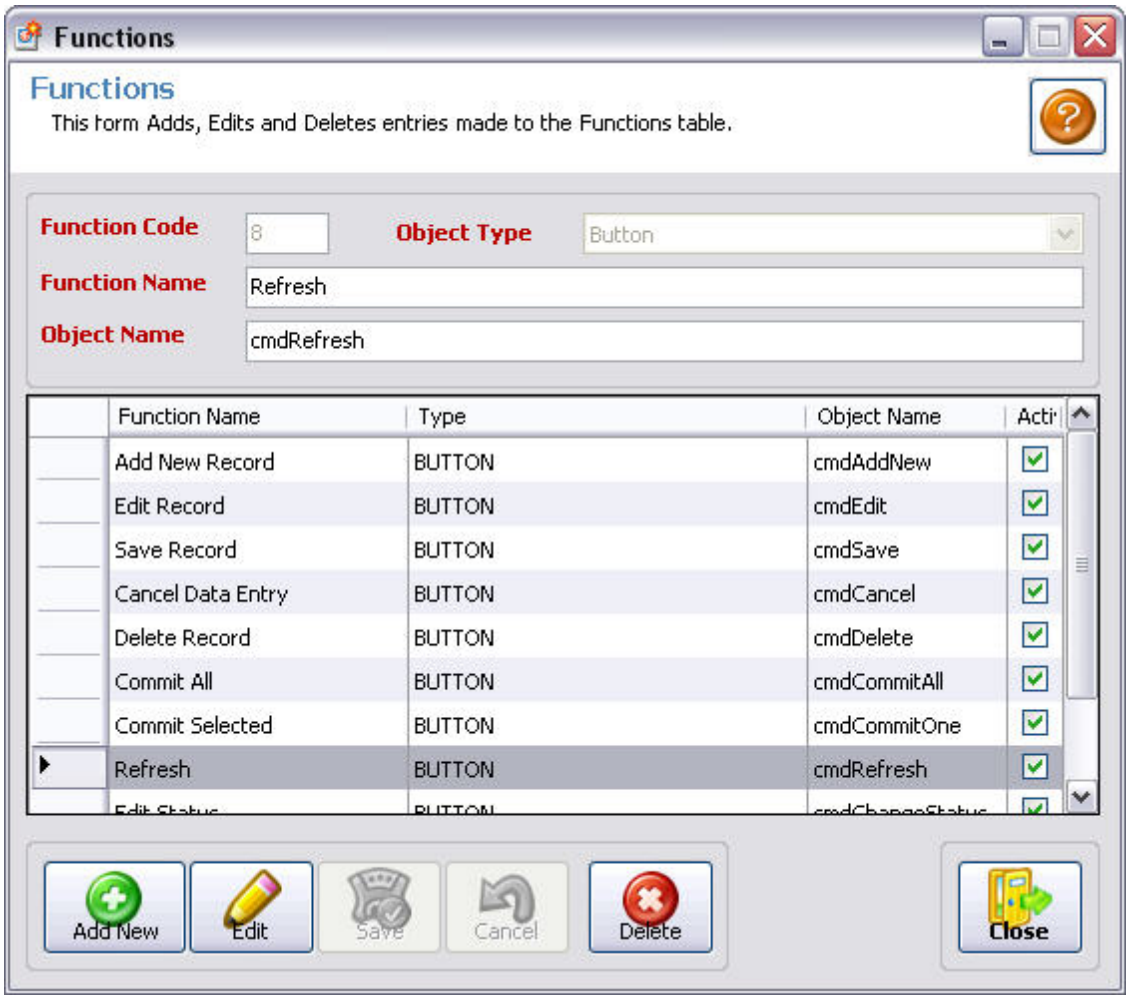
Step 6 - Click on Refresh List



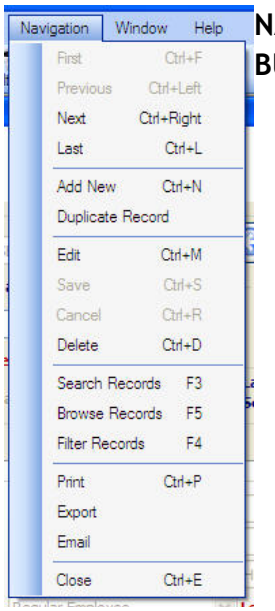
The updated information will now appear:



4.1.8.1.2 Functions



The Navigation toolbar and Menu contains functions for record navigation, record management, searching and printing to a printer, export file or email. See below for details of click on option for quick reference.



NAVIGATION BUTTONS
- o First
- o Previous
- o Next
- o Last

DATA ENTRY OPERATIONS
- o Add New
- o Duplicate
- o Edit
- o Save
- o Cancel
- o Delete
- o Cut, Copy & Paste

SEARCH OPTIONS
- o Page Size
- o Search
- o Browse
- o Filter

PRINTING
- o Print
- o Export
- o Email

NAVIGATION BUTTONS

These buttons are used to navigate records on a data entry screen.

First : First navigates to the first record in the full record (or filtered) list.
Previous : Previous navigates to one record previous to the current record on screen (like a back button). Current record -1
Next : Next navigates to one record next to the current record on screen (like a forward button). Current record +1
Last : Last navigates to the last record in the full record (or filtered) list.

CUT, COPY AND PASTE

The cut, copy and paste buttons works similar to the operations in the Windows operating system.

PAGE SIZE

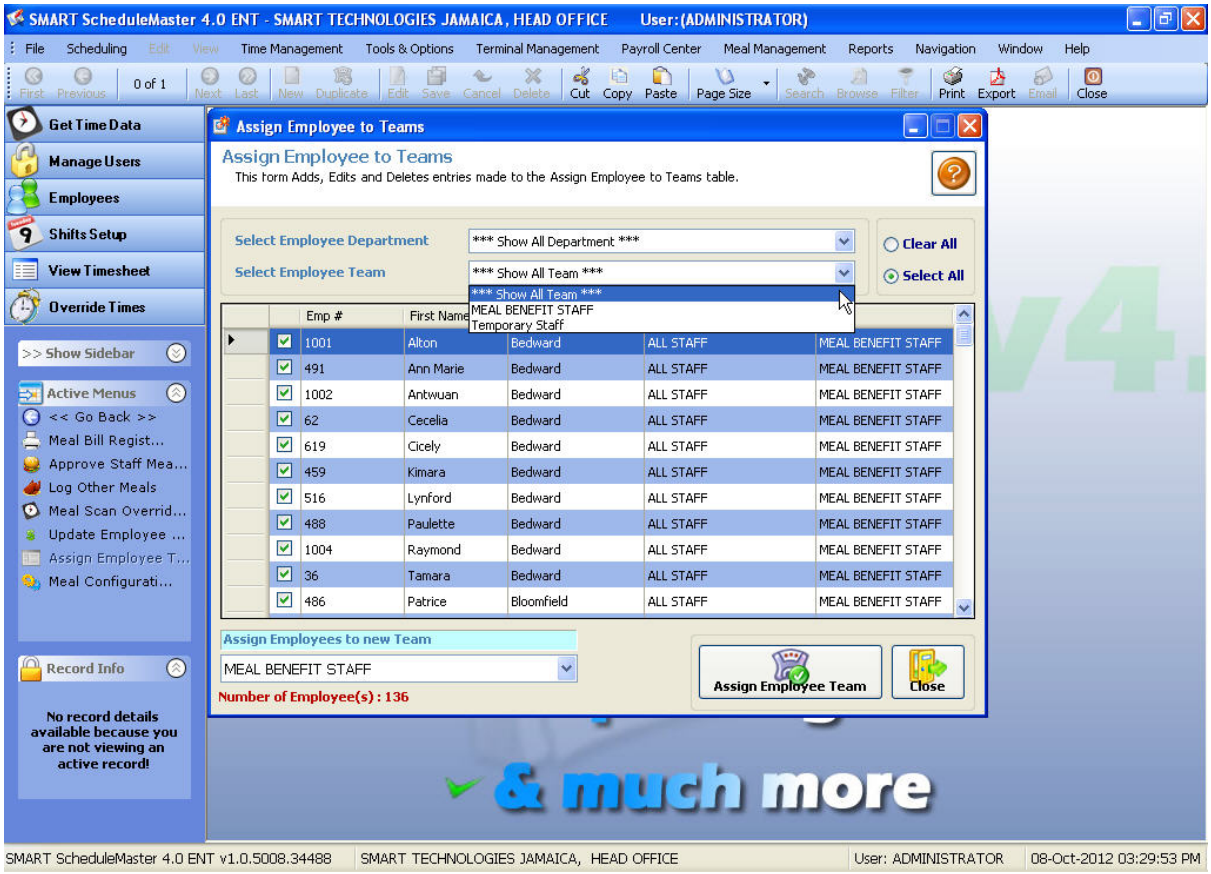
© 2014 Enter your company name

Page Size determines the maximum number of records that are retrieved from the database at any one time. This is an efficiency tool to improve performance. Eg. Opening the employee screen if set to maximum page size may pull up to 32,000 at once which may delay the application. Further, the user still have to browse, search or filter that list of find the desired record. Setting the page size to an optimal number or a low number will ensure all screens are opened promptly then the specified search will only return the desired records and not the entire record list.

Each user can set their desired page for data retrieval and it will apply to all data entry screens within the application.

HOW TO REFRESH DROP DOWN LISTS

When working in a particular screen, sometimes users will need to add/create new options within their drop down boxes. Here is an image of a screen prior to adding the new option in the drop down box:

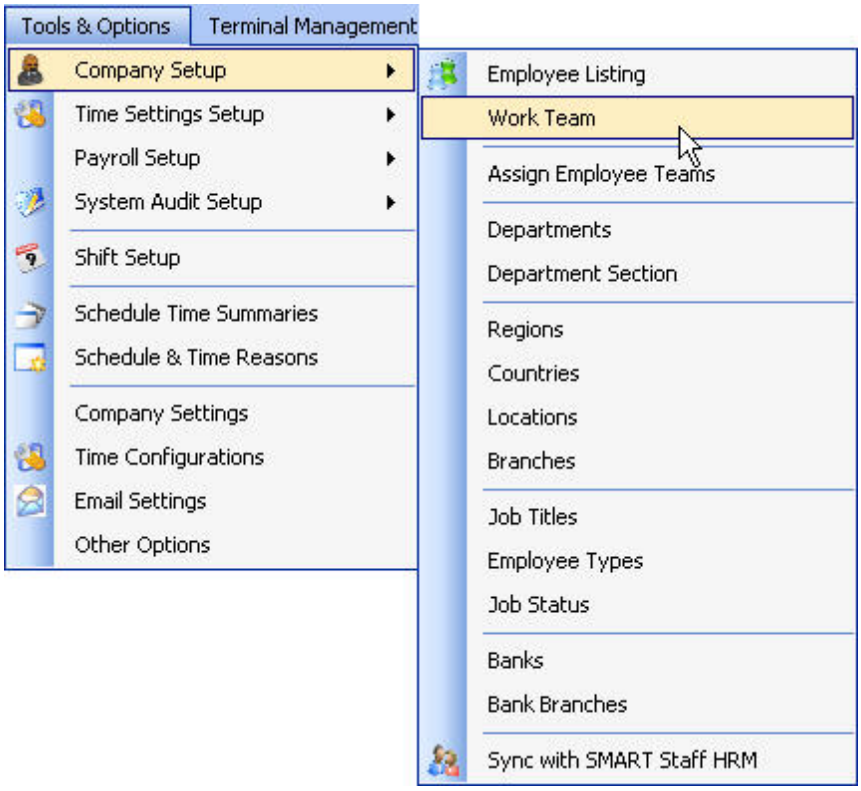


The process of adding options to a drop down box is carried out mostly in your

Maintenance Menu. The user can simply minimize the current screen and open the relevant screen in the Maintenance Menu. They then proceed to add the relevant information for the drop down box and save. Once saved, they can return to the minimized screen and Refresh the list by right clicking on the drop down box and selecting Refresh List. The following screen shots detail the process:

E.g. Adding A Work Team.

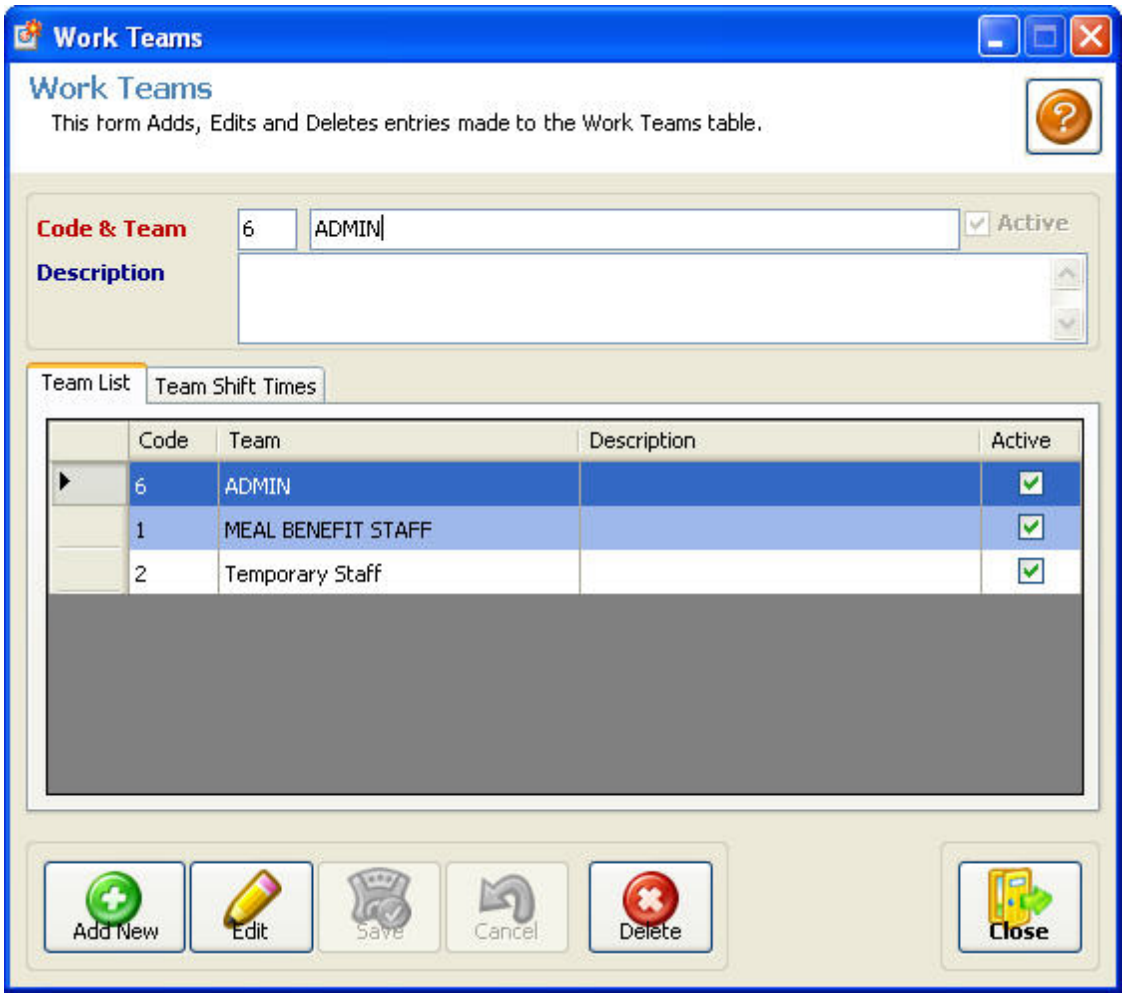
Step 1 - Minimize your current screen, then open the Work Team option in Company Setup under the Tools & Options Menu



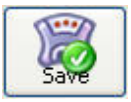
Step 2 - Click the ADD NEW button

Step 3 - Input the Code and Team Name

© 2014 Enter your company name

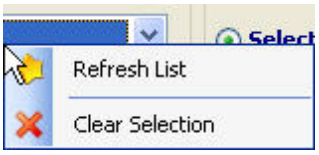


Step 4 - Save the Information

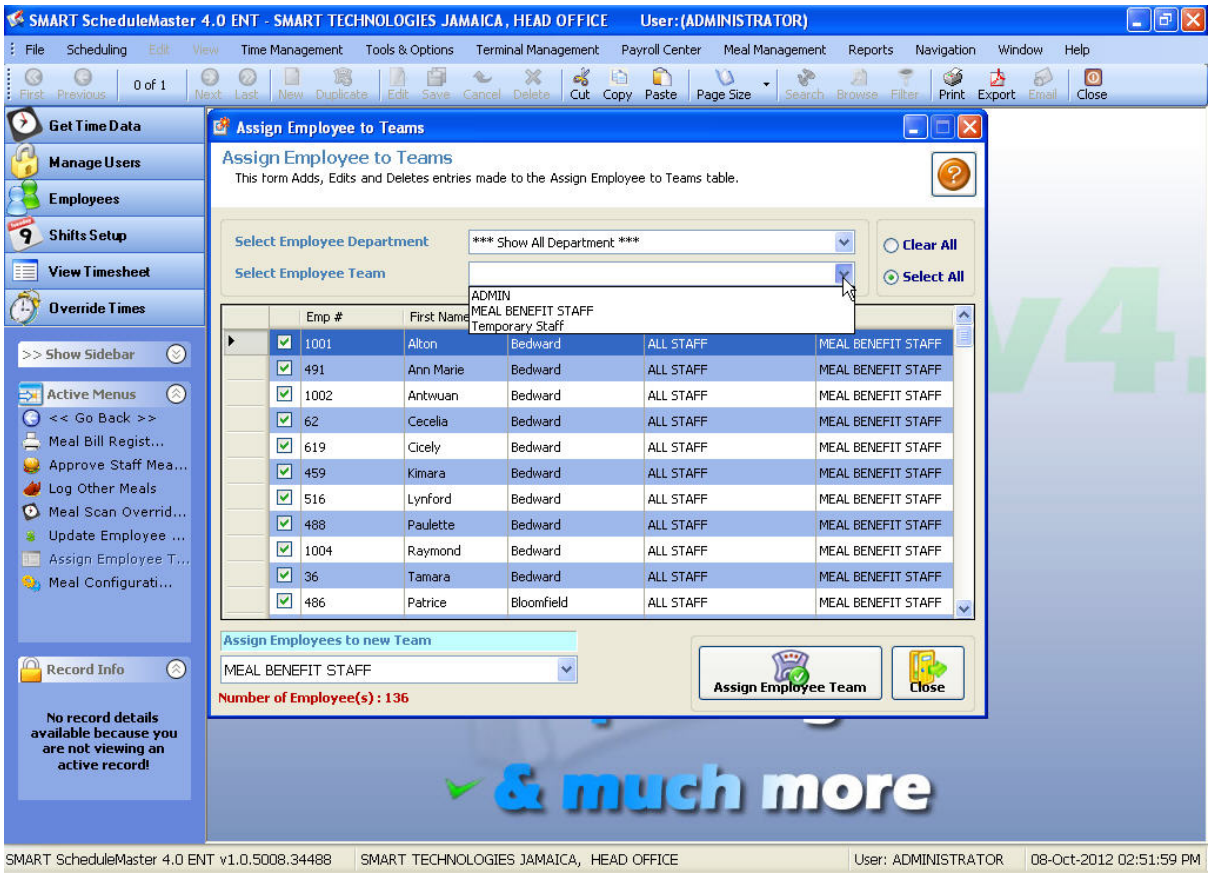


Step 5 - Return to the minimized screen and right click on the drop-down box

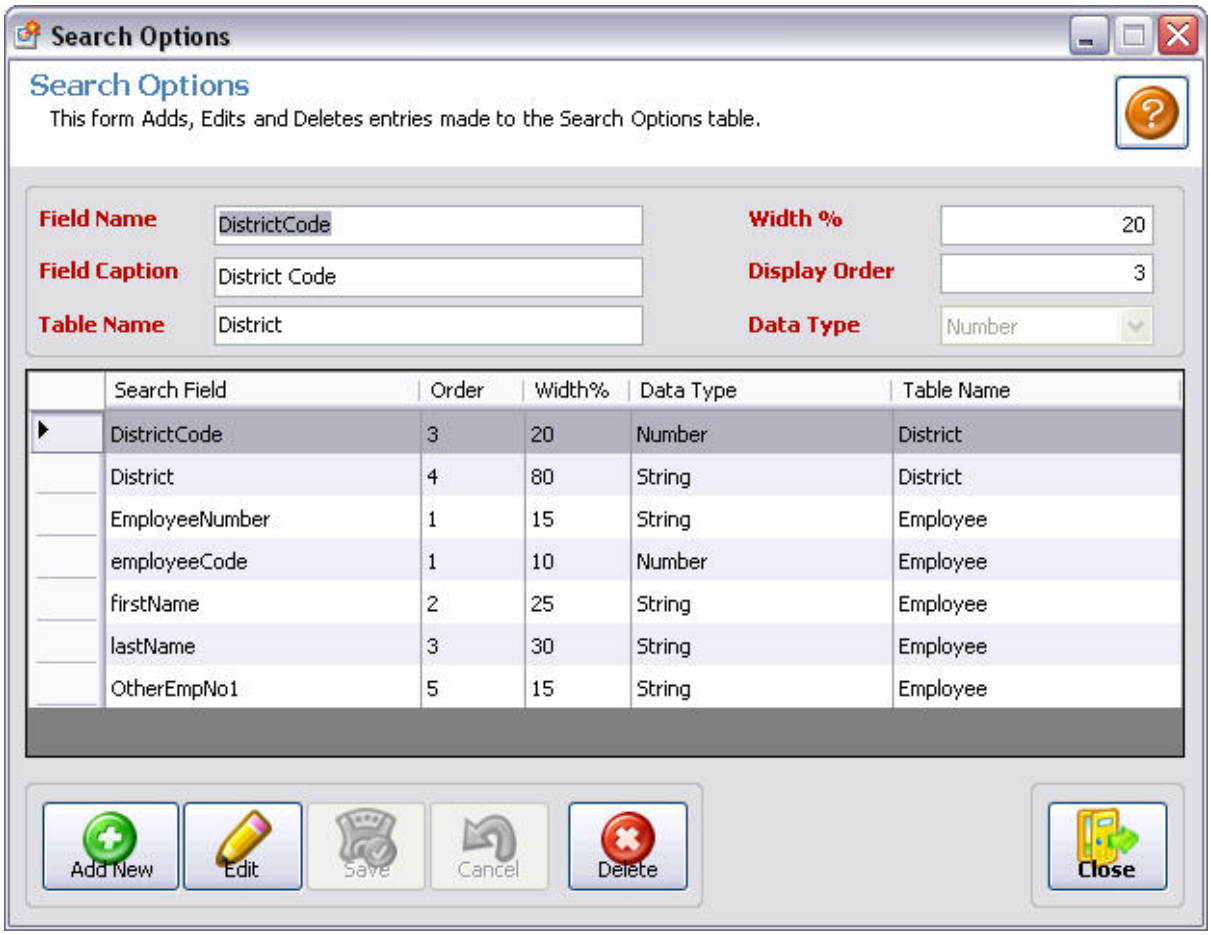
Step 6 - Click on Refresh List



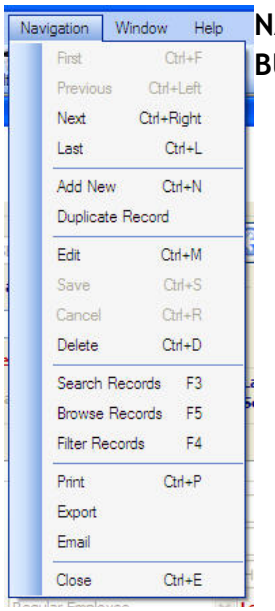
The updated information will now appear:



4.1.8.1.3 Search Options



The Navigation toolbar and Menu contains functions for record navigation, record management, searching and printing to a printer, export file or email. See below for details of click on option for quick reference.



NAVIGATION BUTTONS
- o First
- o Previous
- o Next
- o Last

DATA ENTRY OPERATIONS
- o Add New
- o Duplicate
- o Edit
- o Save
- o Cancel
- o Delete
- o Cut, Copy & Paste

SEARCH OPTIONS
- o Page Size
- o Search
- o Browse
- o Filter

PRINTING
- o Print
- o Export
- o Email

NAVIGATION BUTTONS

These buttons are used to navigate records on a data entry screen.

First : First navigates to the first record in the full record (or filtered) list.
Previous : Previous navigates to one record previous to the current record on screen (like a back button). Current record -1
Next : Next navigates to one record next to the current record on screen (like a forward button). Current record +1
Last : Last navigates to the last record in the full record (or filtered) list.

CUT, COPY AND PASTE

The cut, copy and paste buttons works similar to the operations in the Windows operating system.

PAGE SIZE

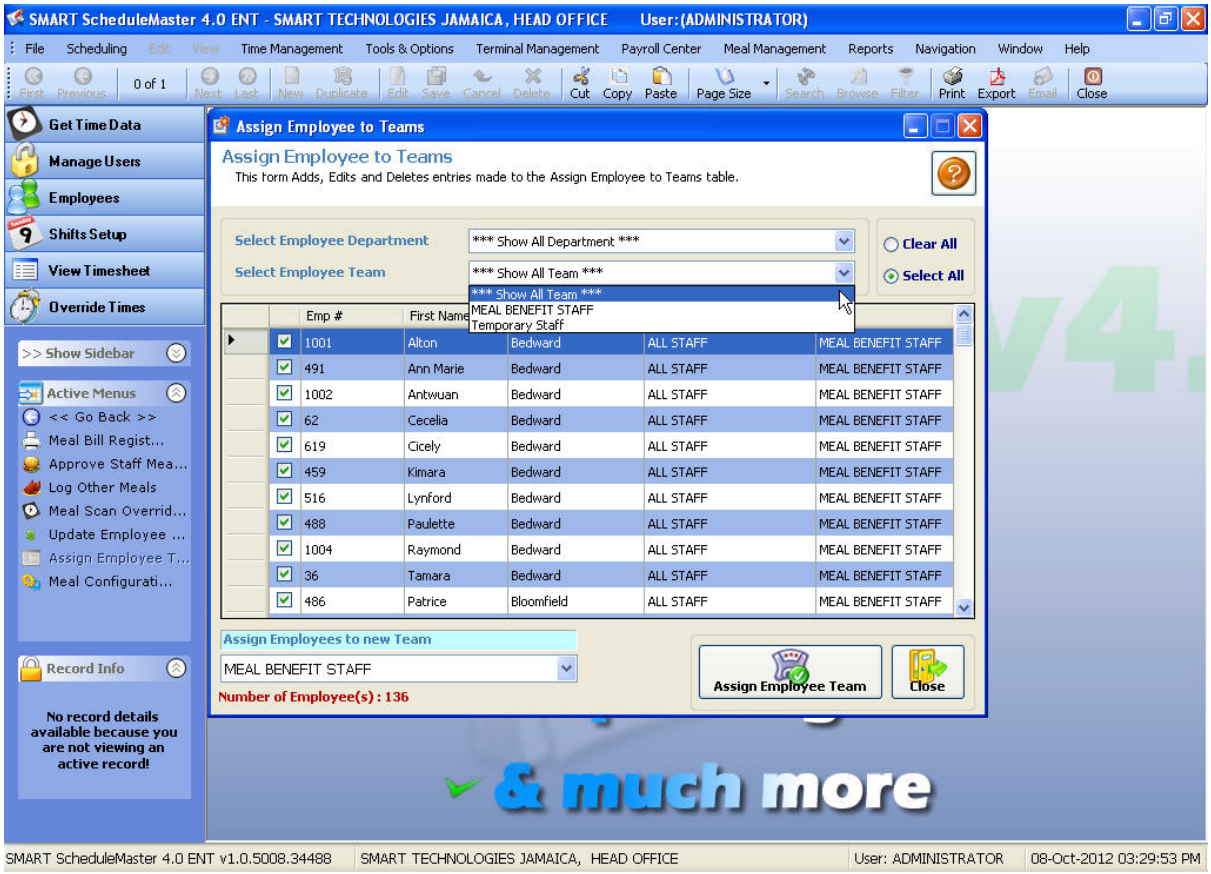
© 2014 Enter your company name

Page Size determines the maximum number of records that are retrieved from the database at any one time. This is an efficiency tool to improve performance. Eg. Opening the employee screen if set to maximum page size may pull up to 32,000 at once which may delay the application. Further, the user still have to browse, search or filter that list of find the desired record. Setting the page size to an optimal number or a low number will ensure all screens are opened promptly then the specified search will only return the desired records and not the entire record list.

Each user can set their desired page for data retrieval and it will apply to all data entry screens within the application.

HOW TO REFRESH DROP DOWN LISTS

When working in a particular screen, sometimes users will need to add/create new options within their drop down boxes. Here is an image of a screen prior to adding the new option in the drop down box:

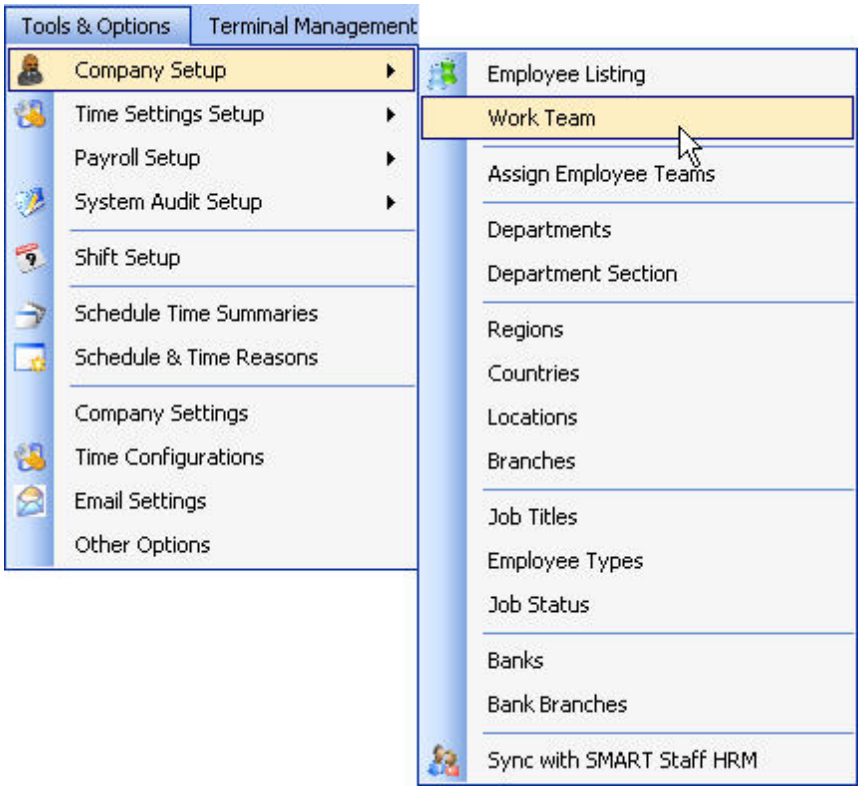


The process of adding options to a drop down box is carried out mostly in your

Maintenance Menu. The user can simply minimize the current screen and open the relevant screen in the Maintenance Menu. They then proceed to add the relevant information for the drop down box and save. Once saved, they can return to the minimized screen and Refresh the list by right clicking on the drop down box and selecting Refresh List. The following screen shots detail the process:

E.g. Adding A Work Team.

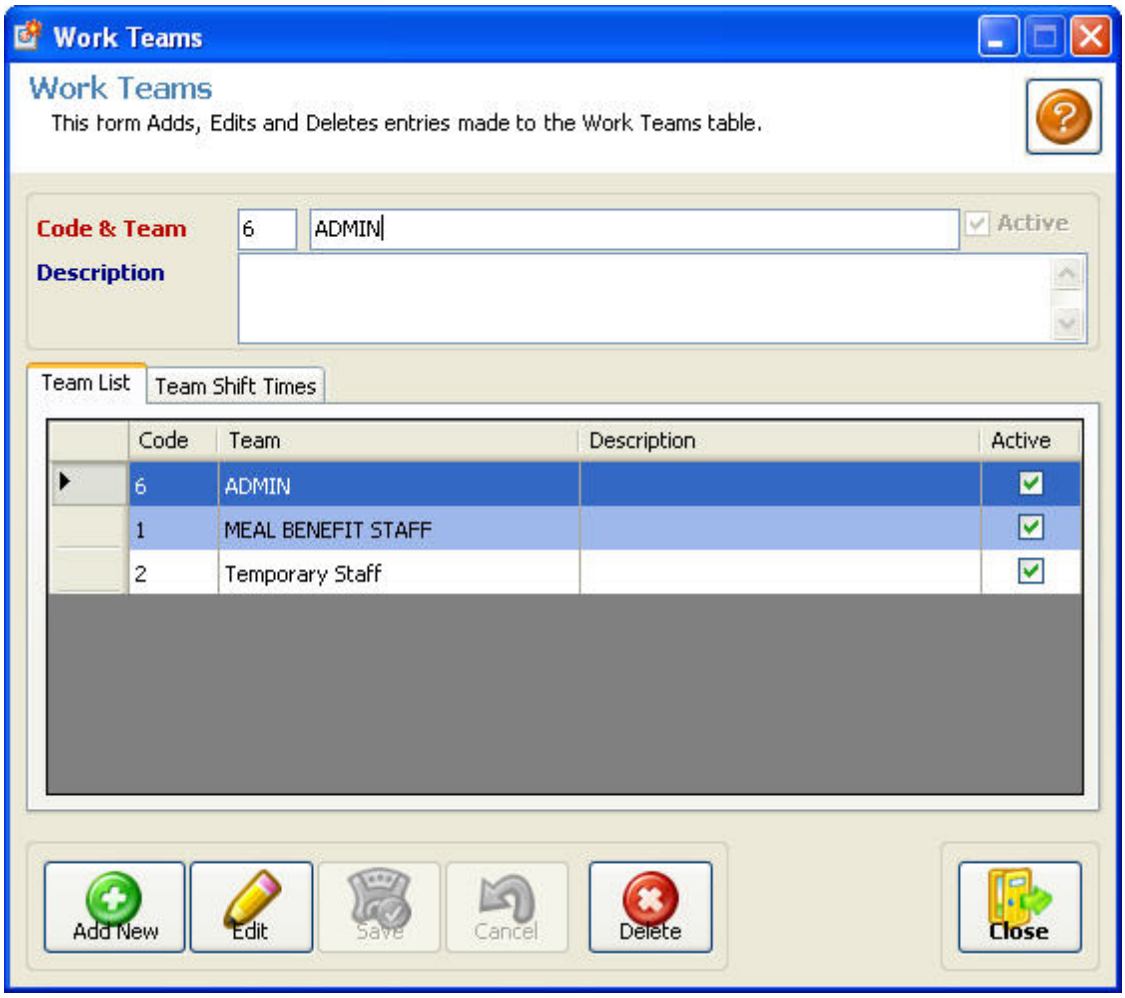
Step 1 - Minimize your current screen, then open the Work Team option in Company Setup under the Tools & Options Menu



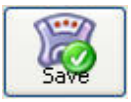
Step 2 - Click the ADD NEW button

Step 3 - Input the Code and Team Name

© 2014 Enter your company name

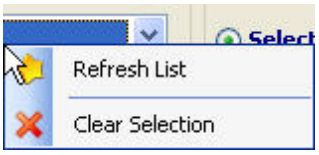


Step 4 - Save the Information

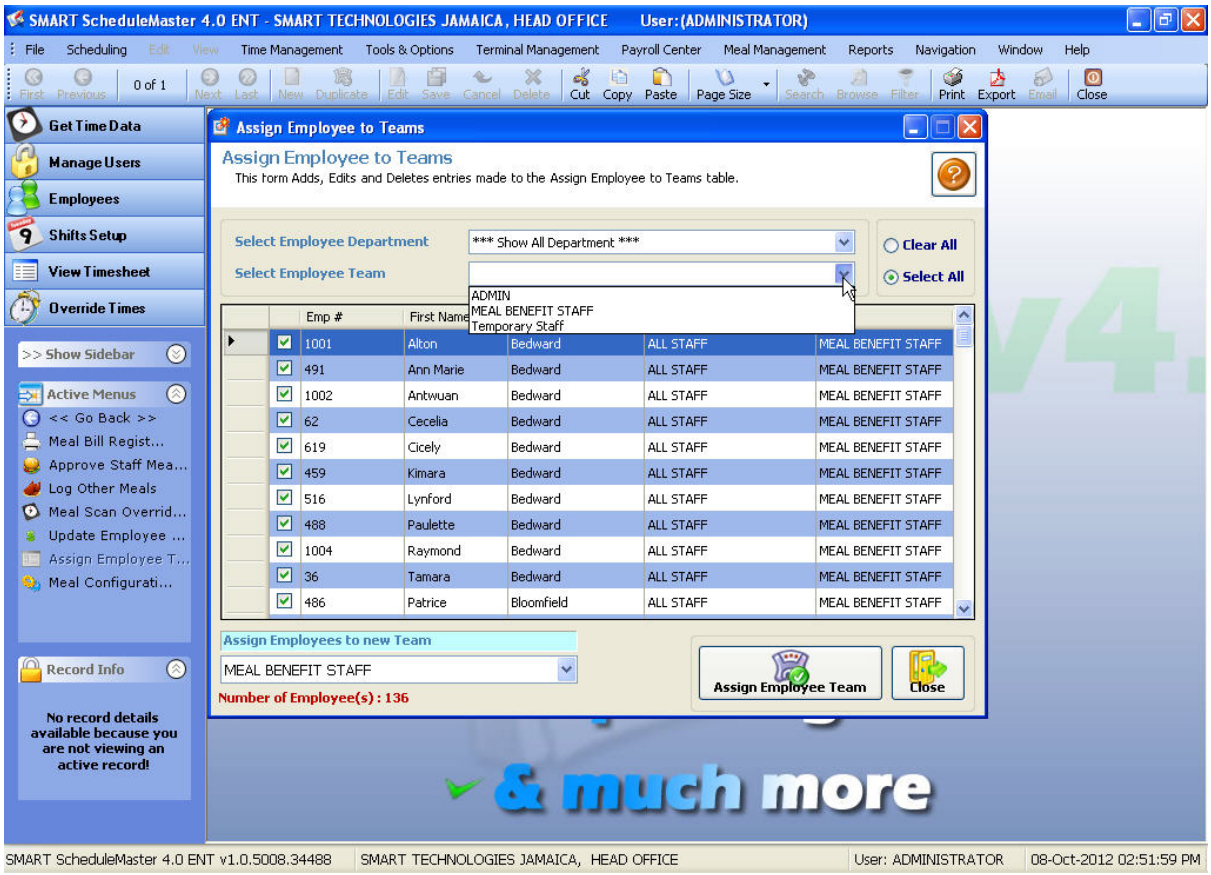


Step 5 - Return to the minimized screen and right click on the drop-down box

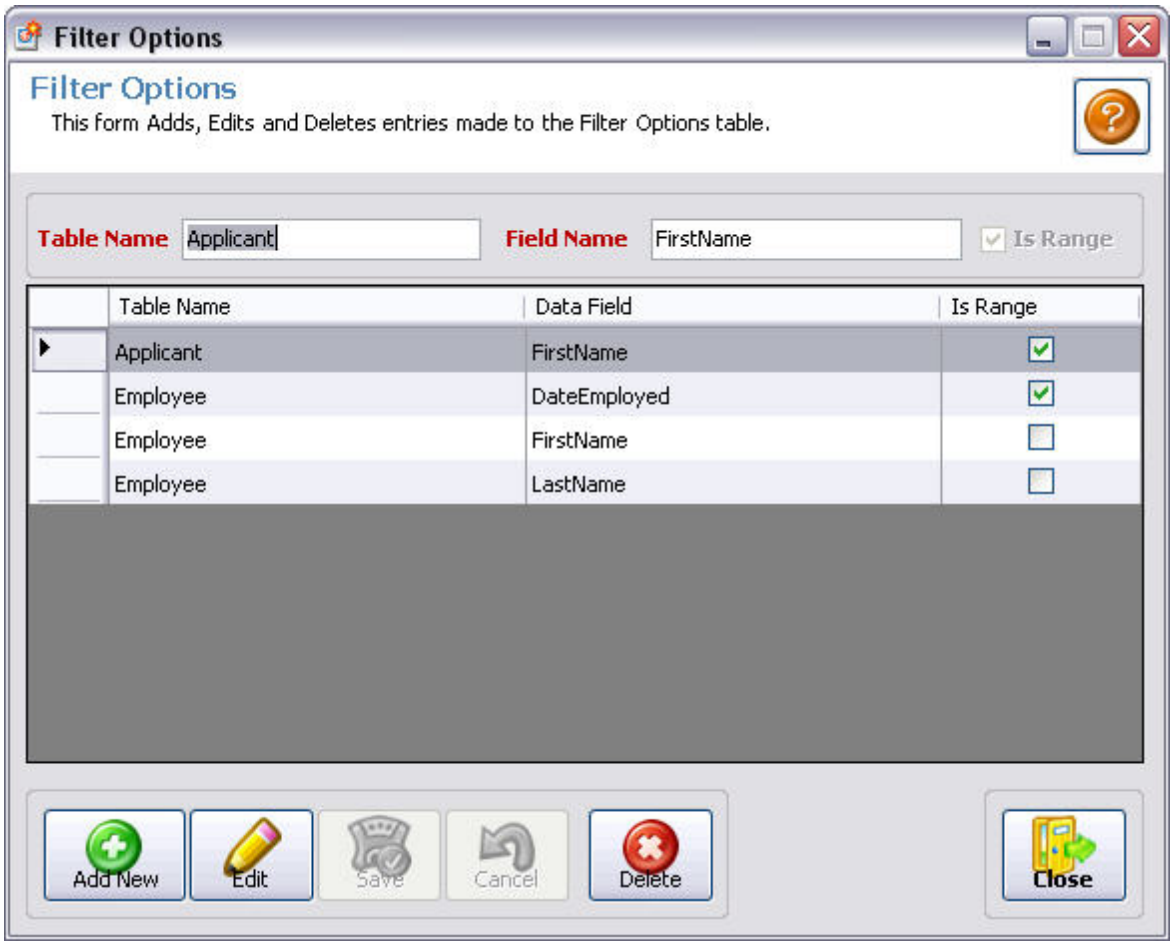
Step 6 - Click on Refresh List



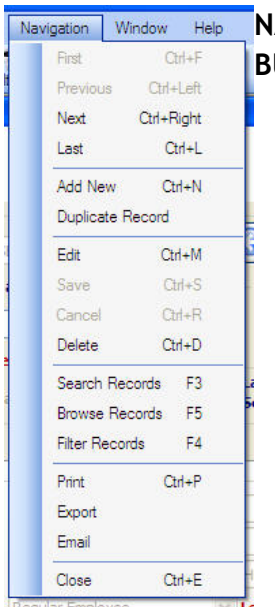
The updated information will now appear:



4.1.8.1.4 Filter Options



The Navigation toolbar and Menu contains functions for record navigation, record management, searching and printing to a printer, export file or email. See below for details of click on option for quick reference.



NAVIGATION BUTTONS
- o First
- o Previous
- o Next
- o Last

DATA ENTRY OPERATIONS
- o Add New
- o Duplicate
- o Edit
- o Save
- o Cancel
- o Delete
- o Cut, Copy & Paste

SEARCH OPTIONS
- o Page Size
- o Search
- o Browse
- o Filter

PRINTING
- o Print
- o Export
- o Email

NAVIGATION BUTTONS

These buttons are used to navigate records on a data entry screen.

First : First navigates to the first record in the full record (or filtered) list.
Previous : Previous navigates to one record previous to the current record on screen (like a back button). Current record -1
Next : Next navigates to one record next to the current record on screen (like a forward button). Current record +1
Last : Last navigates to the last record in the full record (or filtered) list.

CUT, COPY AND PASTE

The cut, copy and paste buttons works similar to the operations in the Windows operating system.

PAGE SIZE

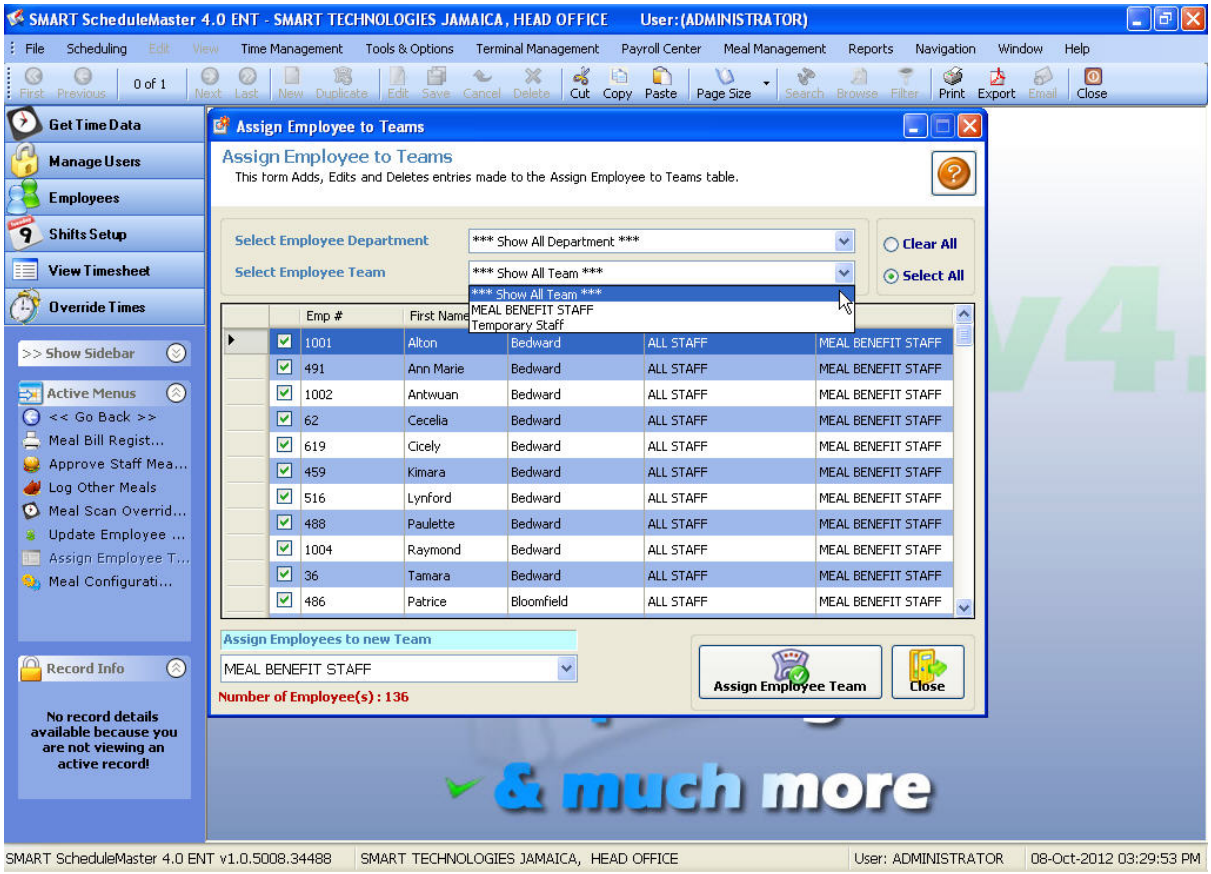
© 2014 Enter your company name

Page Size determines the maximum number of records that are retrieved from the database at any one time. This is an efficiency tool to improve performance. Eg. Opening the employee screen if set to maximum page size may pull up to 32,000 at once which may delay the application. Further, the user still have to browse, search or filter that list of find the desired record. Setting the page size to an optimal number or a low number will ensure all screens are opened promptly then the specified search will only return the desired records and not the entire record list.

Each user can set their desired page for data retrieval and it will apply to all data entry screens within the application.

HOW TO REFRESH DROP DOWN LISTS

When working in a particular screen, sometimes users will need to add/create new options within their drop down boxes. Here is an image of a screen prior to adding the new option in the drop down box:

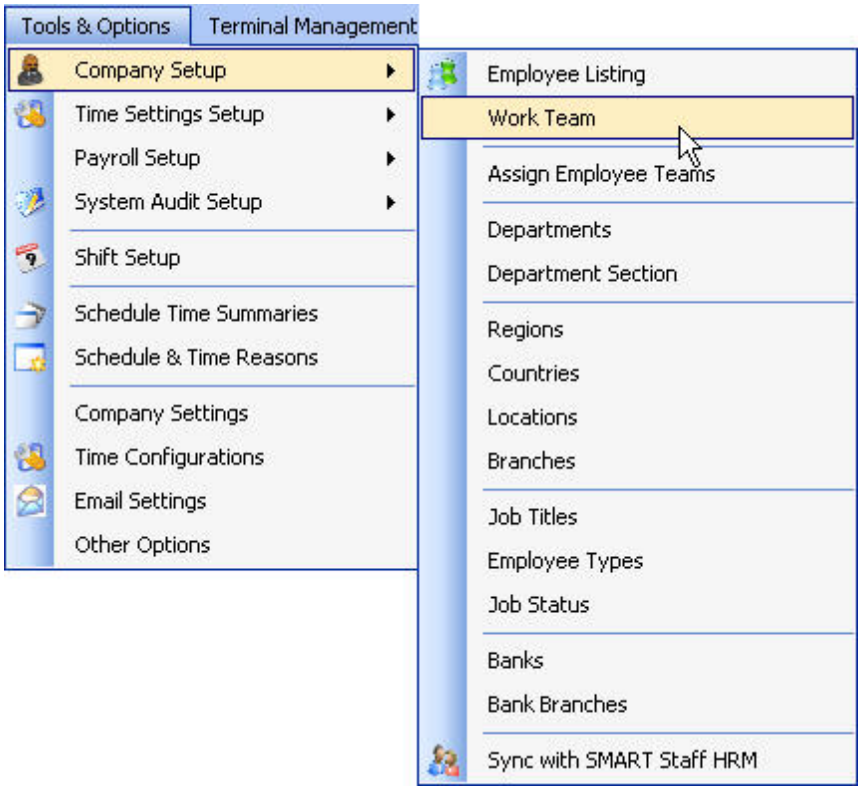


The process of adding options to a drop down box is carried out mostly in your

Maintenance Menu. The user can simply minimize the current screen and open the relevant screen in the Maintenance Menu. They then proceed to add the relevant information for the drop down box and save. Once saved, they can return to the minimized screen and Refresh the list by right clicking on the drop down box and selecting Refresh List. The following screen shots detail the process:

E.g. Adding A Work Team.

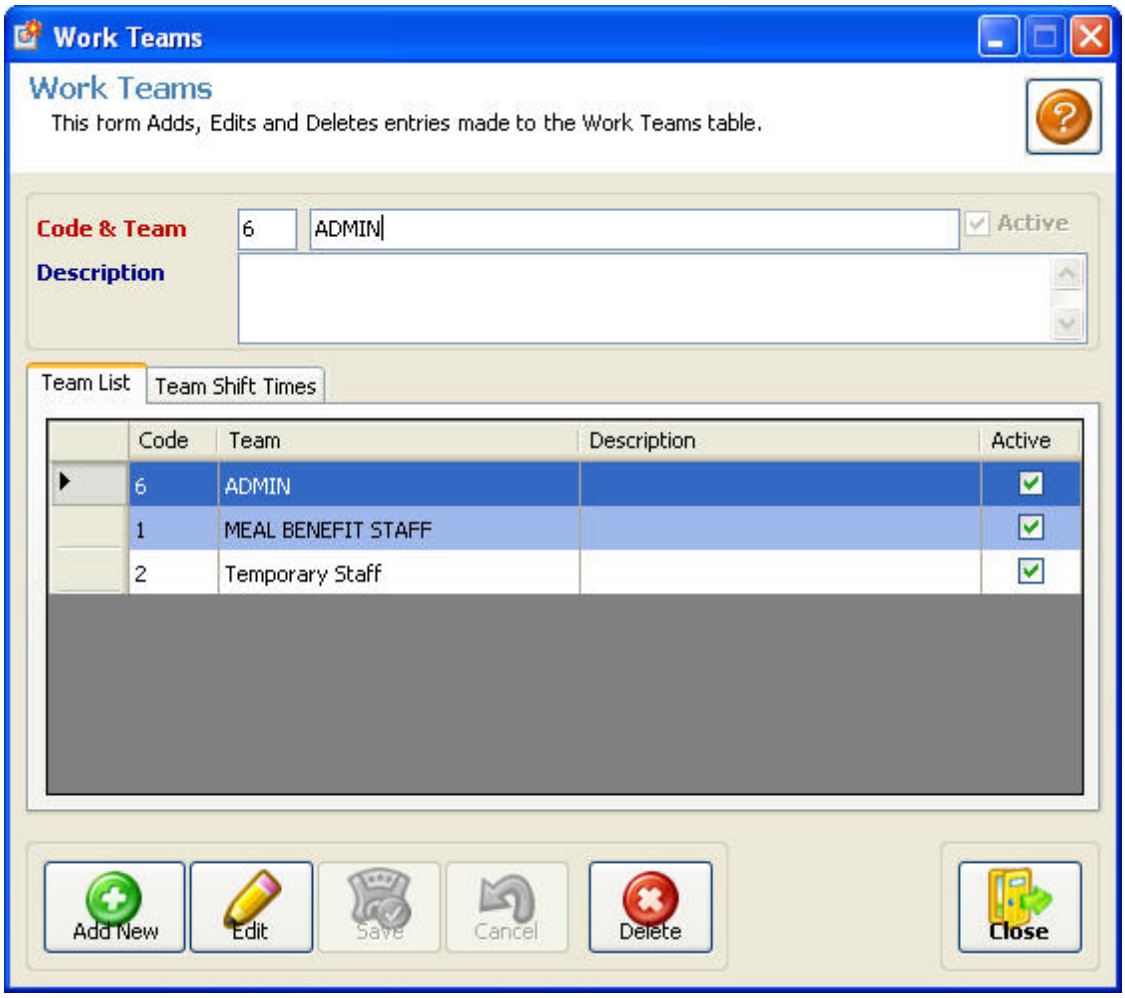
Step 1 - Minimize your current screen, then open the Work Team option in Company Setup under the Tools & Options Menu



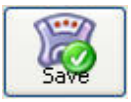
Step 2 - Click the ADD NEW button

Step 3 - Input the Code and Team Name

© 2014 Enter your company name

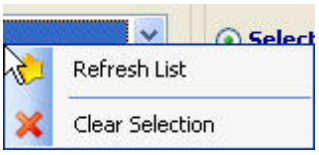


Step 4 - Save the Information

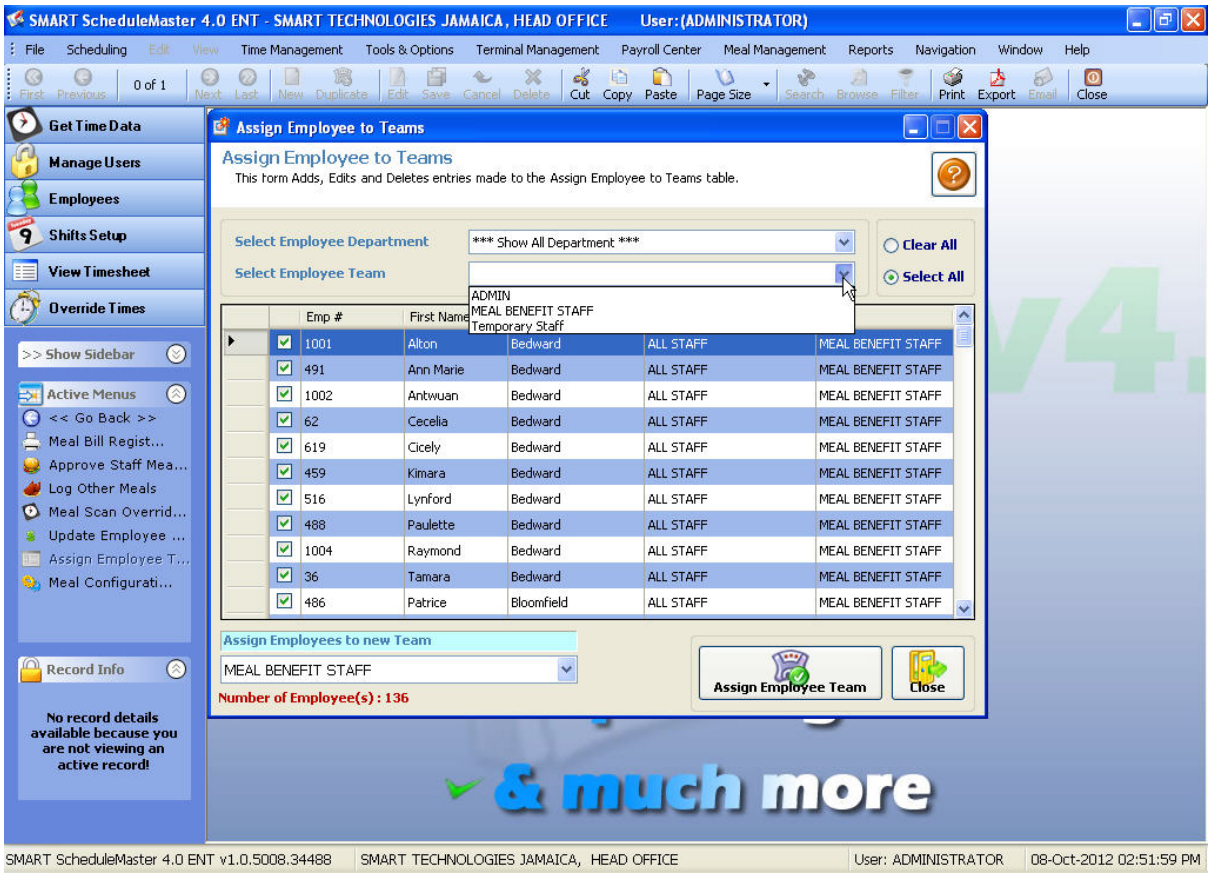


Step 5 - Return to the minimized screen and right click on the drop-down box

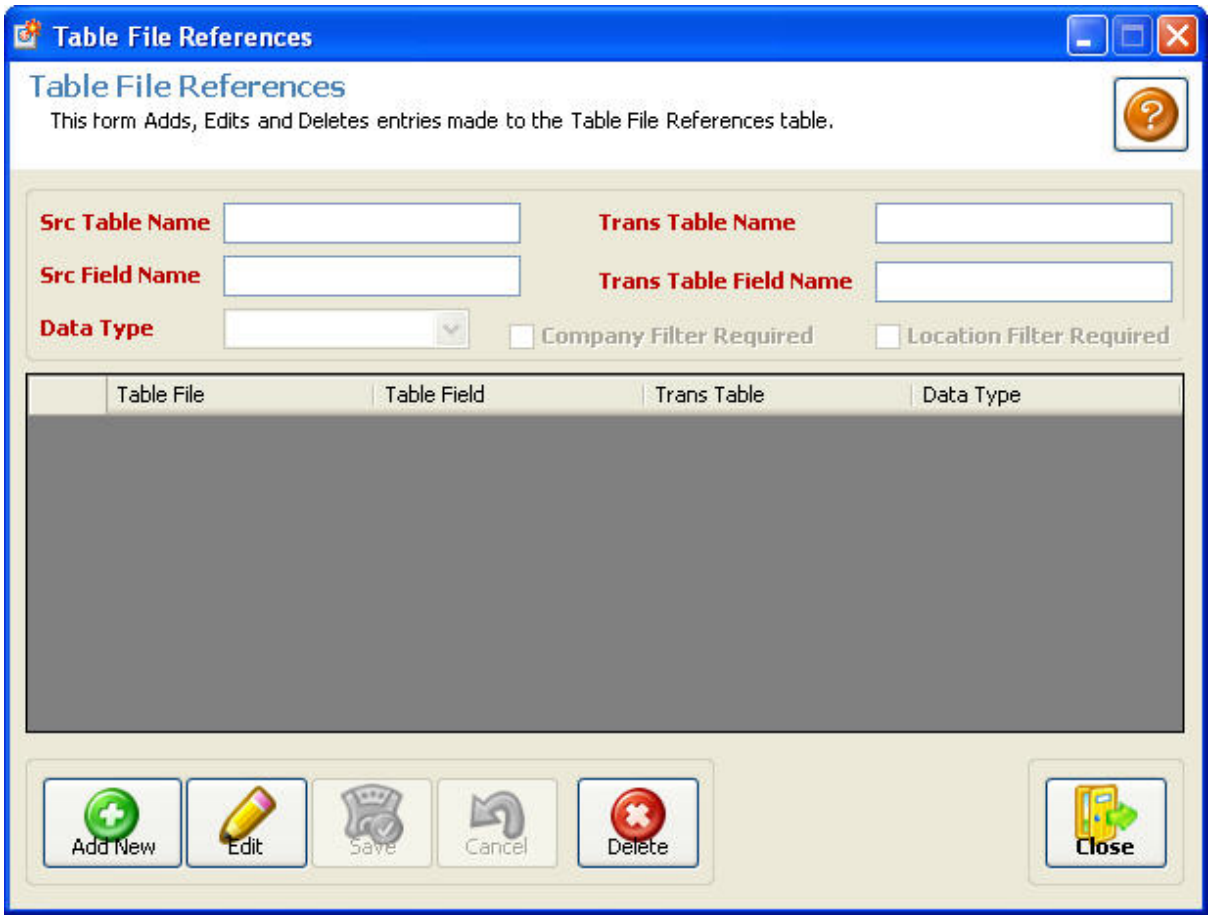
Step 6 - Click on Refresh List



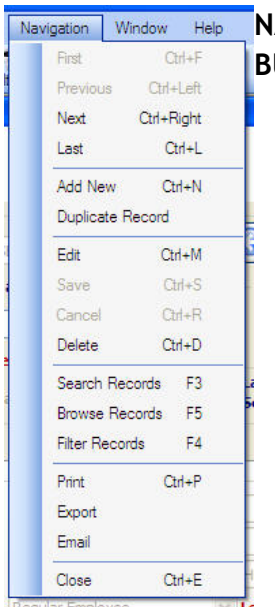
The updated information will now appear:



4.1.8.1.5 Trans. Table Refs



The Navigation toolbar and Menu contains functions for record navigation, record management, searching and printing to a printer, export file or email. See below for details of click on option for quick reference.



NAVIGATION BUTTONS
- o First
- o Previous
- o Next
- o Last

DATA ENTRY OPERATIONS
- o Add New
- o Duplicate
- o Edit
- o Save
- o Cancel
- o Delete
- o Cut, Copy & Paste

SEARCH OPTIONS
- o Page Size
- o Search
- o Browse
- o Filter

PRINTING
- o Print
- o Export
- o Email

NAVIGATION BUTTONS

These buttons are used to navigate records on a data entry screen.

First : First navigates to the first record in the full record (or filtered) list.
Previous : Previous navigates to one record previous to the current record on screen (like a back button). Current record -1
Next : Next navigates to one record next to the current record on screen (like a forward button). Current record +1
Last : Last navigates to the last record in the full record (or filtered) list.

CUT, COPY AND PASTE

The cut, copy and paste buttons works similar to the operations in the Windows operating system.

PAGE SIZE

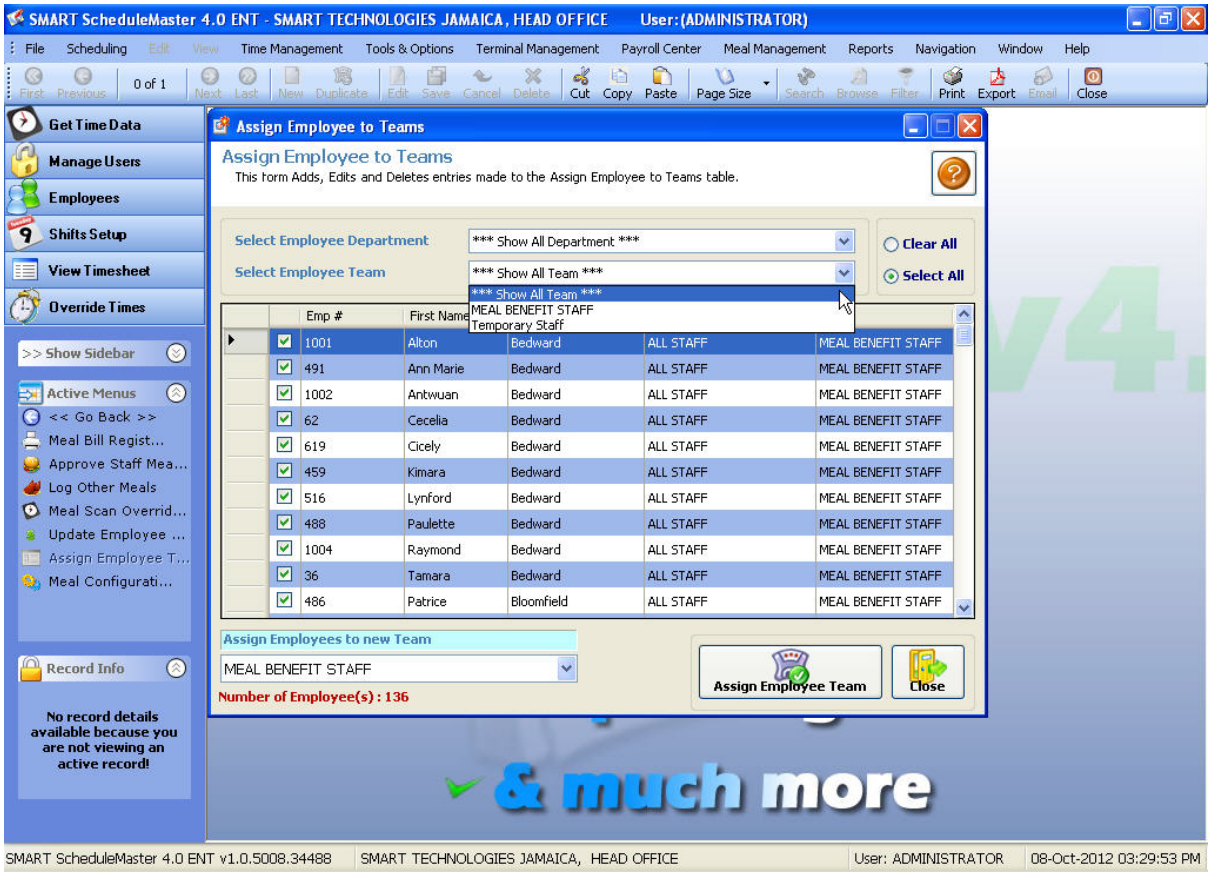
© 2014 Enter your company name

Page Size determines the maximum number of records that are retrieved from the database at any one time. This is an efficiency tool to improve performance. Eg. Opening the employee screen if set to maximum page size may pull up to 32,000 at once which may delay the application. Further, the user still have to browse, search or filter that list of find the desired record. Setting the page size to an optimal number or a low number will ensure all screens are opened promptly then the specified search will only return the desired records and not the entire record list.

Each user can set their desired page for data retrieval and it will apply to all data entry screens within the application.

HOW TO REFRESH DROP DOWN LISTS

When working in a particular screen, sometimes users will need to add/create new options within their drop down boxes. Here is an image of a screen prior to adding the new option in the drop down box:

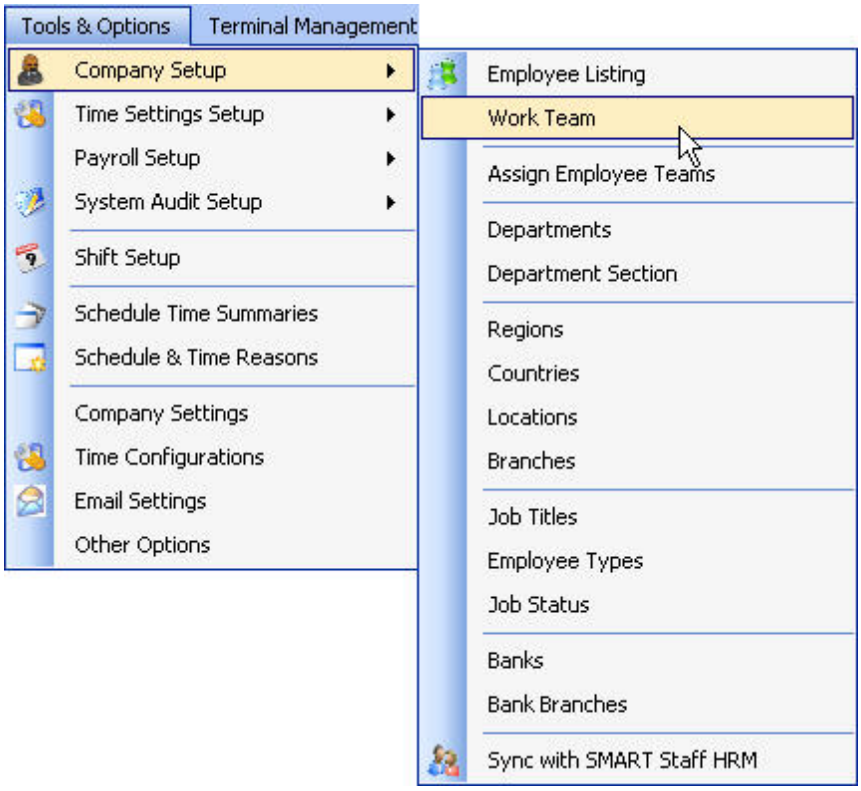


The process of adding options to a drop down box is carried out mostly in your

Maintenance Menu. The user can simply minimize the current screen and open the relevant screen in the Maintenance Menu. They then proceed to add the relevant information for the drop down box and save. Once saved, they can return to the minimized screen and Refresh the list by right clicking on the drop down box and selecting Refresh List. The following screen shots detail the process:

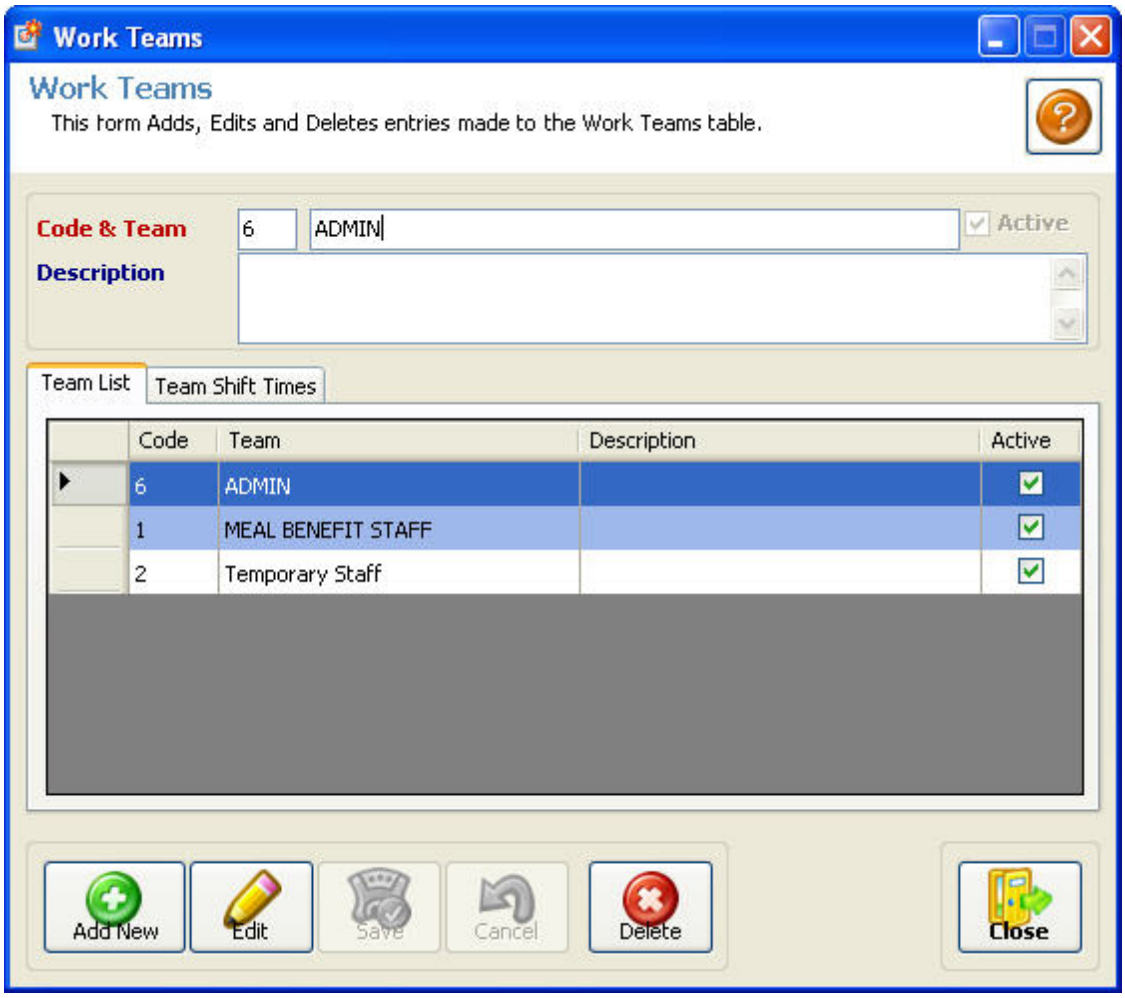
E.g. Adding A Work Team.

Step 1 - Minimize your current screen, then open the Work Team option in Company Setup under the Tools & Options Menu

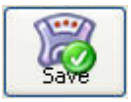


Step 2 - Click the ADD NEW button

Step 3 - Input the Code and Team Name

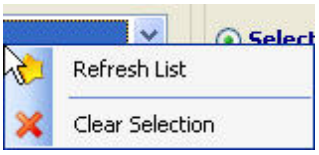


Step 4 - Save the Information

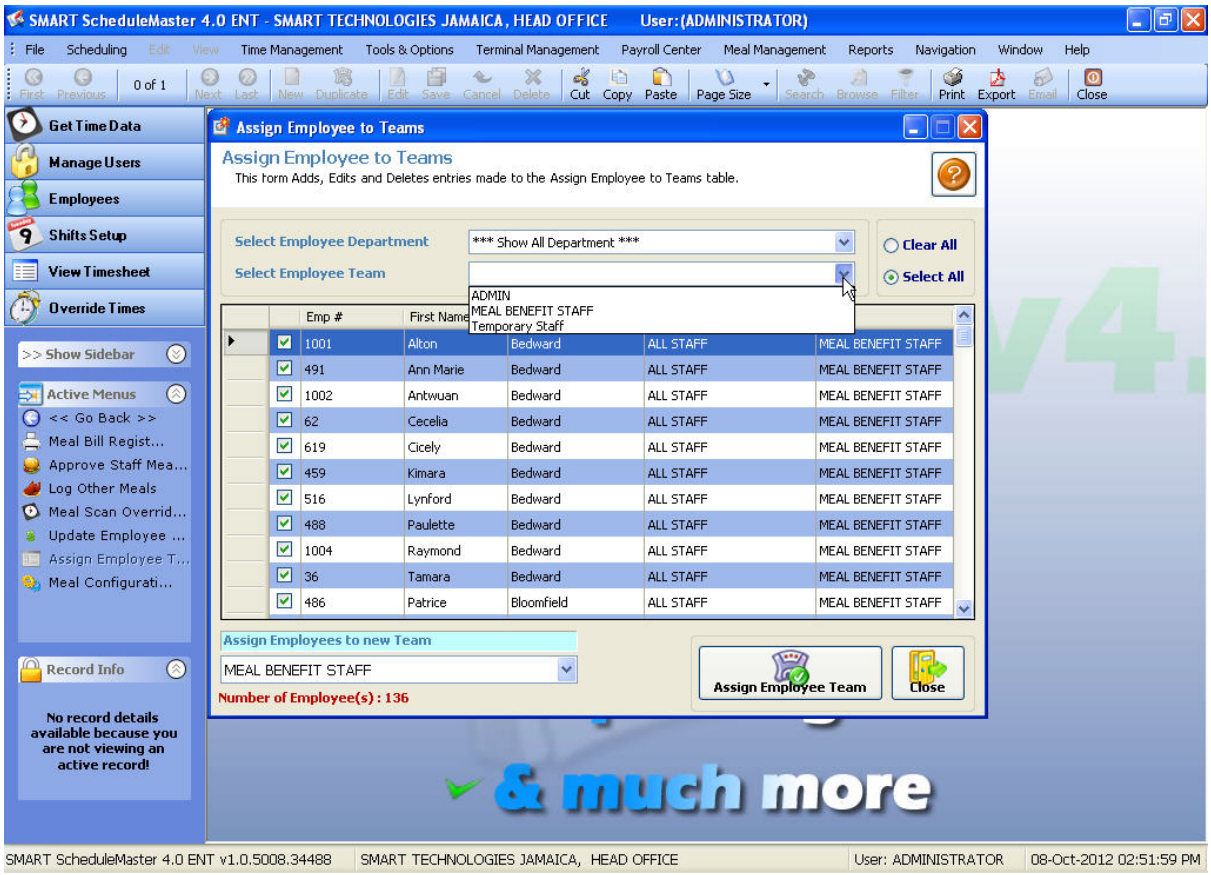


Step 5 - Return to the minimized screen and right click on the drop-down box

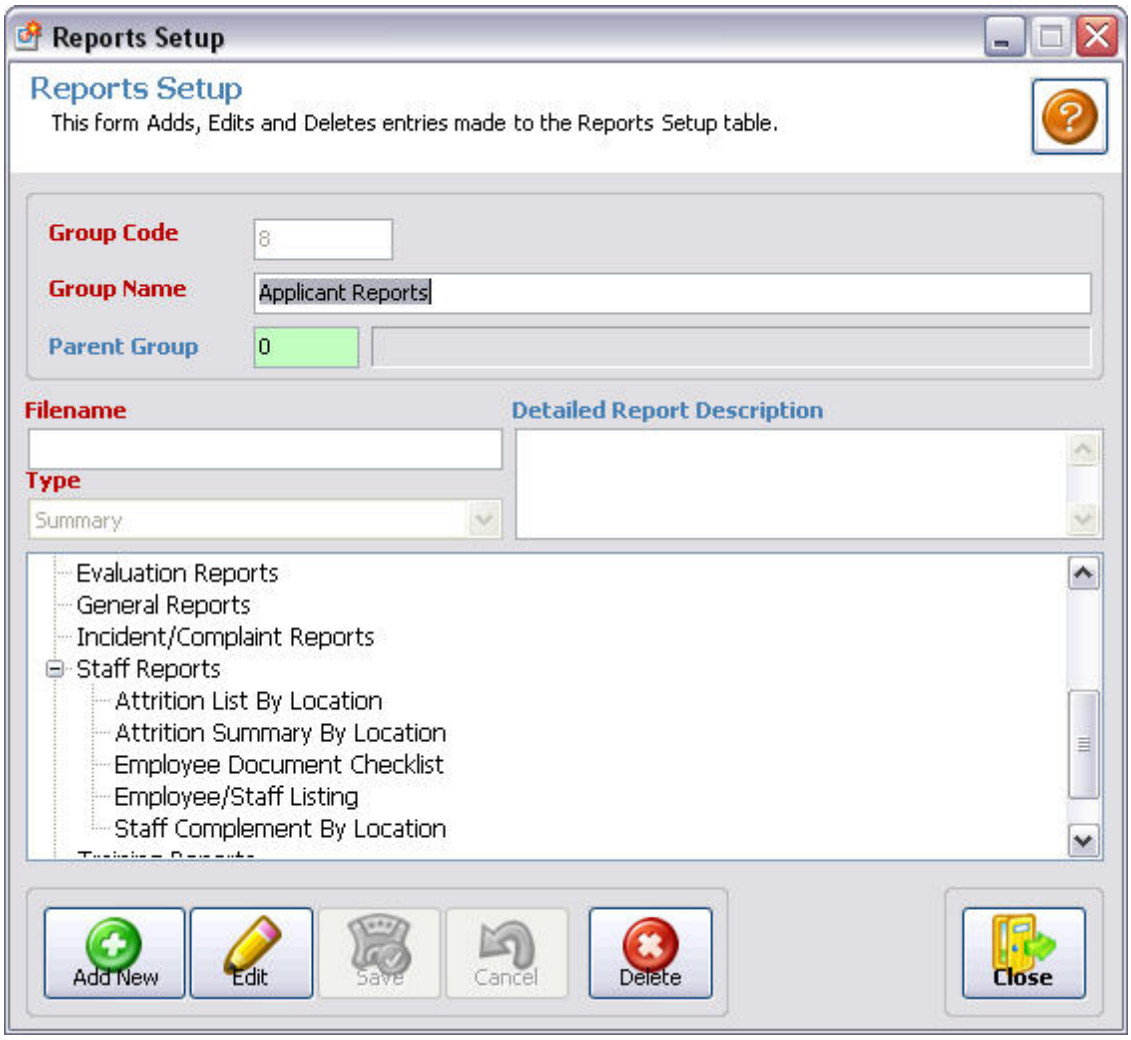
Step 6 - Click on Refresh List



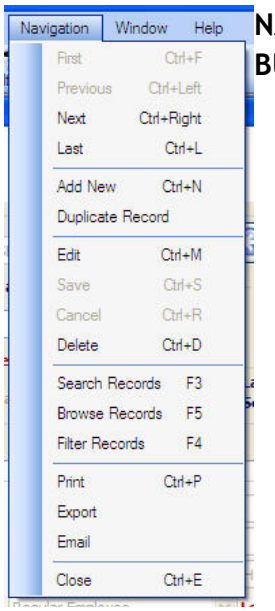
The updated information will now appear:



4.1.8.1.6 Reports Setup



The Navigation toolbar and Menu contains functions for record navigation, record management, searching and printing to a printer, export file or email. See below for details of click on option for quick reference.



NAVIGATION BUTTONS
- o First
- o Previous
- o Next
- o Last

DATA ENTRY OPERATIONS
- o Add New
- o Duplicate
- o Edit
- o Save
- o Cancel
- o Delete
- o Cut, Copy & Paste

SEARCH OPTIONS
- o Page Size
- o Search
- o Browse
- o Filter

PRINTING
- o Print
- o Export
- o Email

NAVIGATION BUTTONS

These buttons are used to navigate records on a data entry screen.

First : First navigates to the first record in the full record (or filtered) list.
Previous : Previous navigates to one record previous to the current record on screen (like a back button). Current record -1
Next : Next navigates to one record next to the current record on screen (like a forward button). Current record +1
Last : Last navigates to the last record in the full record (or filtered) list.

CUT, COPY AND PASTE

The cut, copy and paste buttons works similar to the operations in the Windows operating system.

PAGE SIZE

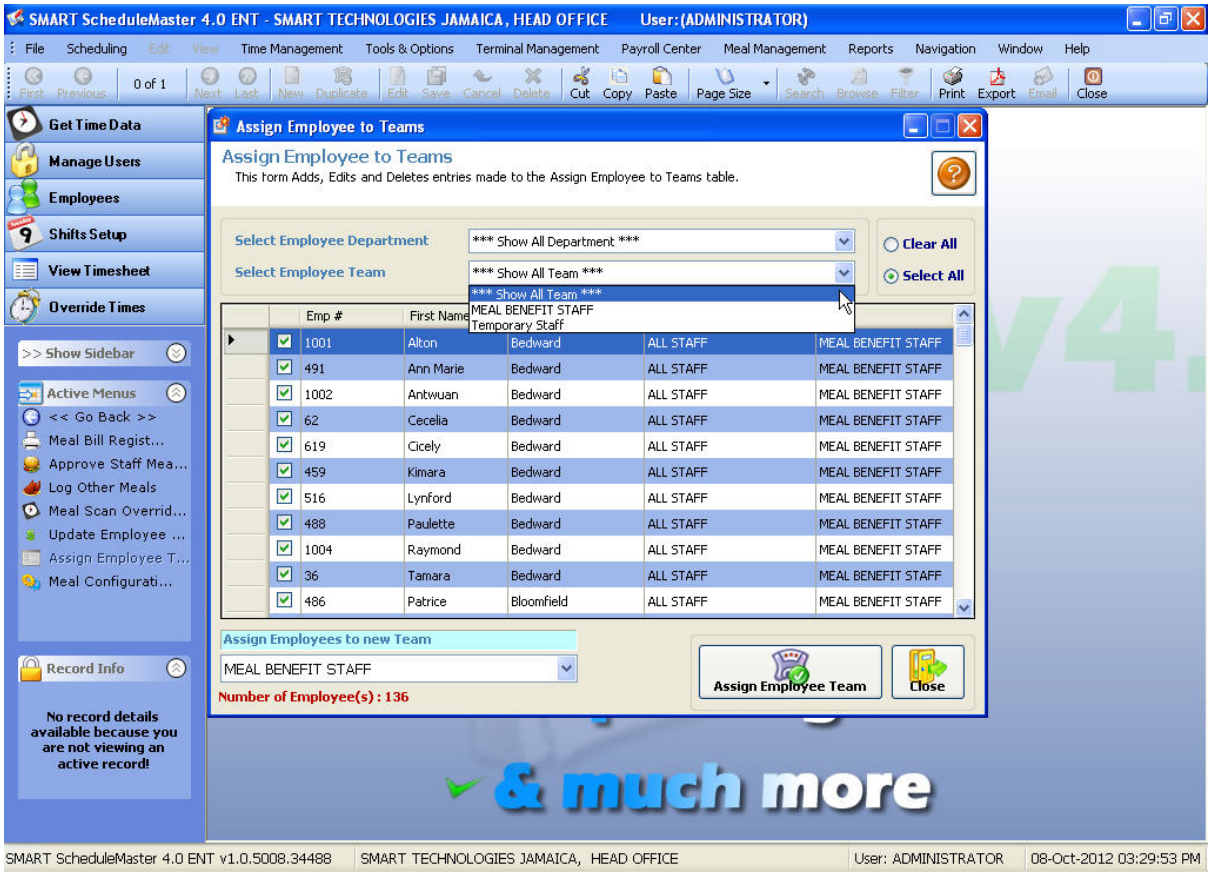
© 2014 Enter your company name

Page Size determines the maximum number of records that are retrieved from the database at any one time. This is an efficiency tool to improve performance. Eg. Opening the employee screen if set to maximum page size may pull up to 32,000 at once which may delay the application. Further, the user still have to browse, search or filter that list of find the desired record. Setting the page size to an optimal number or a low number will ensure all screens are opened promptly then the specified search will only return the desired records and not the entire record list.

Each user can set their desired page for data retrieval and it will apply to all data entry screens within the application.

HOW TO REFRESH DROP DOWN LISTS

When working in a particular screen, sometimes users will need to add/create new options within their drop down boxes. Here is an image of a screen prior to adding the new option in the drop down box:

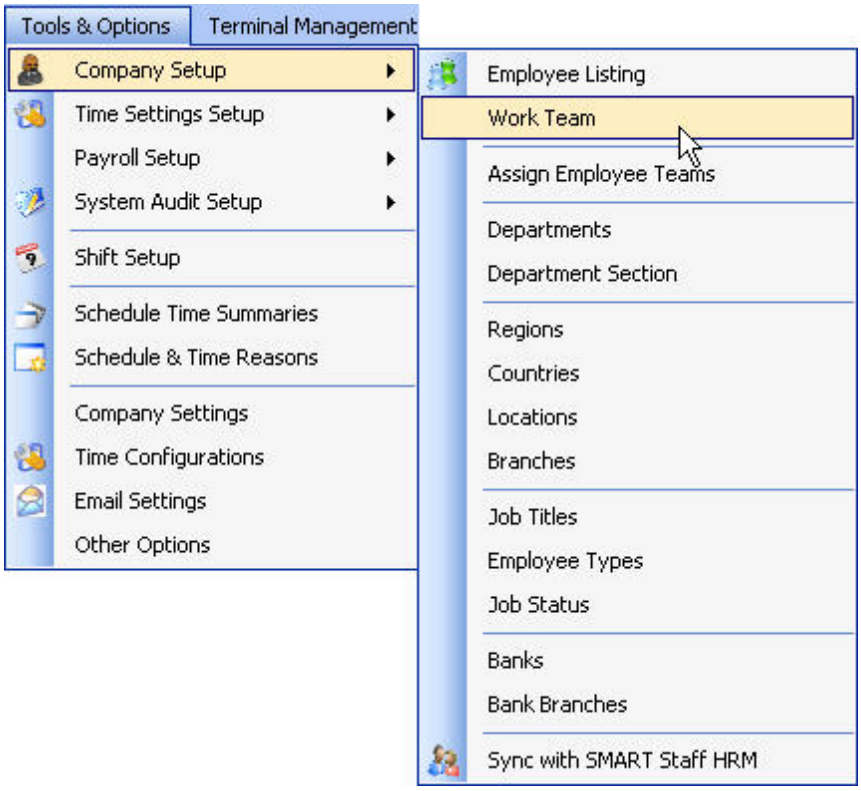


The process of adding options to a drop down box is carried out mostly in your

Maintenance Menu. The user can simply minimize the current screen and open the relevant screen in the Maintenance Menu. They then proceed to add the relevant information for the drop down box and save. Once saved, they can return to the minimized screen and Refresh the list by right clicking on the drop down box and selecting Refresh List. The following screen shots detail the process:

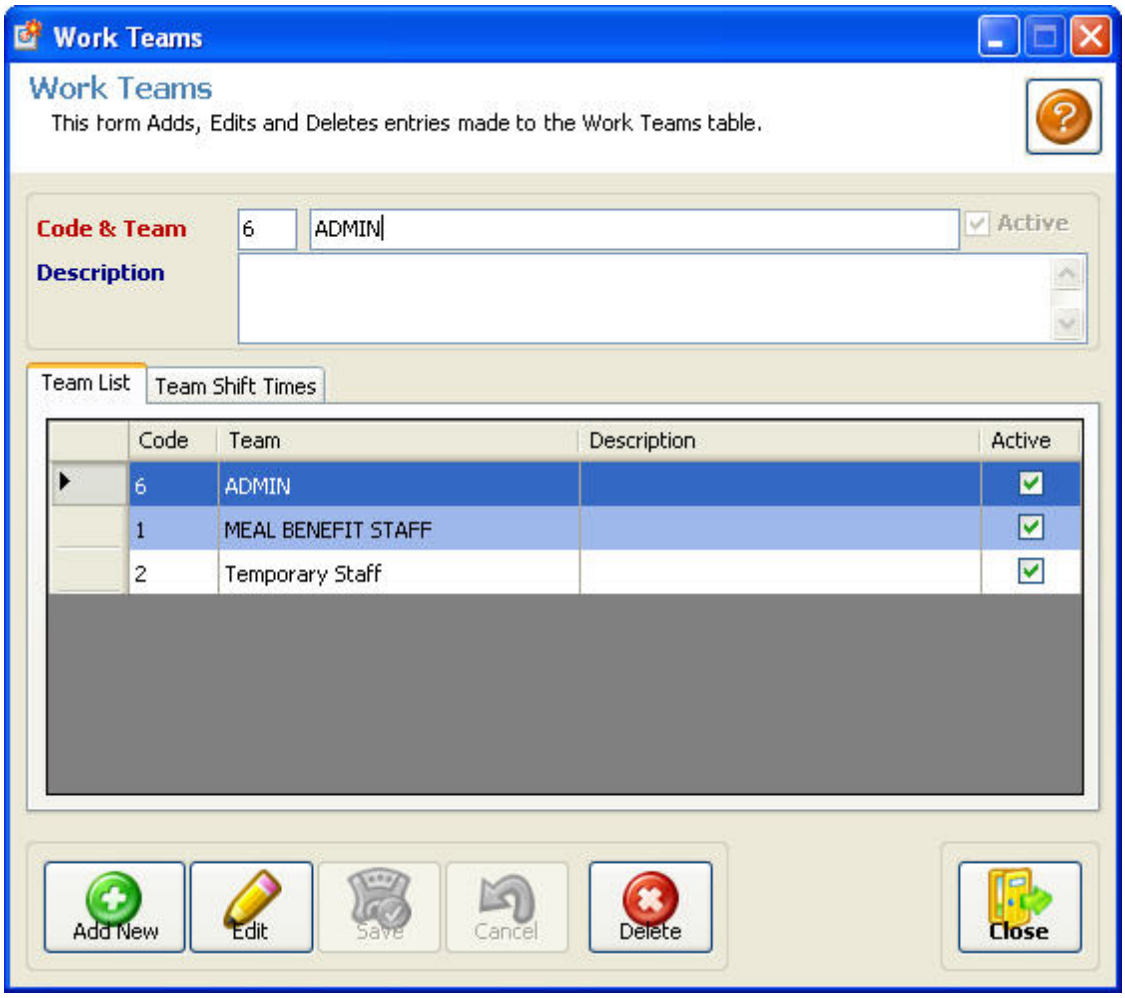
E.g. Adding A Work Team.

Step 1 - Minimize your current screen, then open the Work Team option in Company Setup under the Tools & Options Menu

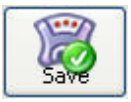


Step 2 - Click the ADD NEW button

Step 3 - Input the Code and Team Name

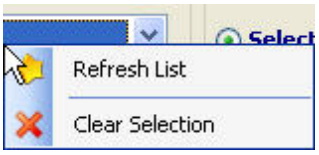


Step 4 - Save the Information

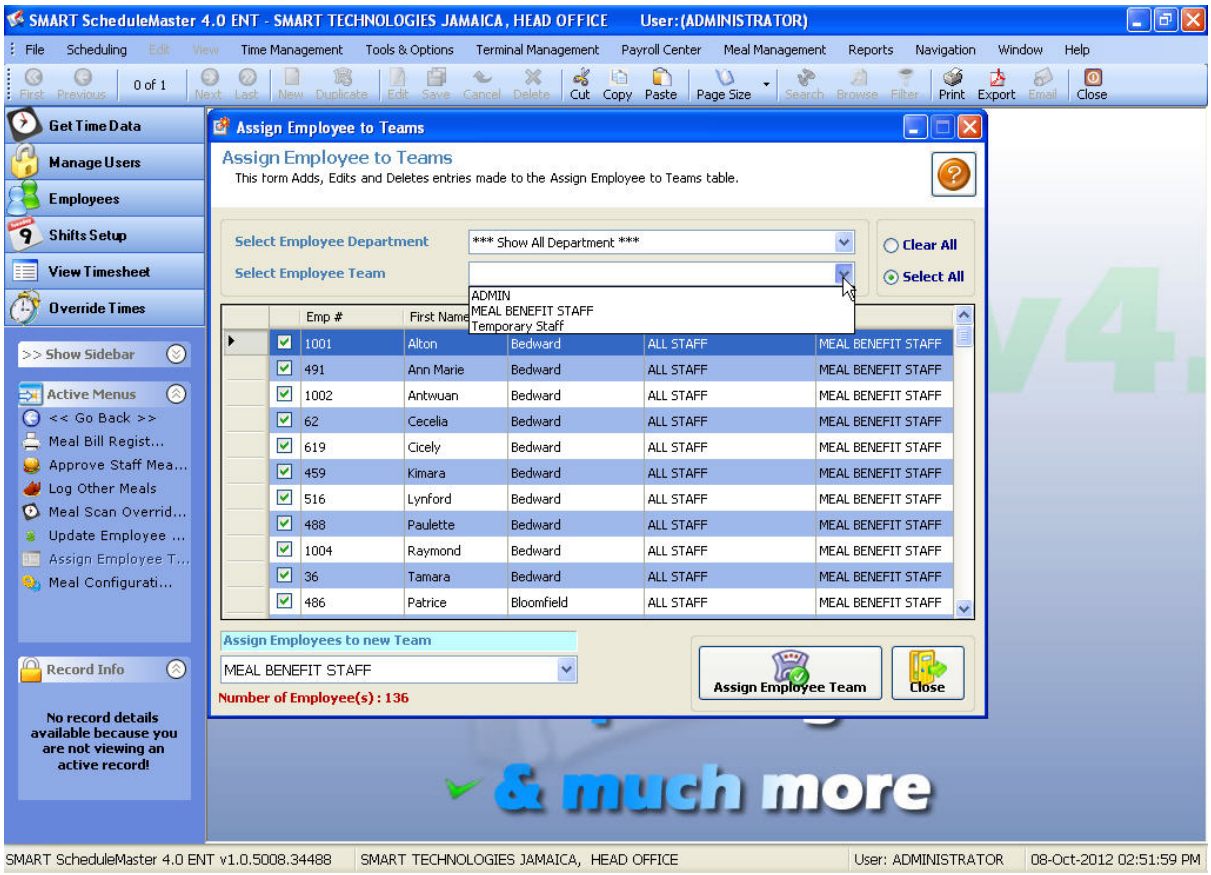


Step 5 - Return to the minimized screen and right click on the drop-down box

Step 6 - Click on Refresh List

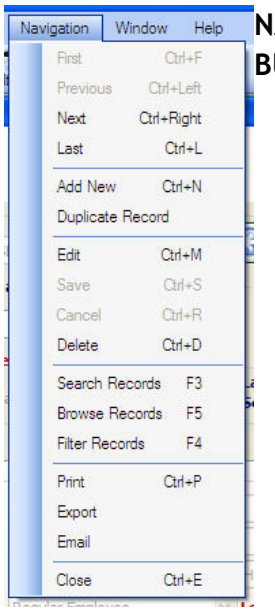


The updated information will now appear:


SMART ScheduleMaster 4.0 ENT - SMART TECHNOLOGIES JAMAICA, HEAD OFFICE User:(ADMINISTRATOR)
File Scheduling Edit View Time Management Tools & Options Terminal Management Payroll Center Meal Management Reports Navigation Window Help
First Previous 0 of 1 Next Last New Duplicate Edit Save Cancel Delete Cut Copy Paste Page Size Search Browse Filter Print Export Email Close
Get Time Data
Manage Users
Employees
Shifts Setup
View Timesheet
Override Times
>> Show Sidebar
Active Menus
<< Go Back >>
Meal Bill Regist...
Approve Staff Mea...
Log Other Meals
Meal Scan Overrid...
Update Employee ...
Assign Employee T...
Meal Configurati...
Record Info
No record details available because you are not viewing an active record!
Assign Employee to Teams
Assign Employee to Teams
This form Adds, Edits and Deletes entries made to the Assign Employee to Teams table.
Select Employee Department
*** Show All Department ***
Select Employee Team
ADMIN
MEAL BENEFIT STAFF
Temporary Staff
Clear All
Select All
Emp # First Name
1001 Alton Bedward ALL STAFF MEAL BENEFIT STAFF
491 Ann Marie Bedward ALL STAFF MEAL BENEFIT STAFF
1002 Antwuan Bedward ALL STAFF MEAL BENEFIT STAFF
62 Cecelia Bedward ALL STAFF MEAL BENEFIT STAFF
619 Cicely Bedward ALL STAFF MEAL BENEFIT STAFF
459 Kimara Bedward ALL STAFF MEAL BENEFIT STAFF
516 Lynford Bedward ALL STAFF MEAL BENEFIT STAFF
488 Paulette Bedward ALL STAFF MEAL BENEFIT STAFF
1004 Raymond Bedward ALL STAFF MEAL BENEFIT STAFF
36 Tamara Bedward ALL STAFF MEAL BENEFIT STAFF
486 Patrice Bloomfield ALL STAFF MEAL BENEFIT STAFF
Assign Employees to new Team
MEAL BENEFIT STAFF
Number of Employee(s) : 136
Assign Employee Team
Close
& much more
SMART ScheduleMaster 4.0 ENT v1.0.5008.34488
SMART TECHNOLOGIES JAMAICA, HEAD OFFICE
User: ADMINISTRATOR
08-Oct-2012 02:51:59 PM

4.1.8.1.7 Report Types

The Navigation toolbar and Menu contains functions for record navigation, record management, searching and printing to a printer, export file or email. See below for details of click on option for quick reference.



NAVIGATION BUTTONS
- o First
- o Previous
- o Next
- o Last

DATA ENTRY OPERATIONS
- o Add New
- o Duplicate
- o Edit
- o Save
- o Cancel
- o Delete
- o Cut, Copy & Paste

SEARCH OPTIONS
- o Page Size
- o Search
- o Browse
- o Filter

PRINTING
- o Print
- o Export
- o Email

NAVIGATION BUTTONS

These buttons are used to navigate records on a data entry screen.

First : First navigates to the first record in the full record (or filtered) list.
Previous : Previous navigates to one record previous to the current record on screen (like a back button). Current record -1
Next : Next navigates to one record next to the current record on screen (like a forward button). Current record +1
Last : Last navigates to the last record in the full record (or filtered) list.

CUT, COPY AND PASTE

The cut, copy and paste buttons works similar to the operations in the Windows operating system.

PAGE SIZE

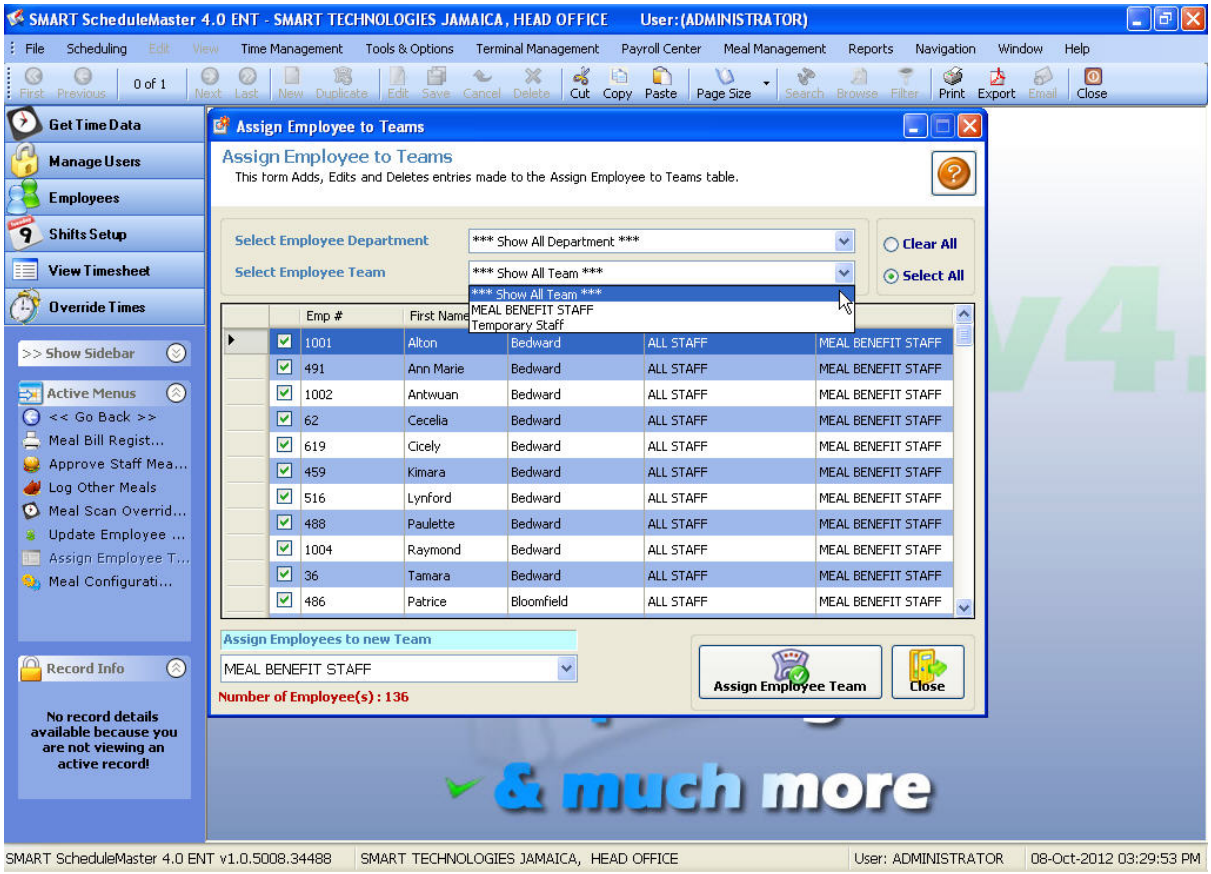
© 2014 Enter your company name

Page Size determines the maximum number of records that are retrieved from the database at any one time. This is an efficiency tool to improve performance. Eg. Opening the employee screen if set to maximum page size may pull up to 32,000 at once which may delay the application. Further, the user still have to browse, search or filter that list of find the desired record. Setting the page size to an optimal number or a low number will ensure all screens are opened promptly then the specified search will only return the desired records and not the entire record list.

Each user can set their desired page for data retrieval and it will apply to all data entry screens within the application.

HOW TO REFRESH DROP DOWN LISTS

When working in a particular screen, sometimes users will need to add/create new options within their drop down boxes. Here is an image of a screen prior to adding the new option in the drop down box:

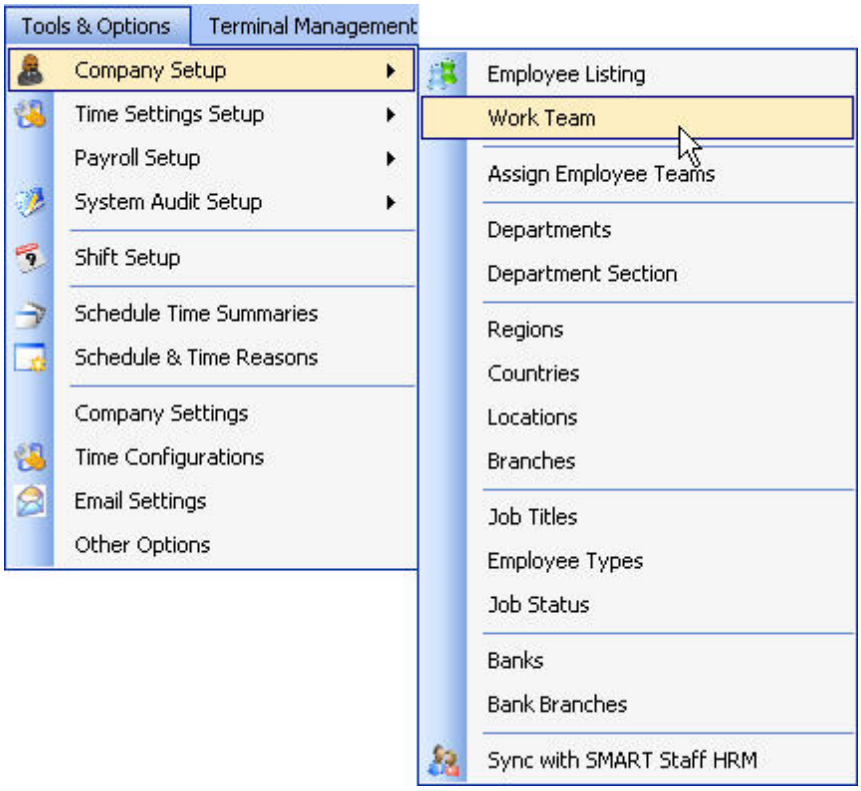


The process of adding options to a drop down box is carried out mostly in your

Maintenance Menu. The user can simply minimize the current screen and open the relevant screen in the Maintenance Menu. They then proceed to add the relevant information for the drop down box and save. Once saved, they can return to the minimized screen and Refresh the list by right clicking on the drop down box and selecting Refresh List. The following screen shots detail the process:

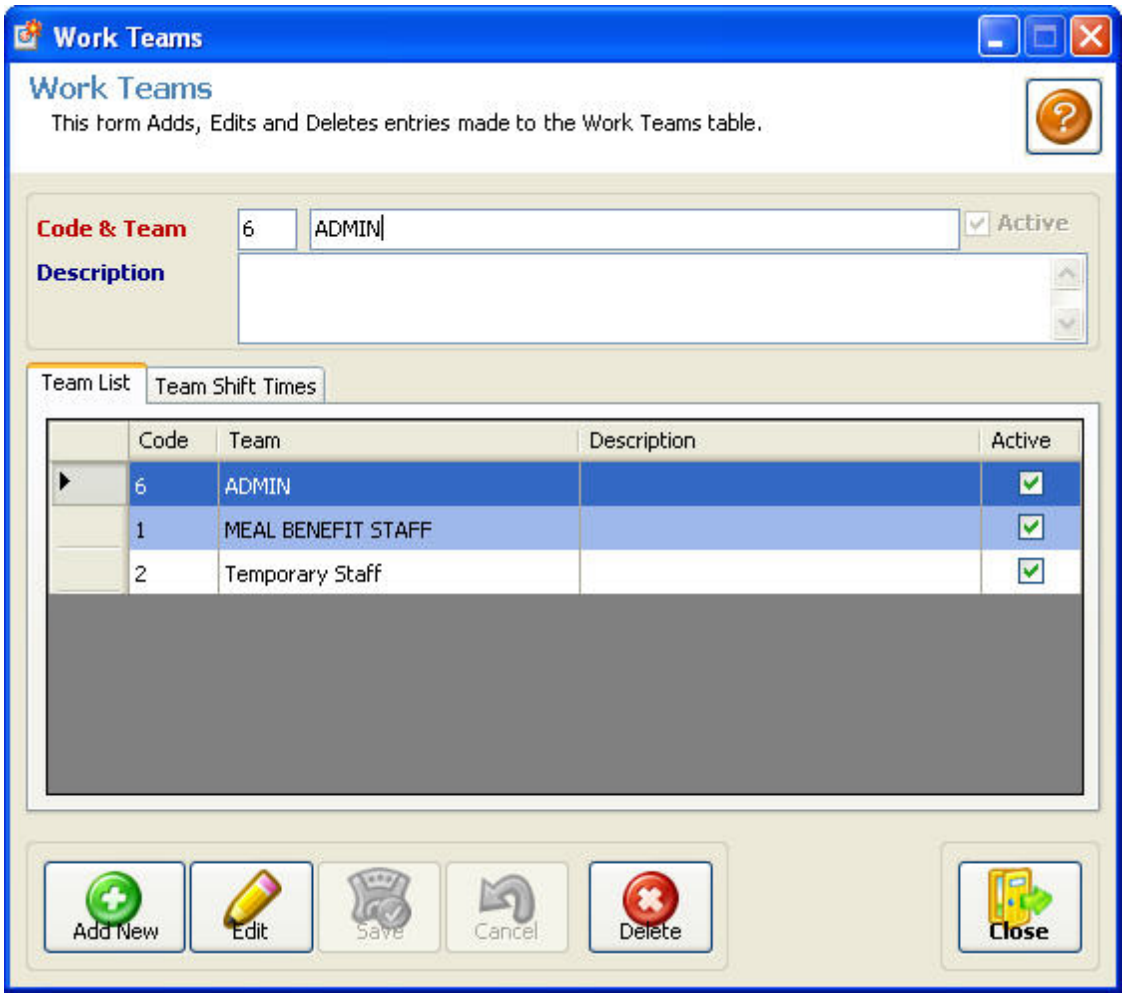
E.g. Adding A Work Team.

Step 1 - Minimize your current screen, then open the Work Team option in Company Setup under the Tools & Options Menu

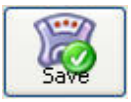


Step 2 - Click the ADD NEW button

Step 3 - Input the Code and Team Name

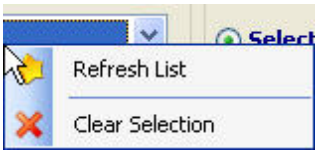


Step 4 - Save the Information

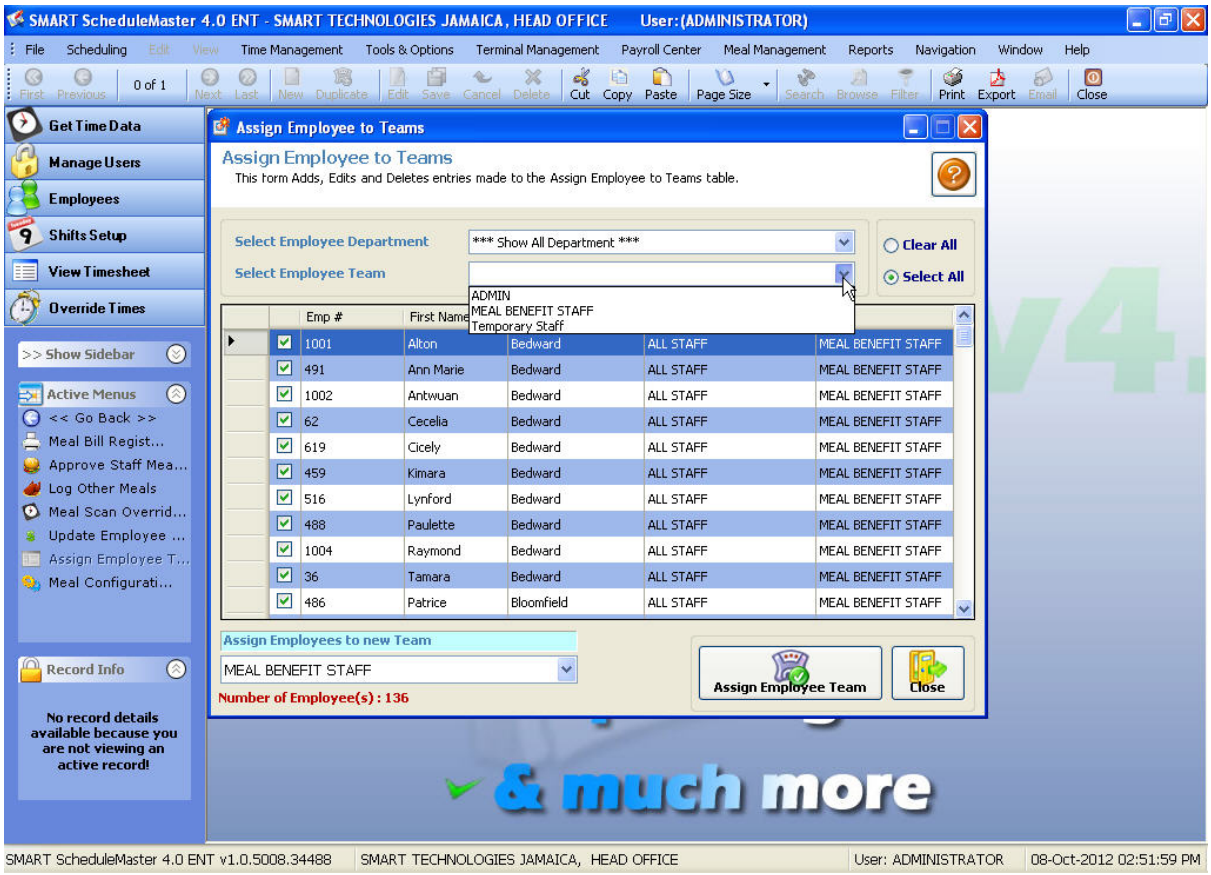


Step 5 - Return to the minimized screen and right click on the drop-down box

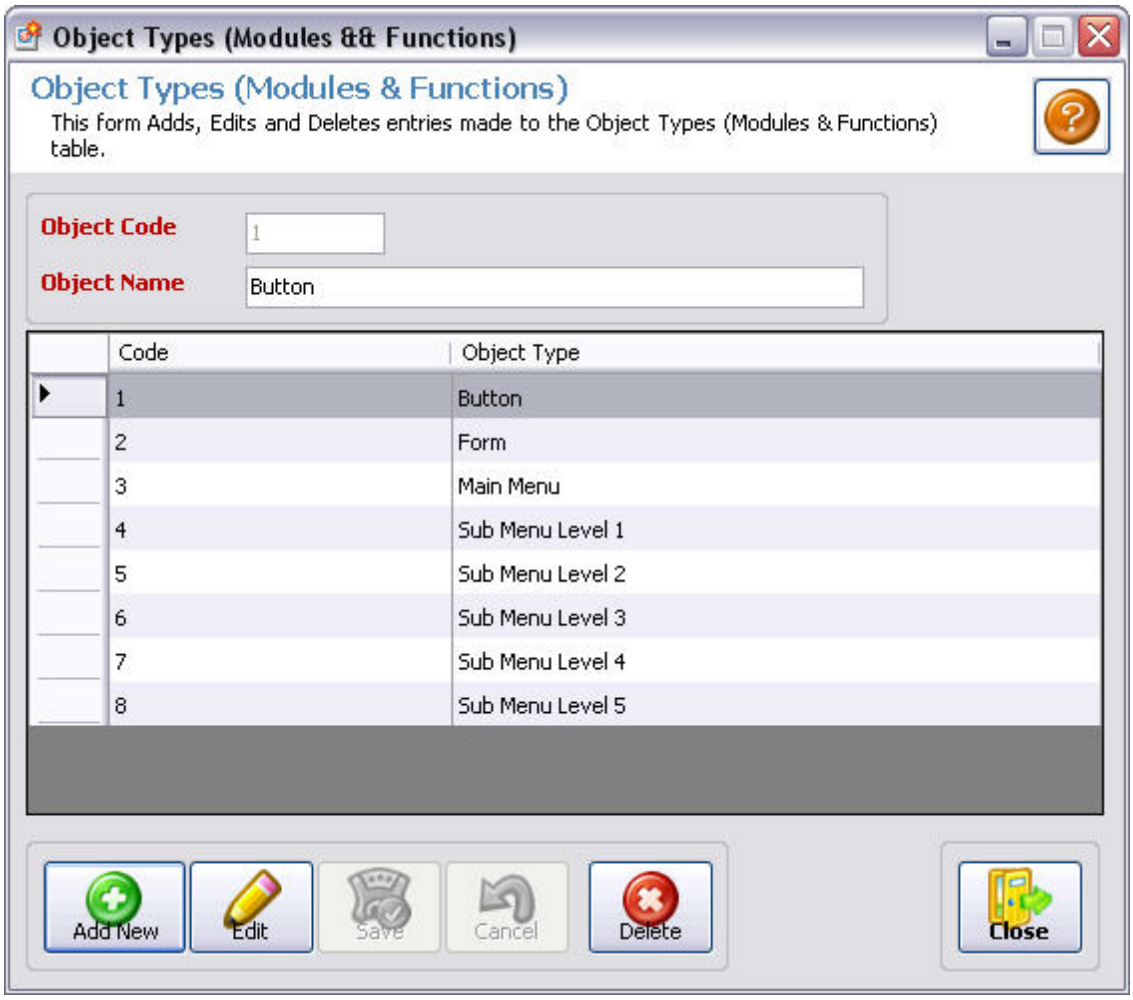
Step 6 - Click on Refresh List



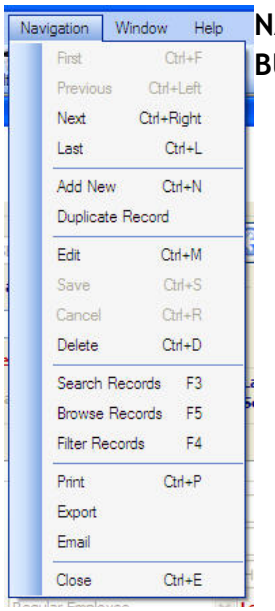
The updated information will now appear:



4.1.8.1.8 Object Types



The Navigation toolbar and Menu contains functions for record navigation, record management, searching and printing to a printer, export file or email. See below for details of click on option for quick reference.



NAVIGATION BUTTONS
- o First
- o Previous
- o Next
- o Last

DATA ENTRY OPERATIONS
- o Add New
- o Duplicate
- o Edit
- o Save
- o Cancel
- o Delete
- o Cut, Copy & Paste

SEARCH OPTIONS
- o Page Size
- o Search
- o Browse
- o Filter

PRINTING
- o Print
- o Export
- o Email

NAVIGATION BUTTONS

These buttons are used to navigate records on a data entry screen.

First : First navigates to the first record in the full record (or filtered) list.
Previous : Previous navigates to one record previous to the current record on screen (like a back button). Current record -1
Next : Next navigates to one record next to the current record on screen (like a forward button). Current record +1
Last : Last navigates to the last record in the full record (or filtered) list.

CUT, COPY AND PASTE

The cut, copy and paste buttons works similar to the operations in the Windows operating system.

PAGE SIZE

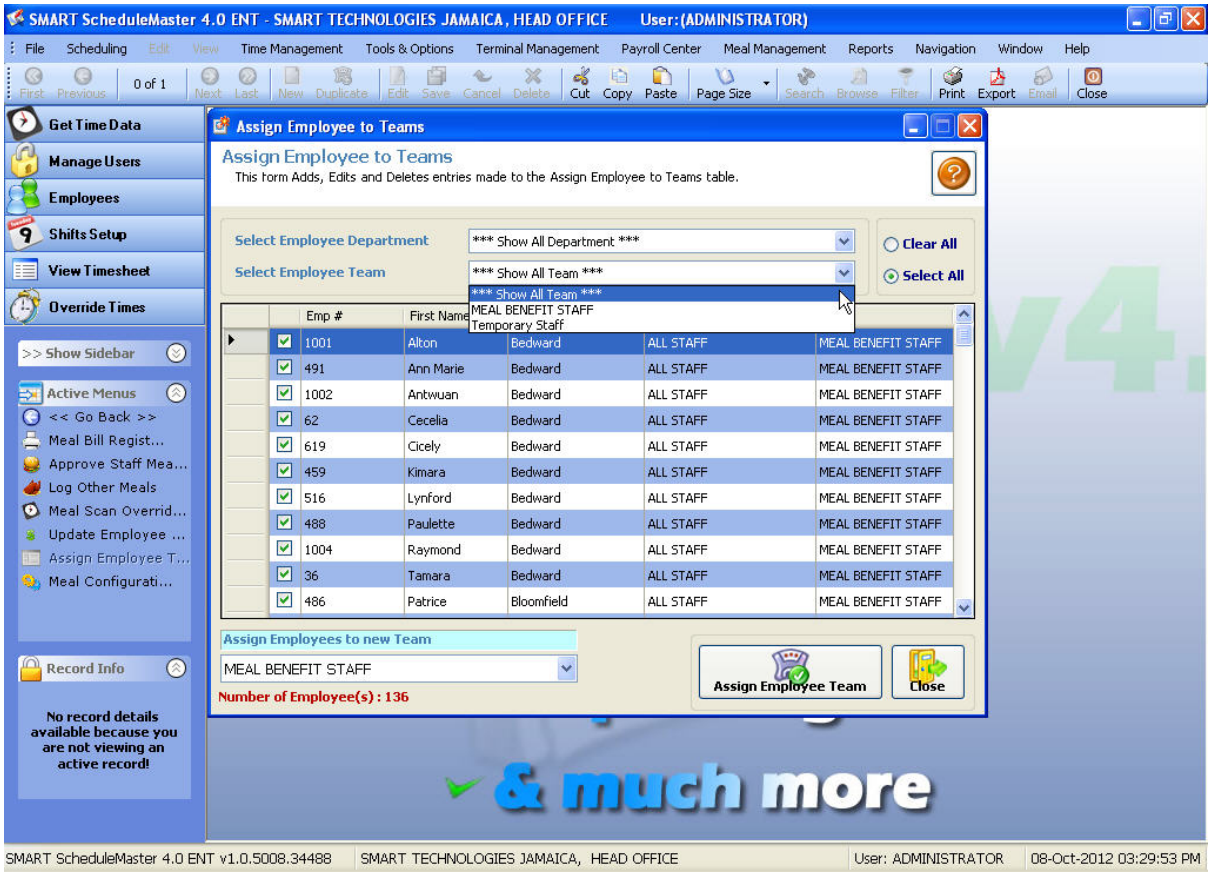
© 2014 Enter your company name

Page Size determines the maximum number of records that are retrieved from the database at any one time. This is an efficiency tool to improve performance. Eg. Opening the employee screen if set to maximum page size may pull up to 32,000 at once which may delay the application. Further, the user still have to browse, search or filter that list of find the desired record. Setting the page size to an optimal number or a low number will ensure all screens are opened promptly then the specified search will only return the desired records and not the entire record list.

Each user can set their desired page for data retrieval and it will apply to all data entry screens within the application.

HOW TO REFRESH DROP DOWN LISTS

When working in a particular screen, sometimes users will need to add/create new options within their drop down boxes. Here is an image of a screen prior to adding the new option in the drop down box:

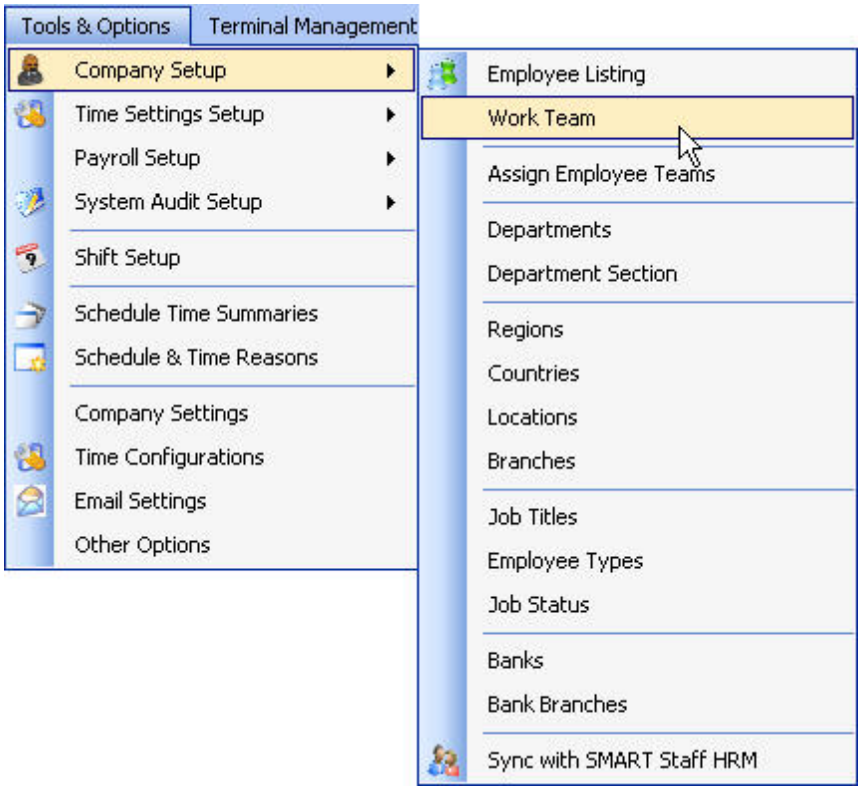


The process of adding options to a drop down box is carried out mostly in your

Maintenance Menu. The user can simply minimize the current screen and open the relevant screen in the Maintenance Menu. They then proceed to add the relevant information for the drop down box and save. Once saved, they can return to the minimized screen and Refresh the list by right clicking on the drop down box and selecting Refresh List. The following screen shots detail the process:

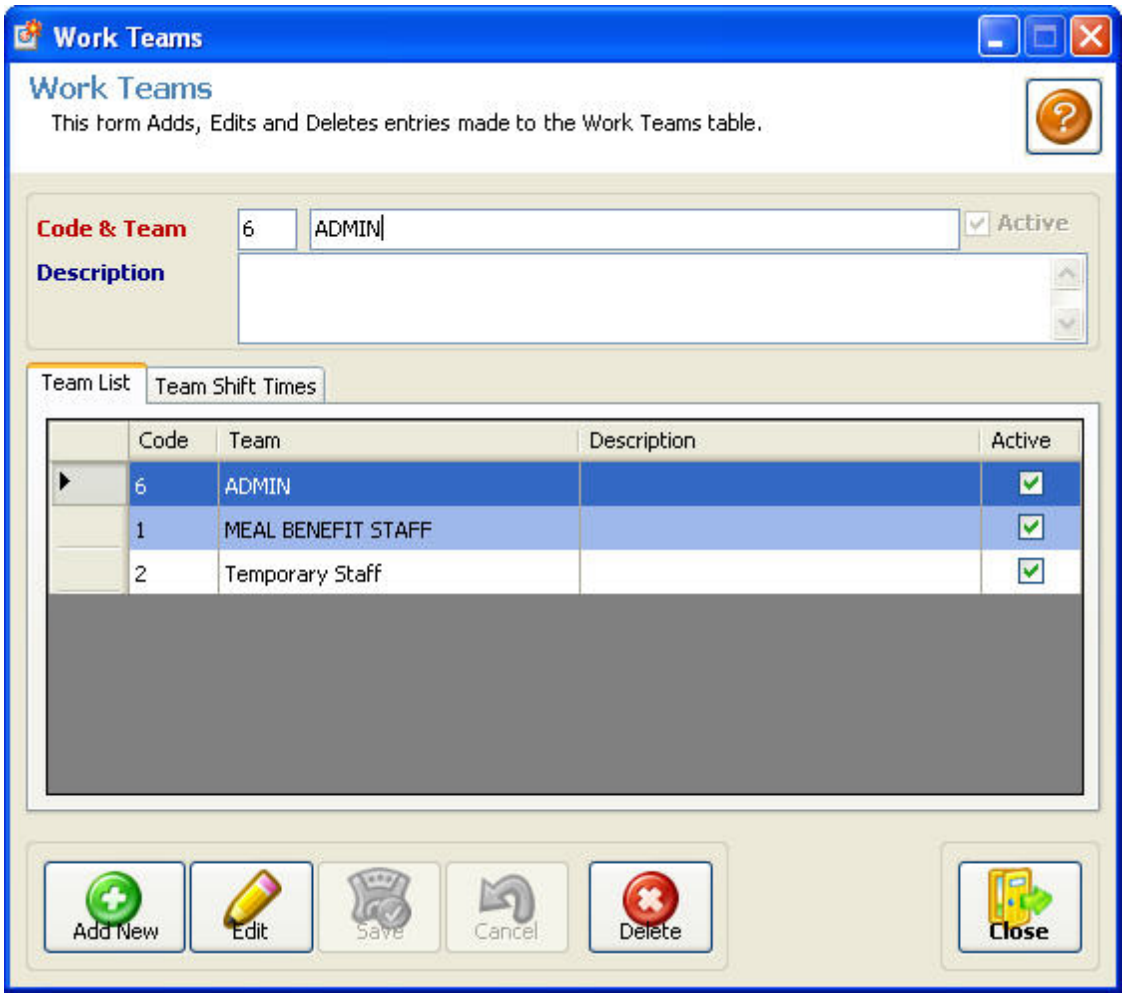
E.g. Adding A Work Team.

Step 1 - Minimize your current screen, then open the Work Team option in Company Setup under the Tools & Options Menu

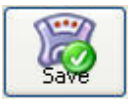


Step 2 - Click the ADD NEW button

Step 3 - Input the Code and Team Name

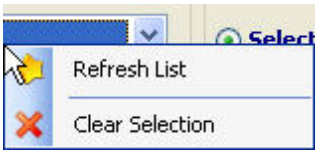


Step 4 - Save the Information

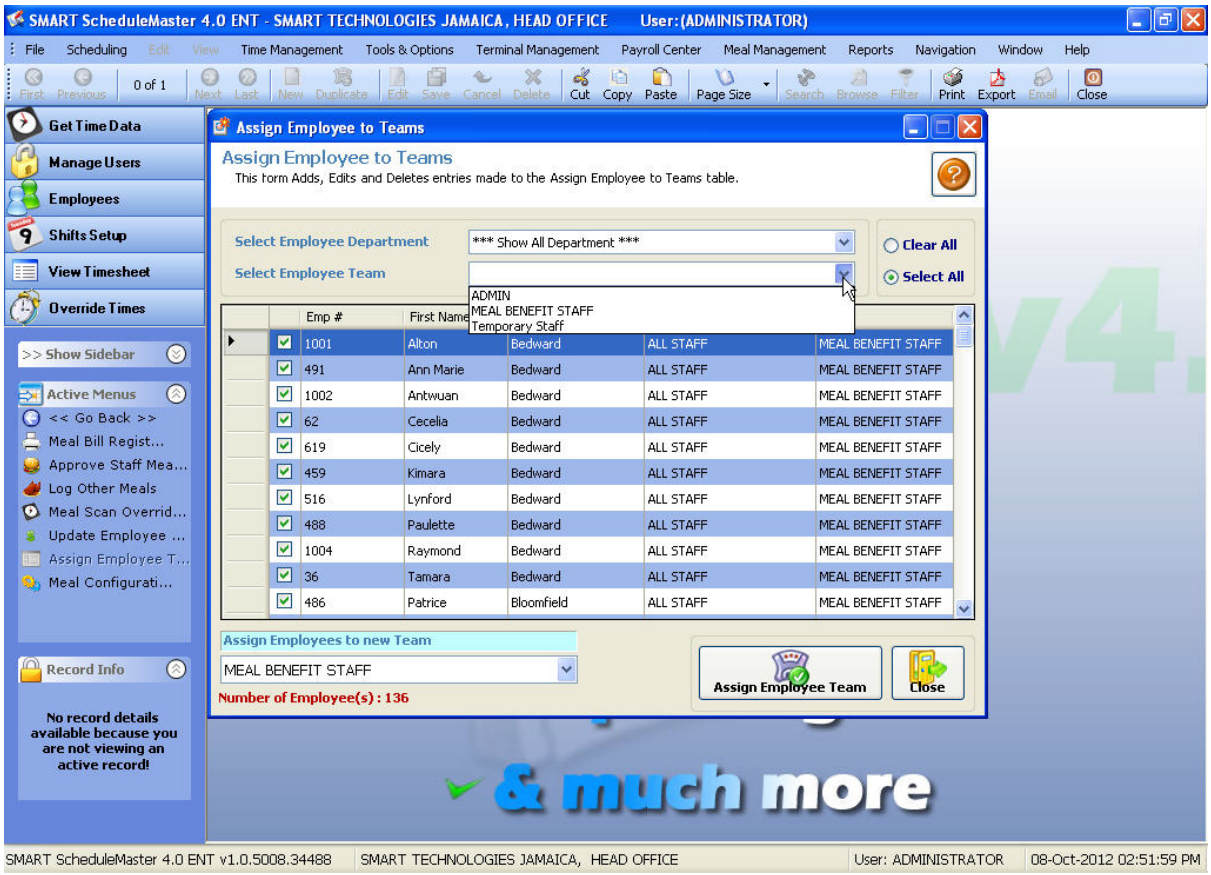


Step 5 - Return to the minimized screen and right click on the drop-down box

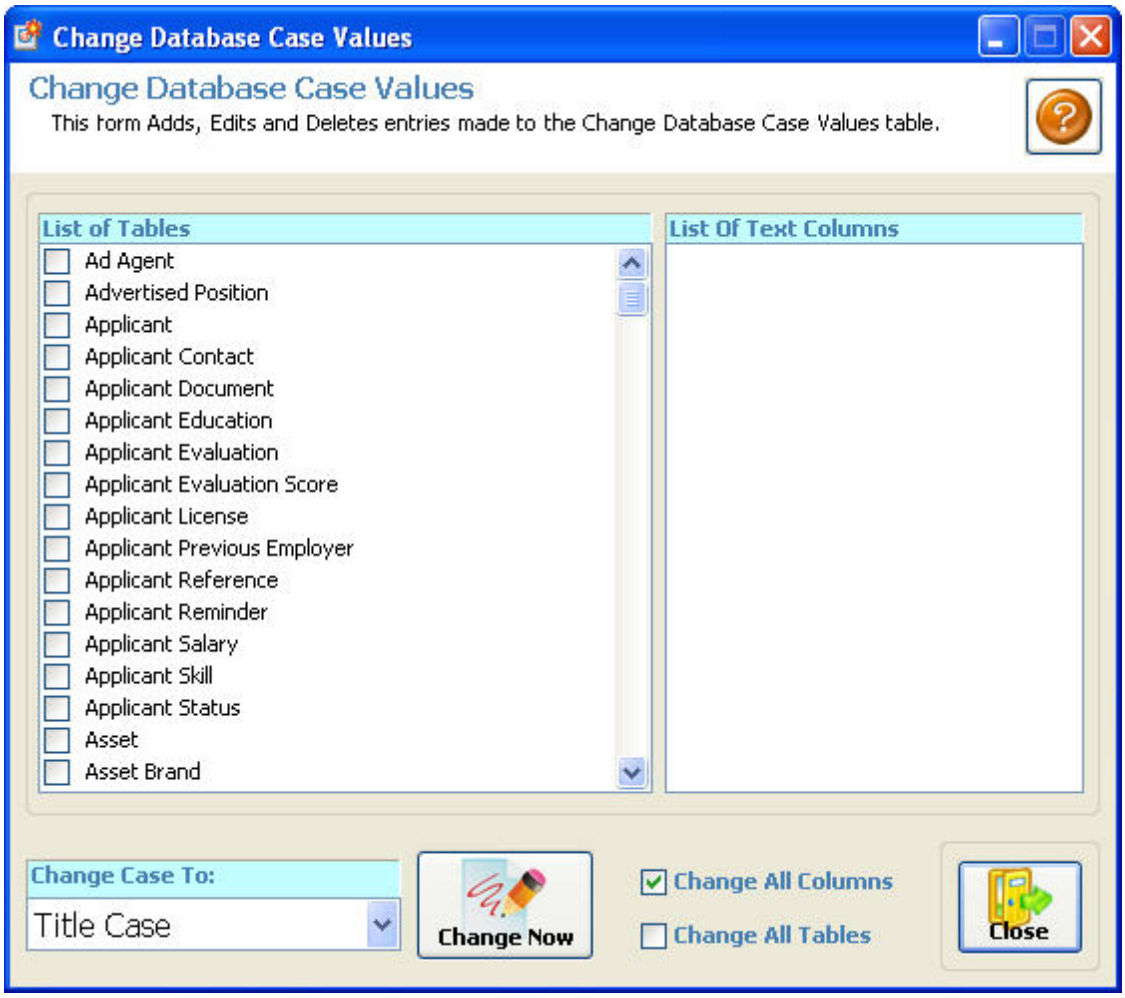
Step 6 - Click on Refresh List



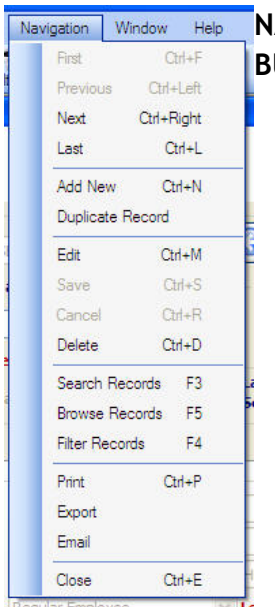
The updated information will now appear:



4.1.8.1.9 Change Case Utility



The Navigation toolbar and Menu contains functions for record navigation, record management, searching and printing to a printer, export file or email. See below for details of click on option for quick reference.



NAVIGATION BUTTONS
- o First
- o Previous
- o Next
- o Last

DATA ENTRY OPERATIONS
- o Add New
- o Duplicate
- o Edit
- o Save
- o Cancel
- o Delete
- o Cut, Copy & Paste

SEARCH OPTIONS
- o Page Size
- o Search
- o Browse
- o Filter

PRINTING
- o Print
- o Export
- o Email

NAVIGATION BUTTONS

These buttons are used to navigate records on a data entry screen.

First : First navigates to the first record in the full record (or filtered) list.
Previous : Previous navigates to one record previous to the current record on screen (like a back button). Current record -1
Next : Next navigates to one record next to the current record on screen (like a forward button). Current record +1
Last : Last navigates to the last record in the full record (or filtered) list.

CUT, COPY AND PASTE

The cut, copy and paste buttons works similar to the operations in the Windows operating system.

PAGE SIZE

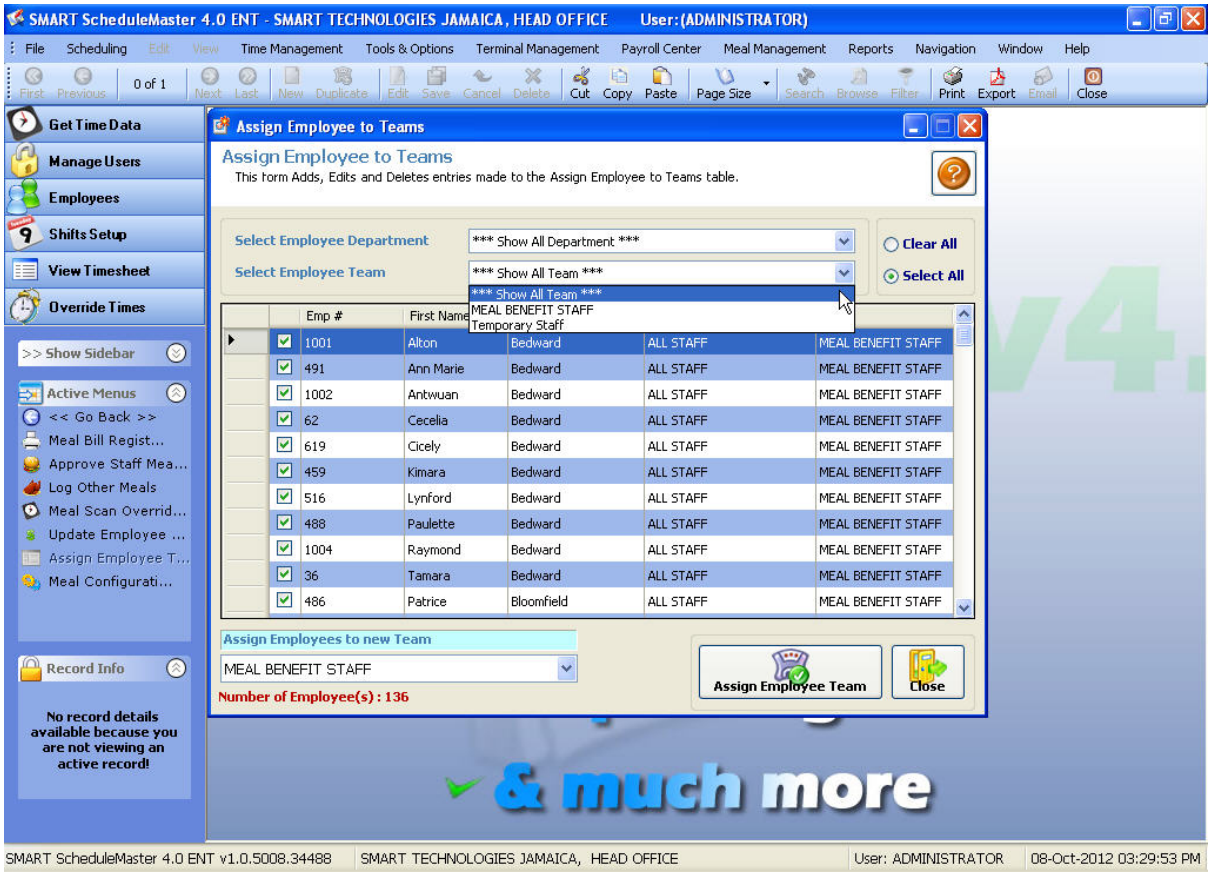
© 2014 Enter your company name

Page Size determines the maximum number of records that are retrieved from the database at any one time. This is an efficiency tool to improve performance. Eg. Opening the employee screen if set to maximum page size may pull up to 32,000 at once which may delay the application. Further, the user still have to browse, search or filter that list of find the desired record. Setting the page size to an optimal number or a low number will ensure all screens are opened promptly then the specified search will only return the desired records and not the entire record list.

Each user can set their desired page for data retrieval and it will apply to all data entry screens within the application.

HOW TO REFRESH DROP DOWN LISTS

When working in a particular screen, sometimes users will need to add/create new options within their drop down boxes. Here is an image of a screen prior to adding the new option in the drop down box:

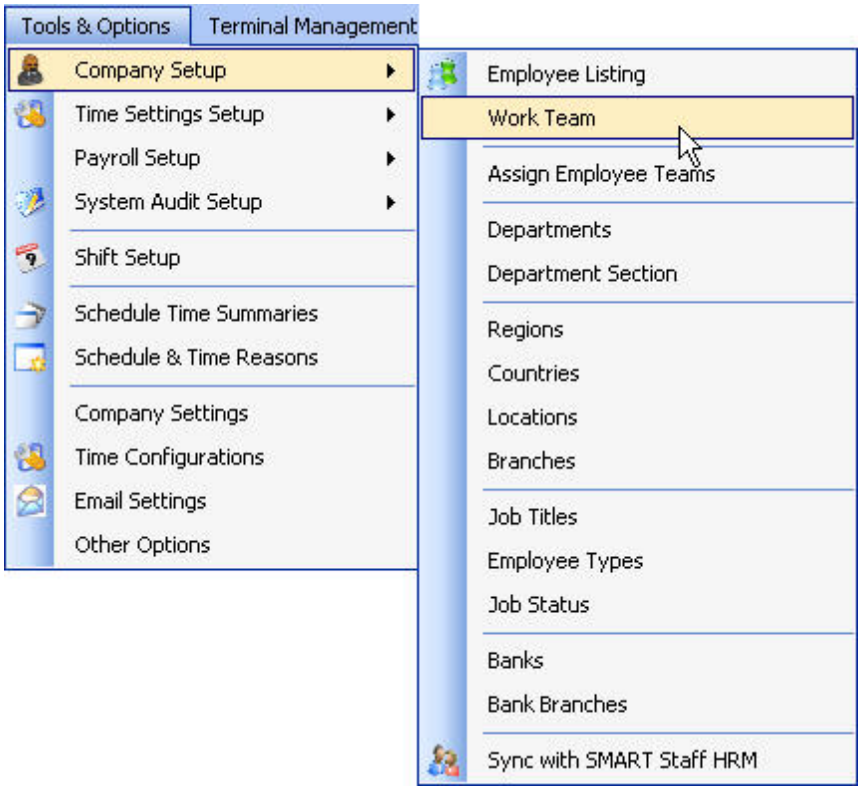


The process of adding options to a drop down box is carried out mostly in your

Maintenance Menu. The user can simply minimize the current screen and open the relevant screen in the Maintenance Menu. They then proceed to add the relevant information for the drop down box and save. Once saved, they can return to the minimized screen and Refresh the list by right clicking on the drop down box and selecting Refresh List. The following screen shots detail the process:

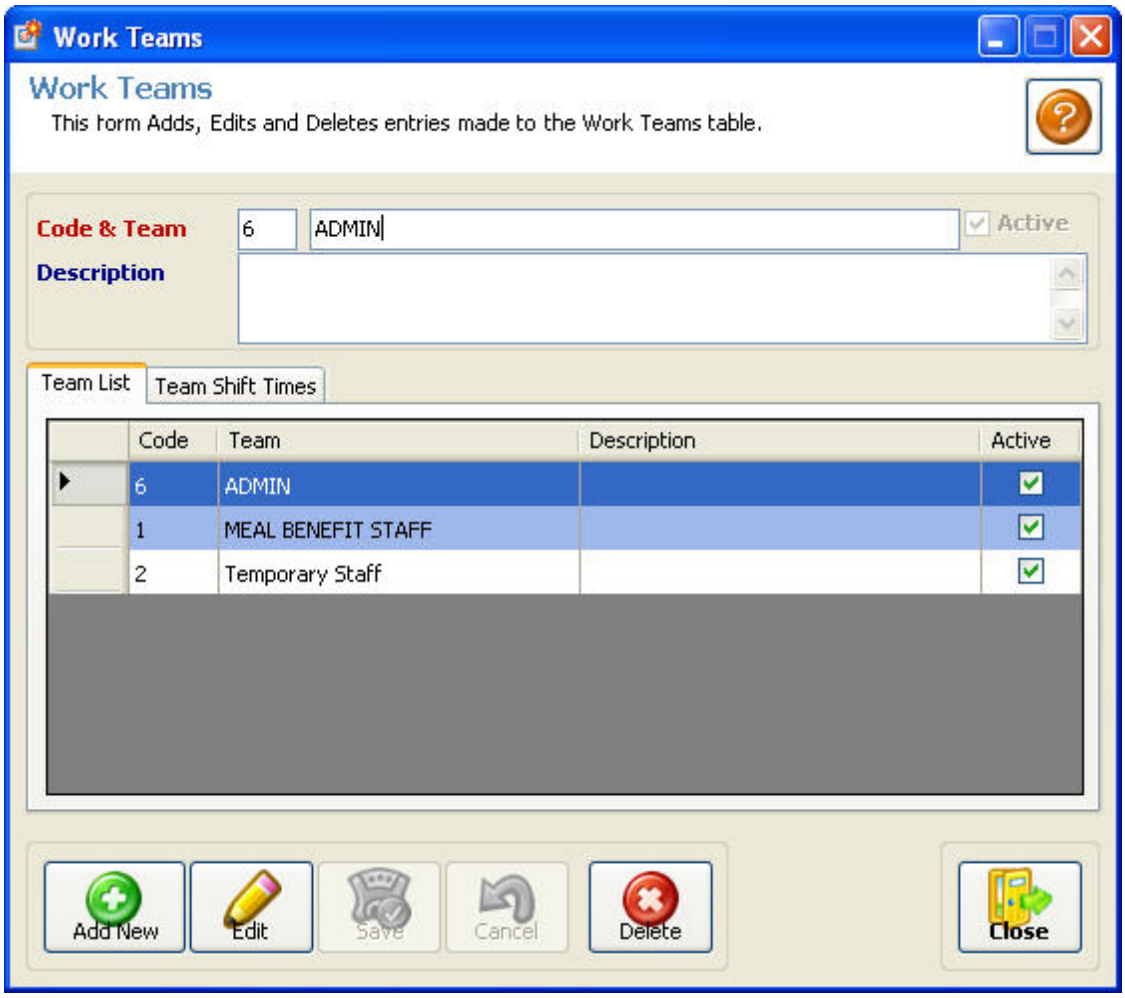
E.g. Adding A Work Team.

Step 1 - Minimize your current screen, then open the Work Team option in Company Setup under the Tools & Options Menu

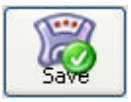


Step 2 - Click the ADD NEW button

Step 3 - Input the Code and Team Name

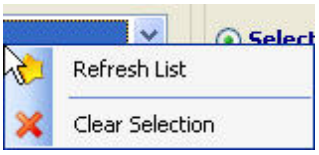


Step 4 - Save the Information

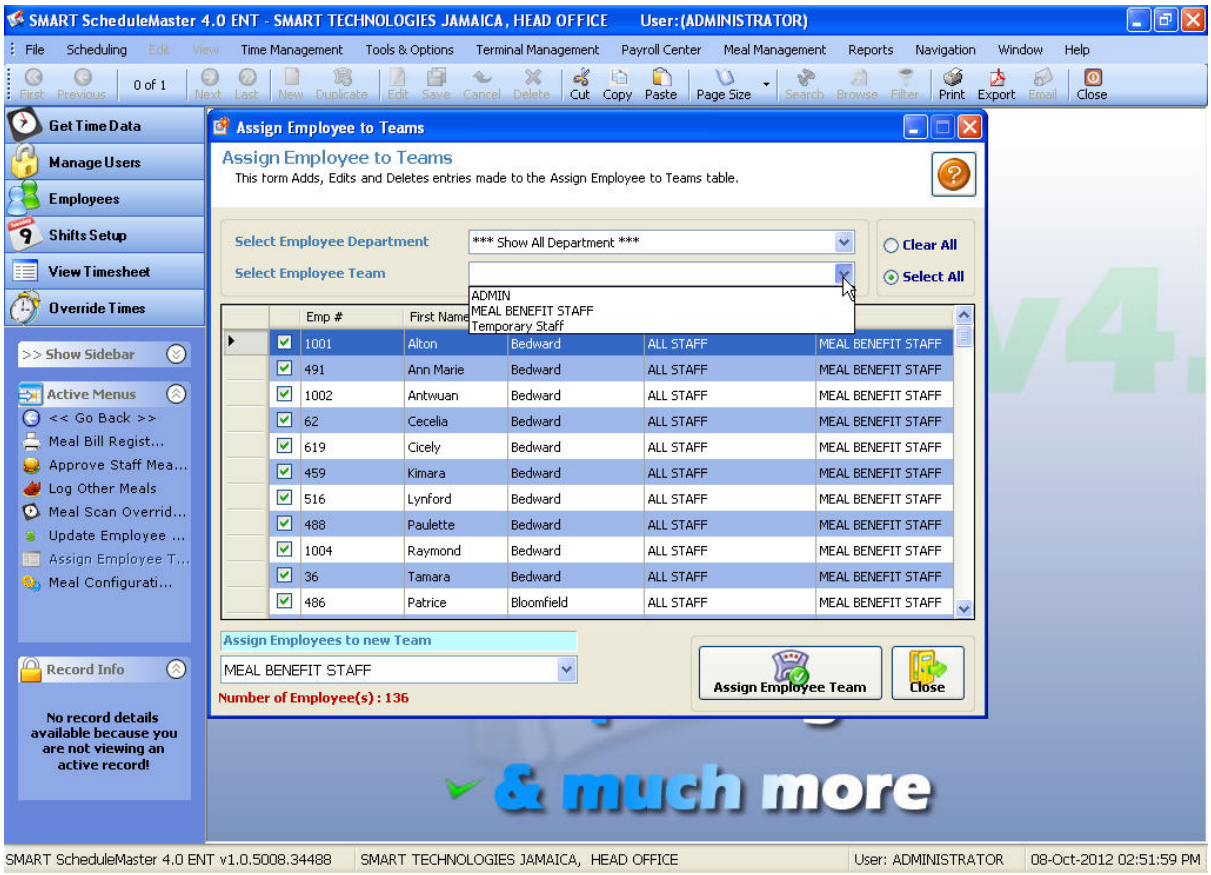


Step 5 - Return to the minimized screen and right click on the drop-down box

Step 6 - Click on Refresh List

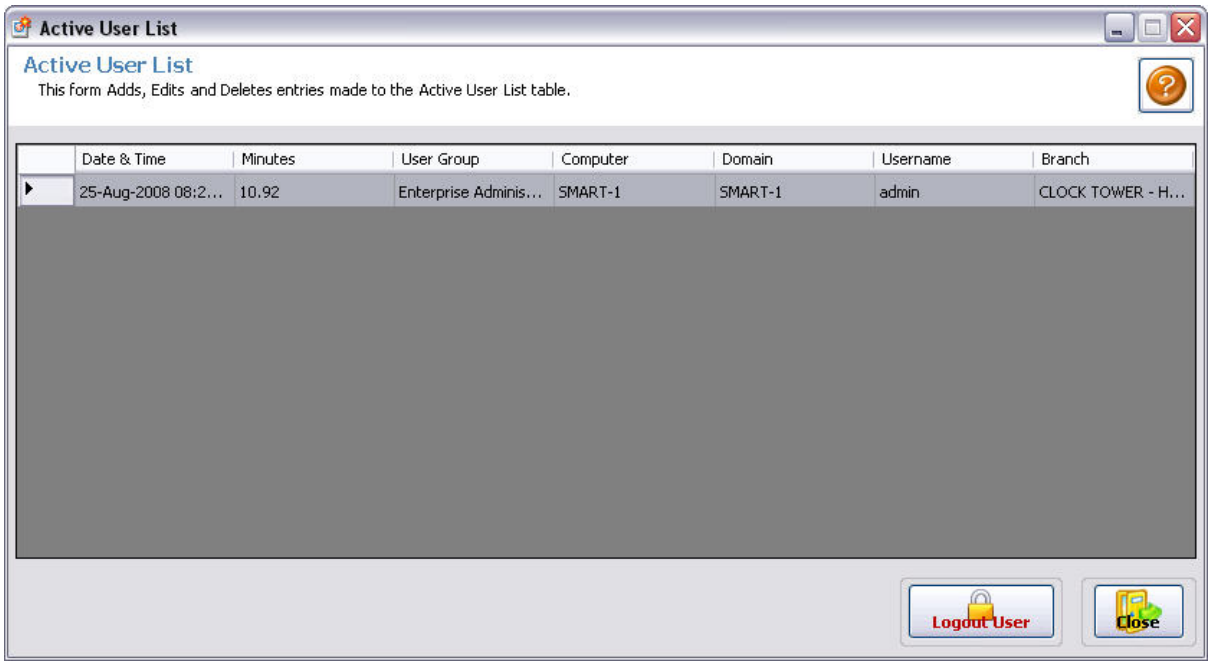


The updated information will now appear:

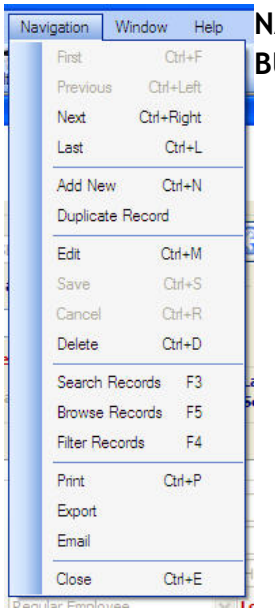


4.1.8.2 Active Users

Active users list is populated with the credentials and details about previous logins made by each user of the SMART Staff Manager.



The Navigation toolbar and Menu contains functions for record navigation, record management, searching and printing to a printer, export file or email. See below for details of click on option for quick reference.



NAVIGATION BUTTONS
- o First
- o Previous
- o Next
- o Last

DATA ENTRY OPERATIONS
- o Add New
- o Duplicate
- o Edit
- o Save
- o Cancel
- o Delete
- o Cut, Copy & Paste

SEARCH OPTIONS
- o Page Size
- o Search
- o Browse
- o Filter

PRINTING
- o Print
- o Export
- o Email

NAVIGATION BUTTONS

These buttons are used to navigate records on a data entry screen.

First : First navigates to the first record in the full record (or filtered) list.
Previous : Previous navigates to one record previous to the current record on screen (like a back button). Current record -1
Next : Next navigates to one record next to the current record on screen (like a forward button). Current record +1
Last : Last navigates to the last record in the full record (or filtered) list.

CUT, COPY AND PASTE

The cut, copy and paste buttons works similar to the operations in the Windows operating system.

PAGE SIZE

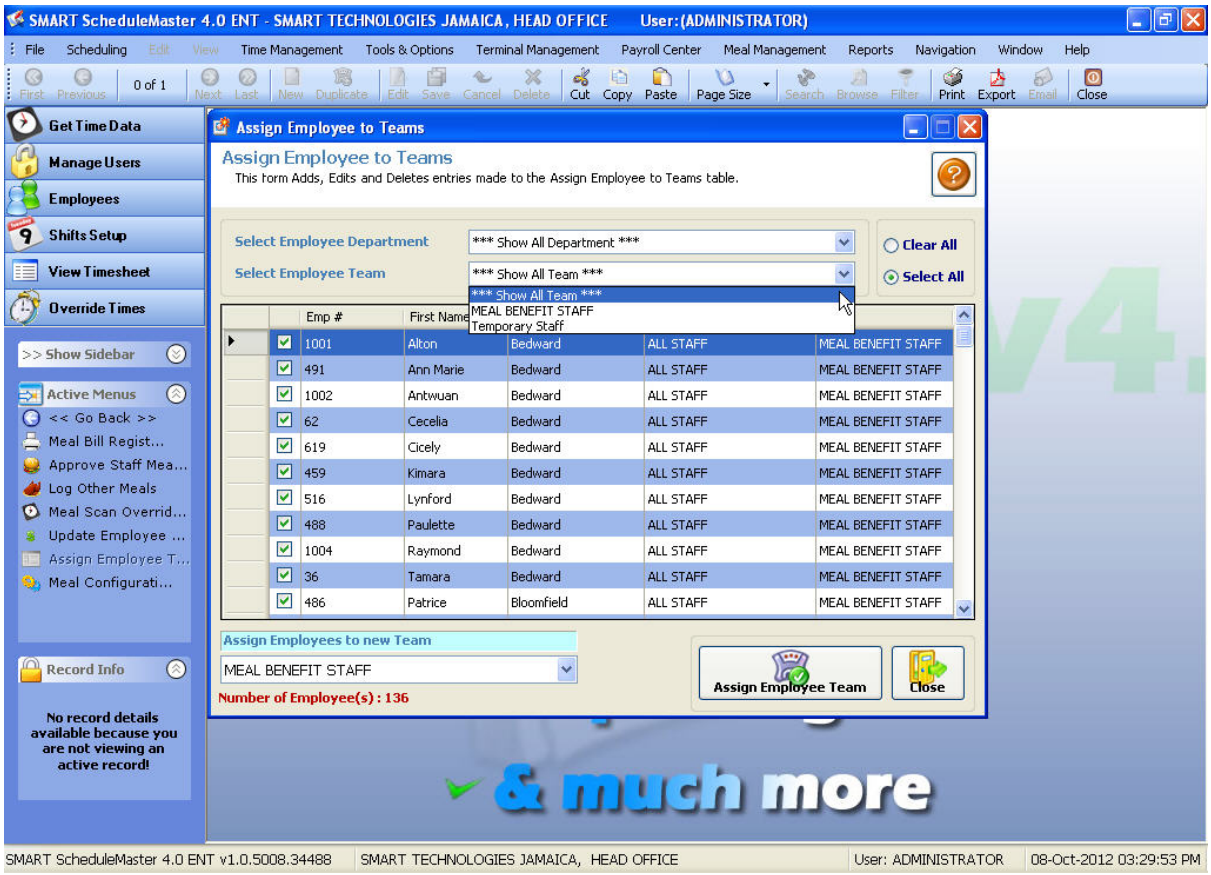
Page Size determines the maximum number of records that are retrieved from the database at any one time. This is an efficiency tool to improve performance. Eg. Opening the employee screen if set to maximum page size may pull up to 32,000 at once which may delay the application. Further, the user still have to browse, search or filter that list of find the desired record. Setting the page size to an optimal number or a low number will ensure all screens are opened promptly then the specified search will only return the desired records and not the entire record list.

Each user can set their desired page for data retrieval and it will apply to all data entry screens within the application.

HOW TO REFRESH DROP DOWN LISTS

When working in a particular screen, sometimes users will need to add/create new options within their drop down boxes. Here is an image of a screen prior to adding the new option in the drop down box:

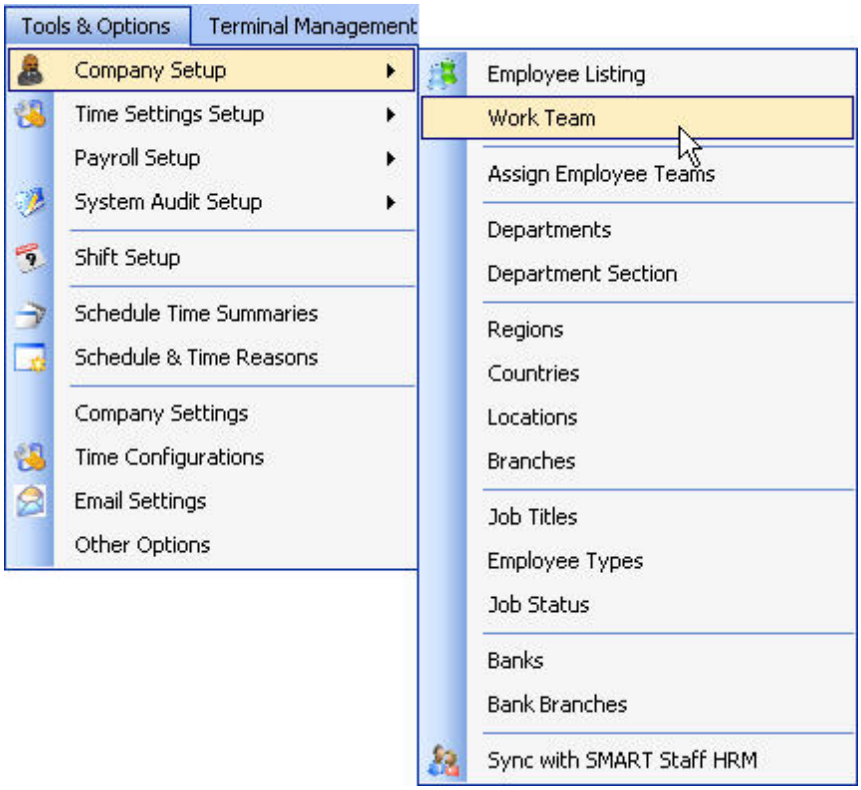
© 2014 Enter your company name



The process of adding options to a drop down box is carried out mostly in your Maintenance Menu. The user can simply minimize the current screen and open the relevant screen in the Maintenance Menu. They then proceed to add the relevant information for the drop down box and save. Once saved, they can return to the minimized screen and Refresh the list by right clicking on the drop down box and selecting Refresh List. The following screen shots detail the process:

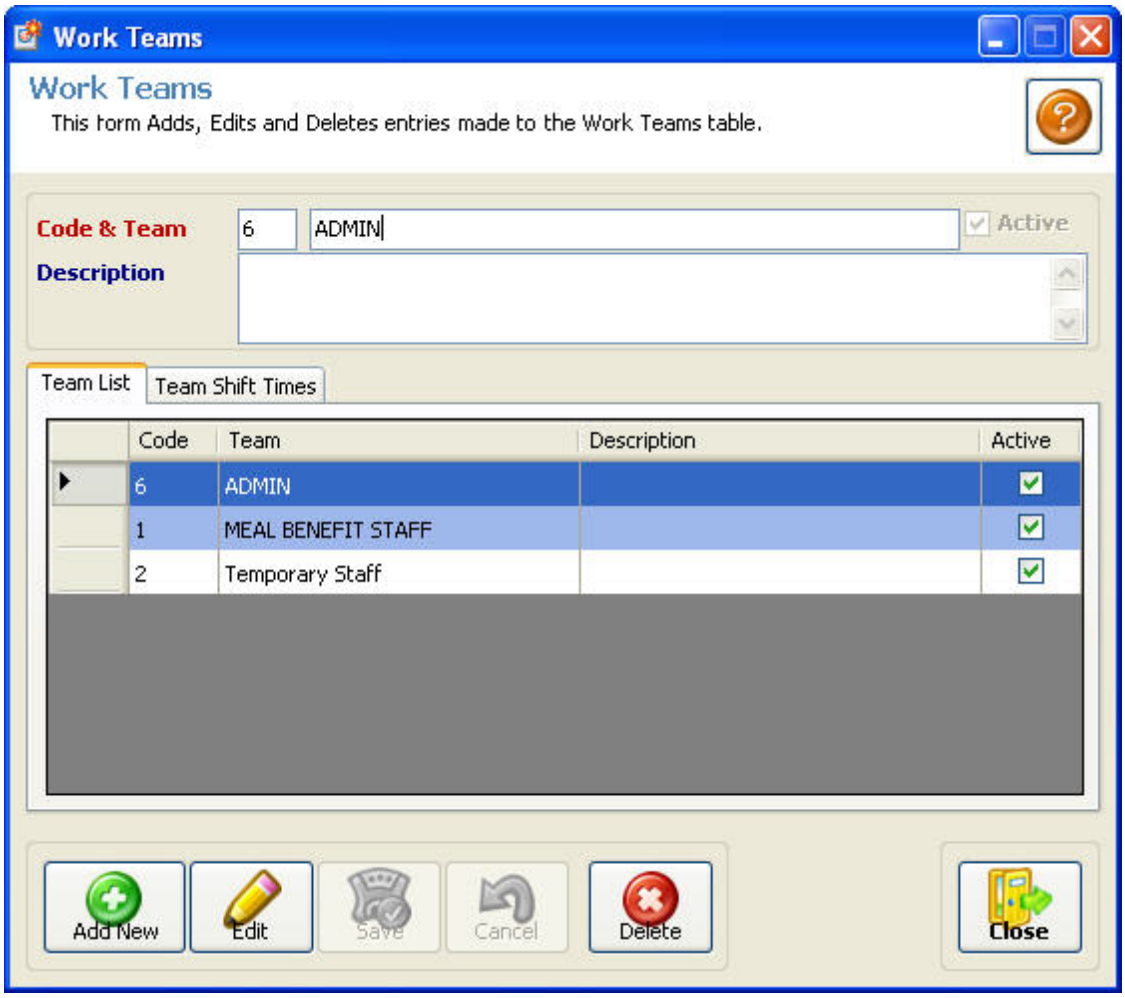
E.g. Adding A Work Team.

Step 1 - Minimize your current screen, then open the Work Team option in Company Setup under the Tools & Options Menu

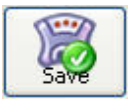


Step 2 - Click the ADD NEW button

Step 3 - Input the Code and Team Name

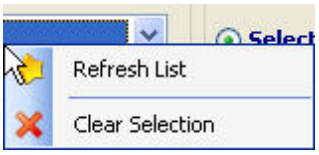


Step 4 - Save the Information

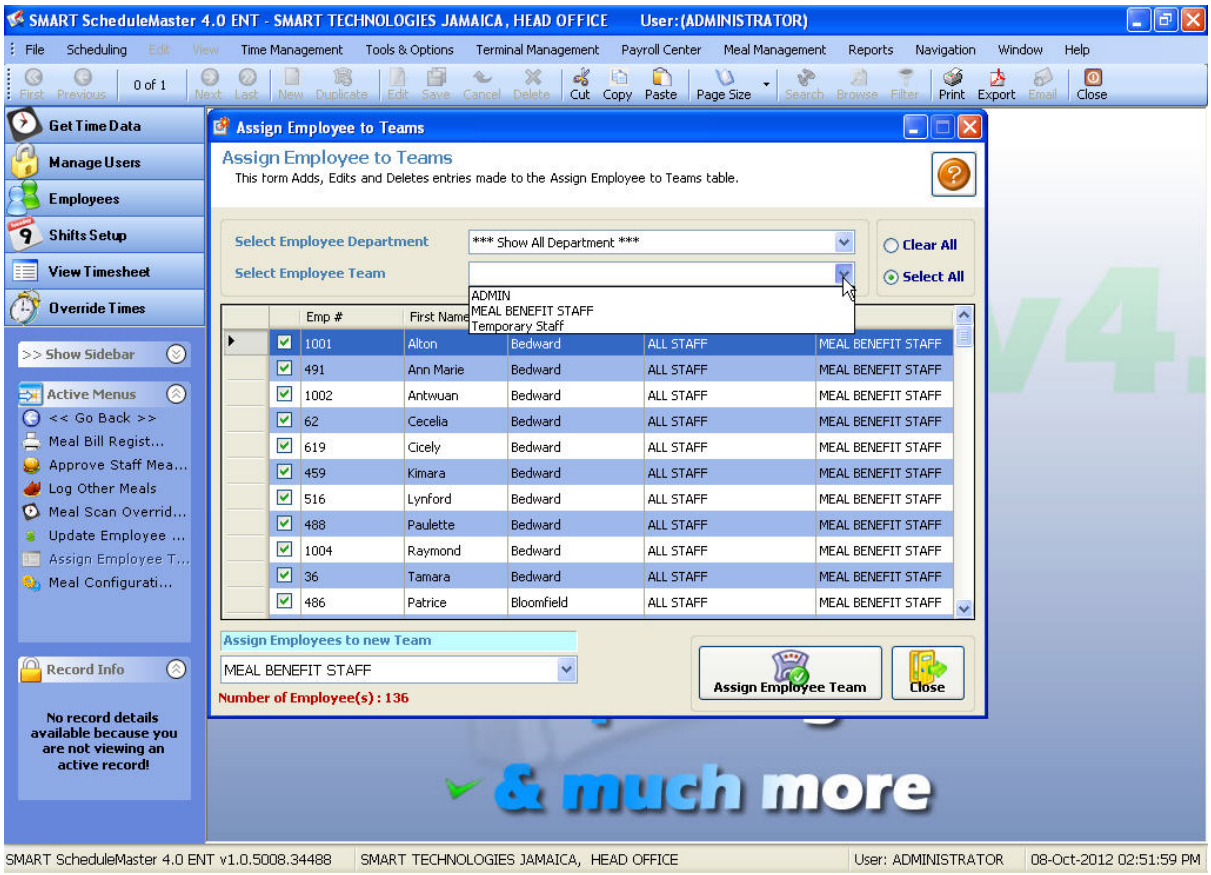


Step 5 - Return to the minimized screen and right click on the drop-down box

Step 6 - Click on Refresh List

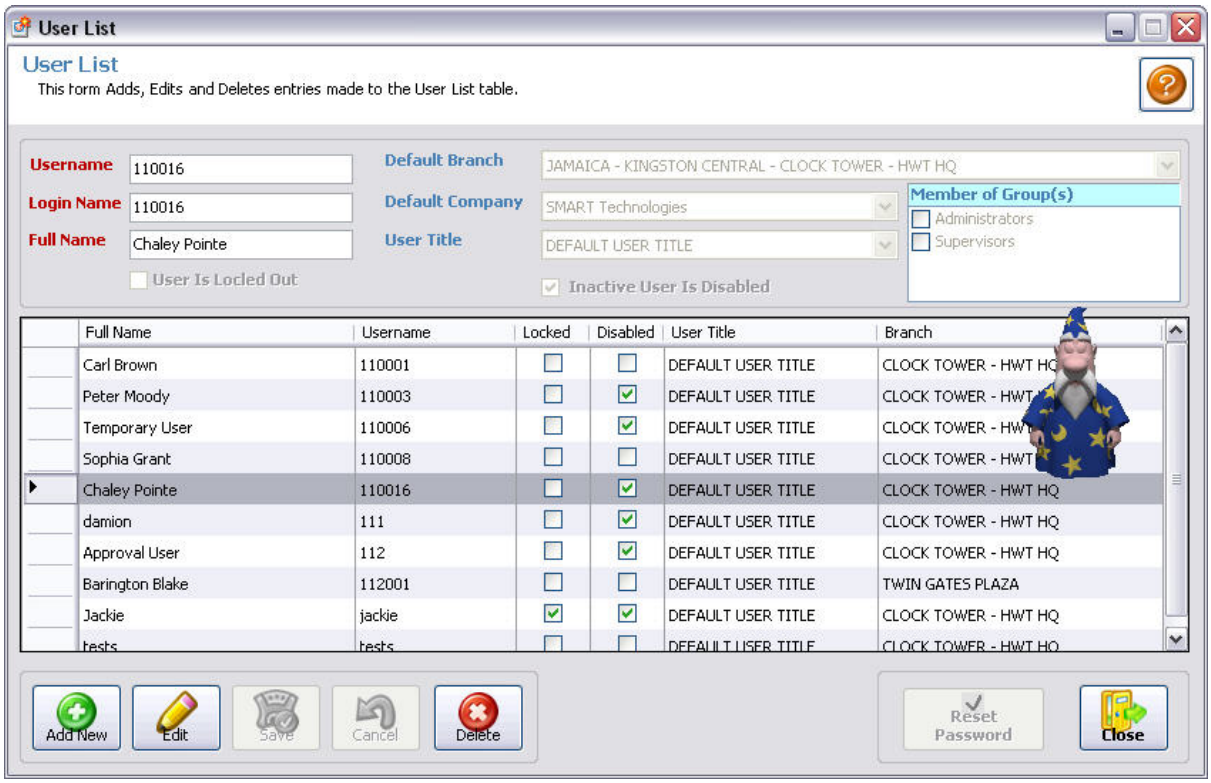


The updated information will now appear:

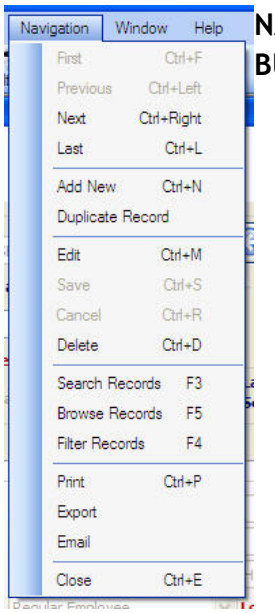


4.1.8.3 Users List

The User list form allows modification to each user of the SMART Staff Manager, Member can be enabled or disabled as necessary.



The Navigation toolbar and Menu contains functions for record navigation, record management, searching and printing to a printer, export file or email. See below for details of click on option for quick reference.



NAVIGATION BUTTONS

- o First
- o Previous
- o Next
- o Last

DATA ENTRY OPERATIONS

- o Add New
- o Duplicate
- o Edit
- o Save
- o Cancel
- o Delete
- o Cut, Copy & Paste

SEARCH OPTIONS

- o Page Size
- o Search
- o Browse
- o Filter

PRINTING

- o Print
- o Export
- o Email

NAVIGATION BUTTONS

These buttons are used to navigate records on a data entry screen.

First : First navigates to the first record in the full record (or filtered) list.
Previous : Previous navigates to one record previous to the current record on screen (like a back button). Current record -1
Next : Next navigates to one record next to the current record on screen (like a forward button). Current record +1
Last : Last navigates to the last record in the full record (or filtered) list.

CUT, COPY AND PASTE

The cut, copy and paste buttons works similar to the operations in the Windows operating system.

PAGE SIZE

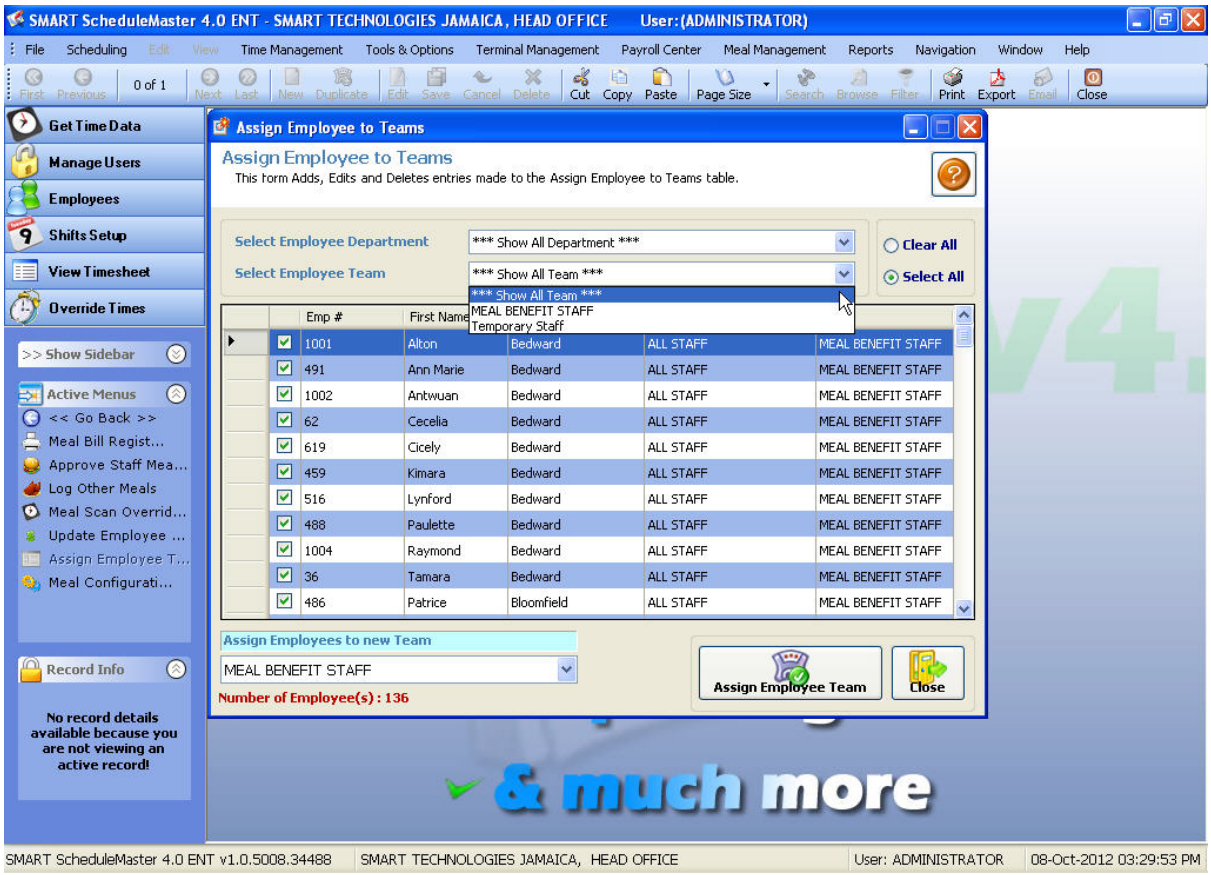
Page Size determines the maximum number of records that are retrieved from the database at any one time. This is an efficiency tool to improve performance. Eg. Opening the employee screen if set to maximum page size may pull up to 32,000 at once which may delay the application. Further, the user still have to browse, search or filter that list of find the desired record. Setting the page size to an optimal number or a low number will ensure all screens are opened promptly then the specified search will only return the desired records and not the entire record list.

Each user can set their desired page for data retrieval and it will apply to all data entry screens within the application.

HOW TO REFRESH DROP DOWN LISTS

When working in a particular screen, sometimes users will need to add/create new options within their drop down boxes. Here is an image of a screen prior to adding the new option in the drop down box:

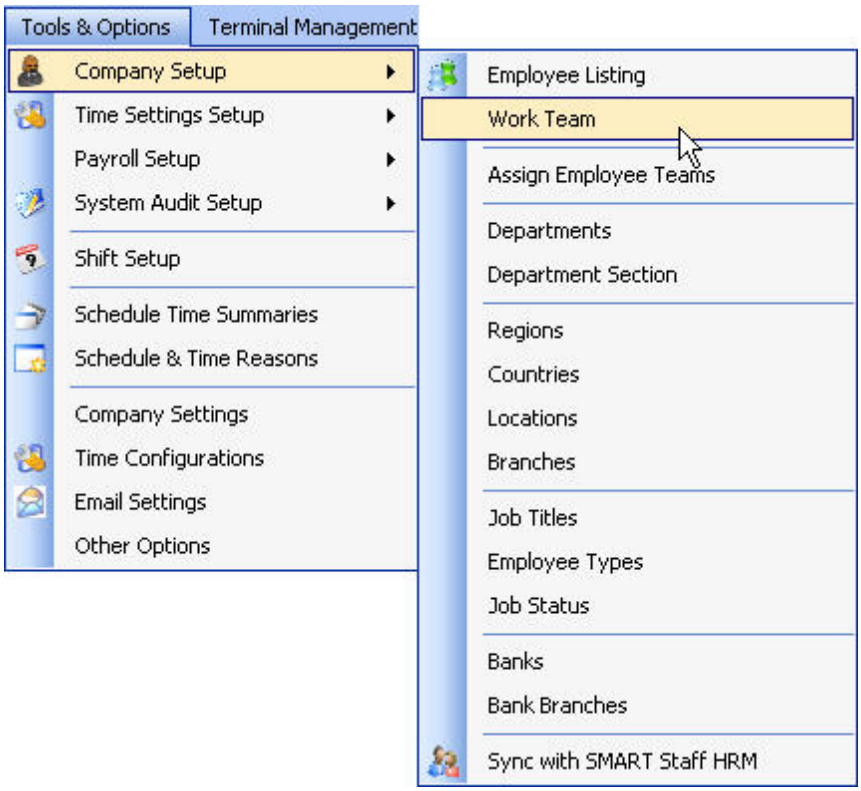
© 2014 Enter your company name



The process of adding options to a drop down box is carried out mostly in your Maintenance Menu. The user can simply minimize the current screen and open the relevant screen in the Maintenance Menu. They then proceed to add the relevant information for the drop down box and save. Once saved, they can return to the minimized screen and Refresh the list by right clicking on the drop down box and selecting Refresh List. The following screen shots detail the process:

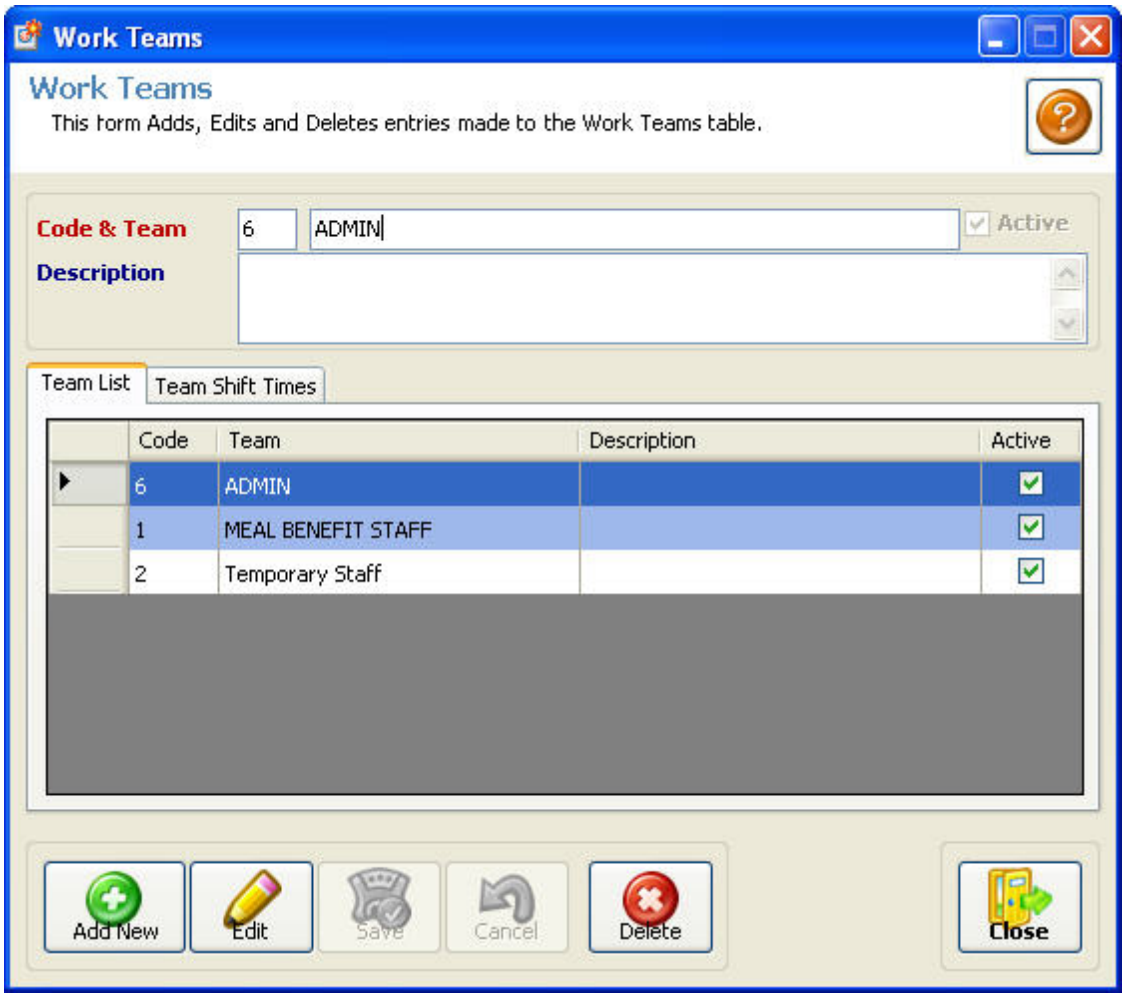
E.g. Adding A Work Team.

Step 1 - Minimize your current screen, then open the Work Team option in Company Setup under the Tools & Options Menu

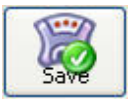


Step 2 - Click the ADD NEW button

Step 3 - Input the Code and Team Name

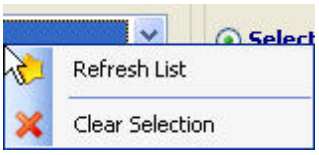


Step 4 - Save the Information

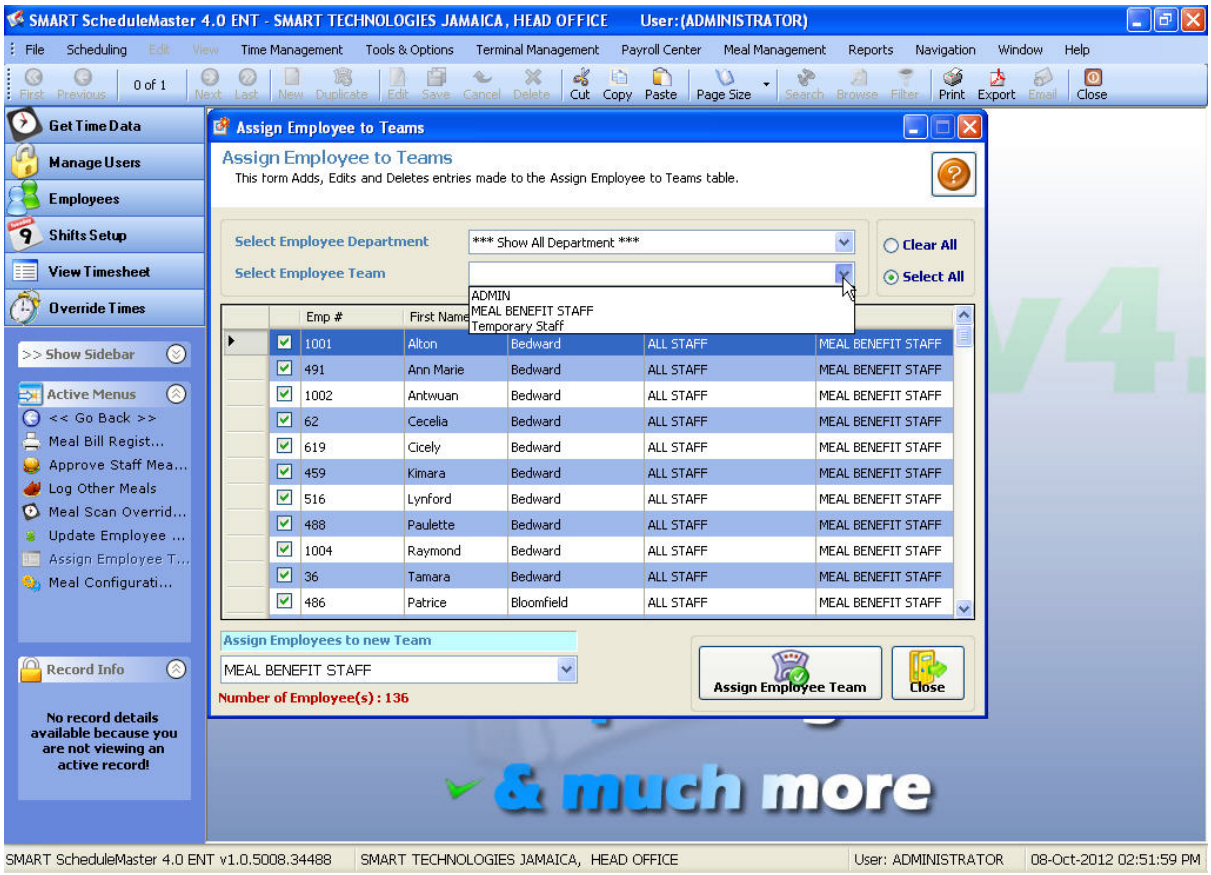


Step 5 - Return to the minimized screen and right click on the drop-down box

Step 6 - Click on Refresh List



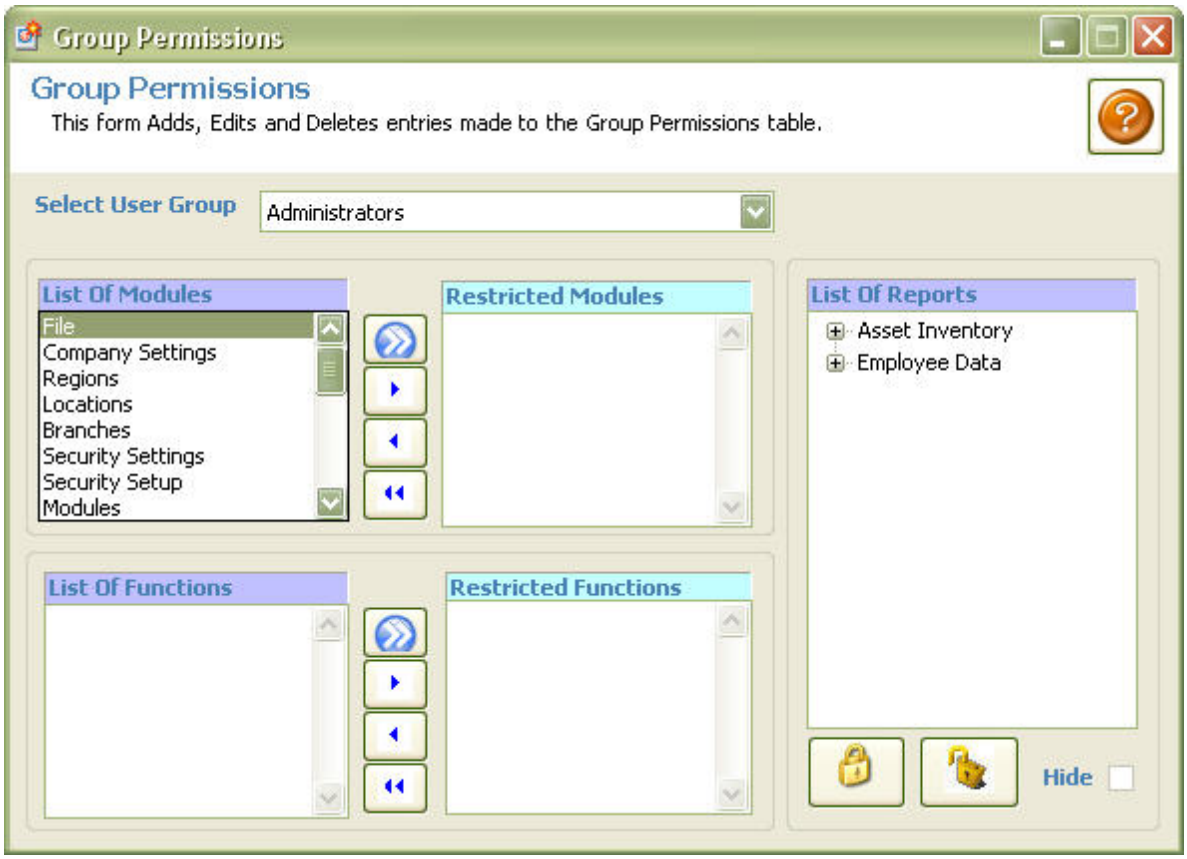
The updated information will now appear:

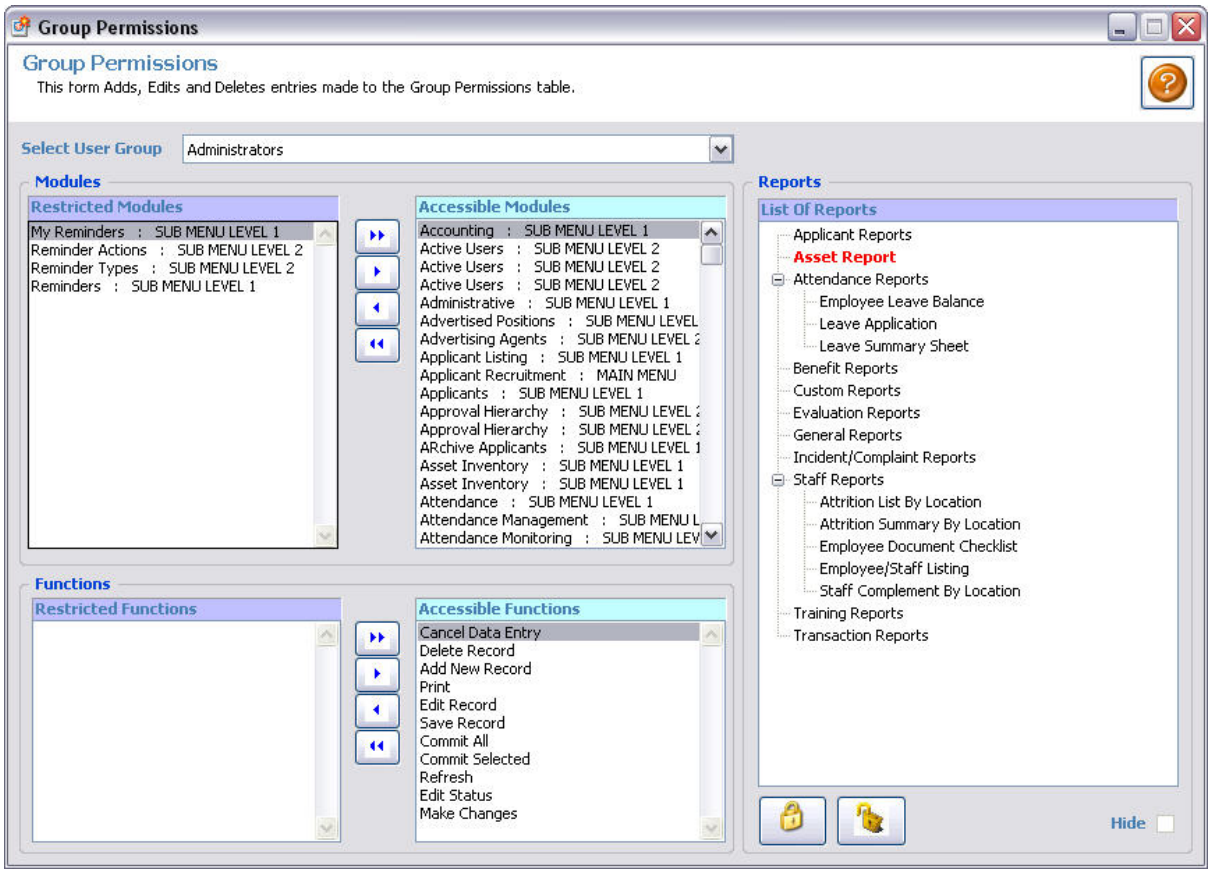


4.1.8.4 Group Permissions

Group Permissions feature offers even more security, Users of the SMART Staff manager can be placed in groups and rights to access can be given accordingly. This is very important in companies where different levels of managers will have access to the SMART Staff Manager. A specific group can be fine tuned to all just enough access in order to be productive, but not too much access where information is too sensitive (in the case of a lower level manager)

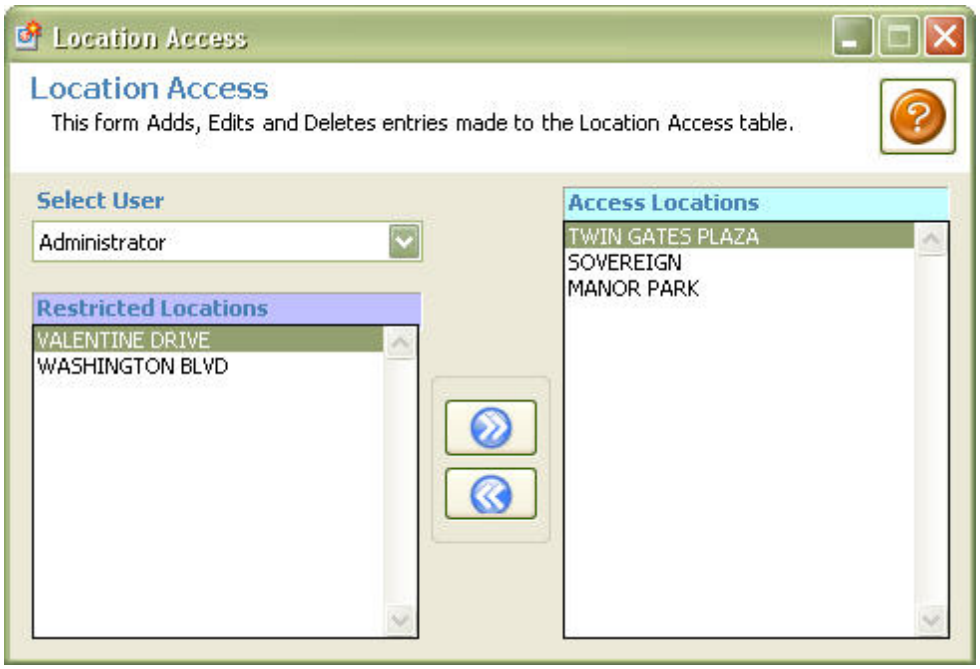
© 2014 Enter your company name


Group Permissions
Group Permissions
This form Adds, Edits and Deletes entries made to the Group Permissions table.
Select User Group
Administrators
List Of Modules
File
Company Settings
Regions
Locations
Branches
Security Settings
Security Setup
Modules
Restricted Modules
List Of Reports
Asset Inventory
Employee Data
List Of Functions
Restricted Functions
Hide



4.1.8.5 Location Access

Access can also be restricted by location, this forms allows the access/restriction of one location to another.
A selected user can be granted access to another locations database.



To allow access

Select the desired user class form the drop down list, then choose a location from the restricted locations lists and select the Right directional button to move

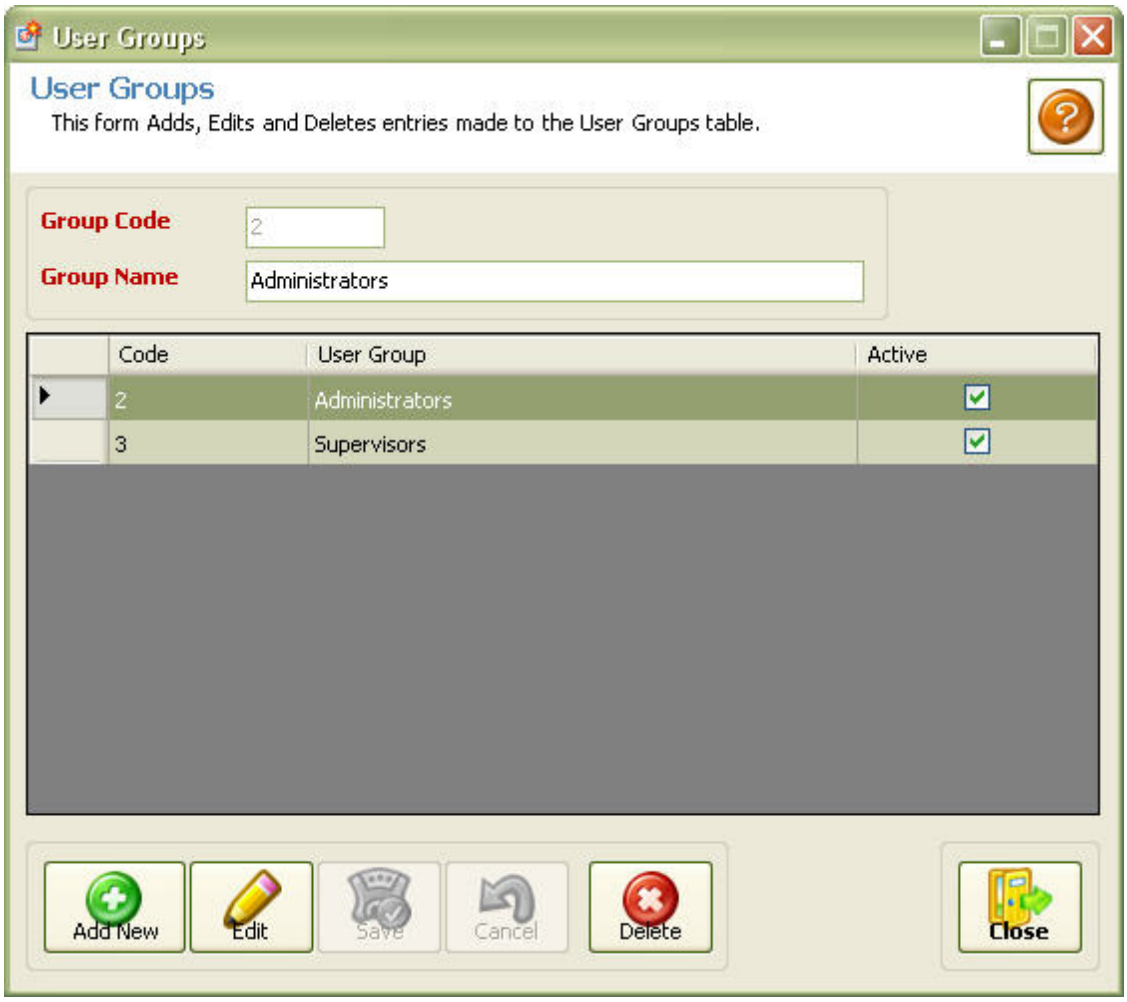
To Restrict access

Select the desired user class form the drop down list, then choose a location from the Allowed locations lists and select the Left directional button.

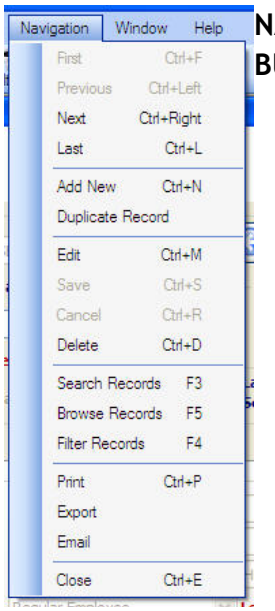
4.1.8.6 User Groups

Enter topic text here.

© 2014 Enter your company name



The Navigation toolbar and Menu contains functions for record navigation, record management, searching and printing to a printer, export file or email. See below for details of click on option for quick reference.



NAVIGATION BUTTONS
- o First
- o Previous
- o Next
- o Last

DATA ENTRY OPERATIONS
- o Add New
- o Duplicate
- o Edit
- o Save
- o Cancel
- o Delete
- o Cut, Copy & Paste

SEARCH OPTIONS
- o Page Size
- o Search
- o Browse
- o Filter

PRINTING
- o Print
- o Export
- o Email

NAVIGATION BUTTONS

These buttons are used to navigate records on a data entry screen.

First : First navigates to the first record in the full record (or filtered) list.
Previous : Previous navigates to one record previous to the current record on screen (like a back button). Current record -1
Next : Next navigates to one record next to the current record on screen (like a forward button). Current record +1
Last : Last navigates to the last record in the full record (or filtered) list.

CUT, COPY AND PASTE

The cut, copy and paste buttons works similar to the operations in the Windows operating system.

PAGE SIZE

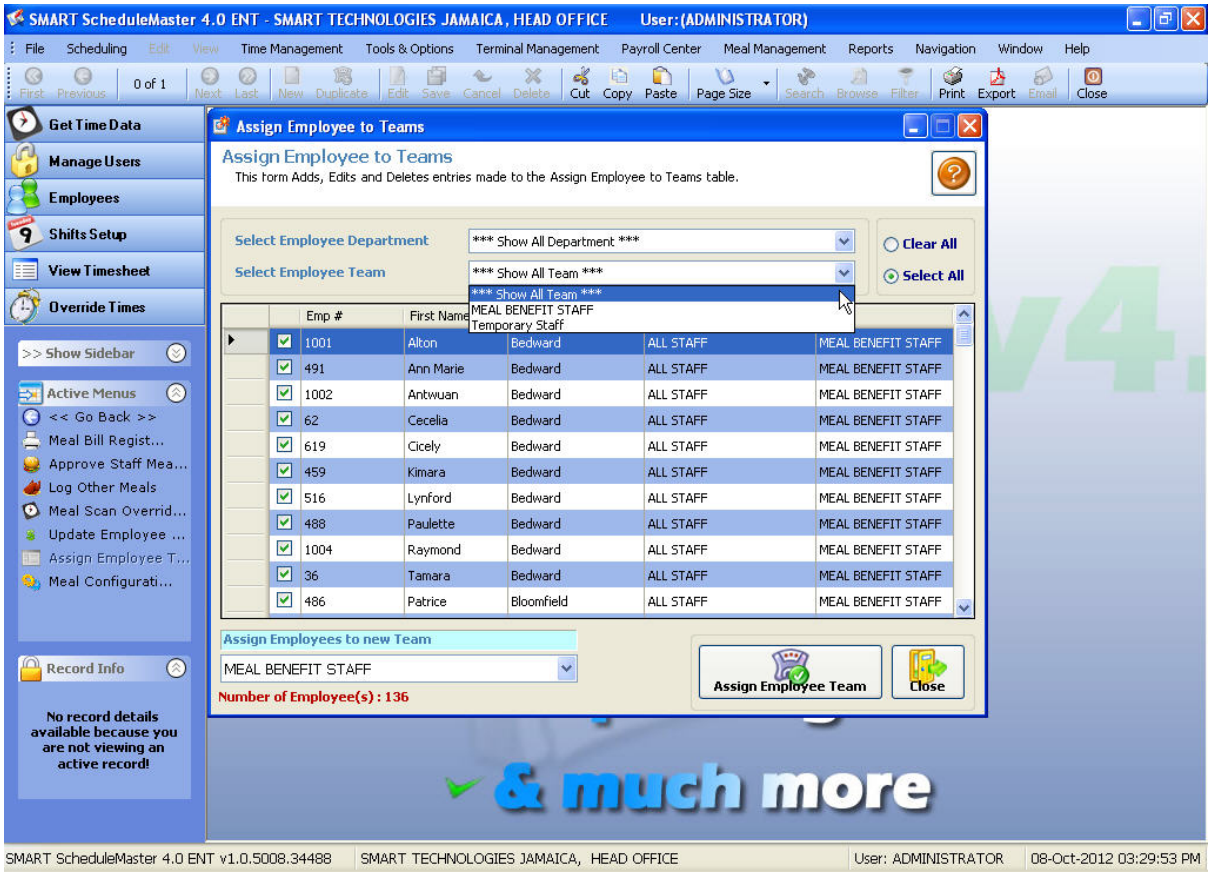
© 2014 Enter your company name

Page Size determines the maximum number of records that are retrieved from the database at any one time. This is an efficiency tool to improve performance. Eg. Opening the employee screen if set to maximum page size may pull up to 32,000 at once which may delay the application. Further, the user still have to browse, search or filter that list of find the desired record. Setting the page size to an optimal number or a low number will ensure all screens are opened promptly then the specified search will only return the desired records and not the entire record list.

Each user can set their desired page for data retrieval and it will apply to all data entry screens within the application.

HOW TO REFRESH DROP DOWN LISTS

When working in a particular screen, sometimes users will need to add/create new options within their drop down boxes. Here is an image of a screen prior to adding the new option in the drop down box:

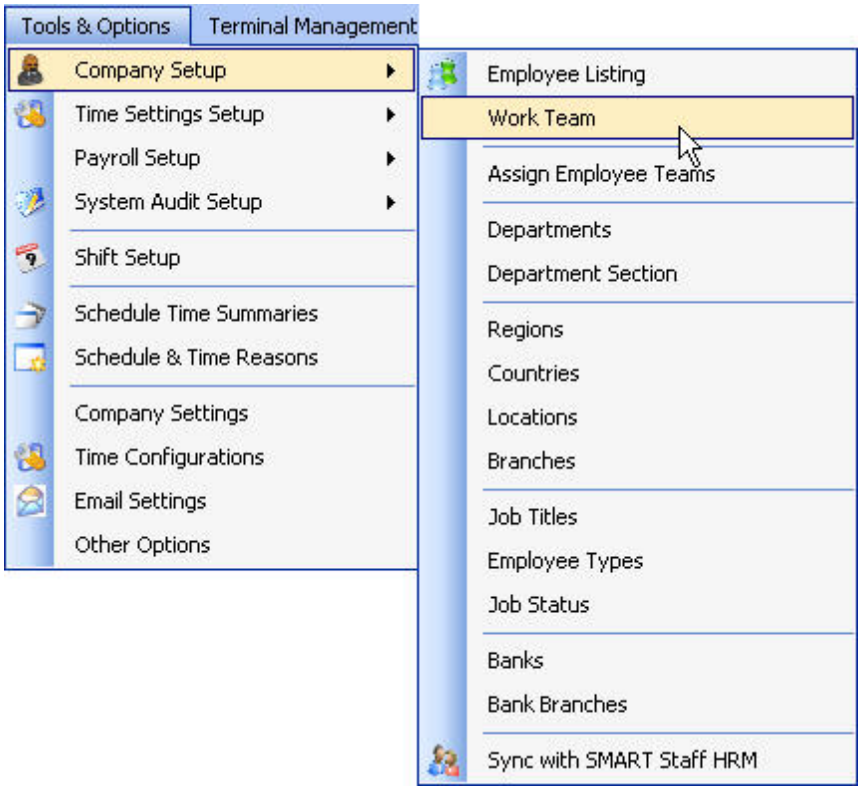


The process of adding options to a drop down box is carried out mostly in your

Maintenance Menu. The user can simply minimize the current screen and open the relevant screen in the Maintenance Menu. They then proceed to add the relevant information for the drop down box and save. Once saved, they can return to the minimized screen and Refresh the list by right clicking on the drop down box and selecting Refresh List. The following screen shots detail the process:

E.g. Adding A Work Team.

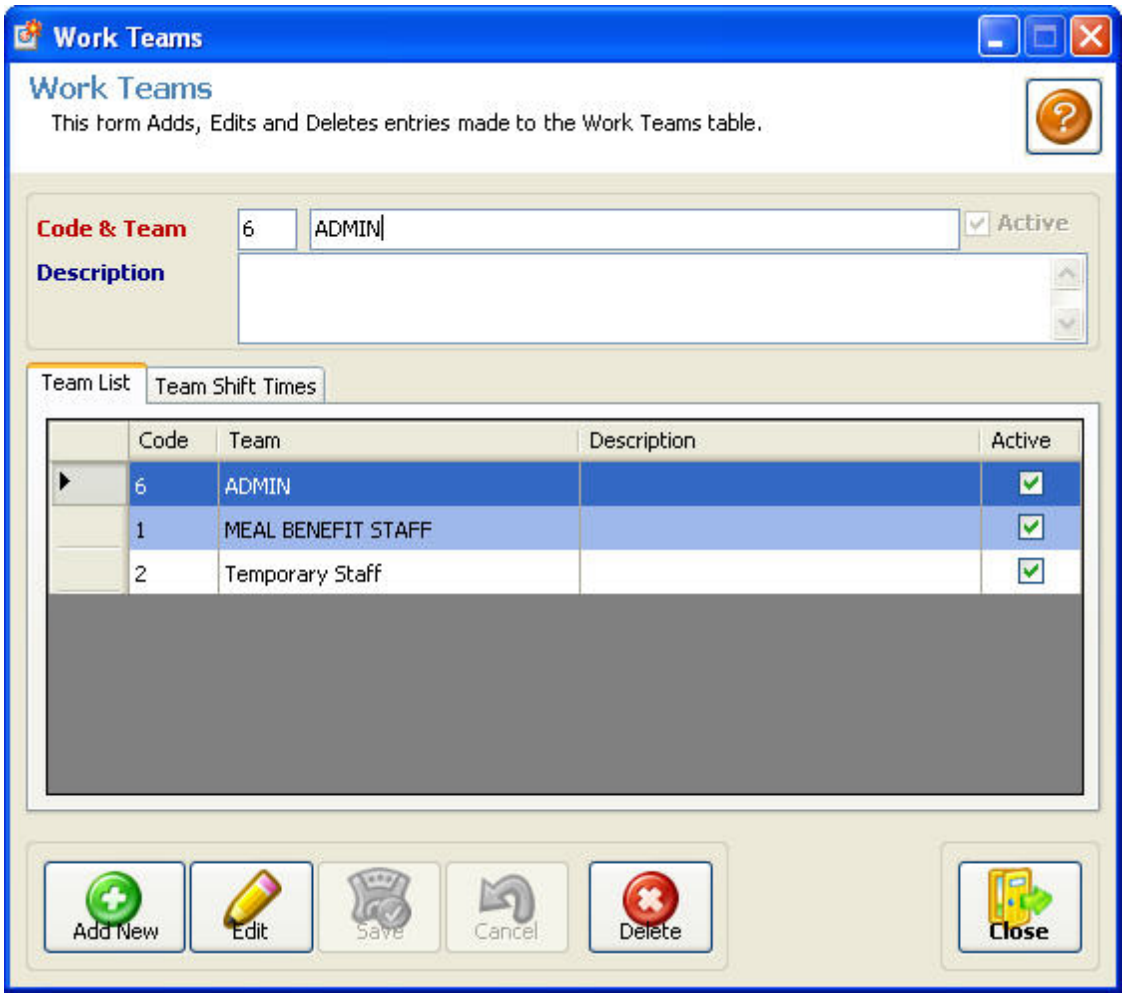
Step 1 - Minimize your current screen, then open the Work Team option in Company Setup under the Tools & Options Menu



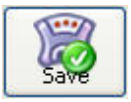
Step 2 - Click the ADD NEW button

Step 3 - Input the Code and Team Name

© 2014 Enter your company name

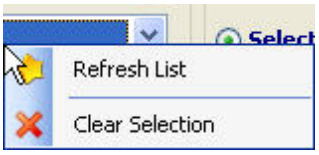


Step 4 - Save the Information

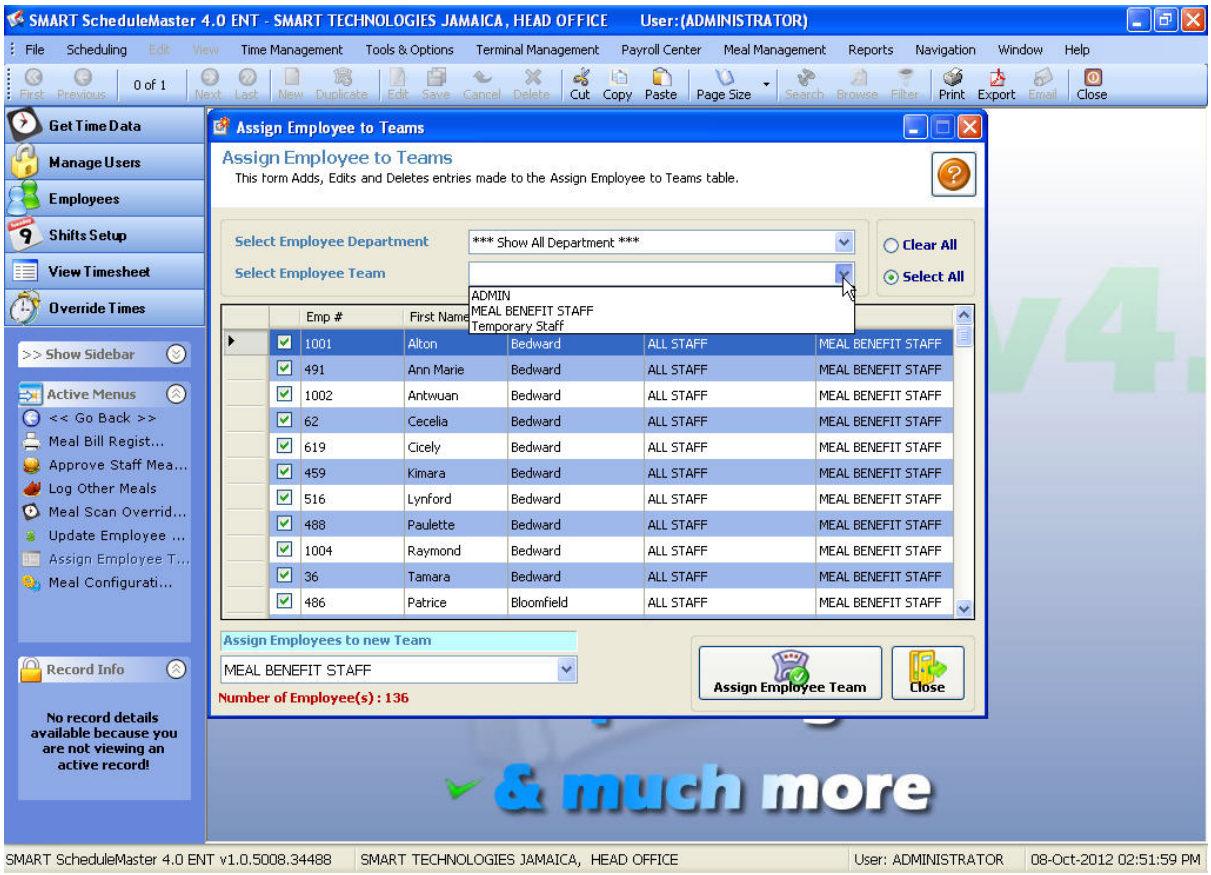


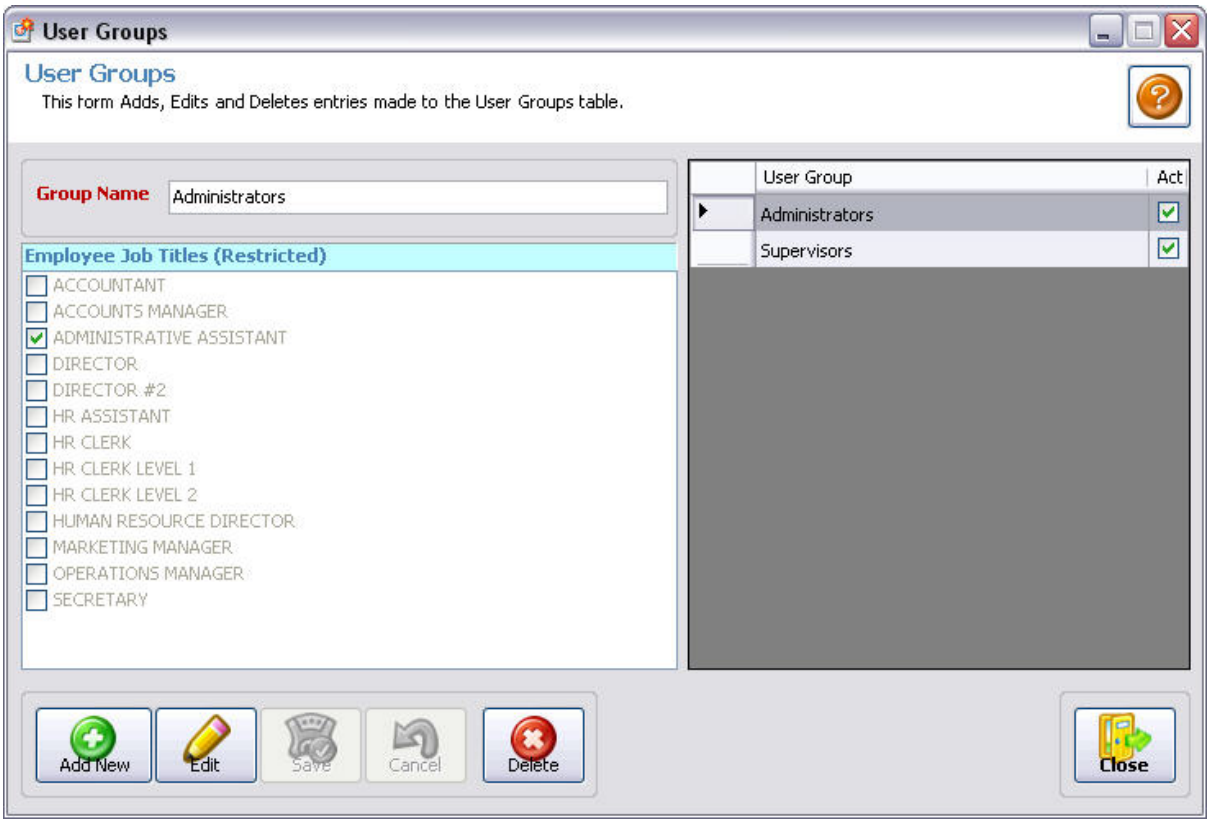
Step 5 - Return to the minimized screen and right click on the drop-down box

Step 6 - Click on Refresh List

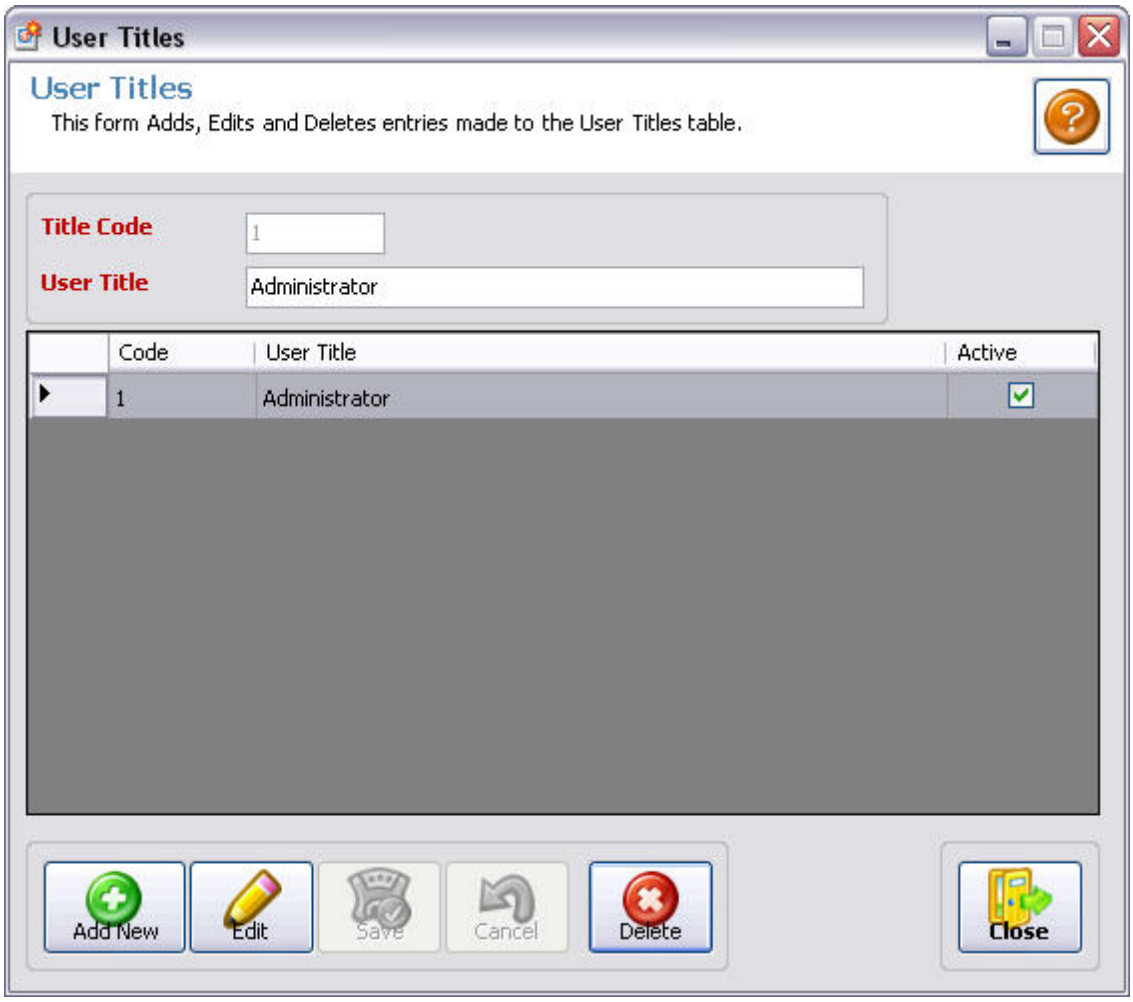


The updated information will now appear:

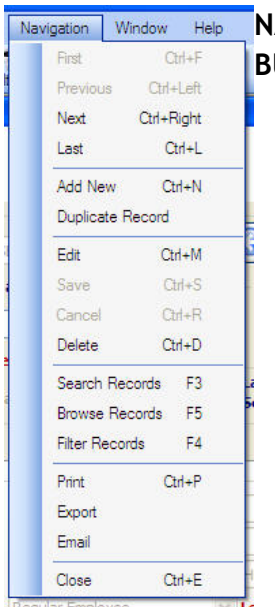

SMART ScheduleMaster 4.0 ENT - SMART TECHNOLOGIES JAMAICA, HEAD OFFICE User:(ADMINISTRATOR)
File Scheduling Edit View Time Management Tools & Options Terminal Management Payroll Center Meal Management Reports Navigation Window Help
First Previous 0 of 1 Next Last New Duplicate Edit Save Cancel Delete Cut Copy Paste Page Size Search Browse Filter Print Export Email Close
Get Time Data
Manage Users
Employees
Shifts Setup
View Timesheet
Override Times
>> Show Sidebar
Active Menus
<< Go Back >>
Meal Bill Regist...
Approve Staff Mea...
Log Other Meals
Meal Scan Overrid...
Update Employee ...
Assign Employee T...
Meal Configurati...
Record Info
No record details available because you are not viewing an active record!
Assign Employee to Teams
Assign Employee to Teams
This form Adds, Edits and Deletes entries made to the Assign Employee to Teams table.
Select Employee Department
*** Show All Department ***
Select Employee Team
ADMIN
MEAL BENEFIT STAFF
Temporary Staff
Clear All
Select All
Emp # First Name
1001 Alton Bedward ALL STAFF MEAL BENEFIT STAFF
491 Ann Marie Bedward ALL STAFF MEAL BENEFIT STAFF
1002 Antwuan Bedward ALL STAFF MEAL BENEFIT STAFF
62 Cecelia Bedward ALL STAFF MEAL BENEFIT STAFF
619 Cicely Bedward ALL STAFF MEAL BENEFIT STAFF
459 Kimara Bedward ALL STAFF MEAL BENEFIT STAFF
516 Lynford Bedward ALL STAFF MEAL BENEFIT STAFF
488 Paulette Bedward ALL STAFF MEAL BENEFIT STAFF
1004 Raymond Bedward ALL STAFF MEAL BENEFIT STAFF
36 Tamara Bedward ALL STAFF MEAL BENEFIT STAFF
486 Patrice Bloomfield ALL STAFF MEAL BENEFIT STAFF
Assign Employees to new Team
MEAL BENEFIT STAFF
Number of Employee(s) : 136
Assign Employee Team
Close
& much more
SMART ScheduleMaster 4.0 ENT v1.0.5008.34488
SMART TECHNOLOGIES JAMAICA, HEAD OFFICE
User: ADMINISTRATOR
08-Oct-2012 02:51:59 PM



4.1.8.7 User Titles



The Navigation toolbar and Menu contains functions for record navigation, record management, searching and printing to a printer, export file or email. See below for details of click on option for quick reference.



NAVIGATION BUTTONS
- o First
- o Previous
- o Next
- o Last

DATA ENTRY OPERATIONS
- o Add New
- o Duplicate
- o Edit
- o Save
- o Cancel
- o Delete
- o Cut, Copy & Paste

SEARCH OPTIONS
- o Page Size
- o Search
- o Browse
- o Filter

PRINTING
- o Print
- o Export
- o Email

NAVIGATION BUTTONS

These buttons are used to navigate records on a data entry screen.

First : First navigates to the first record in the full record (or filtered) list.
Previous : Previous navigates to one record previous to the current record on screen (like a back button). Current record -1
Next : Next navigates to one record next to the current record on screen (like a forward button). Current record +1
Last : Last navigates to the last record in the full record (or filtered) list.

CUT, COPY AND PASTE

The cut, copy and paste buttons works similar to the operations in the Windows operating system.

PAGE SIZE

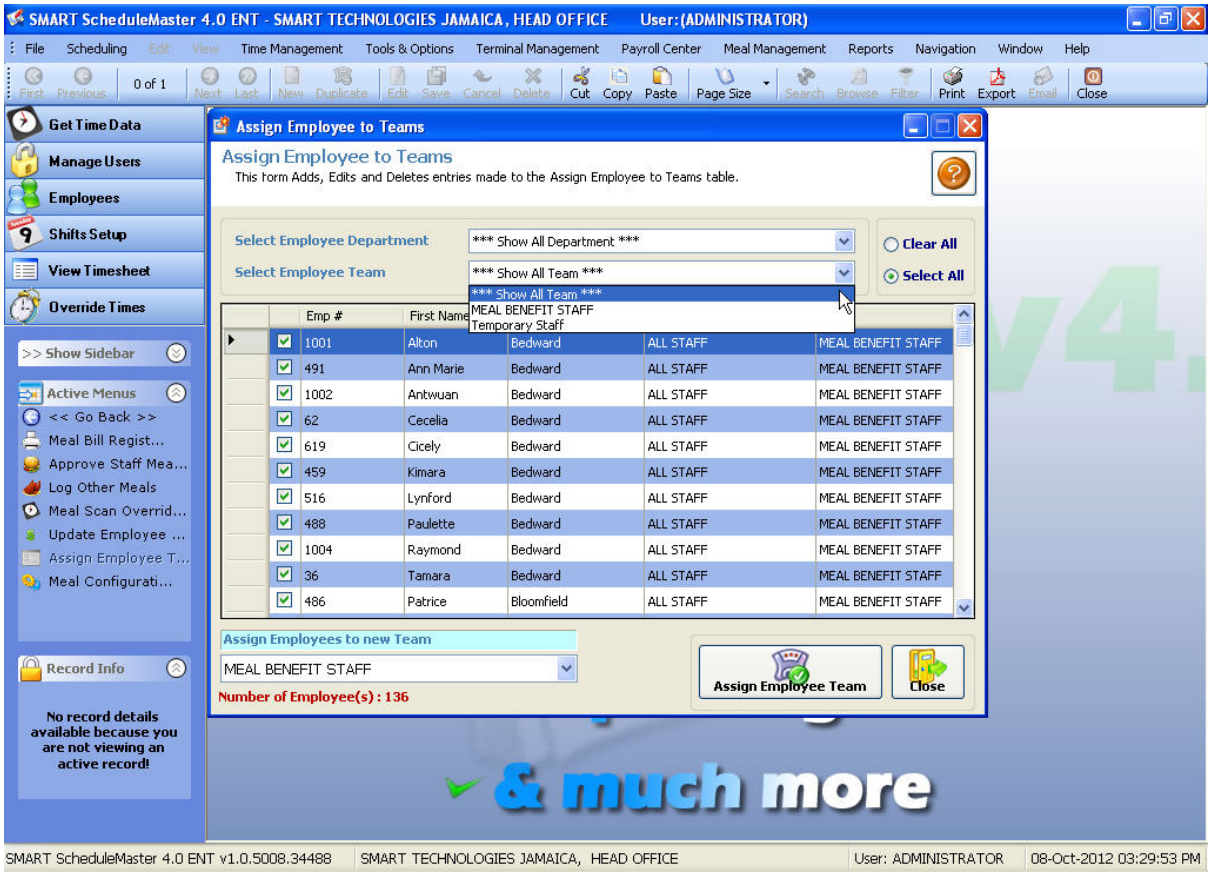
© 2014 Enter your company name

Page Size determines the maximum number of records that are retrieved from the database at any one time. This is an efficiency tool to improve performance. Eg. Opening the employee screen if set to maximum page size may pull up to 32,000 at once which may delay the application. Further, the user still have to browse, search or filter that list of find the desired record. Setting the page size to an optimal number or a low number will ensure all screens are opened promptly then the specified search will only return the desired records and not the entire record list.

Each user can set their desired page for data retrieval and it will apply to all data entry screens within the application.

HOW TO REFRESH DROP DOWN LISTS

When working in a particular screen, sometimes users will need to add/create new options within their drop down boxes. Here is an image of a screen prior to adding the new option in the drop down box:

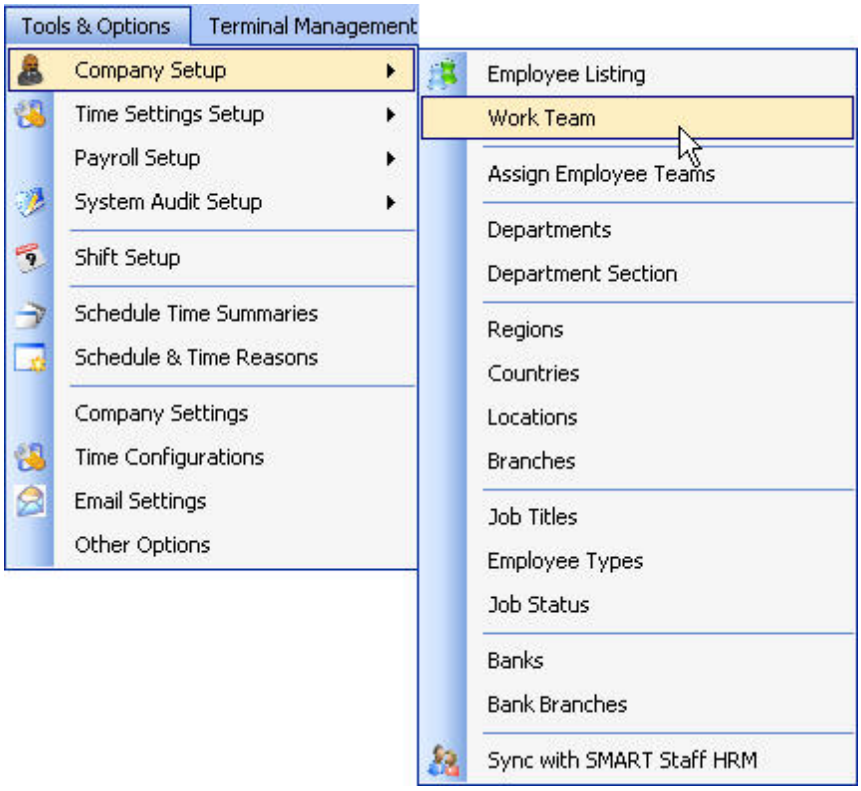


The process of adding options to a drop down box is carried out mostly in your

Maintenance Menu. The user can simply minimize the current screen and open the relevant screen in the Maintenance Menu. They then proceed to add the relevant information for the drop down box and save. Once saved, they can return to the minimized screen and Refresh the list by right clicking on the drop down box and selecting Refresh List. The following screen shots detail the process:

E.g. Adding A Work Team.

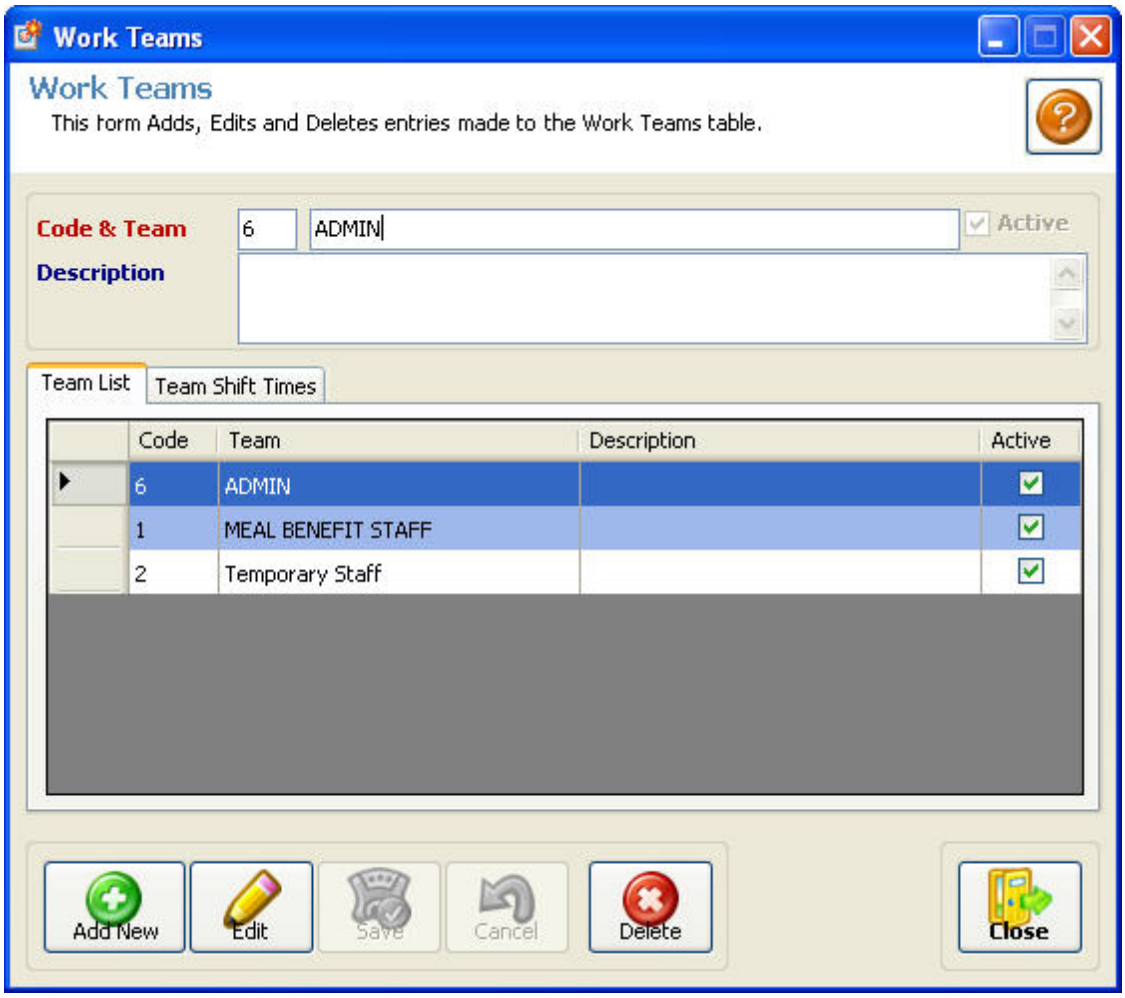
Step 1 - Minimize your current screen, then open the Work Team option in Company Setup under the Tools & Options Menu



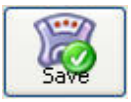
Step 2 - Click the ADD NEW button

Step 3 - Input the Code and Team Name

© 2014 Enter your company name

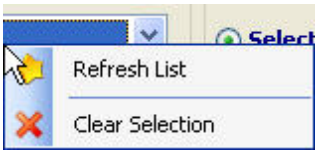


Step 4 - Save the Information

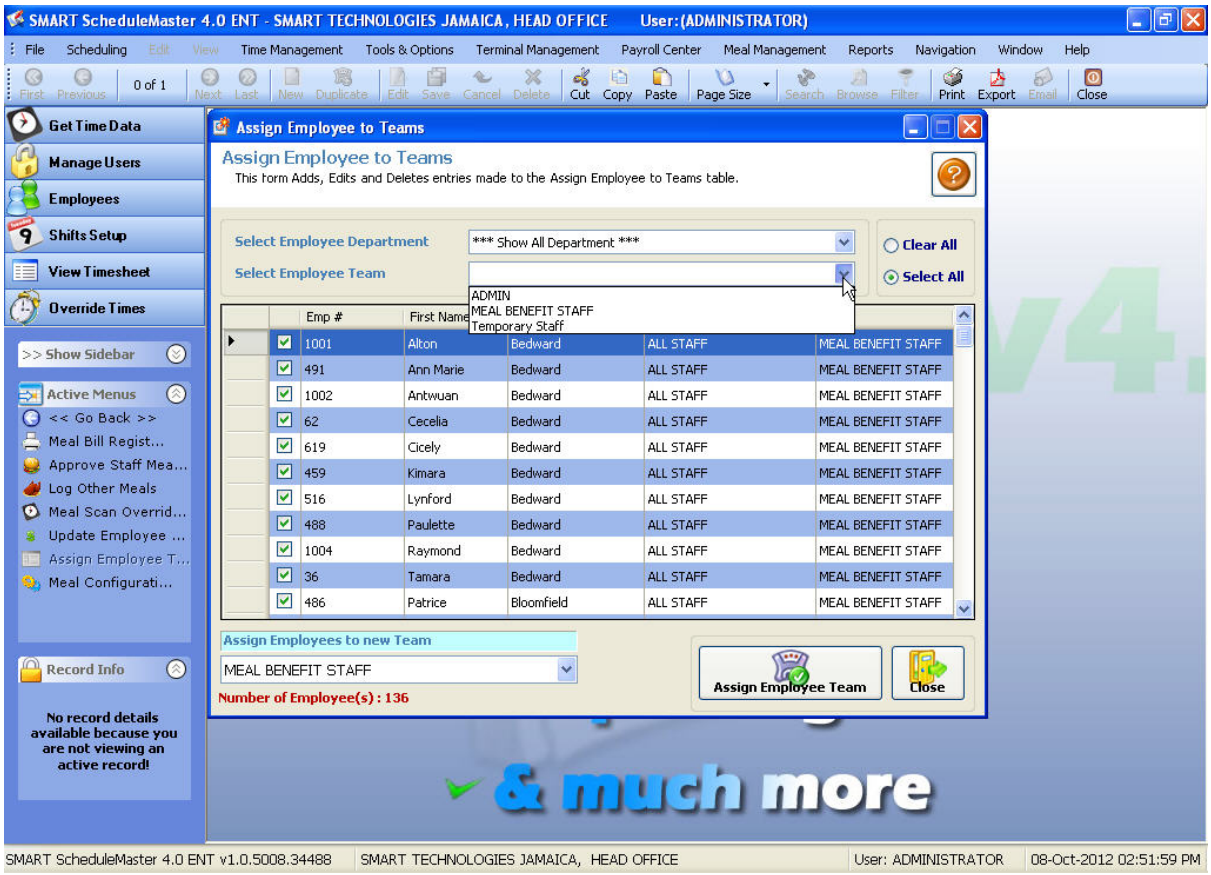


Step 5 - Return to the minimized screen and right click on the drop-down box

Step 6 - Click on Refresh List



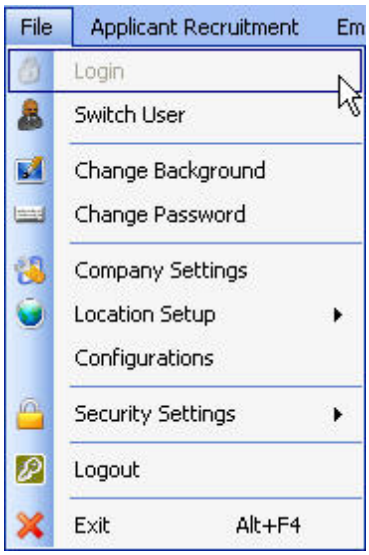
The updated information will now appear:



4.1.9 Logout

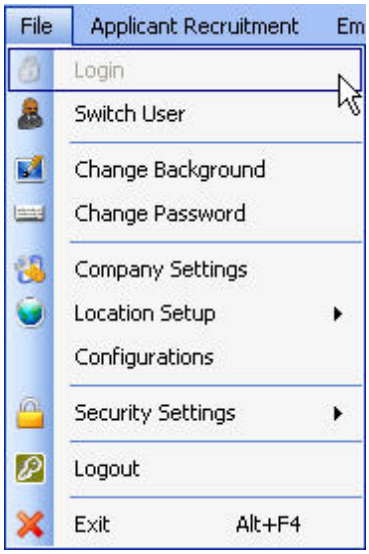
Allows users to safely close the program before exiting. Ideal for end of day shut down process or whenever the user will not be physically at the workstation to monitor the use of the program. This also protects the program from misuse.

© 2014 Enter your company name



4.1.10 Exit

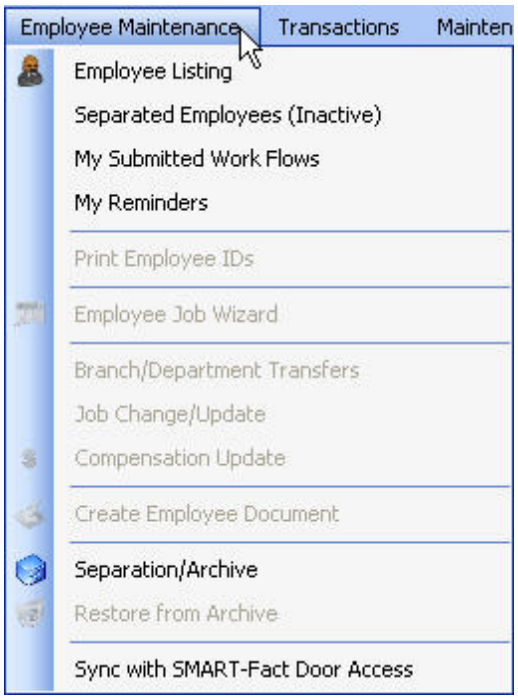
Use of the Exit option is the ideal shut down process for the SMART Staff program. This is the ideal way to close the program as is safely closes off the activity and background processes of the program before ending.



4.2 Employee Module

This form allows for maintenance to the each element of the employees database. Information submitted to this form and all it's subcategories include but is not limited to: an employee's training history, personal information, assets issued to them, their skills and emergency contacts.

© 2014 Enter your company name



Related Topics:

Employee Listing
Separated Employees (Inactive)
My Submitted Work Flows
My Reminders
Print Employee IDs
Employee Job Wizard
Branch/Department Transfers
Job Change/Update
Compensation Update
Create Employee Document
Separation Archive
Restore From Archive
Sync Wih SMARTFact Door

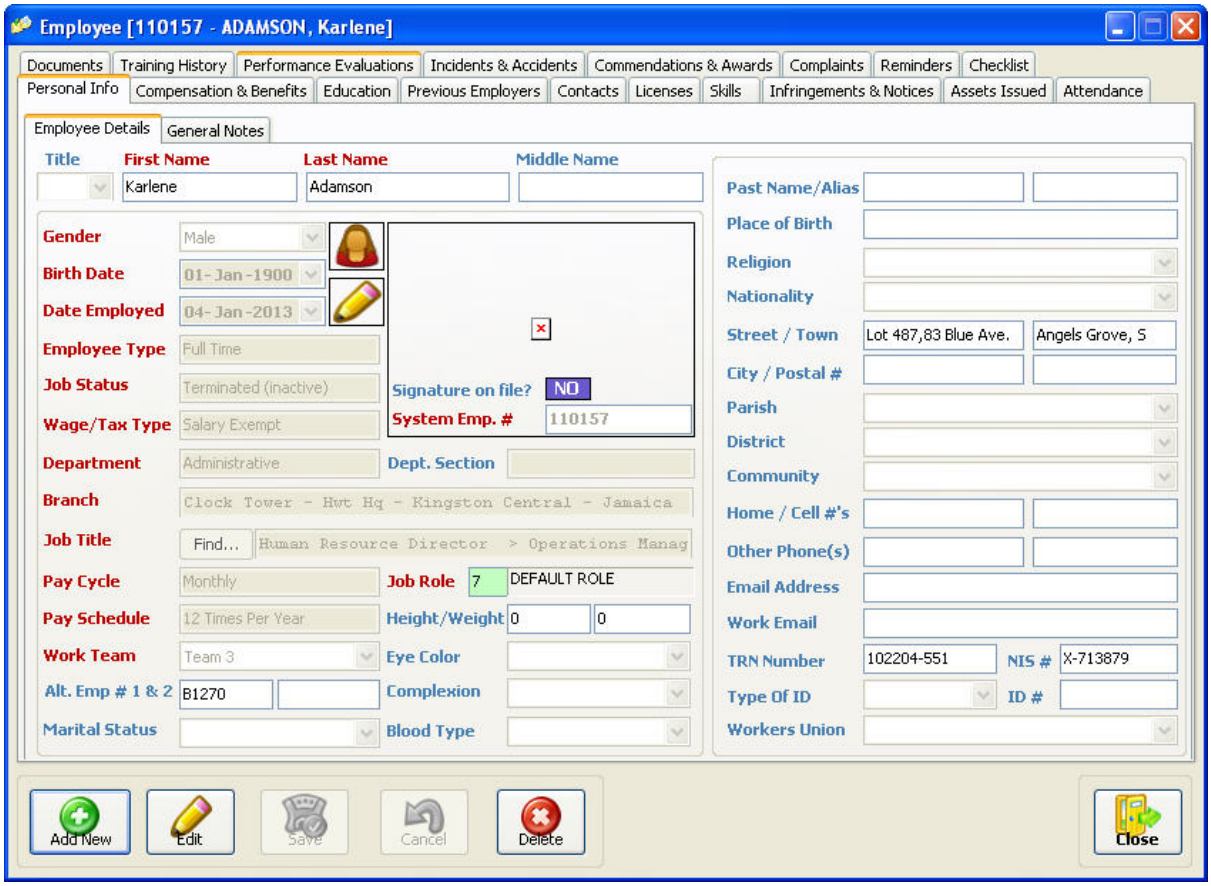
4.2.1 Employee Listing/Details

Employee listing or the Employee details form lays out the information related to each employee. This is a very detailed file which is comprised of multiple tabs ranging from personal Info to training history. This form also allows a new staff member to be added

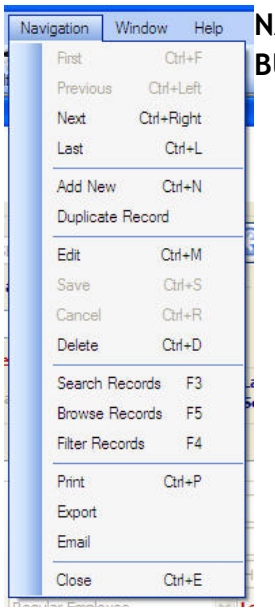
© 2014 Enter your company name

to the company's database.

All Fields in **Red** are mandatory



The Navigation toolbar and Menu contains functions for record navigation, record management, searching and printing to a printer, export file or email. See below for details of click on option for quick reference.



NAVIGATION BUTTONS
- o First
- o Previous
- o Next
- o Last

DATA ENTRY OPERATIONS
- o Add New
- o Duplicate
- o Edit
- o Save
- o Cancel
- o Delete
- o Cut, Copy & Paste

SEARCH OPTIONS
- o Page Size
- o Search
- o Browse
- o Filter

PRINTING
- o Print
- o Export
- o Email

NAVIGATION BUTTONS

These buttons are used to navigate records on a data entry screen.

First : First navigates to the first record in the full record (or filtered) list.
Previous : Previous navigates to one record previous to the current record on screen (like a back button). Current record -1
Next : Next navigates to one record next to the current record on screen (like a forward button). Current record +1
Last : Last navigates to the last record in the full record (or filtered) list.

CUT, COPY AND PASTE

The cut, copy and paste buttons works similar to the operations in the Windows operating system.

PAGE SIZE

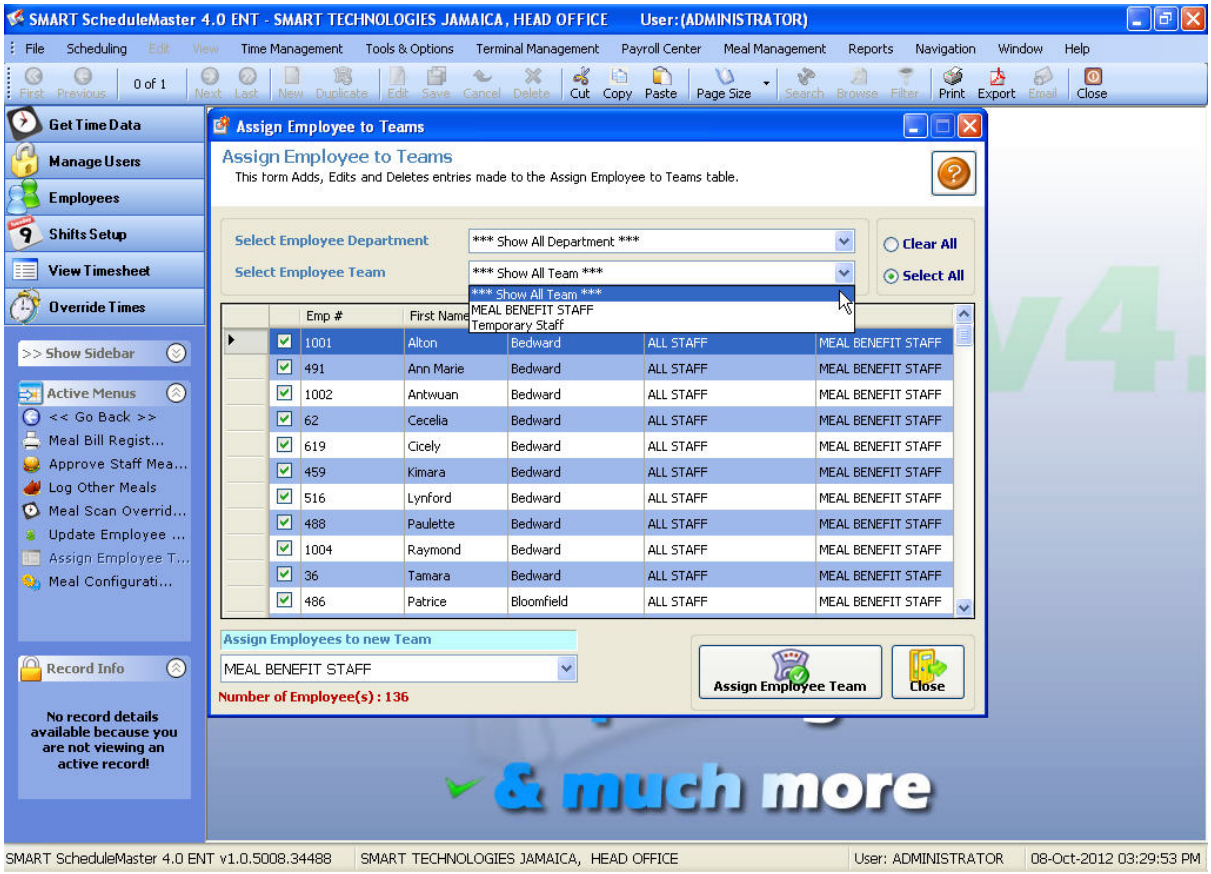
© 2014 Enter your company name

Page Size determines the maximum number of records that are retrieved from the database at any one time. This is an efficiency tool to improve performance. Eg. Opening the employee screen if set to maximum page size may pull up to 32,000 at once which may delay the application. Further, the user still have to browse, search or filter that list of find the desired record. Setting the page size to an optimal number or a low number will ensure all screens are opened promptly then the specified search will only return the desired records and not the entire record list.

Each user can set their desired page for data retrieval and it will apply to all data entry screens within the application.

HOW TO REFRESH DROP DOWN LISTS

When working in a particular screen, sometimes users will need to add/create new options within their drop down boxes. Here is an image of a screen prior to adding the new option in the drop down box:

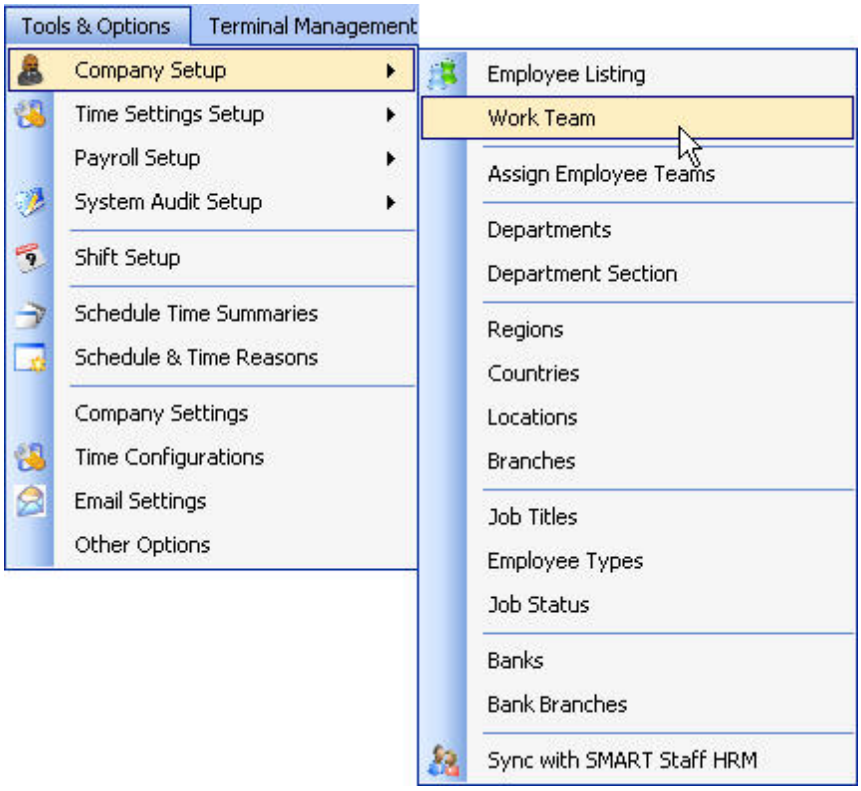


The process of adding options to a drop down box is carried out mostly in your

Maintenance Menu. The user can simply minimize the current screen and open the relevant screen in the Maintenance Menu. They then proceed to add the relevant information for the drop down box and save. Once saved, they can return to the minimized screen and Refresh the list by right clicking on the drop down box and selecting Refresh List. The following screen shots detail the process:

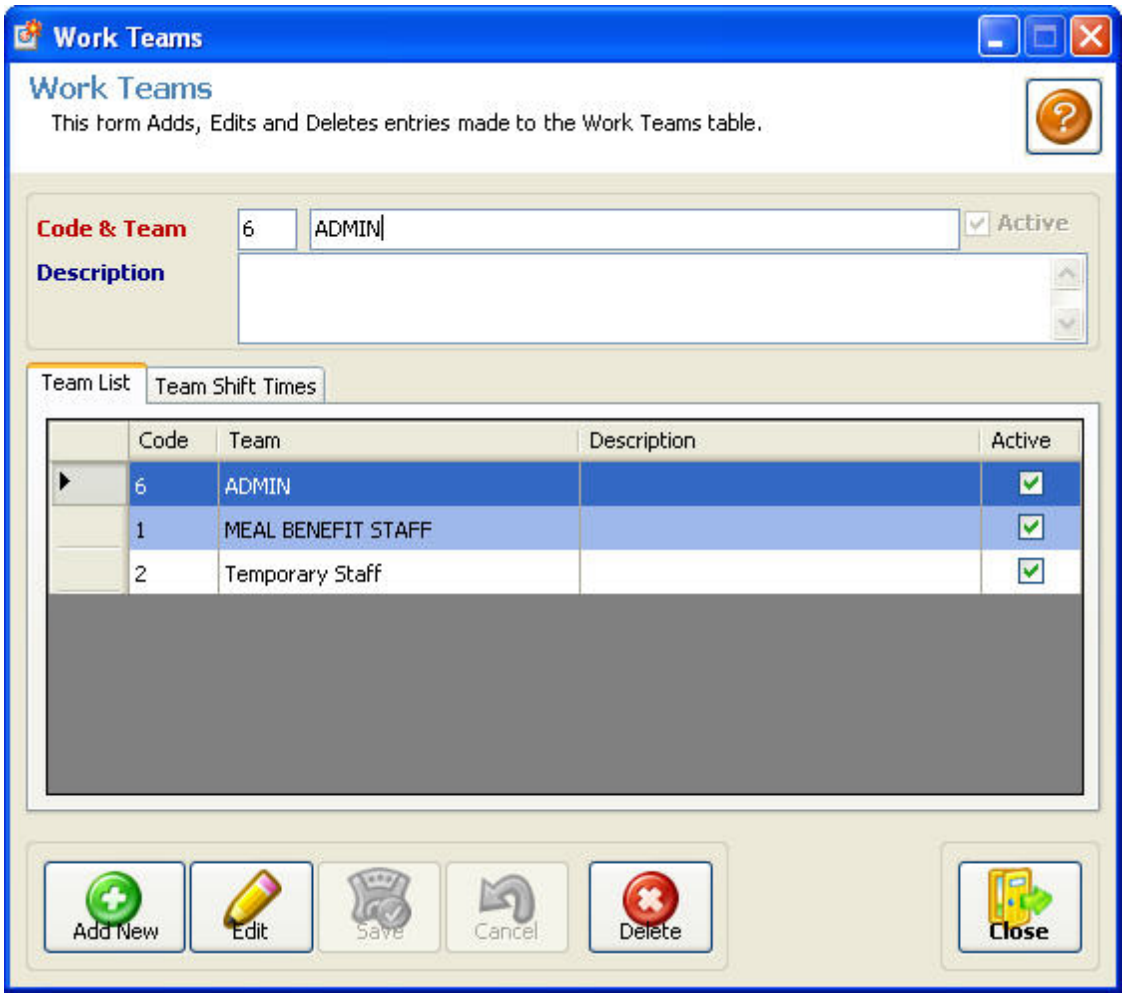
E.g. Adding A Work Team.

Step 1 - Minimize your current screen, then open the Work Team option in Company Setup under the Tools & Options Menu

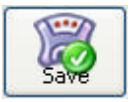


Step 2 - Click the ADD NEW button

Step 3 - Input the Code and Team Name

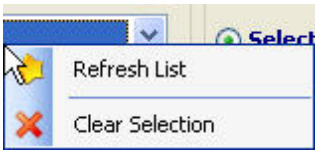


Step 4 - Save the Information

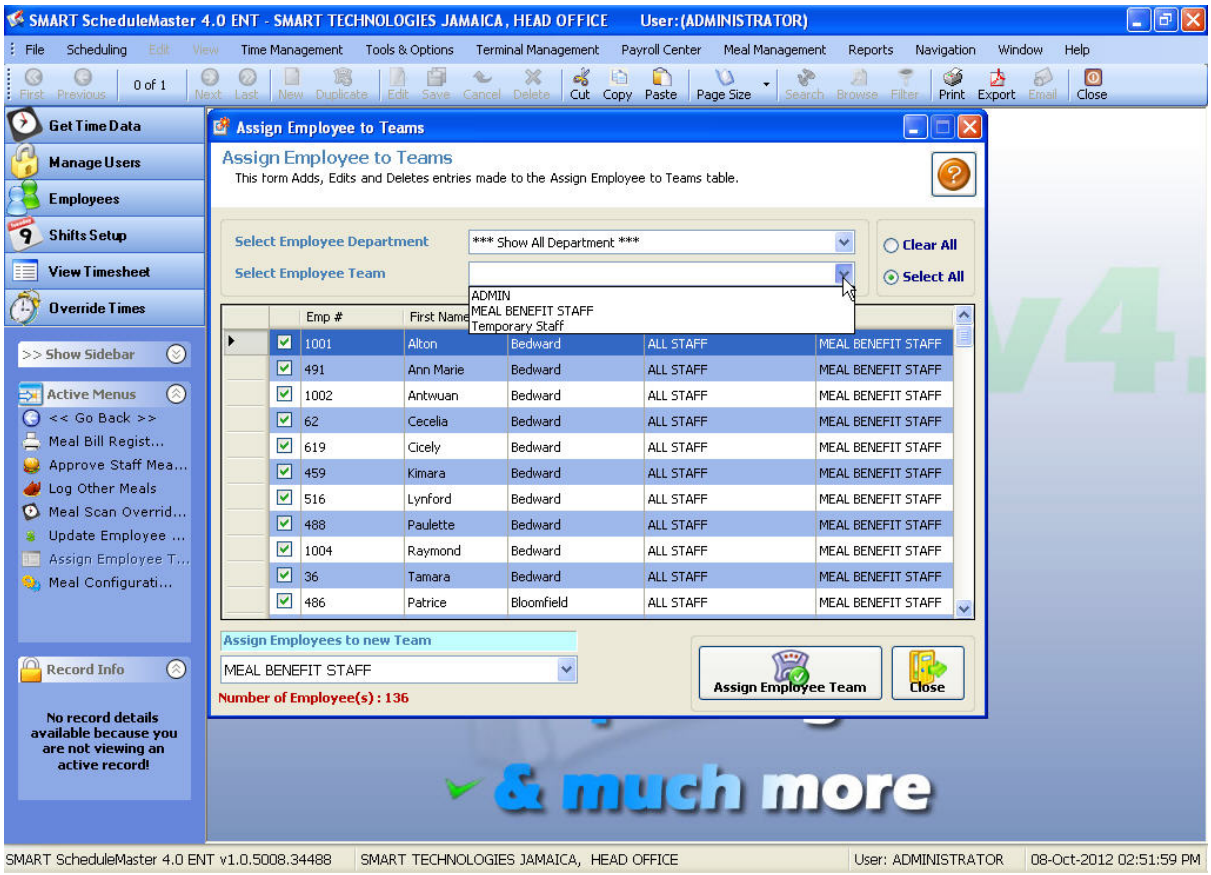


Step 5 - Return to the minimized screen and right click on the drop-down box

Step 6 - Click on Refresh List

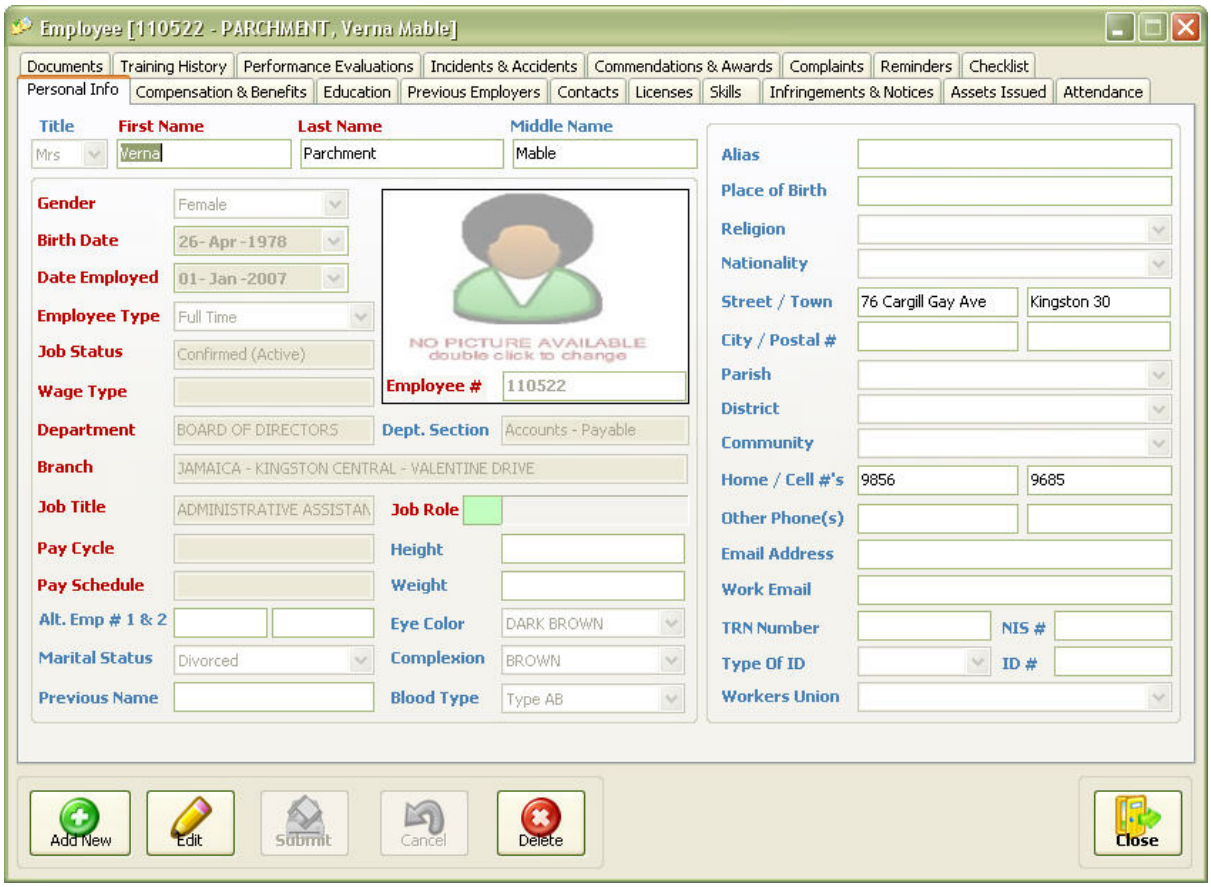


The updated information will now appear:



4.2.1.1 Personal Information

This form maintains the basic information on the applicant. Data submitted must include the following: name, gender, branch placement, job title and role, application date, Employee type, phone numbers and email address.

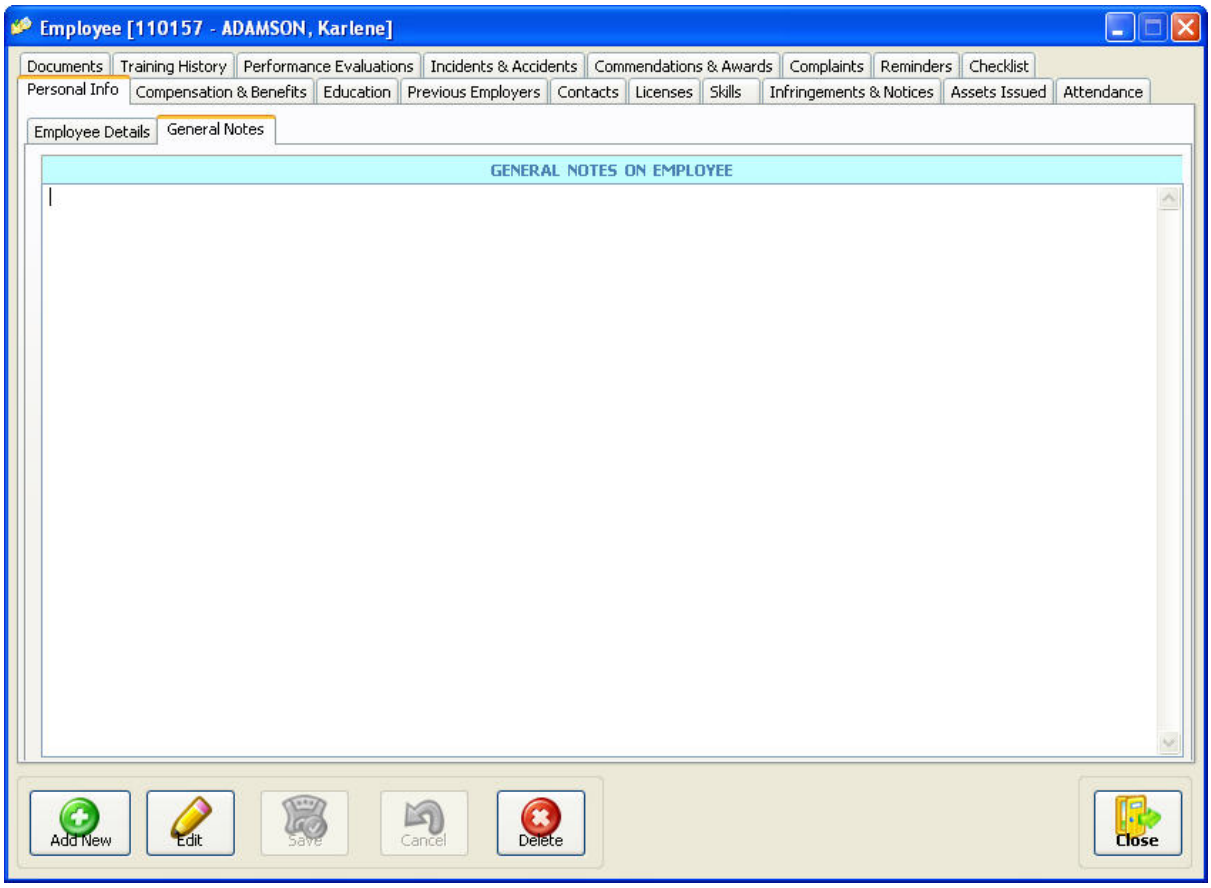


See Add Edit and Delete to learn how to enter information in this screen

Remember to Save Cancel or Close when done!!

4.2.1.1.1 General Notes

General Notes consists of details about an employee, this forms has a text box to facilitate special notes.



See Add Edit and Delete to learn how to enter information in this screen

Remember to Save Cancel or Close when done!!

4.2.1.2 Compensation & Benefits

This form maintains a list of benefits and compensation offered to members of staff. The form is broken down into the following categories: Job History, Compensation, Contract History, Payments, Deductions, Benefits.

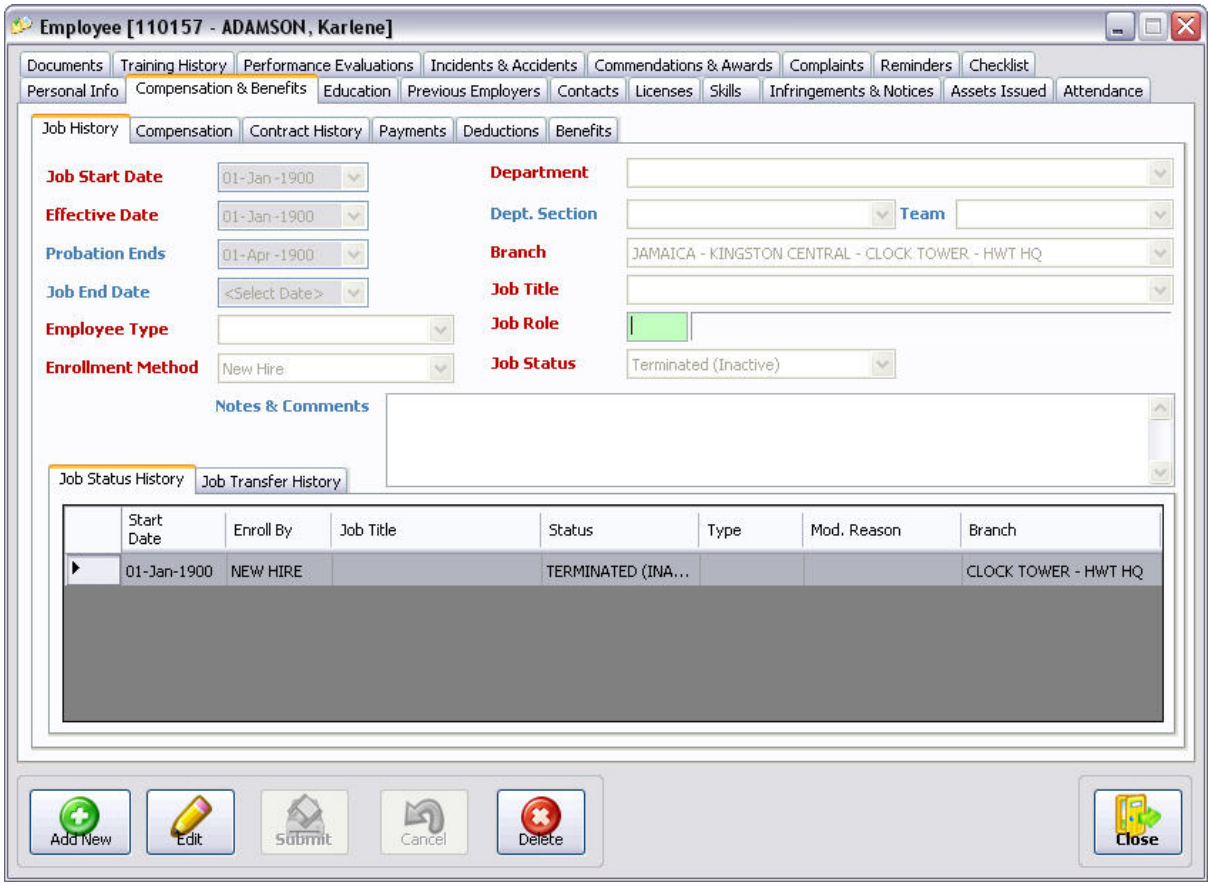
4.2.1.2.1 Job History

This maintains the individual's employment history. Data submitted must include but is not limited to job title and role, job start date and enrollment method for the employee.

Also, if an employee has been promoted or moved to a new department you can also change the effective date to the date which the employee actively starts working in the new position.

© 2014 Enter your company name

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

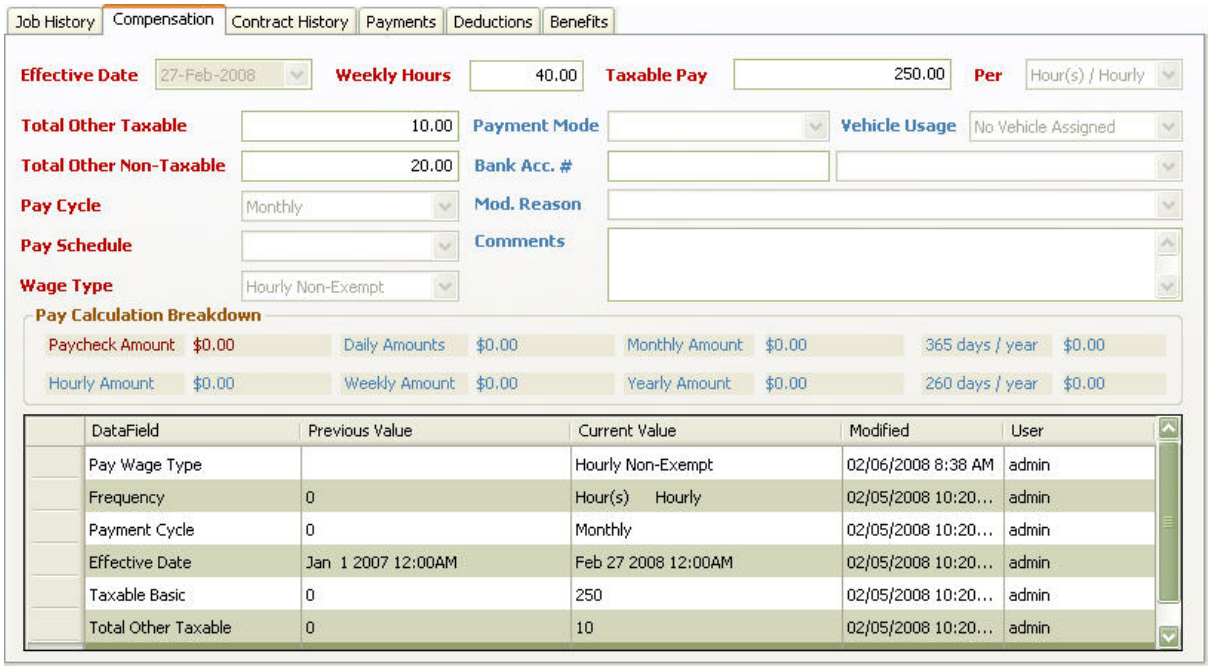


4.2.1.2.2 Compensation

This maintains the pay cycle, with weekly hours, the pay schedule, with taxable and non taxable deductions.

The effective date is the when the employee was first employed, or date of a salary increase. Taxable pay can be the gross salary for the year, monthly, weekly or hourly rate. Taxable Other refers to any allowances an employee may receive.

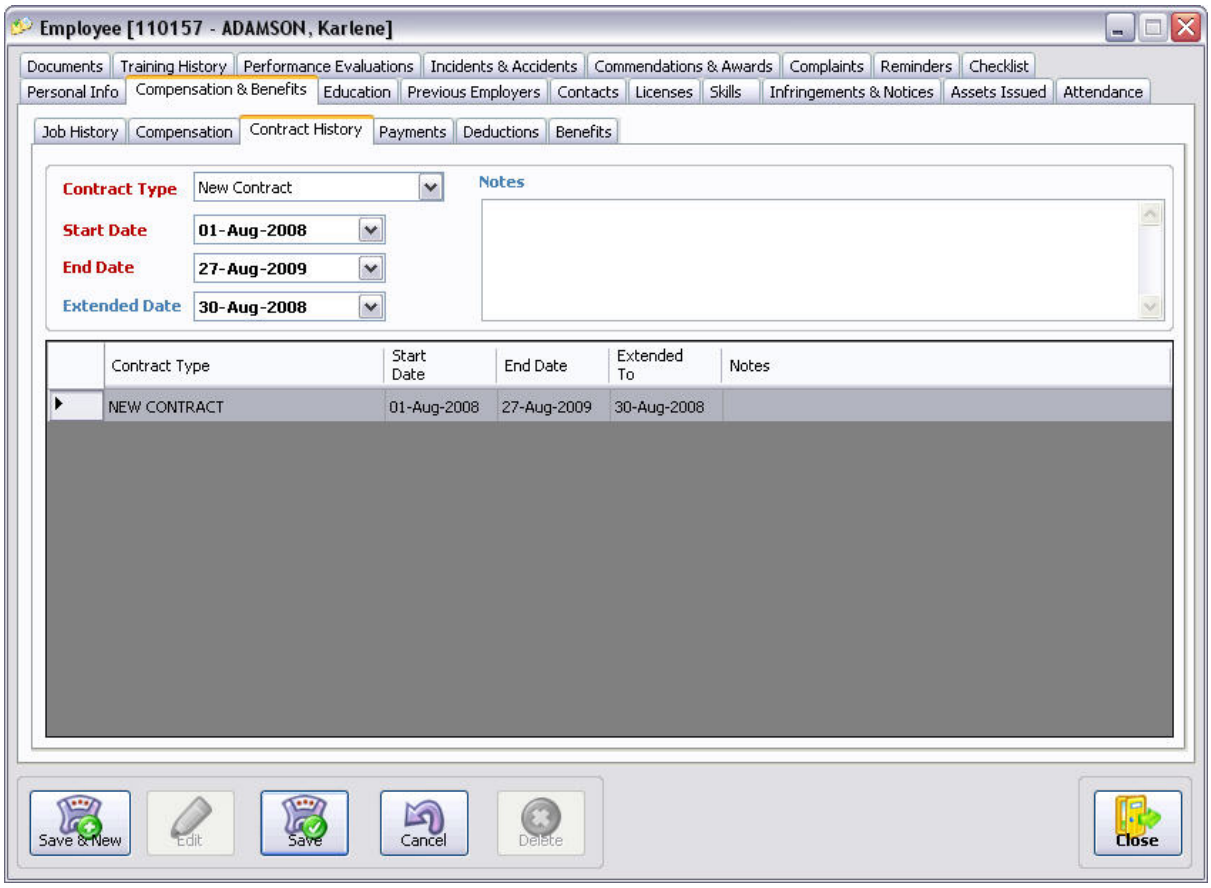
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.2.1.2.3 Contract History

This form allows for maintenance to the types of contracts issued to an employee and the associated dates. Contract Types and contact break periods are setup in the General menu under Maintenance.

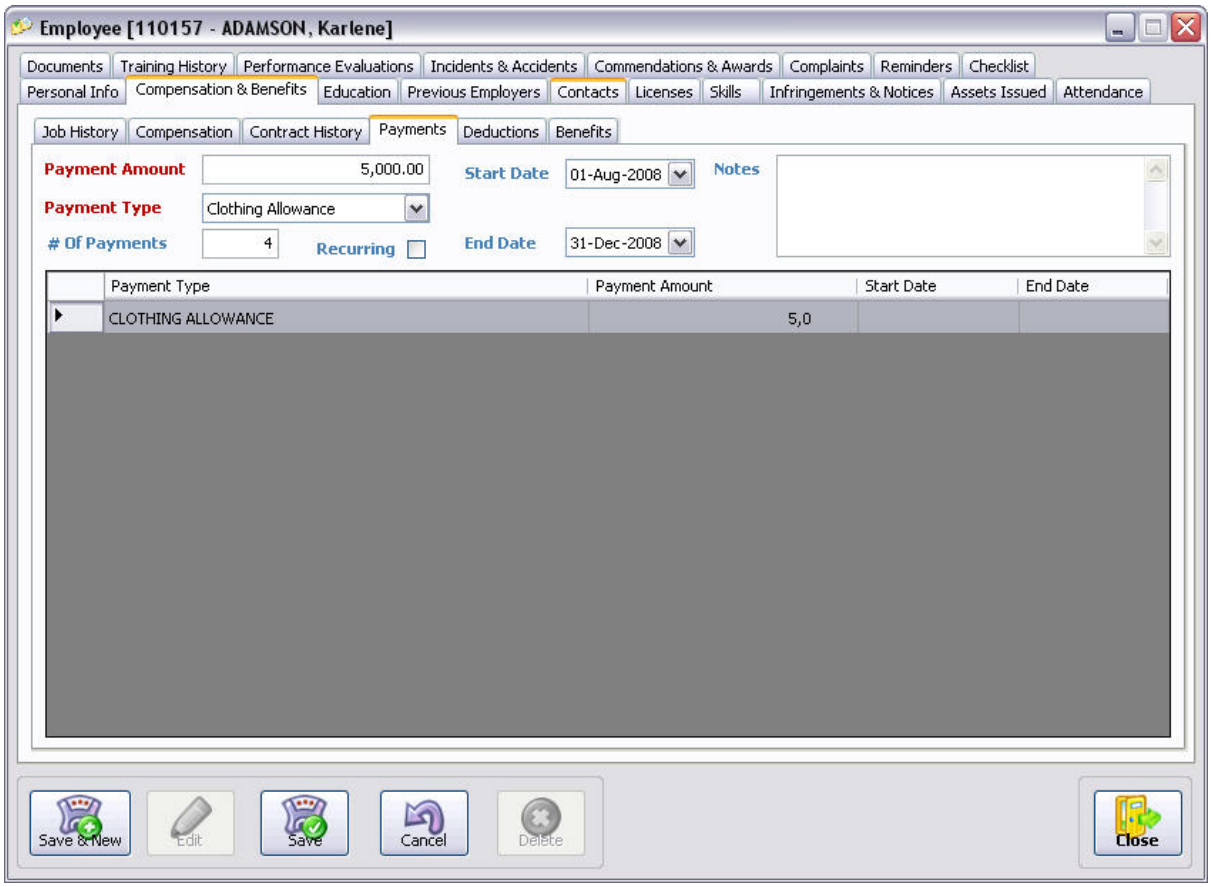
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.2.1.2.4 Payments

This form maintains the types of payments made to or on the behalf of employees and the amounts. An example of this would be a payment for uniform allowance, insurance payouts or bonus pay.

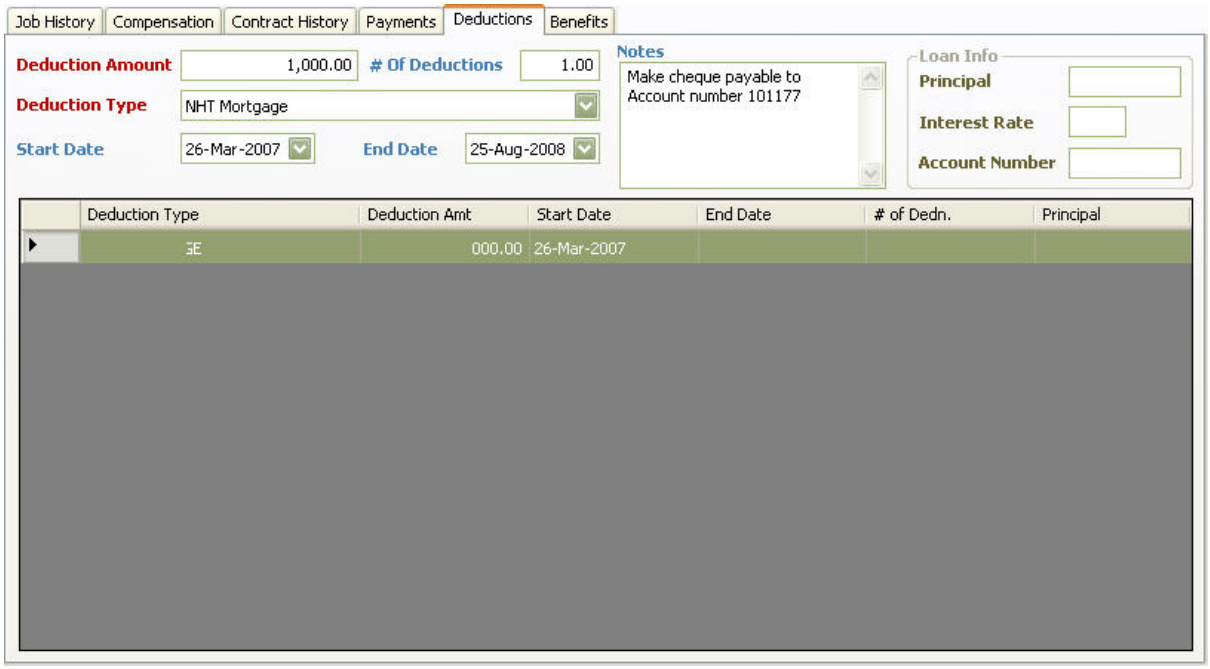
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.2.1.2.5 Deductions

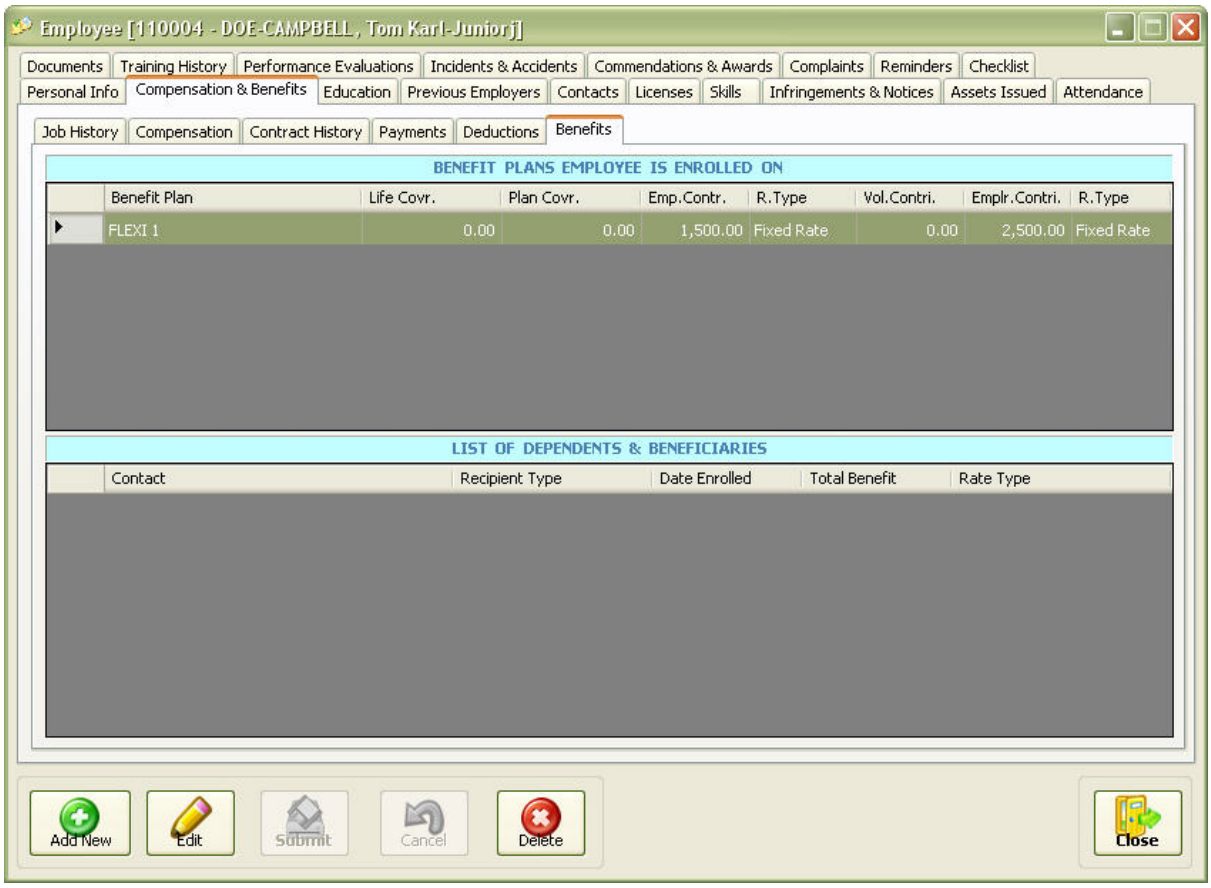
This form maintains a record of deductions per employee and the amounts. Deductions maybe for salary advances, staff loans, lunch payments etc.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.2.1.2.6 Benefits

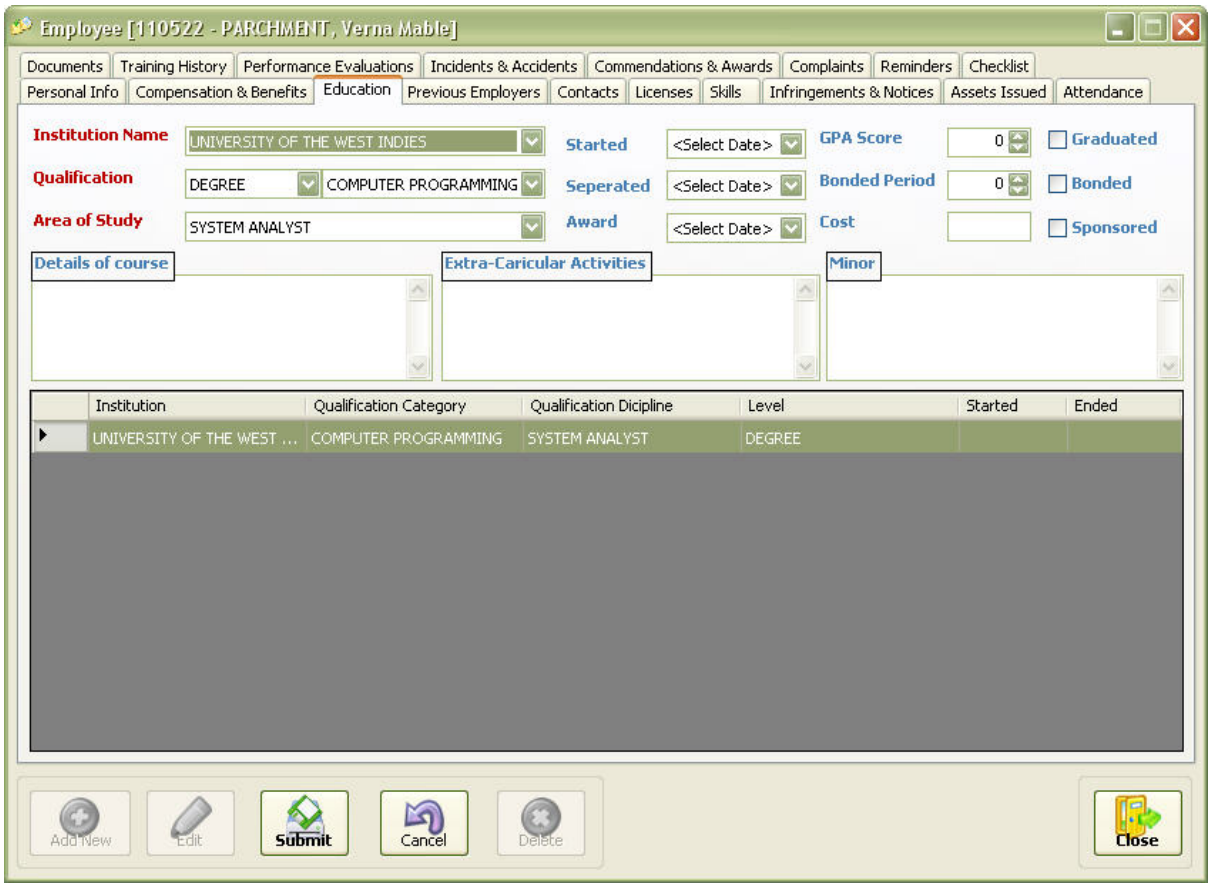
This form list the benefits currently issued to the employees. For example and benefit would be health insurance. The form maintains the contributions made and the length of time that an employee may be using the benefit. This information is from the Benefits module and is not directly entered in this area.



4.2.1.3 Education

This form maintains the level of education attained by the employee. Data submitted must include the name of the institution, qualification and area of study.

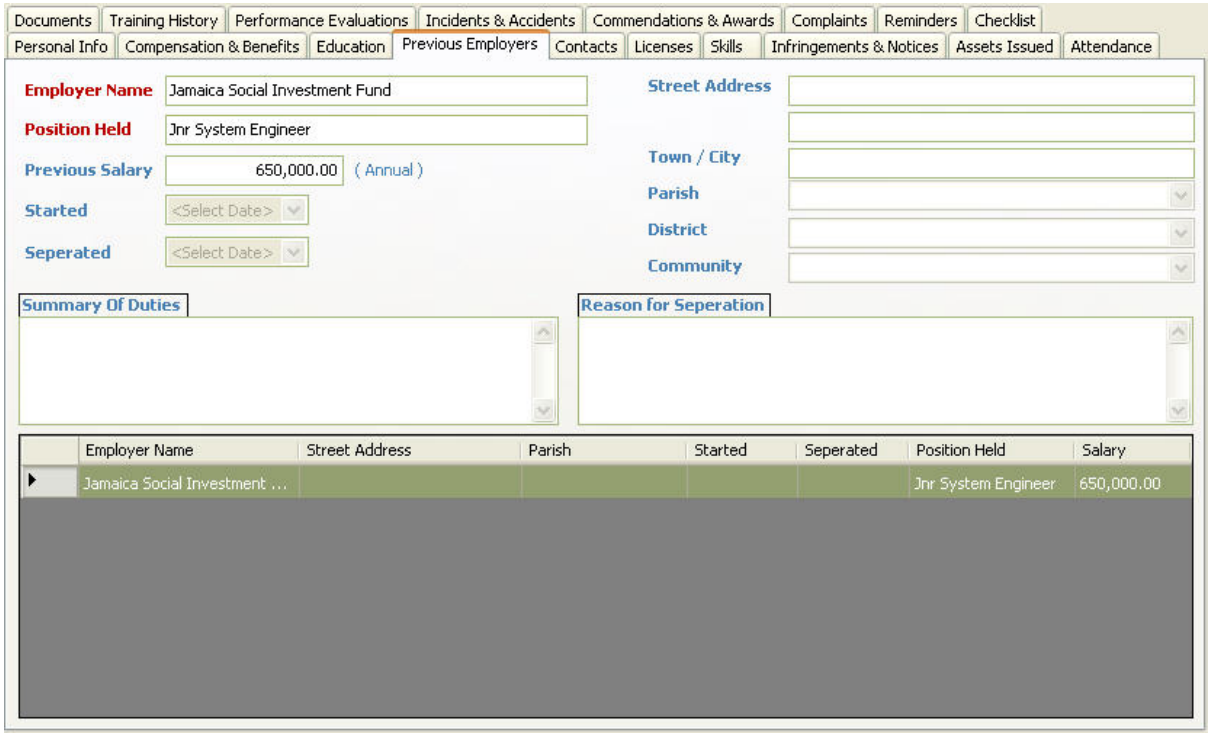
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.2.1.4 Previous Employers

This form maintains information on the previous employer. Data submitted on this form should include the employer's name and the position held while at the previous organization.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



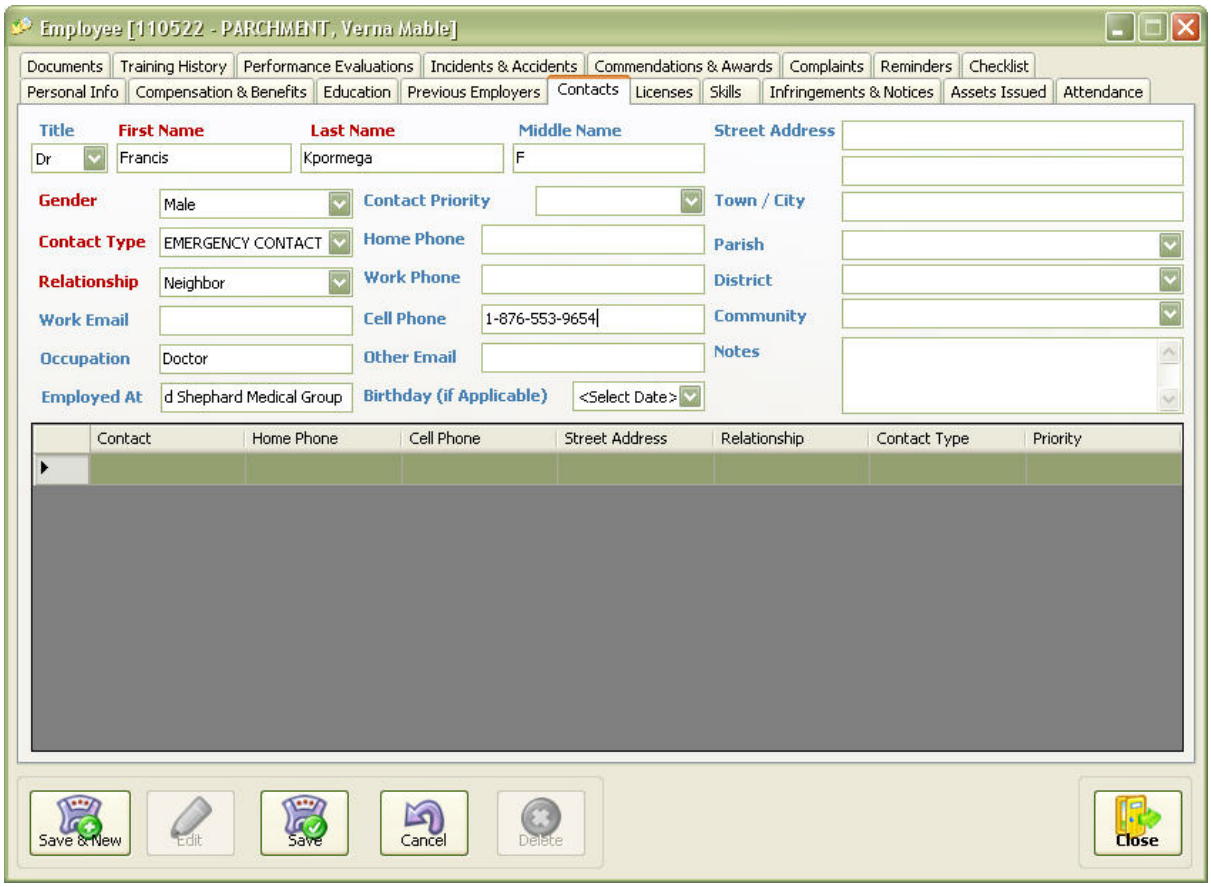
4.2.1.5 Contacts

This form allows for maintenance to the list of contacts for the employee. Data submitted must include name of the individual, gender, contact and relationship to the individual.

All contacts including emergency, next of kin, dependents and beneficiaries should be entered in this area by selecting the appropriate Contact Type.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

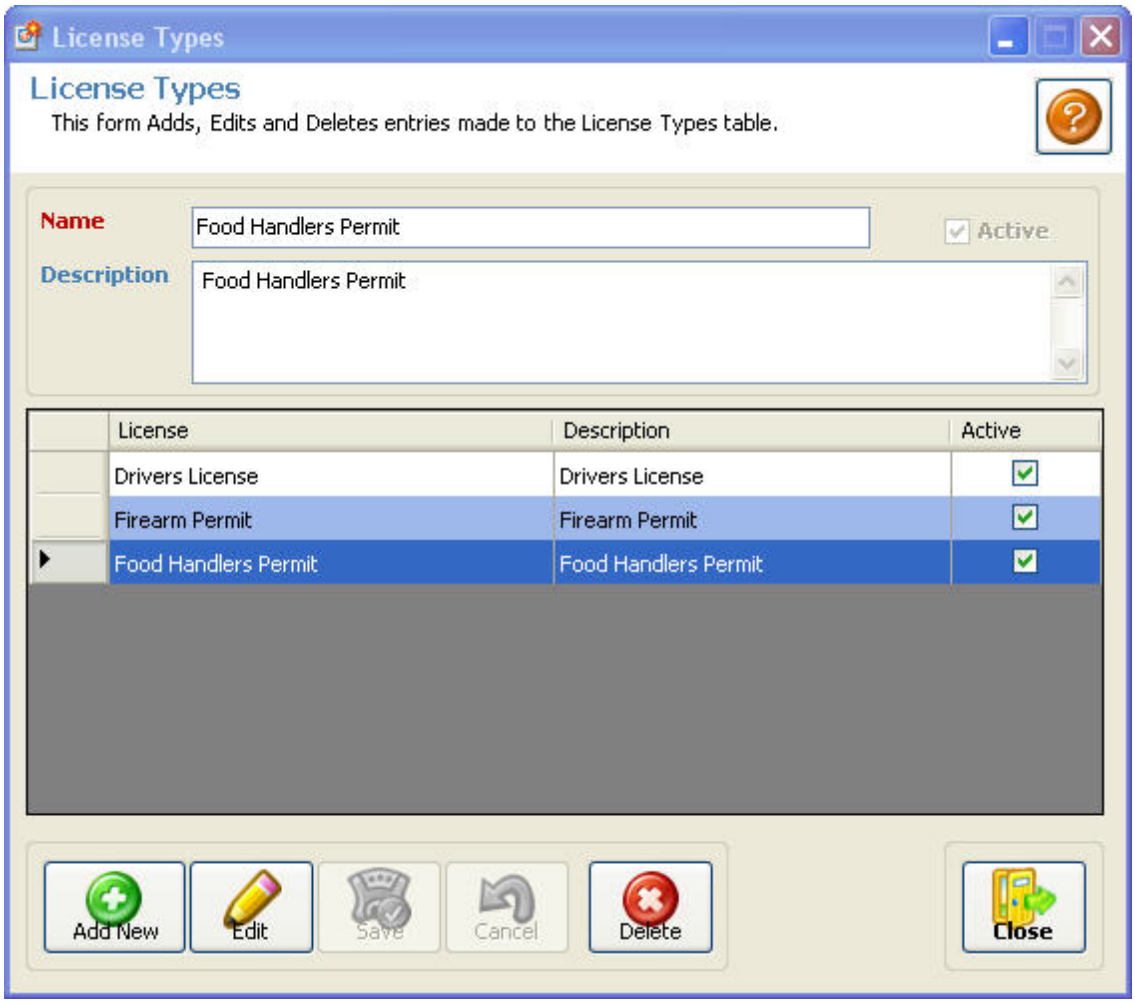
© 2014 Enter your company name



4.2.1.6 Licenses

This form maintains a list of licenses currently held by the employee. An example of this would be the driver's license, food handler's permit, vehicle registration documents etc.

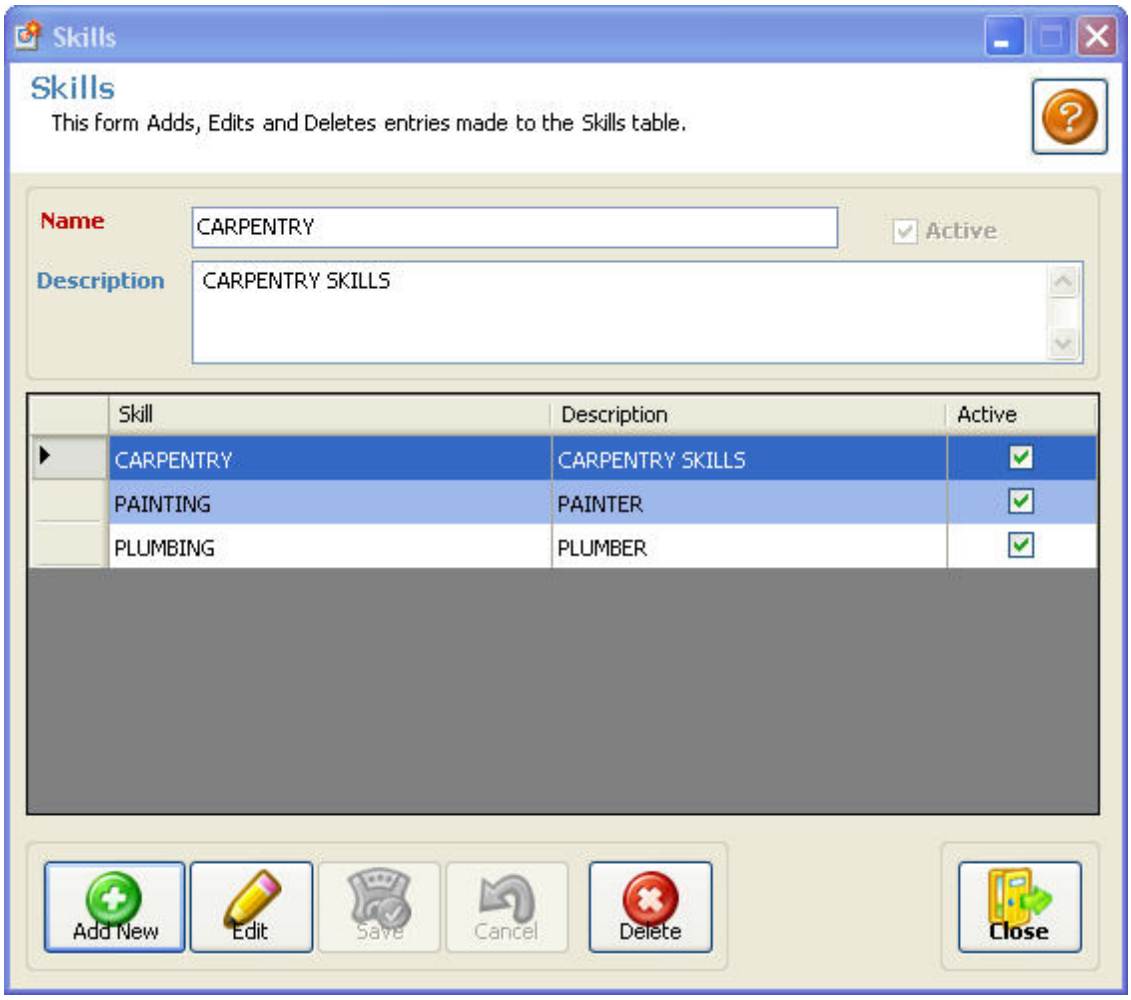
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.2.1.7 Skills

This form maintains the list of skills an employee may have. The form allows for submission of more than one skill type. For example, carpentry or typing.

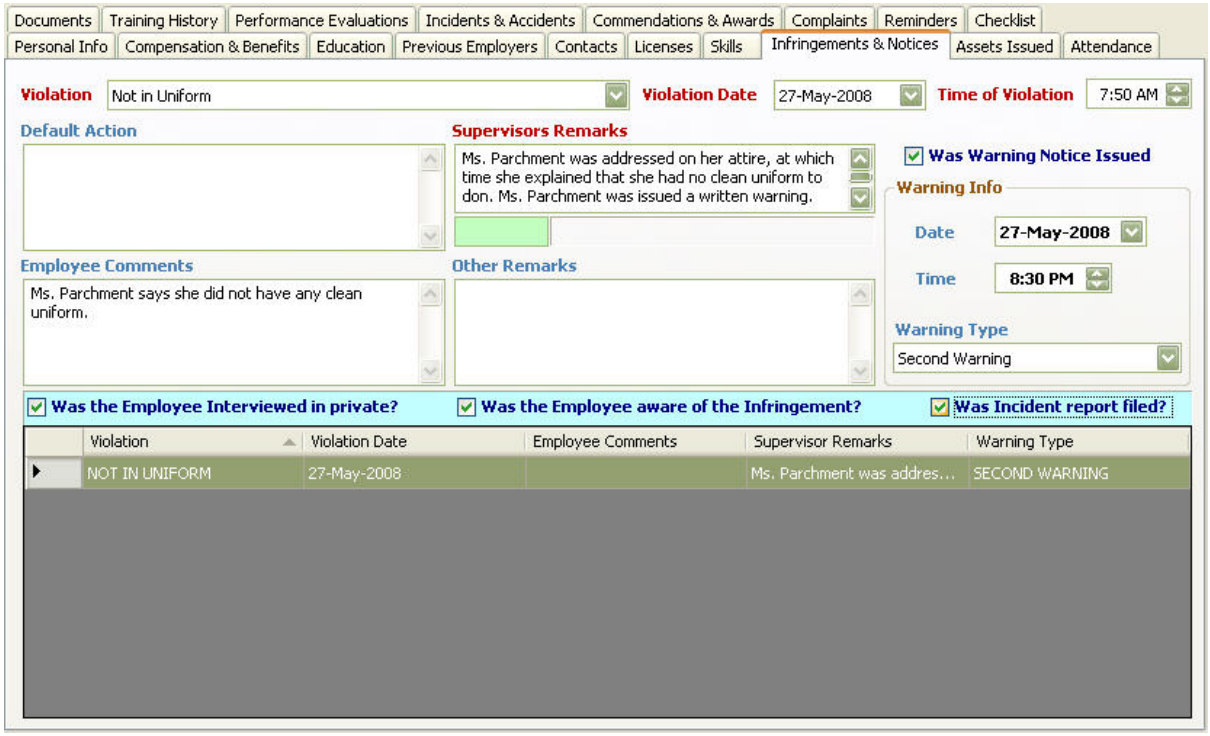
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.2.1.8 Infringements & Notices

This form maintains the infringements committed by an employee and the notifications issued to same. Data submitted must include: supervisors remarks, violation date and time.

© 2014 Enter your company name



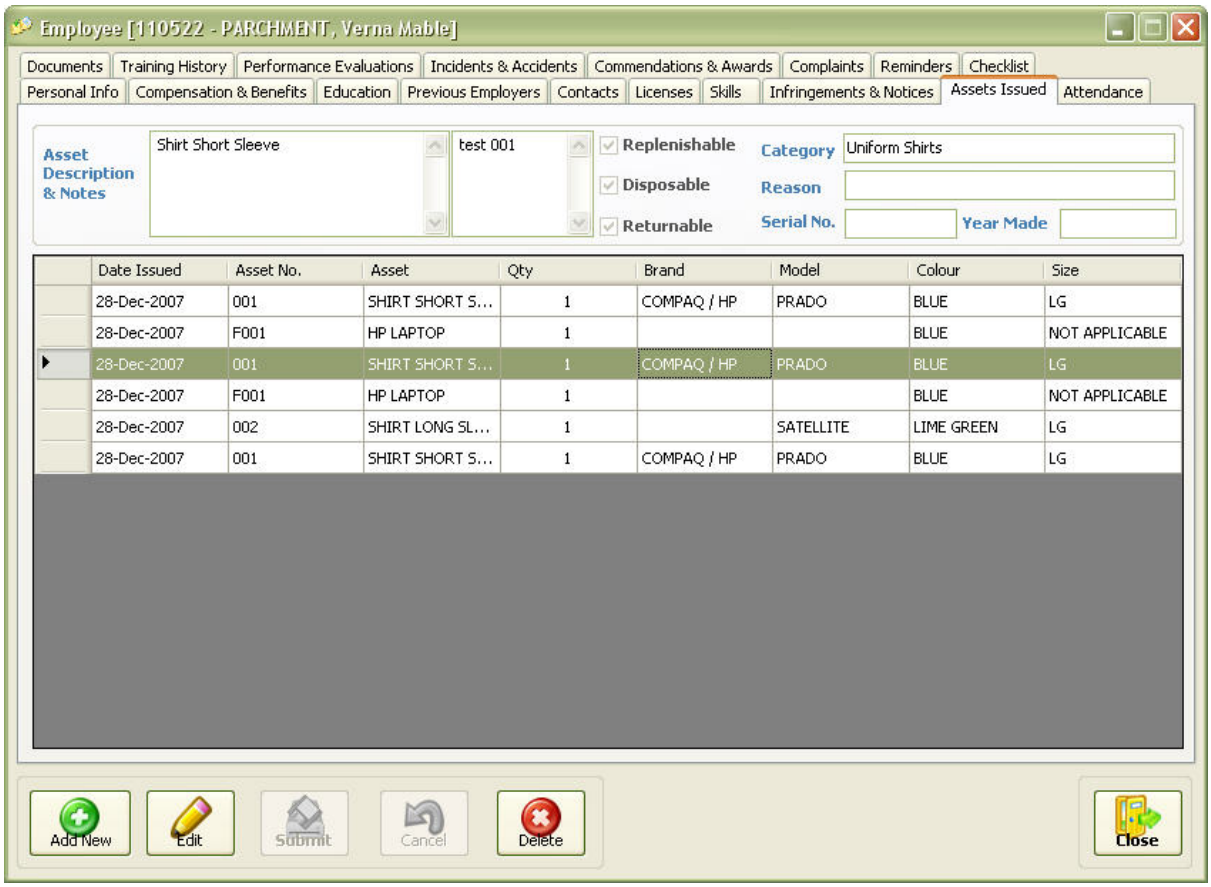
See Add Edit and Delete to learn how to enter information in this screen

Remember to Save Cancel or Close when done!!

4.2.1.9 Assets Issued

This form maintains the list of assets issued to an employee. The form allows for a wide range of assets from uniform to office equipment.

© 2014 Enter your company name



See Add Edit and Delete to learn how to enter information in this screen

Remember to Save Cancel or Close when done!!

4.2.1.10 Attendance

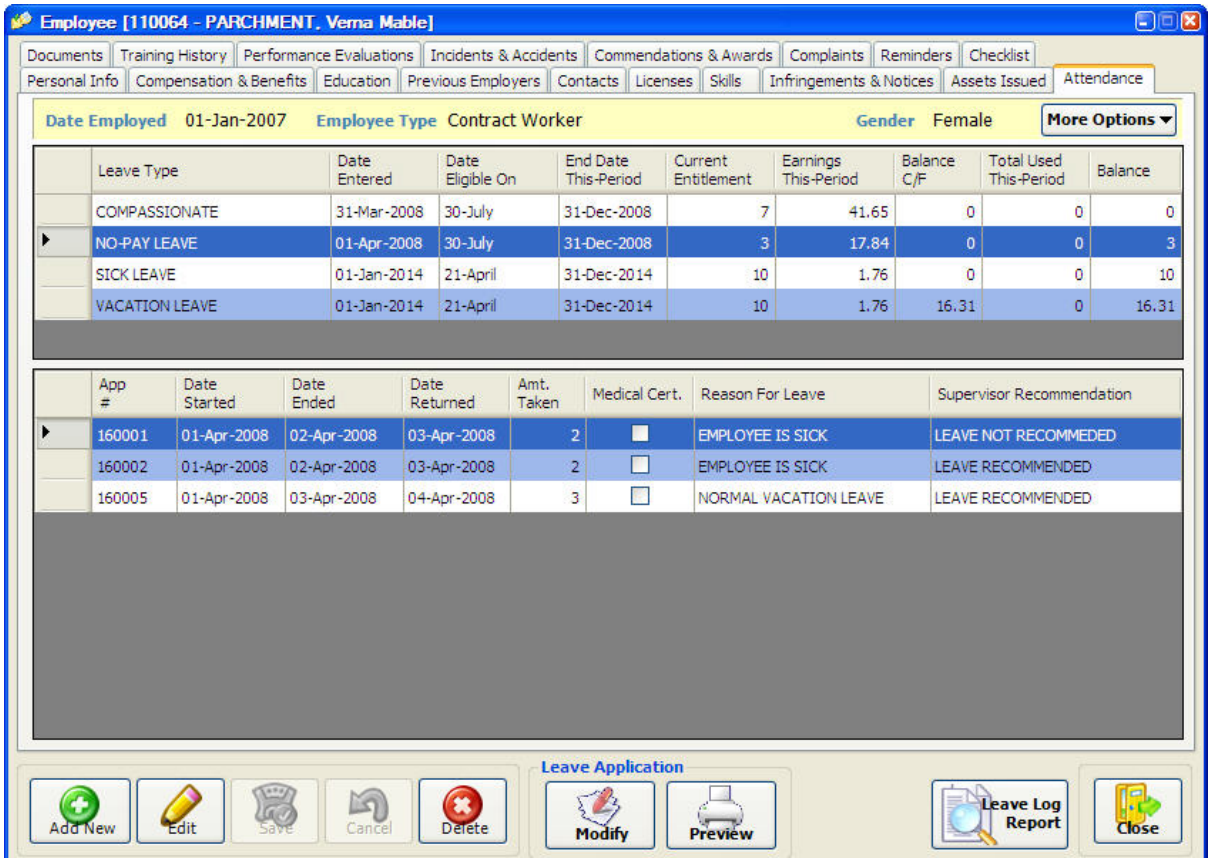
The Attendance tab list all leave types assigned to an employee and associated balances.

Leave Type: Name of absent type such as sick or vacation
Date Issued: This is the date the C/F balance was first entered or the date of the last anniversary renewal
Date Eligible: The initial date from the date of employment which qualifies the employee for the assigned leave type
End Date: The expiration date of current period. This maybe Dec 31 or one day before the employee anniversary date
Current Entitlement: The current number of days the employee is entitled to based on their years of service
Earnings: Pro-rated balance from the date of issue to current day/date
Balance C/F: Number of days assigned at Leave Stock or unused days brought forward from the last period

© 2014 Enter your company name

Total Used: Total days taken between **Date Entered** and **End Date This-Period**

Balance: Available balance to be taken by employee



MORE OPTIONS

Recalculate Selected Leave

This function updates the total used and balance information for the selected leave type

Recalculate All Leave Types

This function updates the total used and balance information for the all leave types assigned to the employee

Reset Selected Leave Type

This function resets leave data to the employment date of the employee and recalculate all balances for all years to date

Transfer Leave Application

This function is used to move a Leave Application from one Leave type to another

© 2014 Enter your company name

if it was entered in error

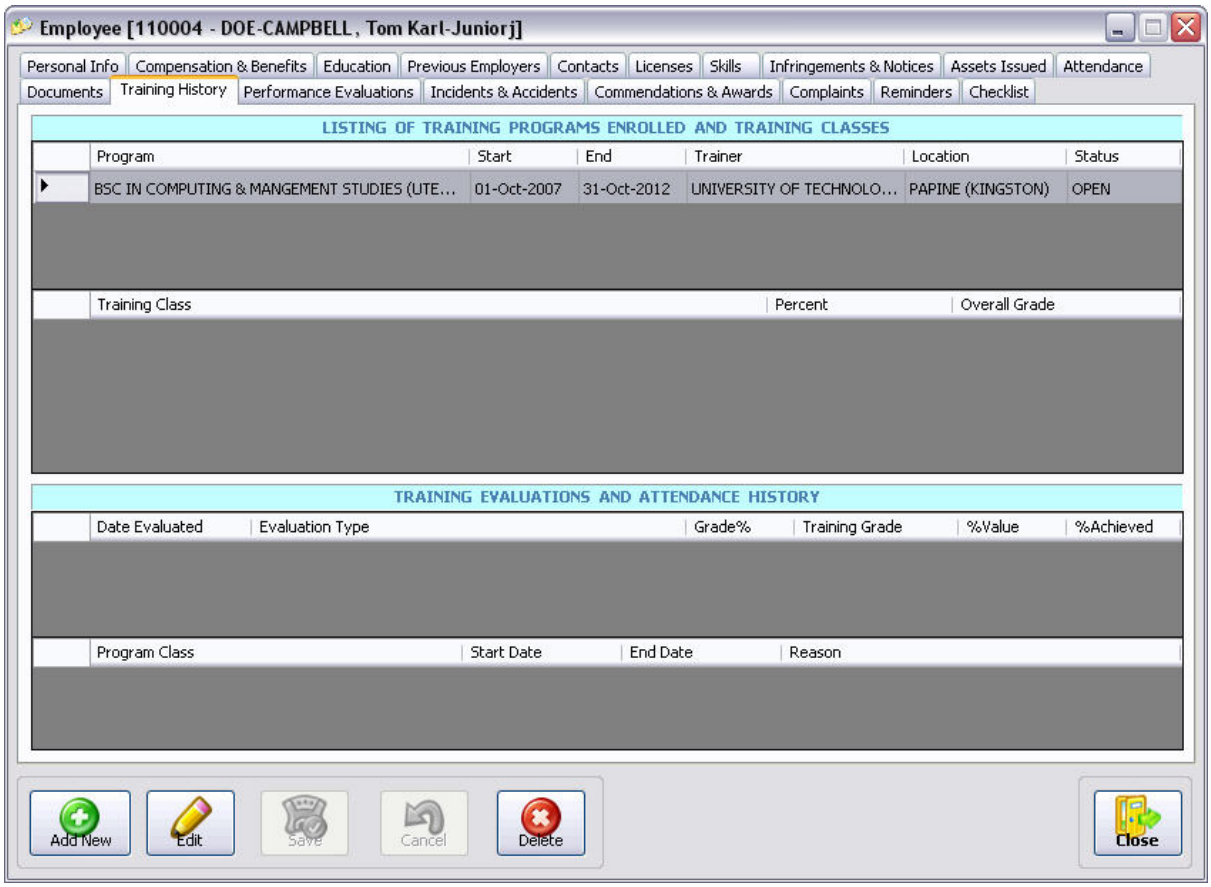
Set Leave Stop Date

This function sets a Stop date so balances are no longer updated. This applies where an employee maybe promoted from one

one Leave type to another with a larger entitlement.

4.2.1.11 Training History

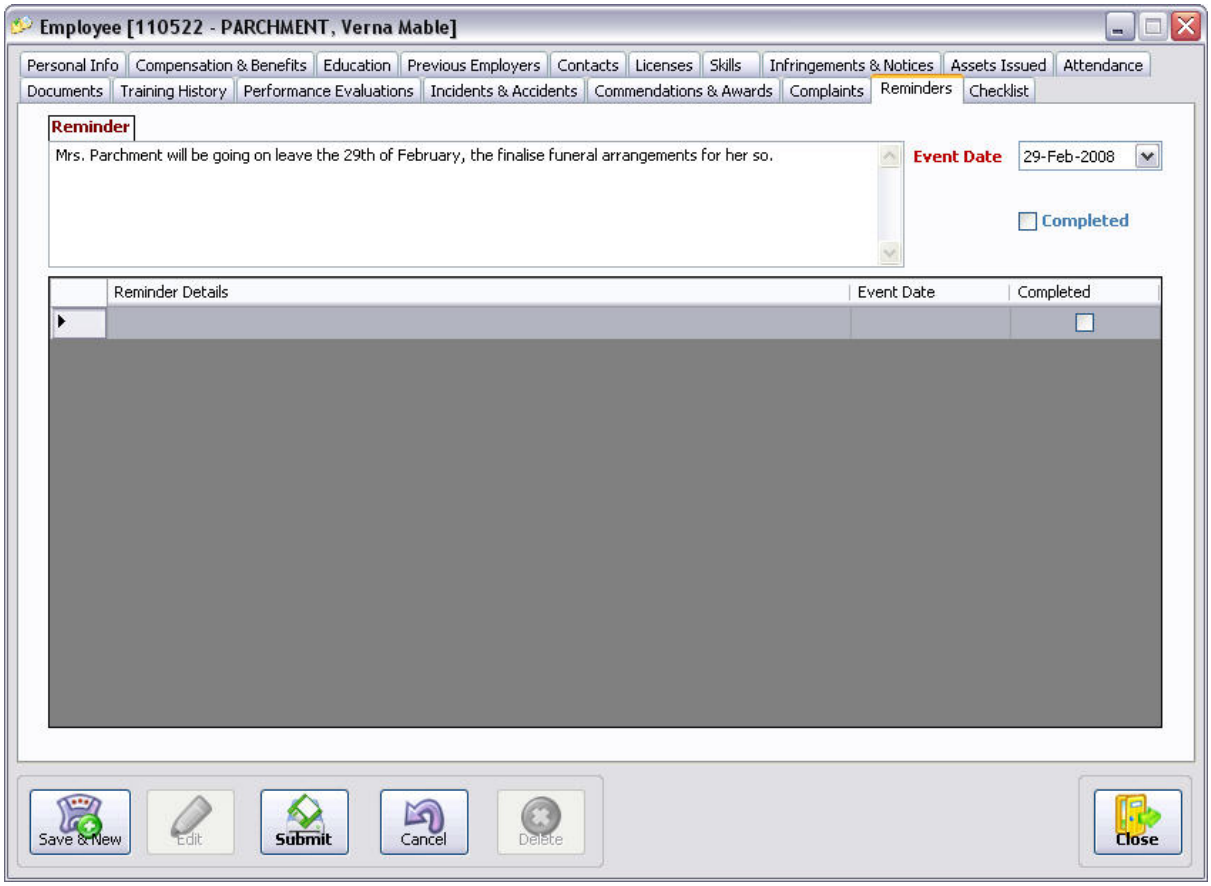
This form maintains the history of training programs attended and completed by staff. The form keeps a record of dates attended and grades achieved within that program. Also if the employee was enrolled for training and did not attend,any record of absence will also show in this list.



4.2.1.12 Reminders

This form maintains any reminders associated with the applicant. For example, the user may set aside a date to call an applicant for a second interview.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



See Add Edit and Delete to learn how to enter information in this screen

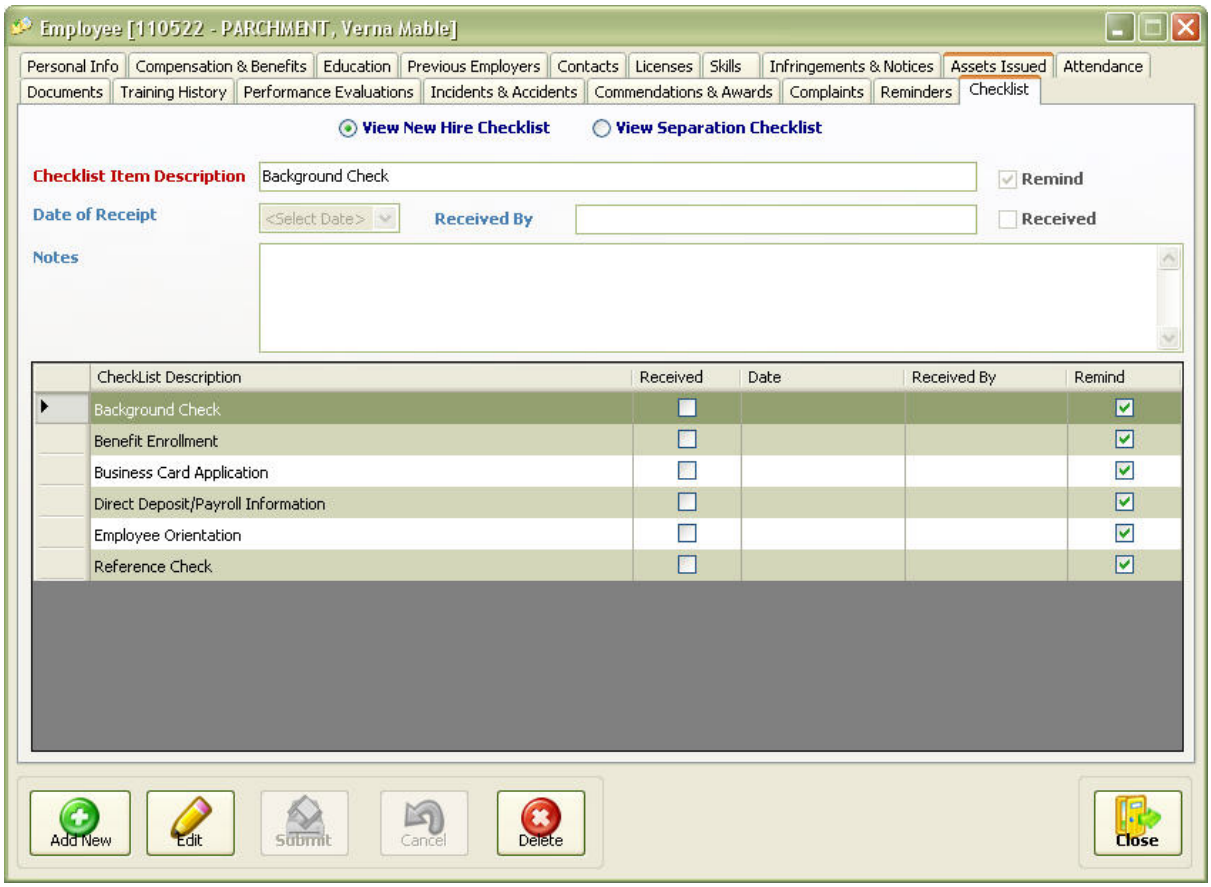
Remember to Save Cancel or Close when done!!

4.2.1.13 Checklist

This form allows for maintenance to the list of necessary checks or tasks relating to an employee. For example a new employee would need to submit to the institution a list of documents. The checklist form allows the HR personnel to list all the documents required and also to check/select the items as they are being turned in.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

© 2014 Enter your company name



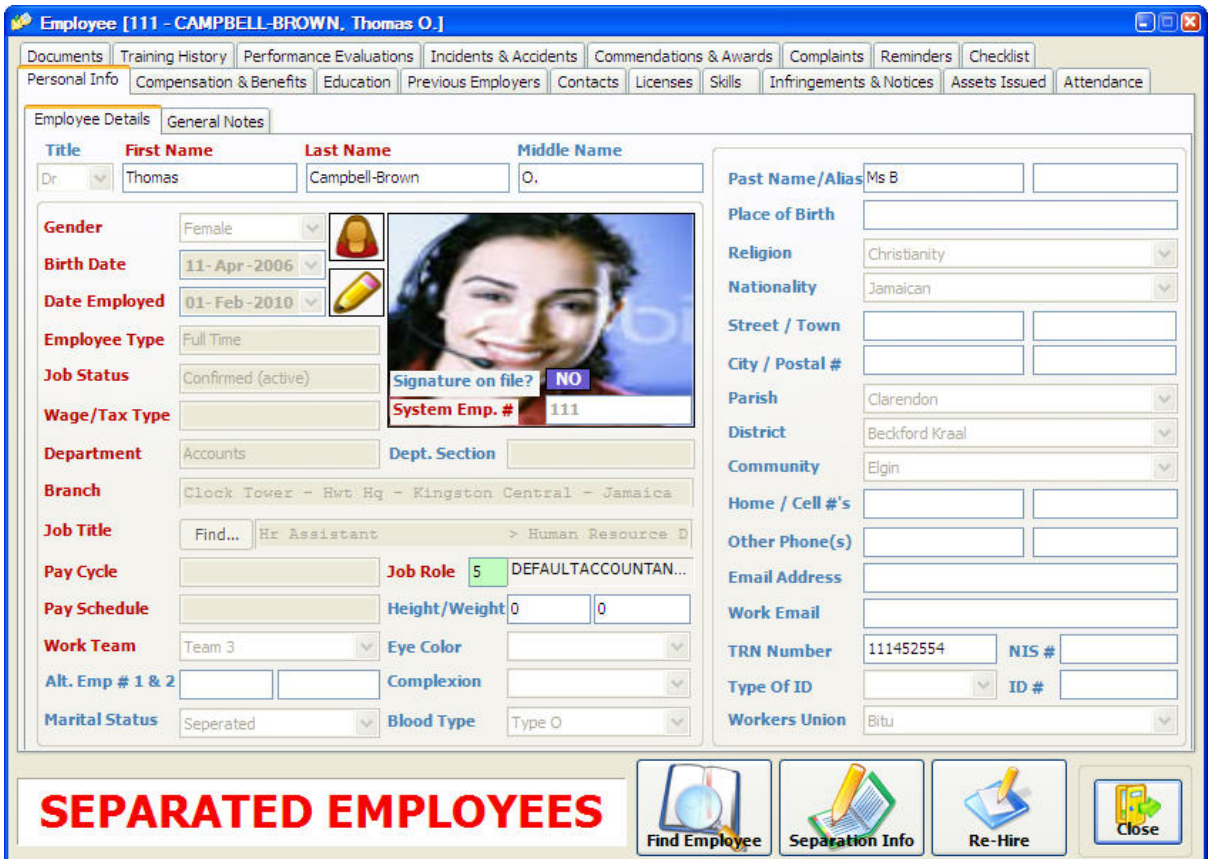
See Add Edit and Delete to learn how to enter information in this screen

Remember to Save Cancel or Close when done!!

4.2.2 Separated Employees (Inactive)

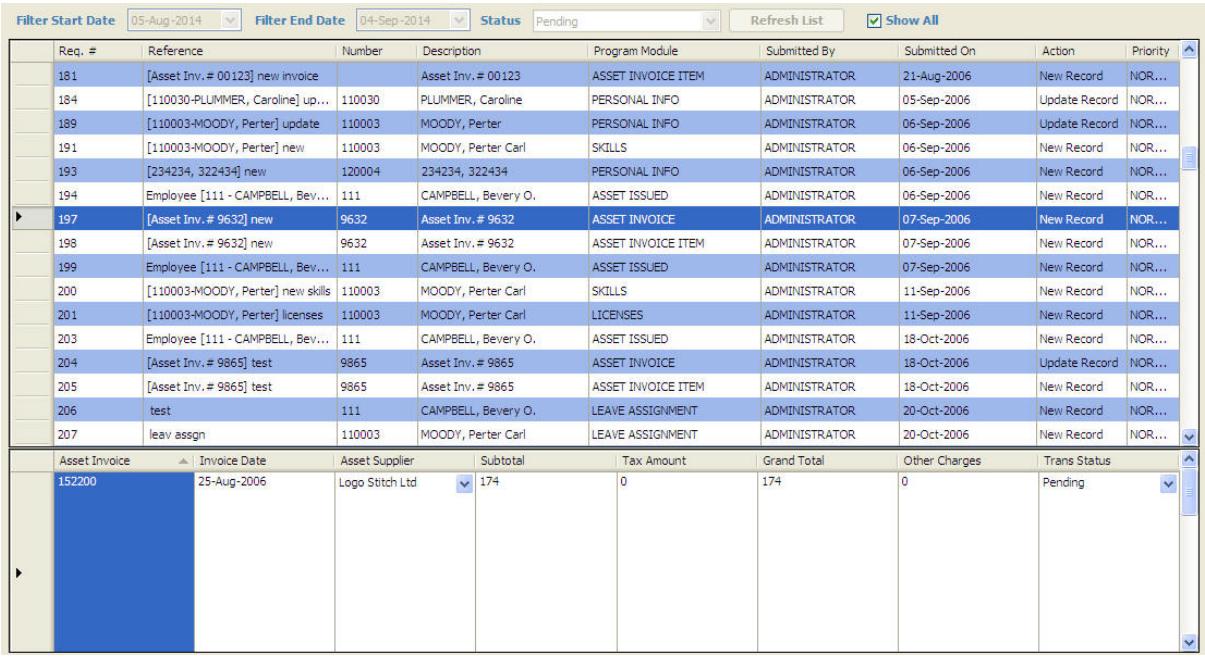
It is always important to have information about past employees. This form gives access to the separated employees, crucial data can be retrieved here, such as salary, last working date and the reason and details of the employee's separation.

© 2014 Enter your company name



4.2.3 My Submitted Work Flows

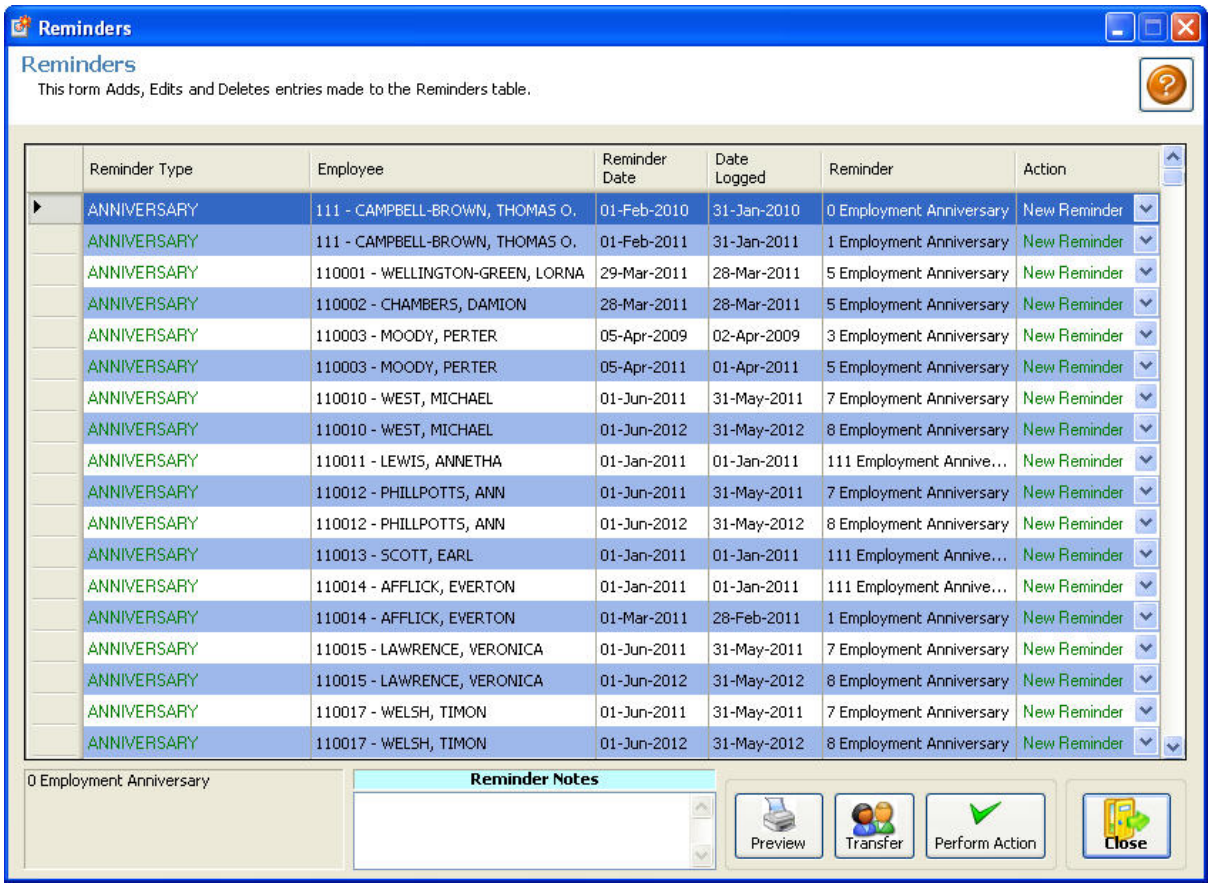
When the transactional module is turned on, record changes have to be submitted for approval. My Submitted Work Flows option is available to all users so they can see items pending approval or previously approved by an administrator.



4.2.4 My Reminders

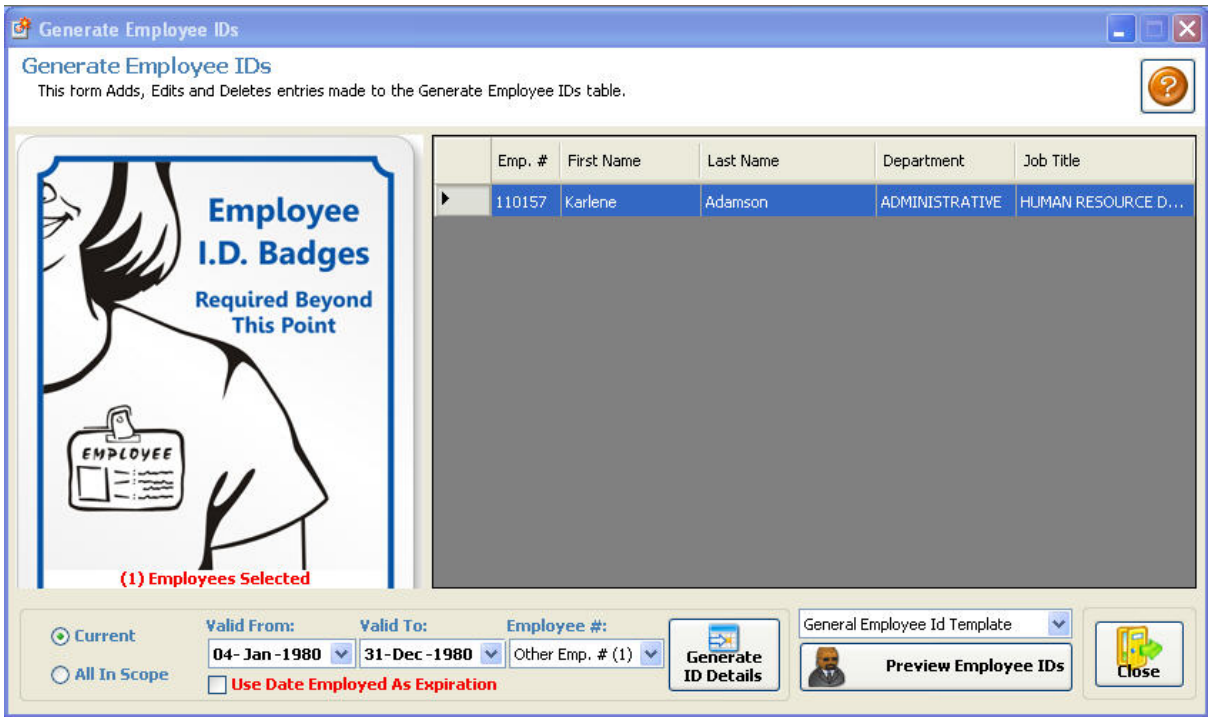
The system has over twelve types of reminders. The reminder form is an effective way of displaying important dates such as employee birthday's, the expiration of assets among others.

Reminders can be flagged as completed by changing the Action or reminders can be transferred to another user for Action.



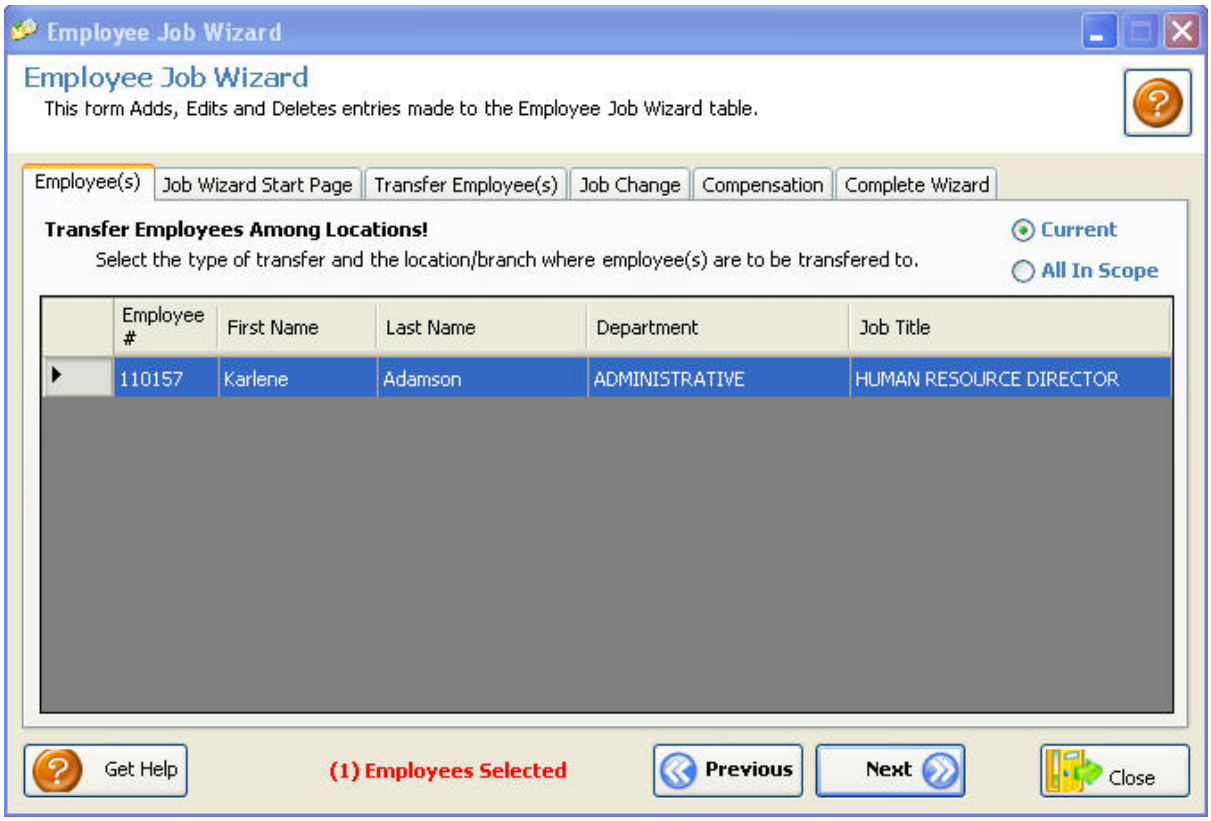
4.2.5 Print Employee IDs

SMART Staff Manager allows the printing of laminated employee identification cards. Before you can use the feature your ID Template has to be designed and added to the system using Crystal Reports.



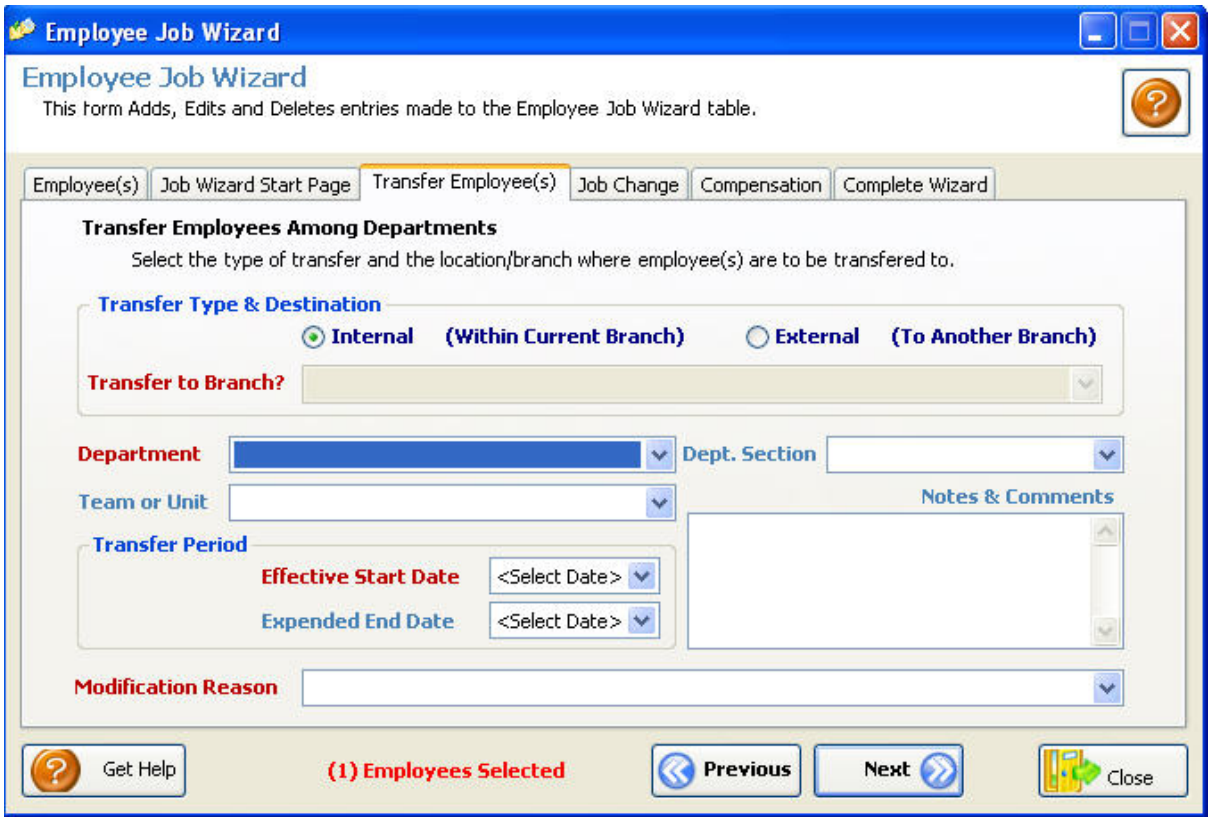
4.2.6 Employee Job Wizard

The Employee Job Wizard is a batch utility that allows you to rehire a separated employee or do a mass update for active employees such as a salary increase.



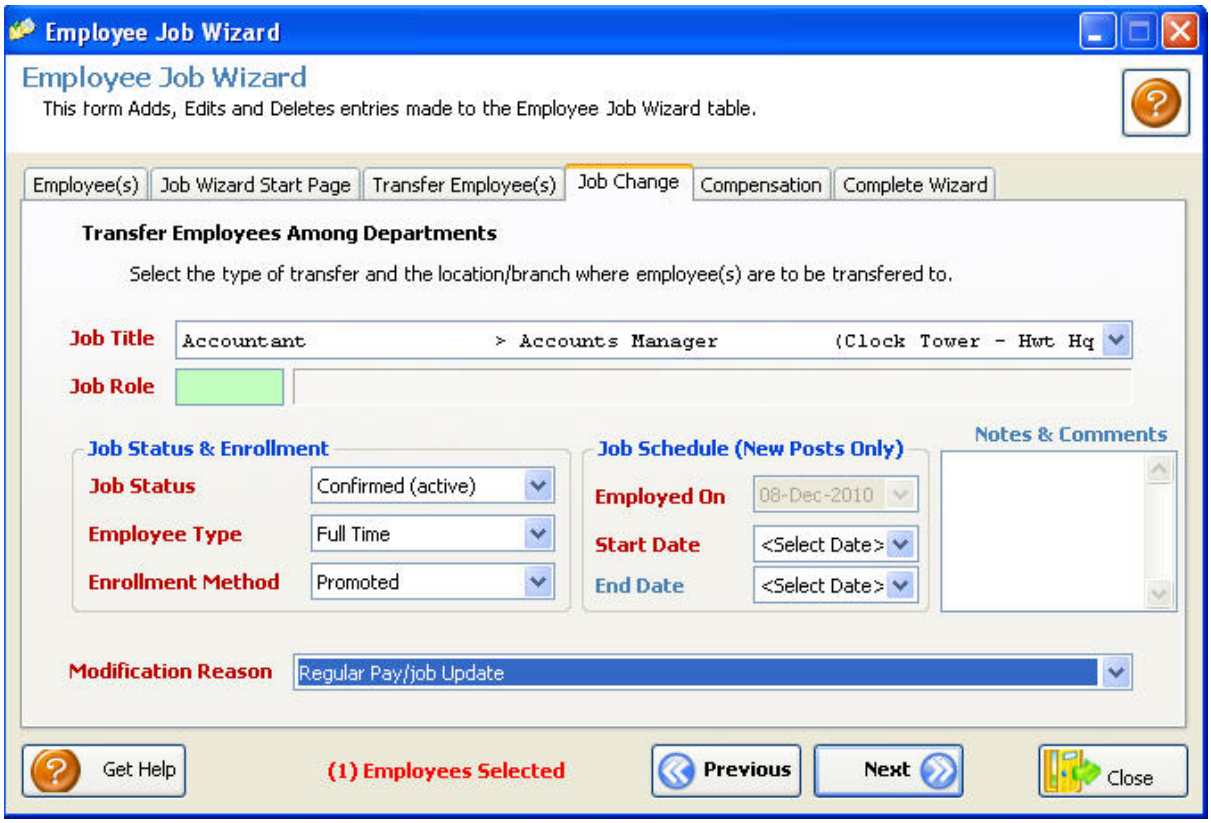
4.2.6.1 Branch/Department Transfers

Updating employee records by changing department and branch is considered a transfer. Set transfer details and effective dates to continue.



4.2.6.2 Job Change/Update

Employee promotions or demotions and other job status information is set on this tab. Update mandatory details to continue.

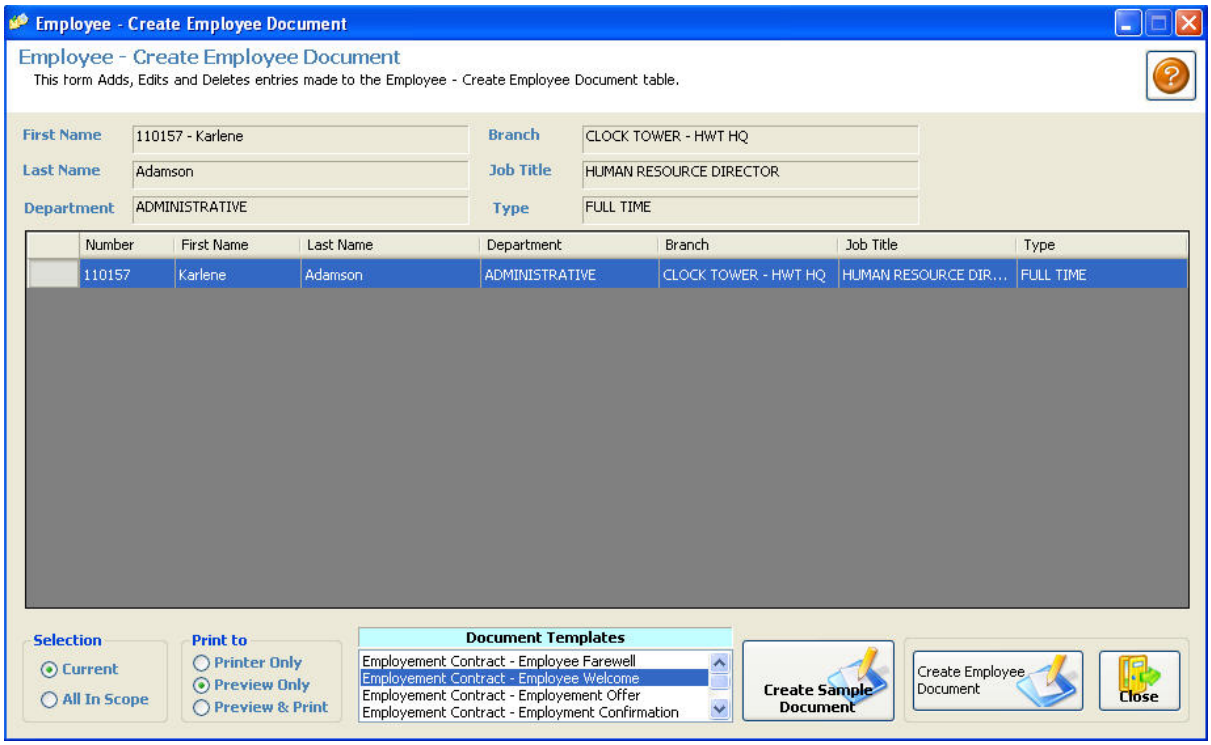


4.2.6.3 Compensation Update

The Compensation tab has all salary related information for the employee. Update mandatory details to continue.

4.2.7 Create Employee Document

Employee document such as job letters and contracts can be auto generated using Microsoft Word mail merge feature. Before you can use this feature, the document templates have to be added to the system using the document module. You are also able to attached scanned images and PDF documents directly to the employee's record.



4.2.8 Separation or Archive

Employees can be made inactive by using this function. You may Archive an employee record or do a full separation from the company.

<u>ARCHIVE ONLY</u>

Archiving an employee record makes it inactive without the need to enter separation details. To archive please do:

1. Find the employee using the Browse feature
2. Click the Process Separation button
3. Select **Archive Only** then press Save or Submit (if in Transactional Mode)

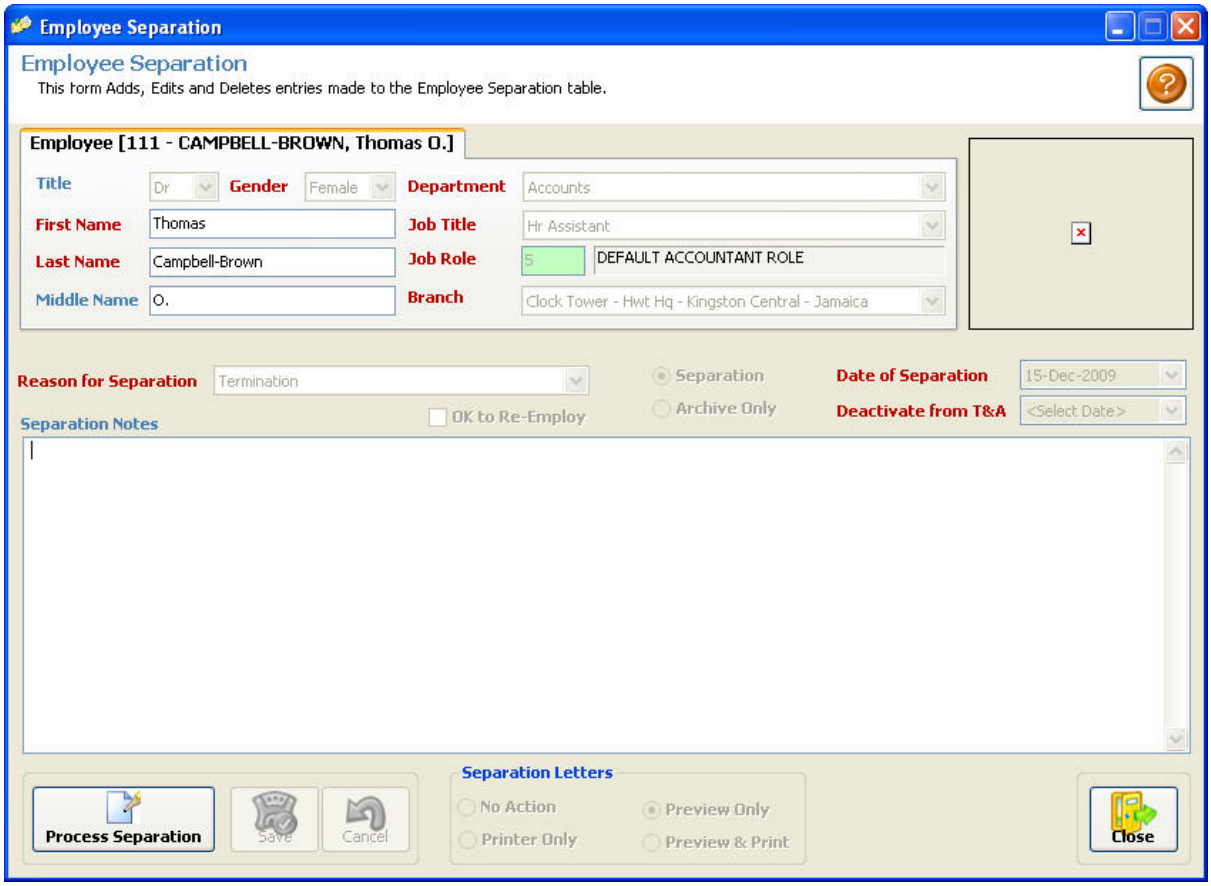
<u>FULL SEPARATION</u>

Doing a full separation will require the reason and date of separation to complete. To do this please do:

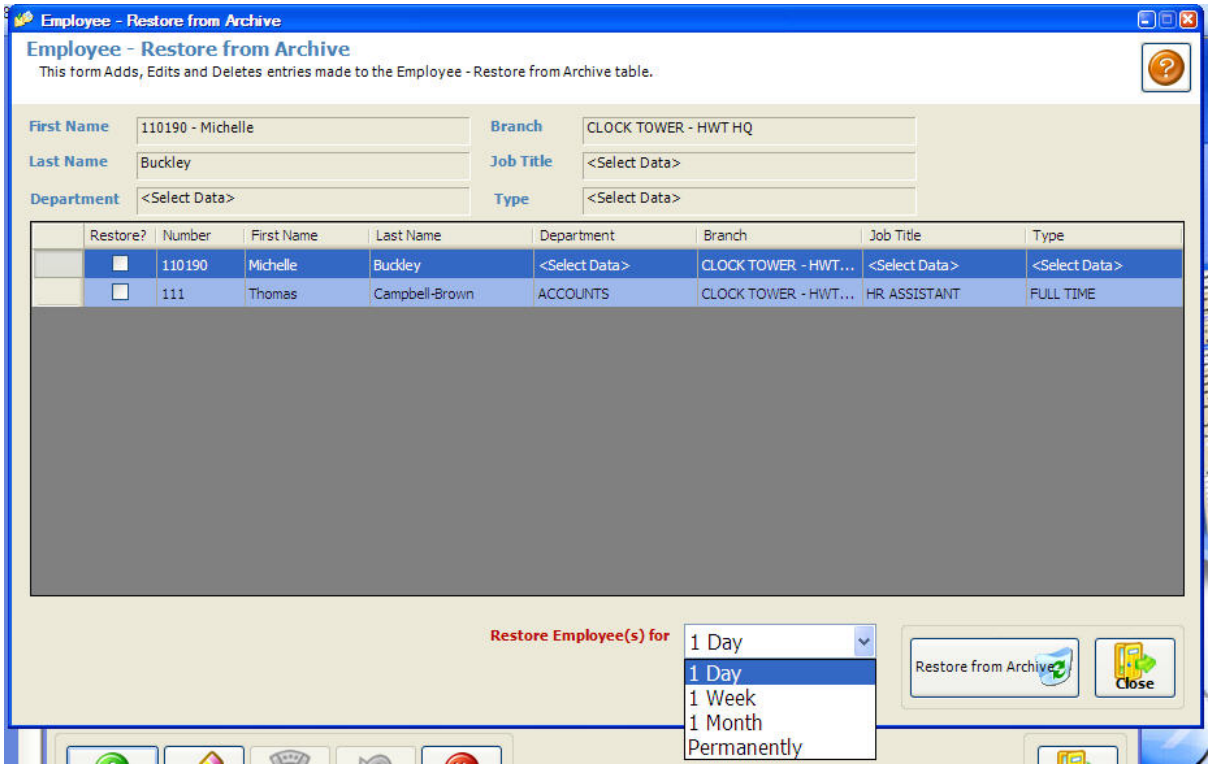
1. Find the employee using the Browse feature
2. Click the Process Separation button
3. Select the Separation Reason and Date of Separation. **Note:** The Deactivate from T&A option is set to 7 days after the separation date by default. When this date arrives the employee will be removed from the Time Clock software. Usually this date should be

manually set for a date after the next payroll so the employee may get their final pay.

4. Select **Archive Only** then press Save or Submit (if in Transactional Mode)



4.2.9 Restore from Archive



4.3 Transactions

Related Topics:

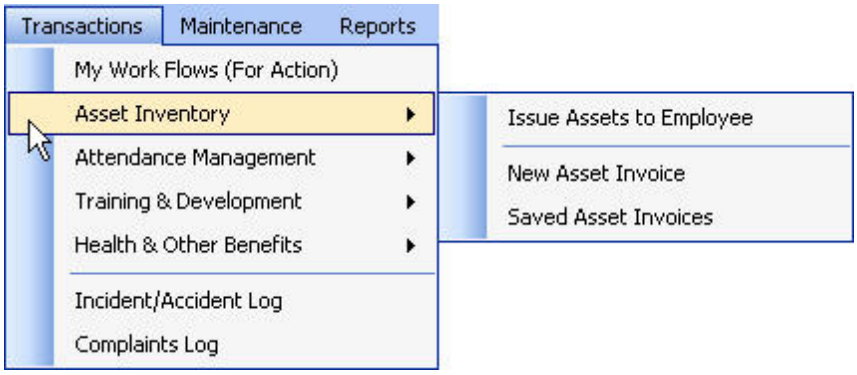
My Work Flows
Asset Inventory
Attendance Management
Training and Development
Health and other Benefits
Incident/Accident Log

© 2014 Enter your company name

Complaint Log

4.3.1 Asset Inventory

This form maintains the company's asset inventory.



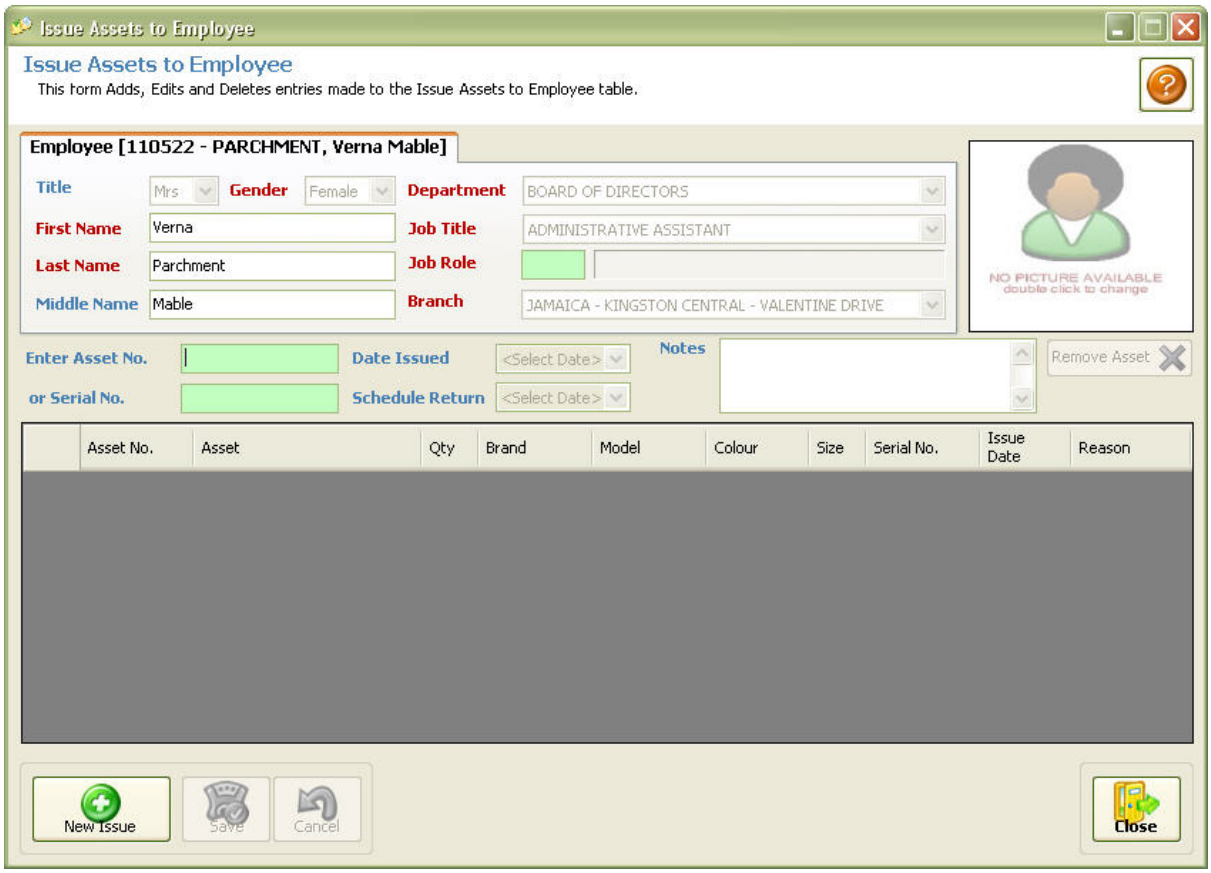
Related Topics

Issue Assets to Employee
New Asset Invoice
Saved Asset Invoices

4.3.1.1 Issue Assets to Employee

This form allows the user to maintain a record of the assets issued to each employee. Data submitted on this form should include the gender, department, name and job title for the employee.

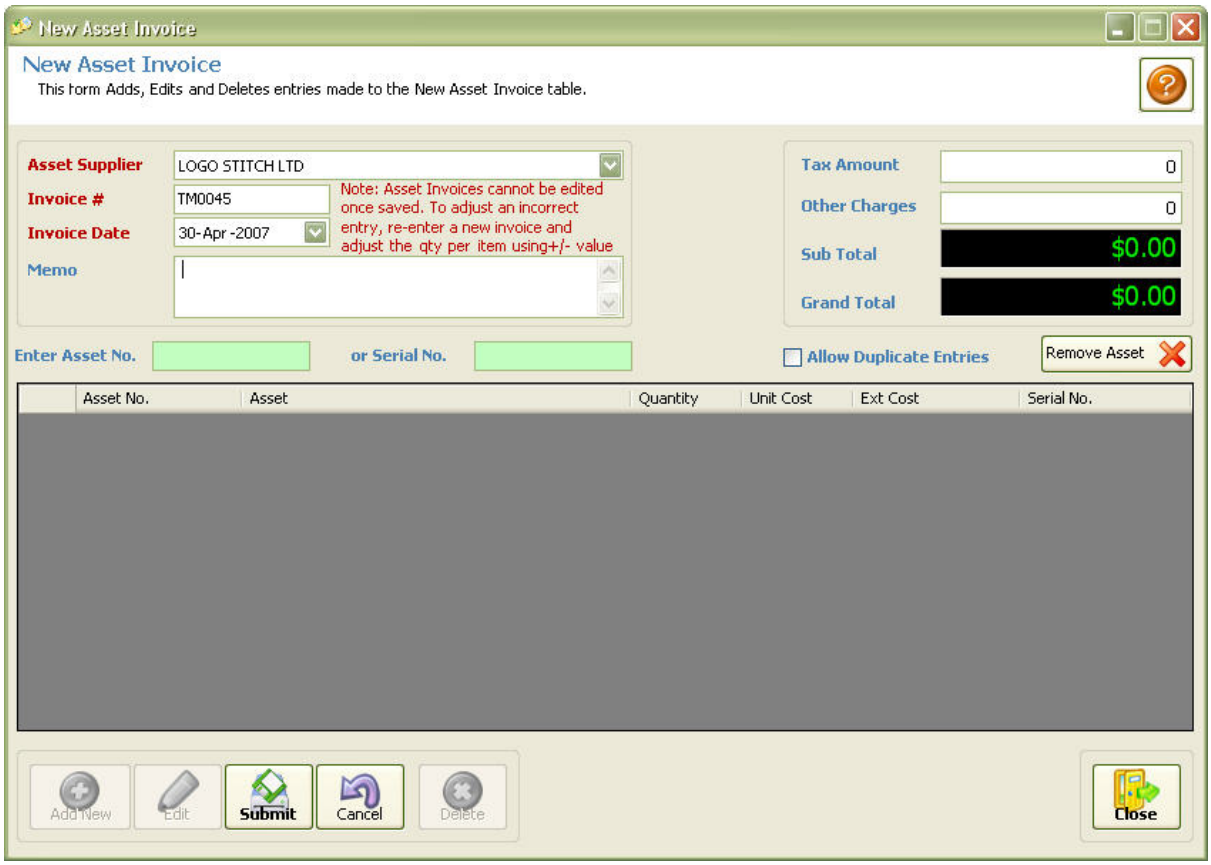
© 2014 Enter your company name



4.3.1.2 New Asset Invoice

This form maintains the name of the asset supplier, the invoice number and the date the invoice was generated. When assets are received the quantities are added to the inventory balances.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

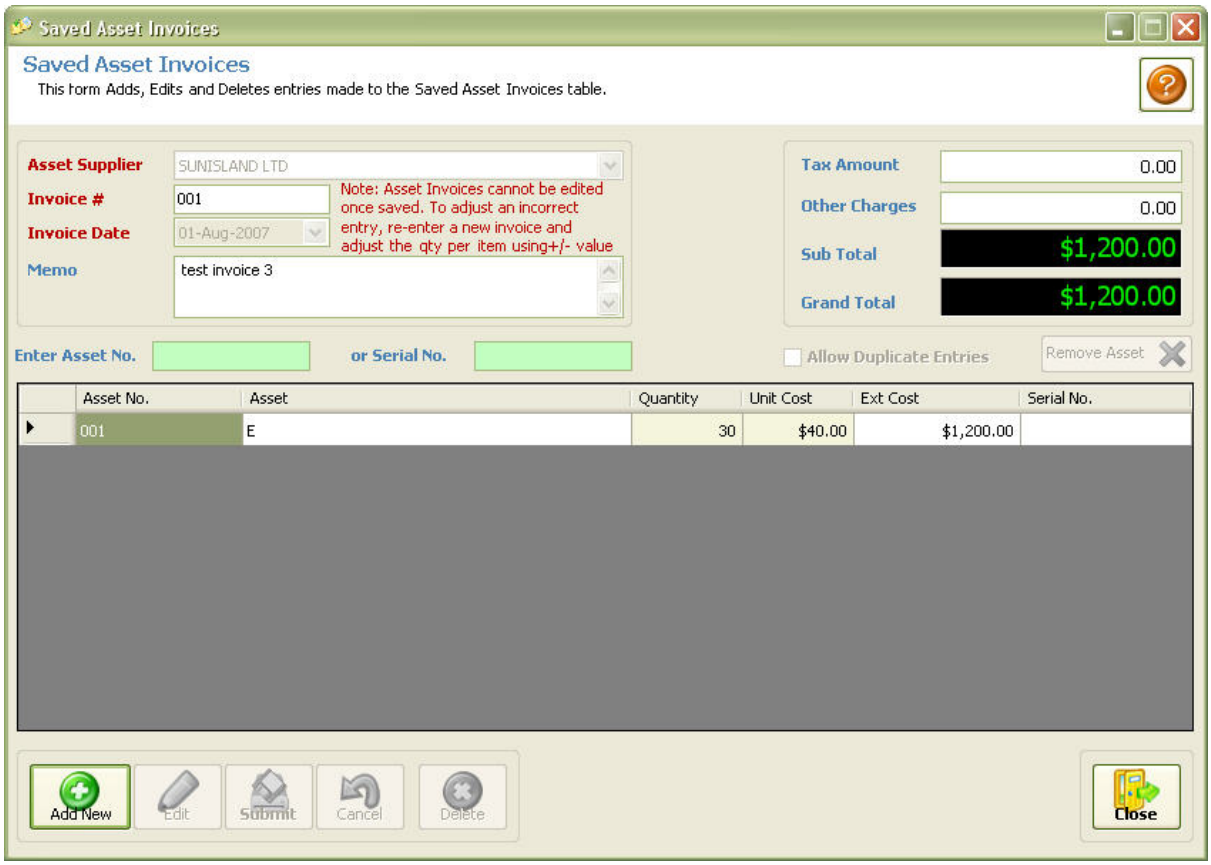


See Add Edit and Delete to learn how to enter information in this screen

Remember to Save Cancel or Close when done!!

4.3.1.3 Saved Asset Invoice

This section keeps a list of all previous received asset invoices are their details for review and adjustment if necessary.

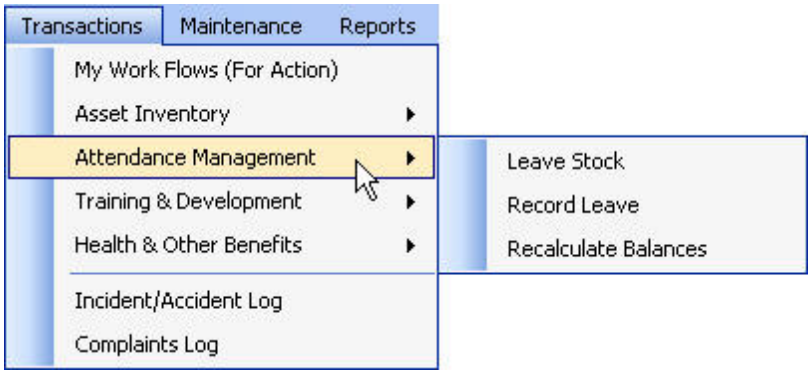


See Add Edit and Delete to learn how to enter information in this screen

Remember to Save Cancel or Close when done!!

4.3.2 Attendance Management

This form maintains an employee's attendance.



Related Topics:

Leave Stock
Record Leave
Recalculate Balances

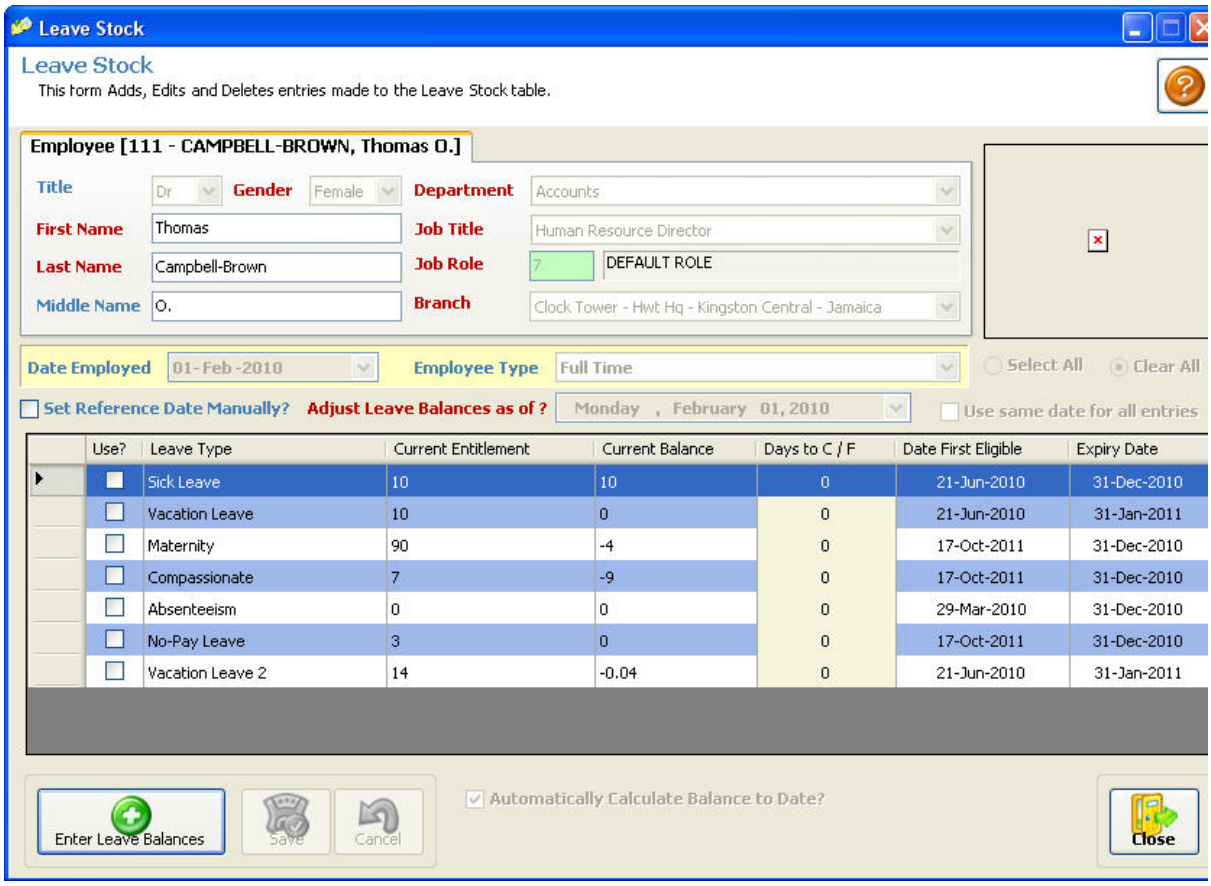
4.3.2.1 Leave Stock

Leave Stock is used to assign leave balances to an employee's profile. You may enter in the Days to C/F column a zero balance when using the Date Employed as the reference date or an audited balance number of days remaining using the audited date as the reference date.

To assign a leave type do the following:

1. Find the employee by using the Browse feature
2. Check the "Set Reference Date Manually" check box and use date employed or set your audited reference date
3. Press the Enter Leave balances button
4. Put a check in the boxes under the "Use" column as those leave entries will be assigned to the employee
5. Enter the available balance (if not zero) in the "Days to C/F" for each leave type selected at step 4
6. Press Save or Submit (if in Transactional Mode)

© 2014 Enter your company name



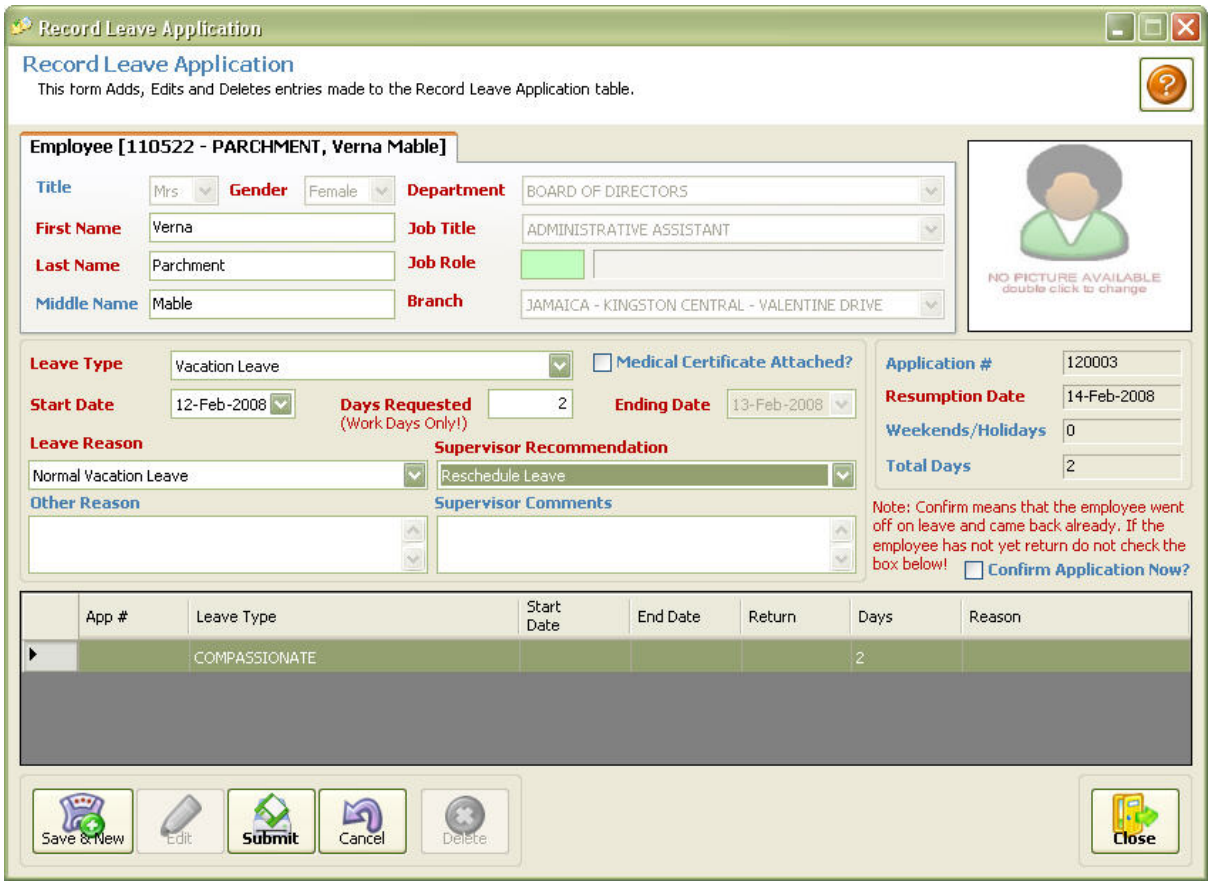
4.3.2.2 Record Leave

Record Leave is used to post all approved leave applications to an employee's file. As these applications are posted, they will adjust the balance remaining to be taken by the employee automatically.

To record a leave application do the following:

1. Find the employee by using the Browse feature
2. Press Add New, fill out the mandatory and other fields then press Save or Submit (if in Transactional Mode)

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

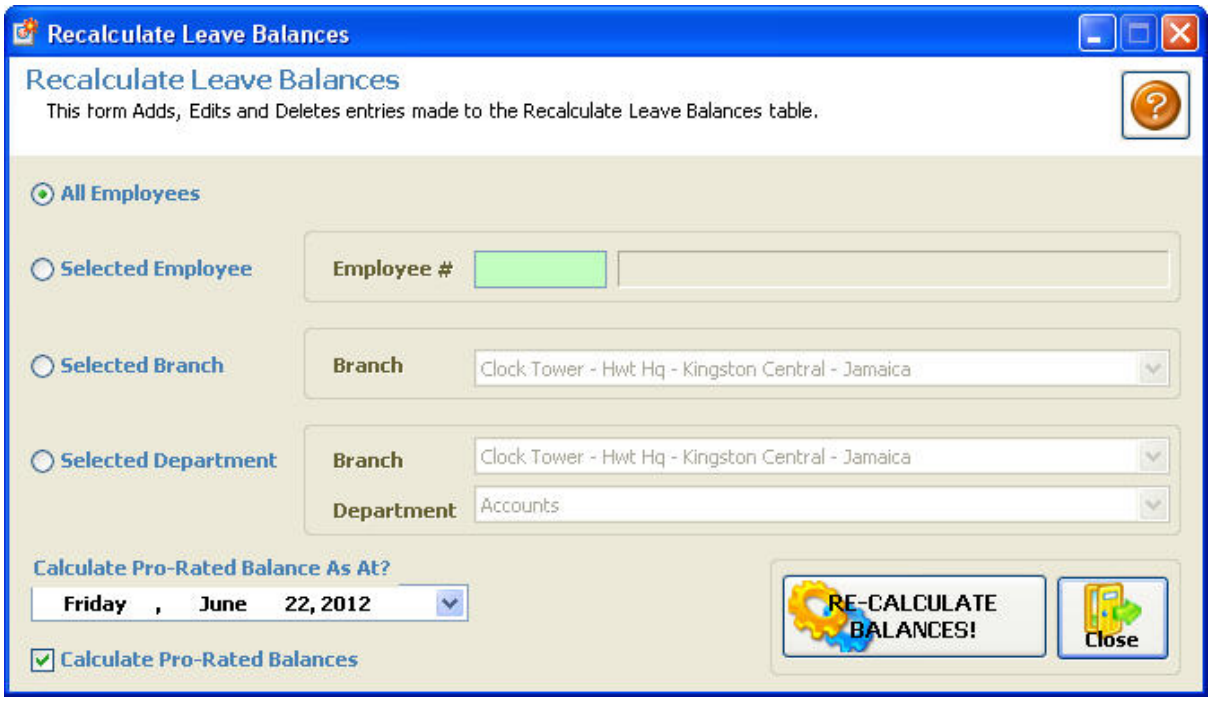


4.3.2.3 Recalculate Balances

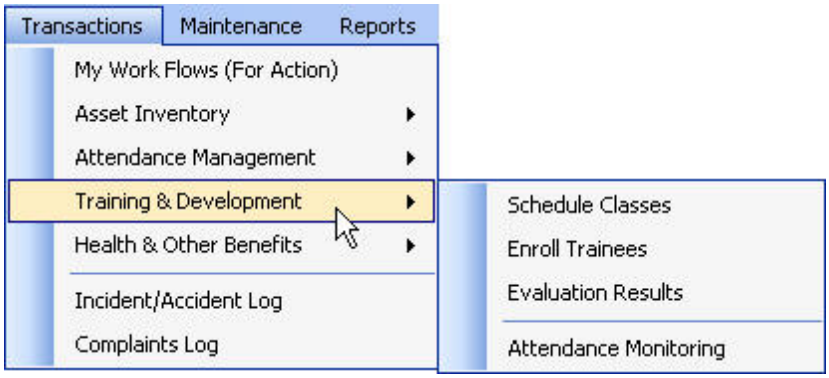
By Default, the software server automatically updates employee leave balances overnight. However, this feature can be used to update the leave balances at any time.

Simple select the calculation option you desire, set your reference date if different from the default and press the RE-CALCULATE BALANCES button.

There are also options on the Attendance tab to calculate balances for individual employees.



4.3.3 Training and Development



Related Topics

Schedule Classes
Enroll Trainees
Evaluation Results
Attendance Monitoring

4.3.3.1 Schedule Classes

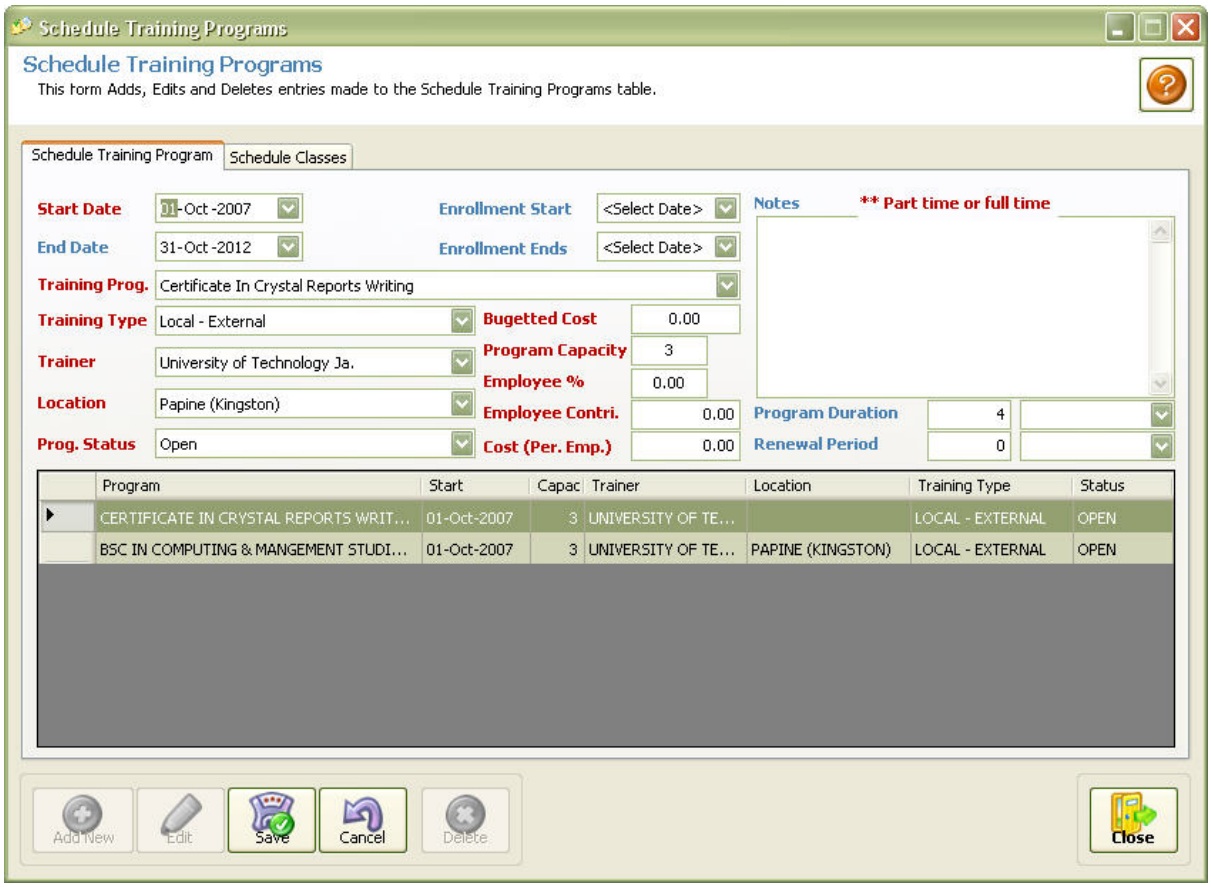
This form maintains the scheduled training programs and classes for the employee. The data submitted must include the following: Training program, type, trainer, location, program status, budgeted program capacity, employee's percentage, contribution and

© 2014 Enter your company name

the cost per employee to participate in the training program.

To enroll and unlimited number of employees in a training program, set the program capacity to zero (0).

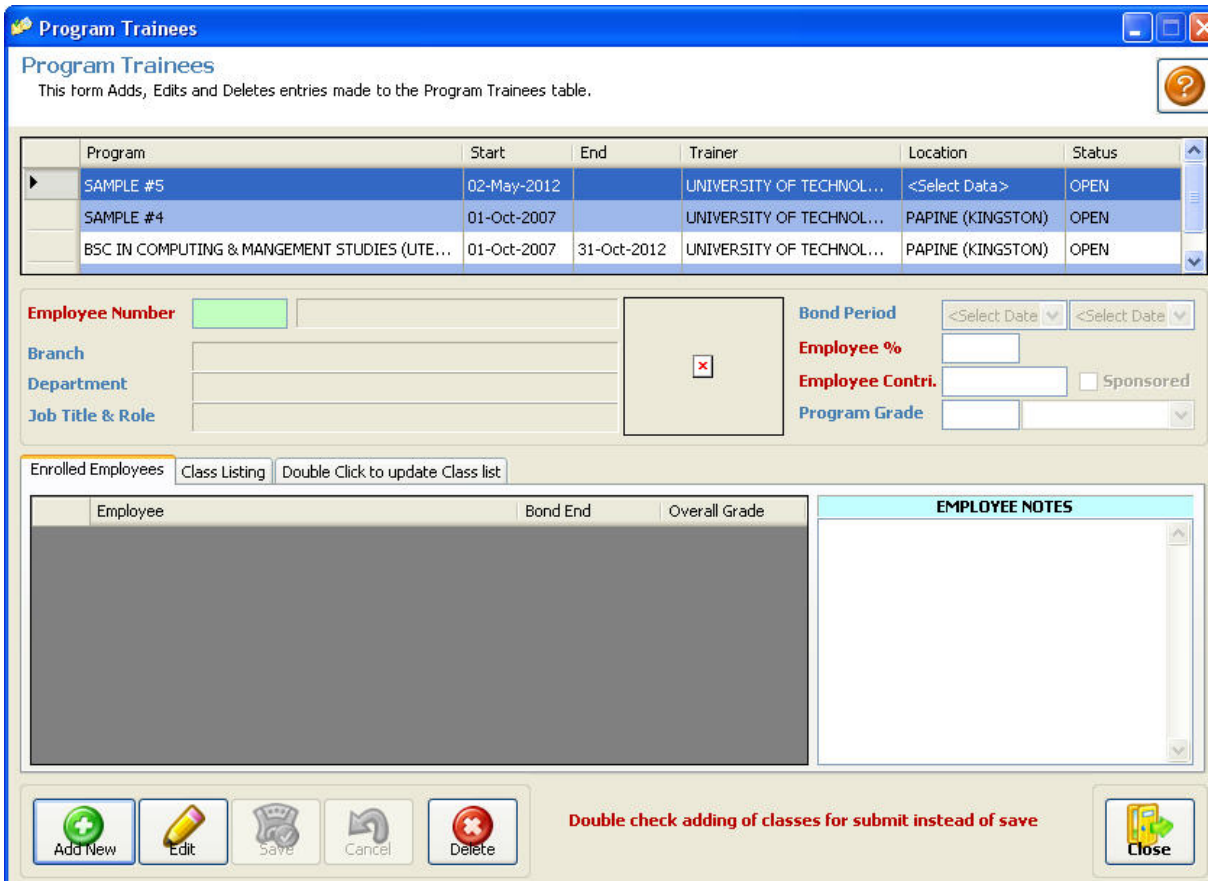
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.3.3.2 Enroll Trainees

This form maintains a list of employees to individual course works. Data submitted to this form must include the employee's number, percentage and contribution.

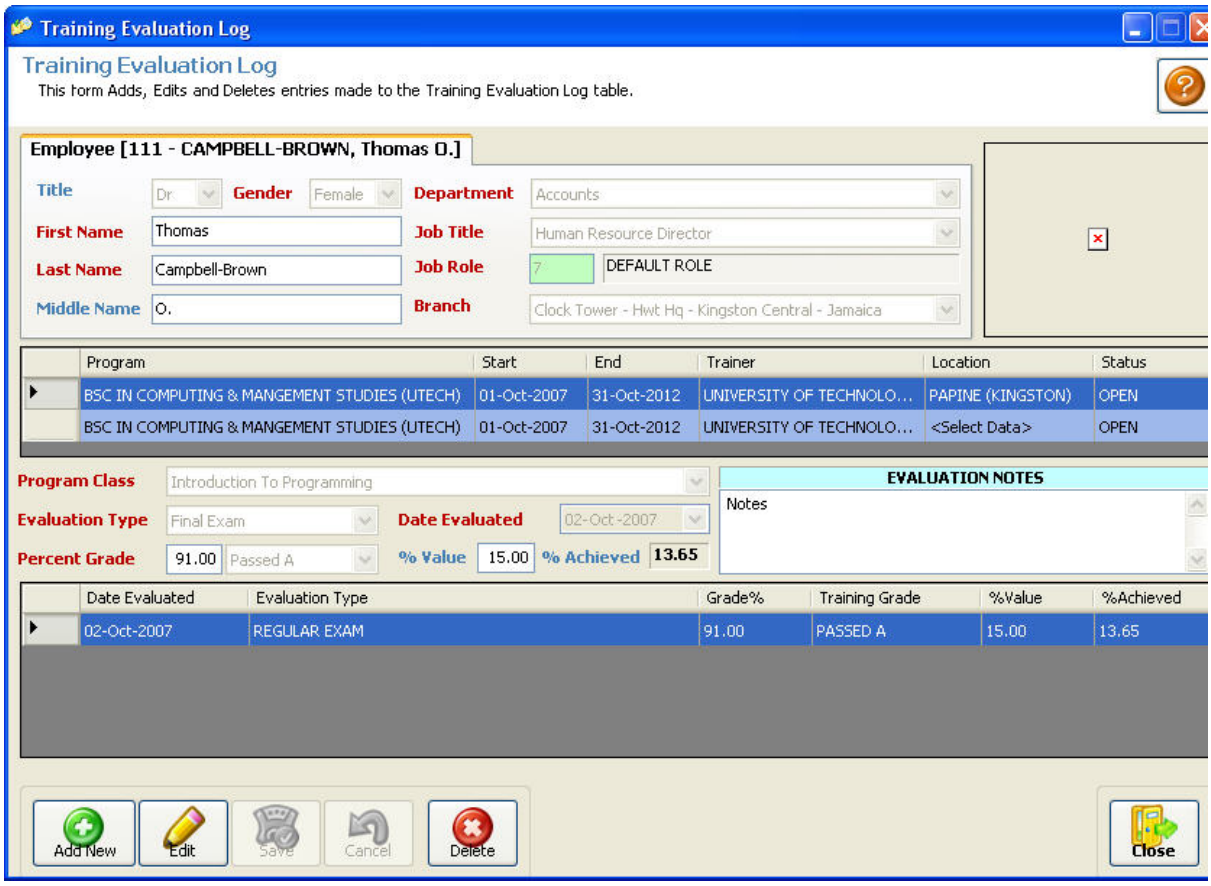
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.3.3.3 Training Evaluation Log

This form maintains a log of the evaluations generated from the training programs attended by employees. Data submitted must include the following: employee name, department, job title, program class, evaluations type, date of evaluation and percent grade.

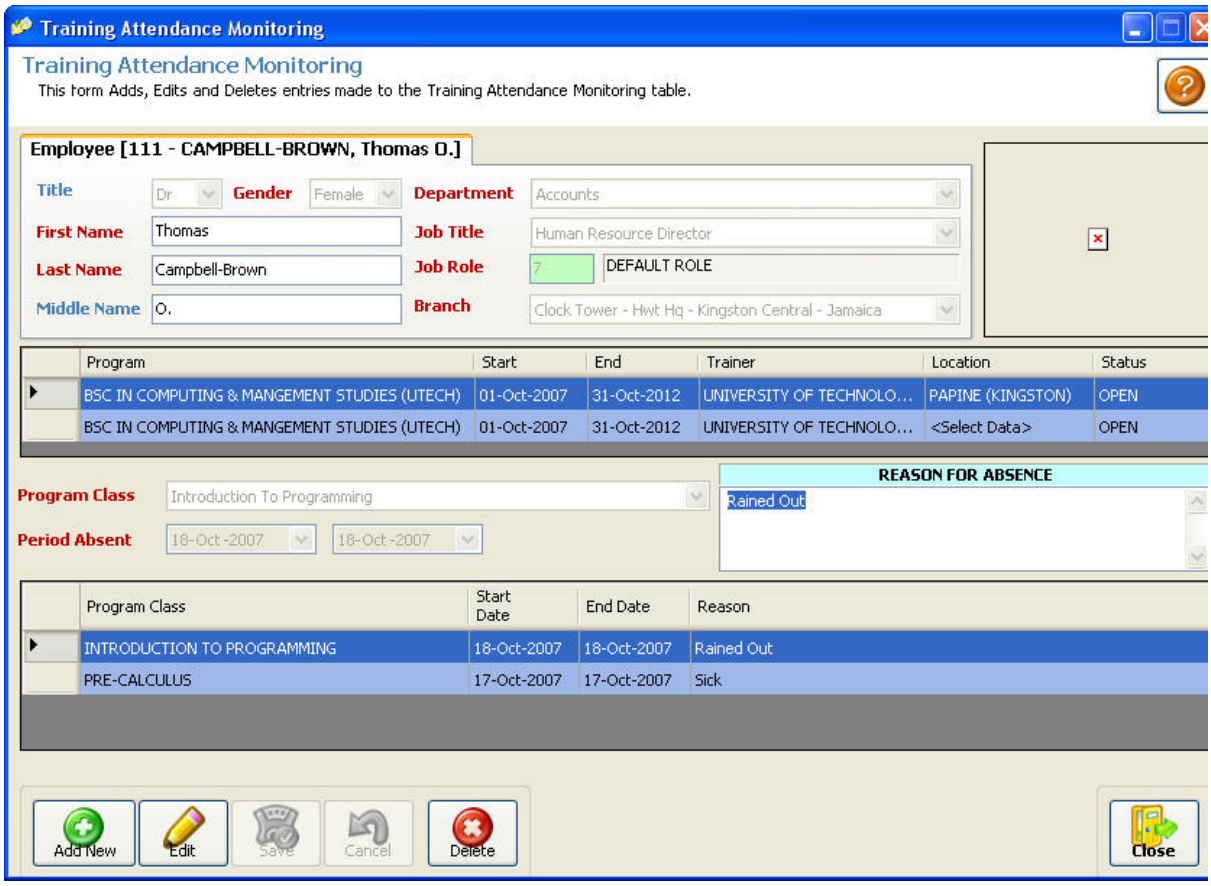
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.3.3.4 Training Attendance Monitoring

This form maintains the monitoring of the employees' absence from any enrolled training program.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.4 Maintenance Record

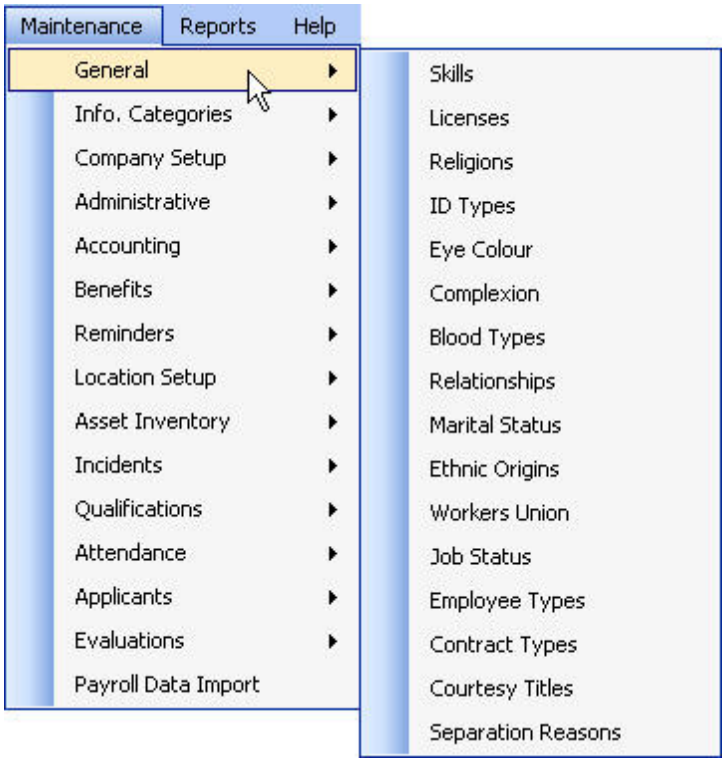
Maintenance menu contains all supporting data elements for each module of SMART Staff Manager HRM software.

Related Topics:

General
Information Categories
Company Setup
Administrative
Accounting
Benefits
Location Setup
Asset Inventory
Incidents
Qualifications
Attendance
Applicants
Evaluations
Payroll Data Import

4.4.1 General

Maintenance Menu: General Category



Related Topics

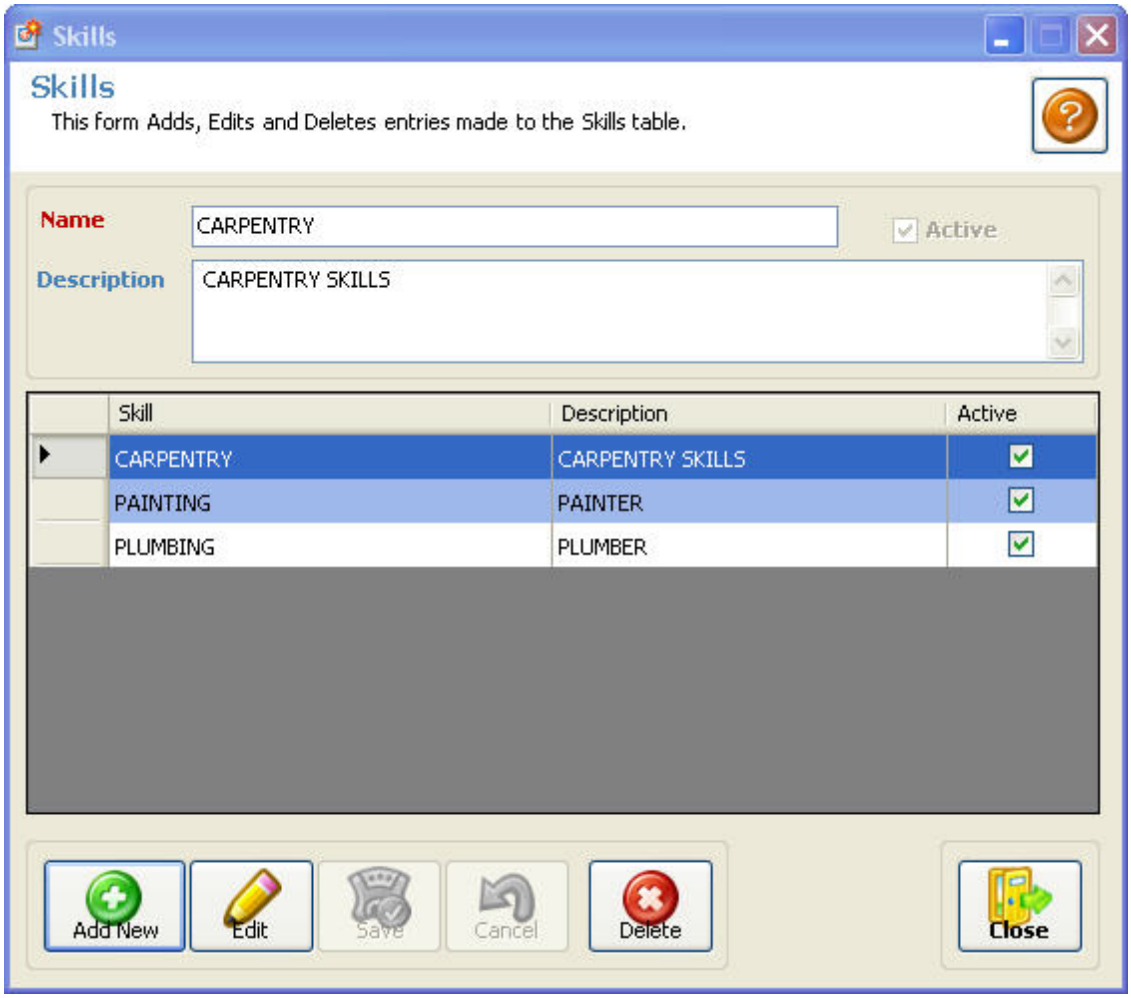
Skills
License
Religions
ID Types
Eye Colour
Complexion
Blood Types
Relationships
Ethinic Origins
Workers Union
Job Status
Employee Types
Courtesy Titles
Separation Reasons
Contract Types

4.4.1.1 Skills

This form allows for the maintenance of the list of skills attained by the employee. Two examples of these would be Carpentry and Plumbing.

© 2014 Enter your company name

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

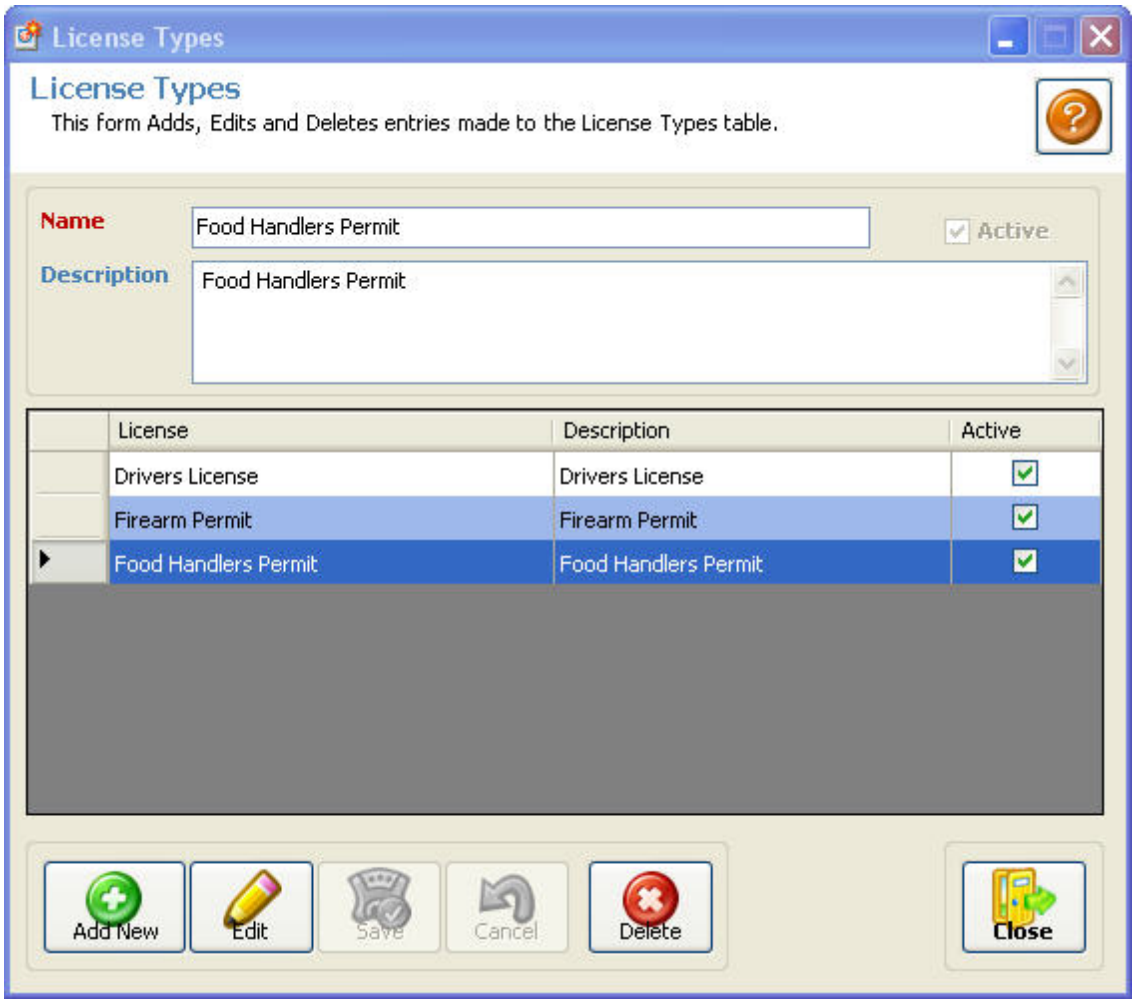


4.4.1.2 License

This form maintains the types of licenses held by the employee. An example of this would be Driver's License.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

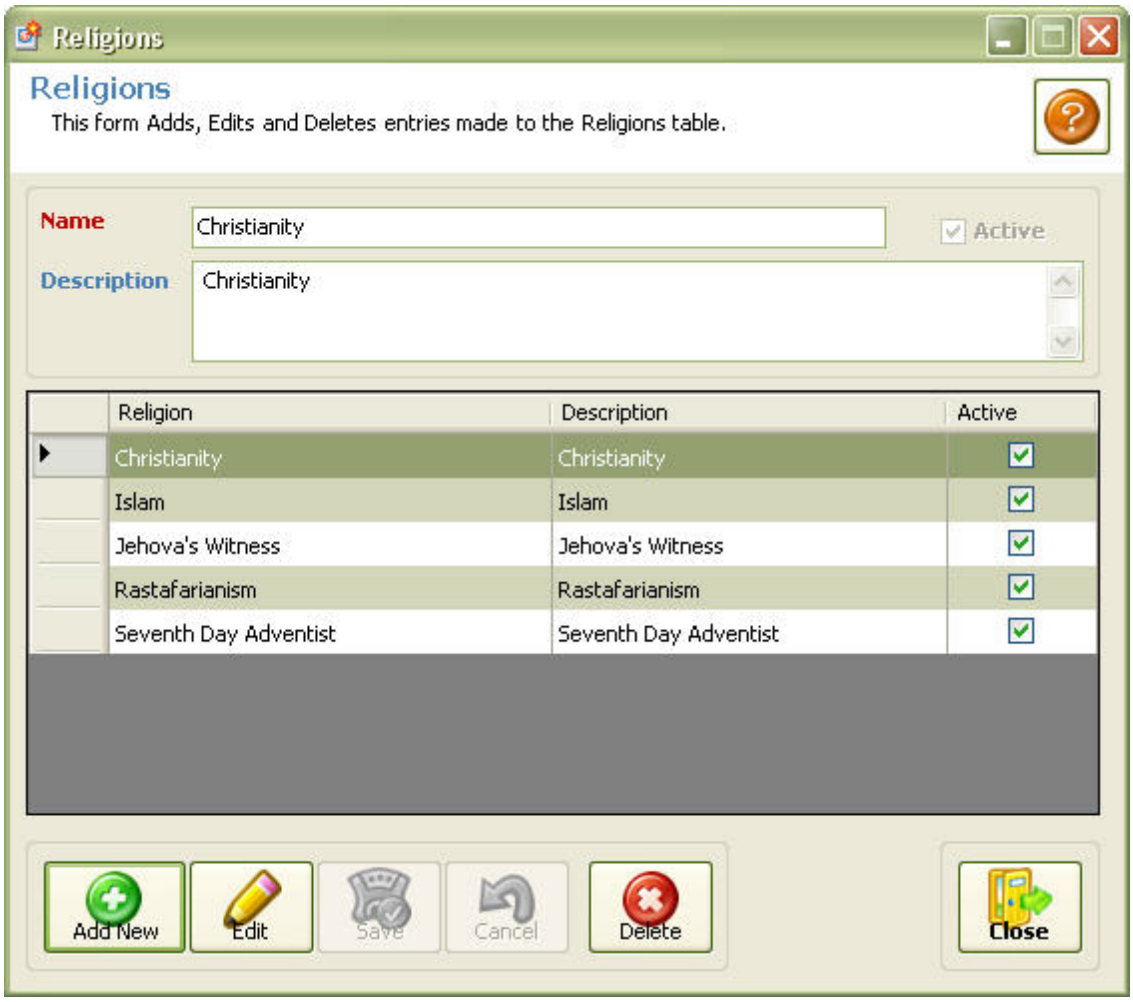
© 2014 Enter your company name



4.4.1.3 Religions

This form maintains a list of religions that an employee may participate in. A few examples of these religions would be Rastafarianism, Christianity or Islam.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

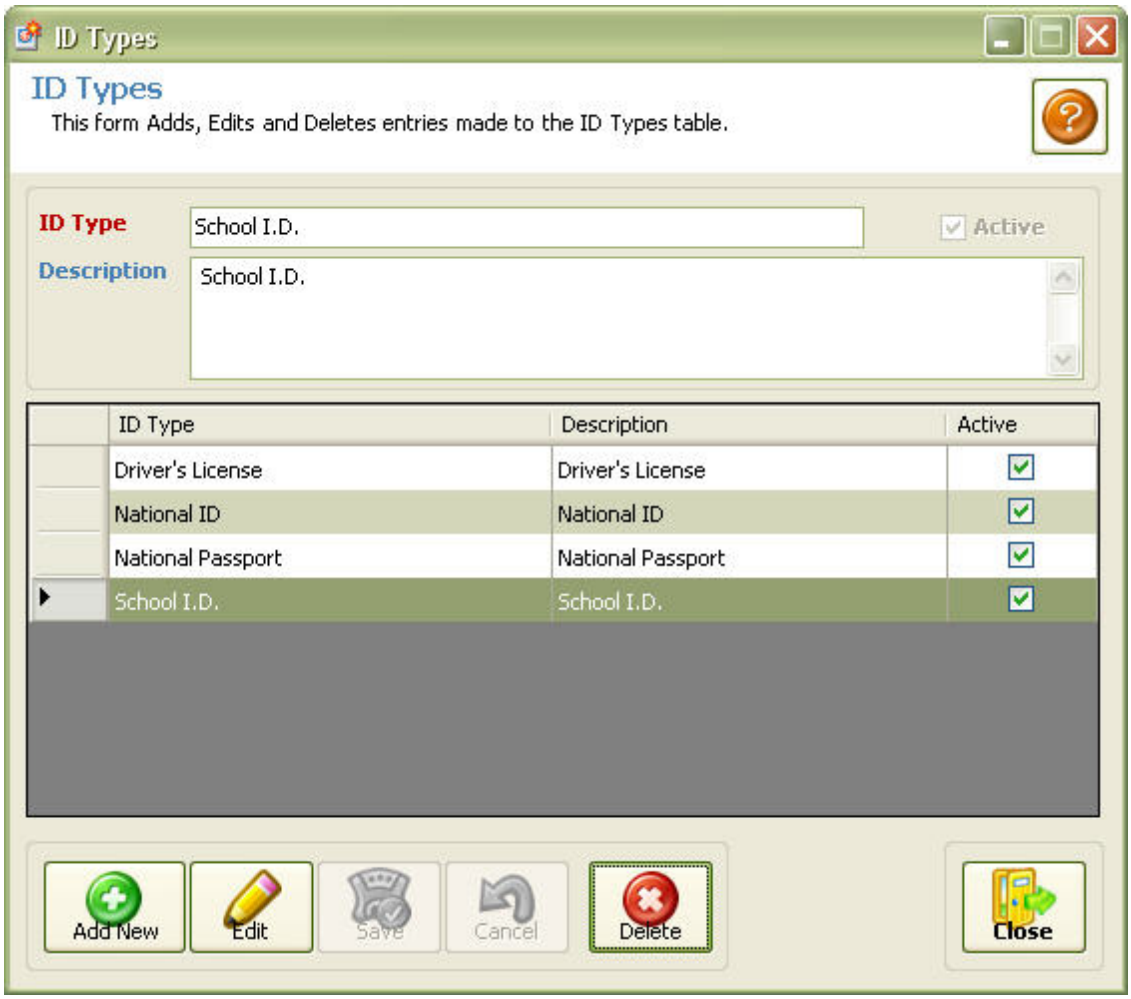


4.4.1.4 ID Types

This form maintains the list of various types of Identification held by the employee. Where an employee may have two forms of identification, this form allows for the user to submit both IDs. Two examples are passport and drivers license.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

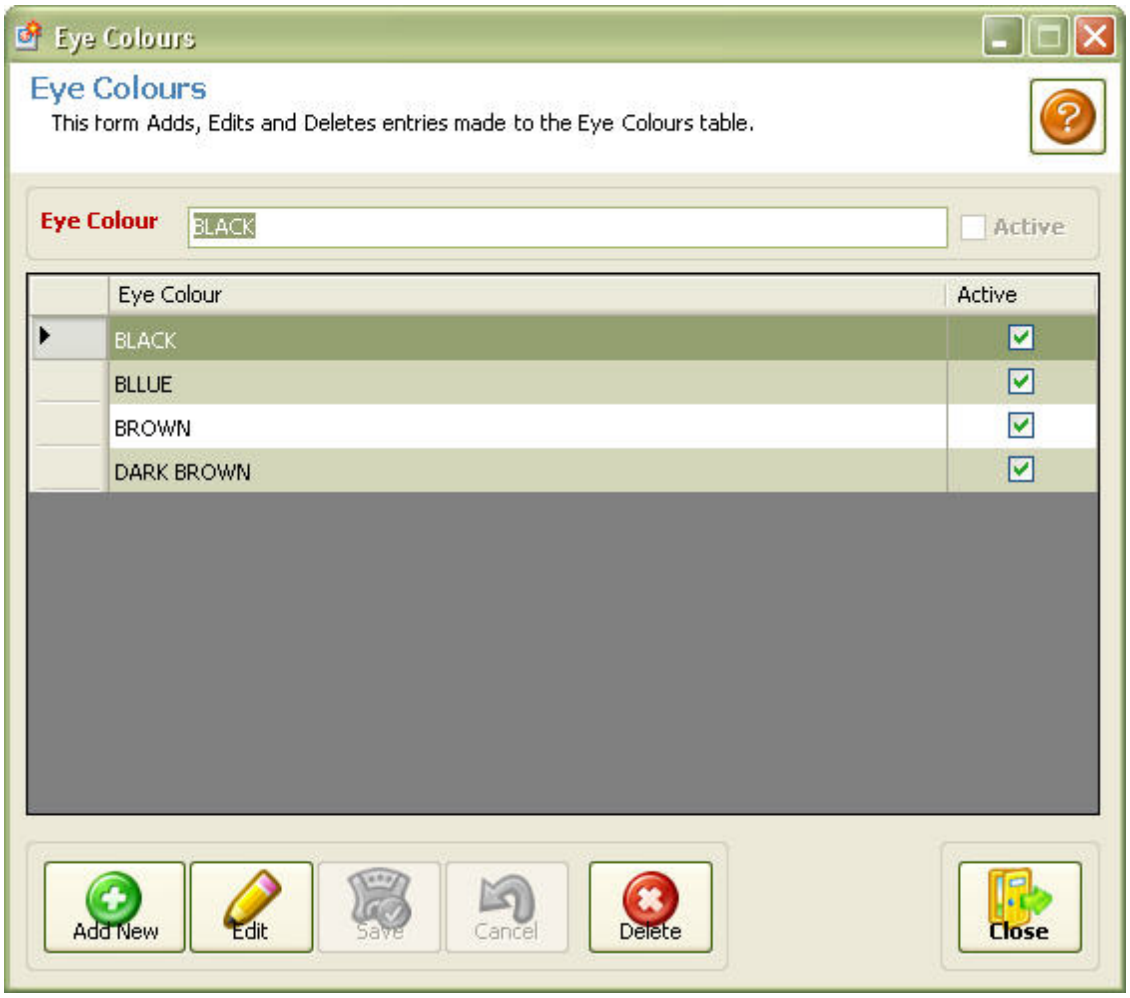
© 2014 Enter your company name



4.4.1.5 Eye Colour

This form allows the maintaining of the various eye colours of the members of staff within an institution. For example dark brown and hazel.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

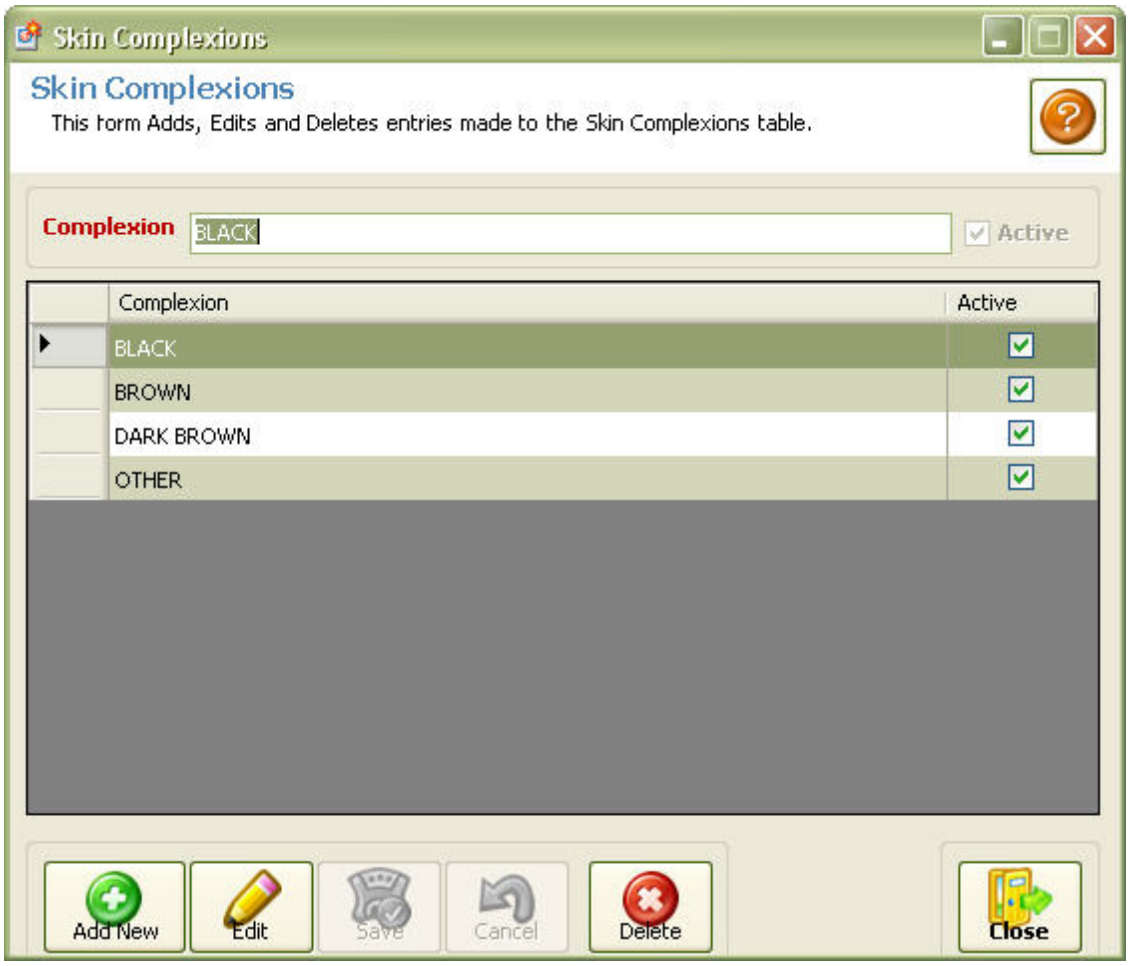


4.4.1.6 Complexion

This form maintains a list of complexions. Since members of staff, will not all share the same complexion, this form allows the user to specify an employees complexion. Examples of these are Brown, dark brown, white etc.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

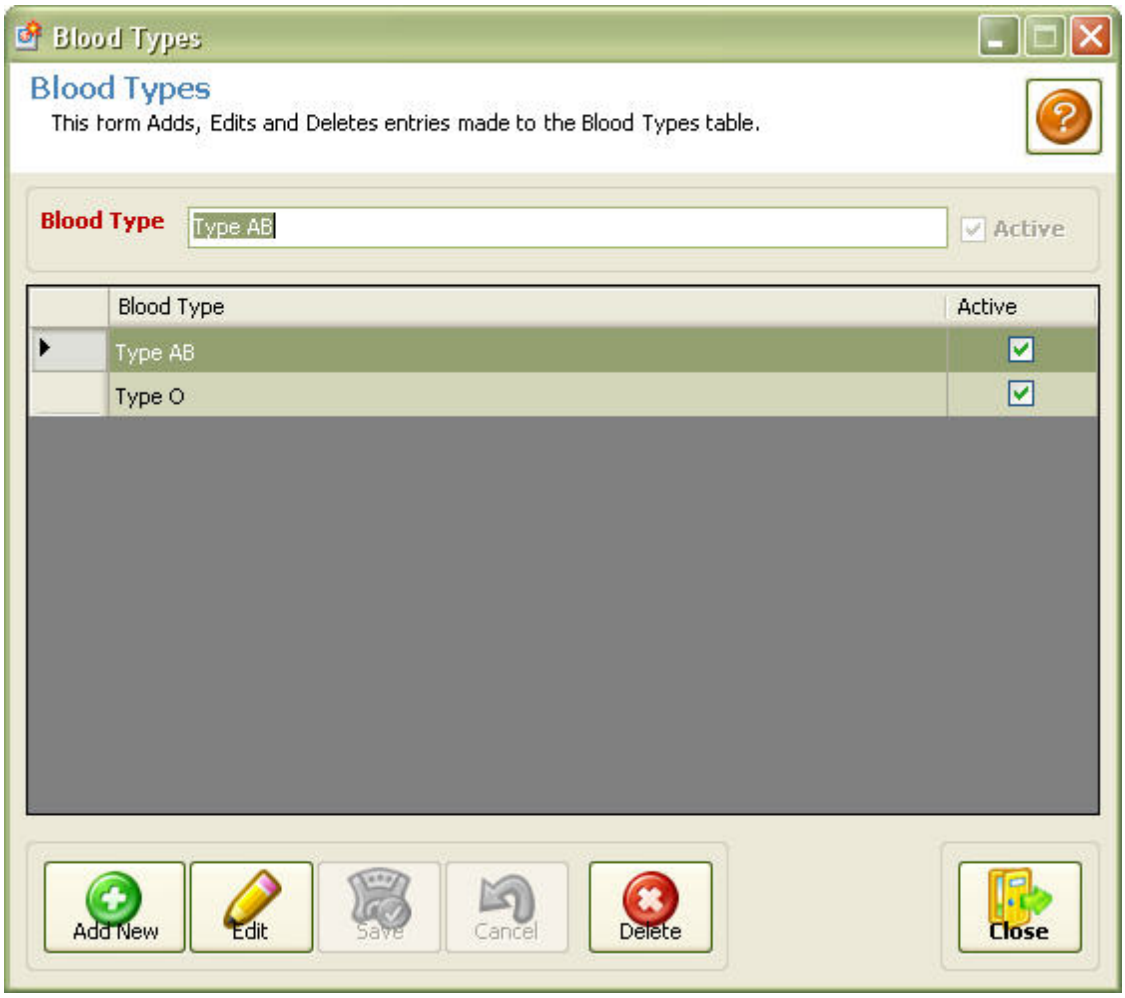
© 2014 Enter your company name



4.4.1.7 Blood Types

This form allows for the maintenance of the blood types of current members of staff. Examples of these include Type A and O.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

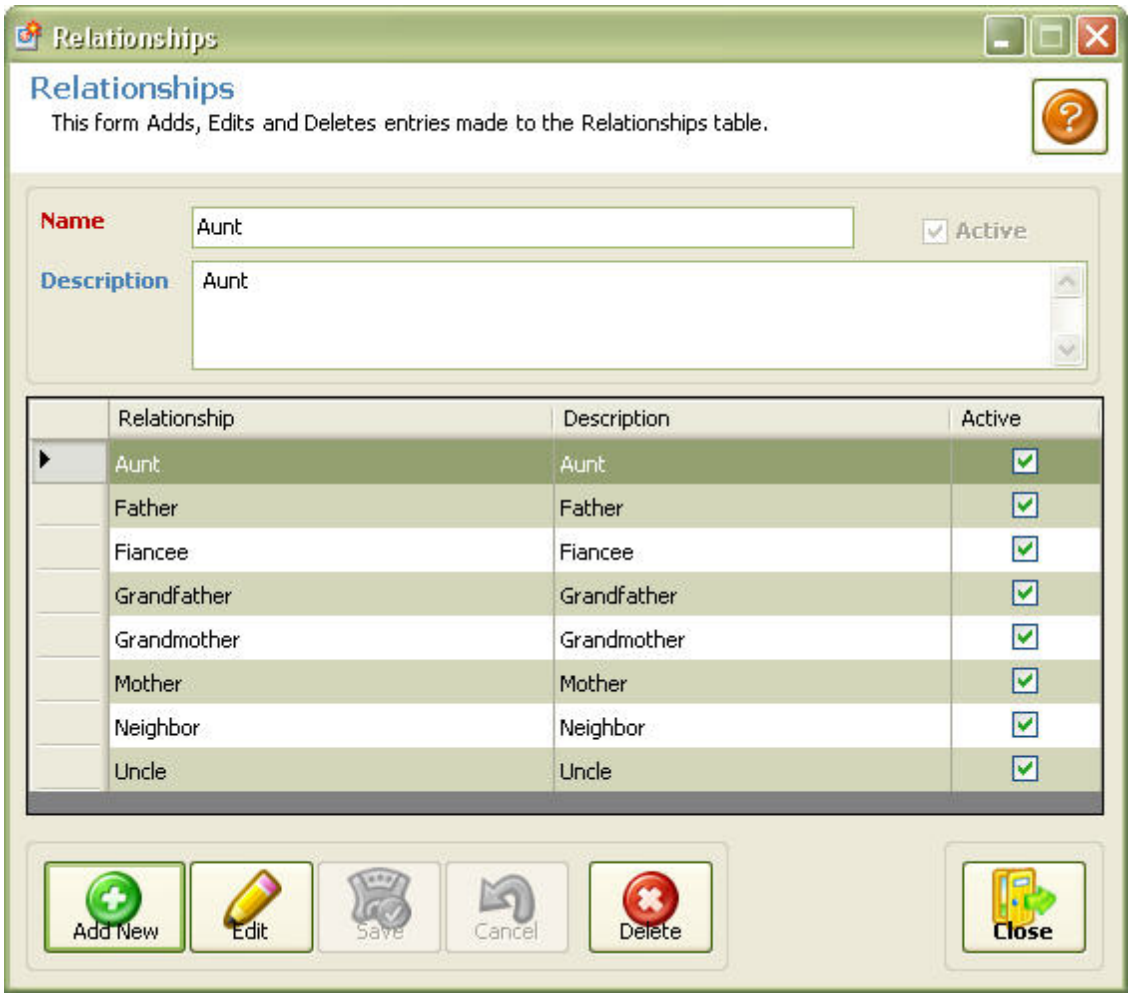


4.4.1.8 Relationships

The form maintains a list of contact information for individuals who are or may be related to an employee. The form edits name, gender and telephone numbers, in case of an emergency.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

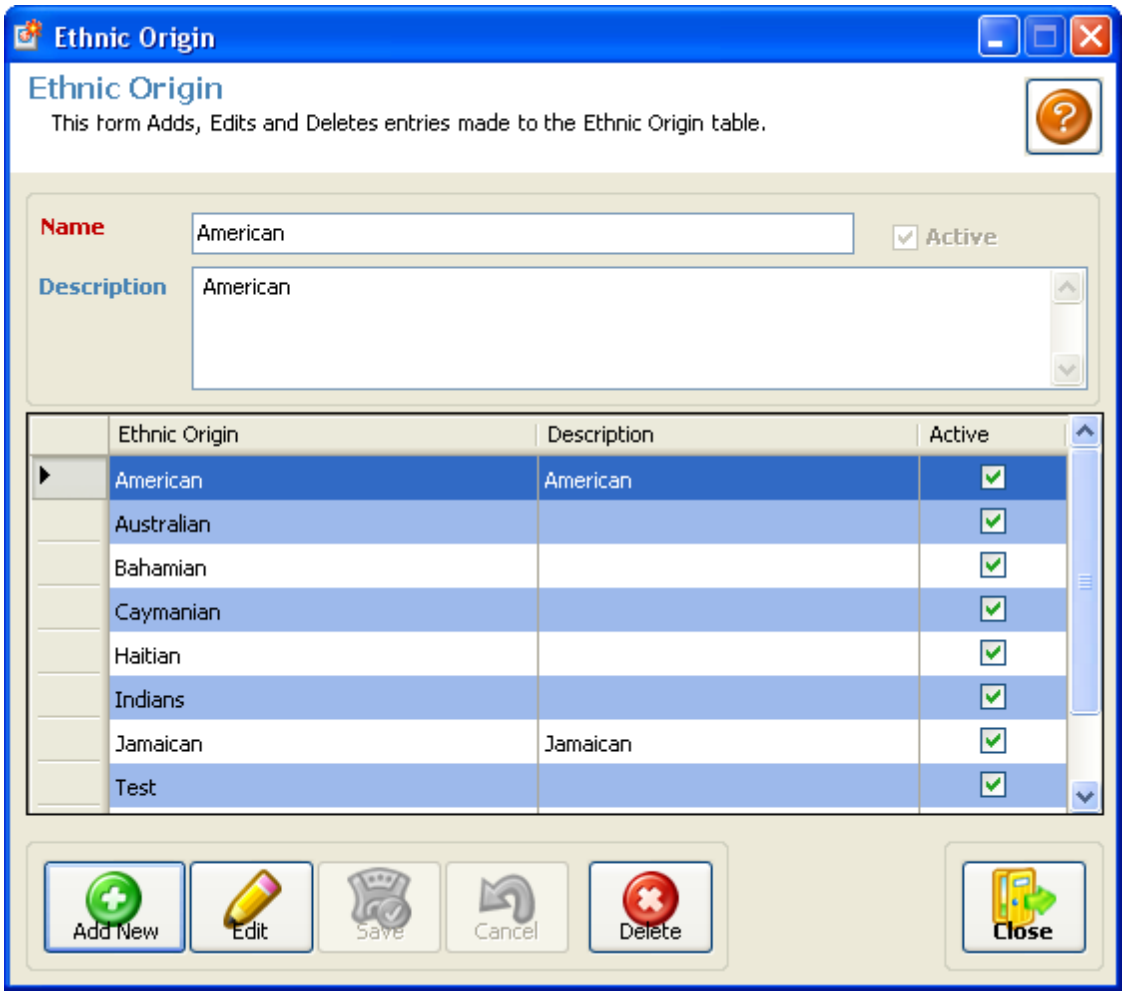
© 2014 Enter your company name



4.4.1.9 Ethinic Origins

This form maintains the list of ethnic origins [nationality] of employees within the organization. for example: Chinese and Jamaican.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

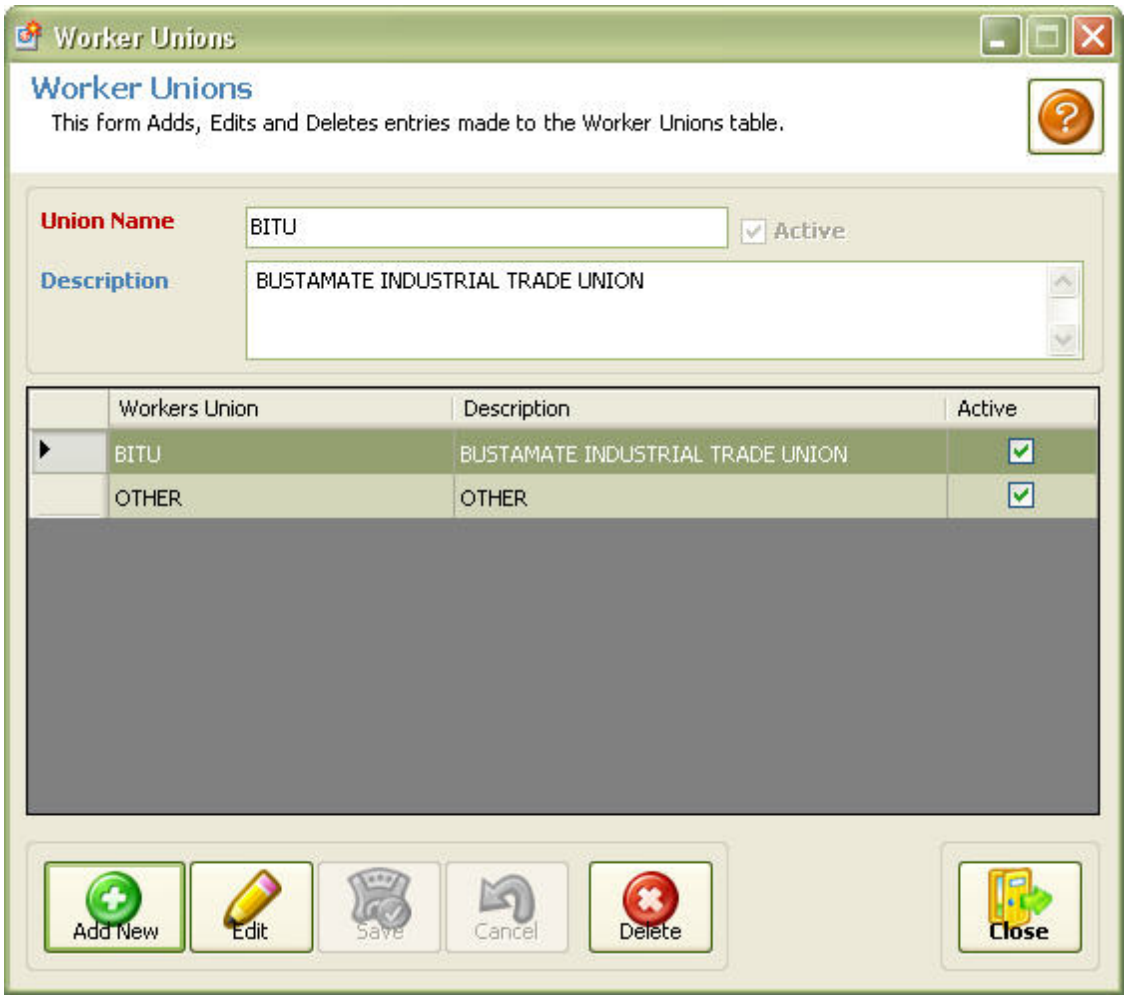


4.4.1.10 Workers Union

This form maintains a list of Trade Unions that employees may have been assigned to. An example of a trade union would be the BITU – Bustamante Industrial Trade Union.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

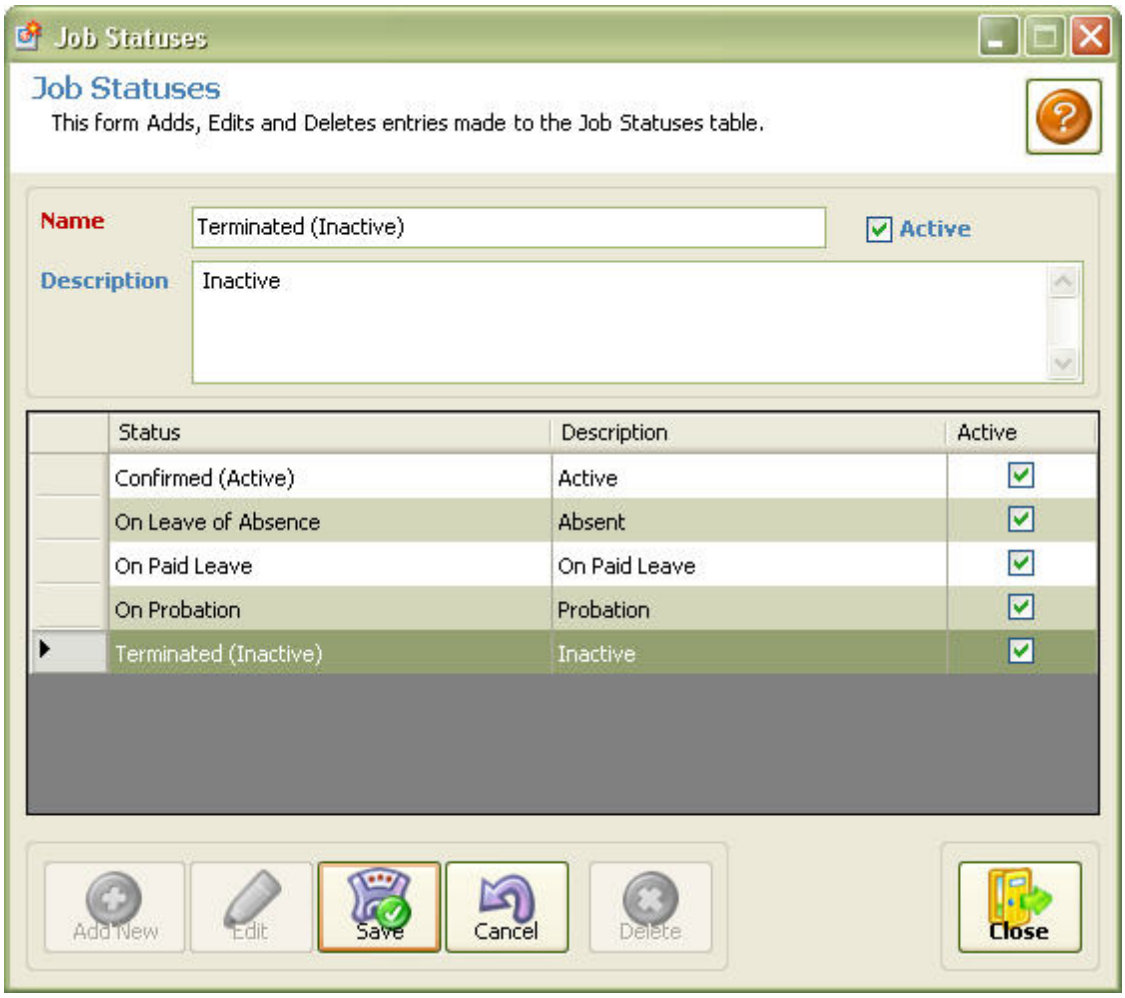
© 2014 Enter your company name



4.4.1.11 Job Status

The form allows for the maintenance of an employee's current job status within the entity. For example an employee may be on probation; this form allows the user to update the employees status from being permanent/on staff to a probationary status.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

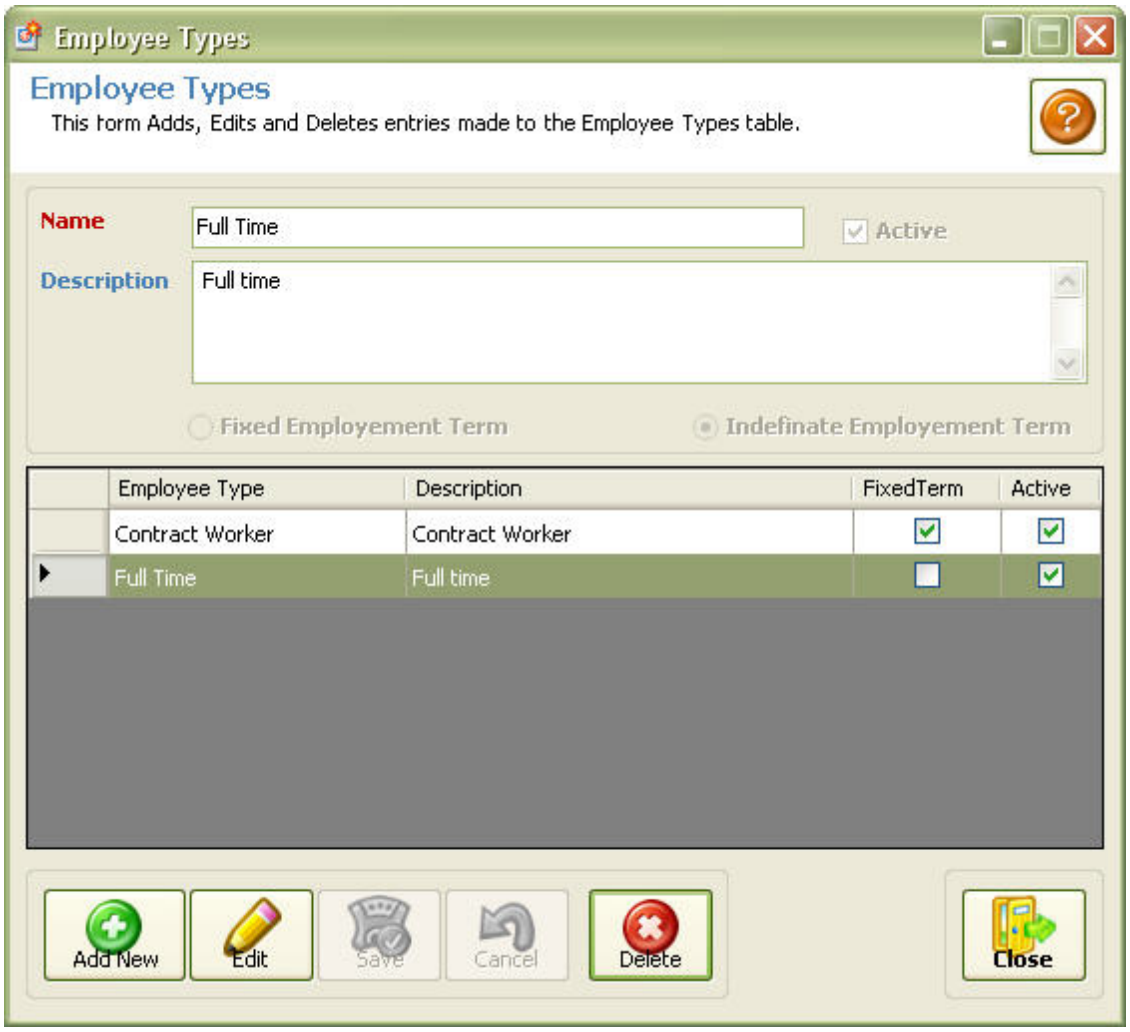


4.4.1.12 Employee Types

Each organization has various types of employment which is offered to staff. This form allows maintaining the types of employment. Examples of these include: contractual, temporary and permanent.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

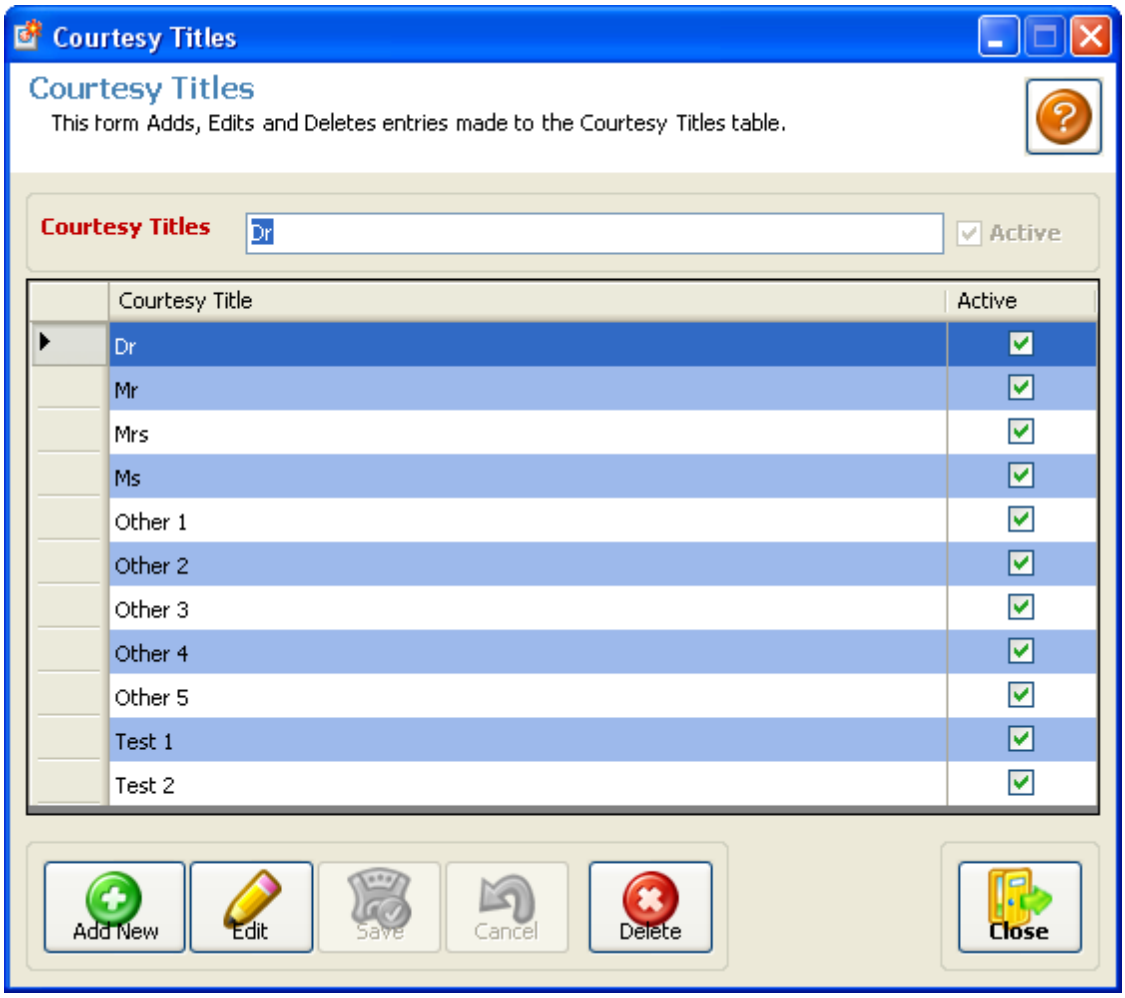
© 2014 Enter your company name



4.4.1.13 Courtesy Titles

This form maintains a list of courtesy titles that may be applicable to the varying members of staff. Two examples of these are Dr. and Ms.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

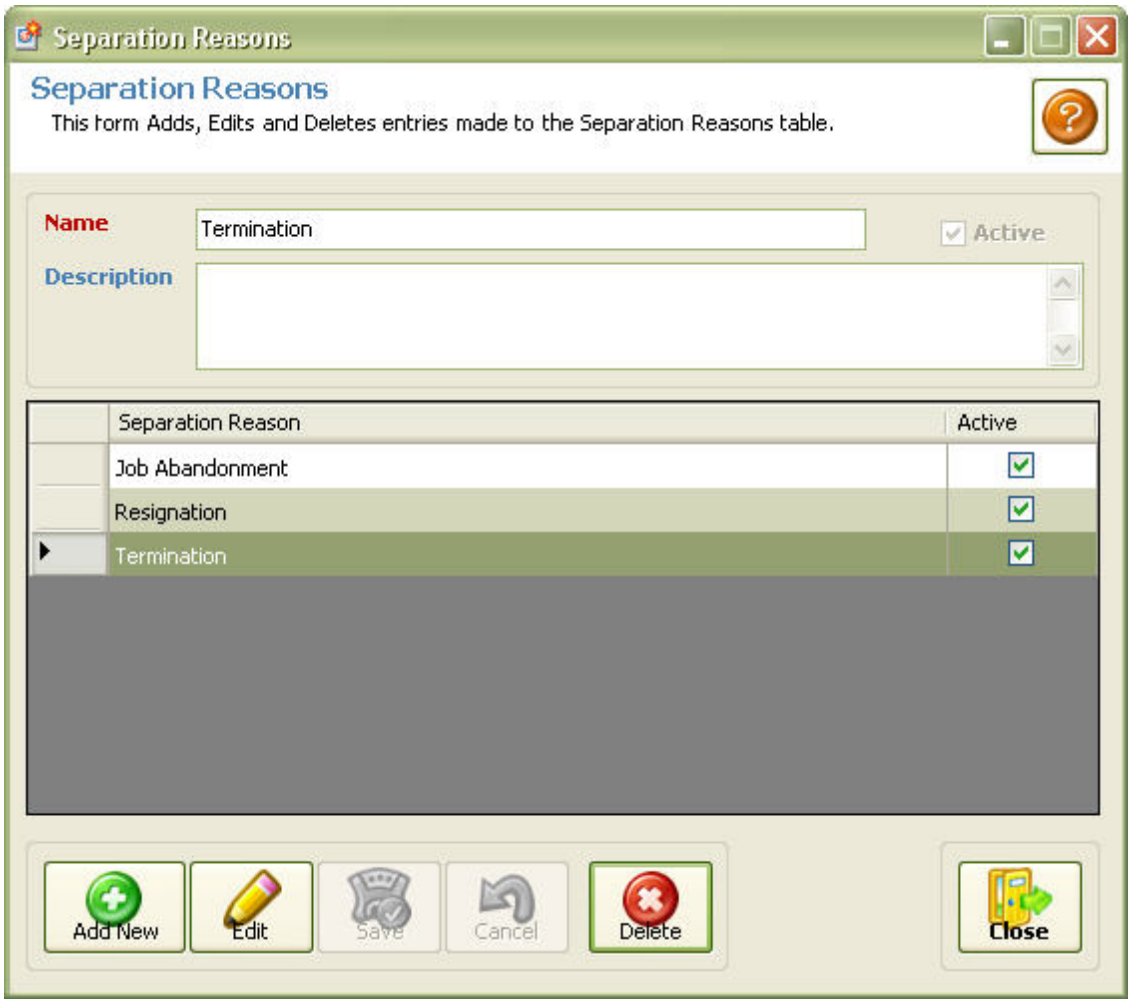


4.4.1.14 Separation Reasons

This form maintains a list of reasons for separation between an employee and his/her employer. Data submitted to this form must include the name of the reason for the separation; a brief description may be added as well.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

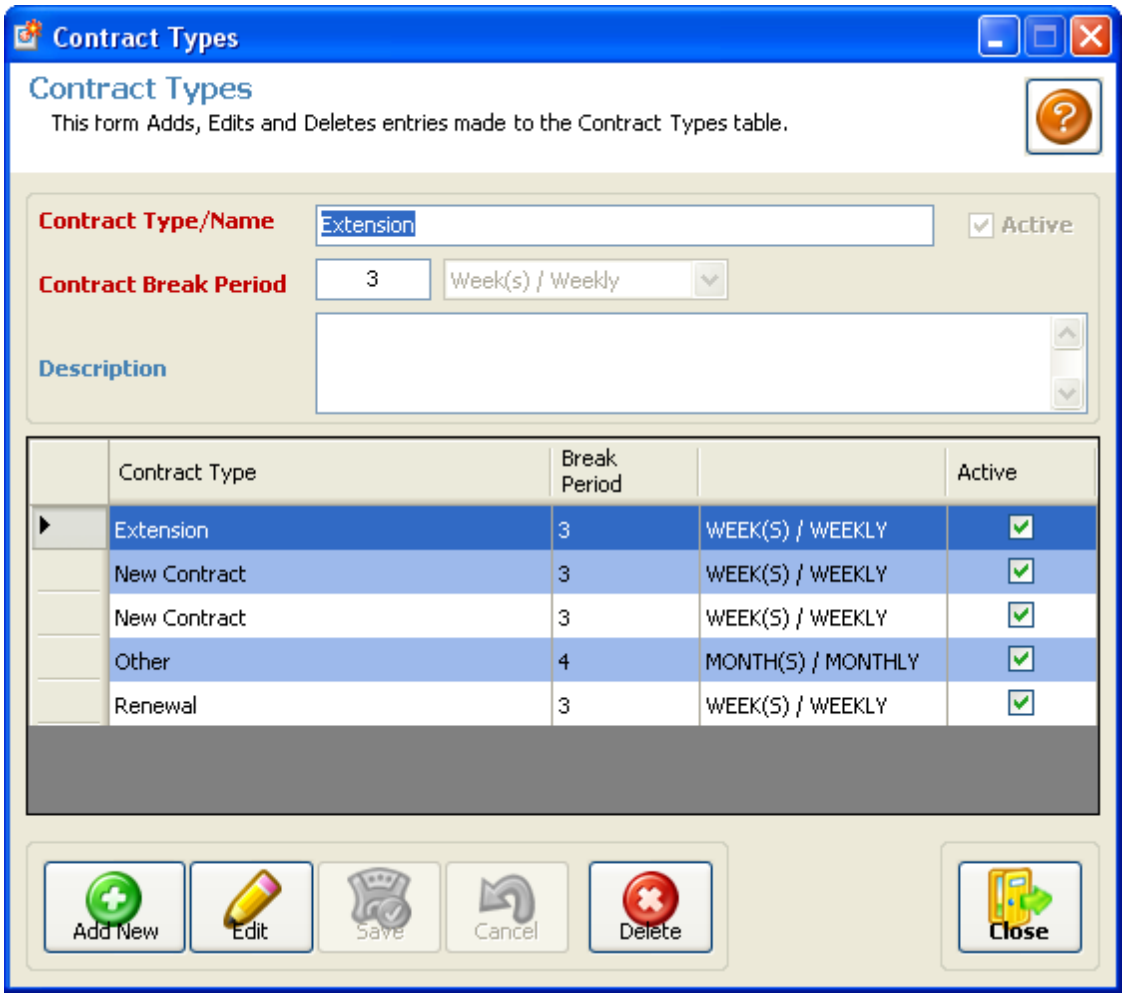
© 2014 Enter your company name



4.4.1.15 Contract Types

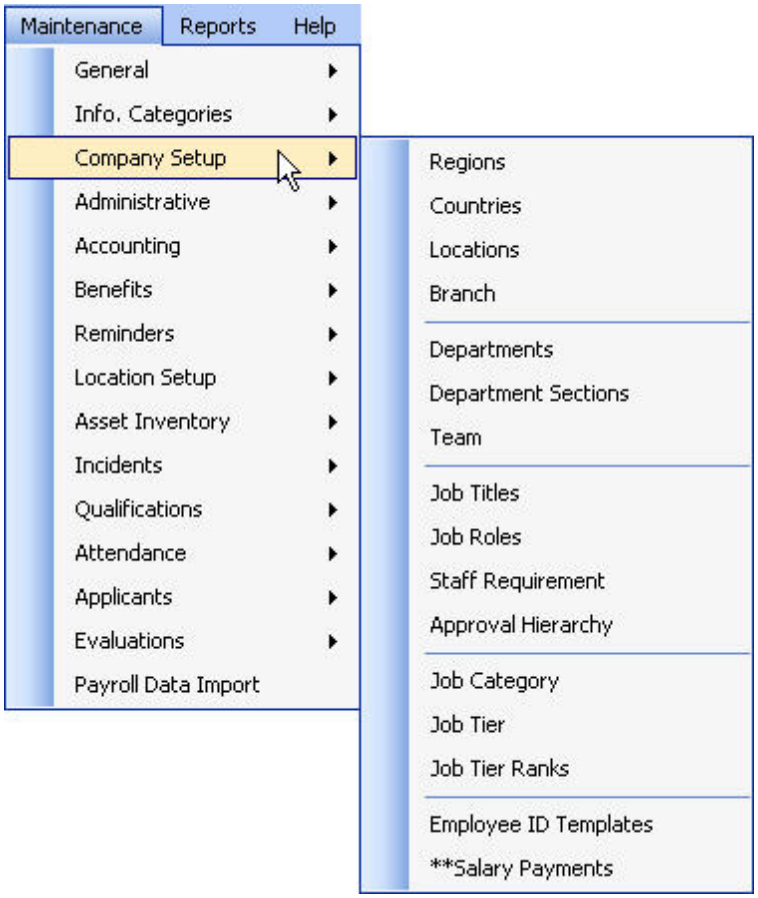
This form maintains a list of Contract Types that employees may have been assigned to. An example of Contract Types would be Extension.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.4.2 Company Setup

Maintenance Menu: Company Setup Category



Related Topics:

Regions
Countries
Locations
Branches
Departments
Department Sections
Team
Job Titles
Job Roles
Staff Requirements
Approval Hierarchy
Job Category
Job Tier
Job Tier Ranks
Employee ID Templates

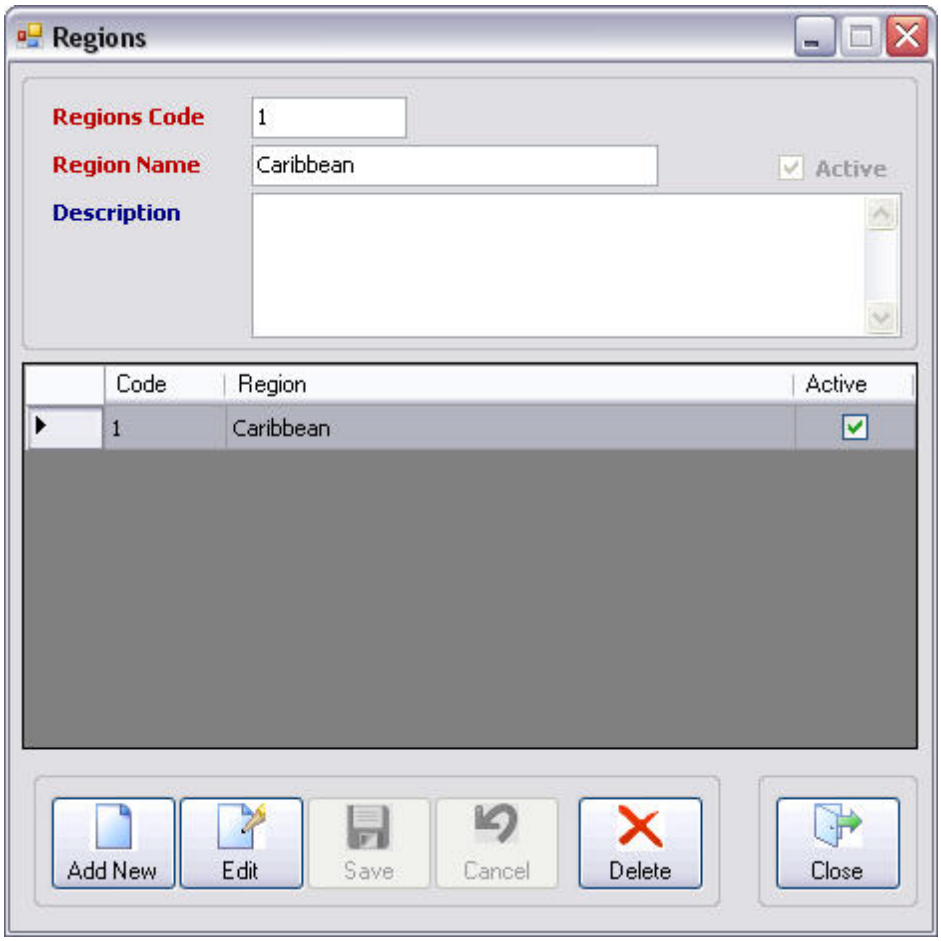
© 2014 Enter your company name

Salary Payments

4.4.2.1 Regions

This form maintains a list of company location. An example of Regions would be the Caribbean or North America.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

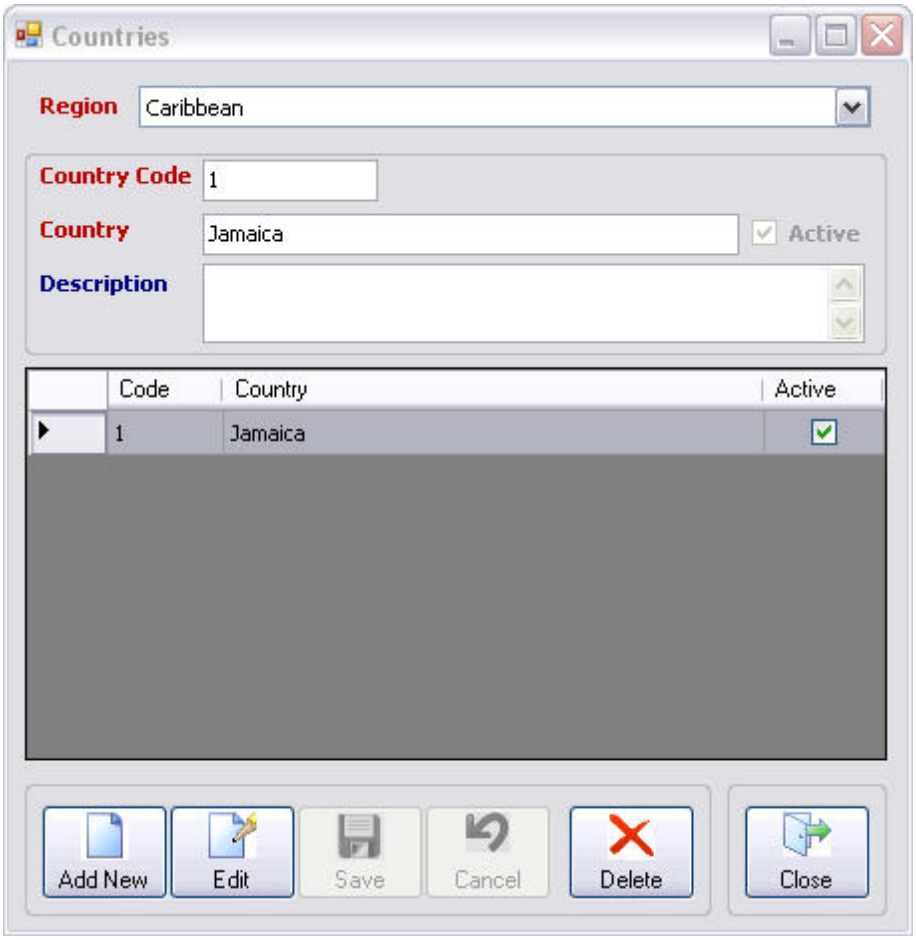


4.4.2.2 Countries

This form maintains a list of Countries branches are located.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

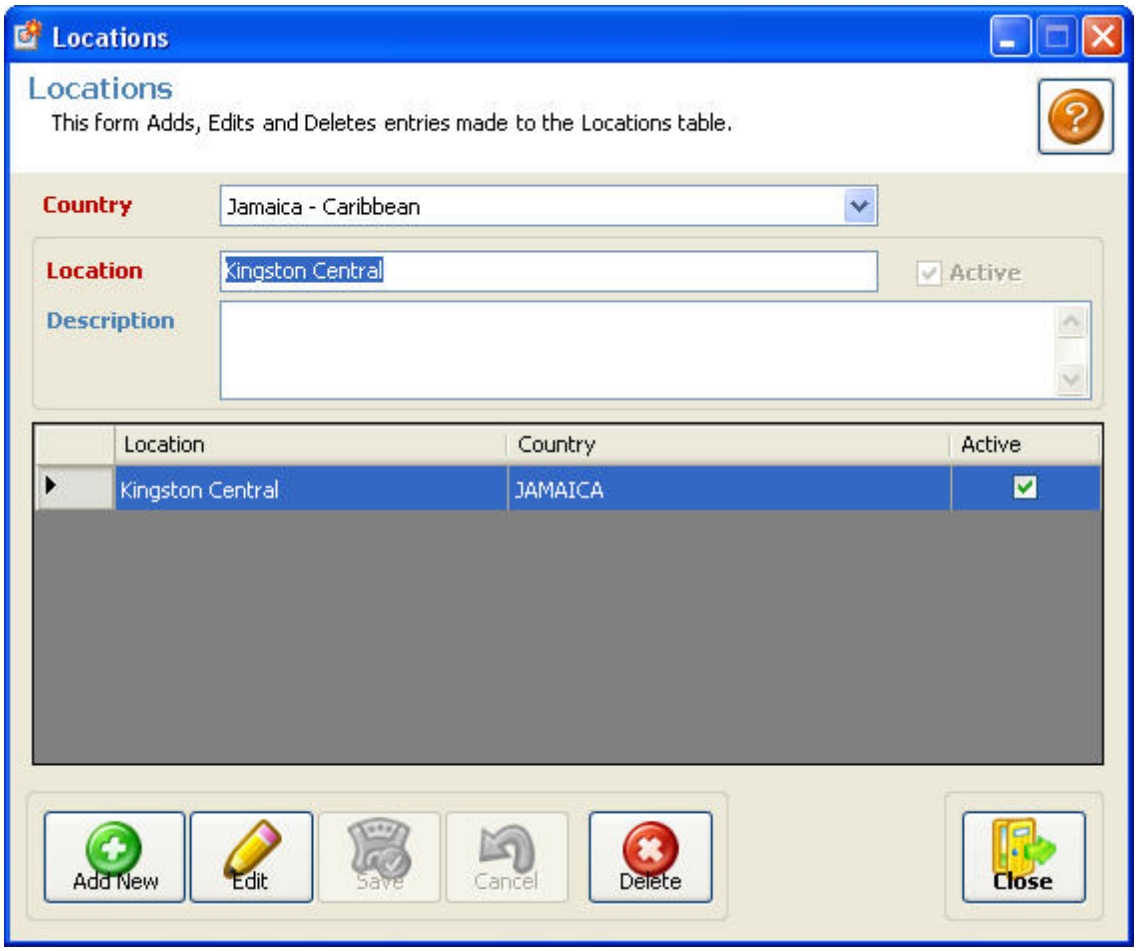
© 2014 Enter your company name



4.4.2.3 Locations

This form maintains a list of entries made to the Location Table.

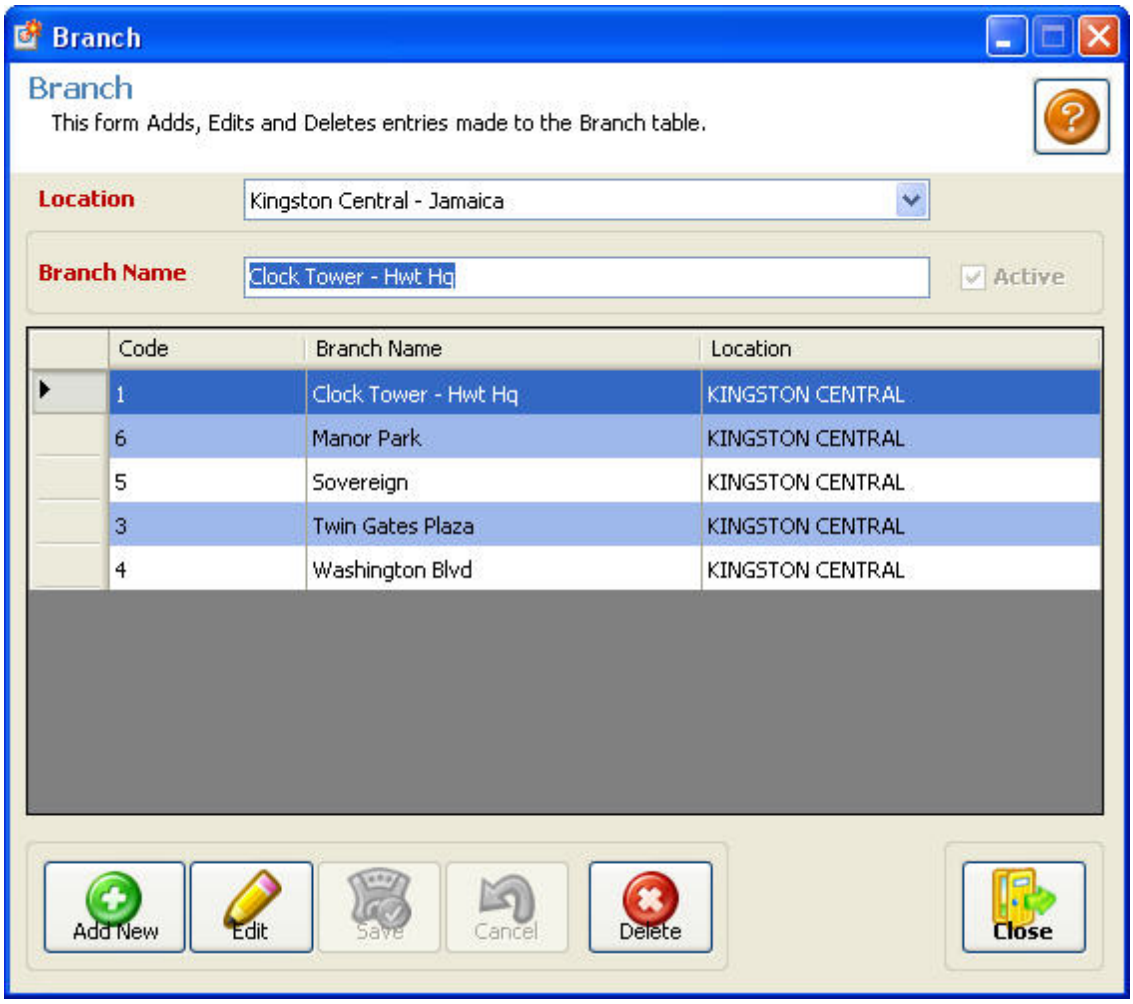
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.4.2.4 Branches

This form maintains a list location and specific Branch Location.

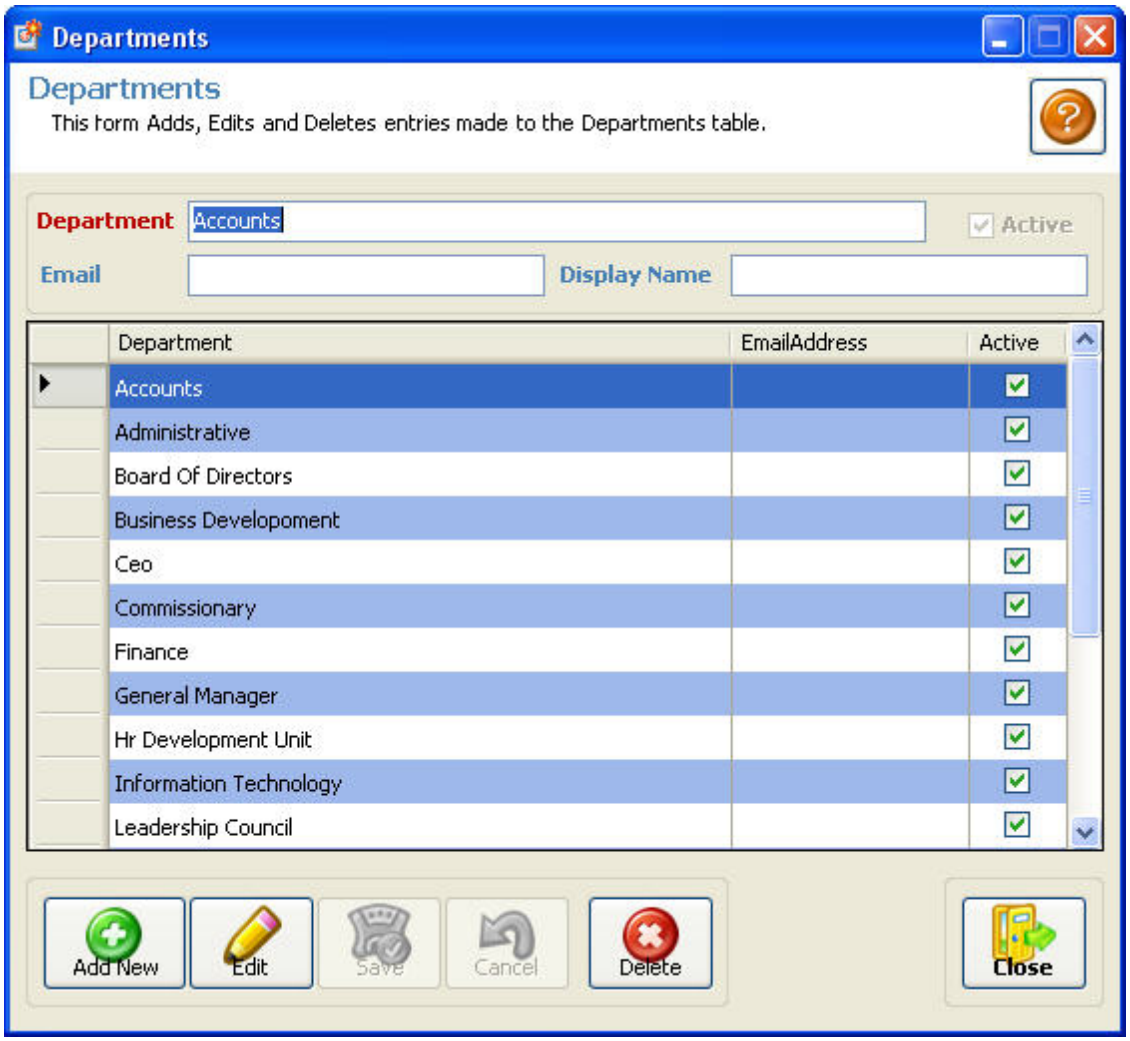
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.4.2.5 Departments

This form maintains a list of the different Departments within the company.

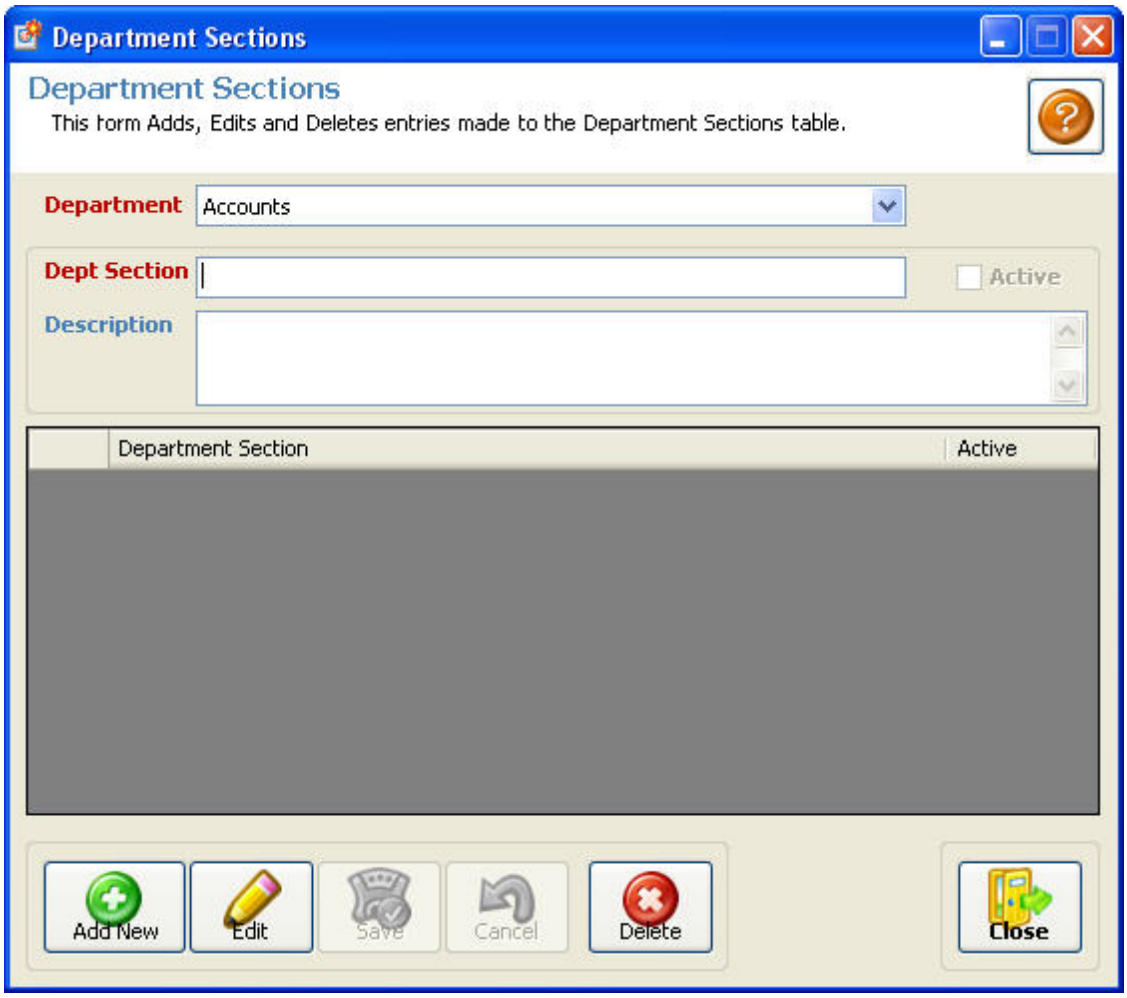
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.4.2.6 Department Sections

This form maintains of Departments within company and there description.

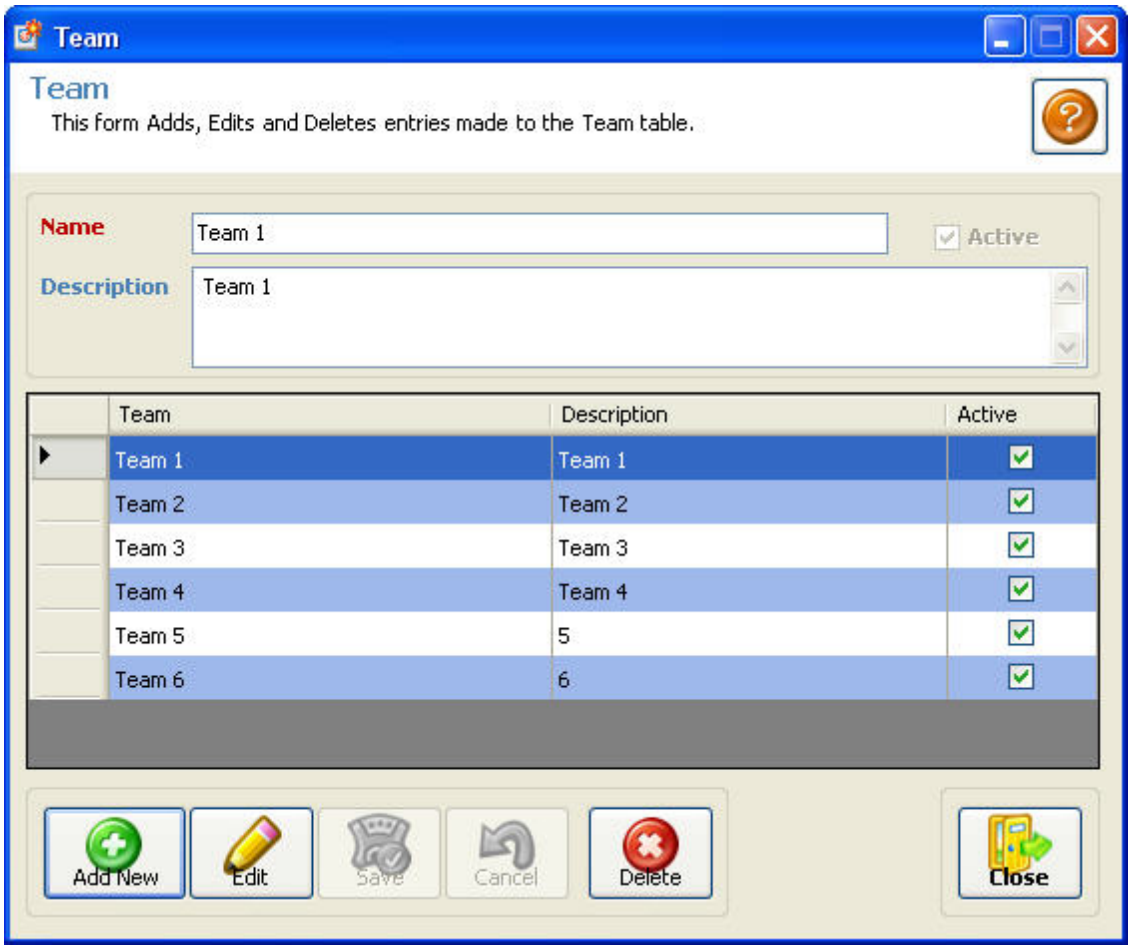
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.4.2.7 Team

This Form Maintains entries of different teams and there description.

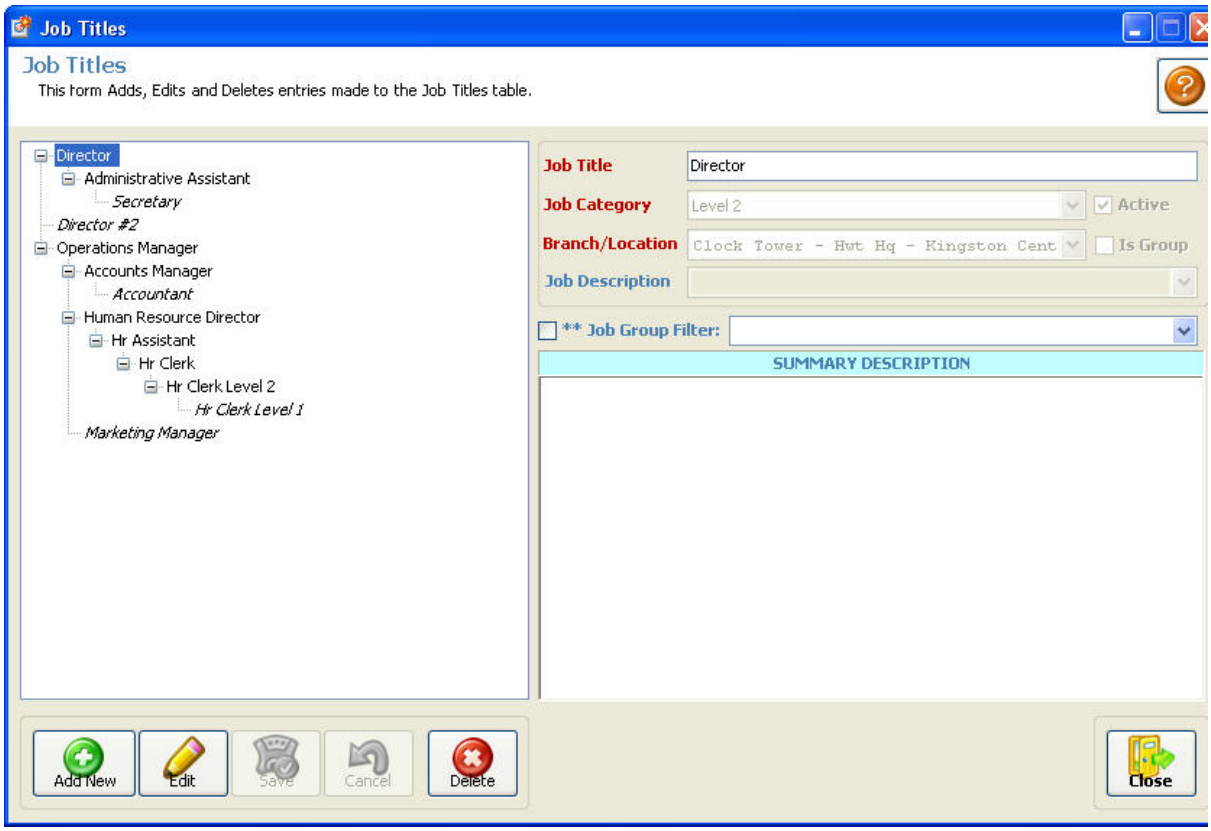
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.4.2.8 Job Titles

This form maintains a list of entries made to the Job Tile table.

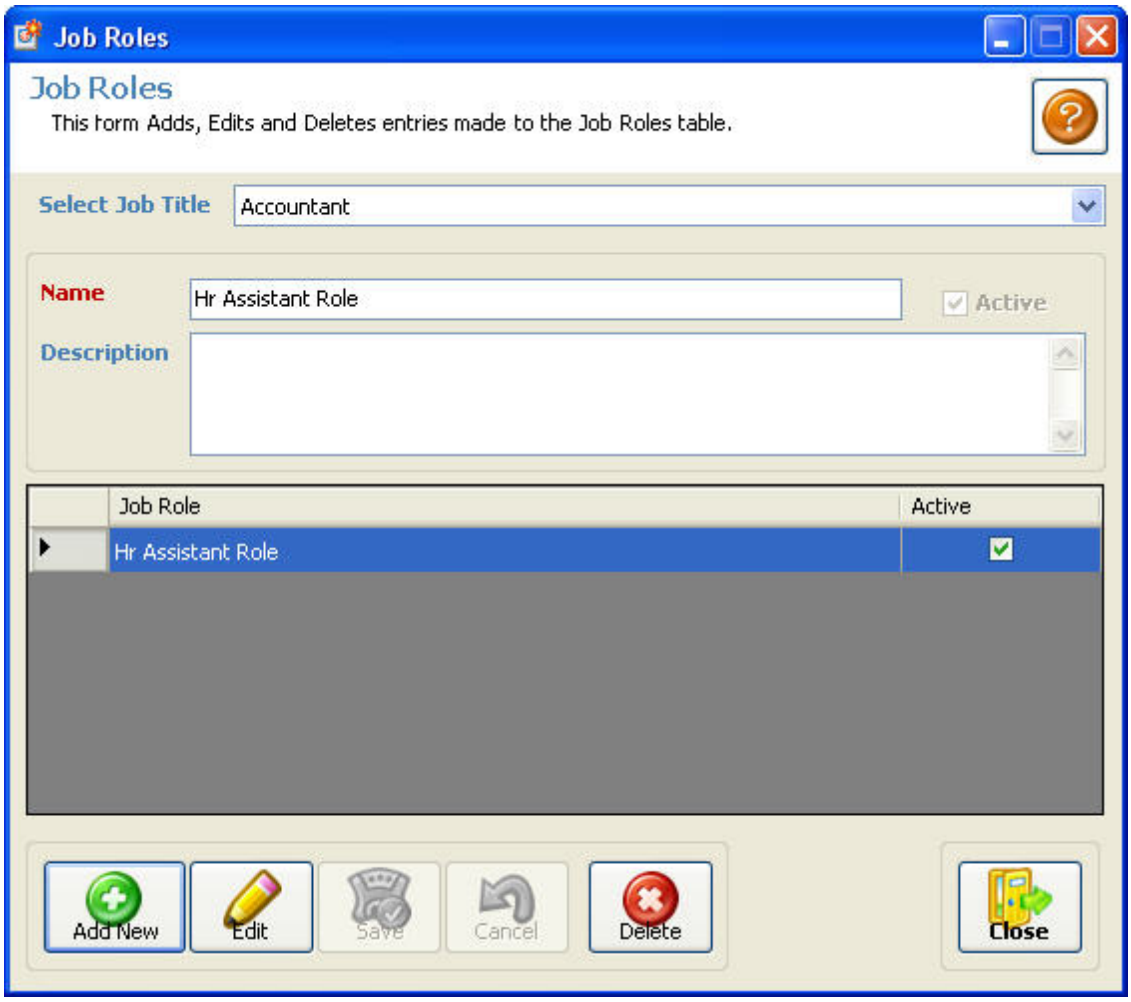
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.4.2.9 Job Roles

This form maintains a list of entries which entails the different Job Roles in a specific department.

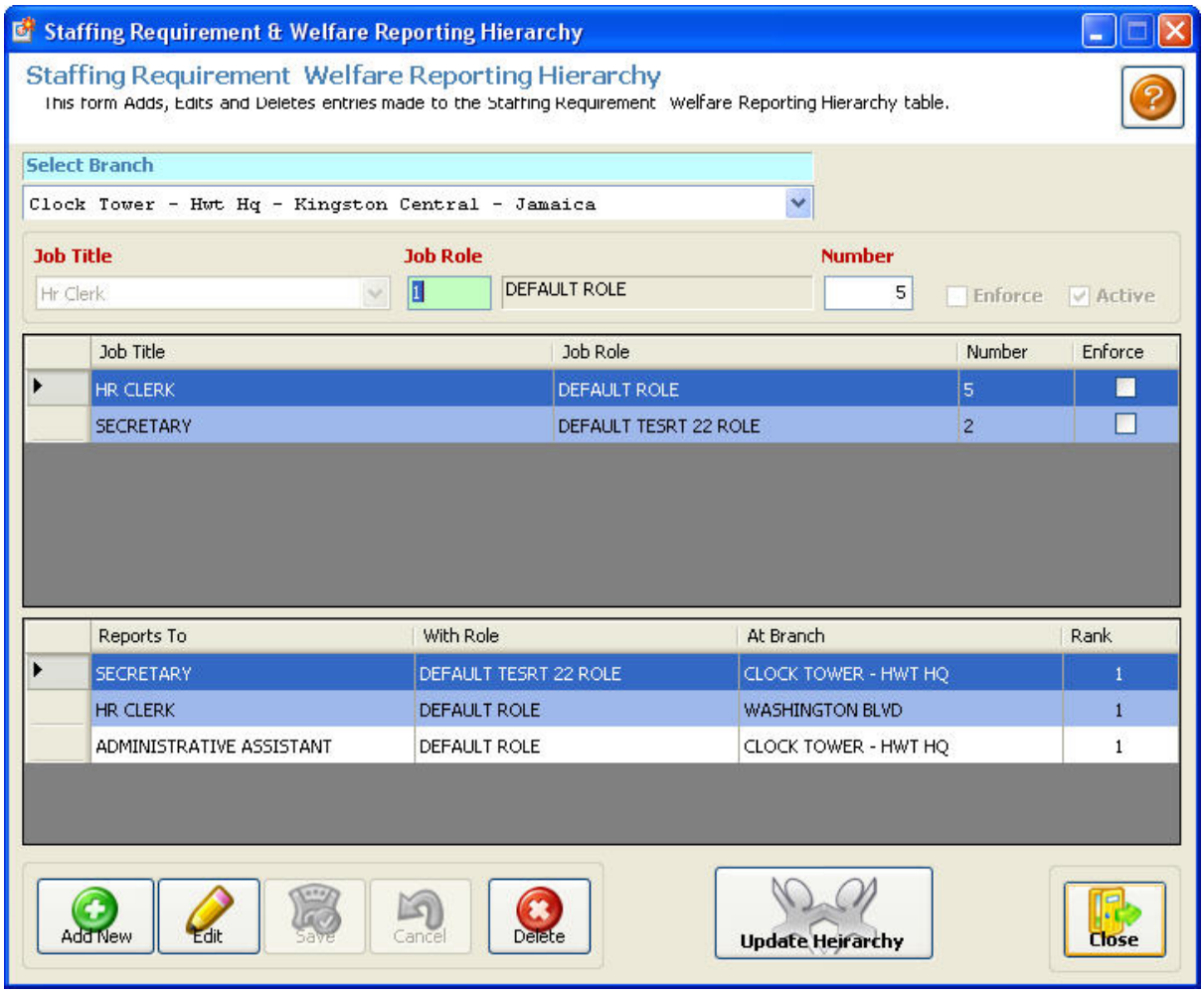
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.4.2.10 Staff Requirements

This form maintains entries made to the Staffing Requirement & Welfare Reporting Hierarchy table.

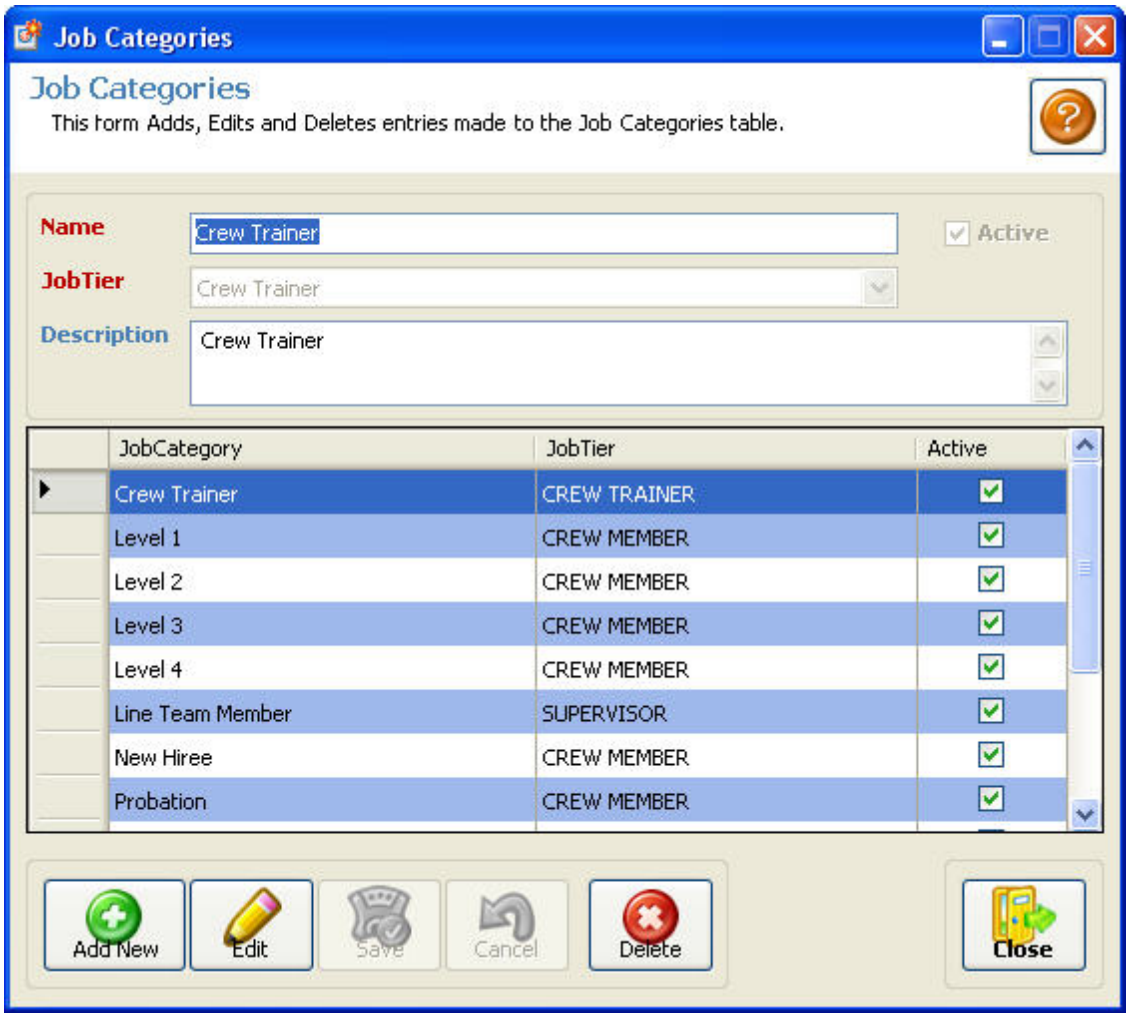
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.4.2.11 Job Category

This form allows for the maintenance of the list made to the Job Categories table.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

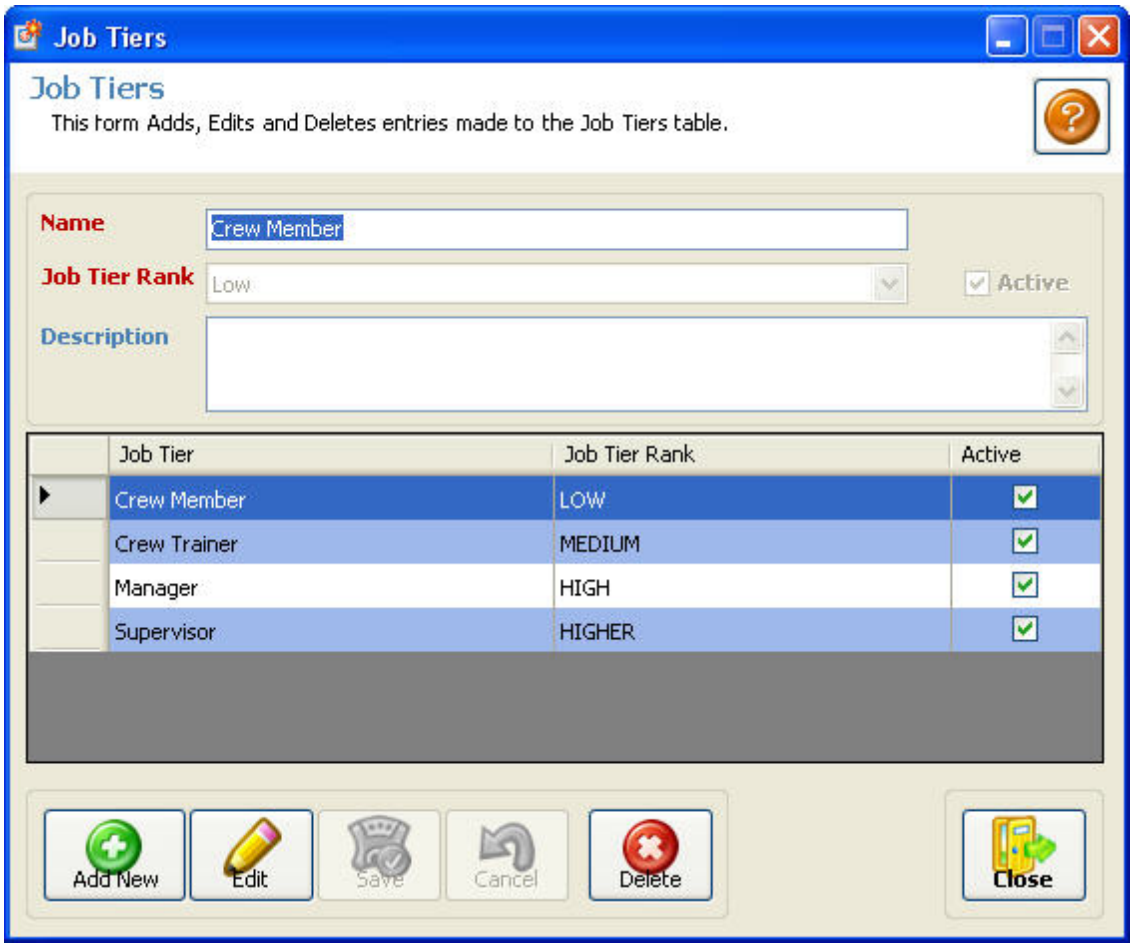


4.4.2.12 Job Tier

This form allows for the maintenance of the list job title and he different level which is issued.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

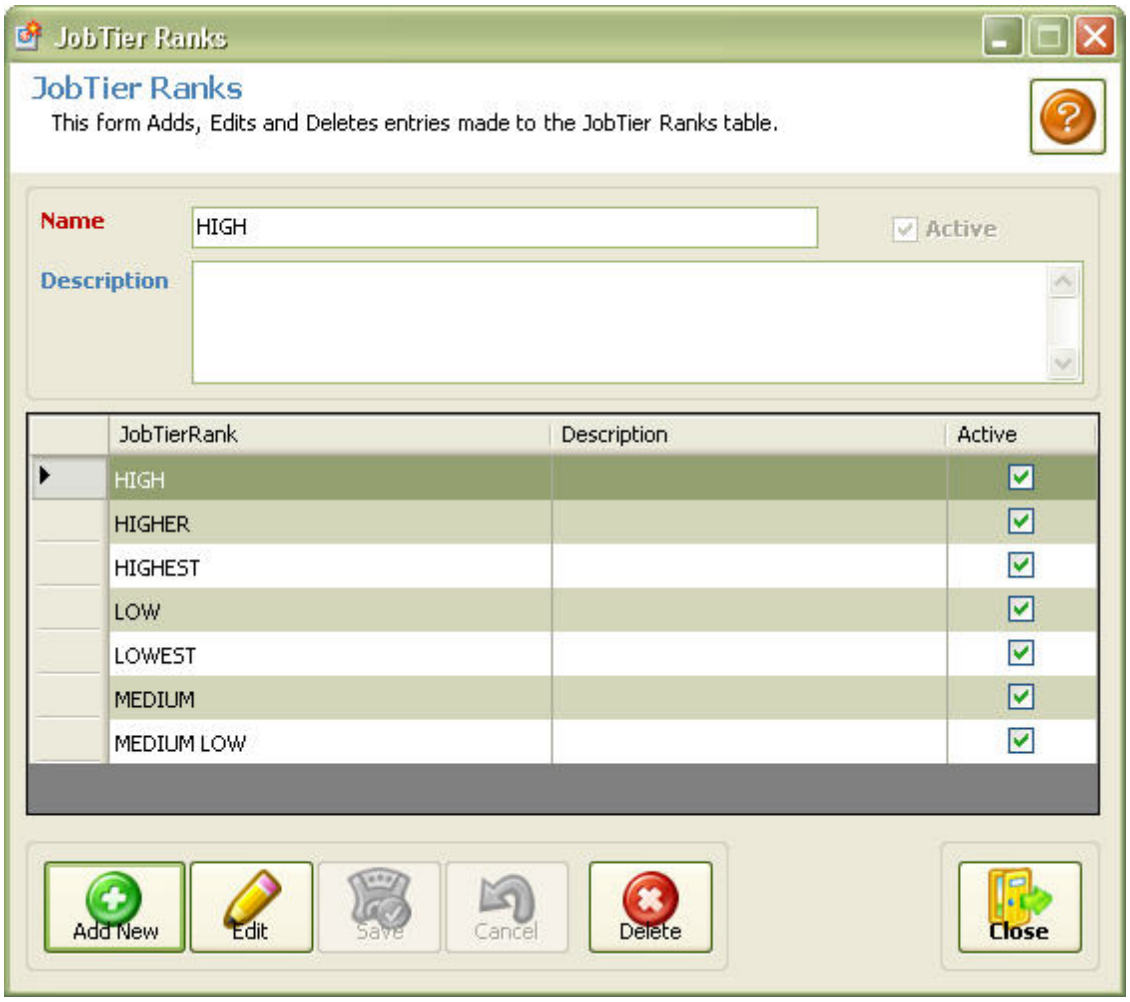
© 2014 Enter your company name



4.4.2.13 Job Tier Ranks

This form maintains list of entries of job levels and there description.

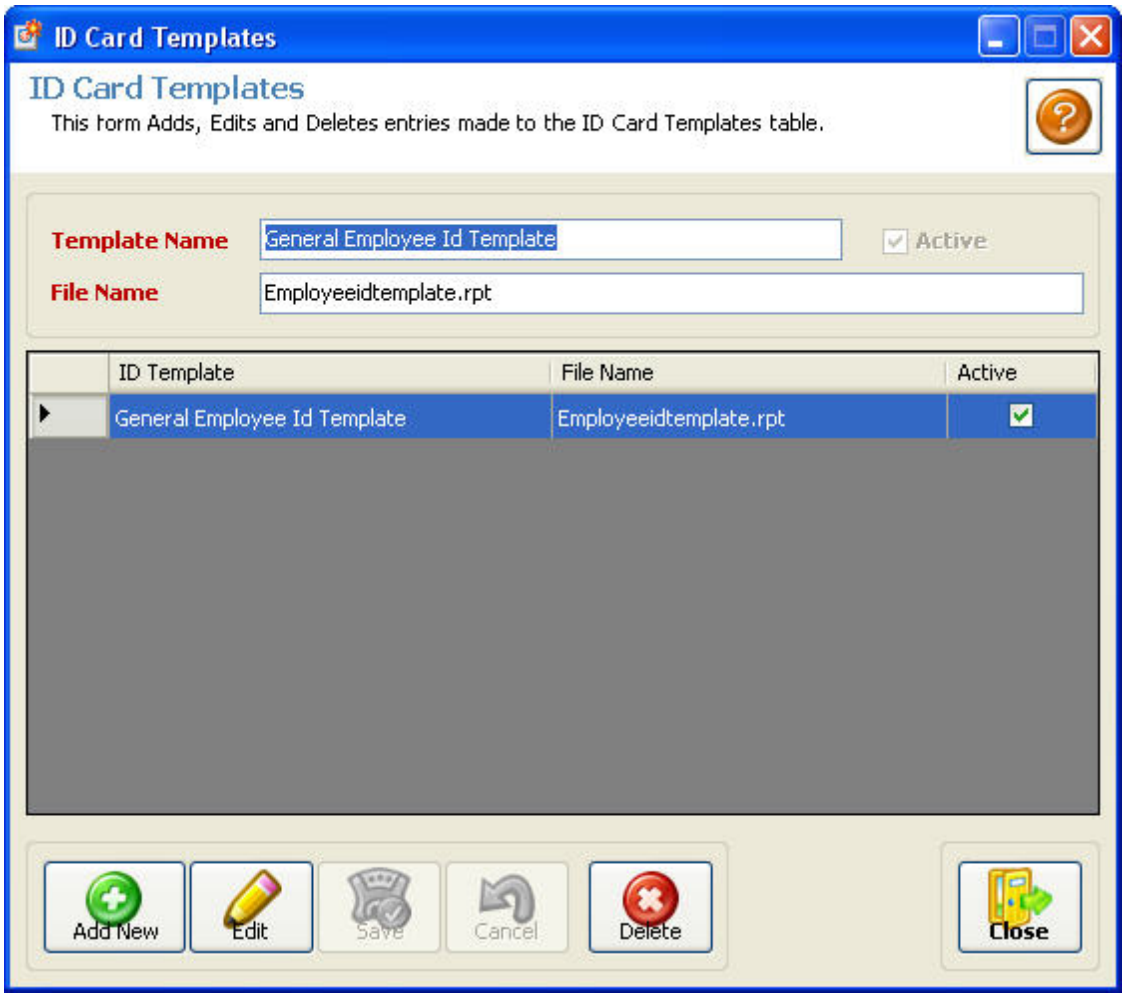
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.4.2.14 Employee ID Templates

This is to maintain entries made to the ID Card Templates designed and available for printing of laminated IDs for employees.

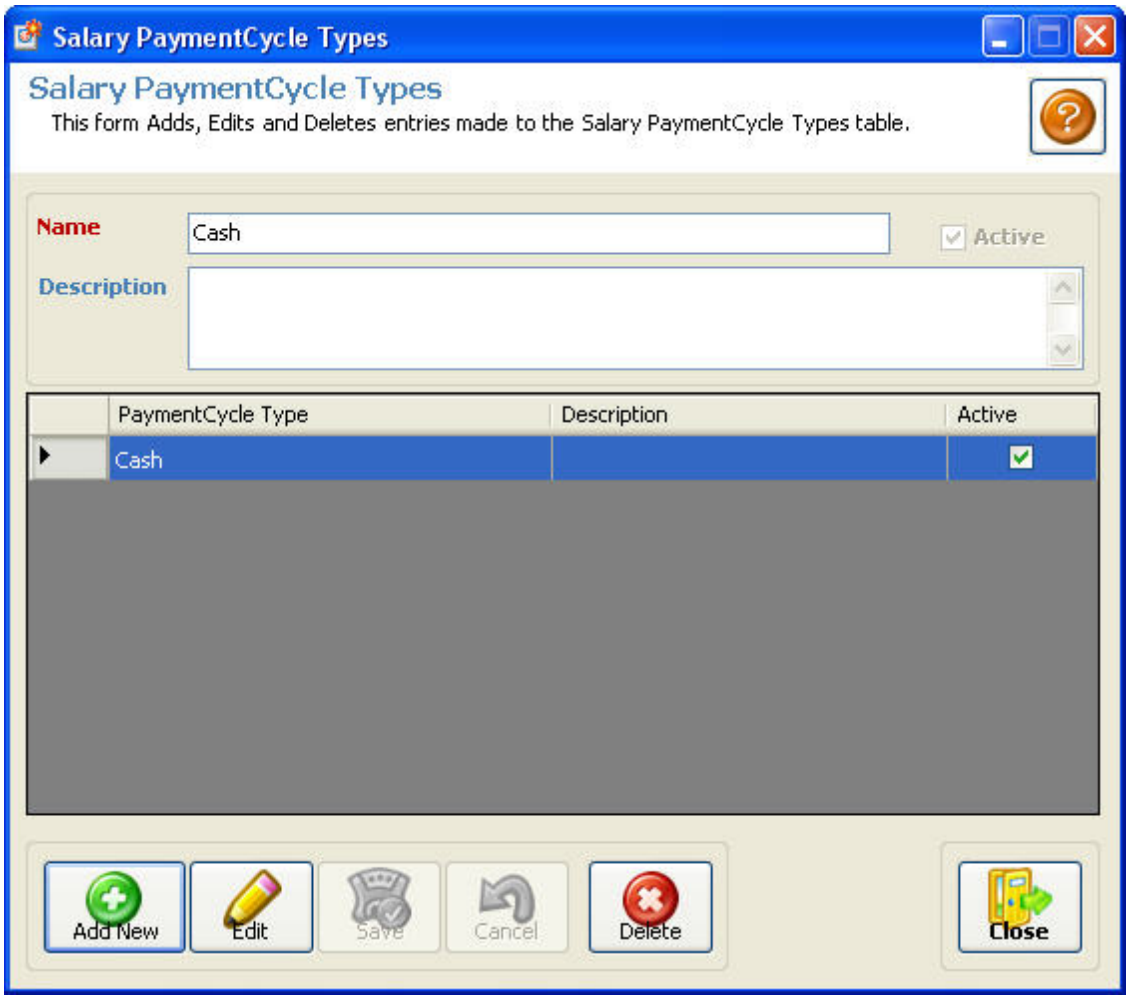
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



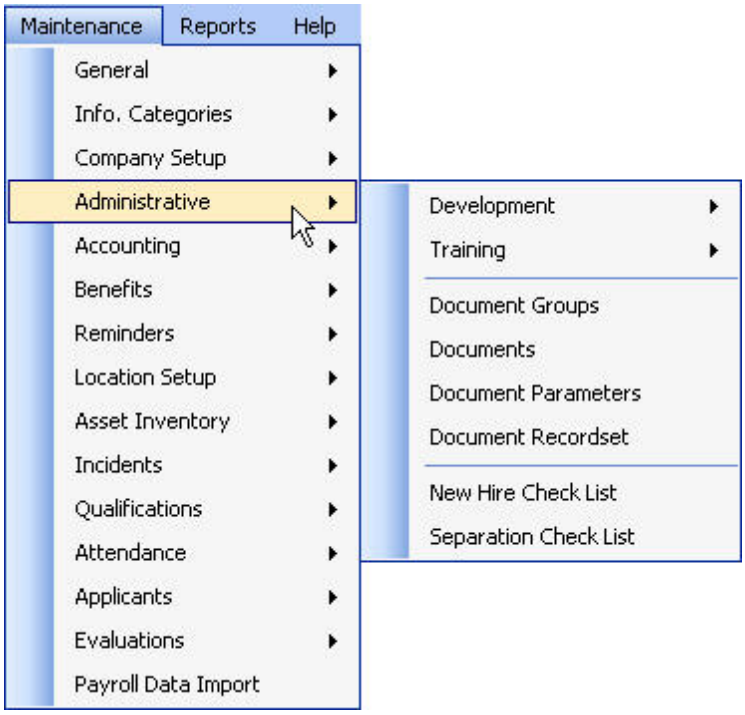
4.4.2.15 Salary Payments

This form maintain a list of entries of the different payment method and description.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!


Salary PaymentCycle Types
Salary PaymentCycle Types
This form Adds, Edits and Deletes entries made to the Salary PaymentCycle Types table.
Name
Cash
Active
Description
PaymentCycle Type
Description
Active
Cash
Add New
Edit
Save
Cancel
Delete
Close

4.4.3 Administrative



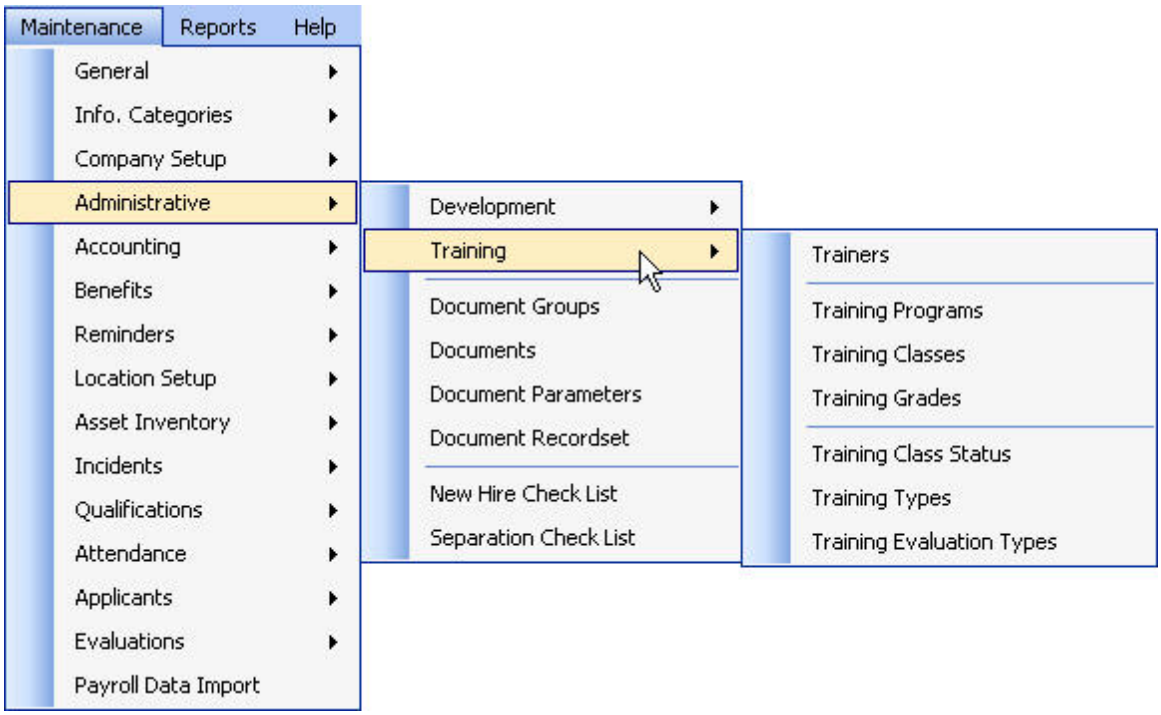
Related Topics:

Development
Training
Document Groups
Documents
Document Parameters
Document Records
New Hire Checklist
Separation Checklist

4.4.3.1 Training

In this section of the Maintenance menu, all training related data is setup here.

© 2014 Enter your company name



Related Topics

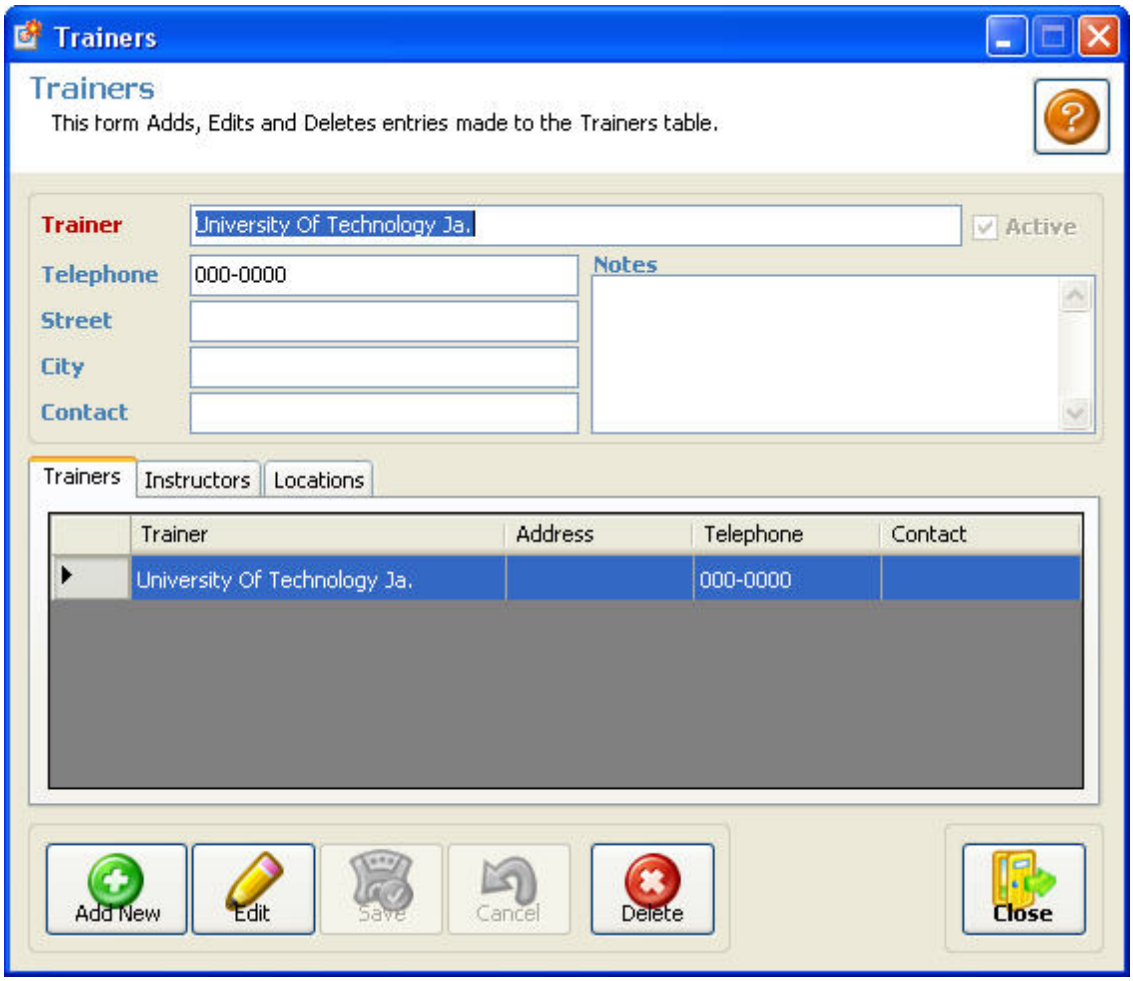
Trainers
Training Programs
Training Classes
Training Grades
Training Class Status
Training Types
Training Evaluation Types

4.4.3.1.1 Trainers

This is to maintain entries of contact information of person's or companies that offer training. Training maybe external or internal. Also enter the Instructors and Training locations.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

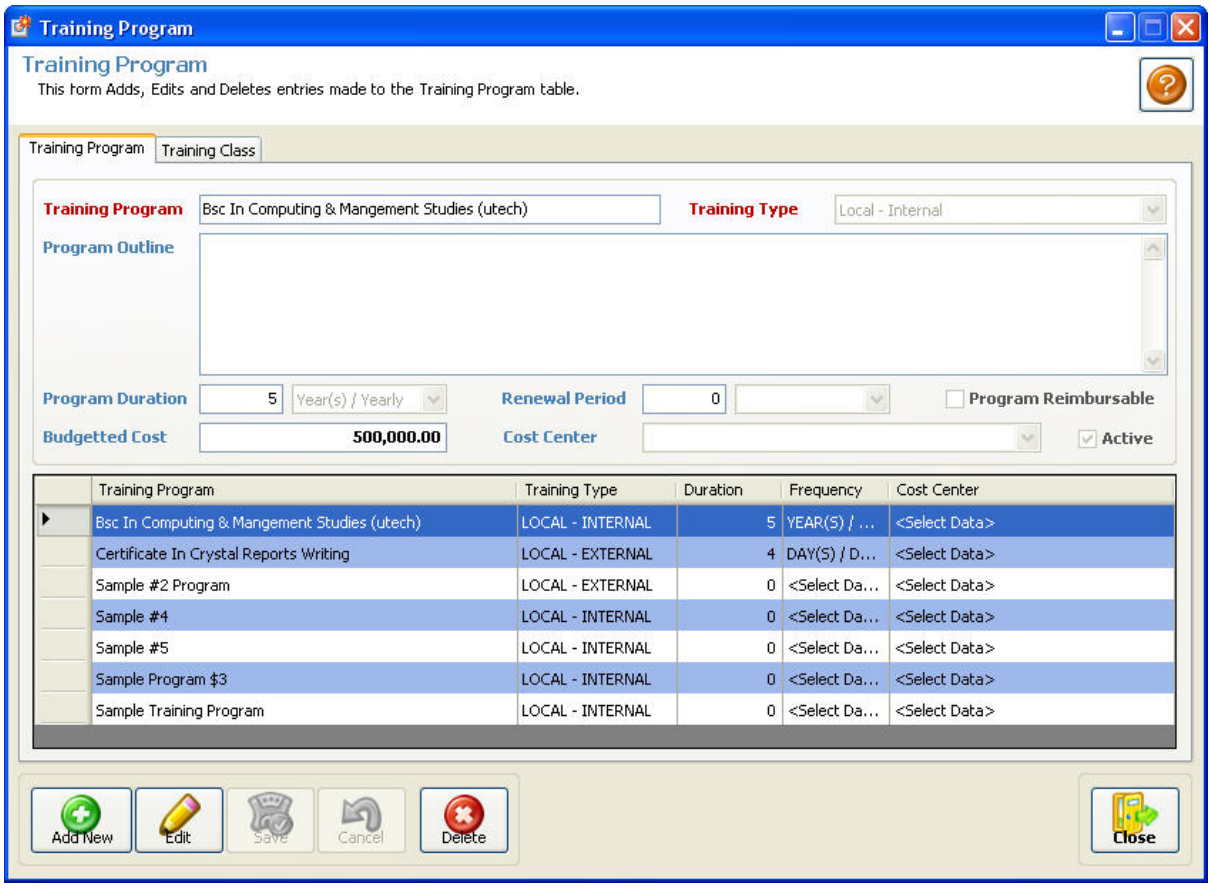
© 2014 Enter your company name



4.4.3.1.2 Training Programs

Training programs contain a list of all programs ever offered by the company. A training program should only be entered once and can there after scheduled multiple times when courses are held. Each training program should ideally have at least one class matching the name of the training program.

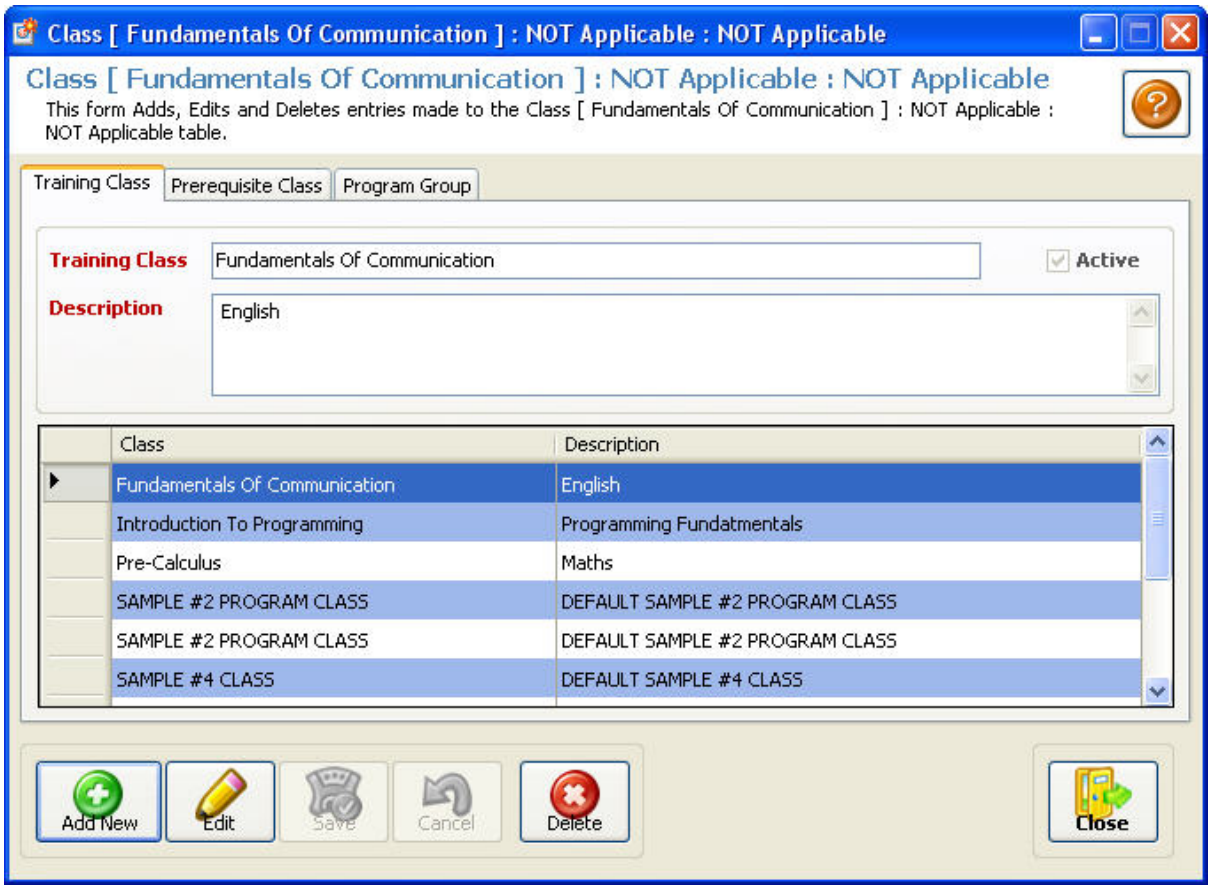
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.4.3.1.3 Training Classes

This is to maintain a list of classes or courses that a training program may consists of. Each training program should ideally have at least one class matching the name of the training program.

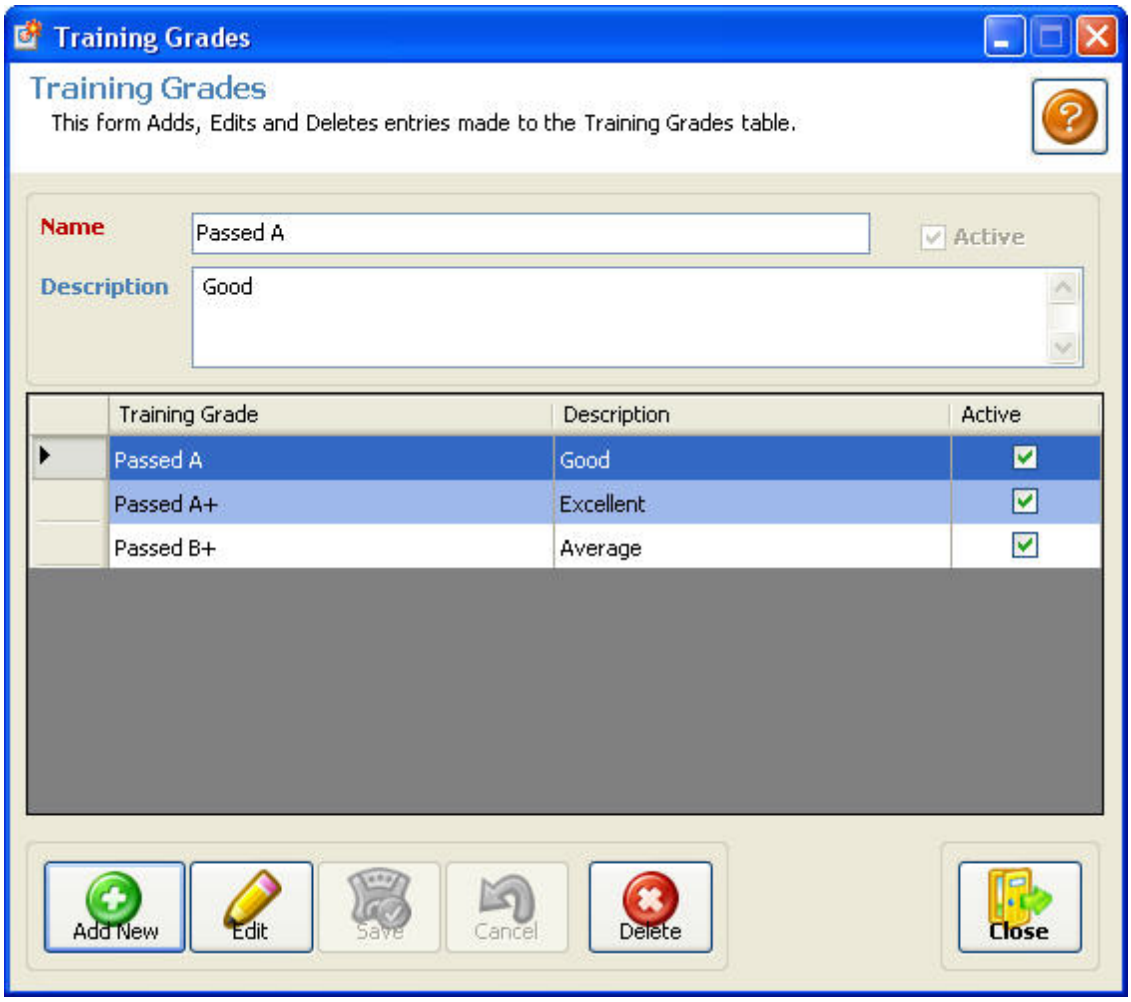
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.4.3.1.4 Training Grades

Training Grades is a list of evaluation criteria used to assess on a broad scale the employee's performance in training. When employees are enrolled, after training this evaluation can be set.

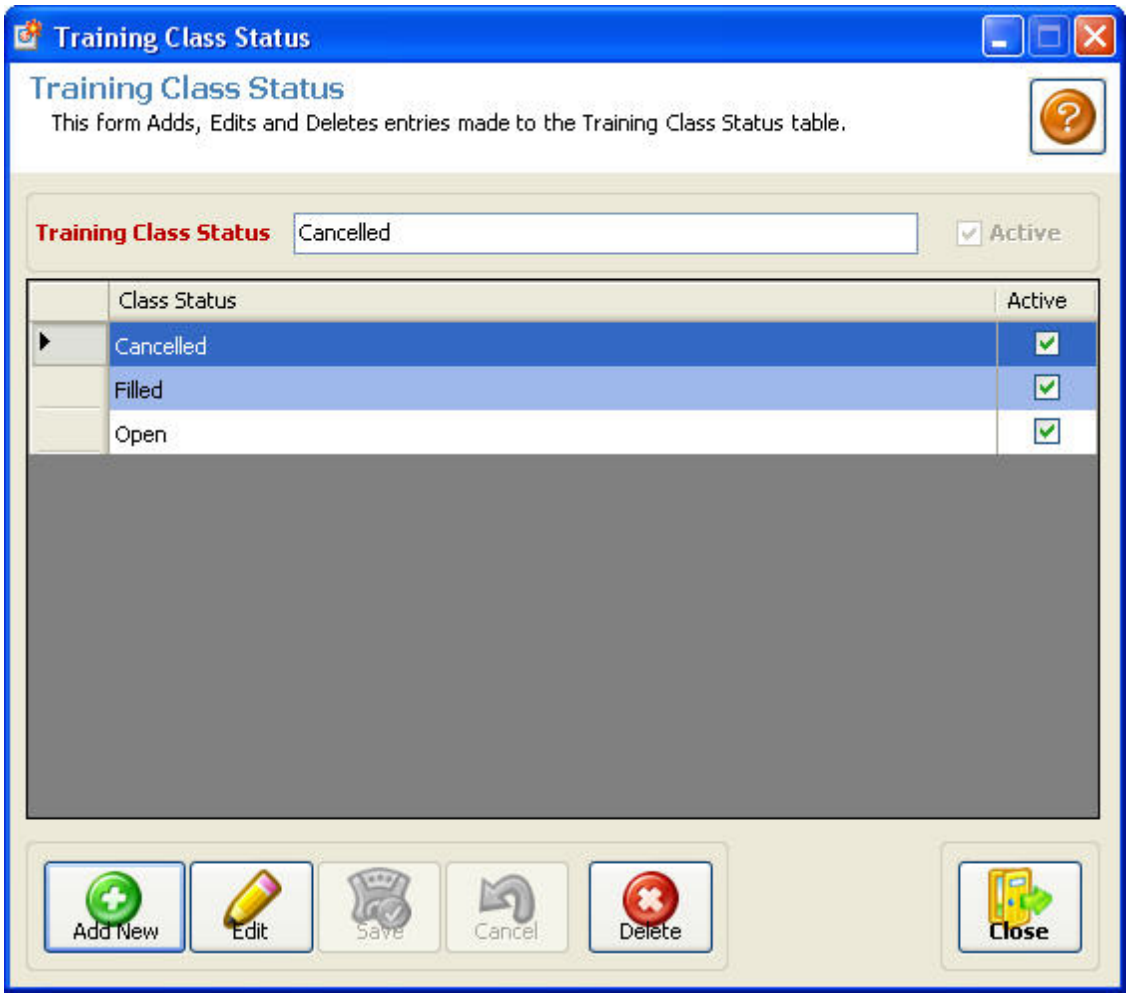
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.4.3.1.5 Training Class status

This is to maintain entries of Training class Status. Class status is needed when enrolling trainings or doing their evaluations.

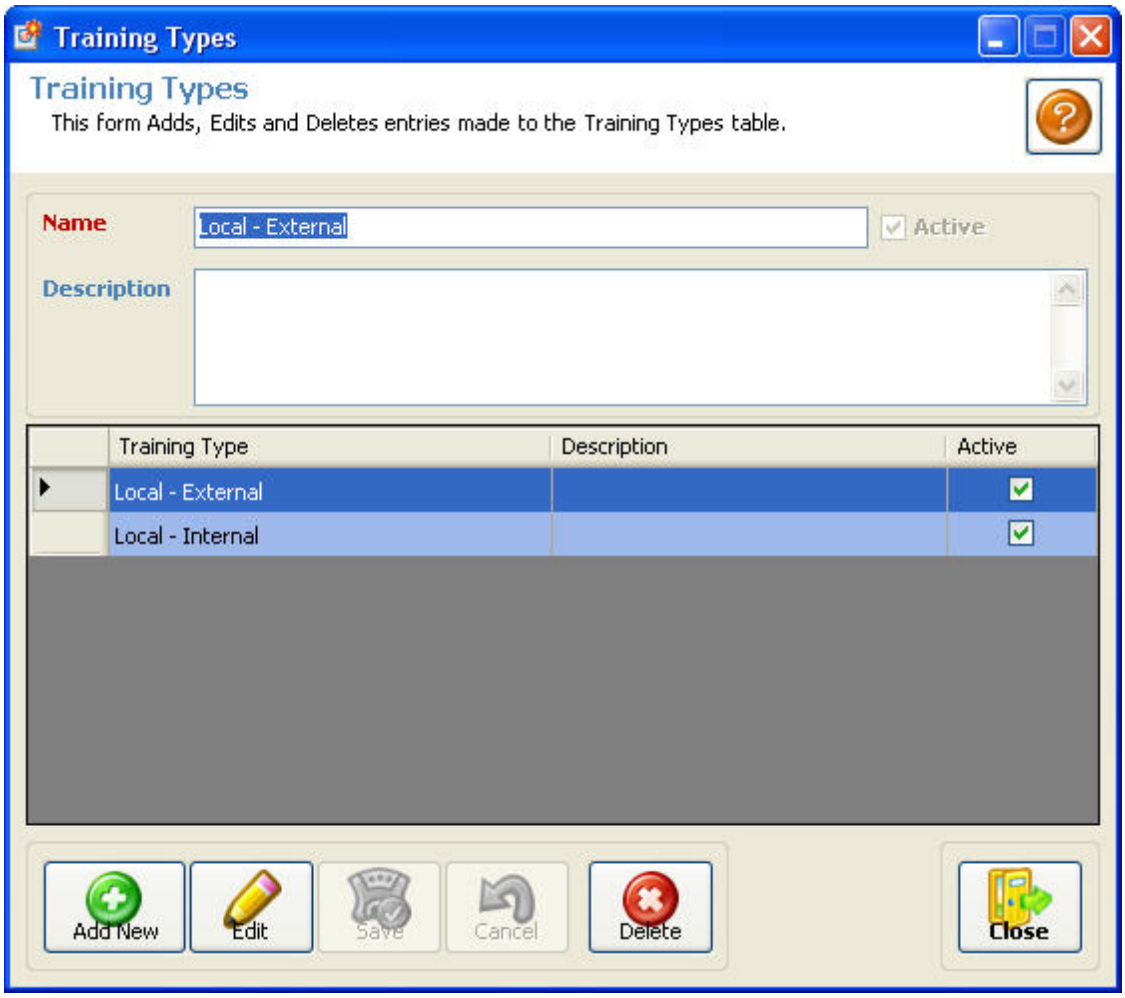
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.4.3.1.6 Training Types

This is to maintain entries made to the training Types Table indicating type of training employee received.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

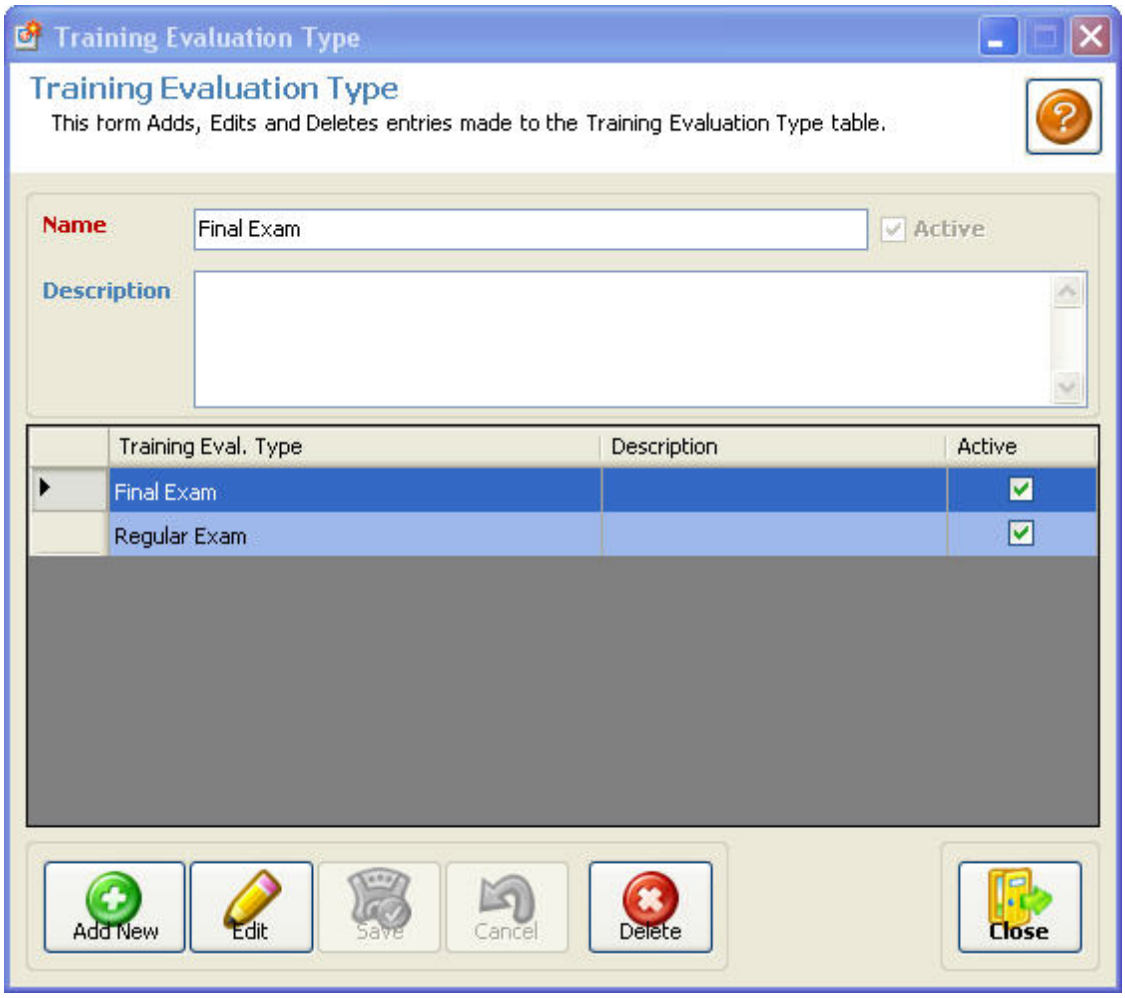


4.4.3.1.7 Training Evaluation Type

This is to maintain entries made to the Training Evaluation Types. The type of evaluation is determined by the nature of the course itself.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

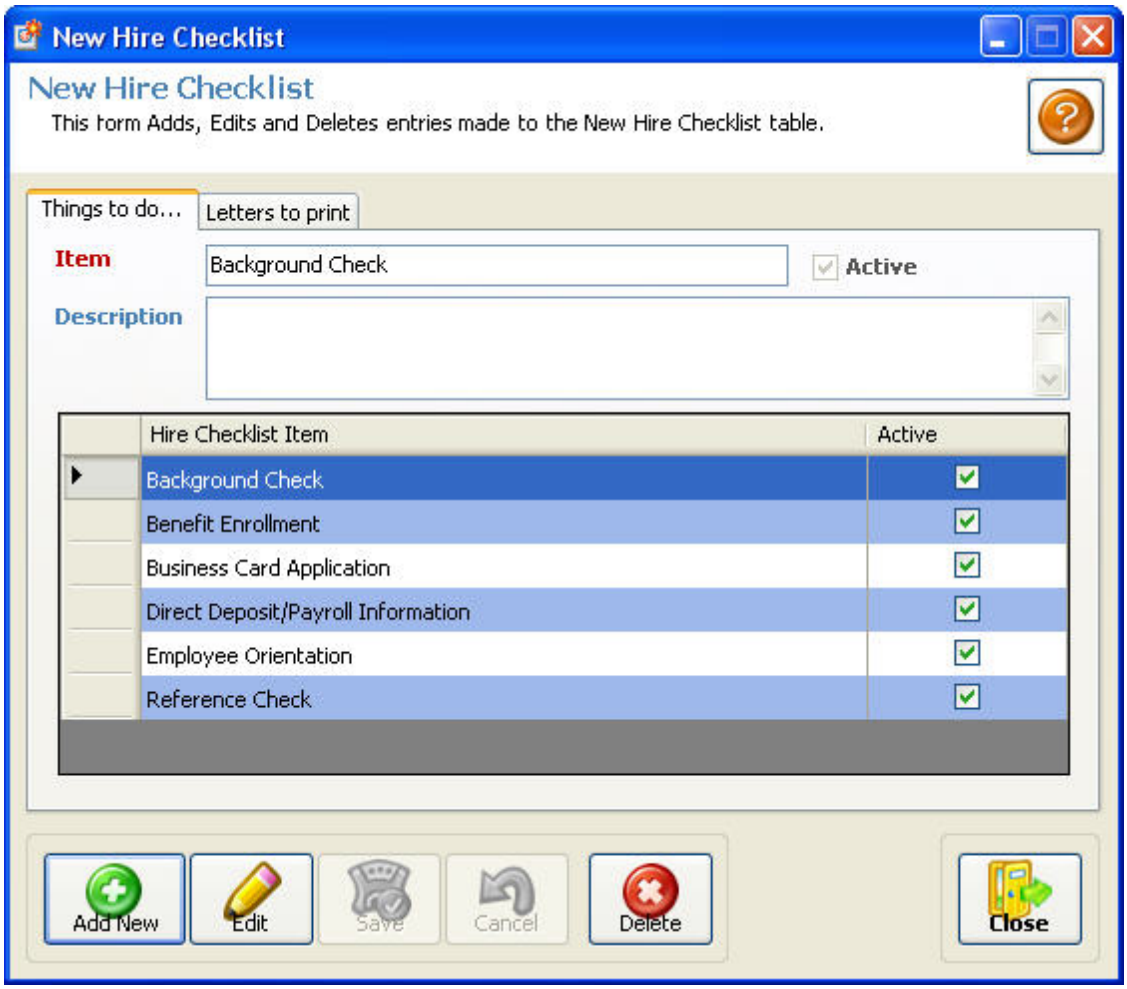
© 2014 Enter your company name



4.4.3.2 New Hire Checklist

This form maintains a list of entries made to the New Hire Checklist table.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



See Add Edit and Delete to learn how to enter information in this screen

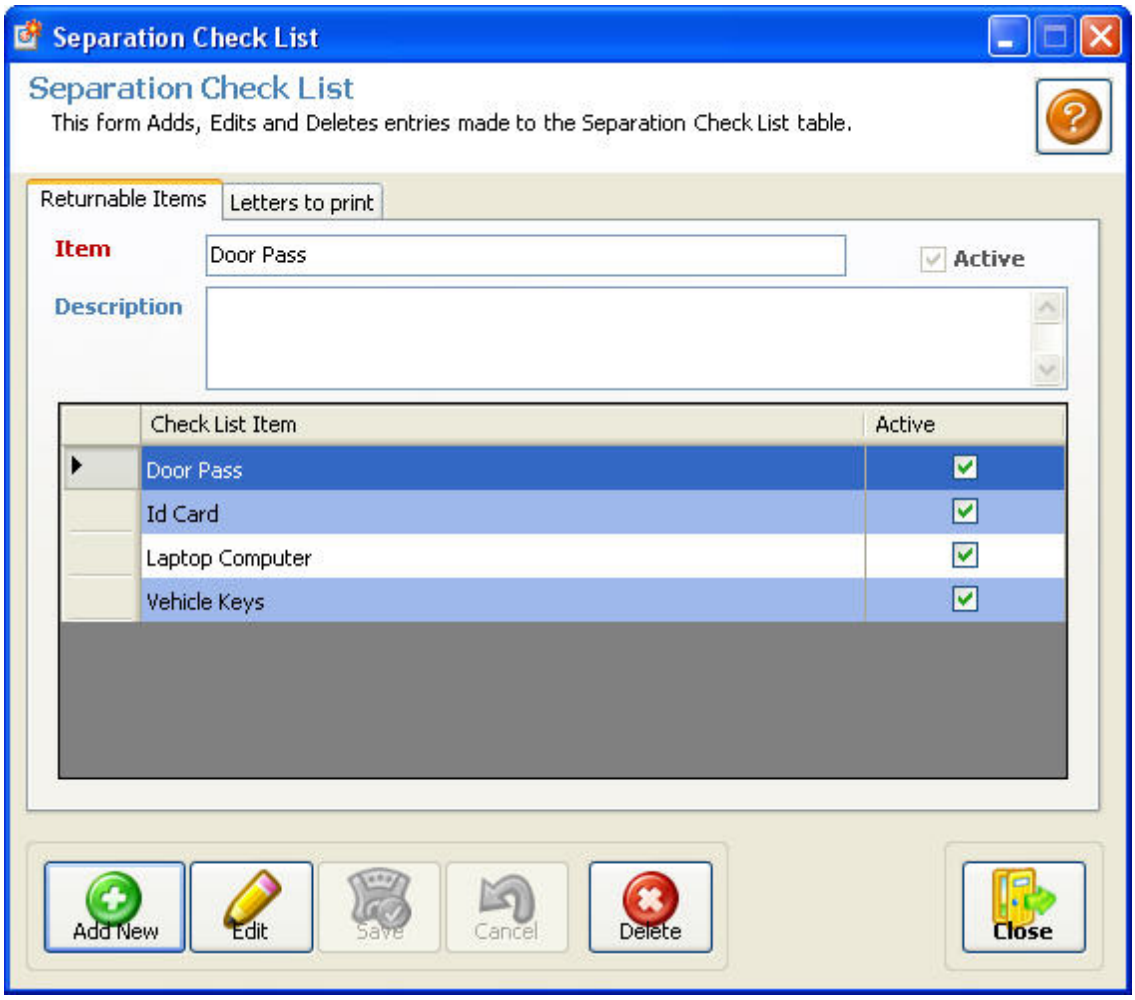
Remember to Save Cancel or Close when done!!

4.4.3.3 Separation Checklist

This form maintains a list of entries made to the Separation Check List table.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

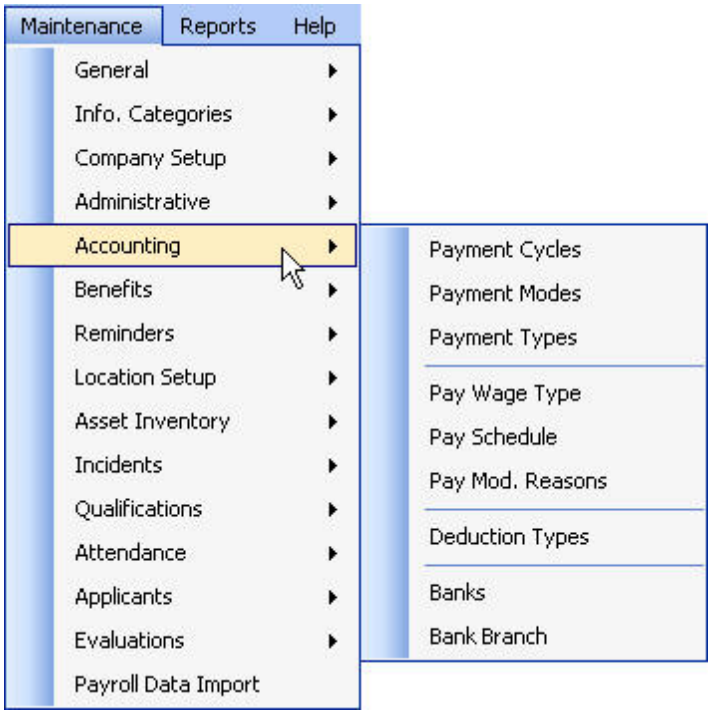
© 2014 Enter your company name



See Add Edit and Delete to learn how to enter information in this screen

Remember to Save Cancel or Close when done!!

4.4.4 Accounting



Related Topics:

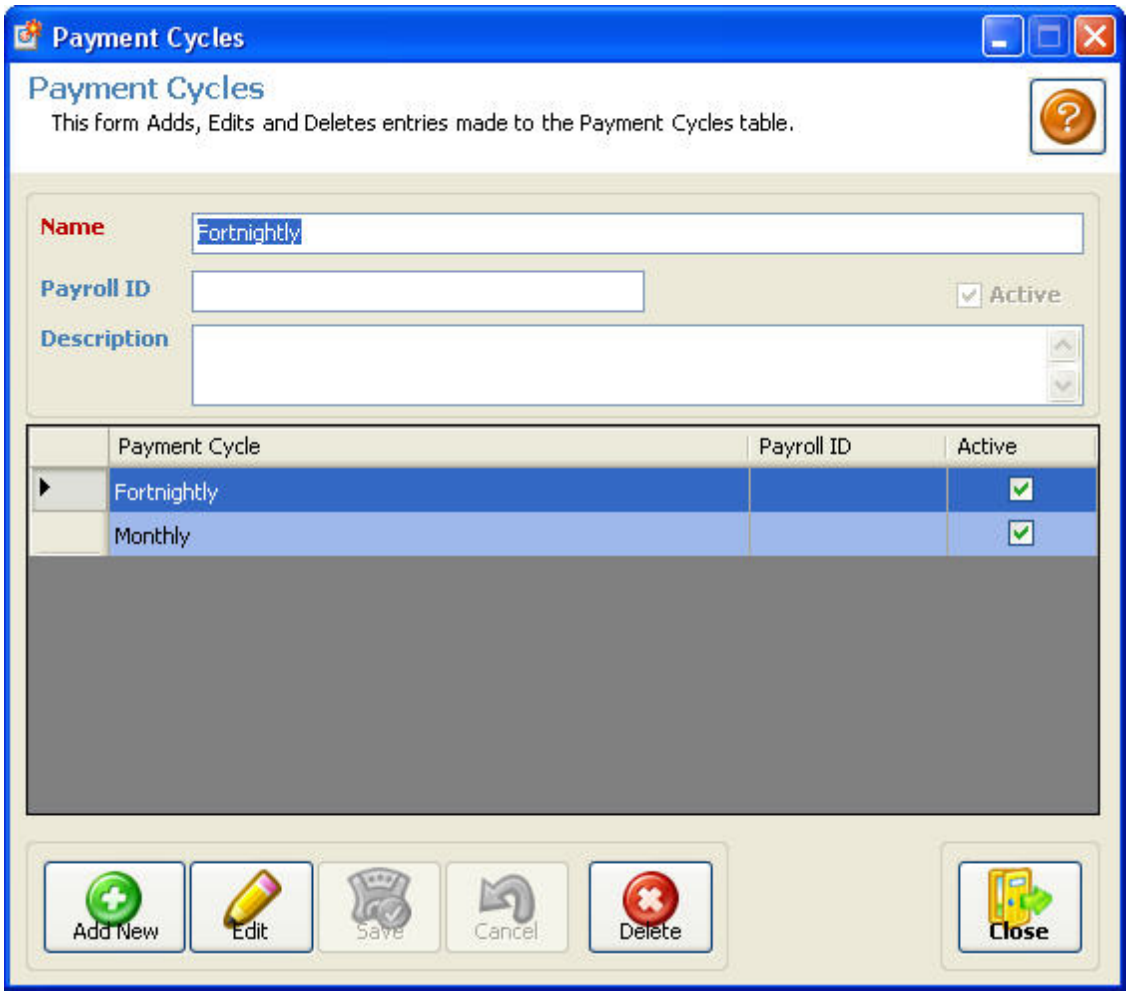
Payment Cycles
Payment Modes
Payment Types
Pay Wage Types
Pay Schedule
Pay Mod. Reasons
Deduction Types
Banks
Bank Branch

4.4.4.1 Payment Cycles

This form maintains a list of entries indicating the different payment periods.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

© 2014 Enter your company name



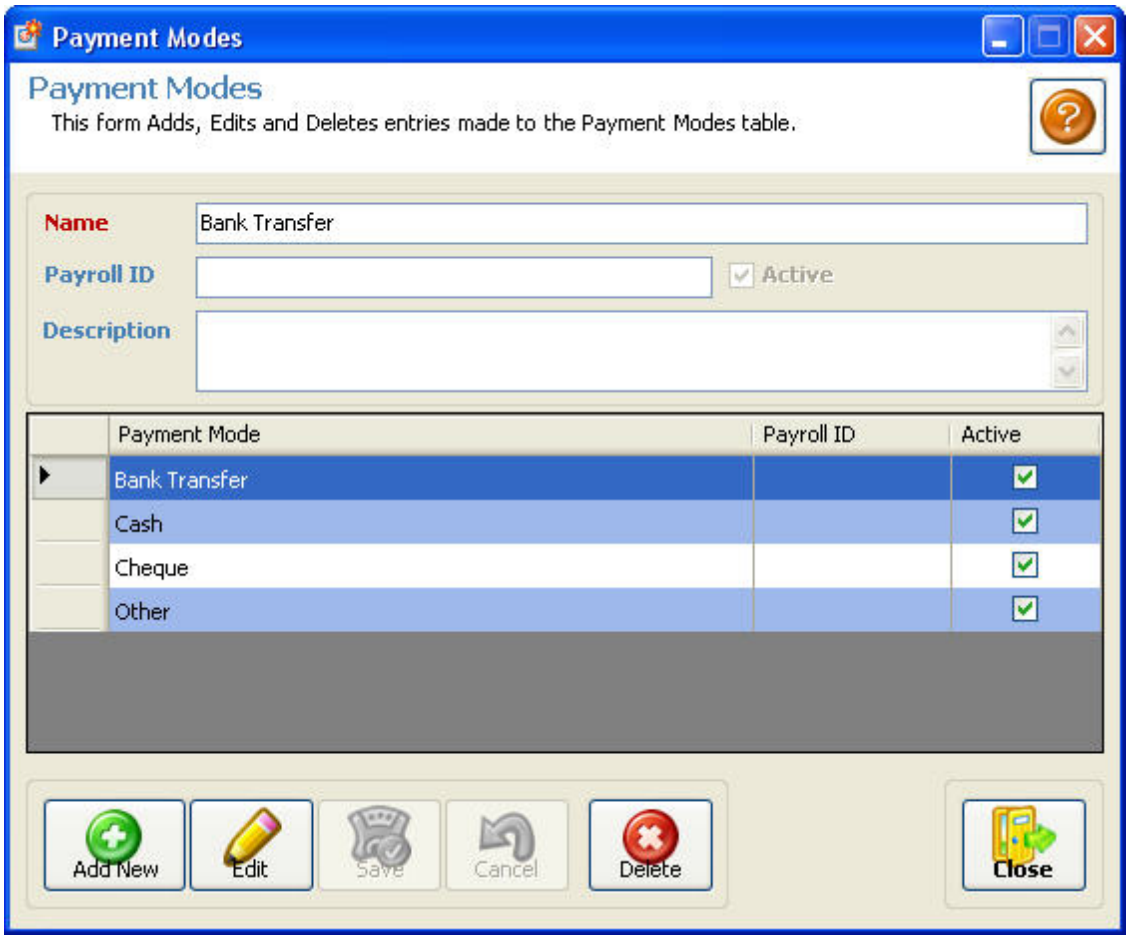
See Add Edit and Delete to learn how to enter information in this screen

Remember to Save Cancel or Close when done!!

4.4.4.2 Payment Modes

This form maintains a list of entries indicating different payment methods.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



See Add Edit and Delete to learn how to enter information in this screen

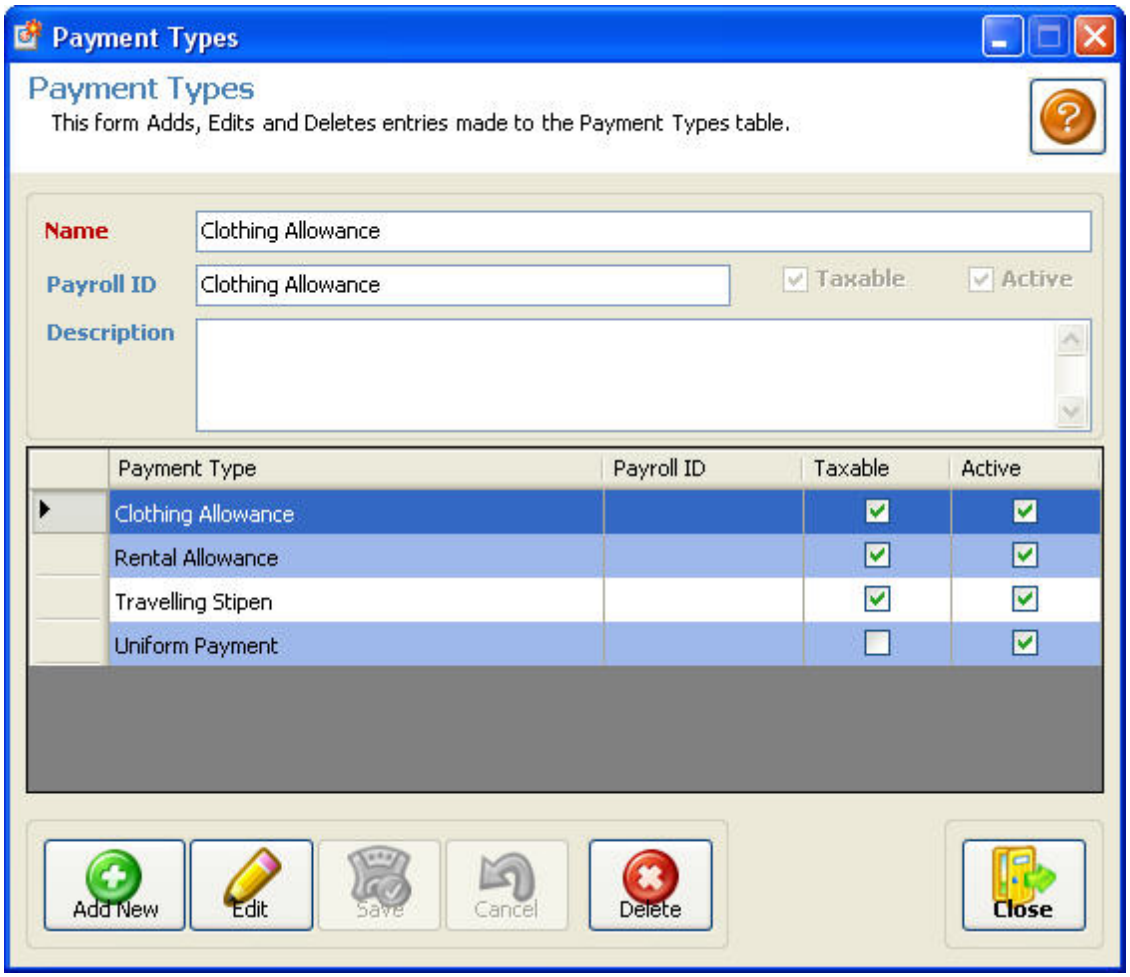
Remember to Save Cancel or Close when done!!

4.4.4.3 Payment Types

This form maintains a list of entries indicating payment categories / reasons.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

© 2014 Enter your company name



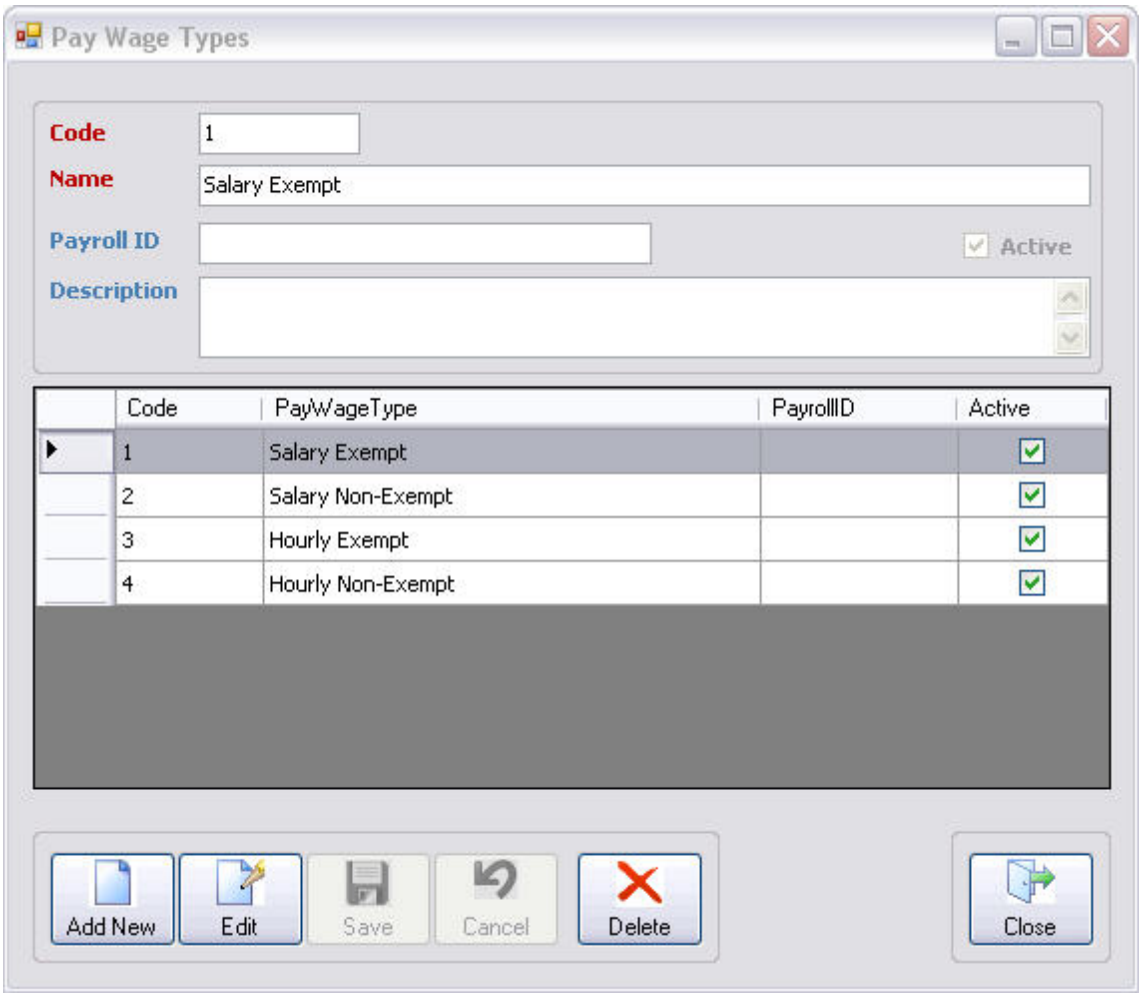
See Add Edit and Delete to learn how to enter information in this screen

Remember to Save Cancel or Close when done!!

4.4.4.4 Pay Wage Type

This form maintains a list of entries made to the Pay Wage Types table.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



See Add Edit and Delete to learn how to enter information in this screen

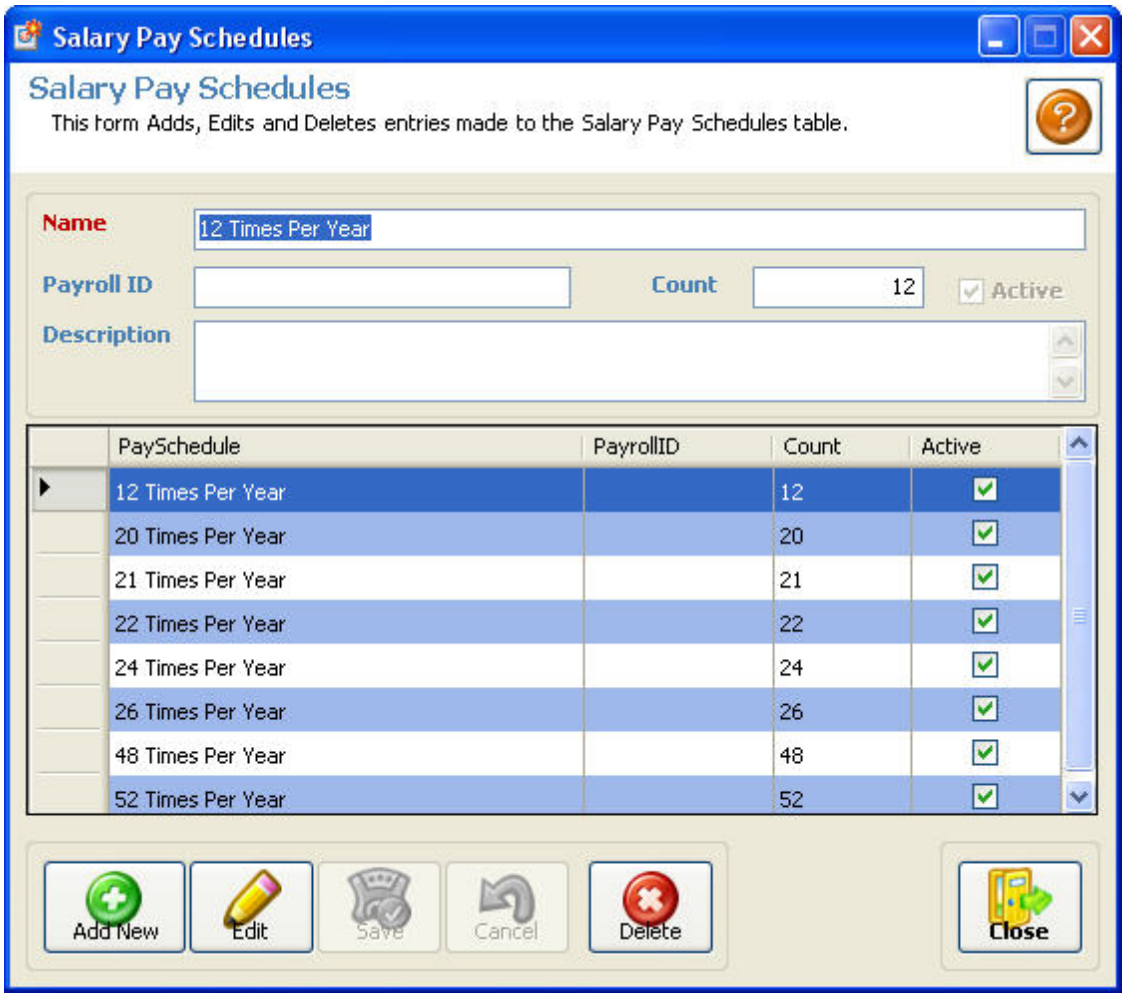
Remember to Save Cancel or Close when done!!

4.4.4.5 Pay Schedule

This form maintains a list of entries made to the Salary Pay Schedules able indicating now often payment is made over a period of time.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

© 2014 Enter your company name



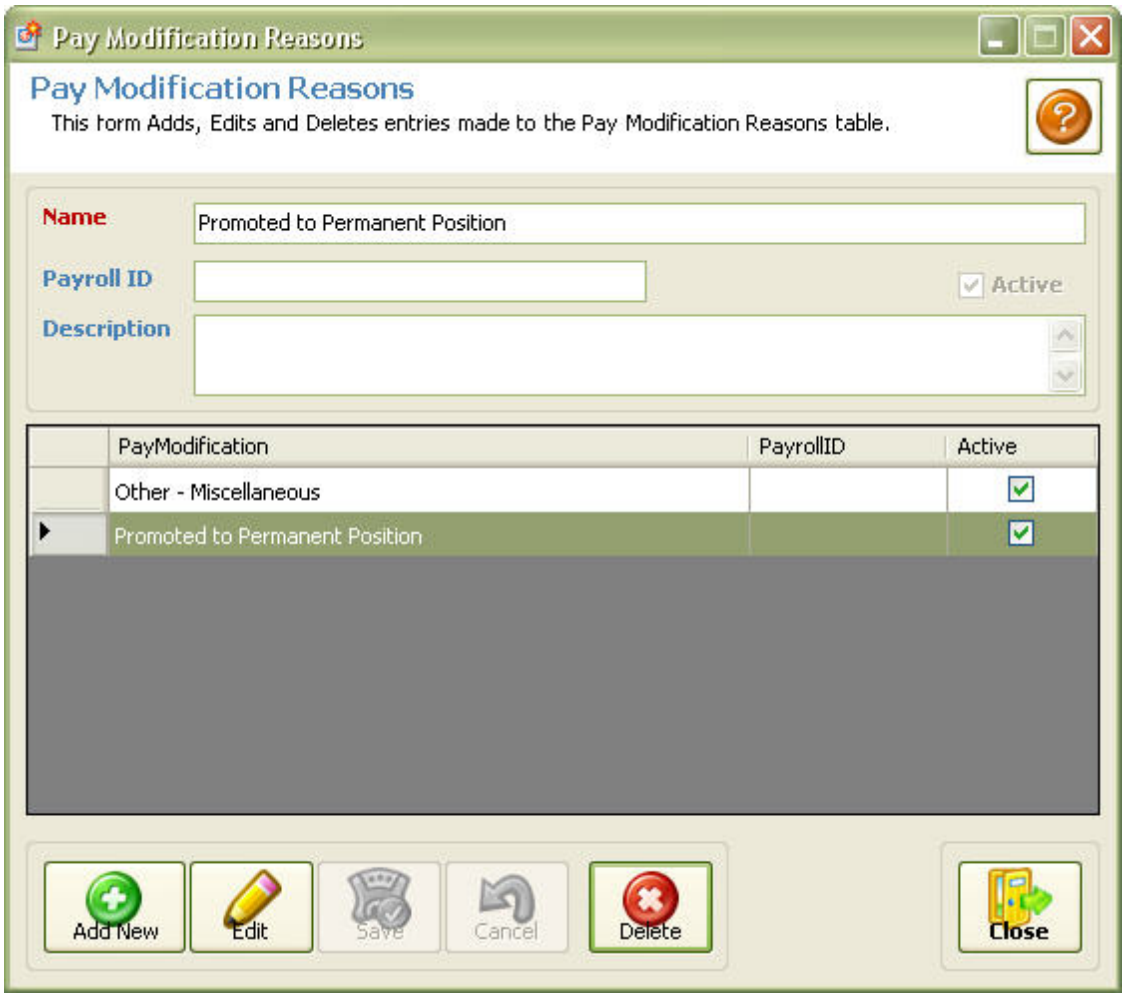
See Add Edit and Delete to learn how to enter information in this screen

Remember to Save Cancel or Close when done!!

4.4.4.6 Pay Modification Reasons

This form maintains a list of entries made to the Payment Modification Reasons table.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



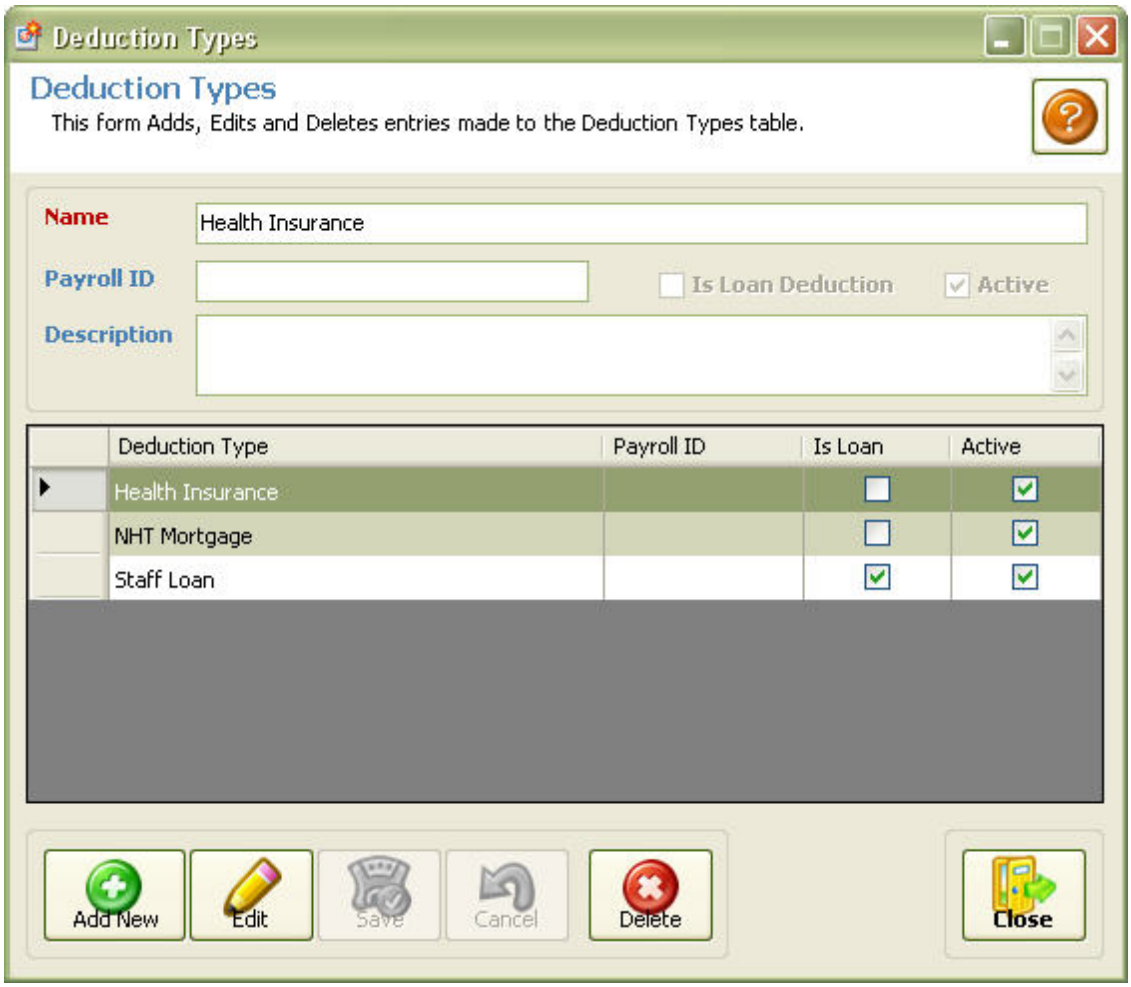
See Add Edit and Delete to learn how to enter information in this screen

Remember to Save Cancel or Close when done!!

4.4.4.7 Deduction Types

This form maintains a list of entries made to the deduction type table showing the different categories which deduction from salary go towards.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



See Add Edit and Delete to learn how to enter information in this screen

Remember to Save Cancel or Close when done!!

4.4.4.8 Banks

This form maintains a list of entries make to the Banks table showing the different Financial institute the company do business with.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

© 2014 Enter your company name

See Add Edit and Delete to learn how to enter information in this screen

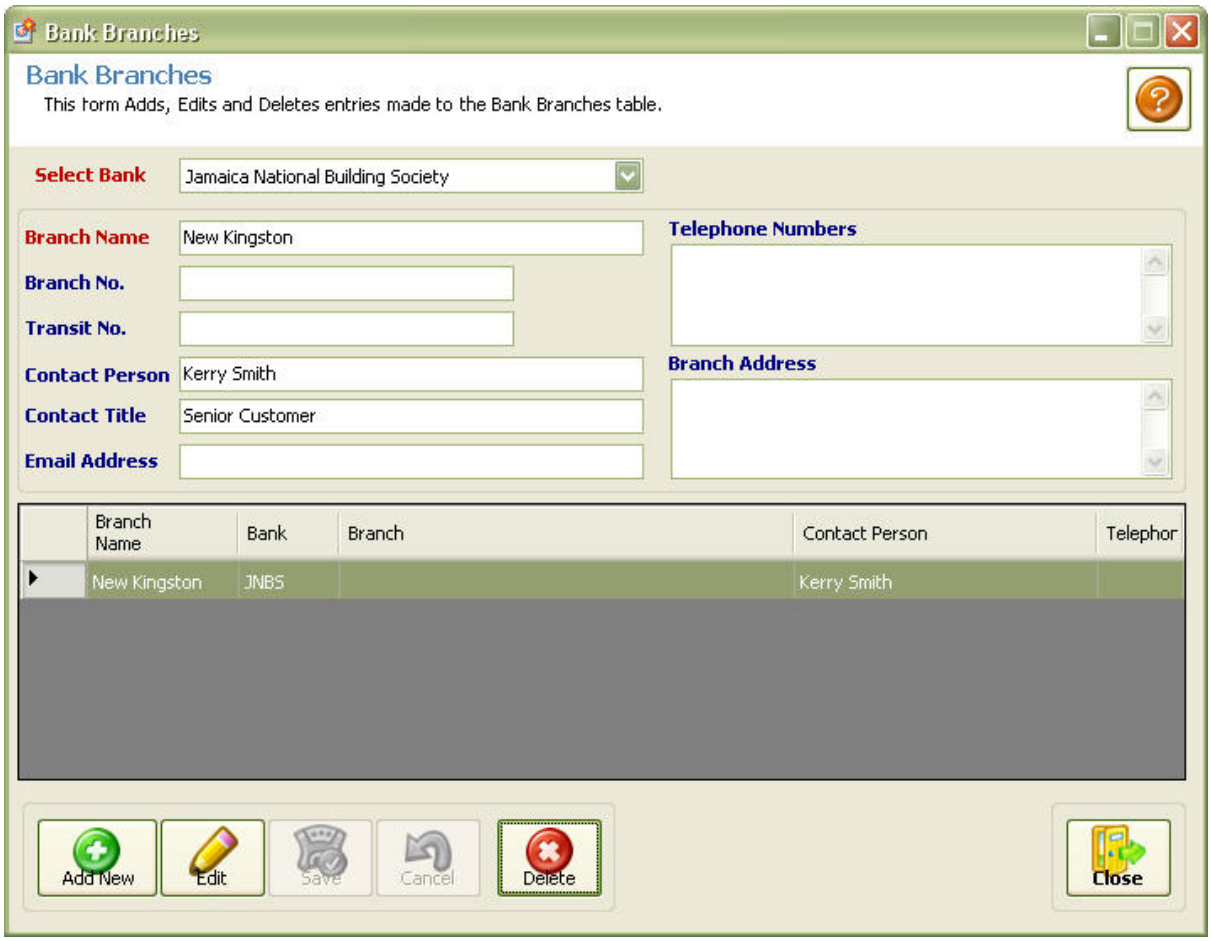
Remember to Save Cancel or Close when done!!

4.4.4.9 Bank Branches

This form maintains a list of entries made to the Bank Branches Table showing each banks detail.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

© 2014 Enter your company name



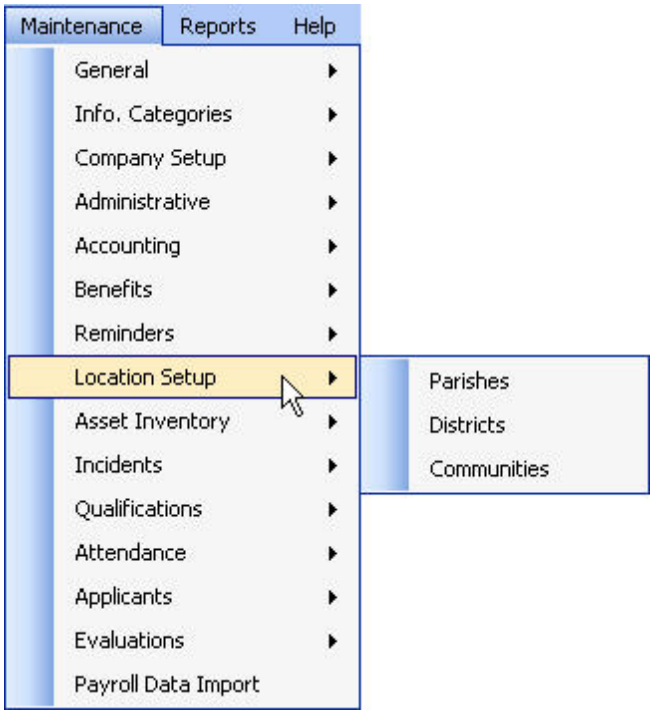
See Add Edit and Delete to learn how to enter information in this screen

Remember to Save Cancel or Close when done!!

4.4.5 Location Setup

Enter topic text here.

© 2014 Enter your company name



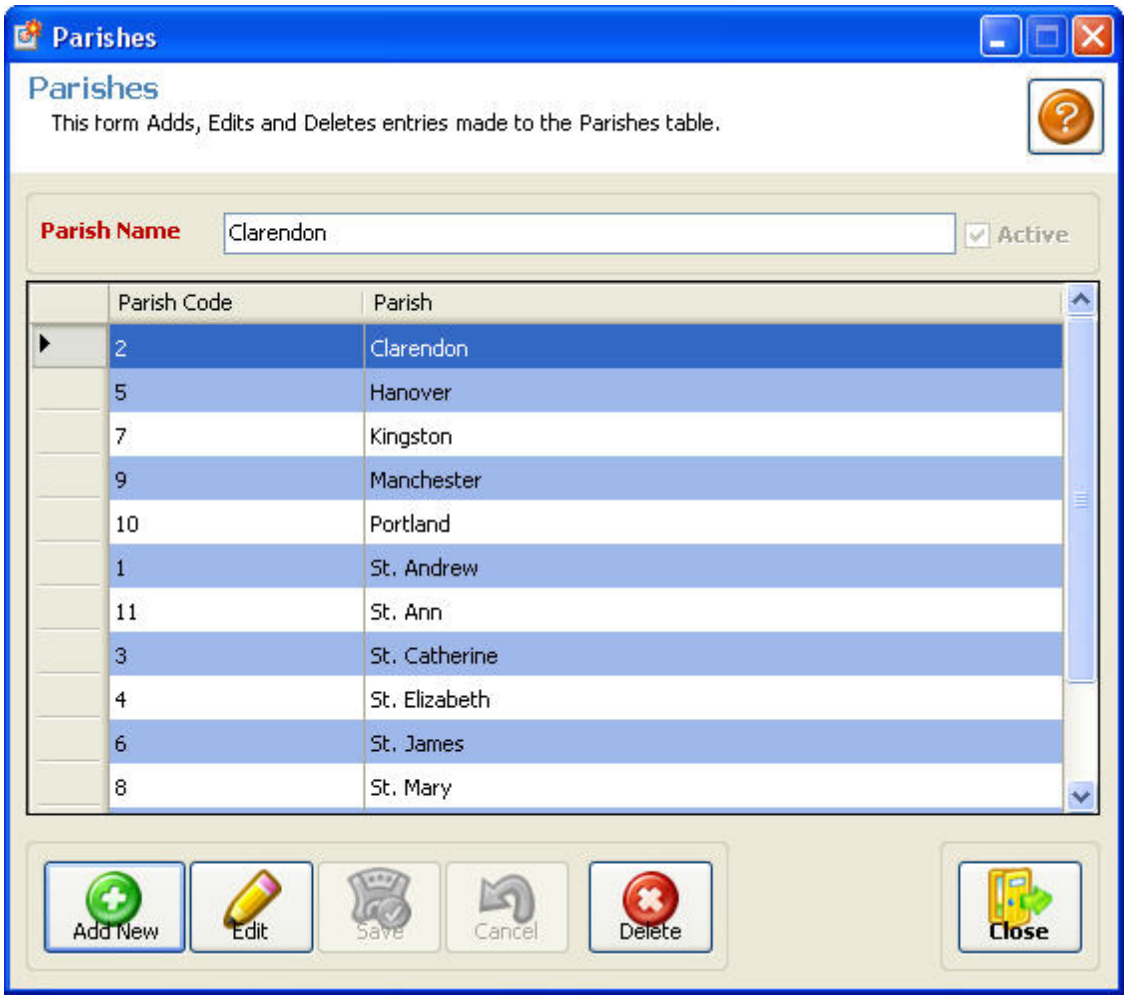
Related Topics:

Parishes
Districts
Communities

4.4.5.1 Parishes

This form maintains the list of parishes where branches are located

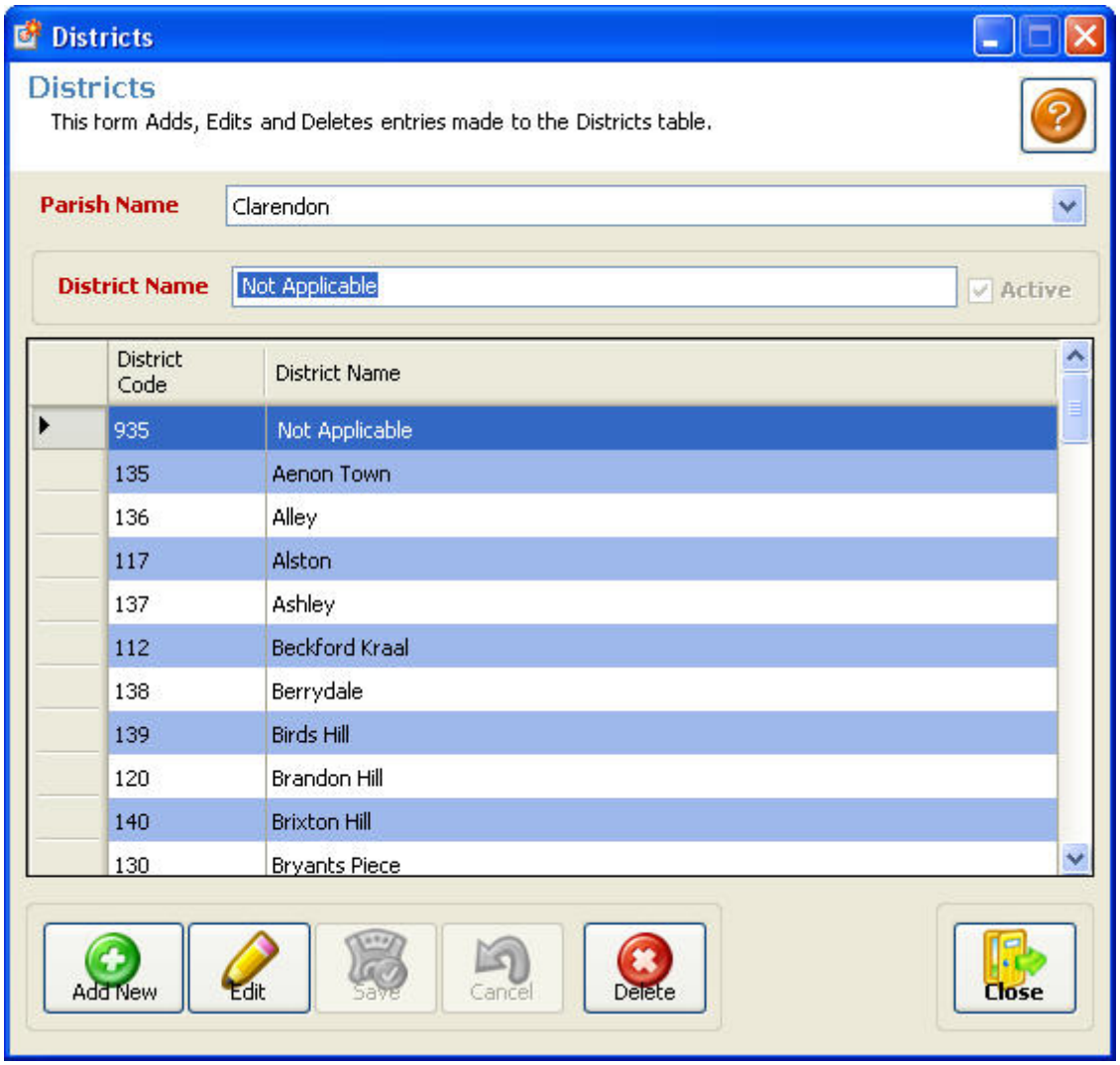
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.4.5.2 Districts

This form allows for the maintenance of districts within parishes where branches can be found.

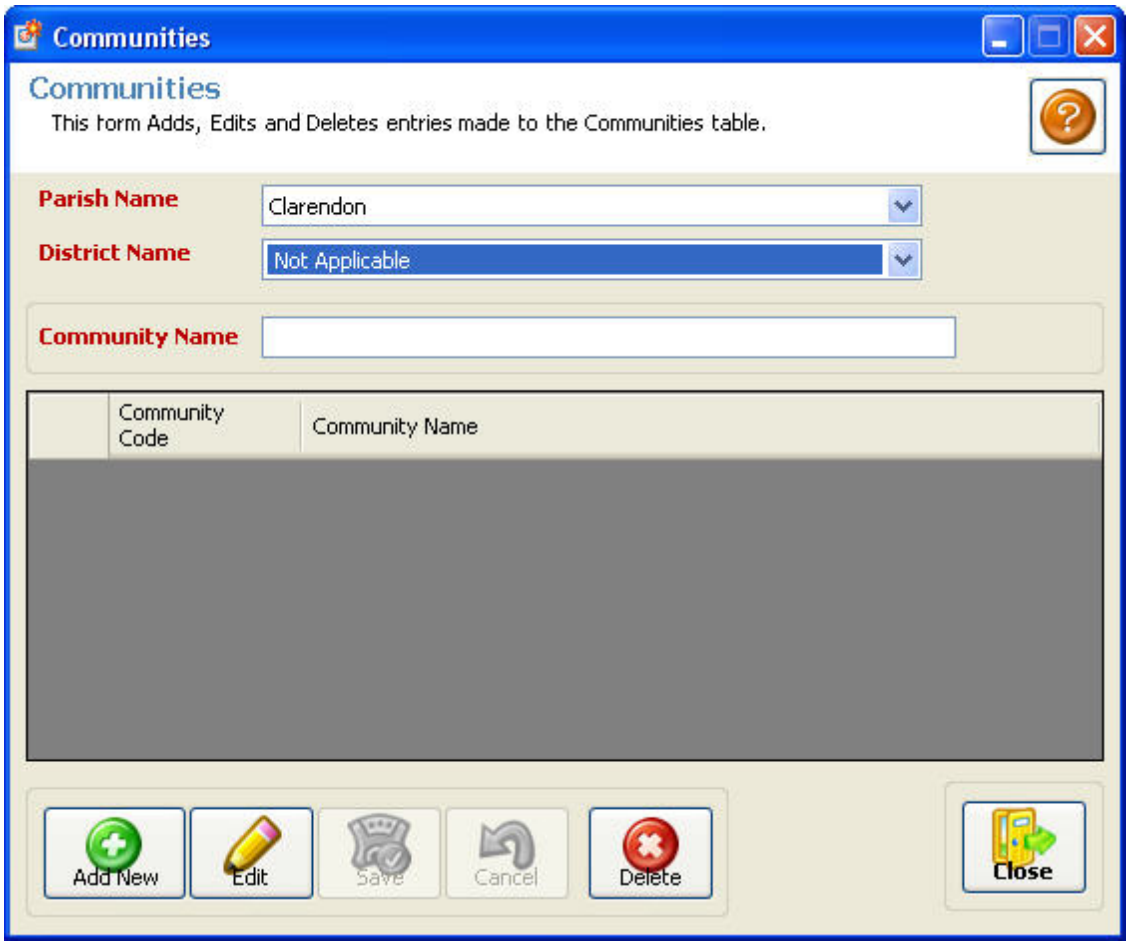
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.4.5.3 Communities

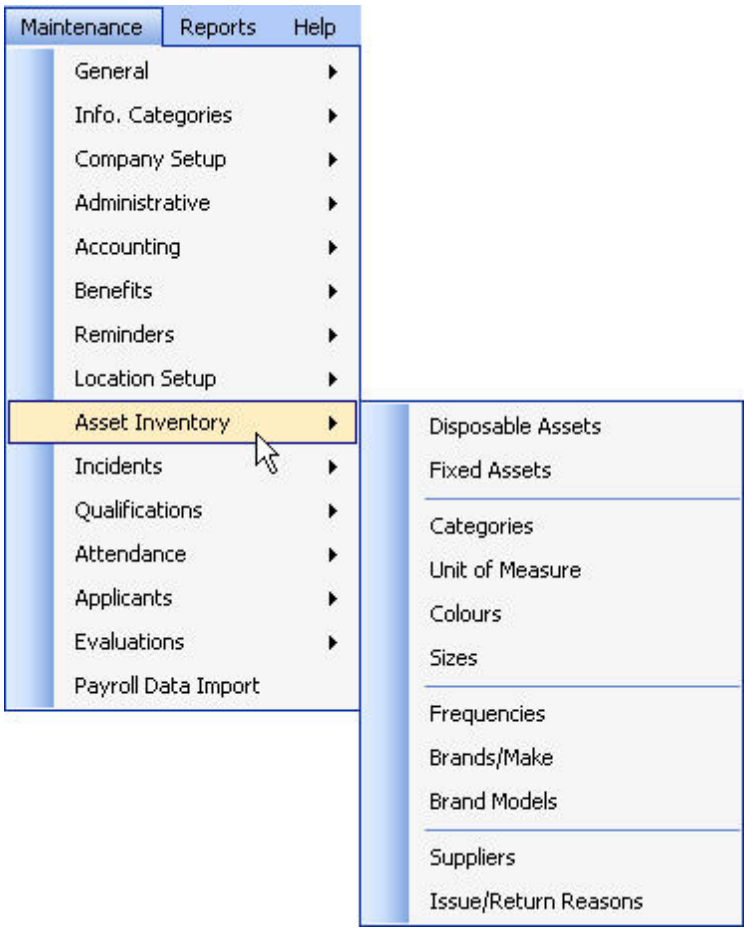
This form maintains the communities, within districts where the company's branches can be located.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.4.6 Asset Inventory

In this section of the Maintenance menu, all asset related data is setup here.



Related Topics:

Disposable Assets
Fixed Assets
Categories
Unit of Measure
Colours
Sizes
Frequencies
Brands/Make
Brand Models
Suppliers
Issue/Return Reasons

4.4.6.1 Disposable Assets

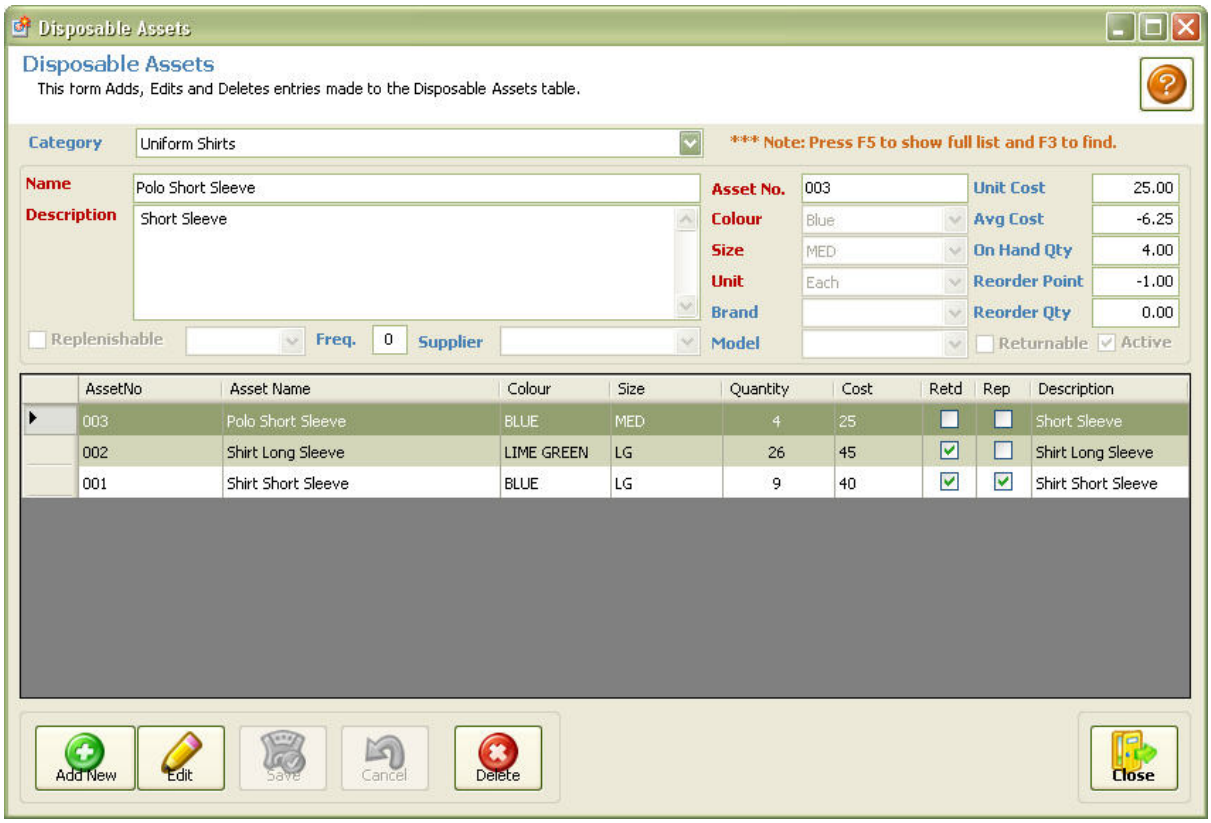
This form maintains a list of disposable assets issued to the employee. Disposables are assets that expire or get thrown out after a certain time has passed like

uniforms. When entering assets of similar type and different colors and sizes, it is ideal to set the asset description to the same text. For example:

NAME / DESCRIPTION	SIZE	COLOR
UNIFORM PANTS MALE	XL	WHITE
UNIFORM PANTS MALE	XL	BLACK
UNIFORM PANTS MALE	SM	WHITE
UNIFORM PANTS MALE	LG	WHITE

When setting up an asset be sure to:

1. Remember if the asset is Replenish-able and set the frequency and the number.
2. Check if the asset is returnable so that when employees are separated the asset return list is generated.



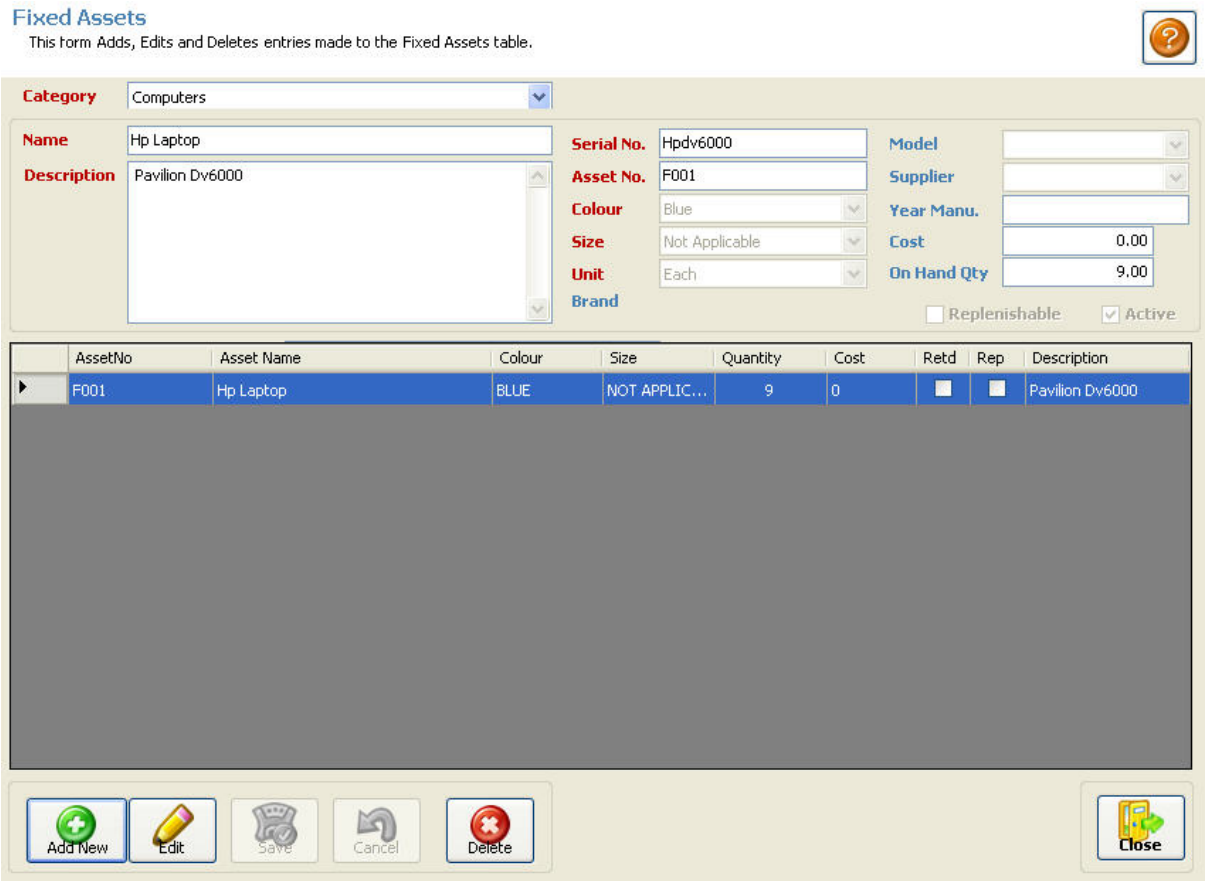
4.4.6.2 Fixed Assets

This form allows for the maintenance of fixed assets distributed throughout the organization. Each item must have a serial and asset number, these should be listed along with the item's description, colour, size and unit. Fixed assets are generally considered equipments such as tablets, cell phones and computers.

© 2014 Enter your company name

When setting up an asset be sure to:

1. Remember if the asset is Replenish-able and set the frequency and the number.
2. Check if the asset is returnable so that when employees are separated the asset return list is generated.

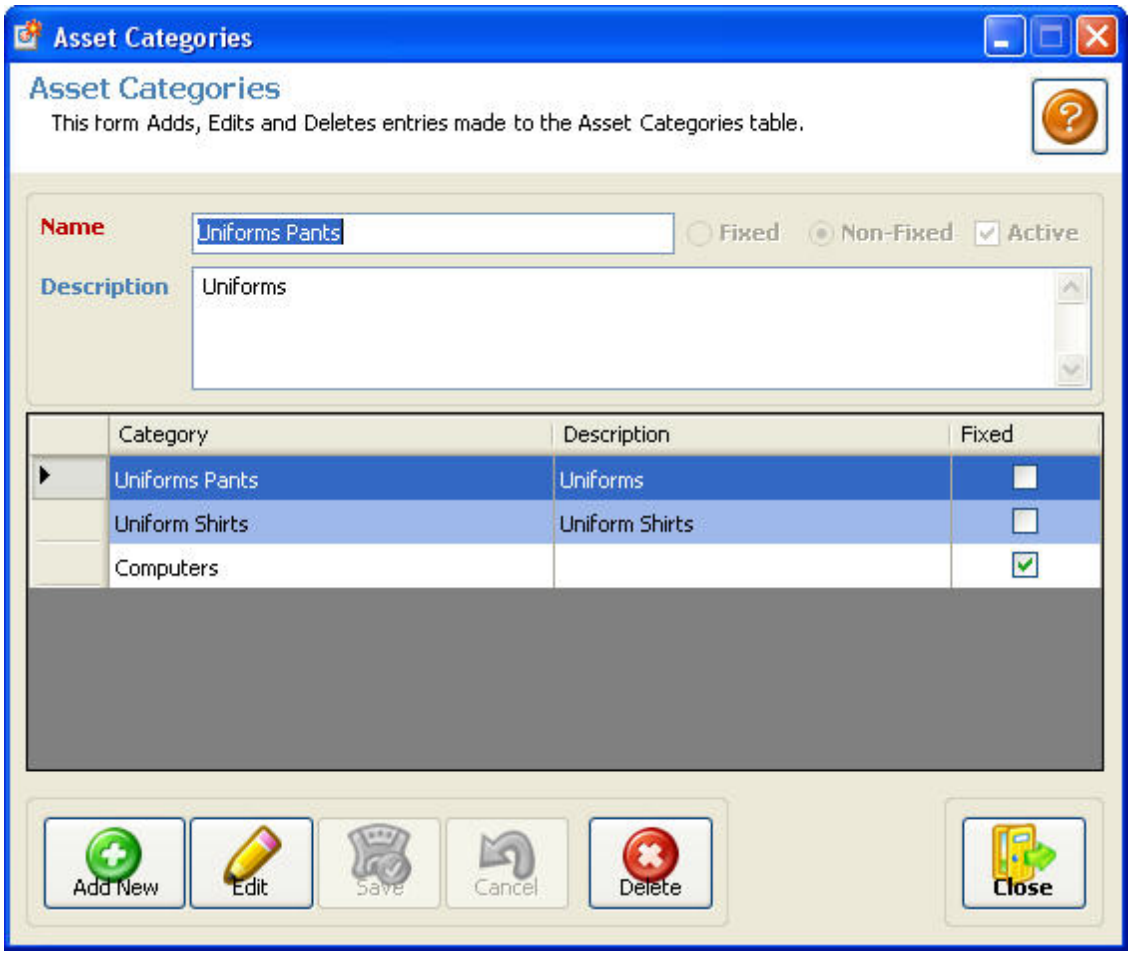


4.4.6.3 Categories

For an organized inventory Assets are to be place in categories for example Uniform shirts, Pants, Safety Gears etc. These help define other asset data such as sizes and the asset inventory itself.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

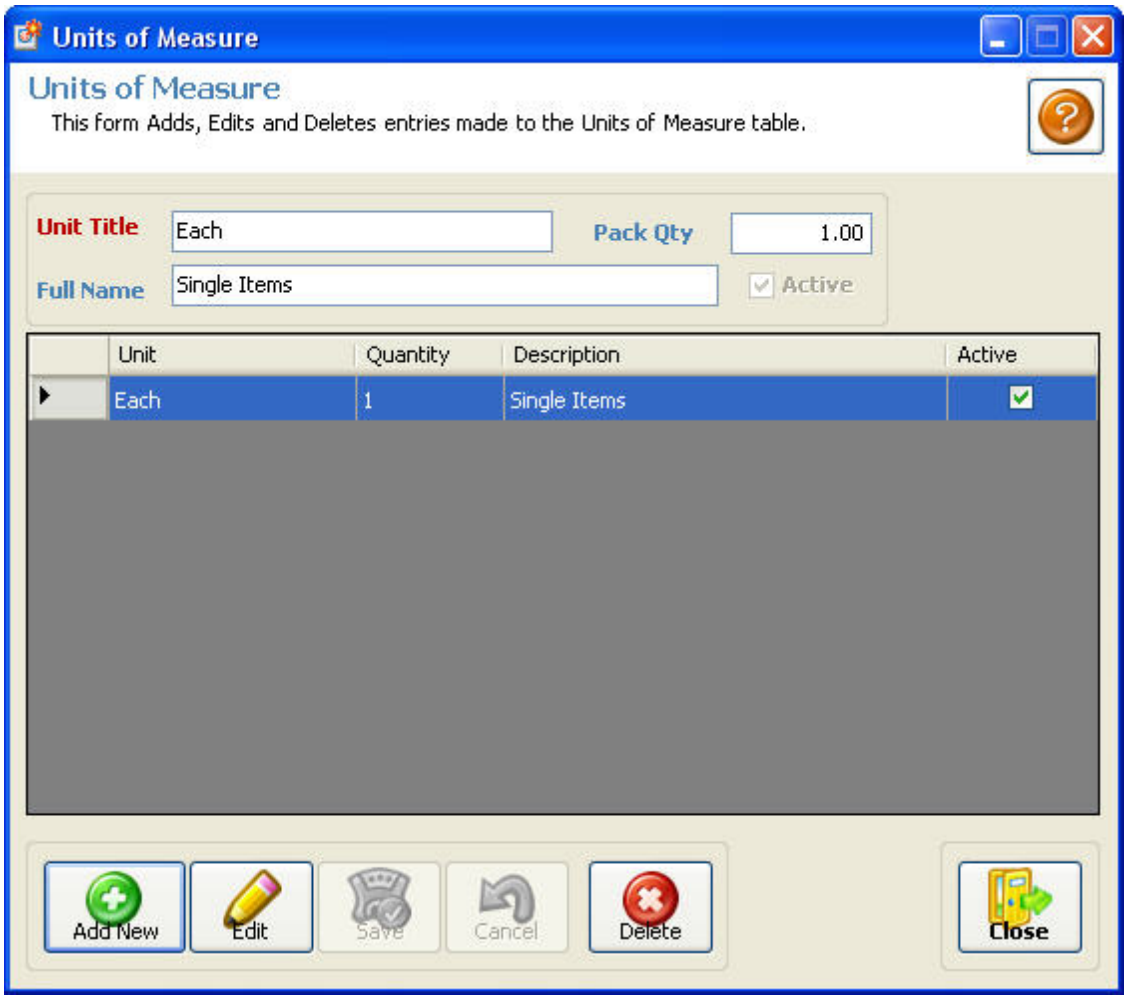
© 2014 Enter your company name



4.4.6.4 Units of Measure

This form allows for to the package quantity of each asset issued from the employee to be defined. Assets me come single, in pairs or packs.

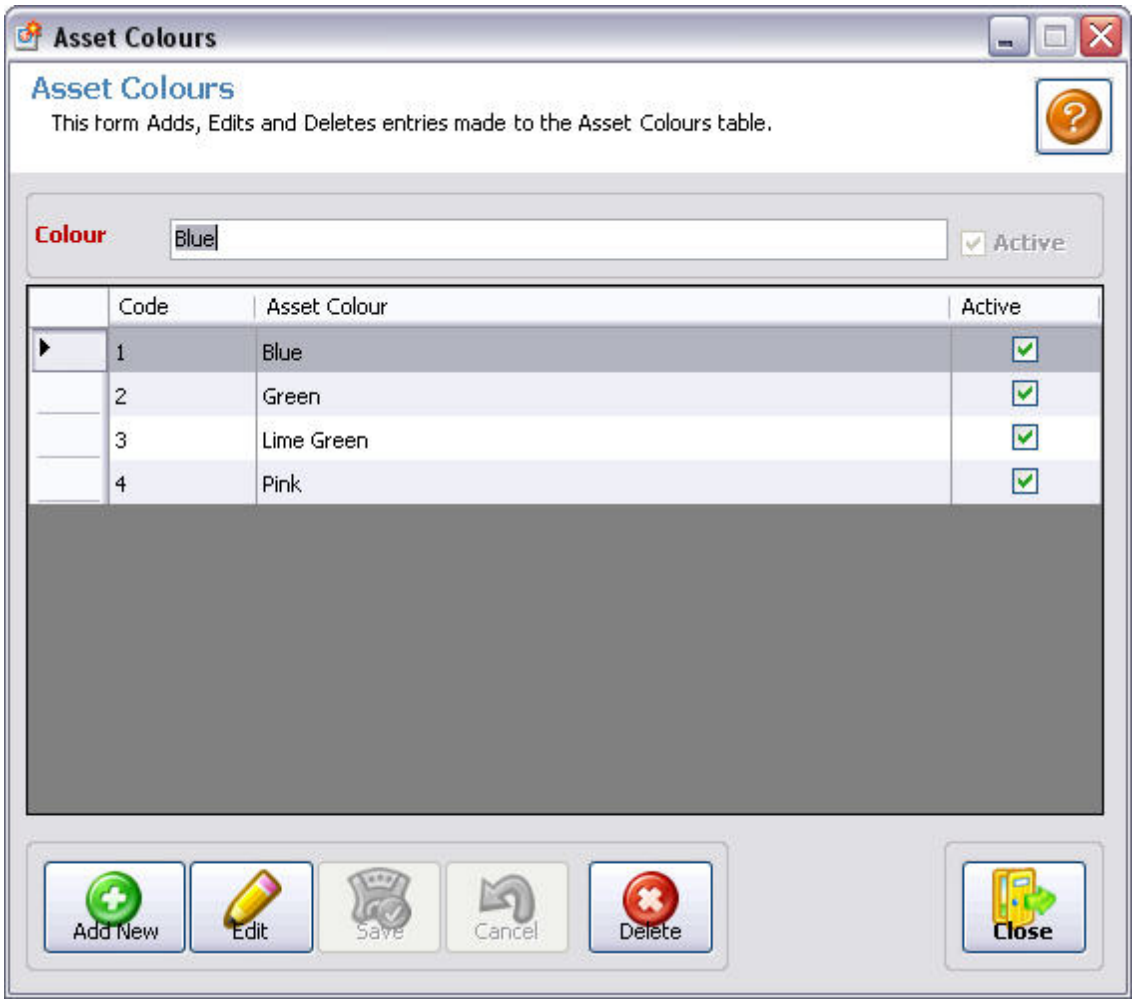
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.4.6.5 Colours

This form maintains the colours of assets issued to the employees.

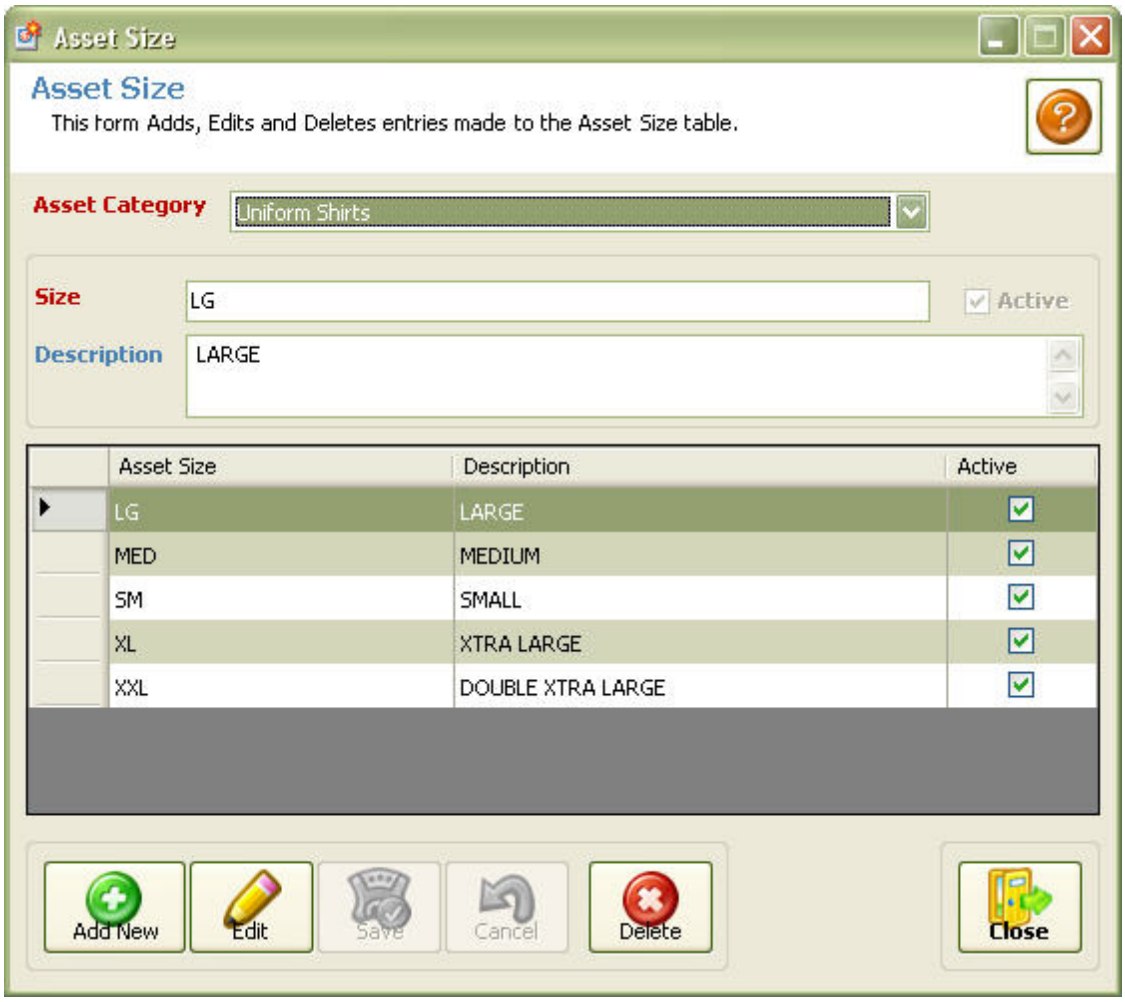
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.4.6.6 Sizes

This form maintains the size of assets issued and are setup by categories. For example shirts come in LARGE, XTRA LARGE while pants come in waist sizes such as 36W, 38W etc.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

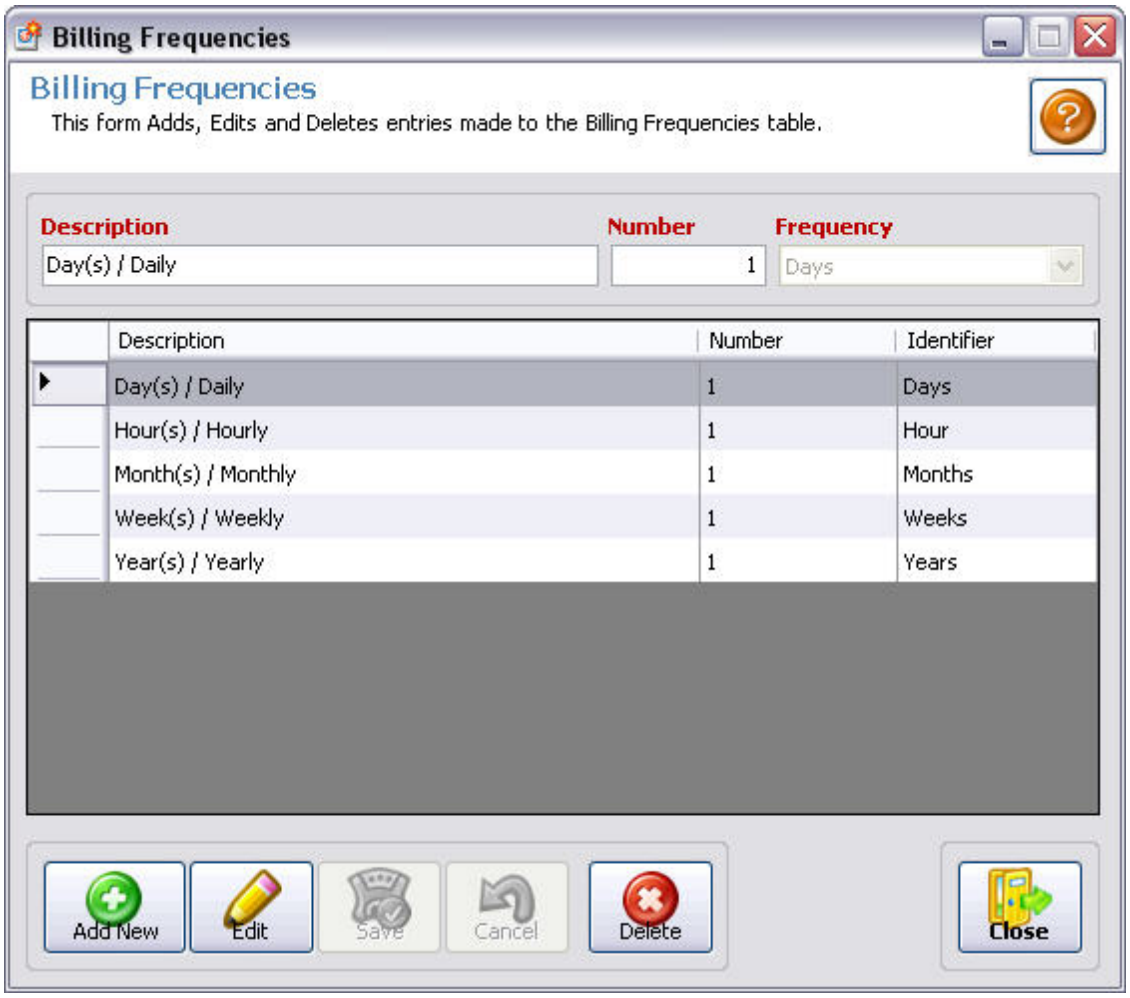


4.4.6.7 Frequencies

This form maintains the frequency with which a particular assets is to be issued to the employee. Listing may include daily, weekly or monthly. Assets such as uniforms wear out over time and needs to be replaced at intervals.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

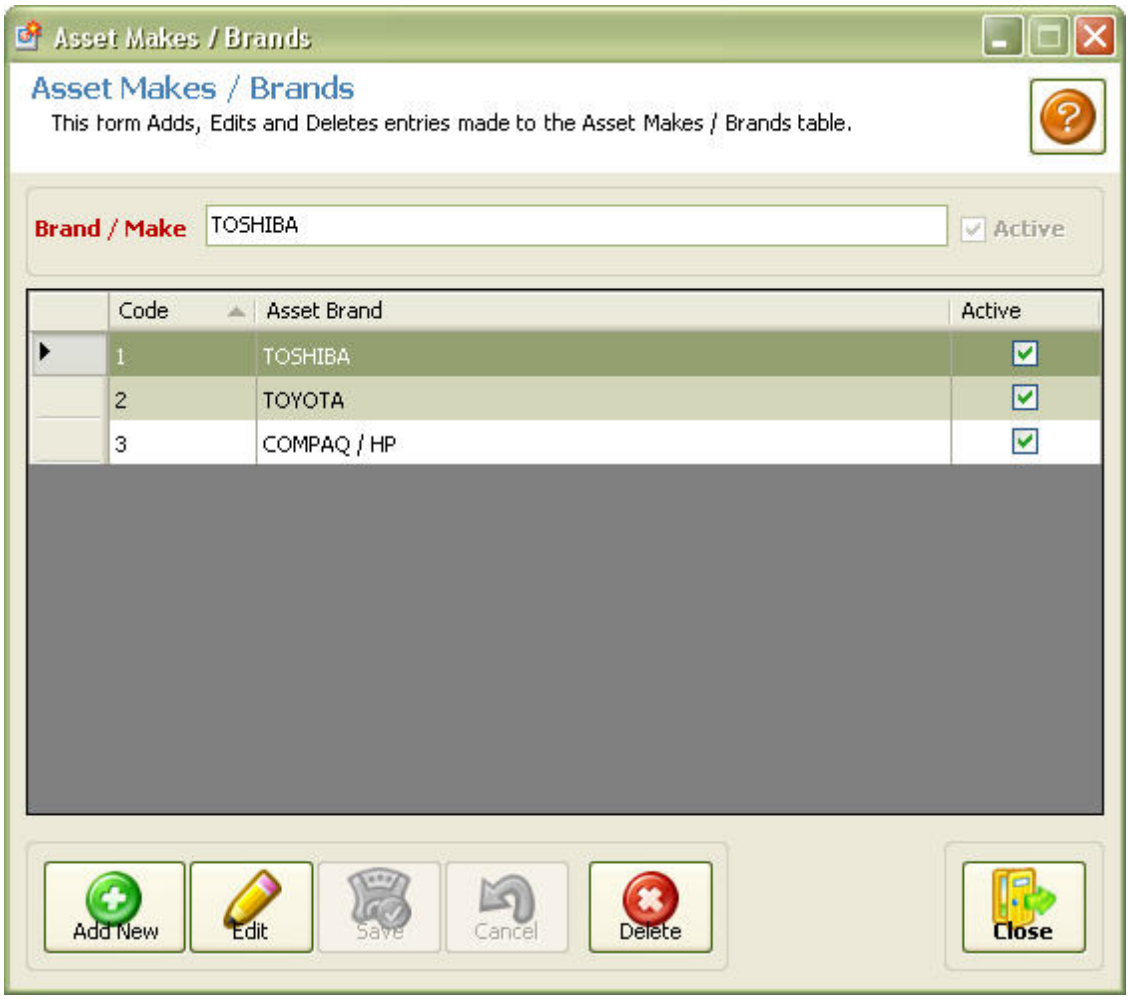
© 2014 Enter your company name



4.4.6.8 Brands/Makes

This form maintains the brands or makes of the assets within the organization. For example Toshiba, Compaq, Polo, Oxford etc.

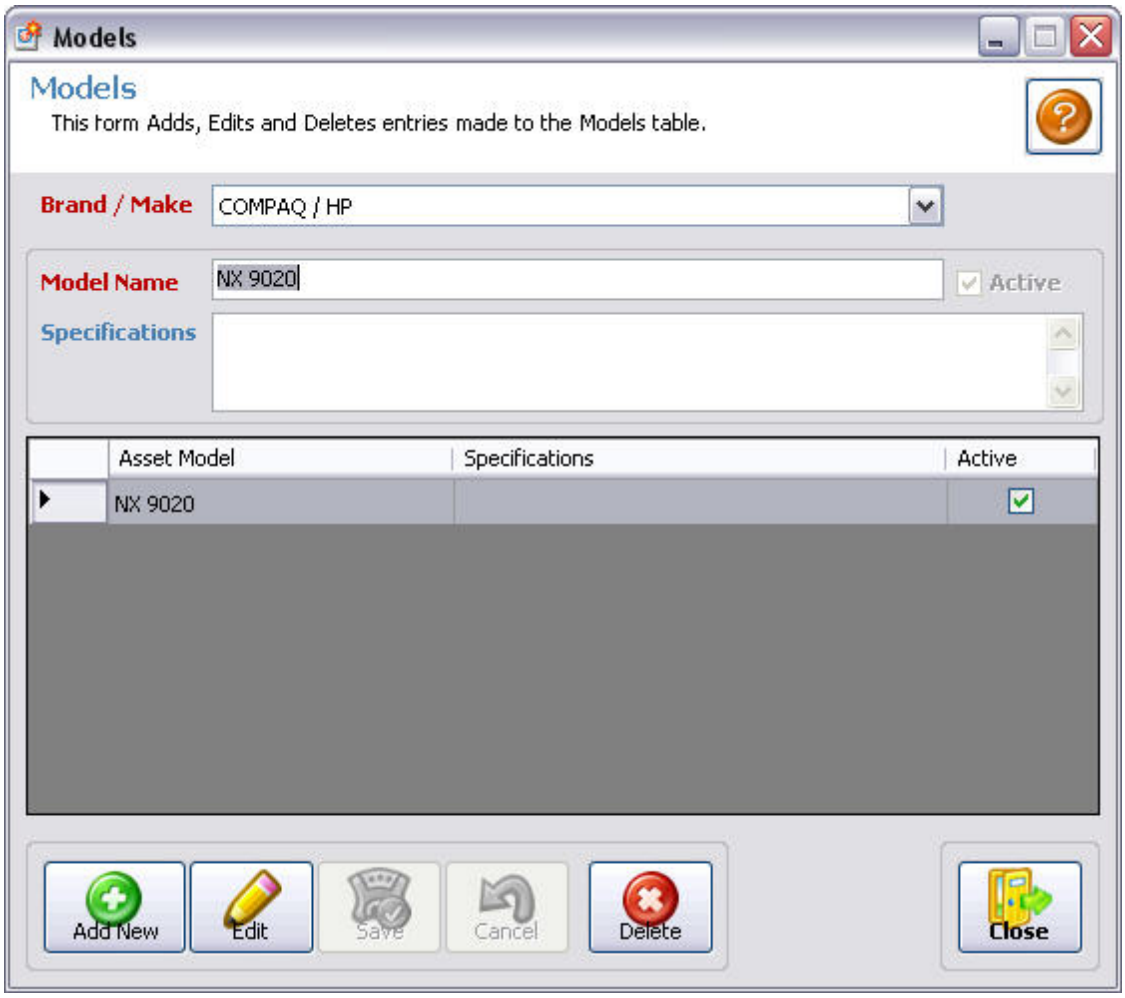
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.4.6.9 Brand Models

This form goes further than Asset Makes/Brands to maintain the specific models for each brand.

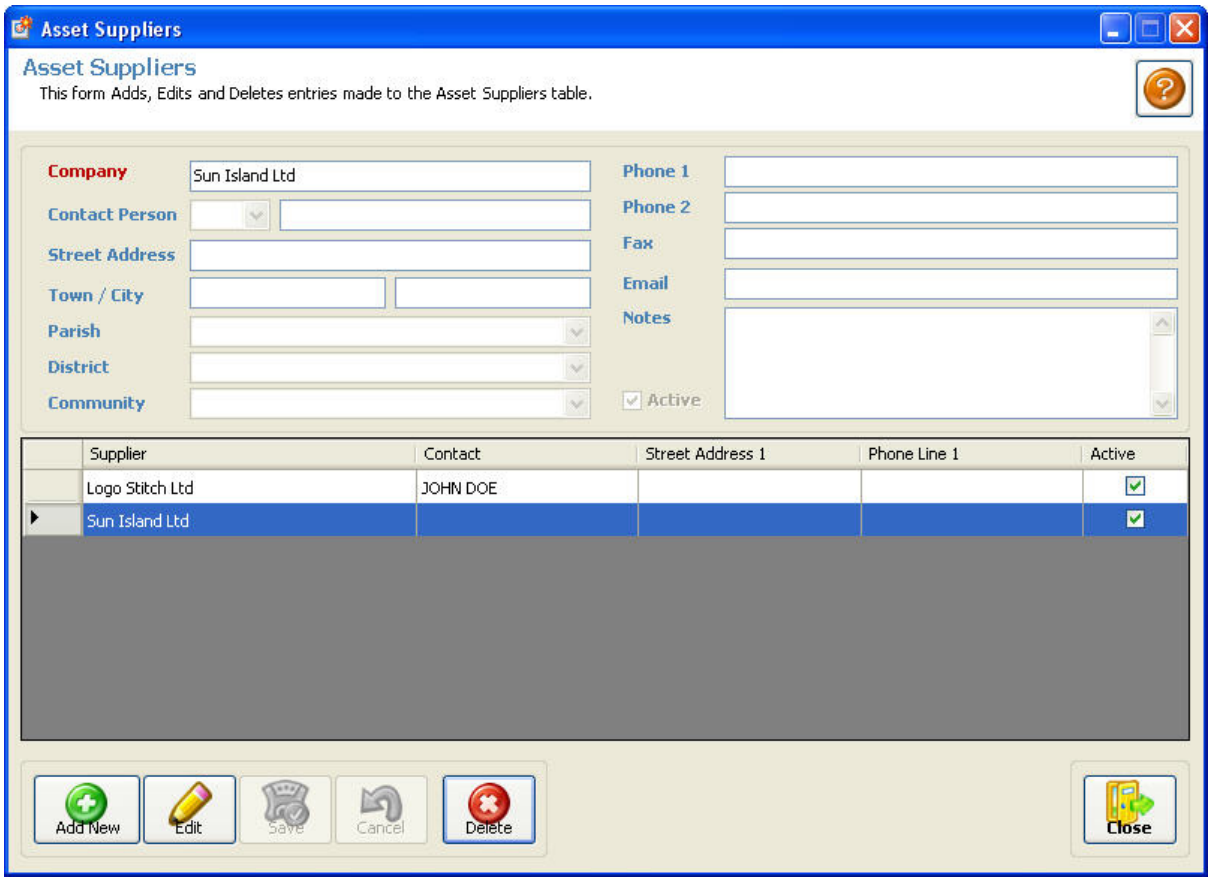
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.4.6.10 Suppliers

This form maintains a list of the companies that supply the various assets to the organization. It is also advised to add your company as a supplier for inventory adjustment purposes.

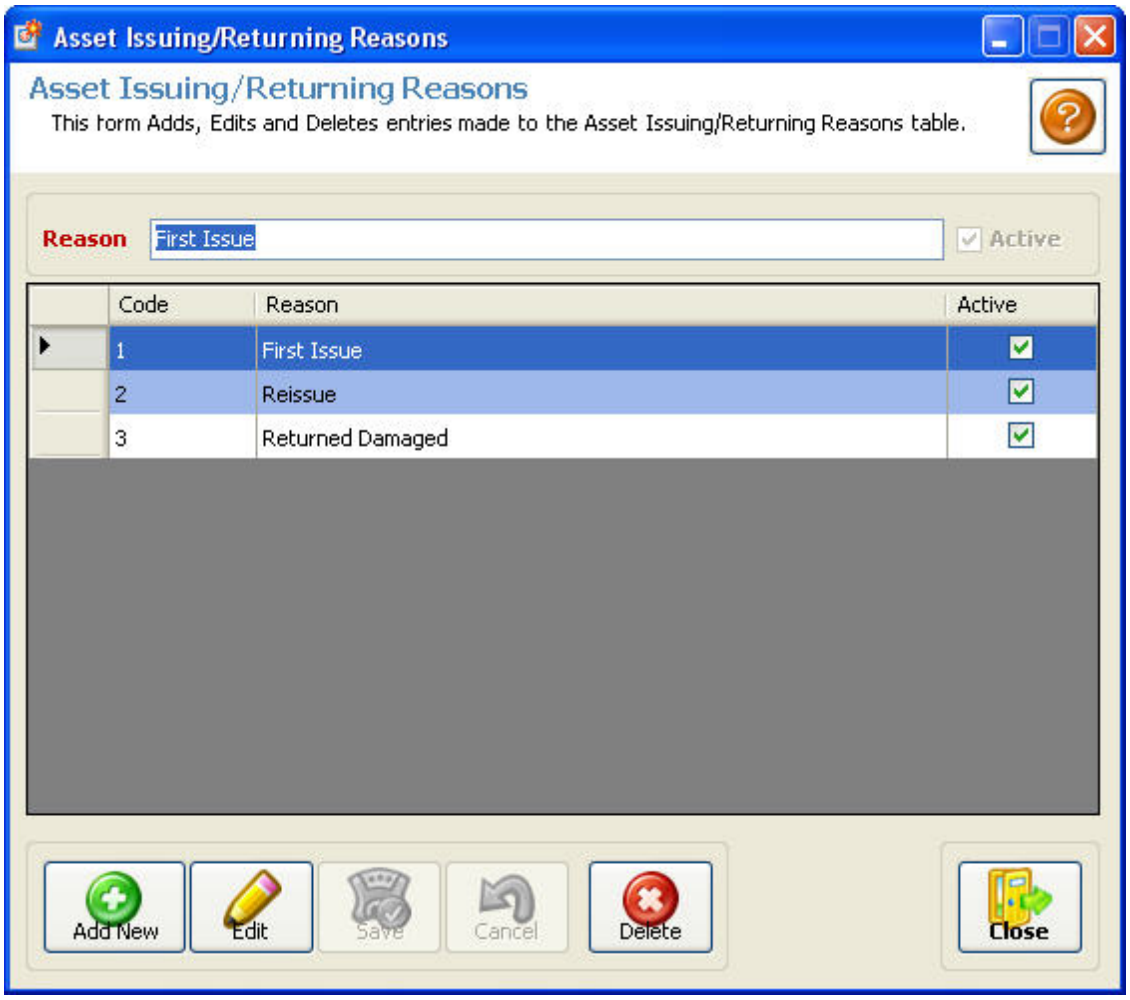
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.4.6.11 Issue/Return Reasons

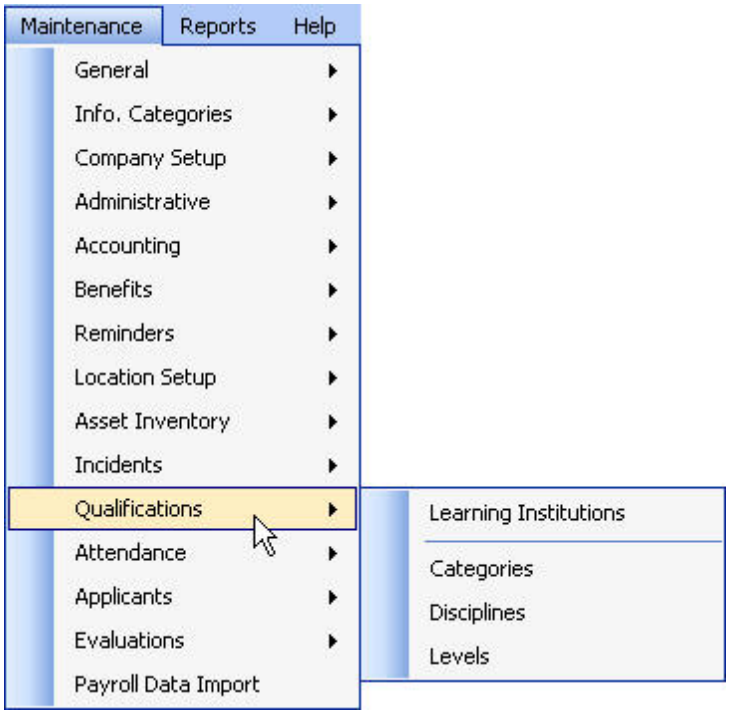
This form maintains the reason given for issuing or returning an asset between the employer and employee. For example a new employee receiving his/her uniform would be treated as a “First Issue”

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.4.7 Qualifications

This form maintains the qualifications and all information associated with an employee's disciplines.



Related Topics

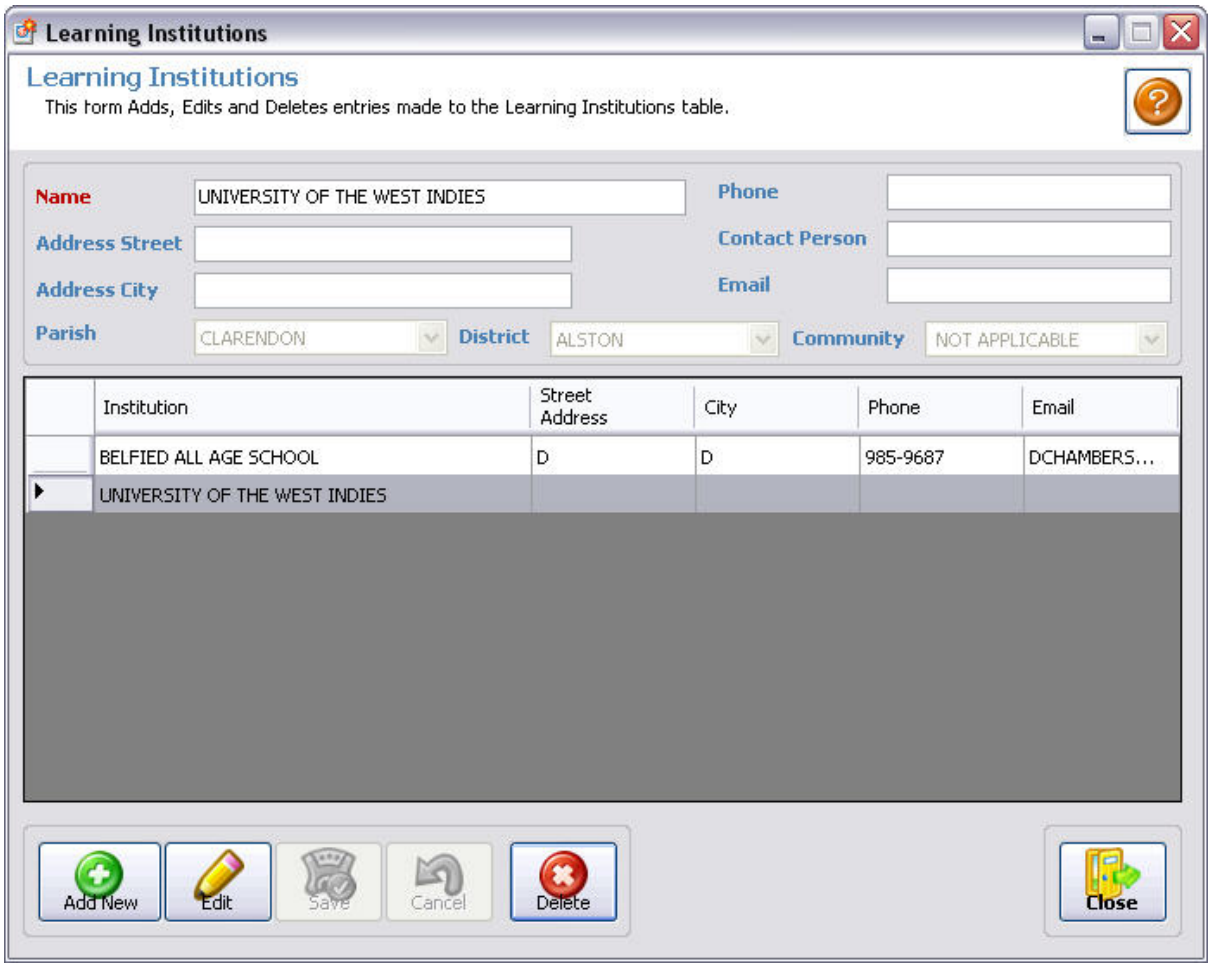
Learning Institutions
Categories
Disciplines
Levels

4.4.7.1 Learning Institutions

This form maintains a list of learning institutions where the employee may have acquired certification or training. Two examples of these include HEART Trust NTA or the University of Technology Jamaica.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

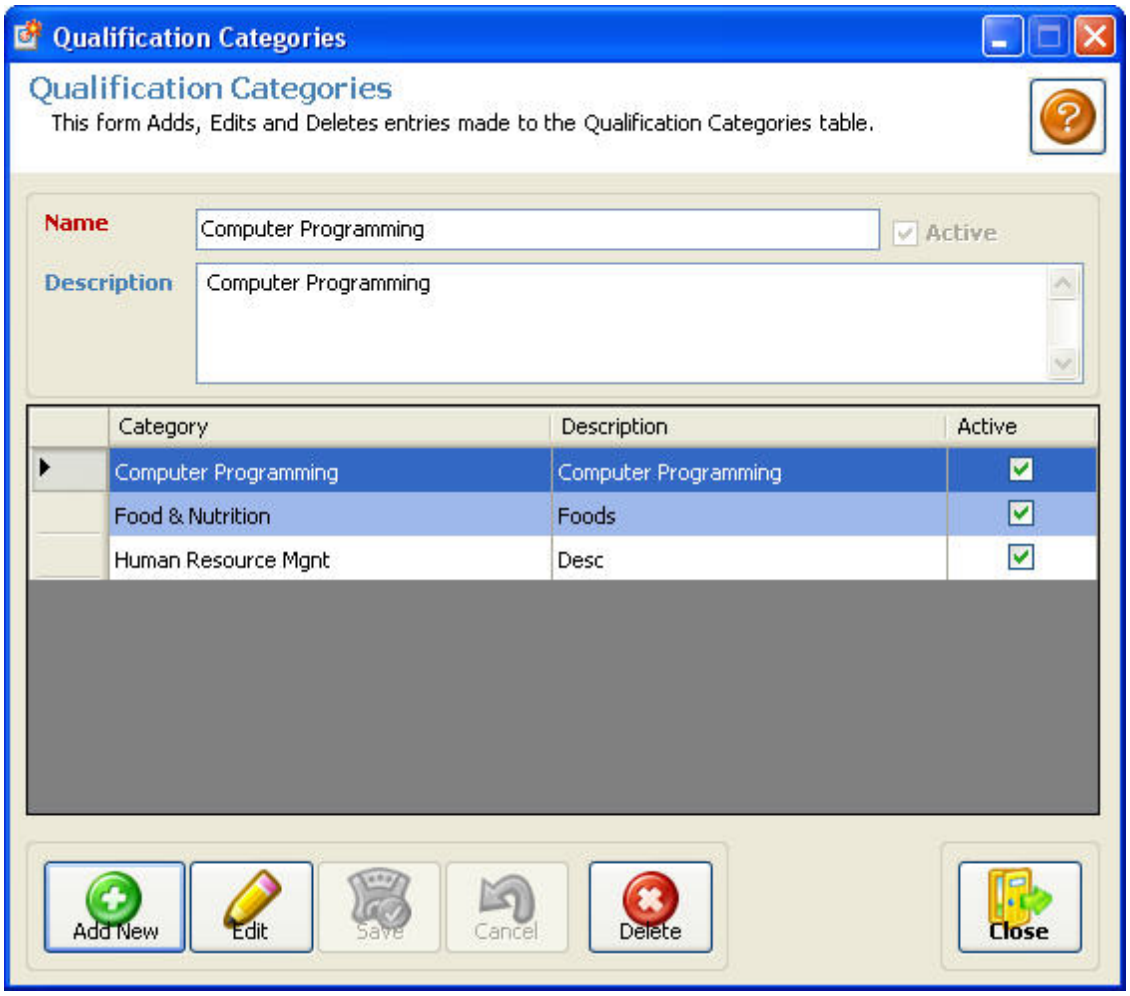
© 2014 Enter your company name



4.4.7.2 Categories

This form maintains the various categories that an employee could have earned their qualification in. A brief description may be submitted on the form as well.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

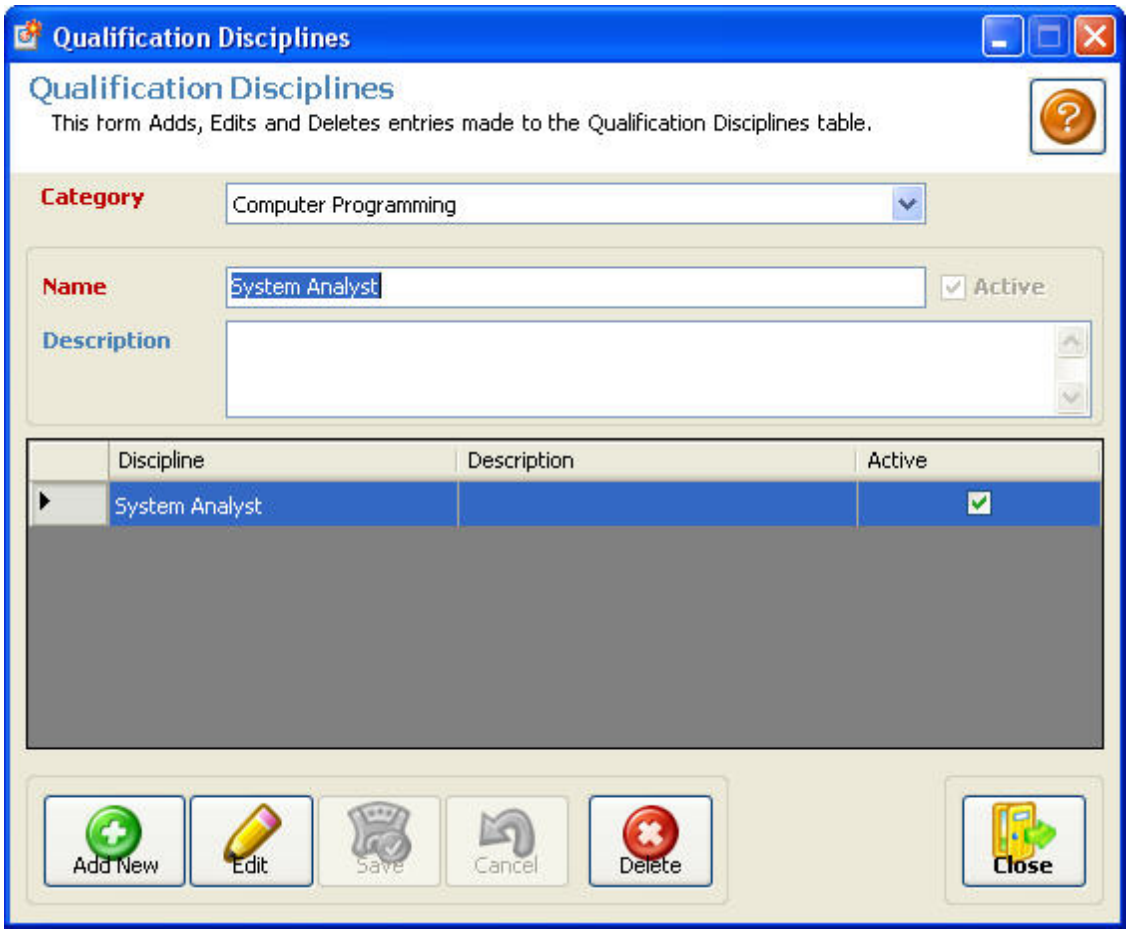


4.4.7.3 Disciplines

This form allows for maintaining a list of specific disciplines. Where an individual may be taking a major, the discipline would be edited in this form.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

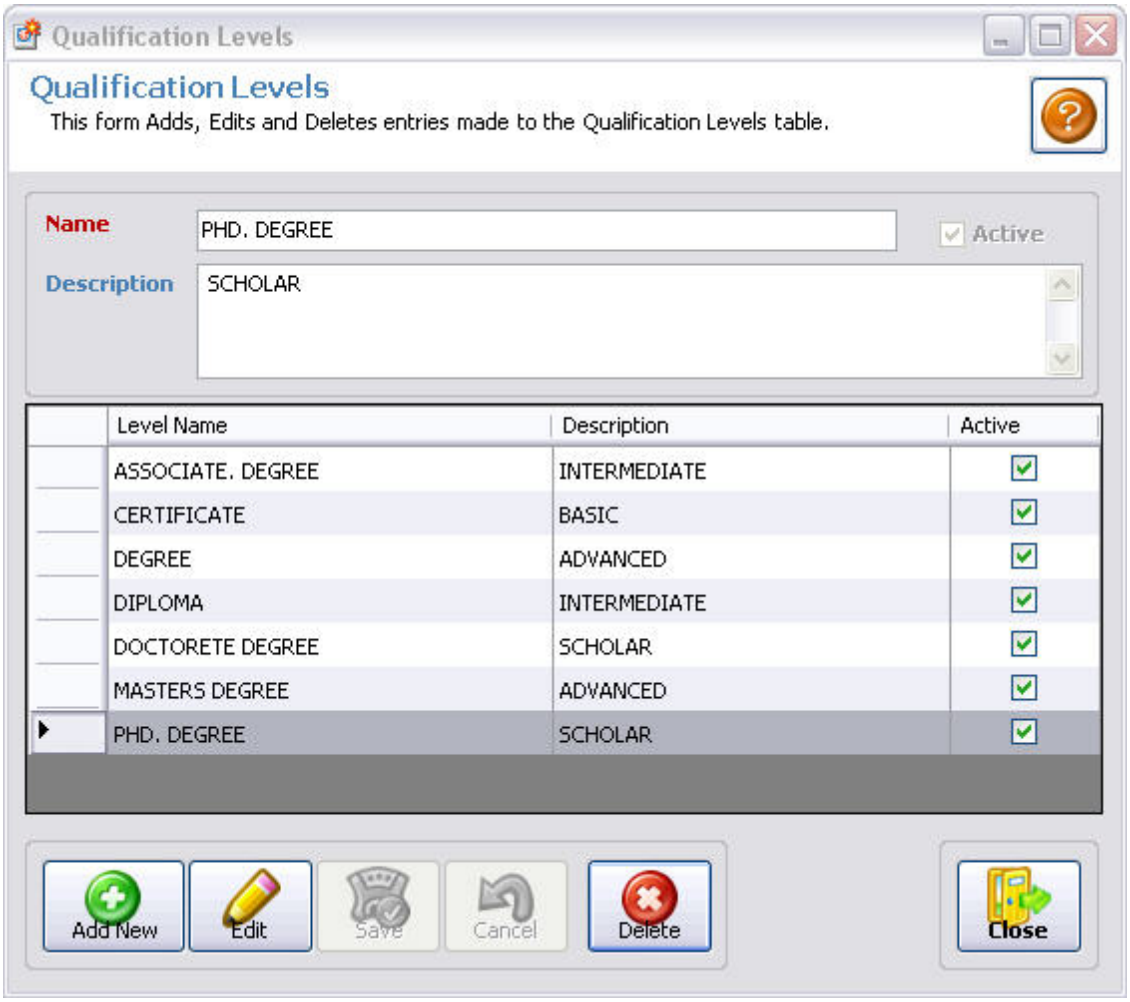
© 2014 Enter your company name



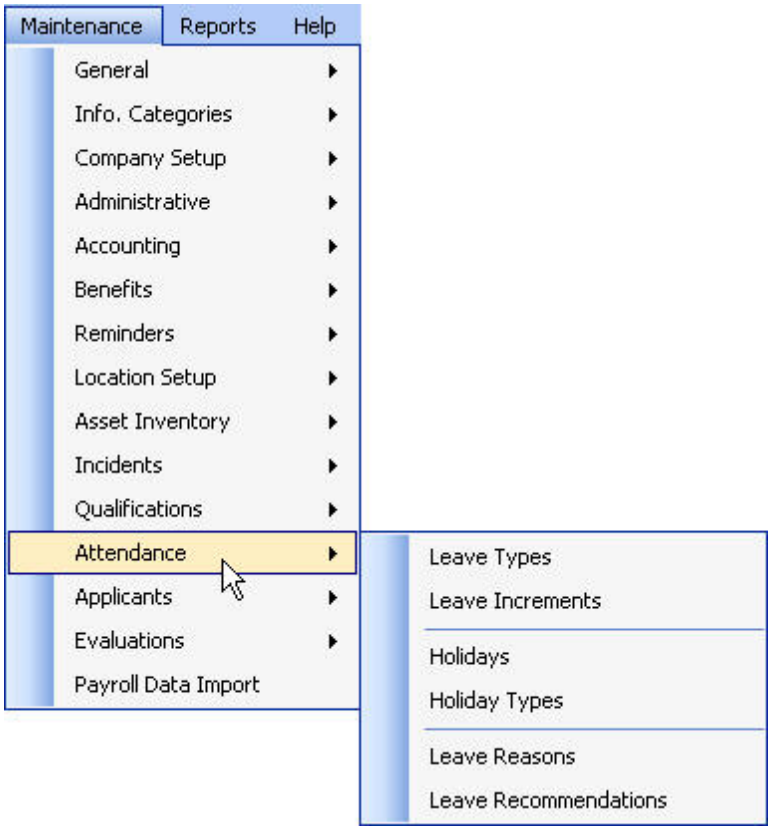
4.4.7.4 Levels

This form maintains the various levels of qualifications earned by an employee, these may include but not limited to Associate's Degree and Bachelor's Degree.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!


Qualification Levels
Qualification Levels
This form Adds, Edits and Deletes entries made to the Qualification Levels table.
Name
PHD. DEGREE
Active
Description
SCHOLAR
Level Name
Description
Active
ASSOCIATE. DEGREE
INTERMEDIATE
CERTIFICATE
BASIC
DEGREE
ADVANCED
DIPLOMA
INTERMEDIATE
DOCTORETE DEGREE
SCHOLAR
MASTERS DEGREE
ADVANCED
PHD. DEGREE
SCHOLAR
Add New
Edit
Save
Cancel
Delete
Close

4.4.8 Attendance



Related Topics:

Leave Types
Leave Increments
Holidays
Holiday Types
Leave Reasons
Leave Recommendations

4.4.8.1 Leave Types

This form maintains the types of leaves, data submitted must include the duration, waiting period, entitlement, number of paid days etc. The form also allows for the calculation of maximum carry forward days based on the calendar year or the employment year.

Various types of leave can be setup for different categories of staff such as Managers Level 1,2,3+ and Supervisors etc.

© 2014 Enter your company name

Term Duration: The time period of the leave term, usually one year
Waiting Period: Waiting time for new employees to become eligible for leave type. Usually after probably as a
standard. Sick, No Pay and Compassionate are sometimes given immediately reducing this time.
Entitlement: Days entitled to when the employee reaches this increment threshold
Max C/F Days: Maximum number of days an employee can carry forward from one leave term to the next
Max Paid Days: Maximum number of days an employee can be paid for in the leave term (year)
Period: State if which period balances for this leave should be calculated

Expiration Rules

Carry forward balances allow for unused balances for eg. vacation to accumulate. Sick however would not carry forward any balance as it starts anew each leave term. The auto renew flag tells the system to close off the year automatically.

Balance Includes:

C/F Only balance will show as available only leave earned last term

Total Earned balance will show as available C/F + Current Earnings (Pro-rated)

Entitled balance will show as available C/F + Total Entitlement for the current leave term

Count Options

Each count option if checked will calculate as a work day when employees apply for Leave

Exportable to T & A

When this option is selected all approved leave applications will go over into the Time Clock Time Management

software for payment and export to the payroll. Additional pay settings are setup in the Time Clock software

Employee Type & Gender

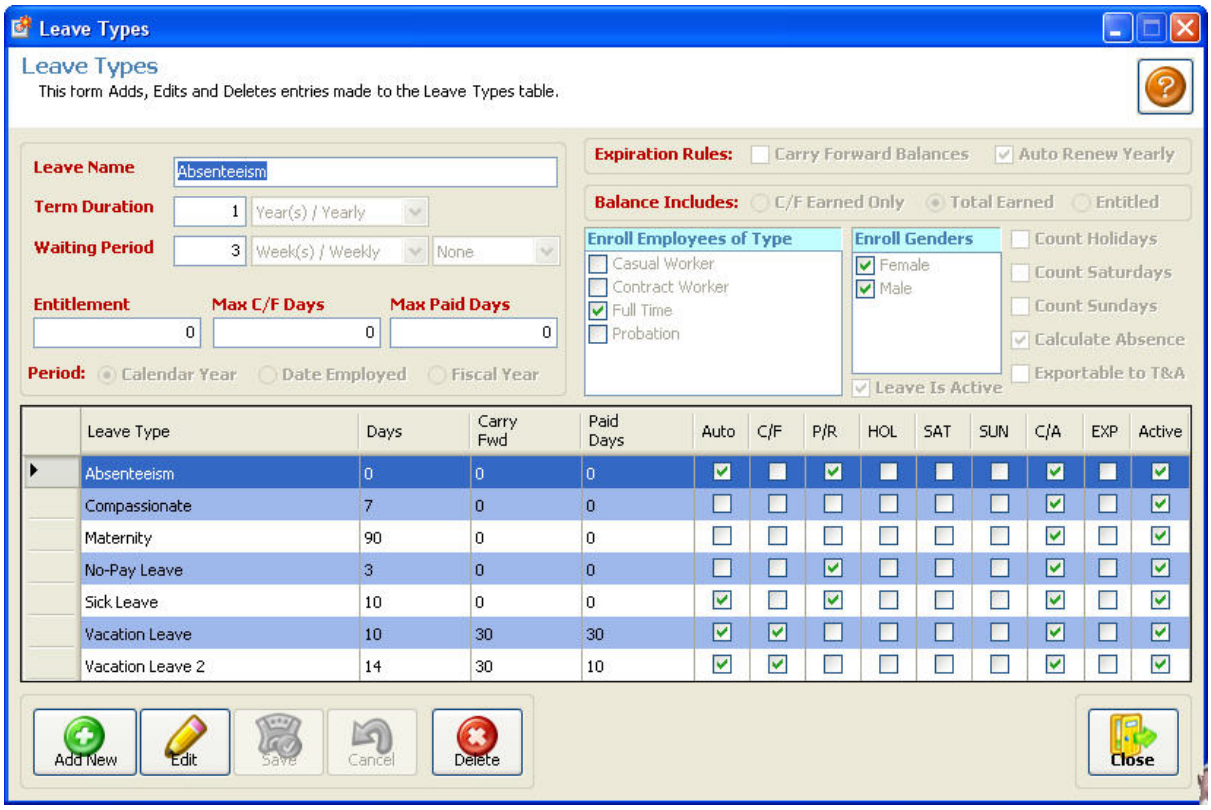
© 2014 Enter your company name

The selected Employee Types and Genders determine which leave options show up when doing Leave Stock

NOTE: When creating different level of entitlements for Eg.varied levels of management, also create matching Employee

Types. Eg. VACATION LEVEL 1 = Full Time Staff - Manager Level 1 (*Employee Type*).

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.4.8.2 Leave Increments

Leave Increments define the variation of entitlements of vacation days based on years of service.

For example:

1 - 5 years = 10 days entitlement (This should not be entered as a leave increment as it will be the default number of days entered on the Leave Type setting)

6 - 10 years = 15 days entitlement (This will be entered as a leave increment as the number of days increased from the default when the employee gets to 6years)

© 2014 Enter your company name

End of Year No If the employee starts earning the in 6th year, this value would be 5

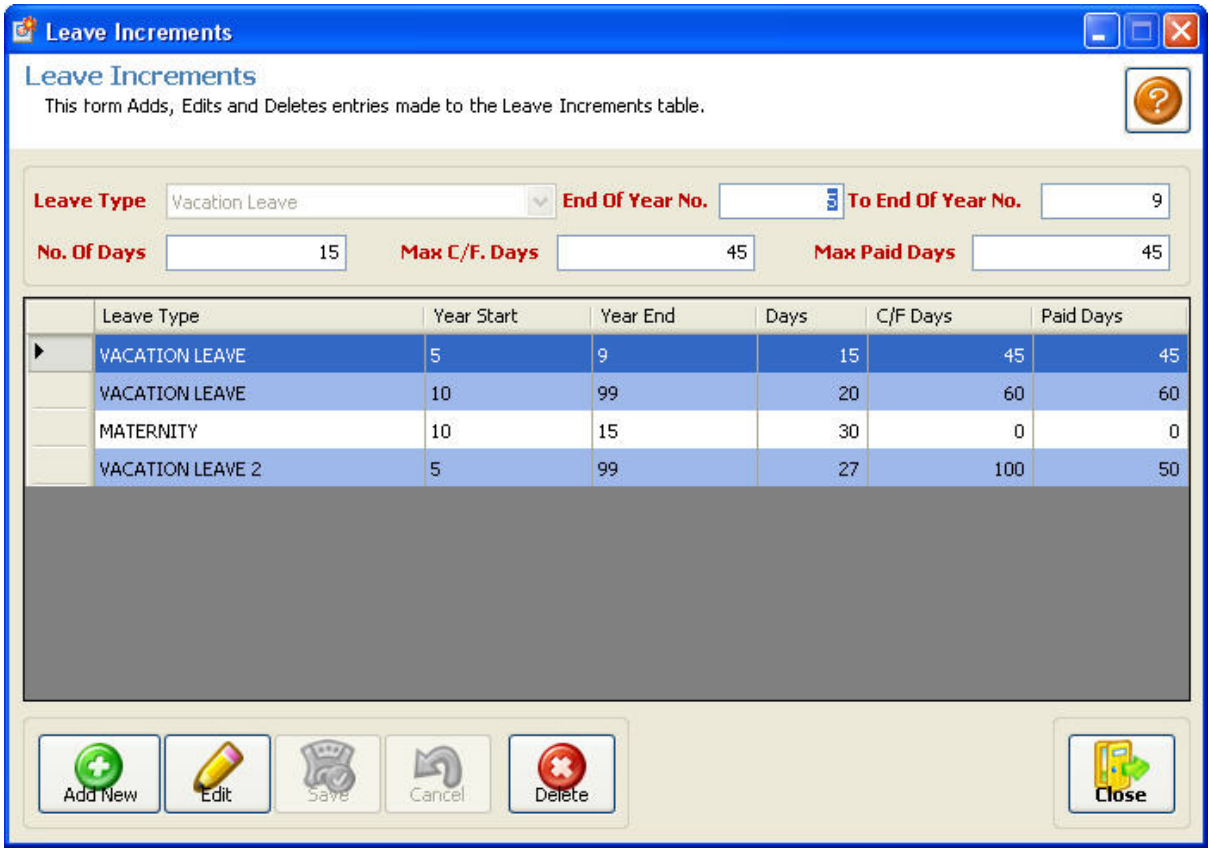
To End Of Year: This is the end year in which the increment should stop. You can use 99 as a maximum for the last increment

No. Of Days: Days entitled to when the employee reaches this increment threshold

Max C/F Days: Maximum number of days an employee can carry forward from one leave term to the next

Max Paid Days: Maximum number of days an employee can be paid for in the leave term (year)

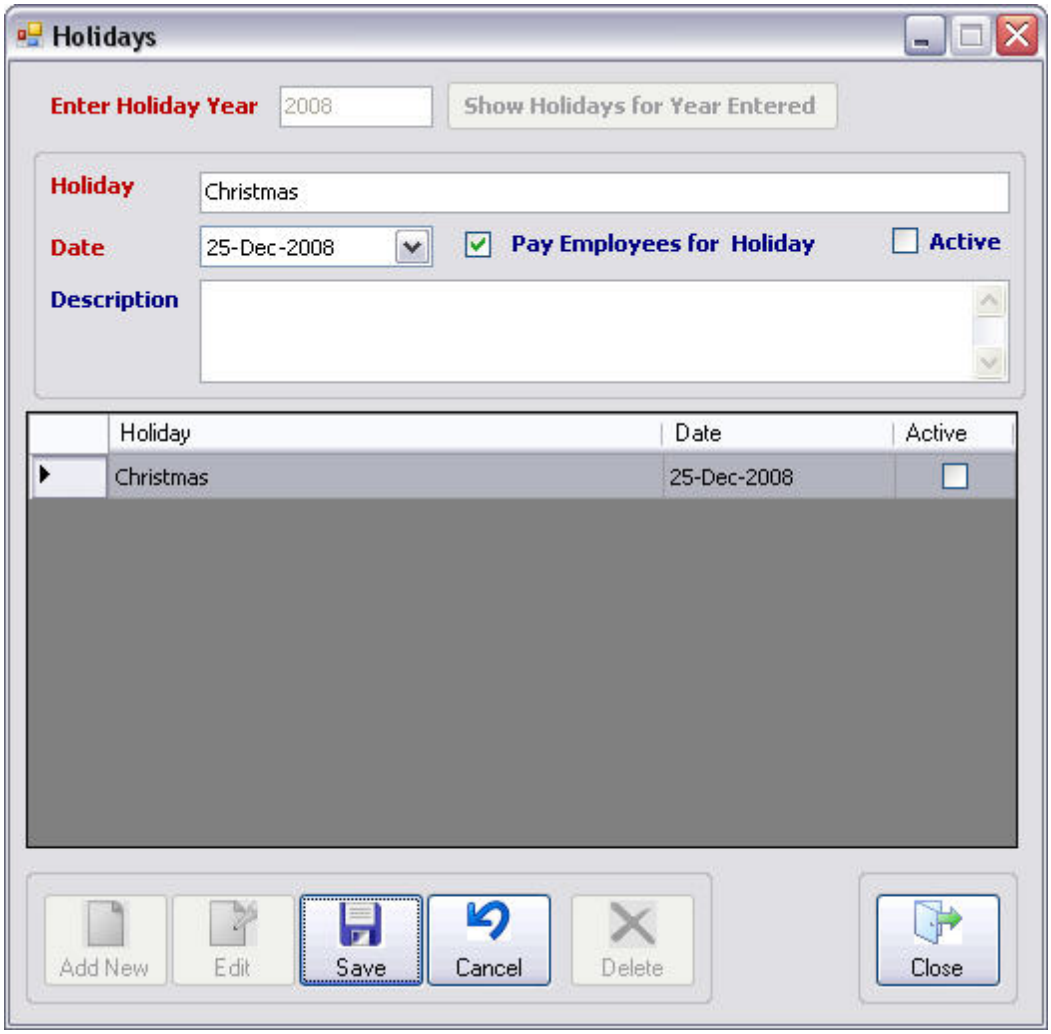
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



4.4.8.3 Holidays

This form maintains a list of National holidays and the dates on which they occur. For example, Easter Monday and Boxing Day.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

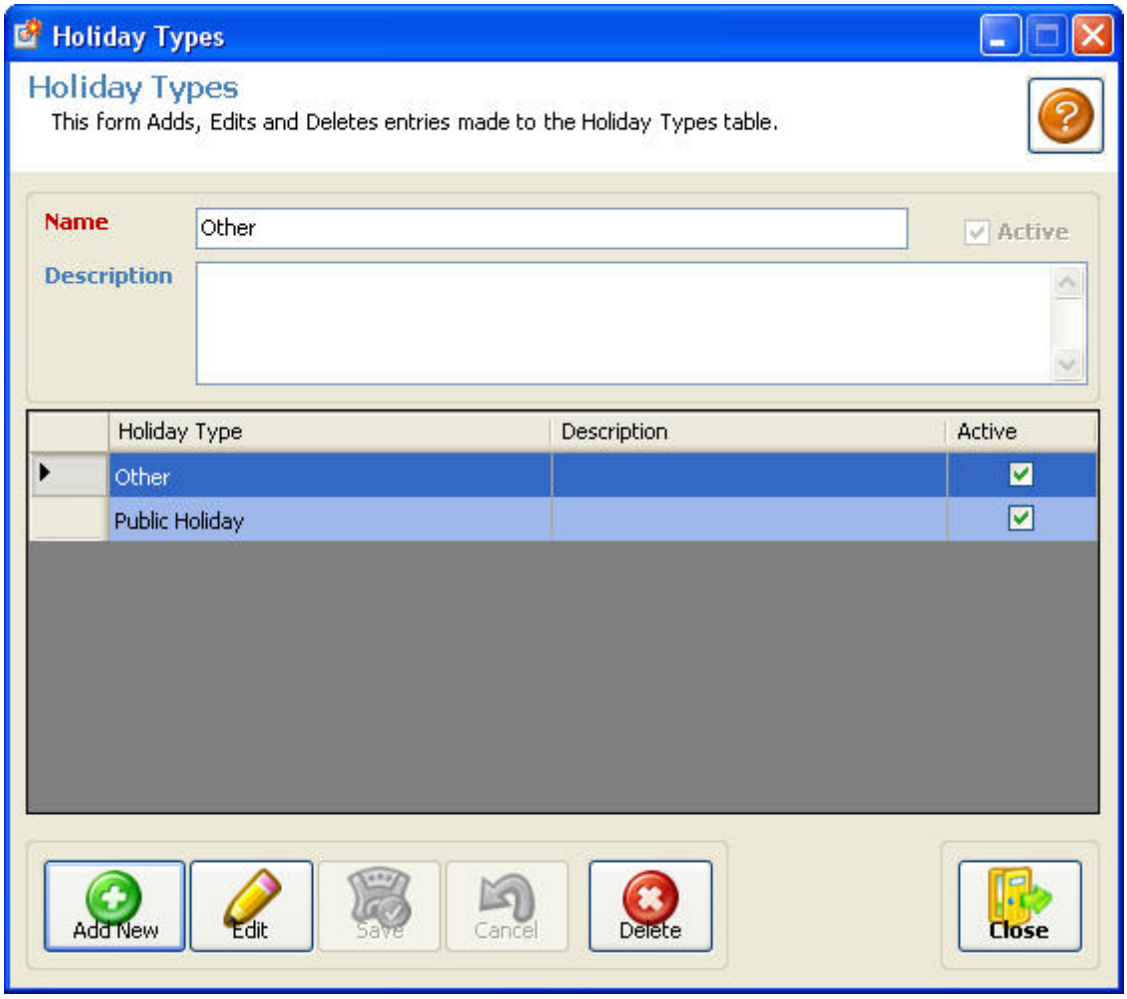


4.4.8.4 Holiday Types

This form maintains a list of the various types of holidays observed by the institution and the country. An example of this may be National Holiday.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

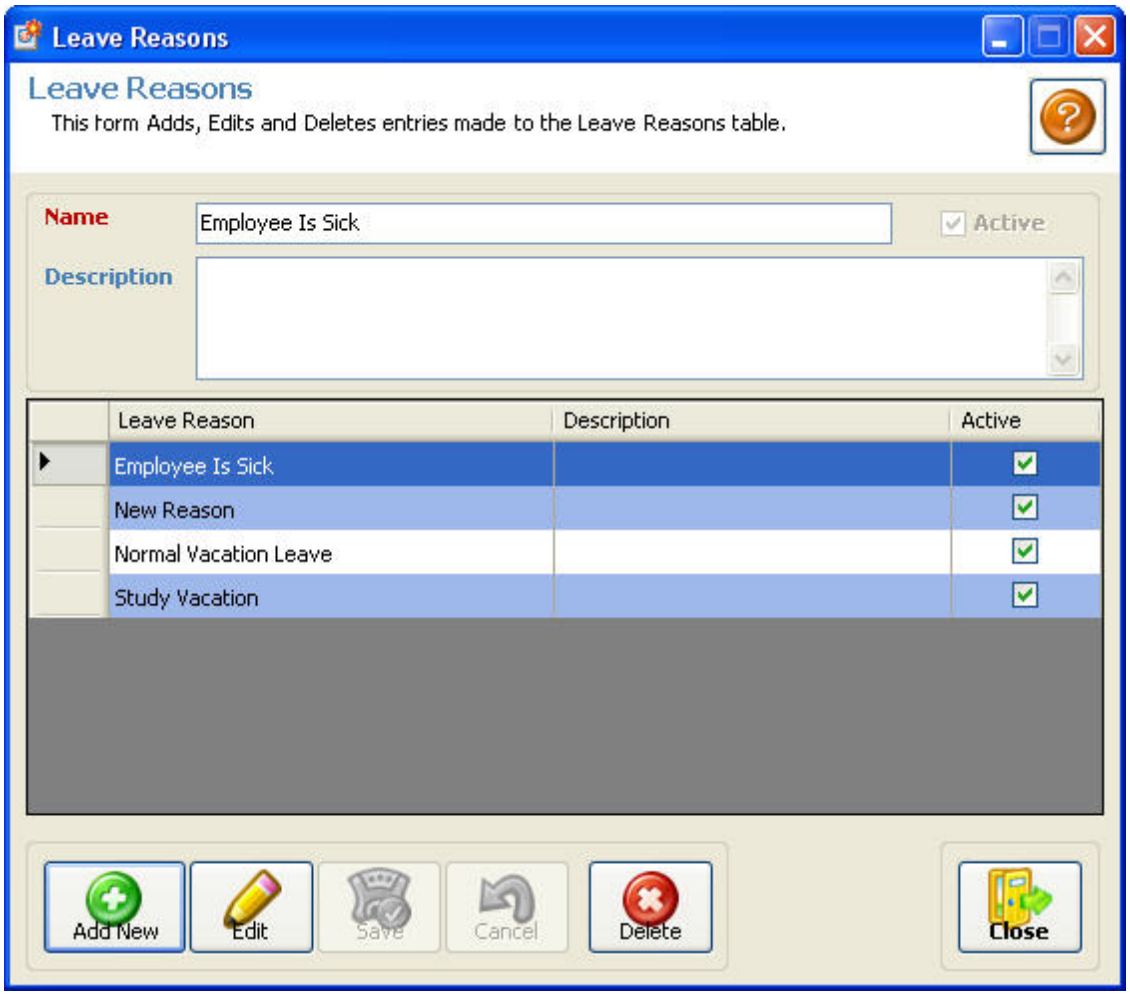
© 2014 Enter your company name



4.4.8.5 Leave Reasons

This form maintains a list of reasons for an employee taking a leave of absence from the organization. An example of this may be a death in the family.

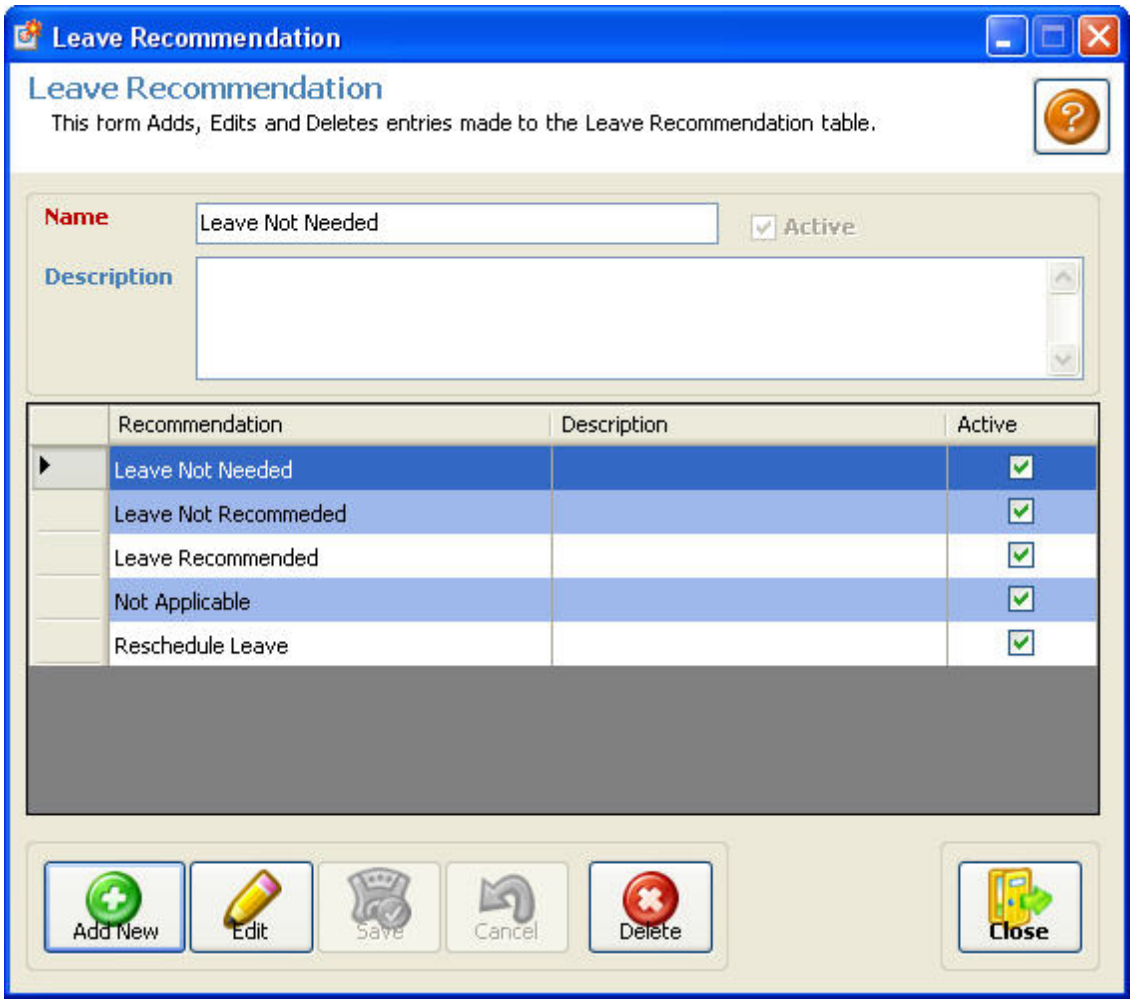
Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!



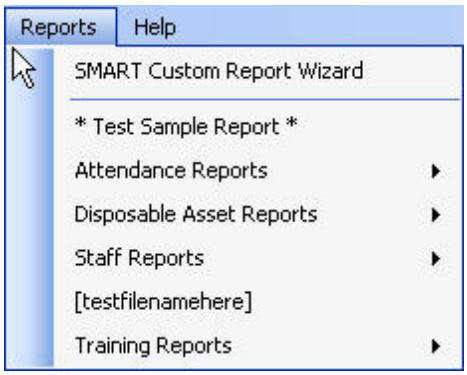
4.4.8.6 Leave Recommendations

This form maintains various recommendations offered to the employees on their application for leave. An example of this would be to reschedule the leave for a later date.

Refer to **HOW TO ADD EDIT OR DELETE RECORDS** for further instructions on data entry!

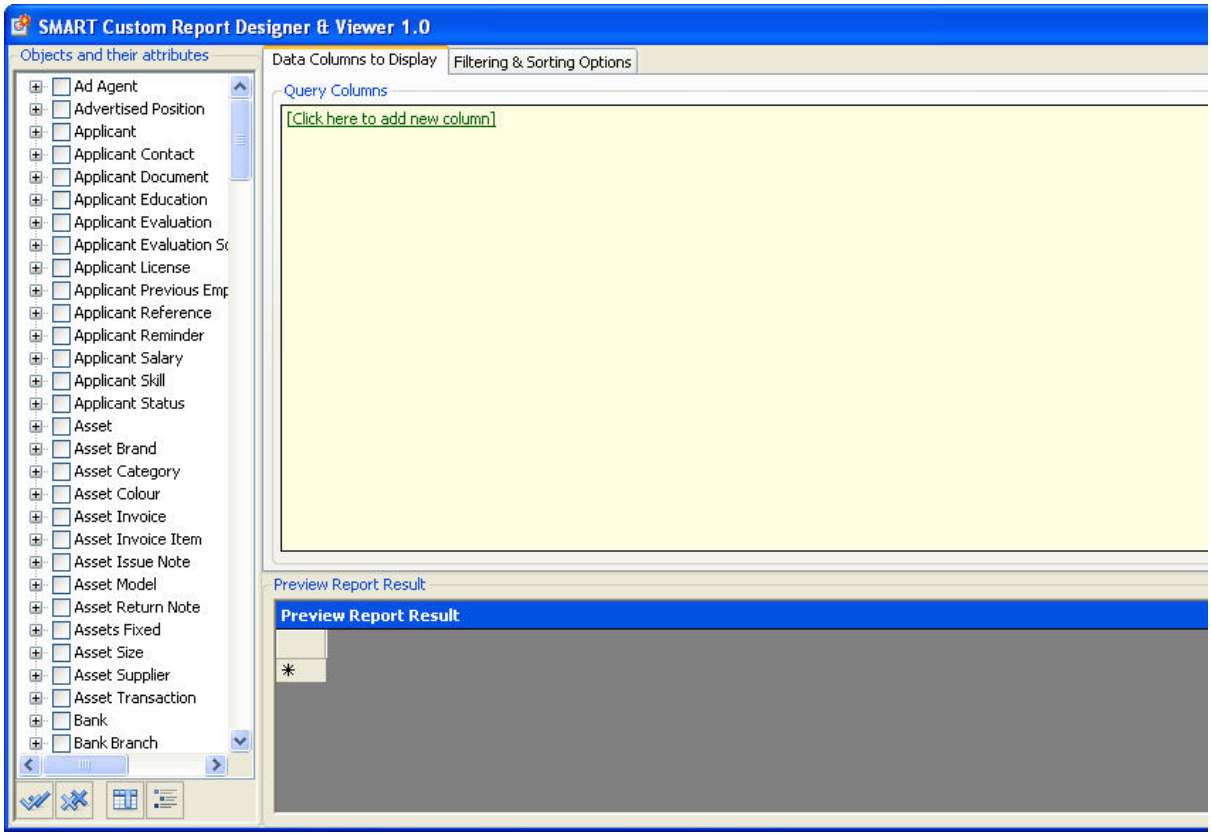


4.5 Reports



© 2014 Enter your company name

4.5.1 SMART Report Custom Wizard



4.5.2 Attendance Reports

Related Topics

Employee Leave Balance
Employee Leave Balance Query
Leave Application

© 2014 Enter your company name

Leave Application Roster
Leave Summary Sheet
Leave Transaction Log

4.5.2.1 Employee Leave Balance

4.5.2.2 Employee Leave Balance Query

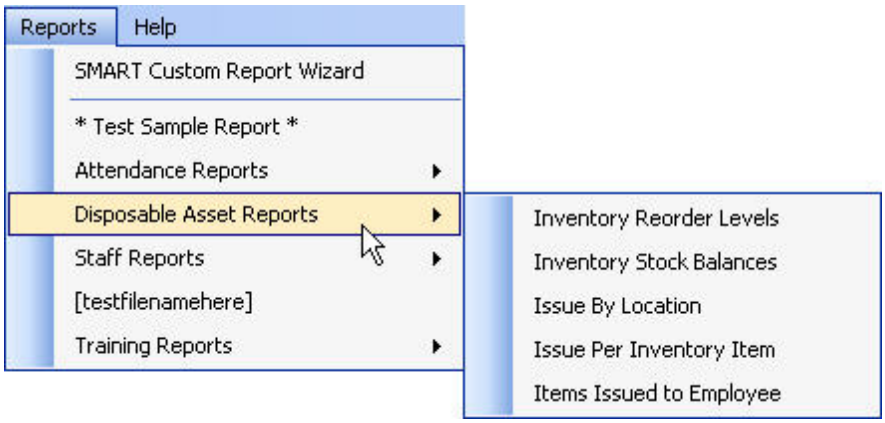
4.5.2.3 Leave Application

4.5.2.4 Leave Application Roster

4.5.2.5 Leave Summary Sheet

4.5.2.6 Leave Transaction Log

4.5.3 Disposable Assets Report



Related Topics

Inventory Reorder Levels
Inventory Stock Balances
Issue by Location
Issue per Inventory Item
Items issued to Employee

© 2014 Enter your company name

4.5.3.1 Inventory Reorder Levels

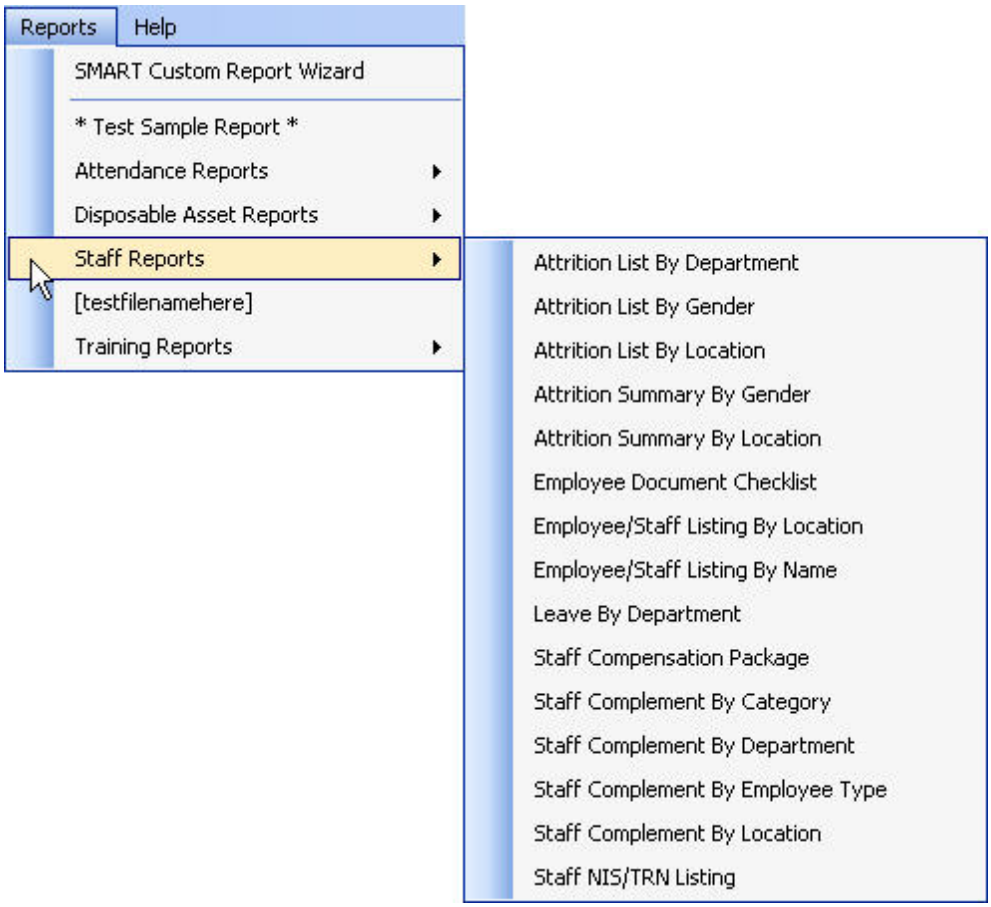
4.5.3.2 Inventory Stock Balances

4.5.3.3 Issue By Location

4.5.3.4 Issue per Inventory Item

4.5.3.5 Items Issued to Employee

4.5.4 Staff Reports



Related Topics:

Attrition List By Dept

Attrition List By Gender
Attrition List By Location
Attrition Summary by Gender
Attrition Summary by Location
Employee Document Checklist
Employee Staff Listing by Location
Employee/Staff Listing by Name
Leave by Department
Staff Compensation Package
Staff Complement by Category
Staff Complement by Department
Staff Complement by Employee Type
Staff Complement by Location
Staff TRN/NIS Listing

4.5.4.1 Attrition List by Department

4.5.4.2 Attrition List by Gender

Enter topic text here.

4.5.4.3 Attrition List by Location

Enter topic text here.

4.5.4.4 Attrition Summary by Gender

Enter topic text here.

4.5.4.5 Attrition Summary by Location

Enter topic text here.

4.5.4.6 Employee Document Checklist

Enter topic text here.

4.5.4.7 Employee /staff listing by Location

Enter topic text here.

4.5.4.8 Employee /staff listing by Name

Enter topic text here.

© 2014 Enter your company name

4.5.4.9 Leave by Department

Enter topic text here.

4.5.4.10 Staff Compensation Package

Enter topic text here.

4.5.4.11 Staff Complement by Category

Enter topic text here.

4.5.4.12 Staff Complement by Department

Enter topic text here.

4.5.4.13 Staff Complement by Employee Type

Enter topic text here.

4.5.4.14 Staff Complement by Location

Enter topic text here.

4.5.4.15 Staff TRN/NIS Listing

Enter topic text here.

4.5.5 Training Reports

Related Topics:

Training Participation by Class
Training Participation by Deparment

4.5.5.1 Training Participation by Class

© 2014 Enter your company name

4.5.5.2 Training Participation by Department

© 2014 Enter your company name

5 Reference & Support

To get further assistance for issues not covered by this users manual, please visit the following address:
www.smarttechjm.com, click support and browse our help desk.