Business World User Guide
Business World for Line Managers

Shropshire Council

Embridge Consulting
Driving value from your business systems

Contents

1. General Information

1.1. Introduction

This manual has been written to help you work with the Training Administration element of Business World. As several services will be using Business World, this user guide is specific to the area for which it is written.

You must also be familiar with Microsoft Windows and understand workflow (which is covered in the E-Learning introduction courses).

1.2. Conventions in this document:

This manual uses icons to illustrate comments with the following purposes

Warning

Useful tips

Best Practice

Navigate to:

Personnel → Work schedule → Day type master file

[***] Key from the PC keyboard e.g. Press **[Tab]**

This User Guide covers:

- Personnel information
- Absences
- Competences
- Forms
- Activating substitutes
- Reports

2. Overview

Line Management is about the viewing and maintaining employees' personnel records, recording unplanned absences, using forms to manage resources and positions, and running reports.

Occupational Health Referrals may be raised by Line Managers. All OH Referrals are workflowed to an OH Advisor. The outcome of the referral is notified to the Line Manager in the form of a report and an Alert.

Resource and position changes can be raised on the relevant forms by Line Managers but the changes in BW are actioned by HR

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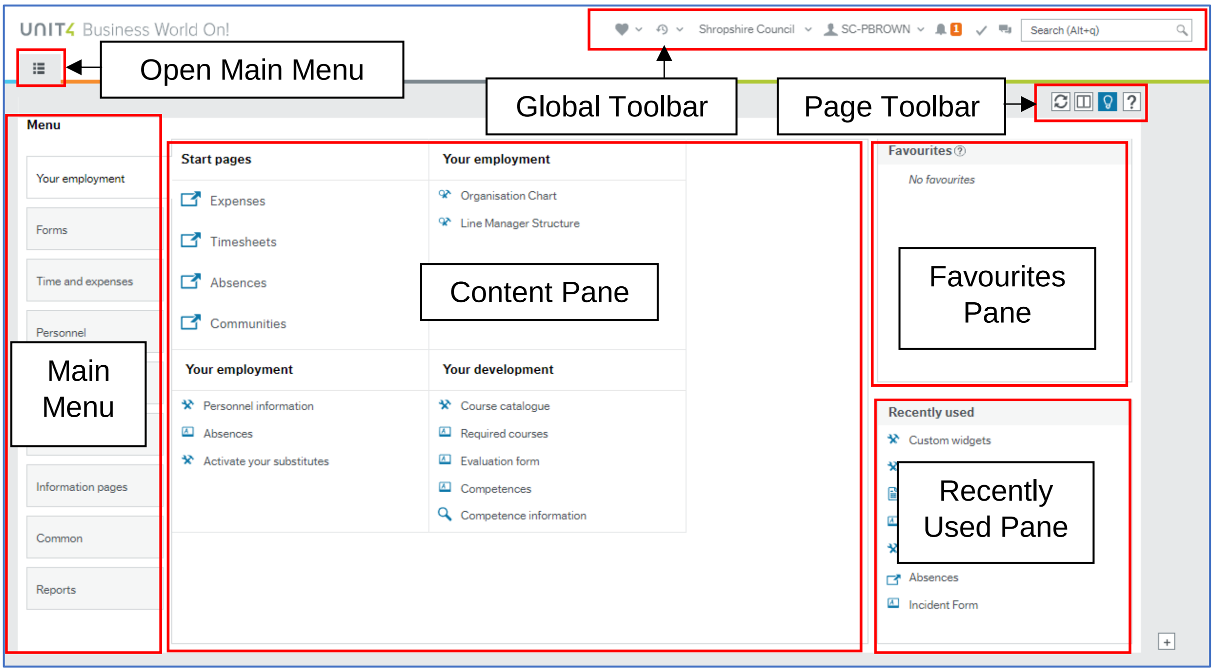
3. Navigation

3.1. The Employee Home Page

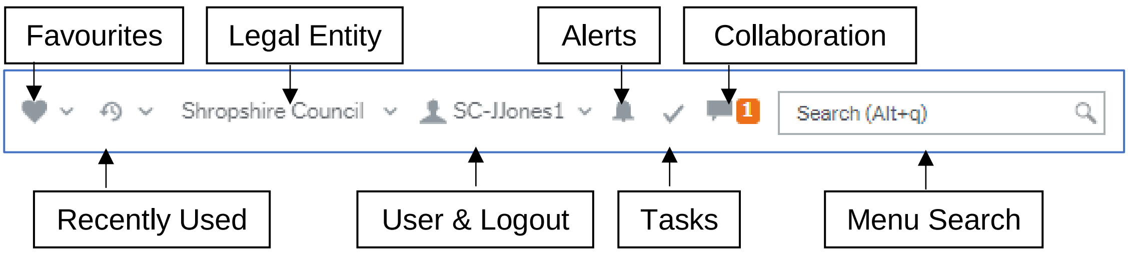
When you log on Business World Web you will ‘land’ on the Employee Home Page.



- **Open Main Menu** – opens the main menu from any page you are working in
- **Main Menu** – opens navigation options for the module selected
- **Content Pane** – is where the contents specific pages are opened and worked in
- **Favourites Pane** – contains shortcuts to any page you add to it
- **Recently Used Pane** - contains shortcuts to recently opened and closed pages

3.2. Global Toolbar

The Global Toolbar is visible from everywhere in BW.

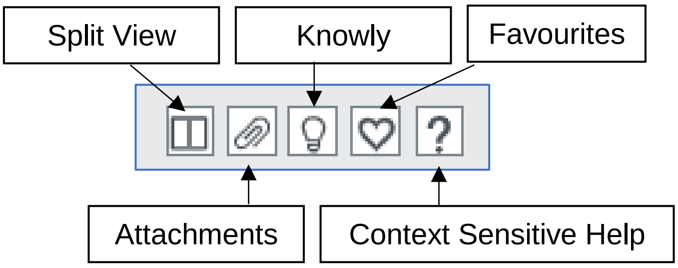


- **Favourites** – opens the list of favourite shortcuts
- **Recently Used** - opens the list of recently used pages
- **Legal Entity –** displays the organisation you are logged in to

- **User & Logout** – displays your user name and the drop-down contains options, including Logout
- **Alerts** – is where your alerts are accessed from. A white number on an orange background indicates how many alerts you have
- **Tasks** - is where your tasks are accessed from. A white number on an orange background indicates how many alerts you have
- **Collaboration** – is a messaging function for BW users that allows you to add screenshots and BW links
- **Menu Search** – allows you to search for, then open screens

3.3. Page Toolbar

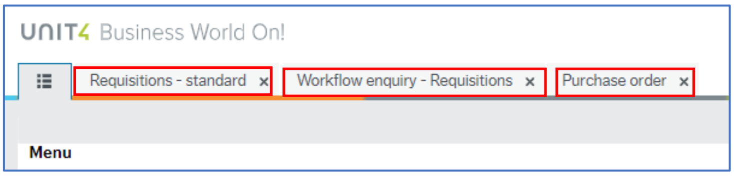
The Page Toolbar icons will change to reflect the open screen.



- **Split View** – allows two screens to be open at the same time
- **Attachments** – allows files to be added to records
- **Knowly** – is a means of sharing knowledge with other users or recording notes for yourself
- **Favourites** – opens the list of favourite shortcuts
- **Context Sensitive Help** – opens help for the screen that is active

3.4. Screen Tabs

It is possible to have multiple screens opened in BW and each will open in its own tab.

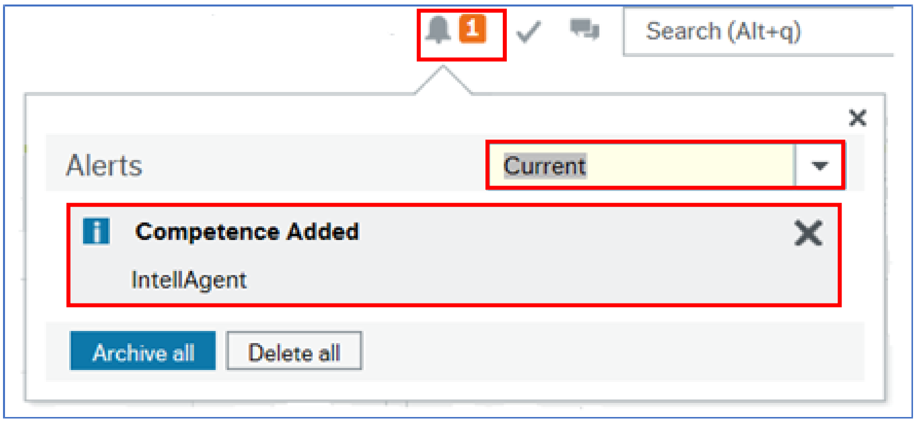


Click on a screen tab to make it the active screen or click on its cross to close it.

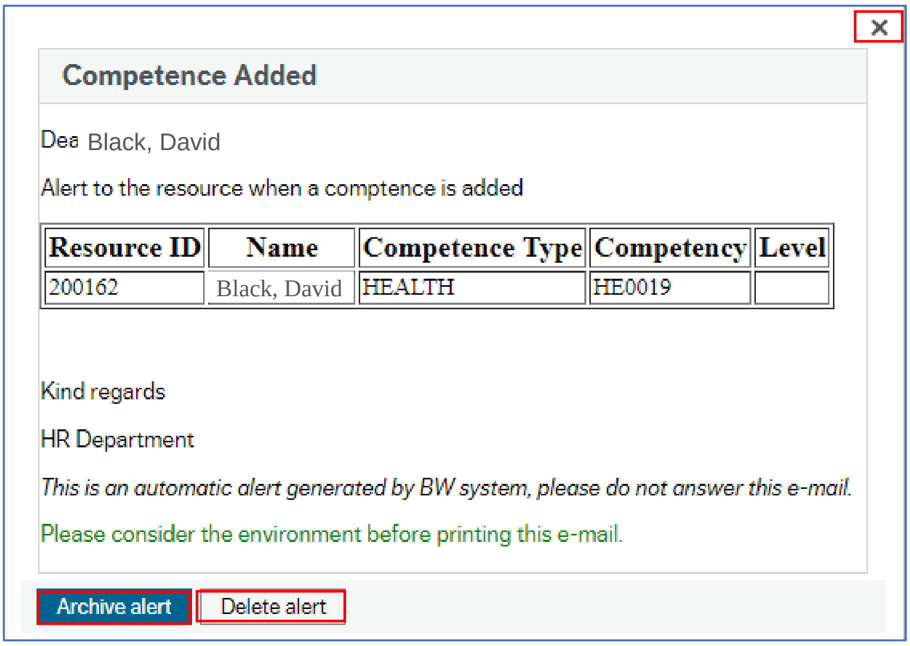
3.5. Alerts

An **Alert** provides information that may be useful to you. They do not require actioning to progress anything, but they may be related to an action or triggered by an action which has taken place in a Workflow. An example would when a competence is added, you will receive an alert to tell you which competence has been added.

If you have any **Alerts**, a number will appear telling you how many.



1. Click **Alerts**
2. Click a specific alert to see more details


Competence Added

Dea Black, David

Alert to the resource when a comptence is added

Resource ID	Name	Competence Type	Competency	Level
200162	Black, David	HEALTH	HE0019	

Kind regards

HR Department

This is an automatic alert generated by BW system, please do not answer this e-mail.

Please consider the environment before printing this e-mail.

Archive alert
Delete alert

When you have read the information, you can:

- Close the popup window using the cross. This will keep the alert in the list
- Click **Archive alert**, to send the alert to the archive
- Click **Delete alert**

3.6. Tasks

3.6.1 Overview

Workflow Tasks are generated by BW according to a set of rules which are:

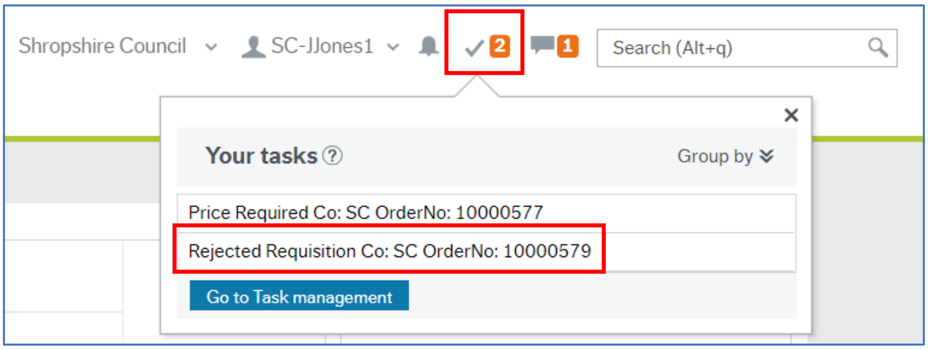
- Specific to each type of transaction
- Specific to each approval level

The Workflow Tasks ensure that:

- The correct person or team is notified of an action requirement.
- A link is provided to open the record requiring action
- The relevant action options are available

The example below is for a Rejected Requisition task.

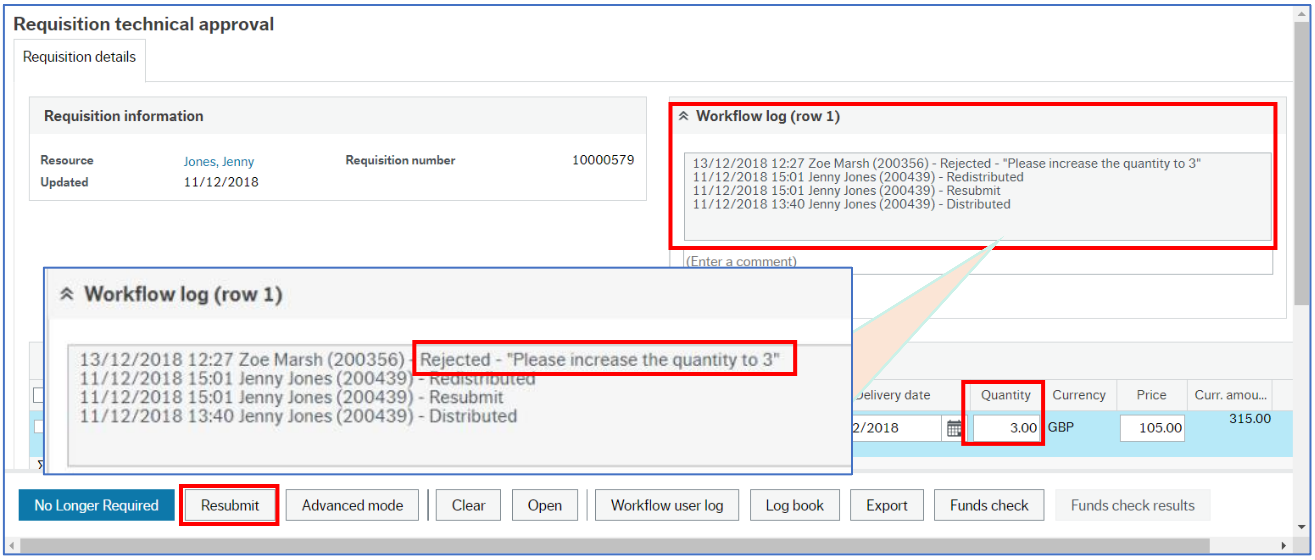
1. Click **Tasks**



You can click an individual line to open a specific task or you can click **Go to Task management** to open the task manager with all tasks available.

3.6.2 Action a Specific Task

1. Click the required task



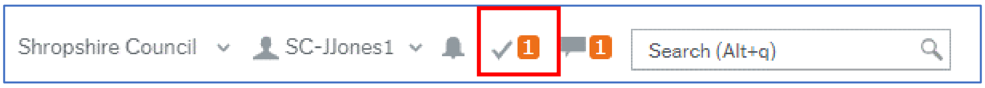
2. Read the **Workflow Log**. Rejected requisitions must always have a reason entered:

- Click **No Longer Required** if the requisition, or product line, is to be cancelled or
- Enter the changes and click **Resubmit**

The Success popup will open.

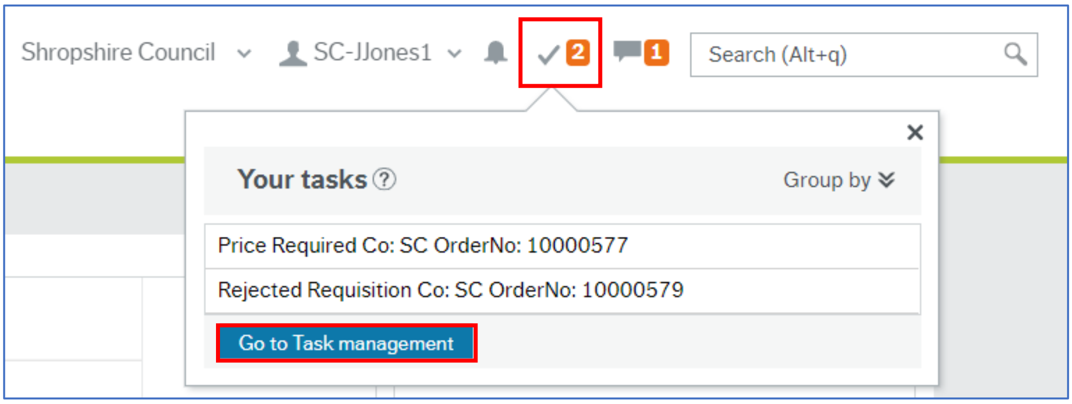
3. Click **OK**

The number of outstanding Tasks is reduced.

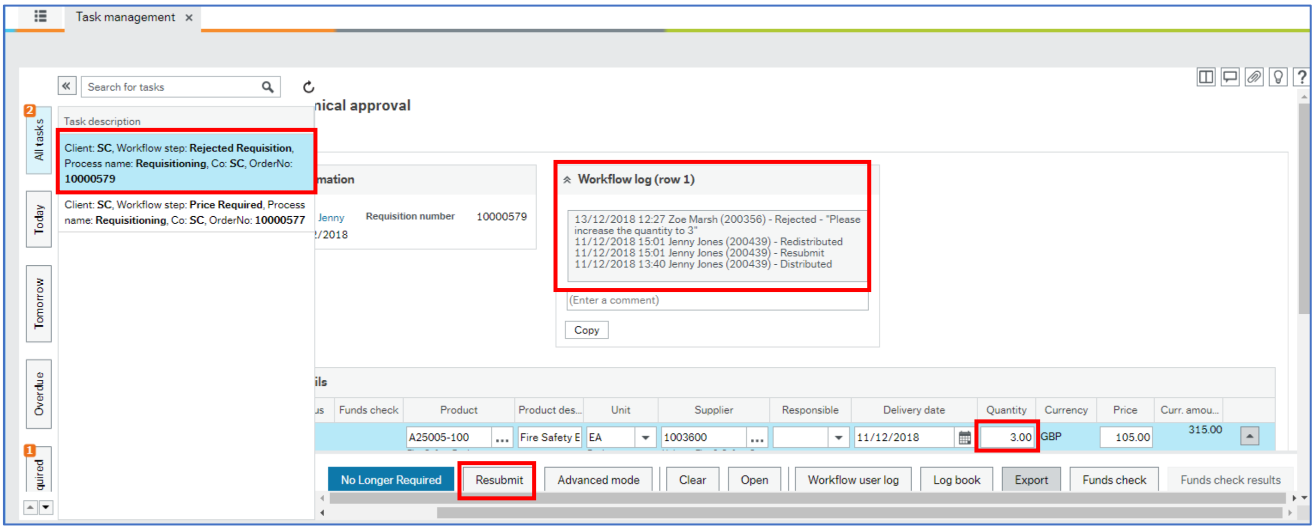


3.6.3 Action a Task from the Task Manager

1. Click **Tasks**



2. Click **Go to Task management**
3. Select the Task type – in this case **Rejected Requisition**
4. Click the required task



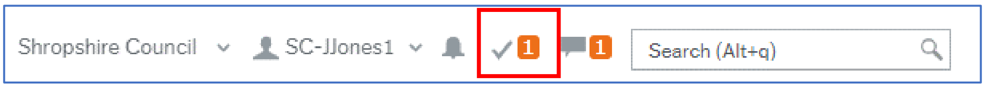
5. Read the **Workflow Log**. Rejected requisitions must always have a reason entered:

- Click **No Longer Required** if the requisition, or product line, is to be cancelled or
- Enter the changes and click **Resubmit**

The **Success** popup will open.

6. Click **OK**

The number of outstanding Tasks is reduced.

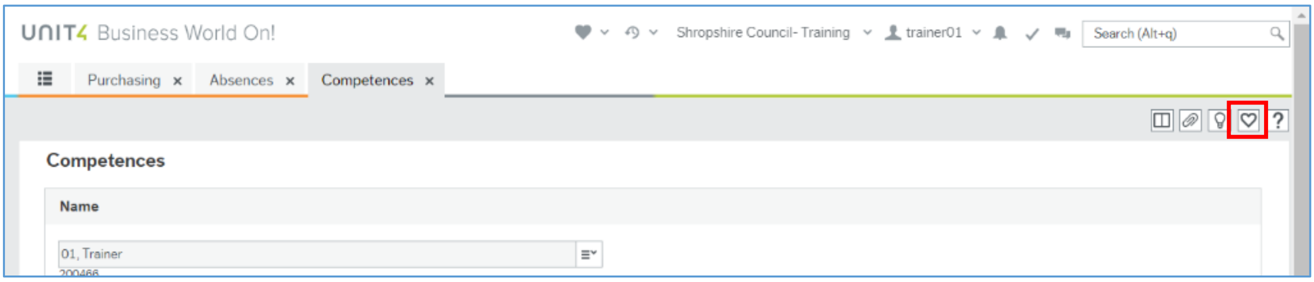


3.7. Favourites

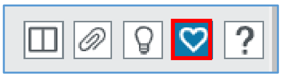
Favourites is a means of creating shortcuts to the screens you use most often.

3.7.1 Add to Favourites

1. Navigate to the required screen



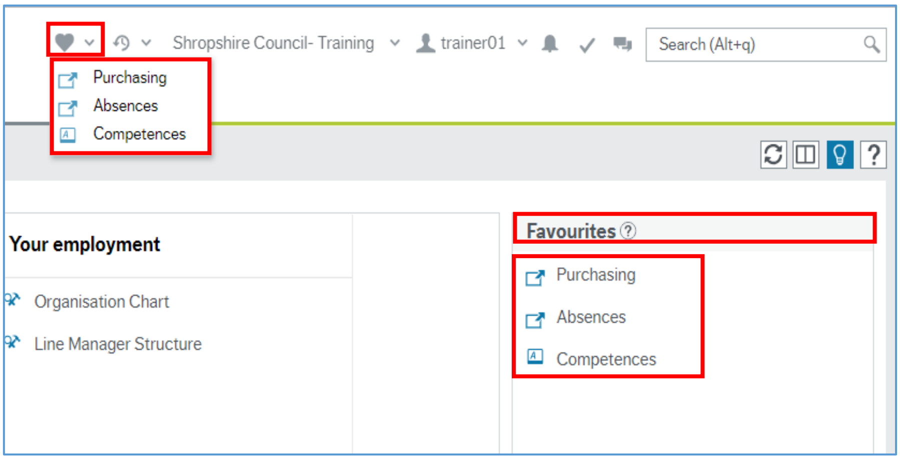
2. Click **Mark as favourite**



The icon will become blue. Clicking it again will remove it from the favourites list.

3.7.2 View Favourites

Favourites can be accessed from the Home Page in two places.



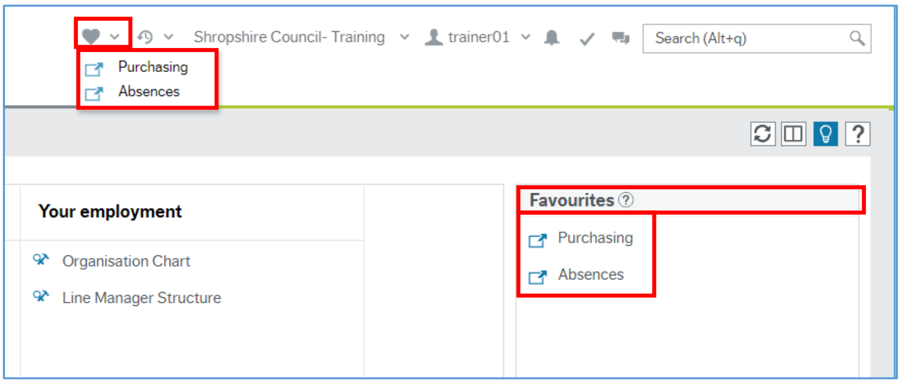
- The **Favourites** icon on the Global Toolbar produces a popup list of screen shortcuts
- The **Favourites** pane contains the same list of screen shortcuts

1. Click any of the links listed to open them

3.7.3 Remove from Favourites

1. Open the screen to be removed from Favourites

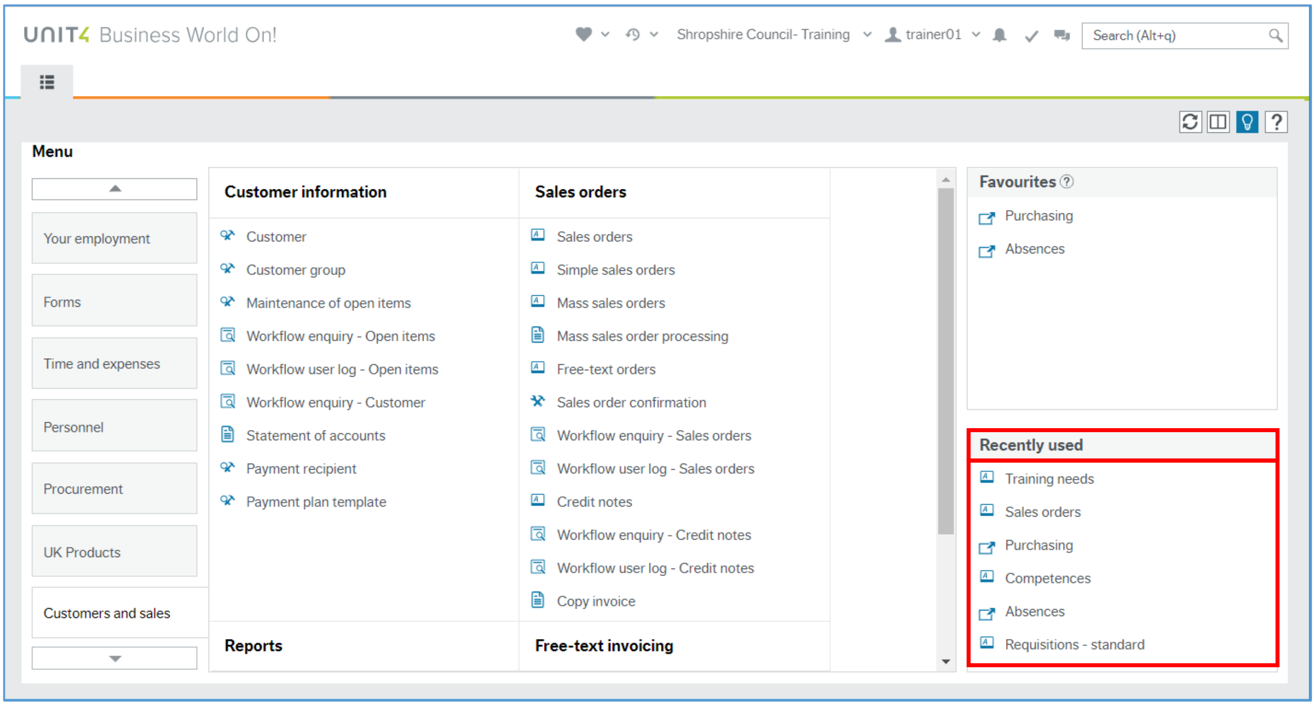
2. Click the blue **Remove from favourites** icon



In this example the Competences screen has been removed from Favourites.

3.8. Recently Used

The **Recently used** pane is a list of shortcuts to the 20 most recently opened screens, whether or not they are in the Favourites pane.

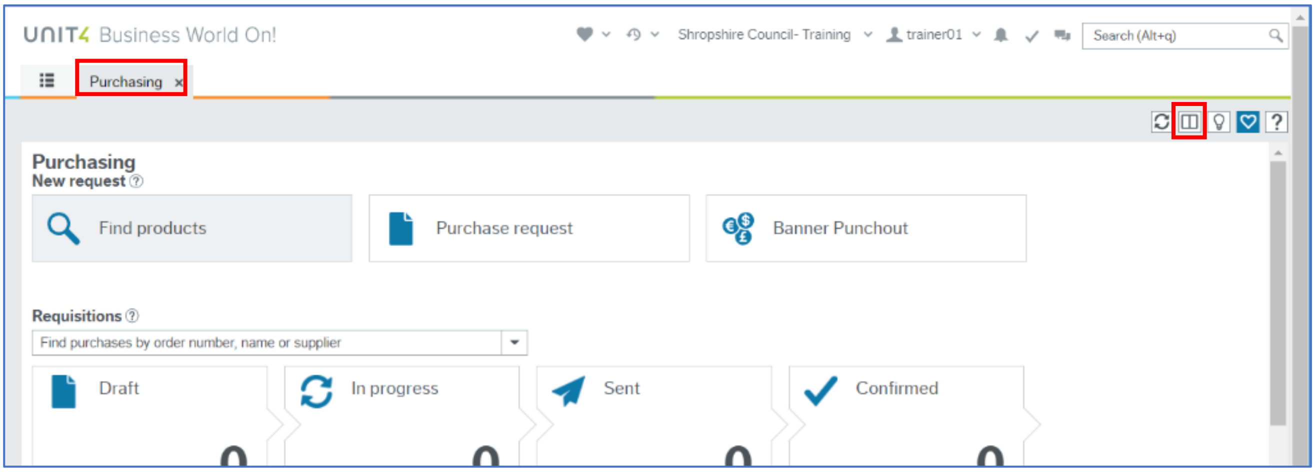


Each new screen that is opened is automatically added to the **Recently used** pane.

3.9. Split View

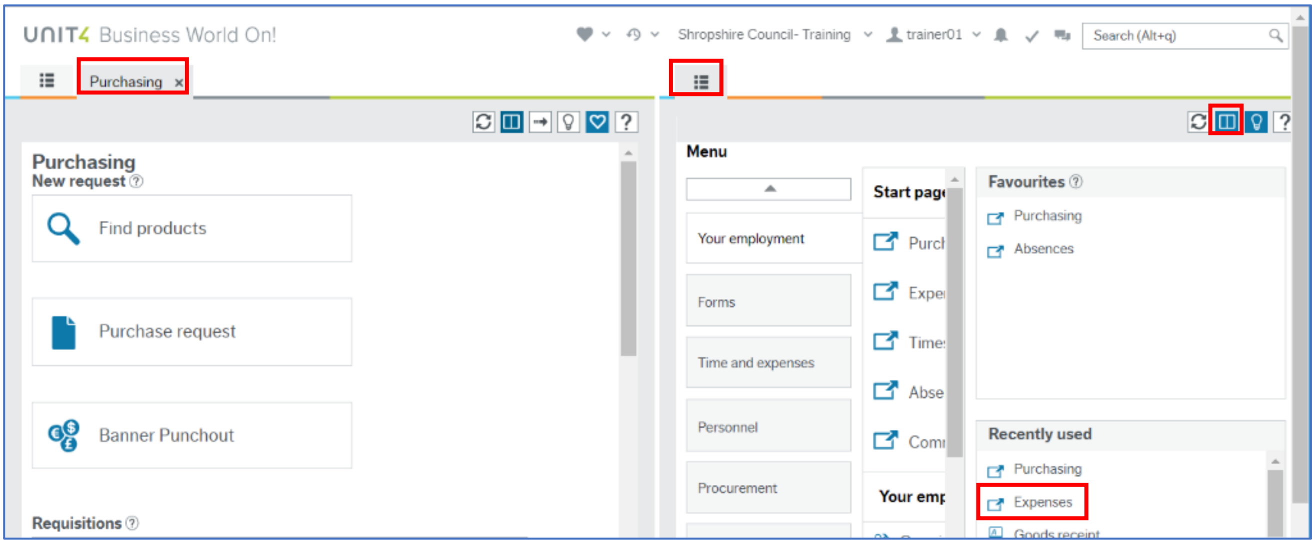
The **Split View** function allows you to have two screens open at the same time.

3.9.1 Open Two Screens

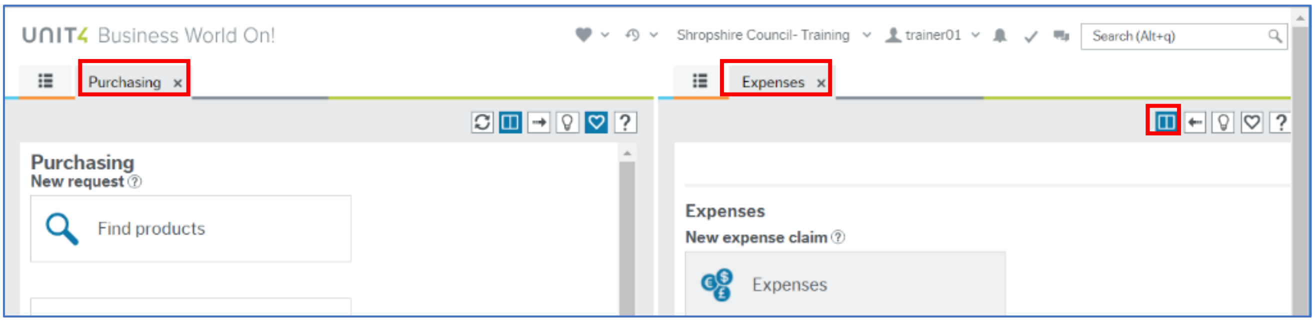


1. Open the first screen that you want, **Purchasing** in this example
2. Click **Split view**

The **Menu** is now open to the right of the selected screen and the split view icon is blue.



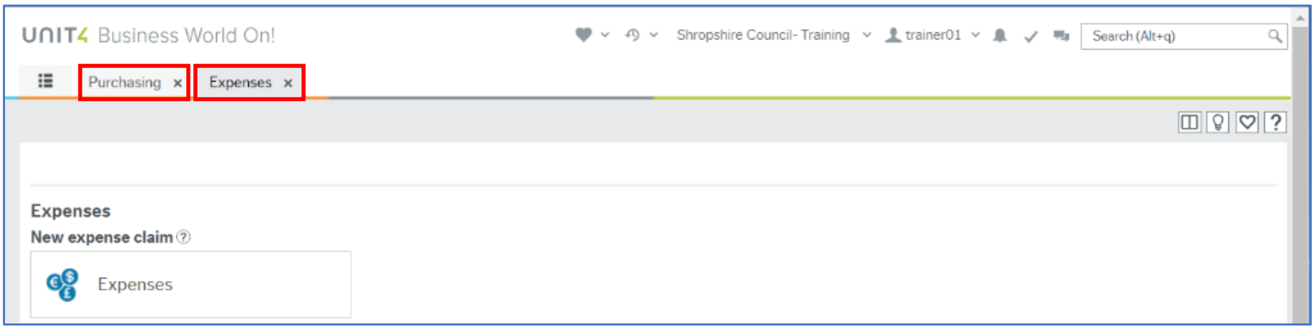
3. Select the next screen to be opened from the menu, **Expenses** in this example.



Both the **Purchasing** and **Expenses** screens are open at the same time.

3.9.2 Return to a Single Screen

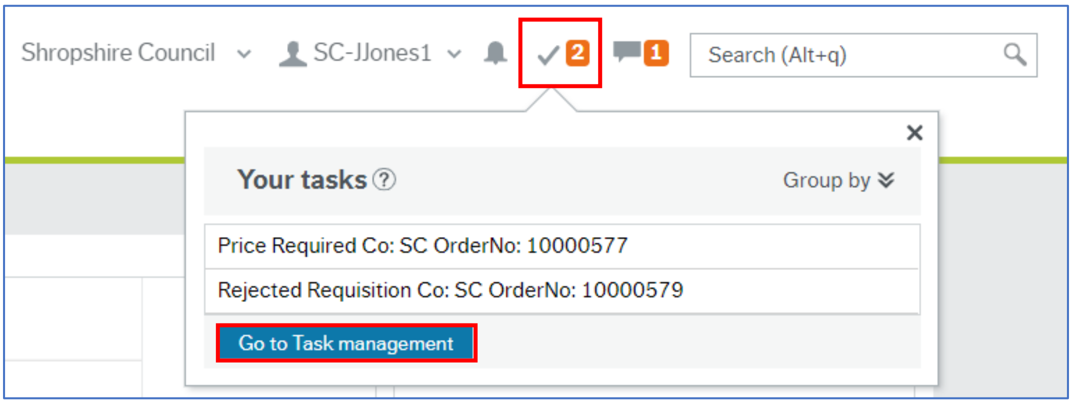
1. Click **Split view**



A single screen is open but there are now two Screen tabs available.

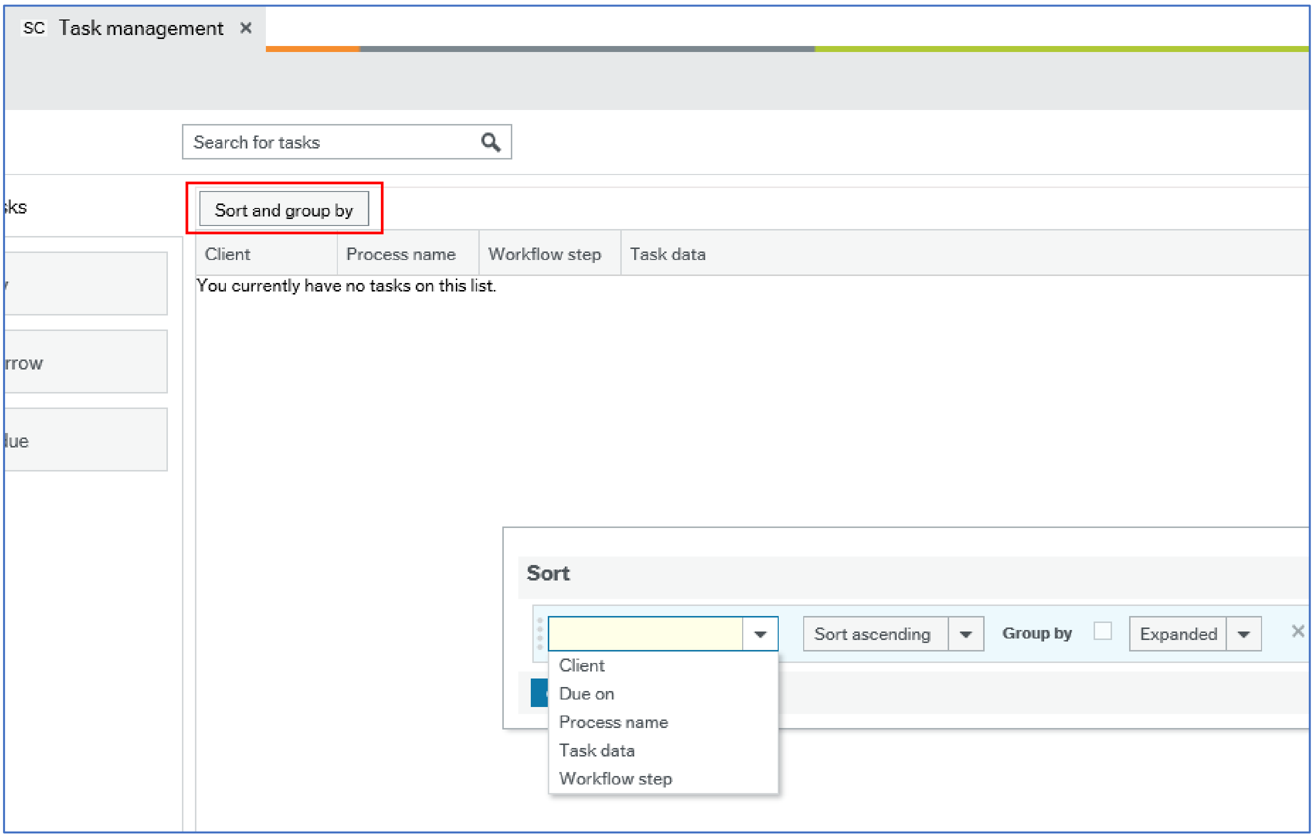
3.9.3 Task management

As touched on in section 3.6 Tasks can be organised and grouped to make them easier to sort and see which is a priority to action.



If you select task management or type this into the search bar, you will be taken to the task management window

Once in Task management click on “Sort and Group by” to perform a more detailed sort.



If this isn't required you can use the tabs down the left of the screen to select which workflows you wish to work through by element type.

3.10. What sort of tasks could your receive?

As a Line Manager you will receive many tasks, some of the more common tasks will be:

- Annual leave requests
- Timesheet
- Expenses
- Forms

4. Personnel and Your Employee Records

The Personnel section is where the details of all employees are held. It is the primary HR record. It is also visible to Payroll/HR staff, as well as HR Business Partners and those with the appropriate HR Menu Access Roles in BW.

A slimmed down version of this screen is accessible to Line Managers and all employees where this screen is known as Your employees or Personnel information, respectively. All staff and Line Managers are expected to maintain certain information for themselves, such as the Diversity tab.

To see your own personnel information, navigate to:

Your employment → Your employment → Personnel information

To see your employees' information, navigate to:

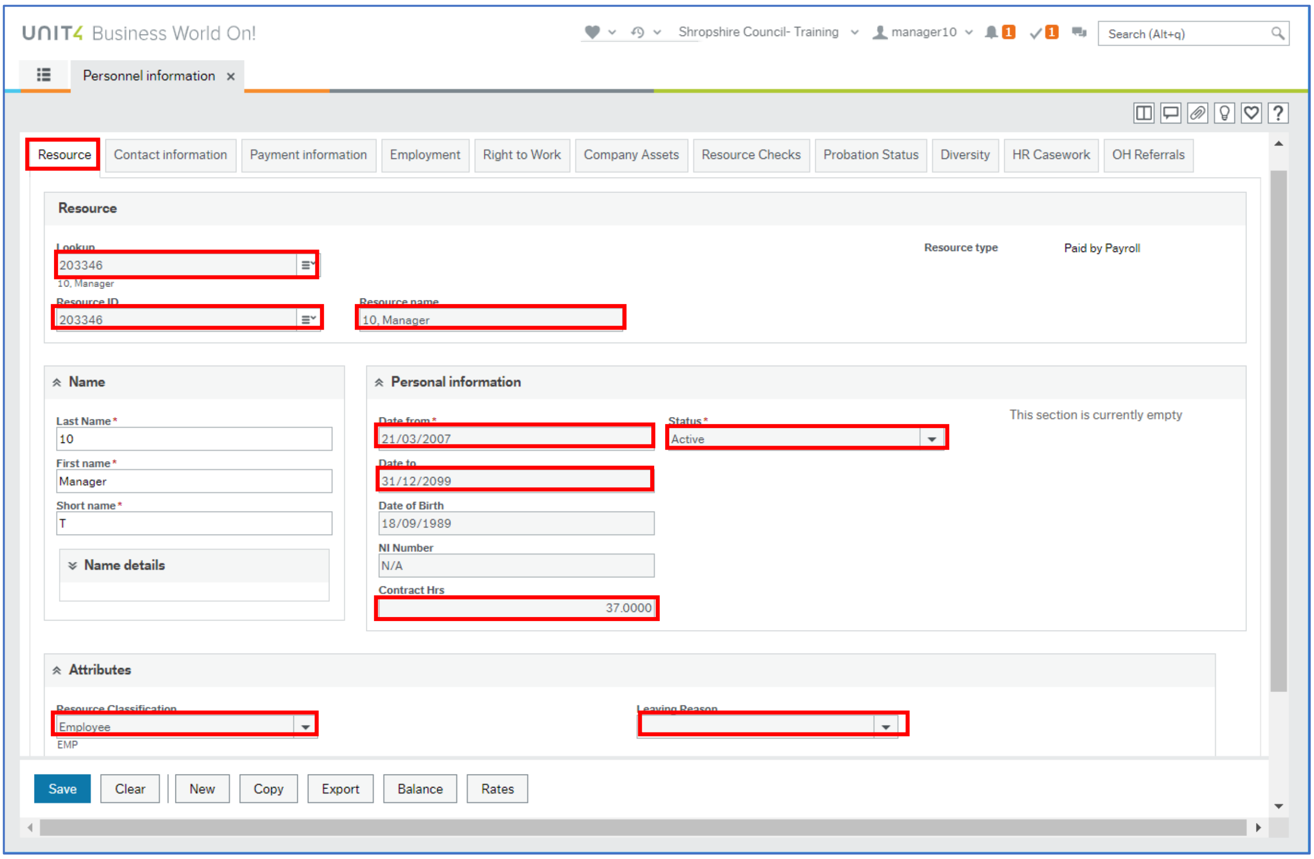
Personnel → Personnel → Your employees

Different user roles have different levels of access to the HR screens. The table below shows which screens can be seen by the different user types.

Tab	HR	Employee	Line Manager	OH
Resource	✓	✓	✓	✓
Contact information	✓	✓	✓	✓
Relations	✓	✓	✗	✗
Payment Information	✓	✓	✗	✗
Payroll	✓	✓	✗	✗
Employment	✓	✓	✓	✗
Personnel	✓	✓	✓	✗
Line Management	✗	✓	✓	✗
Action Overview	✓	✗	✗	✗
Right to Work	✓	✓	✓	✗
Company Assets	✓	✓	✓	✗
Resource Checks	✓	✓	✓	✗
Probation Status	✓	✓	✓	✗
Diversity	✓	✓	✗	✗
HR Casework	✓	✗	✗	✗
OH Referrals	✓	✗	✗	✓
OH Activity	✗	✗	✗	✓
Pension Auto-enrolment	✓	✓	✗	✗
Apprenticeship info	✓	✓	✗	✗
School Workforce Census	✓	✗	✗	✗
SWC Curriculum	✓	✗	✓	✗

4.1. Resource Tab

This is the “header record‟ for the Resource Profile. It is used to capture basic information such as name, start and finish dates, birthdate, etc.

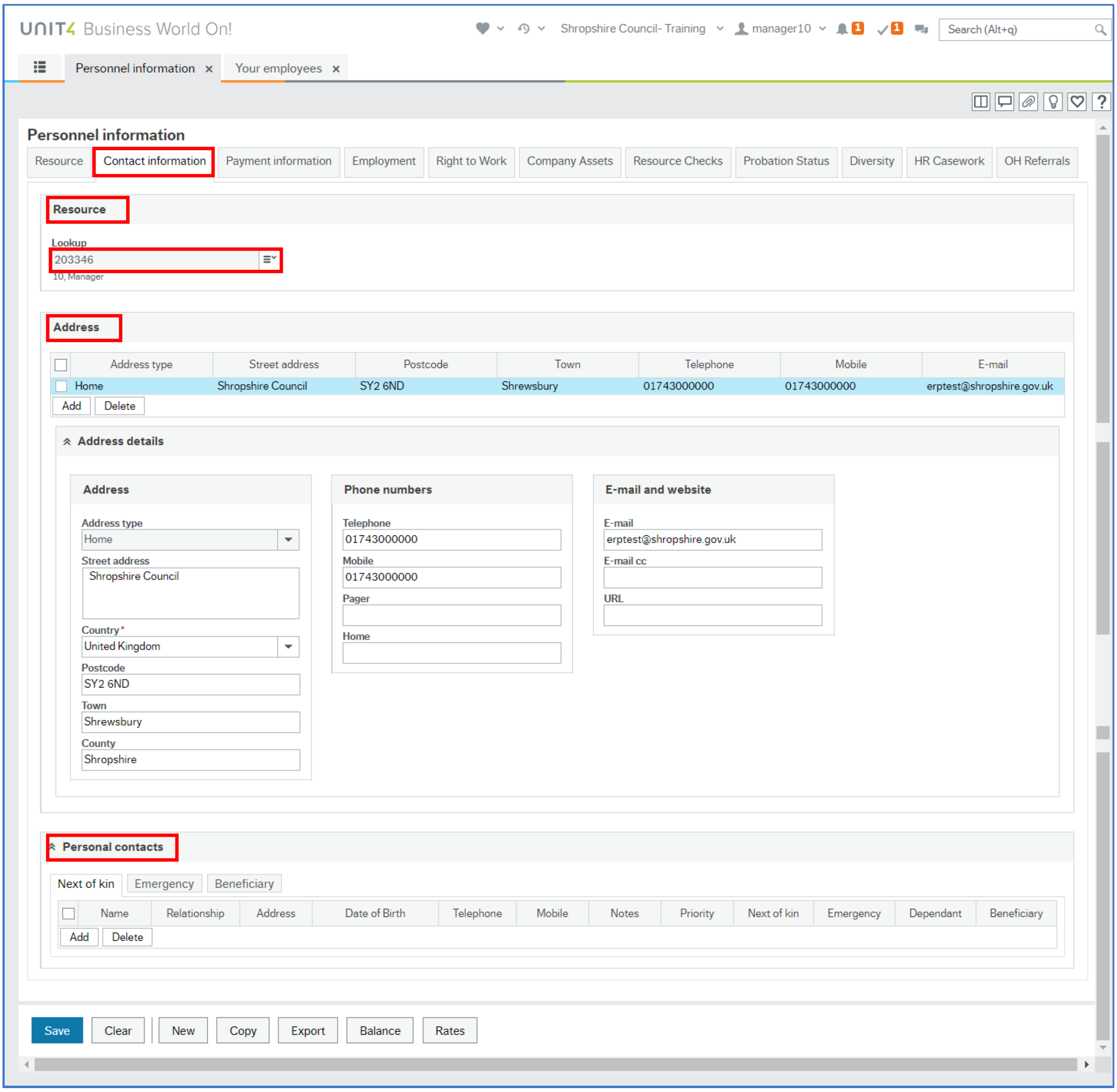


Below is a table of some of the fields that may need further explanation.

Field	**Description**
Lookup	The field to use Type-Ahead to look for a name (first or surname), in **Your employees** only. In **Personnel information** the resource cannot be changed from the person logged in
Resource ID/Name	The staff member’s HR/Payroll unique number and name
Date from	The date this resource started at the Council/Other entities
Date to	Defaults to 31/12/2099 when the end date is not known
Status	The options are: Active, Parked, Closed and Terminated. Resources in use must be Active. When a resource leaves, the **Date to** is completed and the status changed to Closed.
Contract Hrs	The contracted weekly hours
Resource classification	Employee, Members, Apprentice, Agency Temp etc. in Your employees only
Leaving reason	Should be blank unless Status is closed

4.2. Contact Information Tab

This tab is used to record all contact details for a resource. Every resource must have a **General** address which is used to record details of where they work and a **Home** address.



There are three sections on this tab:

- **Resource** – The field to use Type-Ahead to look for a name (first or surname), in **Your employees** only. In **Personnel information** the resource cannot be changed from the person logged in
- **Address** – Every resource must have a **General** address which is used to record details of where they work and a **Home** address
- **Personal contacts** – this section has three tabs for **Next of Kin**, **Emergency** and **Beneficiary** contact details

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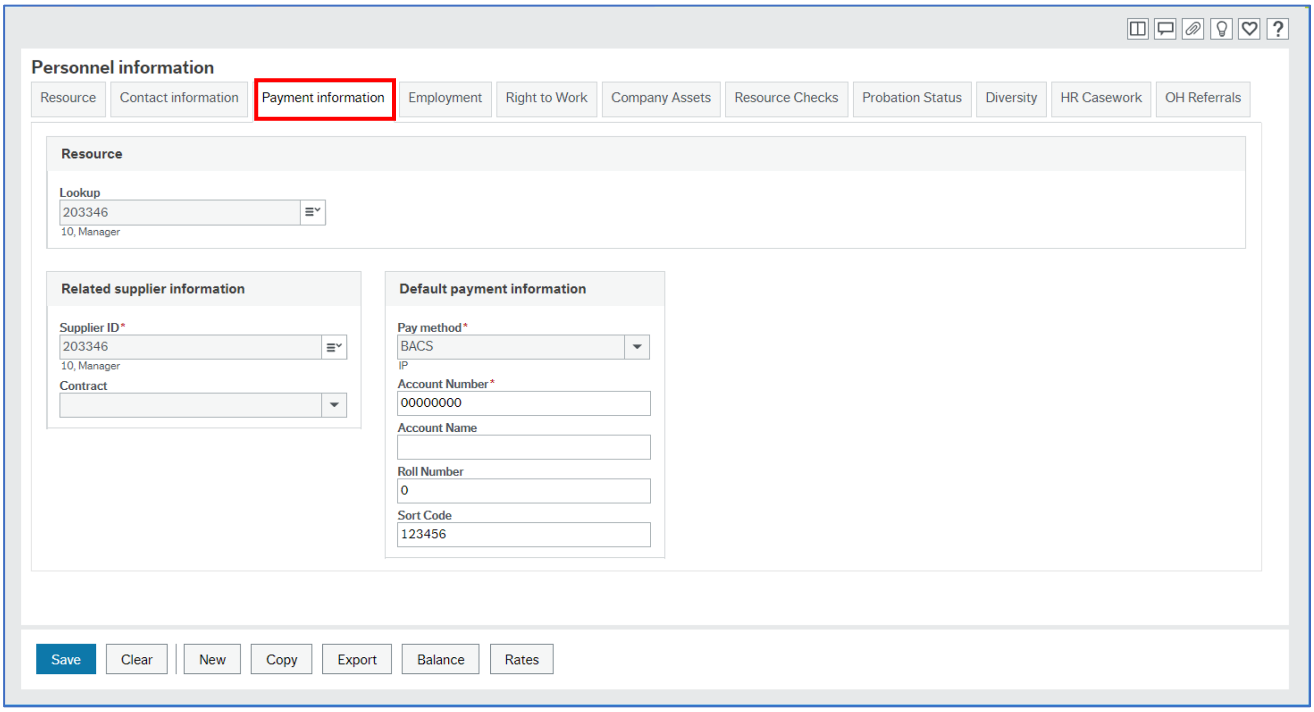
4.3. Payment Information Tab

Seen in Personnel information only

This tab is where the personal bank details for the resource are kept. It is added when the person starts as part of the starter details and initial creation process. It can be amended by the resource.

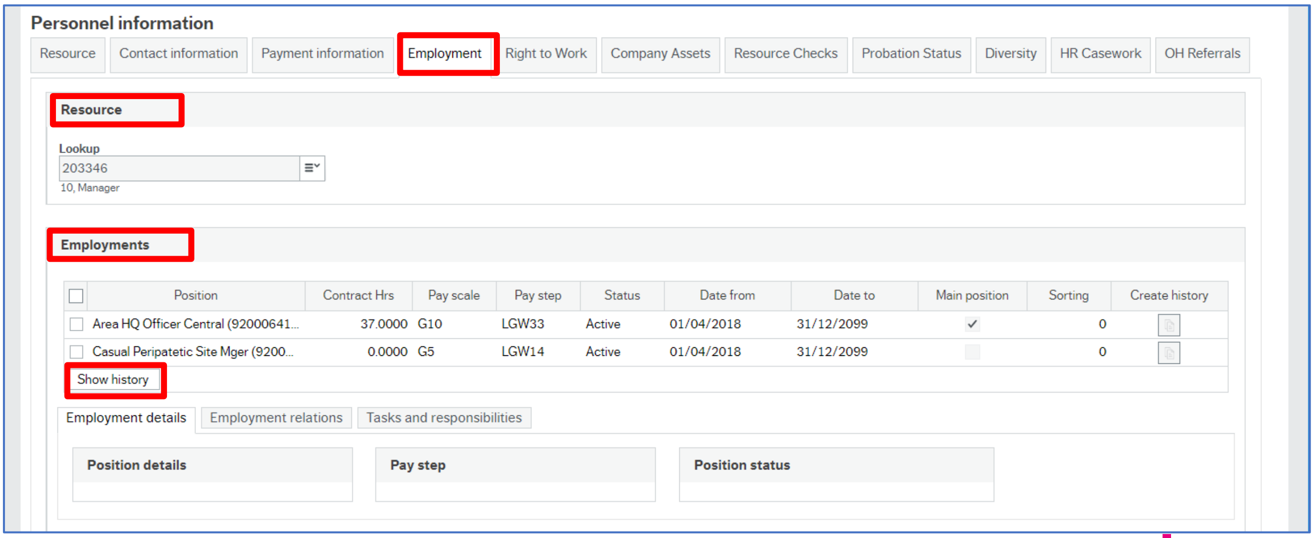


4.4. Employment Tab

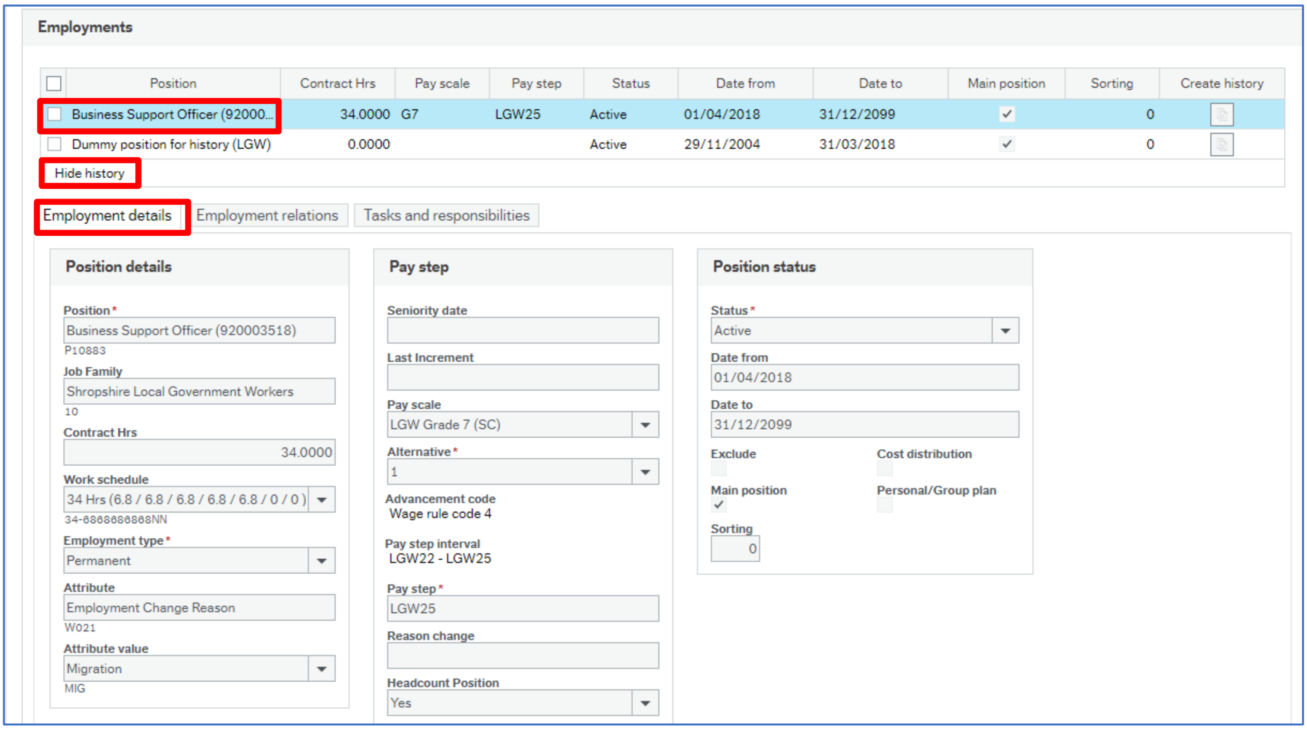
This is the screen that links a resource to a position.

When creating a new resource, or adding a position to an existing resource for the first time, the fields in this screen will be blank. Once a position is linked to a resource, the current and main position details will be displayed when this screen is first accessed.

The screen has two sections. An upper section in which the data relating to the main position is displayed in row form, and a lower section in which the position(s) actual details and position history can be displayed.



1. Click on **Show history** to reveal previous Positions held by this resource



2. Click on the **Position description**, or the row, to reveal the bottom half of the screen's data

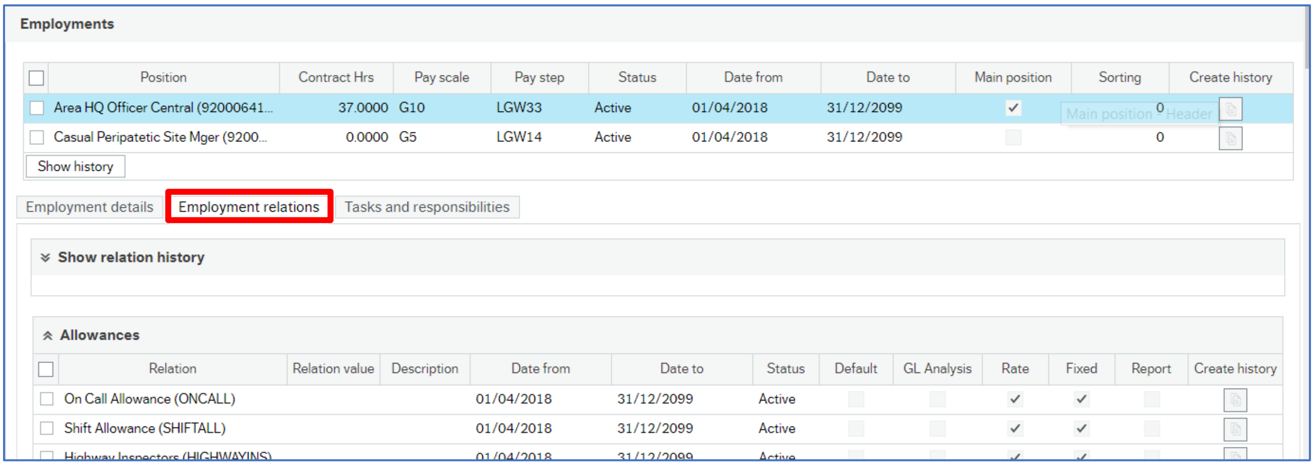
4.4.1 Employment Details Section

This shows detailed information for the selected position in the Employment section.

Field	Description
Position	This is the Position to which the resource is linked. Hover over this to reveal the Position ID code P******
Job Family	The corresponding Job Family will be displayed here (associated terms and conditions)
Contract hrs	This person's agreed hours in this Position
Work schedule	Every resource needs to be linked to a work schedule to correctly record their absence
Employment type	Whether this is a Permanent, Temporary acting up or Casual position etc. Many values exist- See dropdown arrow
Attribute	Relates directly to Attribute value field below. Acts as a heading only
Attribute value	The reason for change, should this position and data have been changed. Will show **Migration** if no change has happened
Pay scale	Shows the default values of pay scale, interval and interval pay step related directly from the Position register. Applies to all in this Position, but tailored individually here for the Resource should it be necessary
Reason change	Will show one of 2 reasons (Cost of Living Increase or Incremental Increase) should the Pay step have been altered
Position status	Shows the status of the position on the record. Options are: **Active**: Position is active and therefore in use.

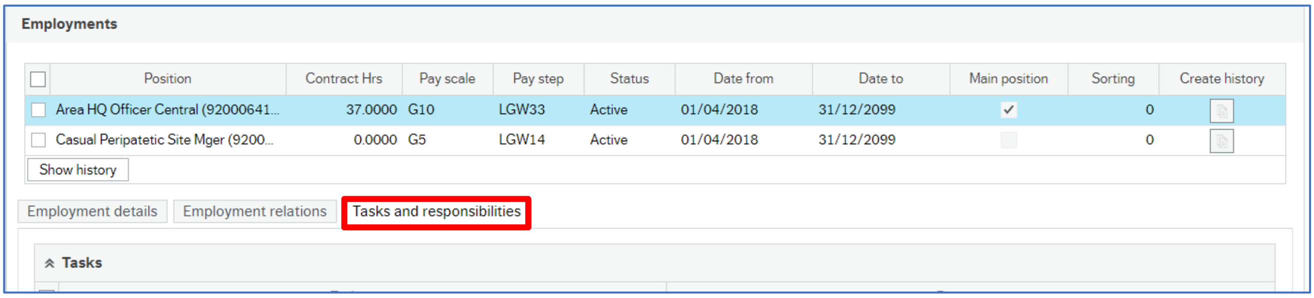
	Parked: Position temporarily closed. **Closed**: Position is closed, but can be re-opened. **Terminated**: Position is closed - cannot be re-opened.
Date from	The date that this person started in this Position only
Date to	Will show 31/12/2099 if this is the current Position, except where it is a known end date e.g. FTC. Historical positions will show when the person left that position
Main position	Ticked if this Position is their only or substantive Position. Should a person have more than one Position then only one is ticked if both are current or within date. Main Position is normally ticked for the Position with most hours attributed to it

4.4.2 Employment Tab Section



Employment relations are a sub-set of relations that relate to the person or resource in this Position and therefore different to the Relations tab.

4.4.3 Tasks and responsibilities Tab Section

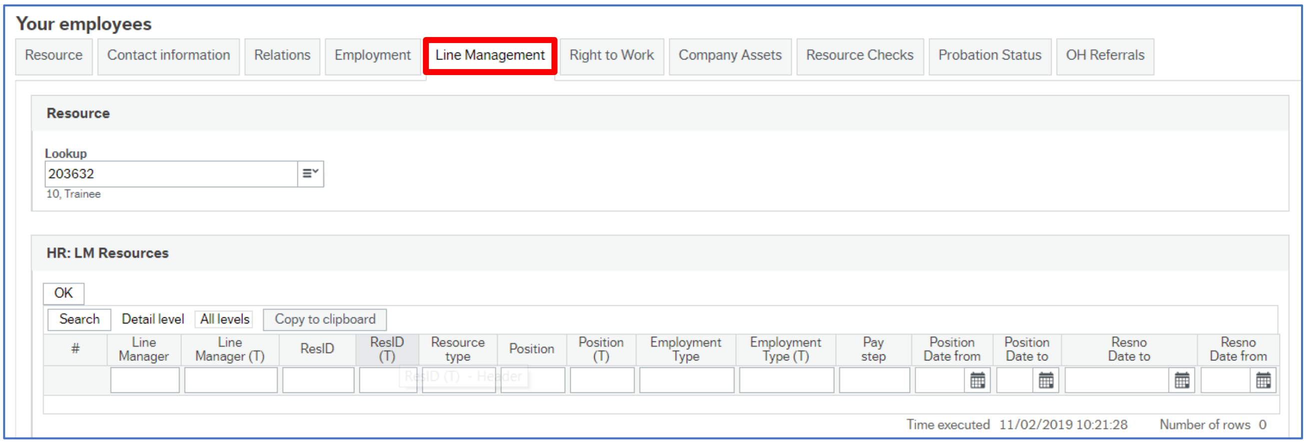


This tab is not used.

4.5. Line Management Tab

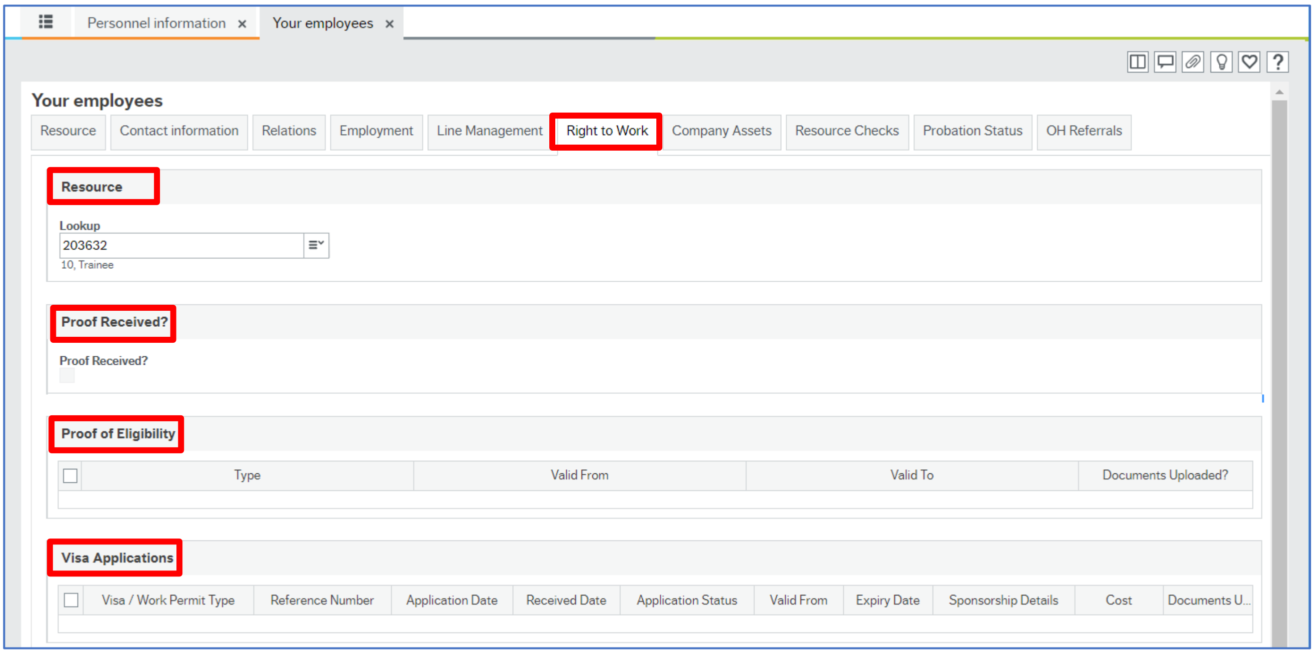
Seen in **Your employees** only

On this tab it's possible to see who the resource reports to other than their line manager. If the person only reports to the person viewing this screen, this will be blank.



4.6. Right to Work Tab

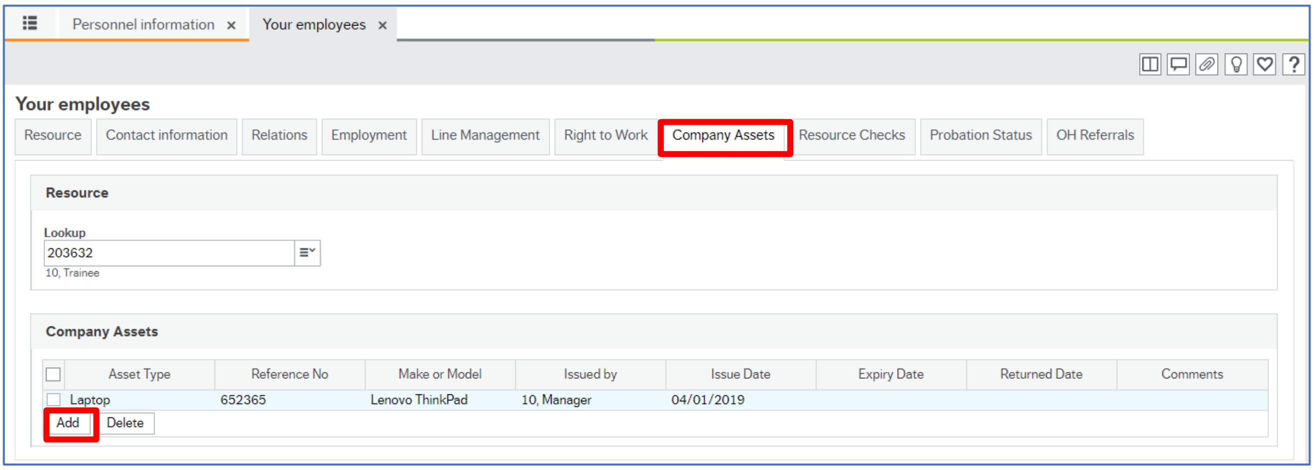
This screen is used to capture the right to work details relating to the resource.



- **Resource –** The field to use Type-Ahead to look for a name (first or surname), in **Your employees** only. In **Personnel information** the resource cannot be changed from the person logged in
- **Proof Received**- Declaration for a new starter or those on continuous checks that proof has been received
- **Proof of Eligibility –** Documentation that supports eligibility, such as Immigration status documents, Work permit, Certificate of Naturalisation etc.
- **Visa Application –** All types of Visa or Work Permit applications for applicable staff should be listed here

4.7. Company Assets Tab

This screen is used to monitor the company assets (mobile phone, laptop, key pass, PPE etc) and control the issue to, and return of assets form, the resource. It is updated by Line Managers for employees.

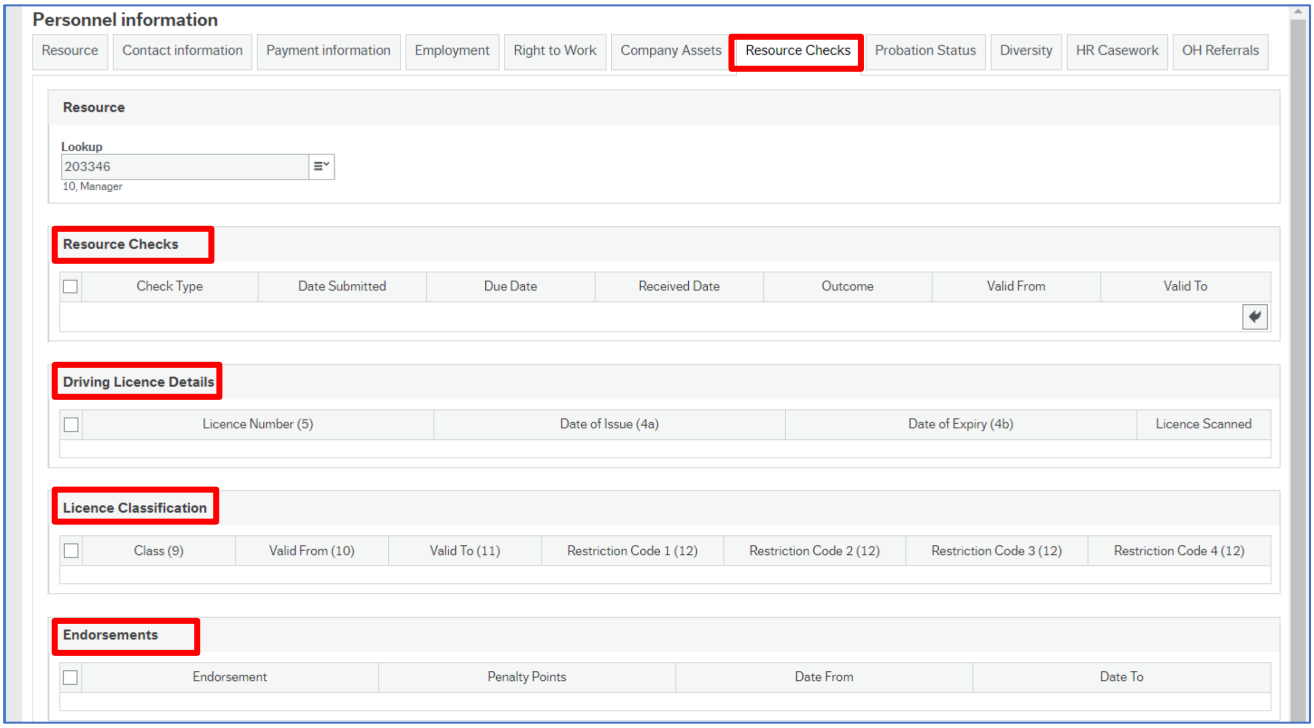


To update this tab

1. Click **Add** to insert a new row
2. Press **[Space bar]** to select the **Asset Type**
3. In **Reference No** enter the asset ID
4. Ensure all **Date** fields are complete
5. Add any relevant comment for this asset e.g. Slight scratch on laptop
6. Click **Save** when each row is complete
7. When an asset is handed back ensure **Return date** is completed, and click **Save**

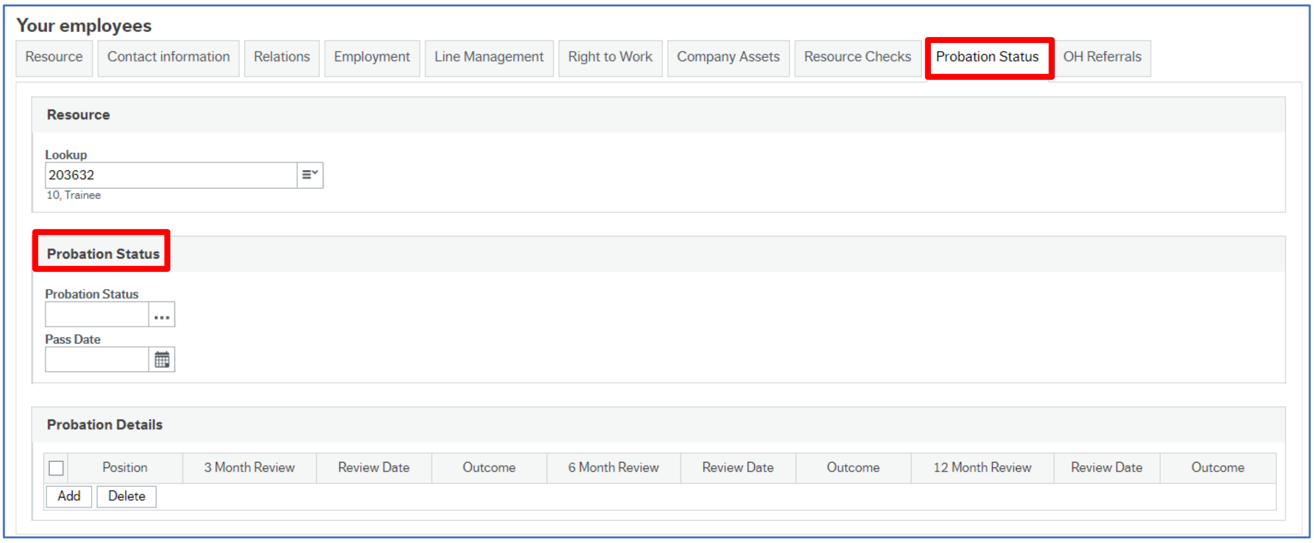
4.8. Resource Checks Tab

This tab is normally completed retrospectively by HR when a resource has started. Pre-employment checks will take place outside of BW but recorded within BW once the resource record has been created via the recruitment process.



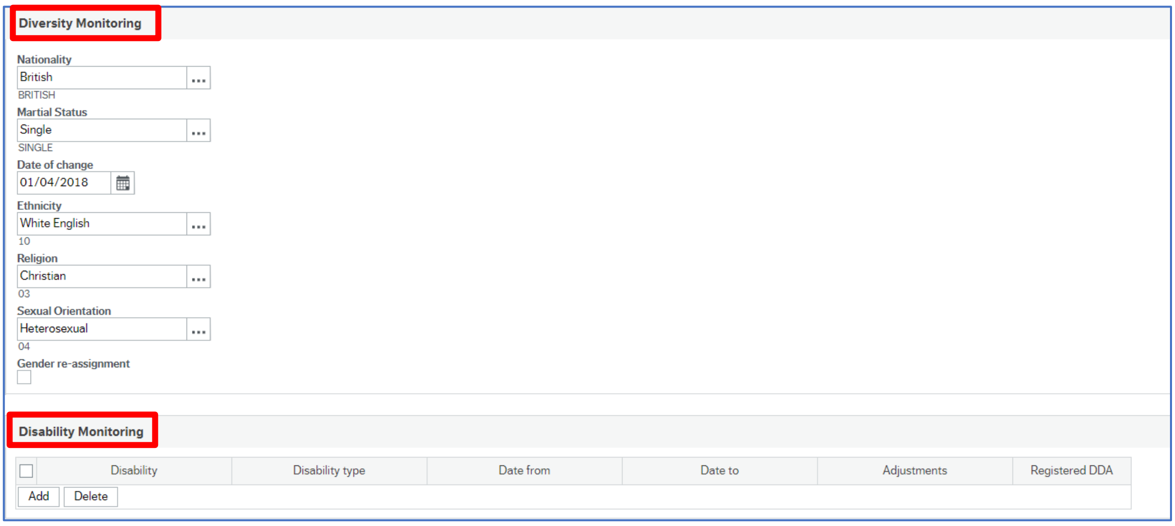
4.9. Probation Status Tab

This is set up for a Starter or where it is necessary for an employee to go on a probation period. It will be automatically completed for a New Starter but can be added to/edited and updated by the Line Manager when they have completed the reviews. Should the outcome be unsuccessful, this may invoke the Leaver Process and you should seek HR advice. Line managers can run a report that shows where their staff are in the probation process.



4.10. Diversity Tab

This is completed by HR from the Recruitment Monitoring Form but can be maintained by both HR and the Resource.



This tab has two sections:

- **Diversity Monitoring** – for Nationality, Ethnicity, Religion etc.
- **Disability Monitoring** – Disability, Dates, Adjustments and Registered DDA

4.11. Action Buttons

The action buttons apply to the Personnel information screen, whichever tab is being viewed.

- **Save** - this will save any changes made to the record
- **Clear** – this normally clears the current data. Does not work on Personnel information
- **New** – for **HR use only** when creating new resources. It is not used by **Line Managers**
- **Copy** - for **HR use only** when creating new resources. It is not used by **Line Managers**
- **Export** – this produces a report that could be printed
- **Balance** – this opens the Balance screen displaying balances for things such as Annual Leave, Tax, NIC etc.
- **Rates** – this opens the Rates screen displaying rates of pay

4.11.1 Balance Screen

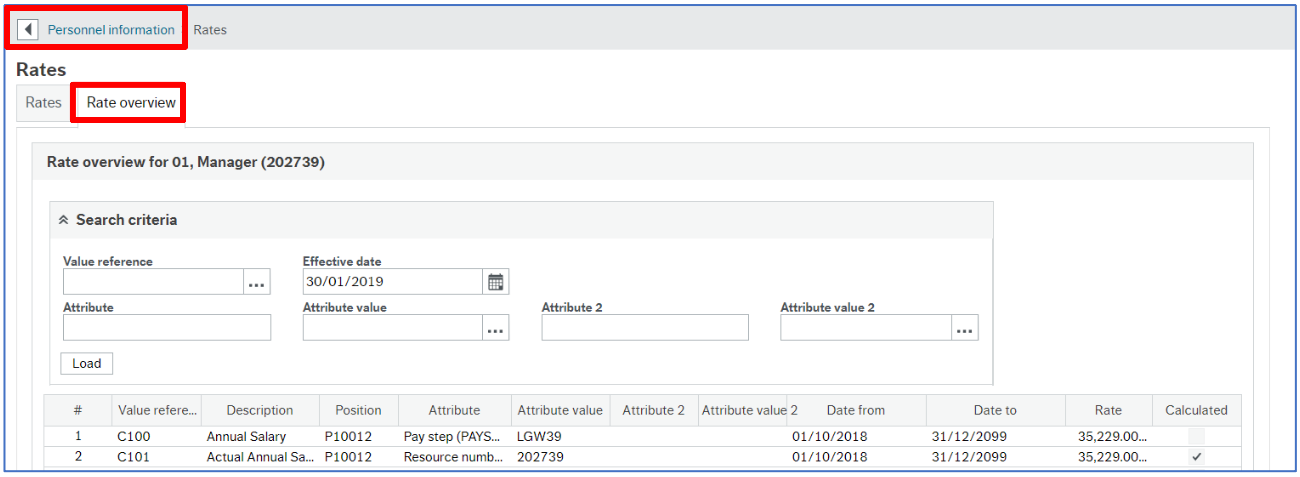
1. Click **Balance**

2. Click **Personnel information** to return to the previous screen

Embridge Consulting
Driving value from your business systems

4.11.2 Rates Screen – Rates Overview Tab

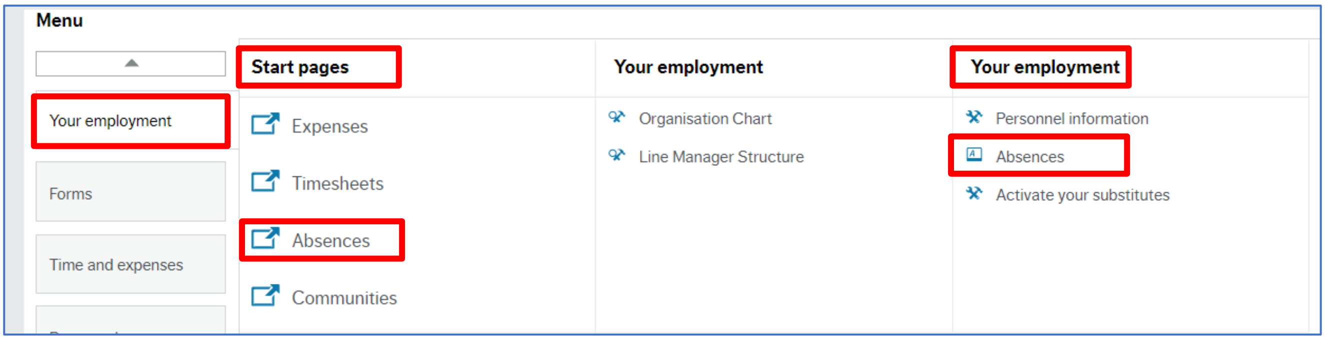
1. Click **Rates**



2. Click **Rates overview**
3. Click **Personnel information** to return to the previous screen

5. Unplanned Absences

As a Line Manager you can access Absence from two places, but each has a different use:



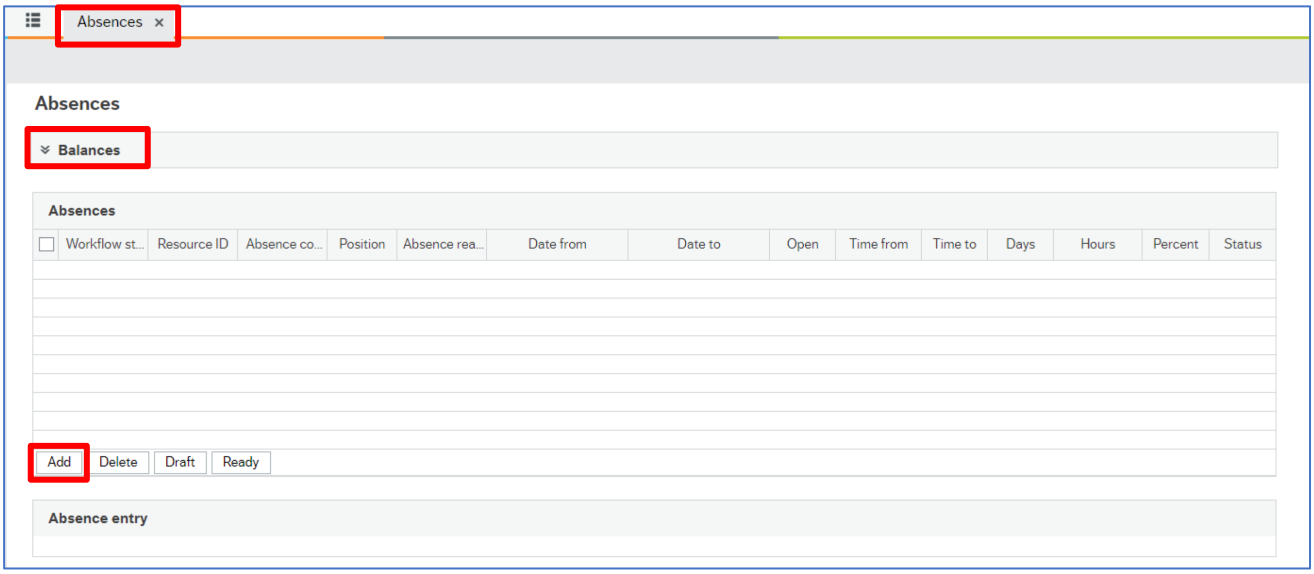
Your employment → Start pages → Absences is used to request Annual Leave and planned absences primarily for yourself, but can be used if the staff member cannot access by themselves. This is only for those who record Annual Leave or normal planned absences, which for the most part will not be teaching staff.

Your employment → Your employment → Absences is used to report unplanned absences for your employees especially Sick type absences.

5.1. Staff Sickness - Recording Sickness

To record staff sickness or unplanned absences, navigate to:

Your employment → Your employment → Absences



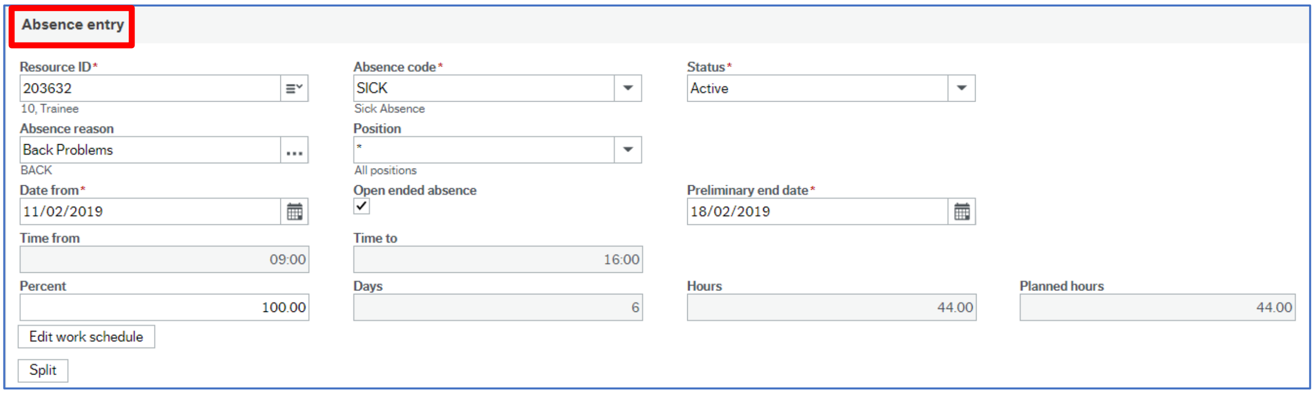
This section records the history of absences and is populated from the entries made in the **Absence entry** section and it updates each time you tab out of a filed in the Absence entry section. It is also the place where absence entry begins.

1. Click **Add**

The **Absence entry** section opens

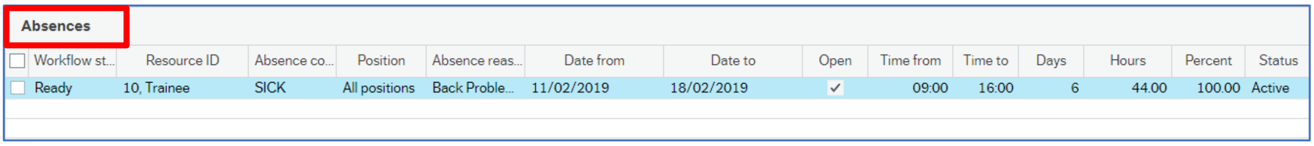
5.1.2 Absence Entry Section

As this section is completed, the screen will change depending on the options used.



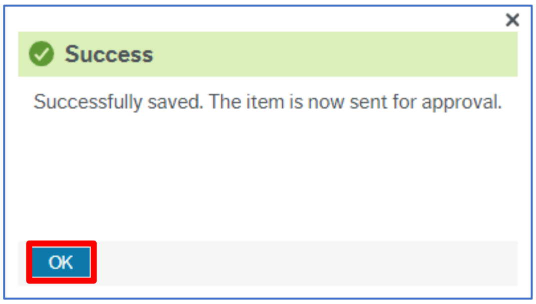
1. **Resource ID** - press **[Space bar]** or use type ahead to select the resource
2. **Absence code** – select the type of absence from the drop down
3. **Status** – this defaults to Active
4. **Absence reason** – press **[Space bar]** or use type ahead to select the reason
5. **Position** – select **All positions** from the drop down
6. **Date from** – enter the date the absence began
7. **Open ended absence** – if the return date is known, leave blank. If the return date is not known, select the check box
8. **Date to / Preliminary end date** – this field name will change if **Open ended absence** is selected. Enter the relevant date
9. **Percent** – leave as default 100.00

The Absences section is populated with the details.



10. Click **Save**

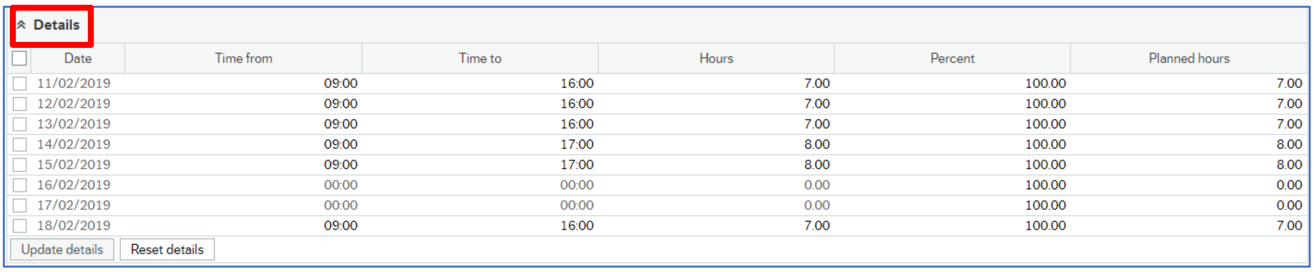
The **Success** popup opens.



11. Click **OK**

5.1.3 Details Section

1. Click **Details**



Details

	Date	Time from	Time to	Hours	Percent	Planned hours
☐	11/02/2019	09:00	16:00	7.00	100.00	7.00
☐	12/02/2019	09:00	16:00	7.00	100.00	7.00
☐	13/02/2019	09:00	16:00	7.00	100.00	7.00
☐	14/02/2019	09:00	17:00	8.00	100.00	8.00
☐	15/02/2019	09:00	17:00	8.00	100.00	8.00
☐	16/02/2019	00:00	00:00	0.00	100.00	0.00
☐	17/02/2019	00:00	00:00	0.00	100.00	0.00
☐	18/02/2019	09:00	16:00	7.00	100.00	7.00

Update details Reset details

This section displays the work schedule for the resource and which days/hours are impacted by the absence.

5.2. Sickness Absences - Adjusting a Sickness Record

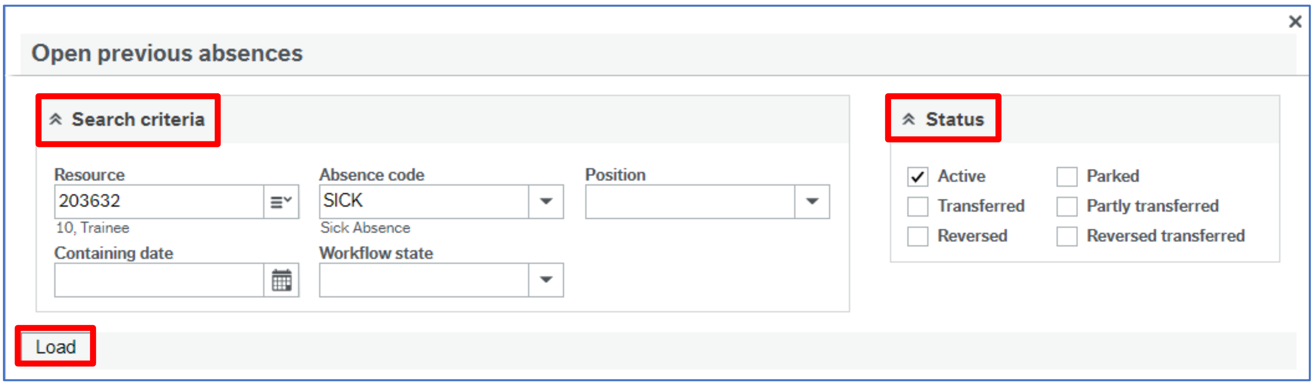
On occasion, when an Absence has been recorded incorrectly, it will be necessary to open that Absence line and correct it. This is more prevalent for those Sick type absences where an “Open ended” date, known as “preliminary end date” was recorded. It is very important the correct amount of days of absence is recorded as this may affect that person’s pay.

5.2.1 Changing a Submitted Sickness Absence

To open a previous absence, navigate to:

Your employment → Your employment → Absences

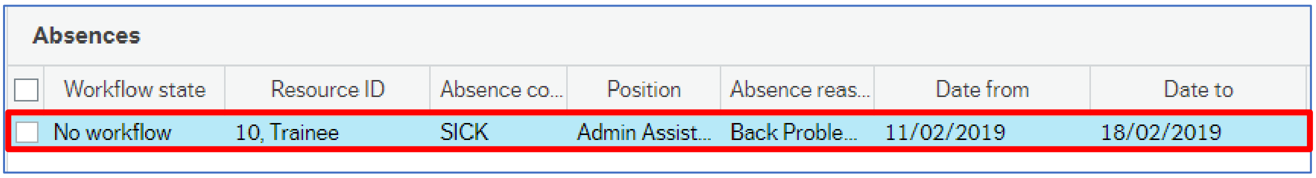
1. Click **Open**
2. In the dialogue box that appears, enter the Resource name and Absence code of Sick



3. Take note of the status section. The following Statuses mean:
   - **Active** - still in the system and ready to be edited
   - **Transferred** - transferred to Payroll for payroll calculations, if they apply
   - **Reversed** – those Transferred by Payroll, but then “reversed” as they were incorrect
   - **Parked** - any absence that did not enter Workflow due to being “parked” up to edit later (these, if found, should be dealt with - delete or process through)
   - **Partly Transferred** - where a long-term absence across 2 Payroll periods has had the first part taken over by Payroll, but the second part is still available to the User

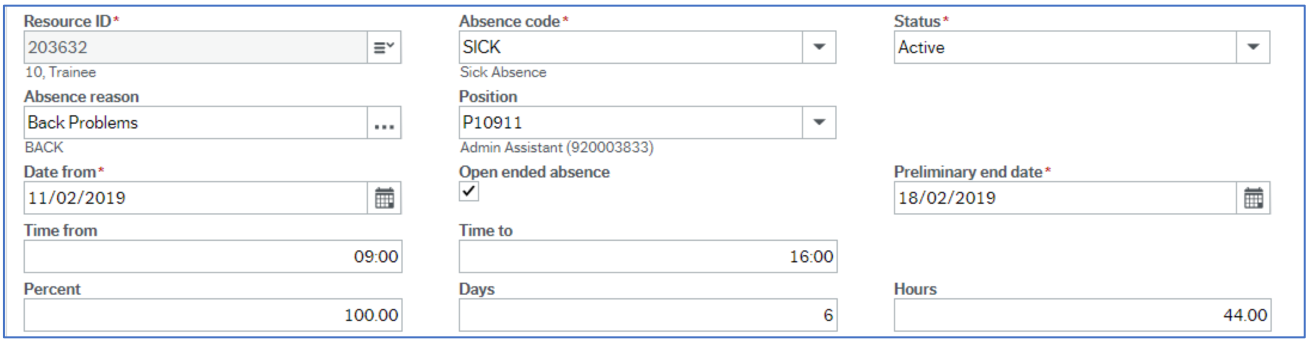
- **Reversed Transferred** - those that had been fully processes by Payroll, beyond Payroll Processing, but were found to be incorrect/needing removal

4. Leave the tick in **Active**, as they ought to be still active unless this is beyond the Payroll cut-off date for your Payroll
5. Click **Load**
6. Click on the Absence row that needs changing


Absences

	Workflow state	Resource ID	Absence co...	Position	Absence reas...	Date from	Date to
☐	No workflow	10, Trainee	SICK	Admin Assist...	Back Proble...	11/02/2019	18/02/2019

7. In the **Details** section below, make the change to the **Date to**, **Time**, **Absence reason** etc.

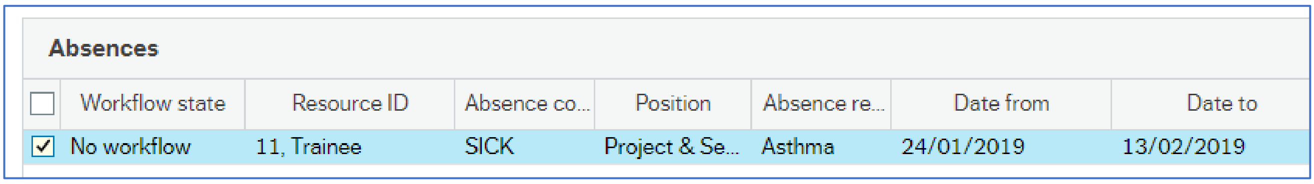


8. Check your entries then click **Save**
9. The Success banner will appear and the Workflow status will change to **Workflow in progress**. This, in turn, will become **No workflow** as this is self-approving by Managers

5.2.2 Deleting a submitted Sickness Absence

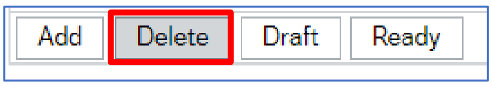
If you have entered an Absence for the wrong person you can delete the transaction altogether. **Note**- this is **not** possible if it is **Transferred** or **Partly Transferred** to Payroll. Contact SC Payroll if this is the case.

1. Follow all the steps previously, up to step 6
2. Now loaded, click on the row to check the details, in case this is not the correct one to delete
3. Tick the check-box on the left of the row of Absence (or rows, as necessary)


Absences

	Workflow state	Resource ID	Absence co...	Position	Absence re...	Date from	Date to
☑	No workflow	11, Trainee	SICK	Project & Se...	Asthma	24/01/2019	13/02/2019

4. Click **Delete**. The row will disappear and will not be transferred by Payroll



6. Competence

Competences can be recorded for your resources, but the norm is that they enter their own. These are then routed to the Line Manager as a Task. Examples are Educational & Professional qualifications or Job-related competencies.

As a Line Manager you can enter a Competence from two places, but each has a different use.

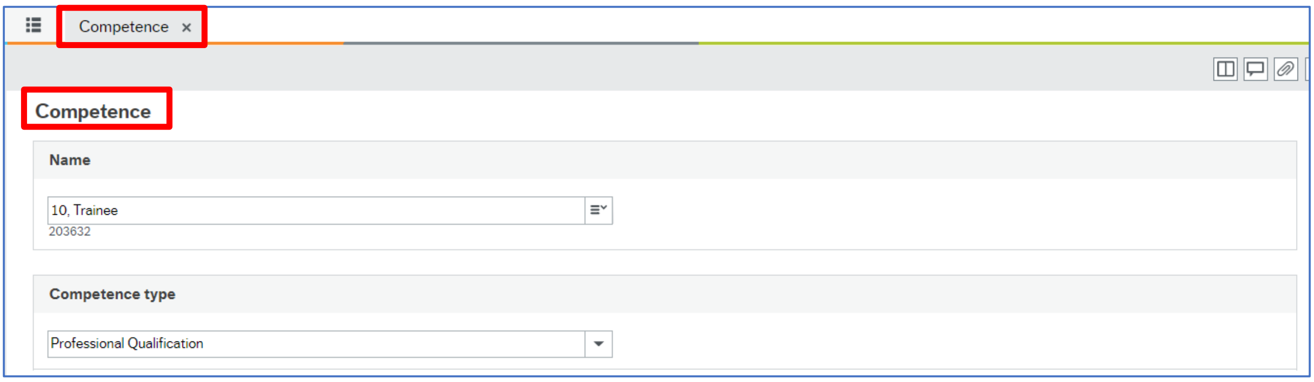
Your employment → Your development → Competences is used to enter competences for yourself.

Personnel → Competence → Competence is used to record competences for your employees and yourself.

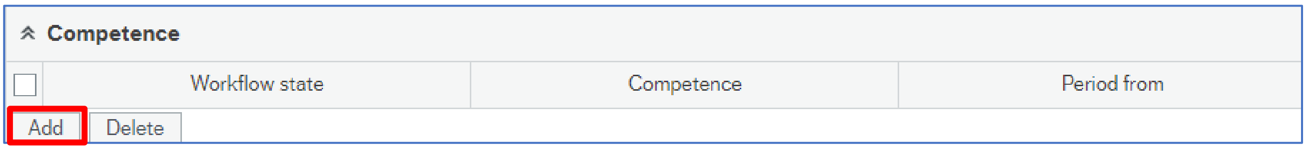
6.1. Staff Competence Entry

To record staff competences, navigate to:

Personnel → Competence → Competence



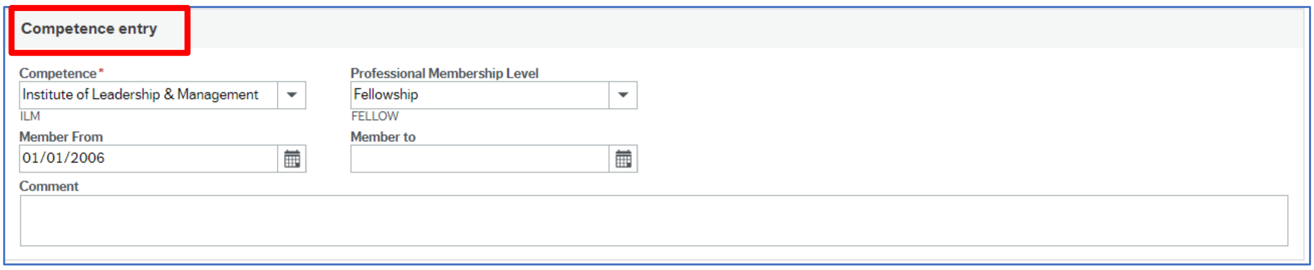
1. **Name** - press **[Space bar]** or use type ahead to select the resource
2. **Competence type –** select the type of competence from the drop down



3. **Competence –** click **Add** to open Competence entry

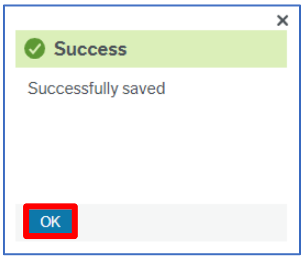
6.1.1 Competence Entry Section

As this section is completed, the screen will change depending on the options used.



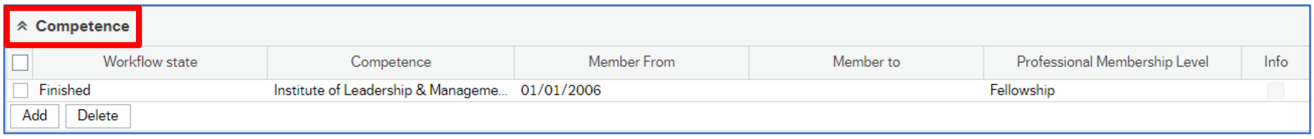
1. **Competence** - select the competence type from the drop down. This will determine what the following fields are called. This example uses a professional competence
2. **Professional Membership Level** – select the level from the drop down
3. **Member From** – enter the membership start date
4. **Member to –** enter the membership end date, if time limited
5. **Comment –** relevant comments can be entered
6. **Attachment** – add an image/scanned copy of the relevant certificate for HR confirmation checks. See the Attachments section
7. Click **Save**

The **Success** popup opens.



8. Click **OK**

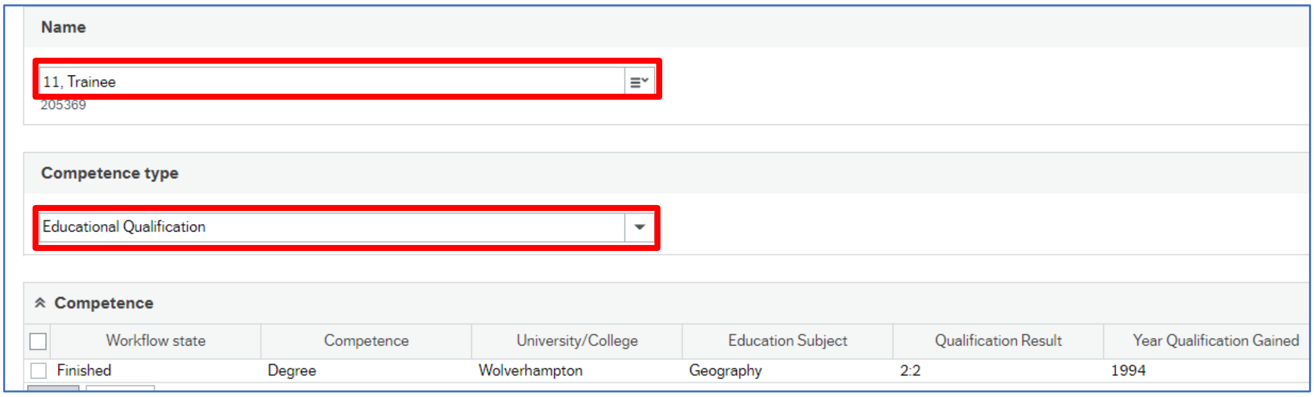
The Competence section is populated with the details.



ⓘ	Initially the Workflow will state **Workflow in Progress** but will then become **Finished**, as this is self-approving.

6.1.2 Viewing Current Competences

Viewing a Competence for staff members is a case of loading the name, then the Competence Type, or using a Global report such as **HR: LM Current Competence Record per Resource**.



1. **Name** - press **[Space bar]** or use type ahead to select the resource
2. **Competence type –** select the type of competence from the drop down
3. **Competence –** use the dropdown to choose Educational Qualification, for example

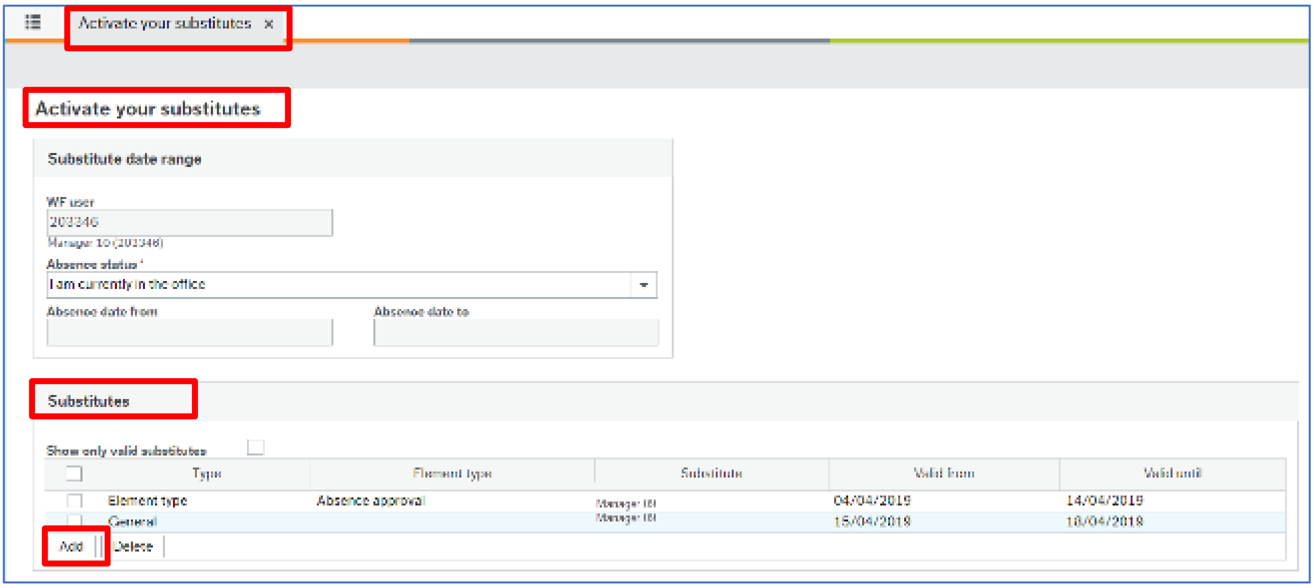
7. Activate Your Substitutes

In the event of a planned absence, such as Annual Leave, you can nominate a Substitute to act on your behalf to receive Tasks and Alerts, and to action them with the same levels of approval as yourself. You can do this as a General substitute where one person assumes all of your responsibilities or by individual elements where you have several substitutes responsible for different areas. In both cases, you can only select a substitute from a pre-defined list of resources.

7.1.1 Activate Substitutes

1. Navigate to:

   Your employment → Your employment → Activate your substitutes



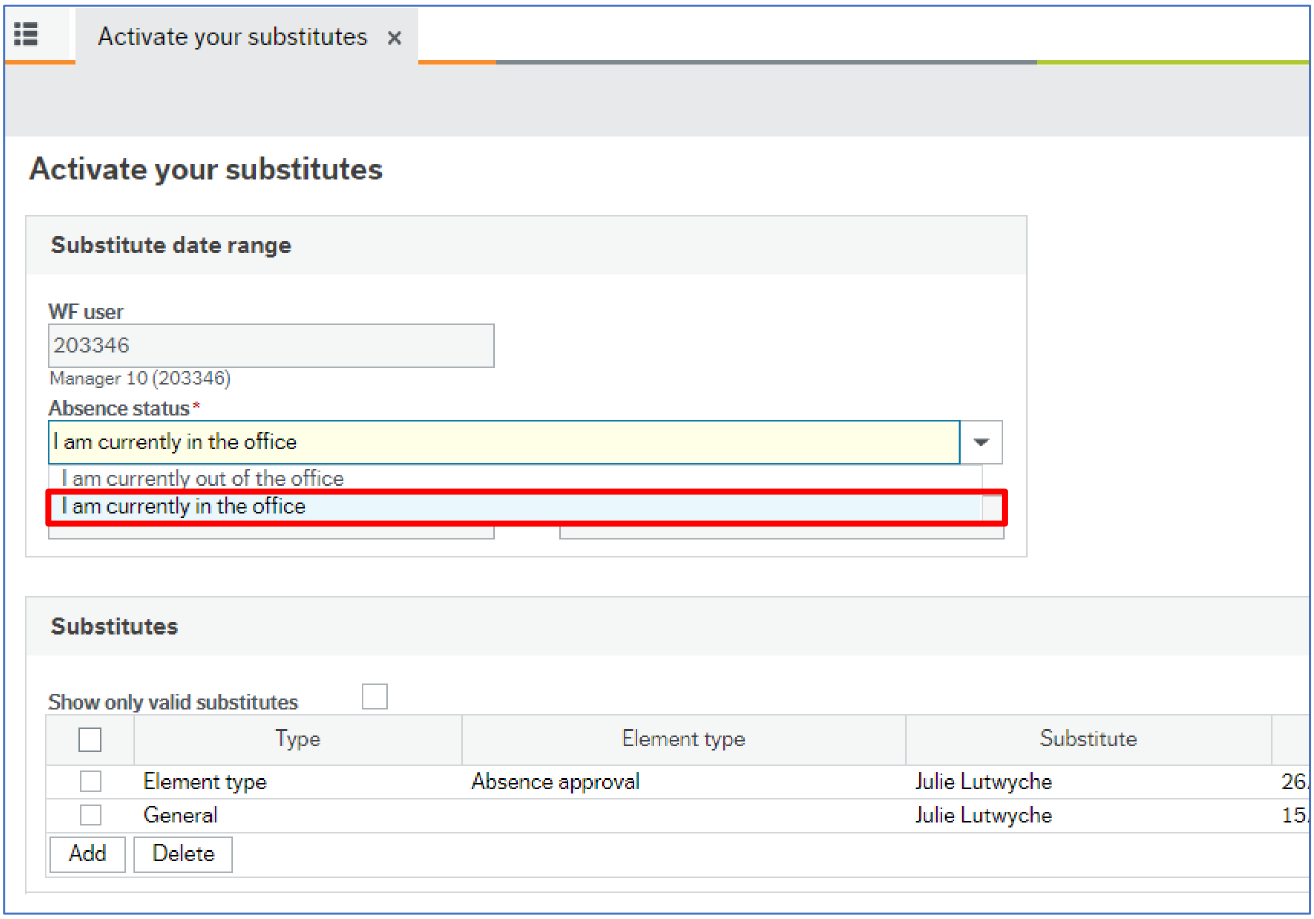
In the Substitutes section:

2. Click **Add** to open a new line
3. **Type** - select the type of substitute from the drop down, **Element** or **General**
4. **Element type –** press **[Space bar]** or use type ahead to select the type of element if it is not a **General** substitute
5. **Substitute –** press **[Space bar]** or use type ahead to select the substitute
6. **Valid from** – enter the substitute start date
7. **Valid until** – enter the substitute end date
8. Click **Save**

7.1.1 End Active Substitutes

Substitutes automatically end at midnight on the **Valid until** date.

If you return early, you can simply change the Absence status to “I am currently in the office”. This will turn off the Workflow substitution.

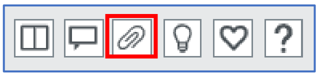

Activate your substitutes ×
Activate your substitutes
Substitute date range
WF user
203346
Manager 10 (203346)
Absence status*
I am currently in the office
I am currently out of the office
I am currently in the office
Substitutes
Show only valid substitutes
Type
Element type
Substitute
Element type
Absence approval
Julie Lutwyche
26.
General
Julie Lutwyche
15.
Add
Delete

8. Attachments

It is possible to add supporting attachments of any standard file format to records in BW. The documents are added to the Document Archive and can be seen by anybody who has access to the relevant record.

8.1. Adding Attachments

1. Navigate to the required person, position record or other relevant screen

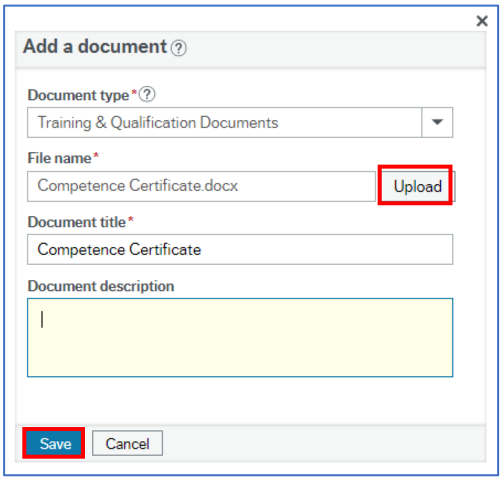


2. Click **Open documents**

The **Document Archive** popup opens. Ensure the popup-blocker is not on.

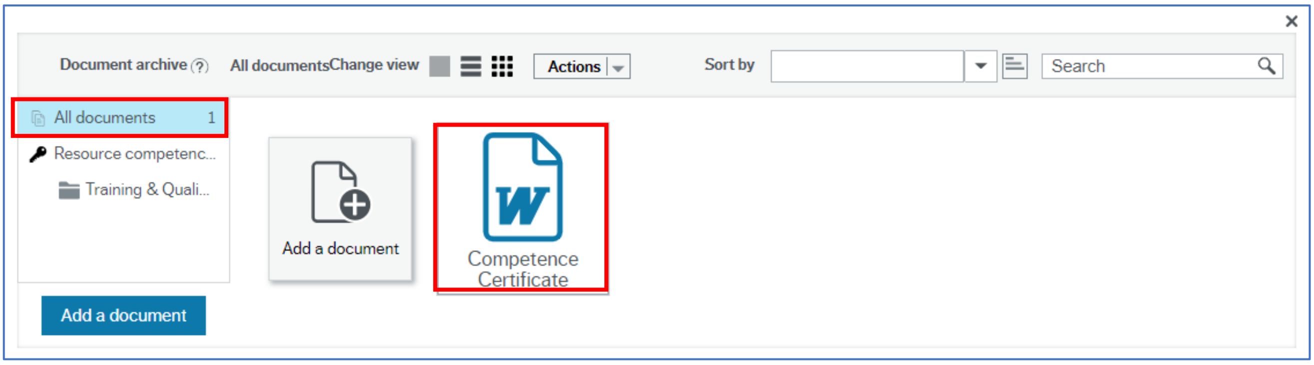
Documents can be added to either **All documents** or a specific folder.

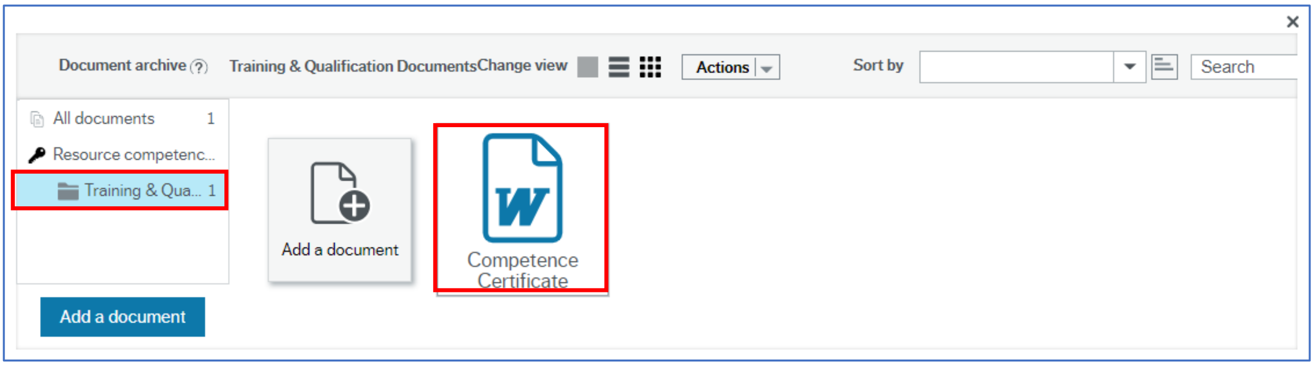
3. Select the correct folder for the attachment to be added to
4. Click **Add a document**, the icon or the button
5. Click **Upload** to locate the required file



6. Enter a **Document description**, if needed
7. Click **Save**

The **Add a document** popup closes.





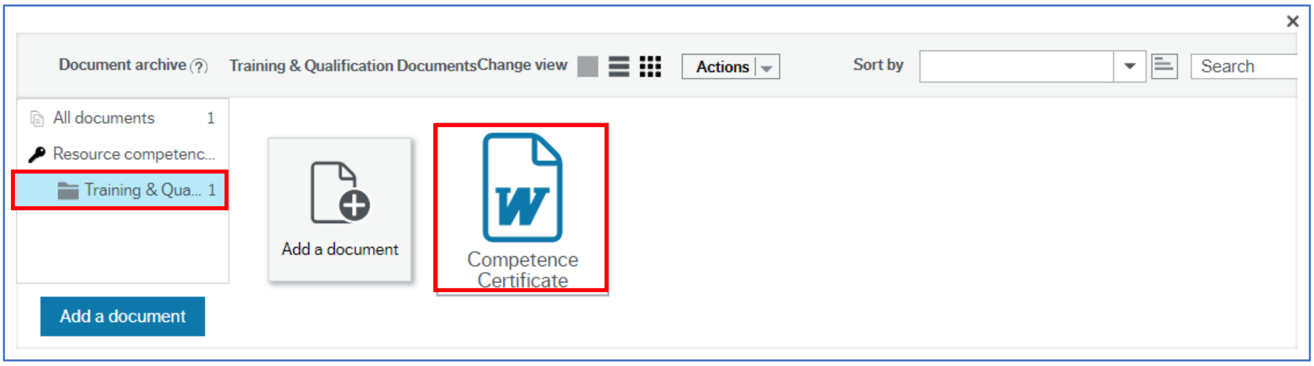
The document appears in the **Document archive**, the folder it is in is indicated with the number of documents in that folder and the **All documents** folder shows how many documents in total are held against the person or position.

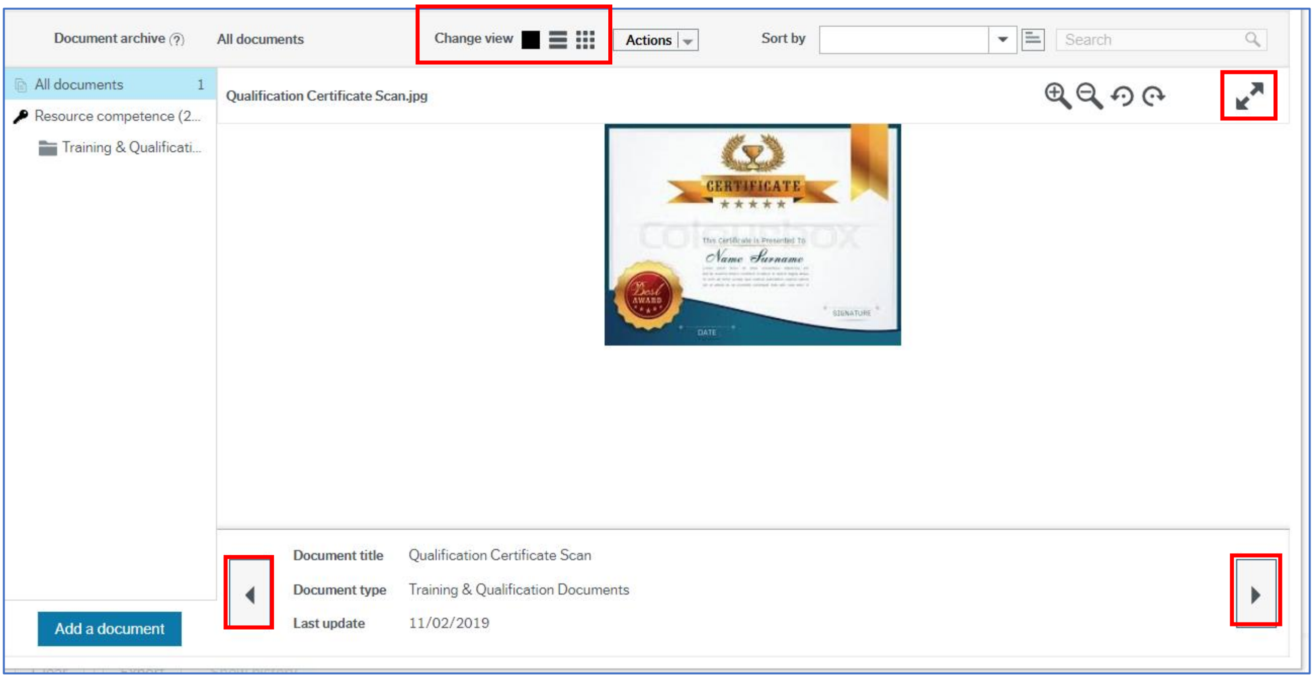
8. Close the **Document archive**

8.2. Viewing Attachments

If a record has attachments in the Document archive, the **View documents** icon will be blue.

1. Click **View documents** to open the **Document archive**
2. Click on the folder you wish to view documents within or select **All documents**
3. Double click the file to view



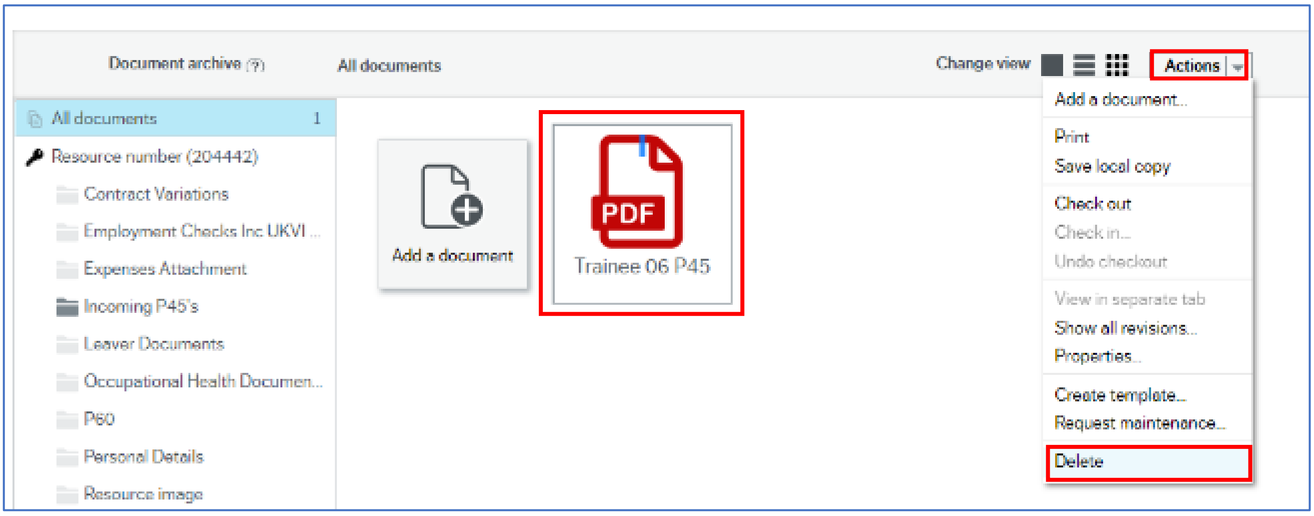


4. Click **Full screen** to maximise the image size
5. Click the direction arrows to navigate to additional attachments
6. Click the **Change view** icons to return to all attachments

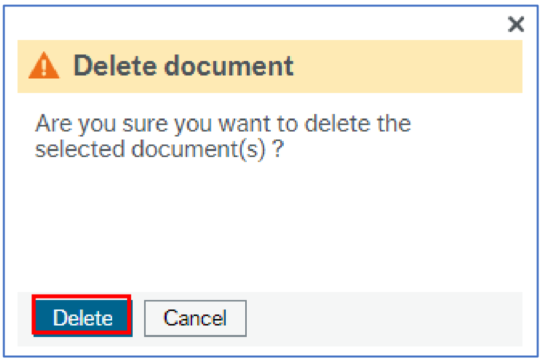
8.3. Deleting Attachments

You should only delete attachments you have added in error. Do not delete any other attachments.

1. Click once on the attachment to be deleted



2. Click **Actions**
3. Select **Delete**



4. Click **Delete** on the confirmation popup

9. Forms

9.1. Forms

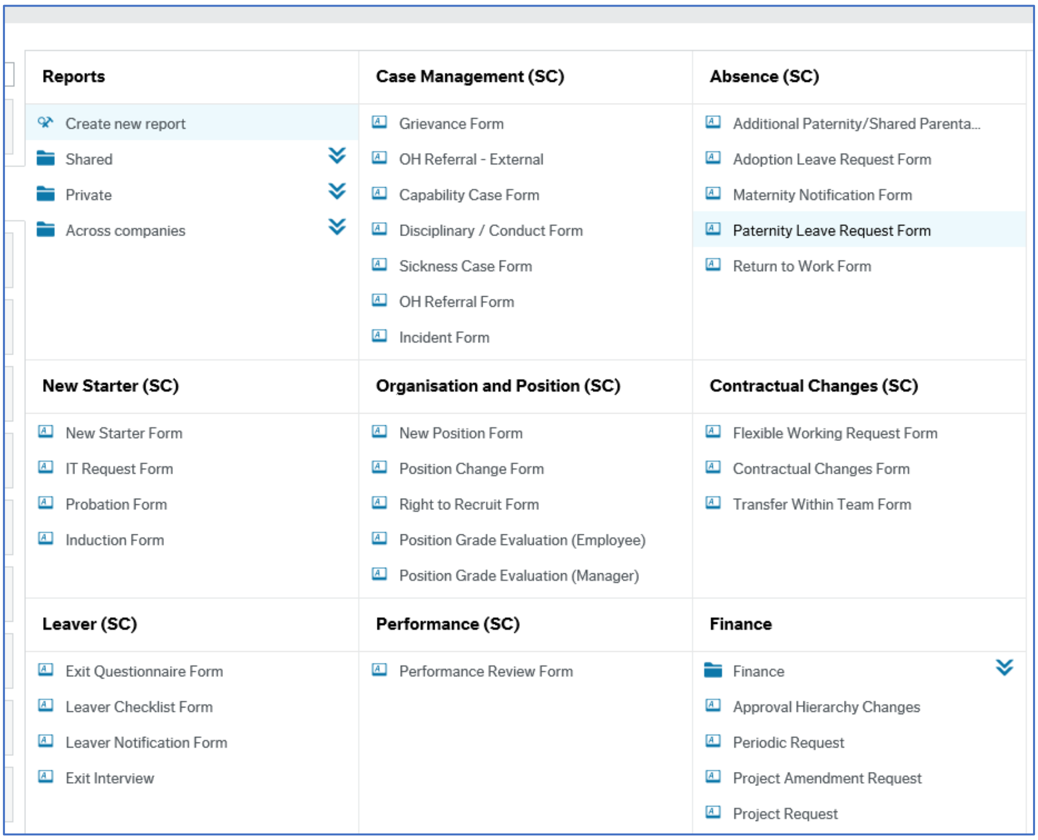
Forms should be named in line with the organisation naming convention to ensure that no sensitive data is added into the form title.

The naming convention is:

Form Description/Resource ID/Initials/Directorate/mm/yy

9.2. Form Introduction

Forms are all stored within the forms tab from the main menu in various sections.



Review this user guides section **Forms and Scenarios – Overview**, page **74** for more summary information about each form, when it is to be used and the documents that are to be attached with the form.

To attach a document to a form, you should complete the form details first, and then click **Save as draft**. Then you can attach the documents as required and then if needed, click **Submit form**.

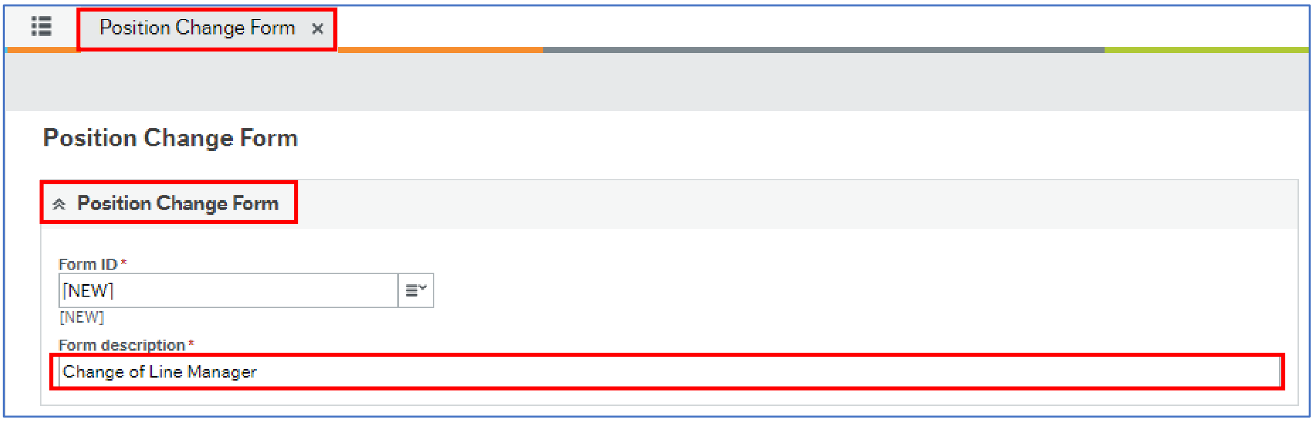
Forms are sent for approval where needed to the appropriate approvers.

Some forms are designed that you should retrieve a previously saved or submitted form and update this with the latest details at a later date or a later stage in the staff member's induction or probation.

9.3. Position Change Form

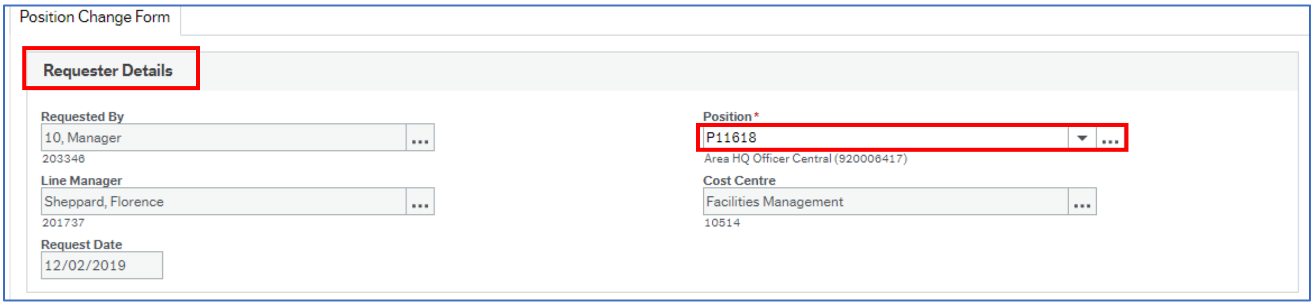
The Position Change Form is used to Amend and Close positions. Use the **Create Position Form** to create a new post in the establishment.

1. Navigate to **Forms → Organisation and Position (SC) → Position Change Form**



The Position Change Form is completed by the Line Manager requesting the change, and starts with the Position Change Form section by entering a Form description which is like a title and summary, making the form easier to search for.

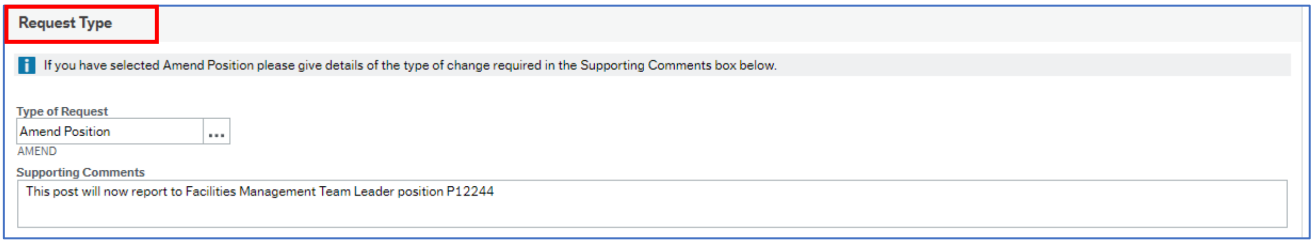
9.3.1 Requester Details Section



1. **Position** - press **[Space bar]** to select the position in which you are completing this form.

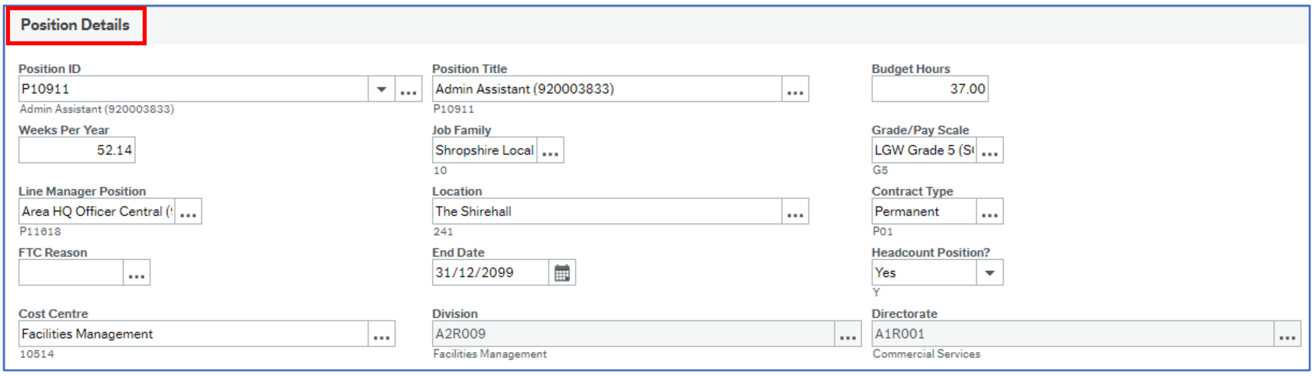
The remaining fields in this section are read only.

9.3.2 Request Type Section



1. **Type of Request** - press **[Space bar]** to select; **Amend, Close** or **Create**
2. **Supporting Comments -** explain why the change is required

9.3.3 Position Details Section

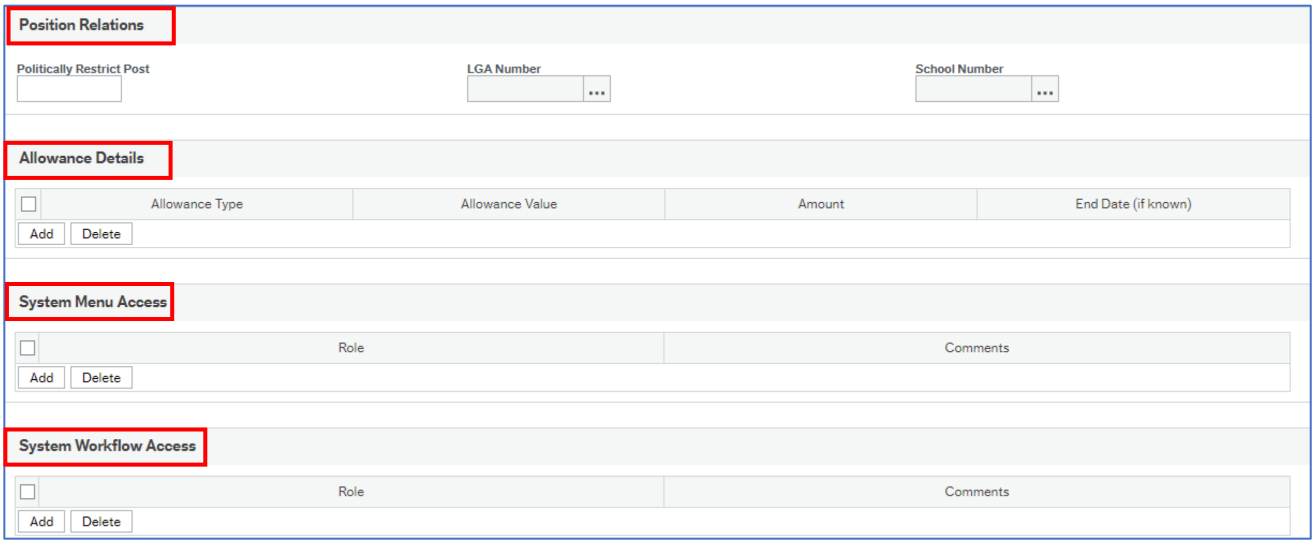


1. **Position ID** - press **[Space bar]** to select the affected position

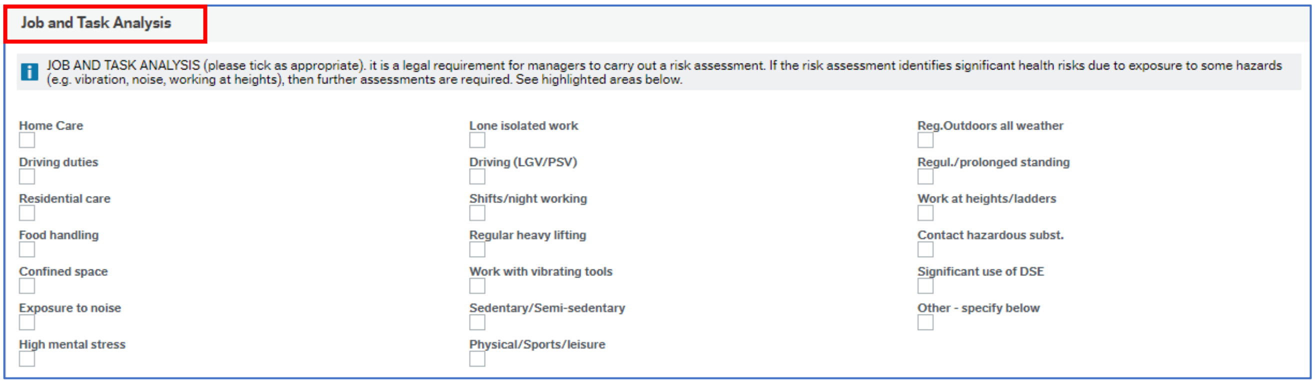
The remaining position details are populated.

9.3.4 Sections not used by Line Managers

The section highlighted below are not used by Line Managers.

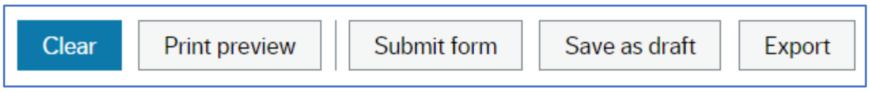


9.3.5 Job and Task Analysis Section



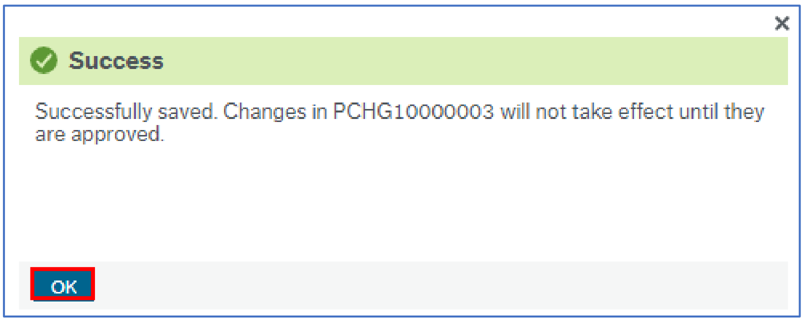
If the change being requested is impacted by any of the assessment types listed, they must be selected.

9.3.6 Action Buttons



- **Clear** - clears the contents of the form and removes the **Print preview** button
- **Print preview** - provides a view of the printed form; use **[Ctrl]** + **[P]** to print the form
- **Submit form** - sends the form into workflow for approval
- **Save as draft** - saves the form without sending it into the workflow

The **Success** message opens

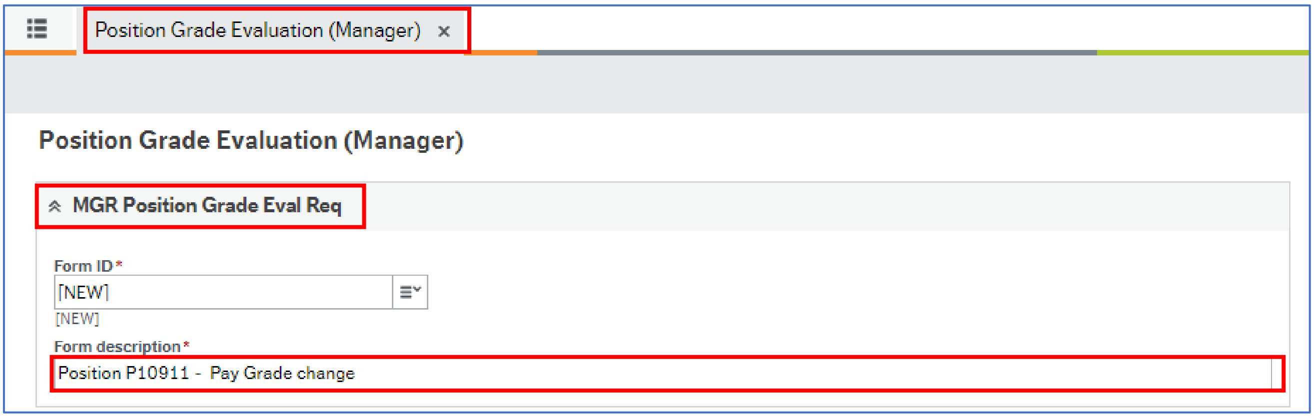


1. Click **OK** to close the message

9.4. Position Grade Evaluation (Manager) Form

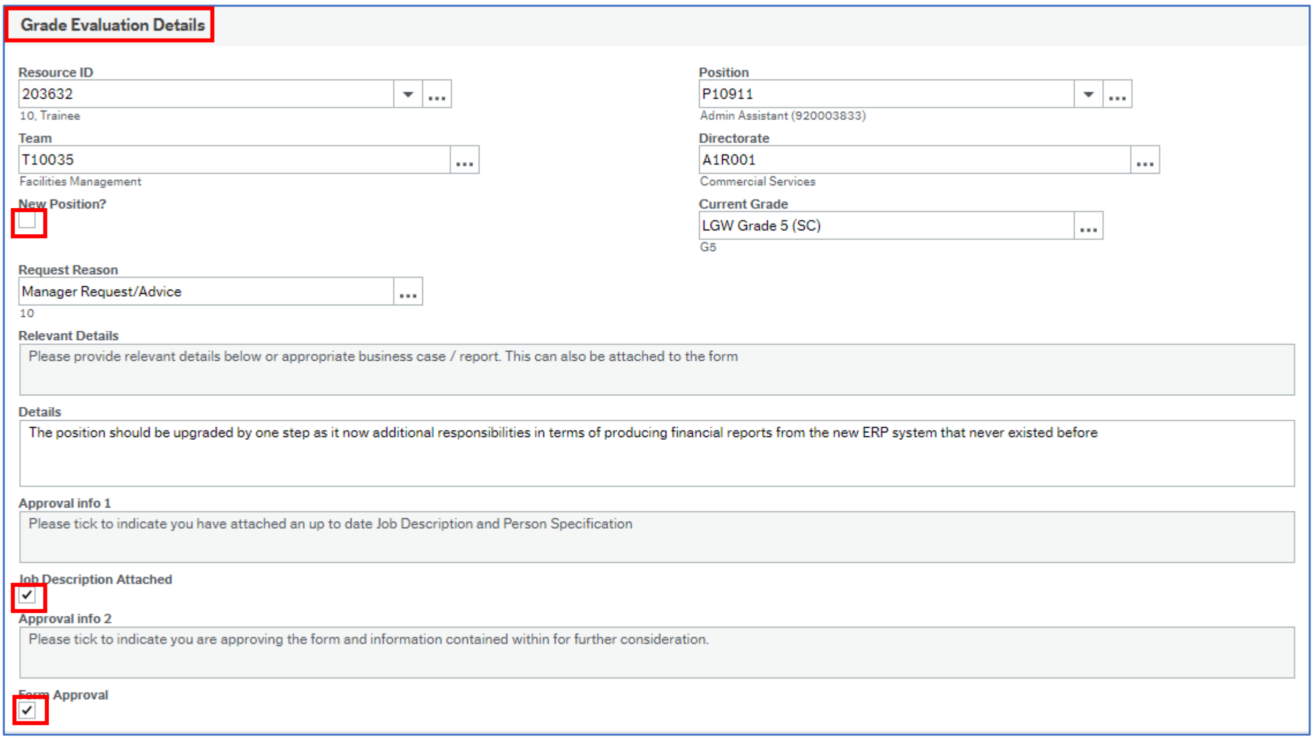
This form has a workflow associated with it because it may require action by Payroll and will require approval by a corporate director. This example covers the change in pay grade option.

1. Navigate to **Forms → Organisation and Position (SC) → Position Grade Evaluation (Manager)**



This form is completed by the Line Manager requesting the change and starts with the MGR Position Grade Eval Req section by entering a Form description which is like a title and summary, making the form easier to search for.

9.4.1 Grade Evaluation Details Tab


Grade Evaluation Details

Resource ID
203632
10, Trainee

Position
P10911
Admin Assistant (920003833)

Team
T10035
Facilities Management

Directorate
A1R001
Commercial Services

New Position?

Current Grade
LGW Grade 5 (SC)
G5

Request Reason
Manager Request/Advice
10

Relevant Details
Please provide relevant details below or appropriate business case / report. This can also be attached to the form

Details
The position should be upgraded by one step as it now additional responsibilities in terms of producing financial reports from the new ERP system that never existed before

Approval info 1
Please tick to indicate you have attached an up to date Job Description and Person Specification

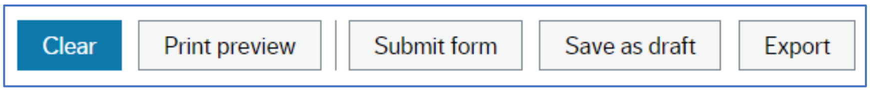
Job Description Attached

Approval info 2
Please tick to indicate you are approving the form and information contained within for further consideration.

Form Approval

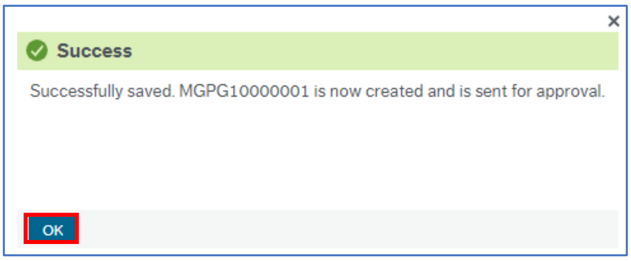
1. **Resource ID** - press **[Space bar]** to select the resource for whom you are completing this form
2. **Position** – press **[Space bar]** to select the position for which you are completing this form
3. **Team** – populated from the position
4. **Directorate** - populated from the position
5. **New Position**? – select if applicable
6. **Current Grade** – populated from the position
7. **Request Reason** – press **[Space bar]** to select the reason
8. **Details** – enter/attach relevant details or appropriate business case / report
9. **Job Description and Person Specification Attached** – select and attach before submitting. Only documents you have attached in error should be deleted
10. **Form Approval** – select to confirm

9.4.2 Action Buttons



- **Clear** - clears the contents of the form and removes the **Print preview** button
- **Print preview** - provides a view of the printed form; use **[Ctrl]** + **[P]** to print the form
- **Submit form** - sends the form into workflow to the HR Business Partner
- **Save as draft** - saves the form without sending it into the workflow

The **Success** message opens

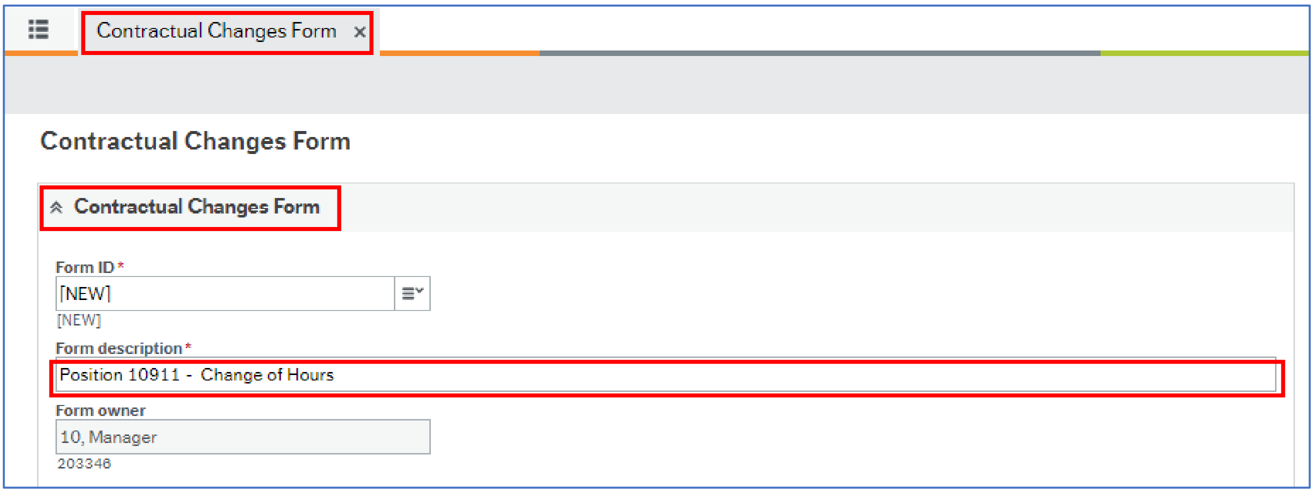


1. Click **OK** to close the message

9.5. Contractual Changes Form - Change in Hours

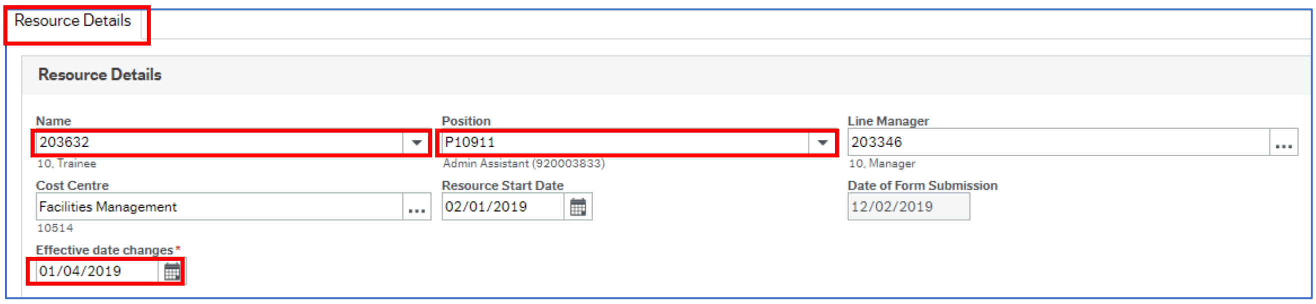
This form covers changes to contractual details with the type of change being selected from within the form. This example covers the Change in Hours option.

1. Navigate to **Forms → Contractual Changes (SC) → Contractual Changes Form**



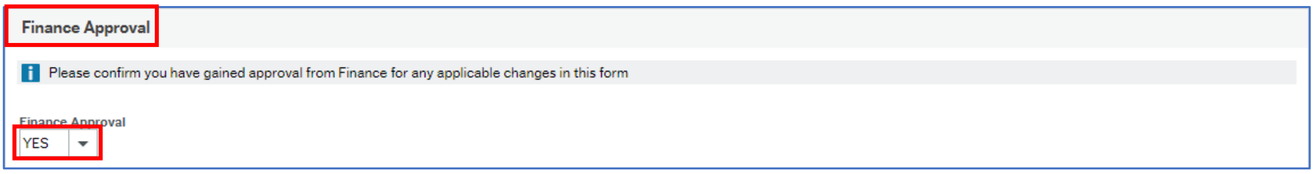
The Contractual Changes Form is completed by the Line Manager requesting the change and starts with the Contractual Changes Form using the naming convention outlined at the start of this section.

9.5.1 Resource Details Section



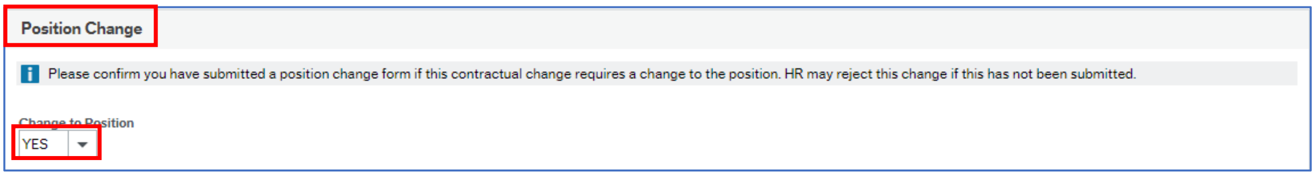
1. **Name** - press **[Space bar]** to select the resource for whom you are completing this form
2. **Position** – if the resource has more than one position, press **[Space bar]** to select the position for which you are completing this form
3. **Effective date changes** – enter by typing or using the calendar

9.5.2 Finance Approval



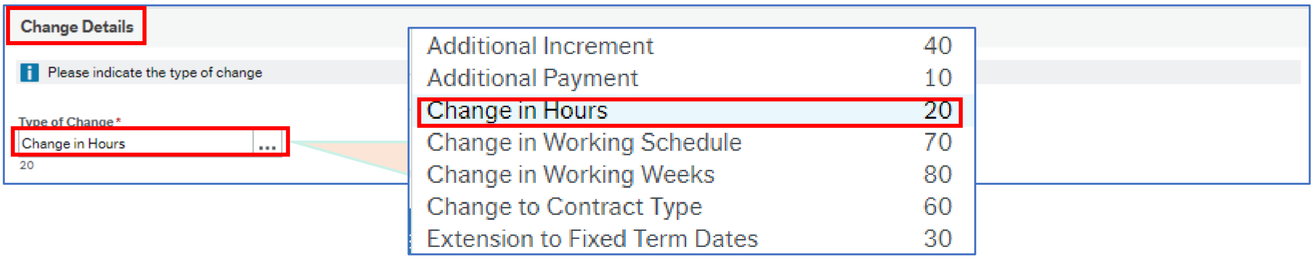
1. **Finance Approval** – select **Yes** or **No** from the drop down. This approval should be obtained before submitting this form for approval

9.5.3 Position Change Section



1. **Change to Position** – select **Yes**, **No** or **NA** from the drop down. If applicable, this should be done before submitting this form for approval

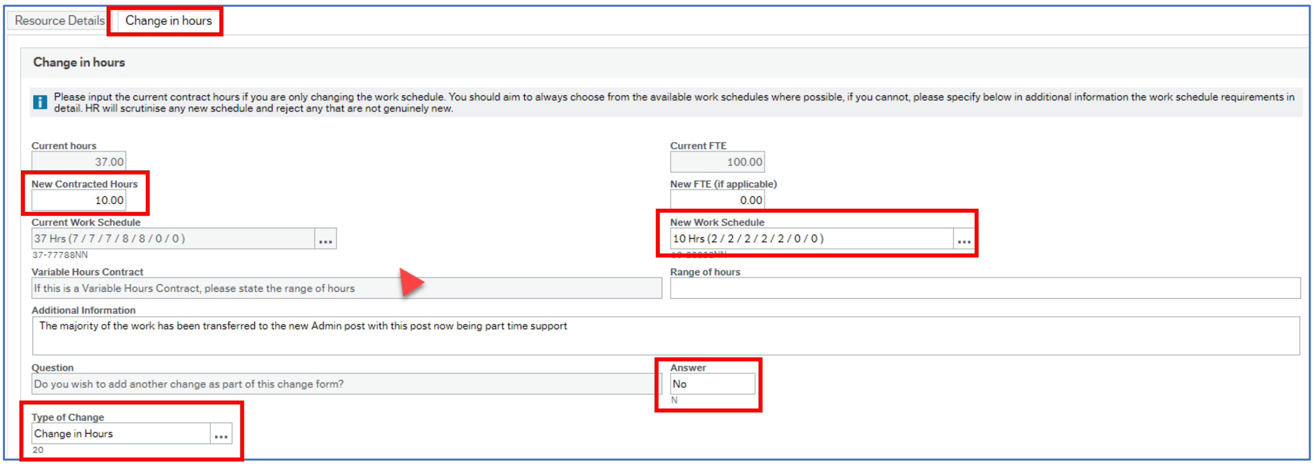
9.5.4 Change Details Section



1. **Type of Change** – select the type of change from the drop down. A second tab opens

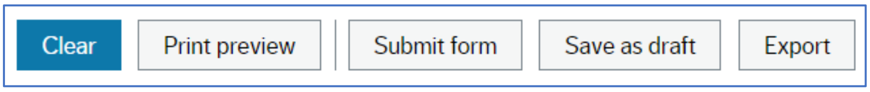
9.5.5 Change in Hours Tab

A new tab opens where the details of the changes are entered. The current details are populated in read only fields.



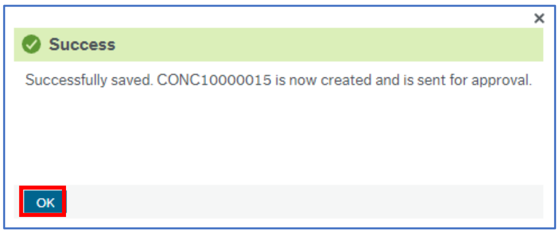
1. **New Contracted Hours –** enter the new hours
2. **New Work Schedule** - press **[Space bar]** to select the new work schedule
3. **Range of hours –** enter the range for Variable Hours Contracts
4. **Additional Information** – enter any additional details about the change
5. **Answer** – select **Yes** or **No** from the drop down to answer the question
6. **Type of Change** – select the type of change from the drop down

9.5.6 Action Buttons



- **Clear** - clears the contents of the form and removes the **Print preview** button
- **Print preview** - provides a view of the printed form; use **[Ctrl]** + **[P]** to print the form
- **Submit form** - sends the form into workflow for approval
- **Save as draft** - saves the form without sending it into the workflow

The **Success** message opens

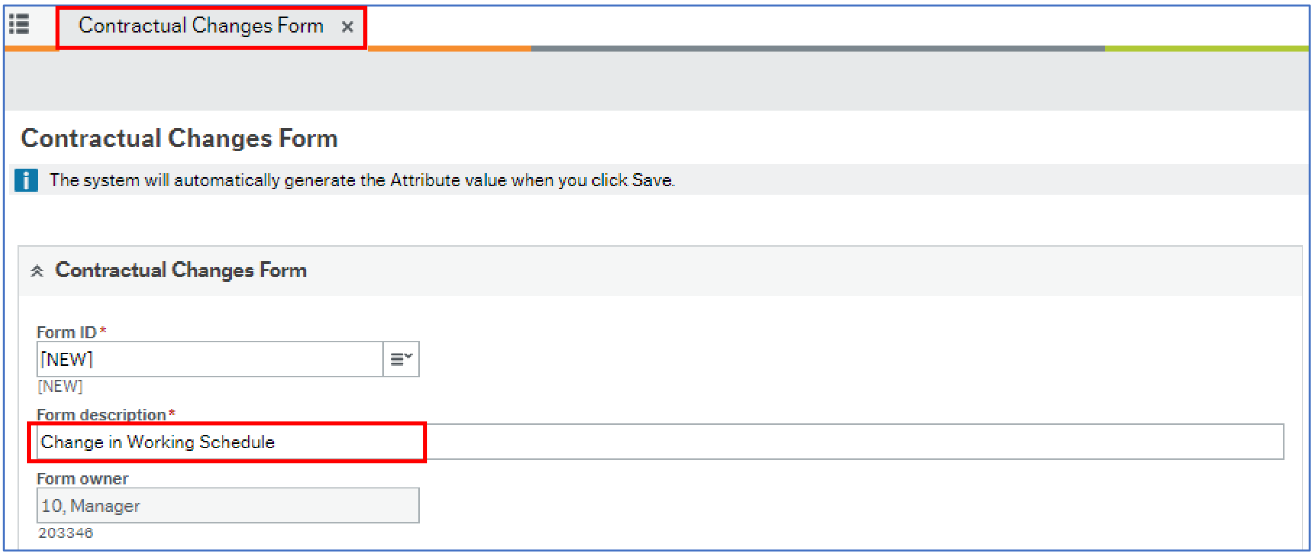


7. Click **OK** to close the message.

9.6. Contractual Changes Form - Change in Working Schedule

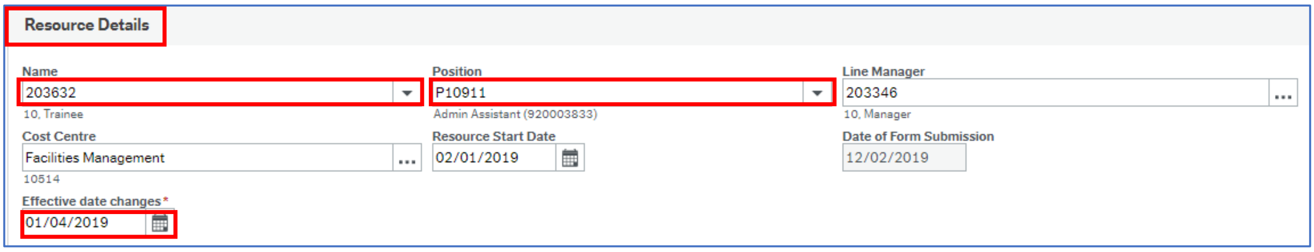
This form covers changes to contractual details with the type of change being selected from within the form. This example covers the Change in Working Schedule option.

1. Navigate to **Forms → Contractual Changes (SC) → Contractual Changes Form**



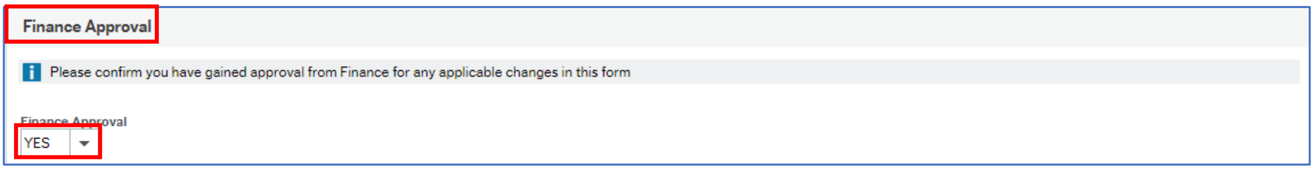
The Contractual Changes Form is completed by the Line Manager requesting the change, and starts with the Contractual Changes Form section by entering the naming convention as outlined at the start of this section.

9.6.1 Resource Details Section



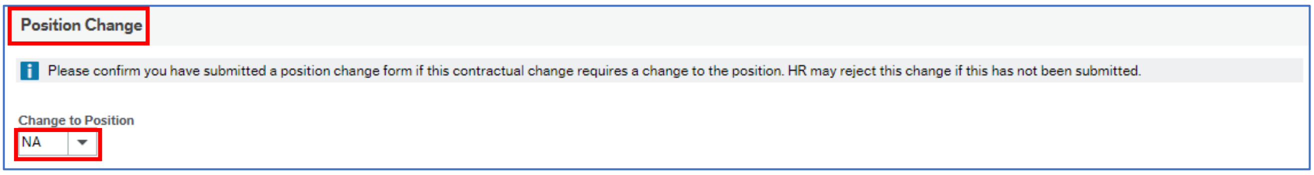
1. **Name** - press **[Space bar]** to select the resource for whom you are completing this form
2. **Position** – if the resource has more than one position, press **[Space bar]** to select the position for which you are completing this form
3. **Effective date changes** – enter by typing or using the calendar

9.6.2 Finance Approval



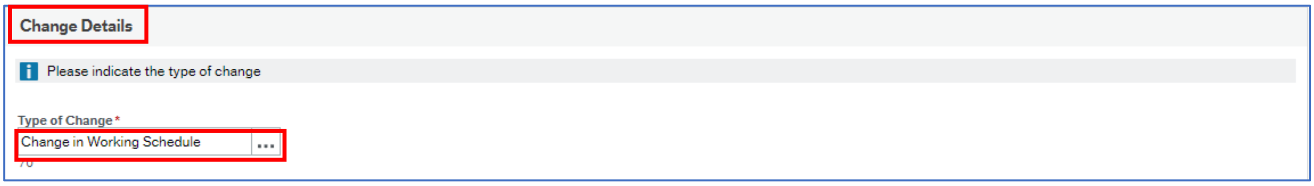
1. **Finance Approval** – select **Yes** or **No** from the drop down. This approval should be obtained before submitting this form for approval

9.6.3 Position Change Section



1. **Change to Position** – select **Yes**, **No** or **NA** from the drop down. If applicable, this should be done before submitting this form for approval

9.6.4 Change Details Section

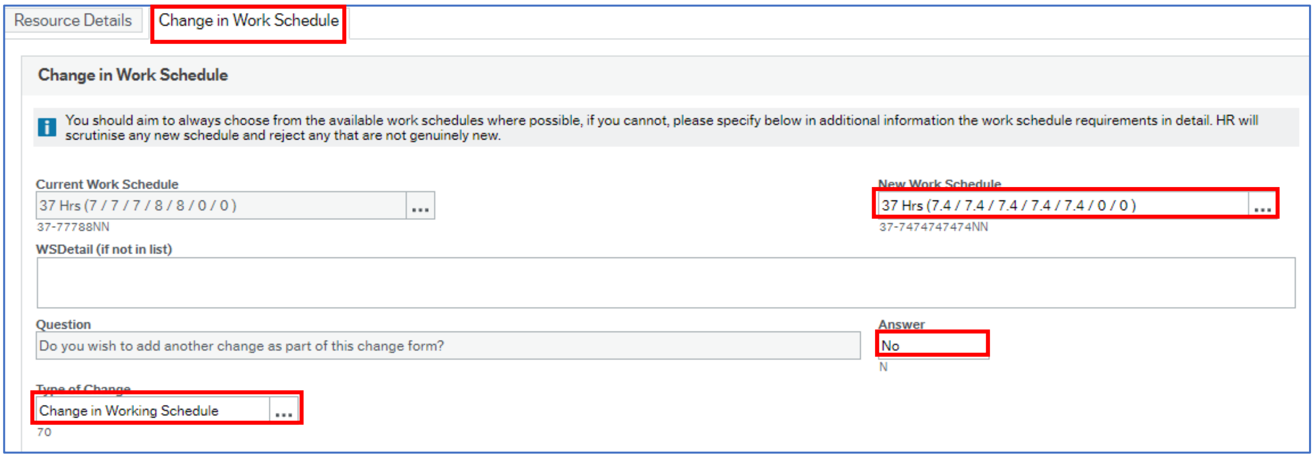


1. **Type of Change** – select the type of change from the drop down

A second tab opens.

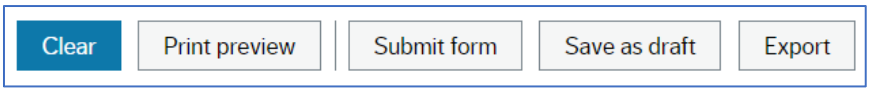
9.6.5 Change in Hours Tab

A new tab opens where the details of the changes are entered. The current details are populated in read only fields.



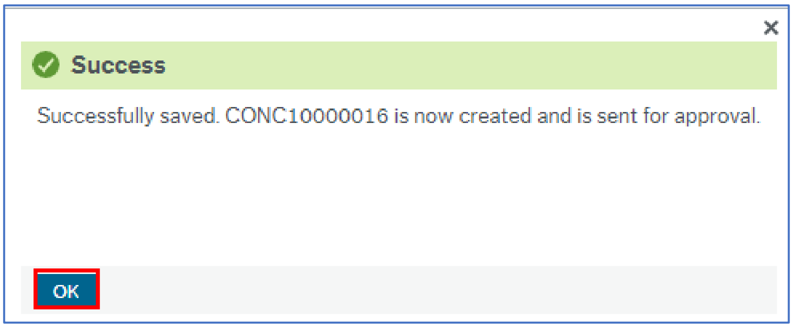
1. **New Work Schedule** - press **[Space bar]** to select the new work schedule
2. **WSDetail (if not in list)** – enter the details if it is not in the list of new work schedules
3. **Answer** – select **Yes** or **No** from the drop down to answer the question
4. **Type of Change** – select the type of change from the drop down

9.6.6 Action Buttons



- **Clear** - clears the contents of the form and removes the **Print preview** button
- **Print preview** - provides a view of the printed form; use **[Ctrl]** + **[P]** to print the form
- **Submit form** - sends the form into workflow for approval
- **Save as draft** - saves the form without sending it into the workflow

The **Success** message opens

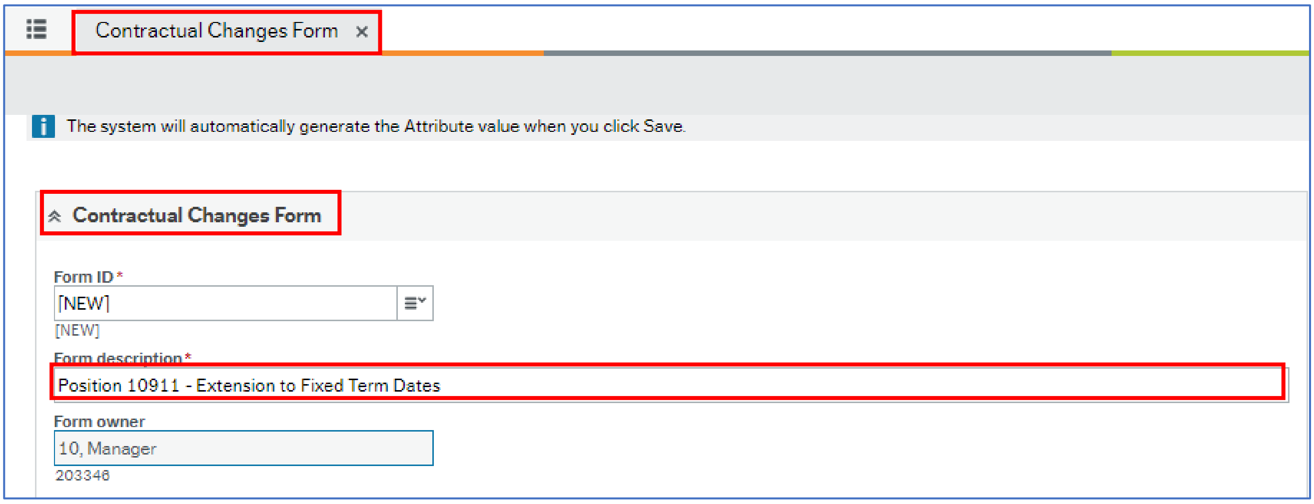


1. Click **OK** to close the message.

9.7. Contractual Changes Form - Extension to Fixed Term Dates

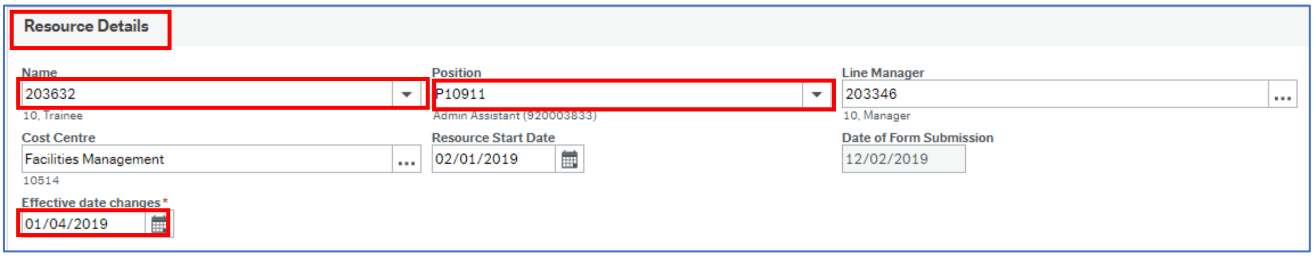
This form covers changes to contractual details with the type of change being selected from within the form. This example covers the Extension to Fixed Term Dates option.

1. Navigate to **Forms → Contractual Changes (SC) → Contractual Changes Form**



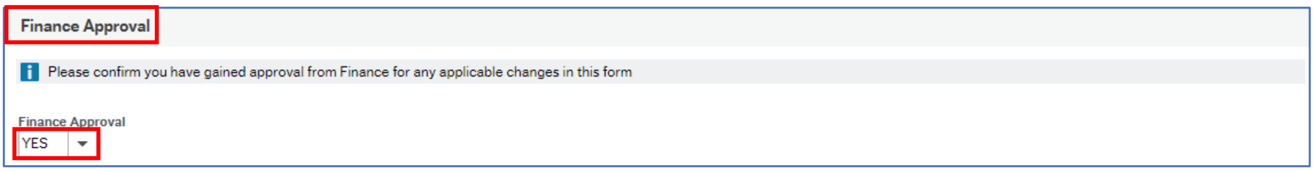
The Contractual Changes Form is completed by the Line Manager requesting the change, and starts with the Contractual Changes Form section by entering the naming convention as outlined at this start of this section.

9.7.1 Resource Details Section



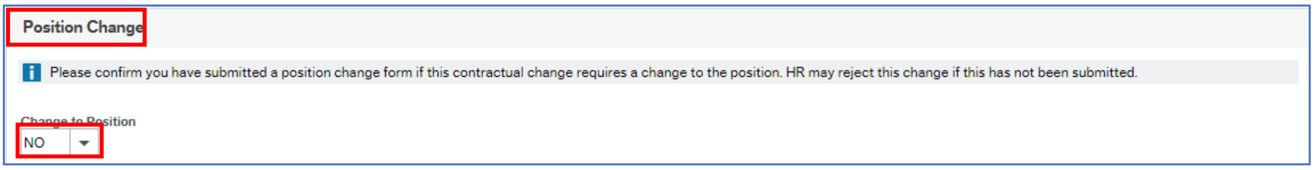
1. **Name** - press **[Space bar]** to select the resource for whom you are completing this form
2. **Position** – if the resource has more than one position, press **[Space bar]** to select the position for which you are completing this form
3. **Effective date changes** – enter by typing or using the calendar when the change is effective from

9.7.2 Finance Approval



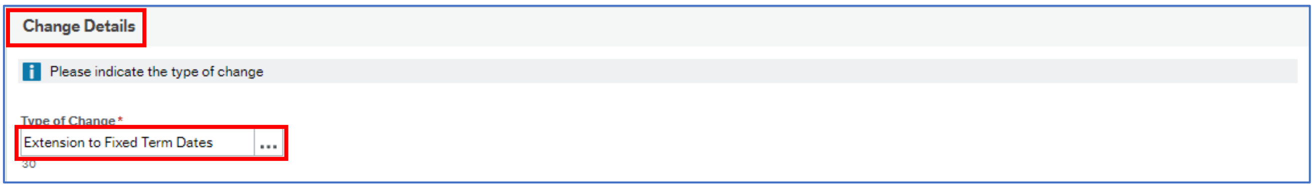
1. **Finance Approval** – select **Yes** or **No** from the drop down. This approval should be obtained before submitting this form for approval

9.7.3 Position Change Section



1. **Change to Position** – select **Yes**, **No** or **NA** from the drop down. If applicable, this should be done before submitting this form for approval

9.7.4 Change Details Section

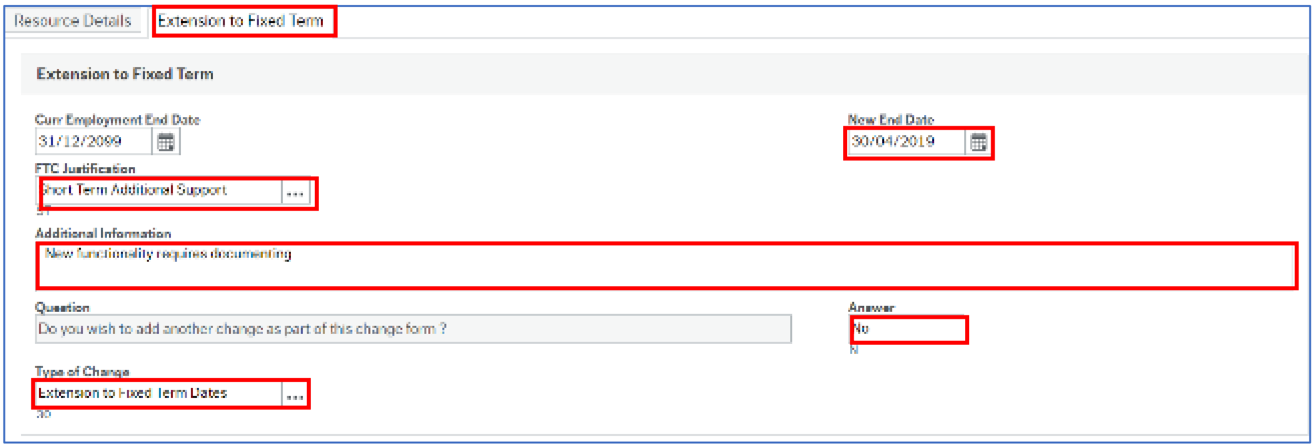


1. **Type of Change –** select the type of change from the drop down

A second tab opens.

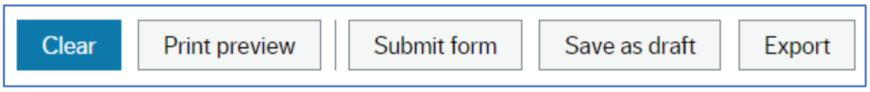
9.7.5 Extension to Fixed Term Tab

A new tab opens where the details of the changes are entered. The current details are populated in read only fields.



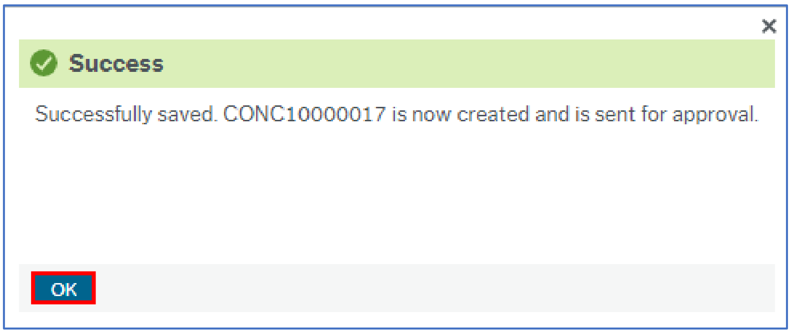
1. **New End Date** – enter the new contract end date
2. **FTC Justification** - press **[Space bar]** to select the justification
3. **Additional Information** – enter any additional details about the change
4. **Answer** – select **Yes** or **No** from the drop down to answer the question
5. **Type of Change** – select the type of change from the drop down

9.7.6 Action Buttons



- **Clear** - clears the contents of the form and removes the **Print preview** button
- **Print preview** - provides a view of the printed form; use **[Ctrl]** + **[P]** to print the form
- **Submit form** - sends the form into workflow for approval
- **Save as draft** - saves the form without sending it into the workflow

The **Success** message opens



1. Click **OK** to close the message

9.8. Induction Form

This form covers the induction checklist for new starters, a resource beginning on an additional position, or a resource transferring into a different position.

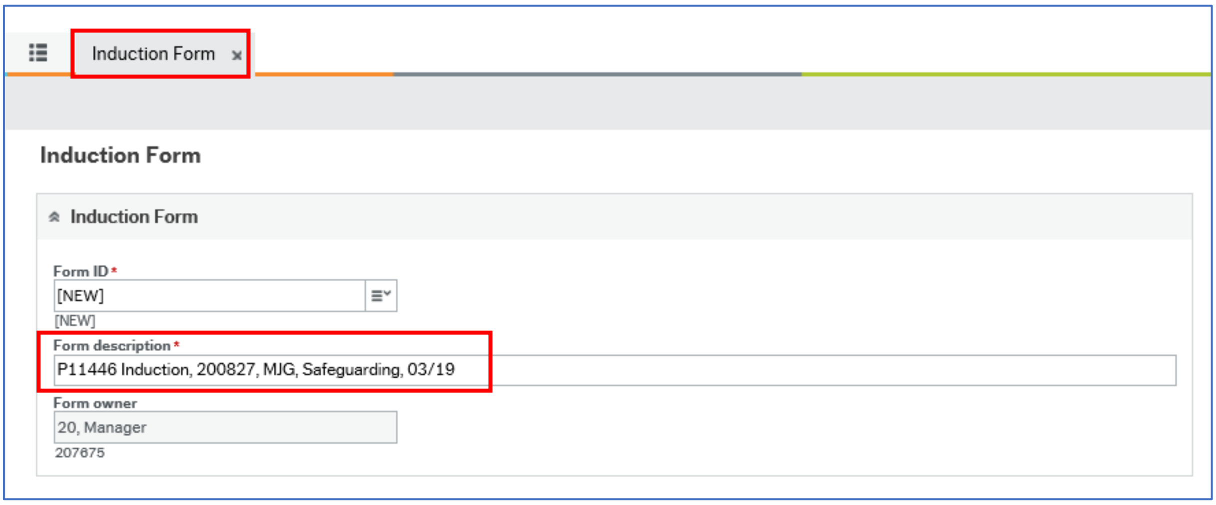
It is completed by the resource's line manager.

There is no approval required for this form, instead, the form can be saved and then later re-opened by the line manager. The form should be saved and then updated as needed throughout the staff member's induction programme.

The form is complete when each section of the Induction checklist tab has been updated with the appropriate **Date completed**.

To create a new induction checklist for your staff member:

1. Navigate to **Forms → New Starter → Induction Form**



2. Enter a meaningful **Form description**, as a title. Use the naming convention *"Description, Resource ID, Initials, Directorate, mm/yy)"*

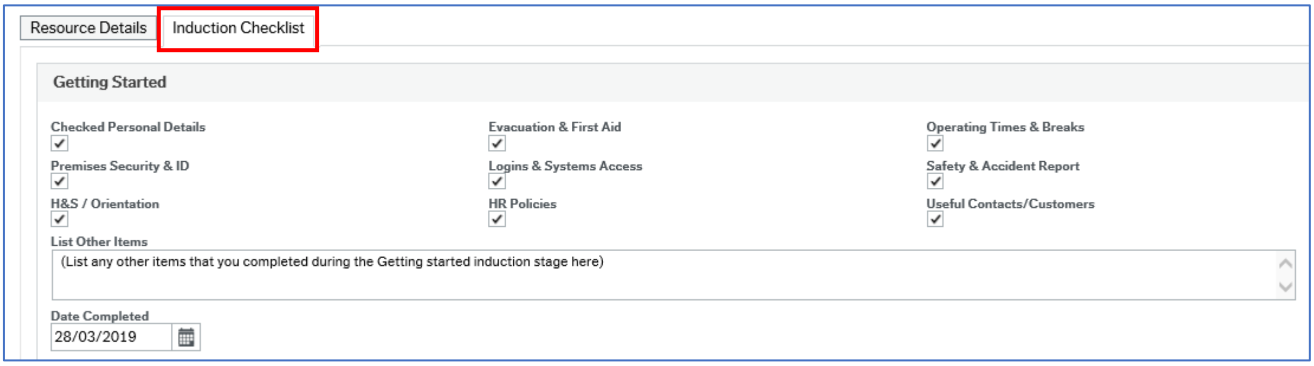
9.8.1 Resource Details Section

1. **Name** - press **[Space bar]** to select the resource for whom you are completing this form

2. **Position** – if the resource has more than one position, or if this field is blank, press **[Space bar]** to select the position for which you are completing this form
3. **Start date** – the date that the staff member started is entered automatically. This could be changed if needed.
4. **Reason for induction** – press **[Space bar]** to select the applicable reason; *New starter*, *Additional post*, or *Transfer.*

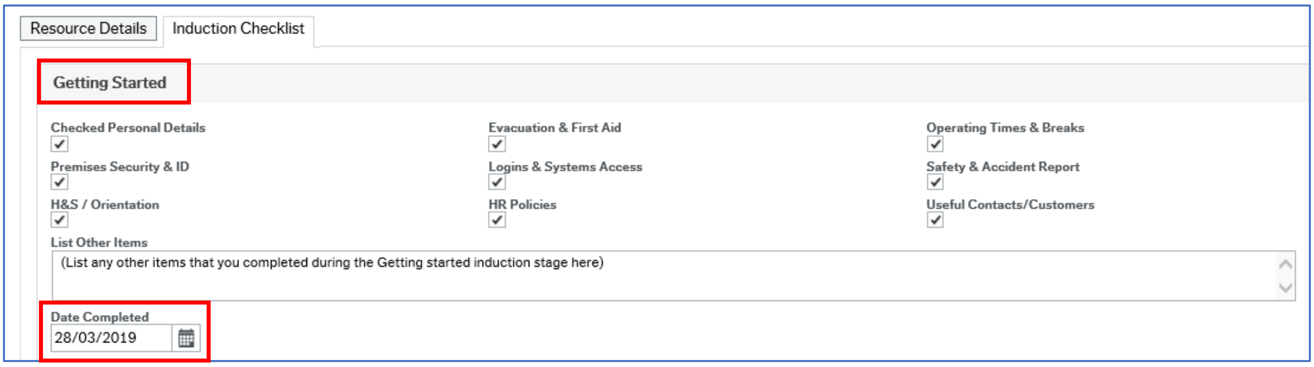
9.8.2 Induction Checklist

1. Choose the **Induction Checklist** tab



This section contains topics to be covered at each stage of a staff member's induction; *Getting Started, Business Area & Role Fam* (Familiarity), and *Technical Training Reqs* (Requirements).

9.8.2.1. Getting Started

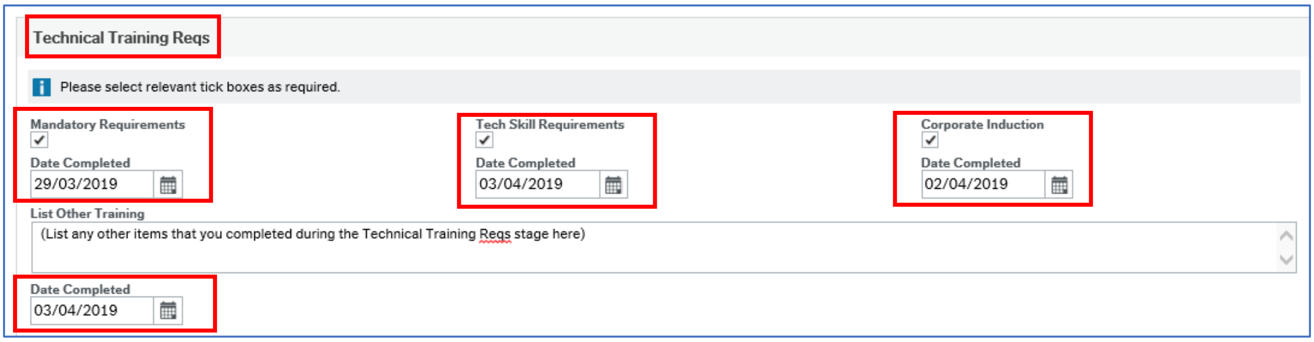


1. Review each topic listed and tick the corresponding checkboxes to confirm that this has been covered with the employee.
2. Enter any other areas/topics covered during the induction with the staff member in the **List Other Items** text field.
3. Enter the **Data completed** for this section.

9.8.2.2. Business Area & Role Fam.

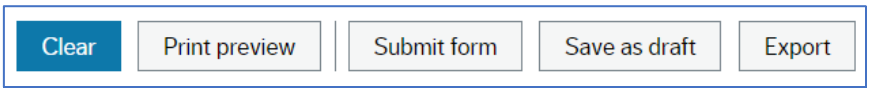
1. Review each topic listed and tick the corresponding checkboxes to confirm that this has been covered with the employee.
2. Enter any other areas/topics covered during the induction with the staff member in the **List Other Items** text field.
3. Enter the **Data completed** for this section.

9.8.2.3. Technical Training Reqs



1. Review the **Mandatory Requirements** for the position with the staff member; when completed/achieved tick the checkbox, and enter the corresponding **Date completed**.
2. Review the **Tech Skill Requirements** for the position with the staff member; when completed/achieved tick the checkbox, and enter the corresponding **Date completed**.
3. Review the **Corporate Induction** for the position with the staff member; when completed/achieved tick the checkbox, and enter the corresponding **Date completed.**
4. Enter any other training completed during the induction with the staff member in the **List Other Training** text field.
5. Enter the **Data completed** for this section.

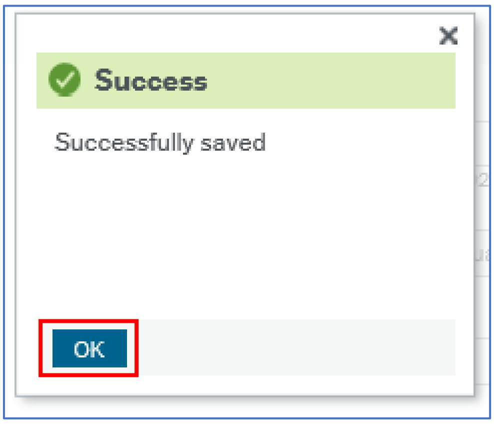
9.8.3 Action Buttons



You can use the Action buttons while you complete the form.

- **Clear** - clears the contents of the form and removes the **Print preview** button
- **Print preview** - provides a view of the printed form; use **[Ctrl]** + **[P]** to print the form
- **Submit form** – this saves the form.
- **Save as draft** – this saves the form as a draft.

1. If you click **Submit form**, or **Save as draft** the *Success* message opens

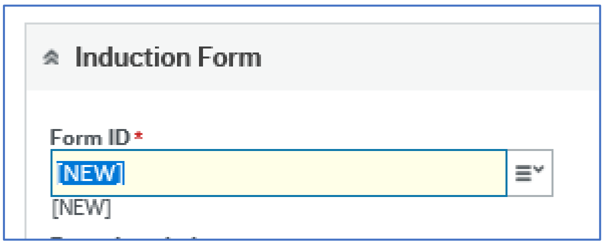


2. Click **OK** to close the message.
3. You can close the form.

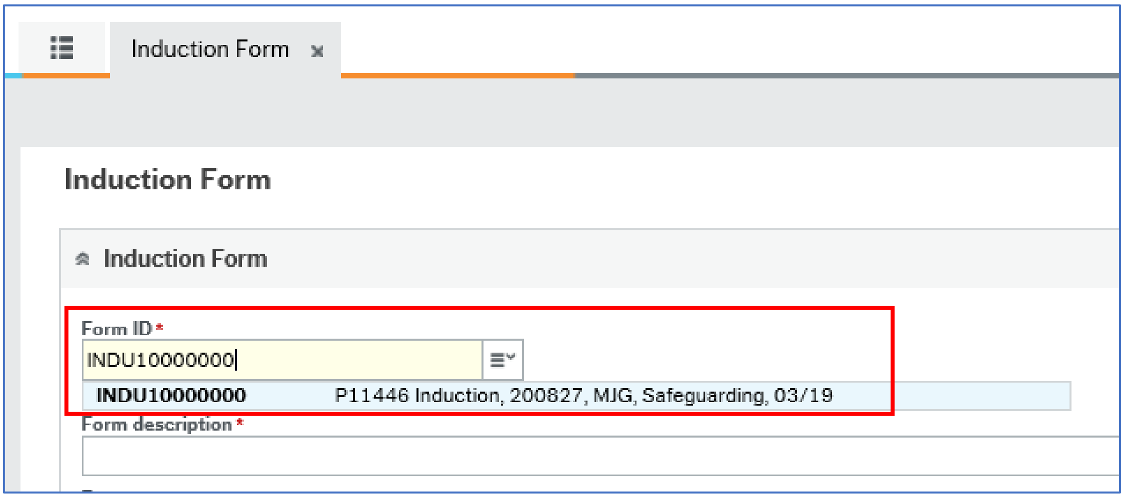
9.8.4 How to re-open a previously saved form.

You need to re-access the Induction form and update the form throughout the staff member's induction programme.

1. Navigate to **Forms → New Starter → Induction Form**
2. To reopen the existing form, you need to first delete the tag *[NEW]* from the **FormID** field.



3. With the cursor in the empty **Form ID** field, press **[Space bar]** to view the list of forms you have previously saved. (Alternatively, you can start typing in part of the form description that you used when you first saved or submitted the form).



4. Select the required form from the list that appears, and press **[Tab].**
5. You can now amend the form as necessary.
6. You can click **Submit form** or **Save as draft** to keep your changes. (Note that if you have previously clicked **Submit form**, then **Save as draft** is no longer an option).

9.9. Probation Form

This form covers the probation process for new starters, or any staff member that requires a period of probation.

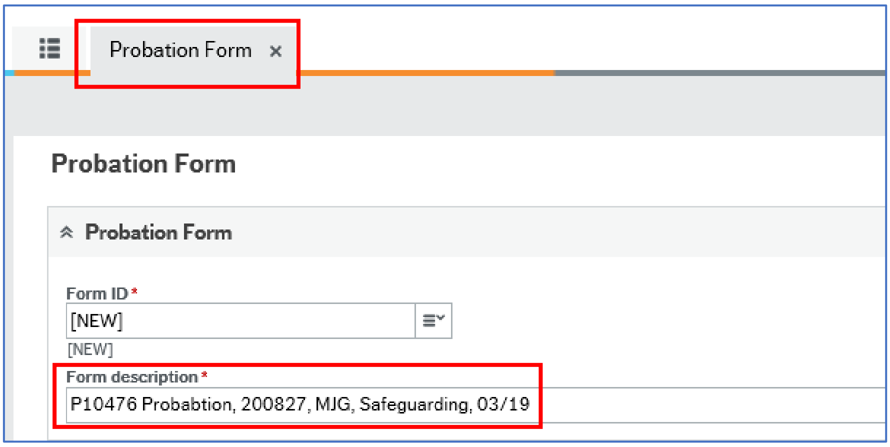
It is completed by the resource's line manager.

The form can be saved and then later re-opened by the line manager. You need to re-open and update the form for each probation review that you complete for the staff member.

If during the probation period the Second or Final Review section of the form is marked with an **Outcome** as *Unsuccessful*, then the form is submitted to the HR team to initiate the staff leaver process. The Line manager must discuss this with their HR Business Partner.

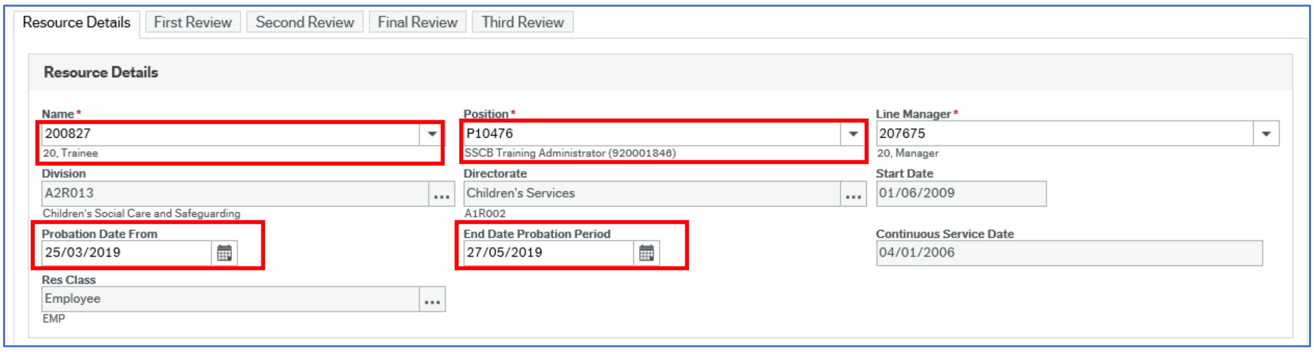
To initiate a probation period for your staff member:

1. Navigate to **Forms → New Starter → Probation Form**



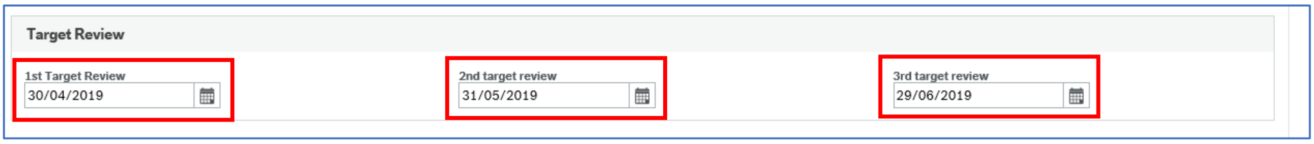
2. Enter a meaningful **Form description**, as a title. Use the naming convention *"Description, Resource ID, Initials, Directorate, mm/yy)"*

9.9.1 Resource Details section



1. **Name** - press **[Space bar]** and select the resource for whom you are completing this form. Press **[Tab].**
2. **Position** – if the resource has more than one position, or if this field is blank, press **[Space bar]** to select the position for which you are completing this form
3. **Probation Date From** – enter the first date of the probation period.
4. **End Date Probation Period** – enter the expected last first date of the probation period.

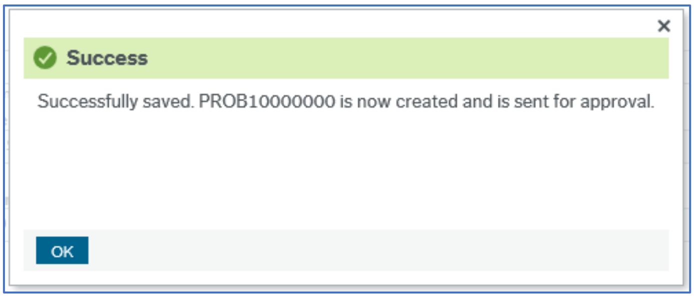
9.9.2 Target Review section



1. Enter the expected dates for the 1st, 2nd and 3rd target review dates.

   You need to keep this information up to date throughout the probation process.

2. You can now click **Submit form** using the action buttons at the bottom of the screen to save a copy of the probation form.



3. Click **OK** to close the message. You can close the form.

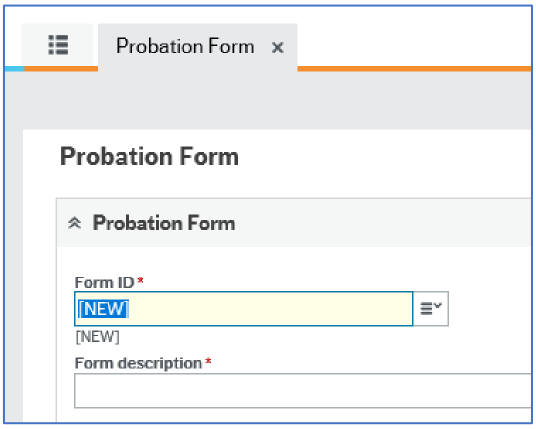
You need to re-access the form, and update the **First Review**, **Second Review**, **Final Review** or **Third Review** tab as appropriate throughout the probation period.

9.9.3 How to re-open a previously saved form.

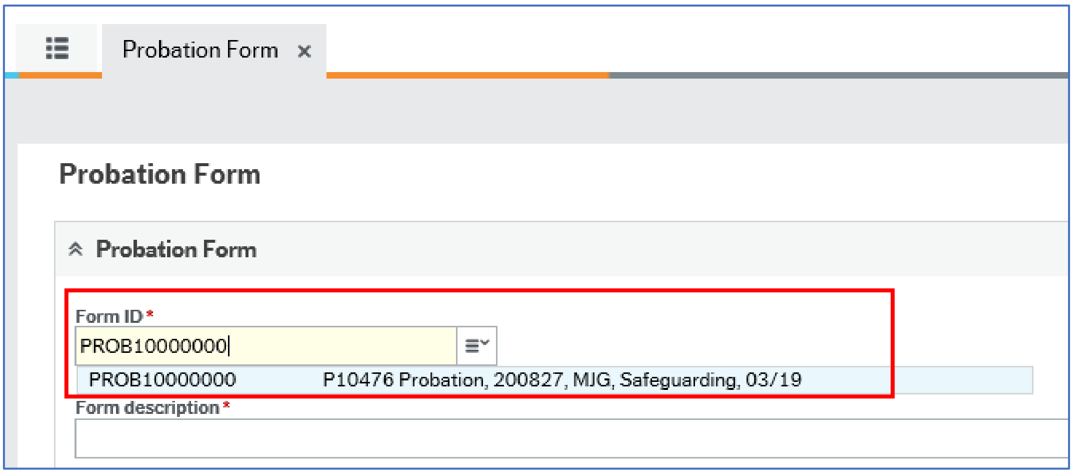
At the appropriate stages of the staff member's probation, you need to re-access the existing probation form and update the results for each review.

To re-open an existing Probation form;

1. Navigate to **Forms → New Starter → Probation Form**
2. To reopen the existing form, you need to delete the tag *[NEW]* from the **FormID** field.



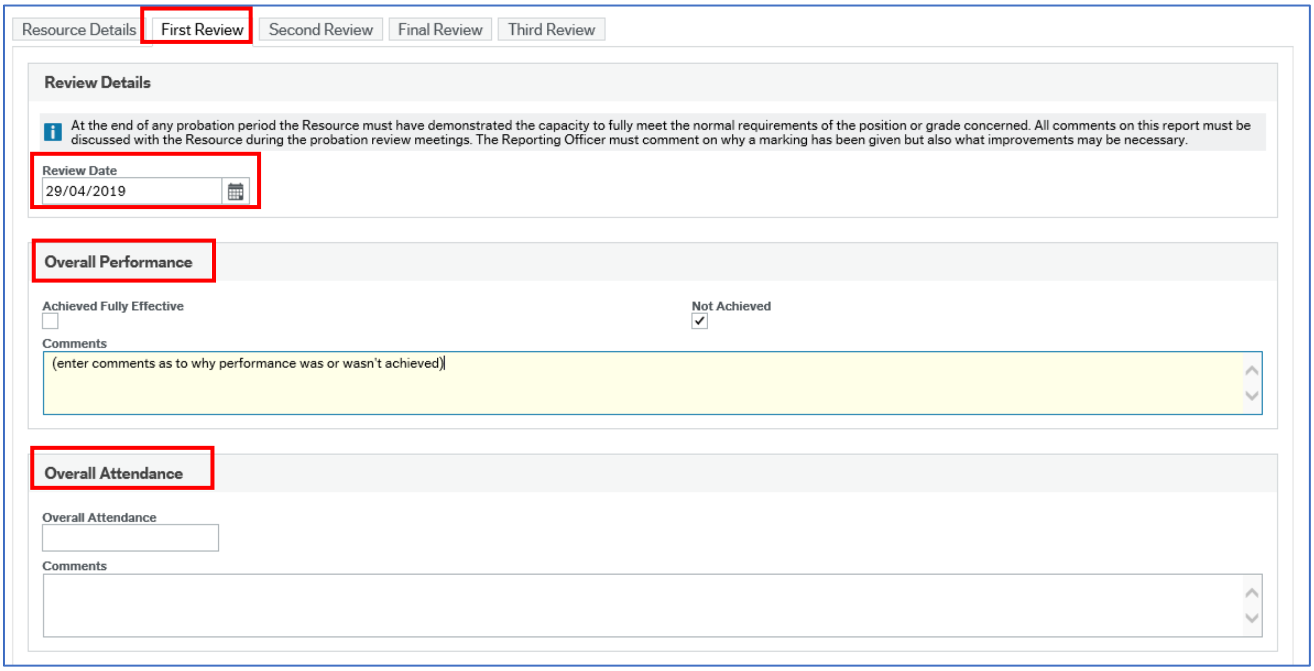
3. With the cursor in the empty **Form ID** field, press **[Space bar]** to view the list of forms you have previously saved. (Alternatively, you can start typing in part of the form description that you used when you first saved or submitted the form).



4. Select the form from the list that appears, and press **[Tab].**
5. You can now amend the form as necessary.
6. You can click **Submit form** or **Save as draft** to keep your changes. (Note that if you have previously clicked **Submit form**, **then Save as draft** is no longer an option).

9.9.4 First Review tab

1. Choose the **First Review** tab.

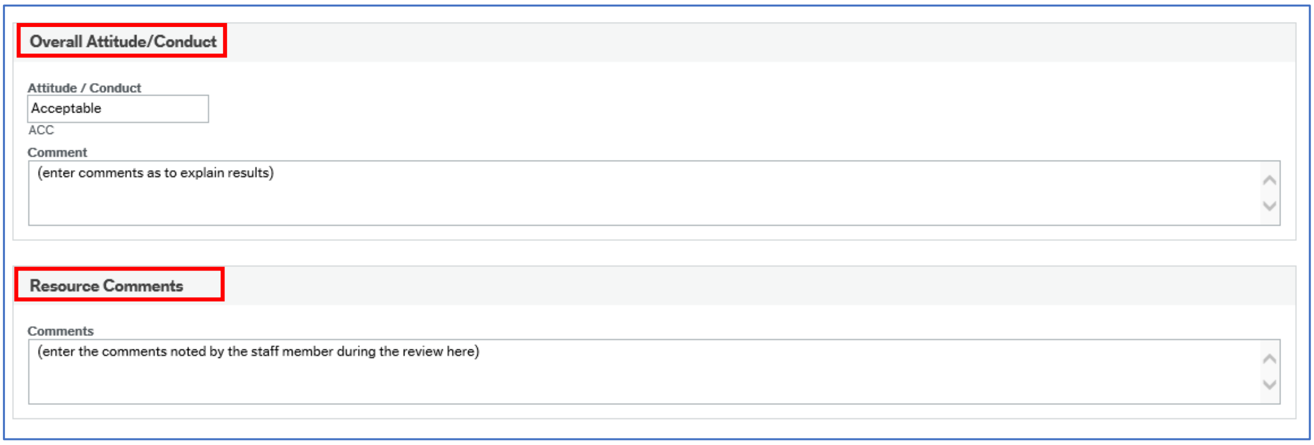


This tab contains sections for you to record the outcomes and comments from the first review.

2. Enter the actual **Review date**.
3. Review the *Overall Performance* section.

a. Mark by ticking the appropriate checkbox if this was **Achieved Fully Effective**, or **Not Achieved**

b. Enter your supporting **Comments**.


Overall Attitude/Conduct
Attitude / Conduct
Acceptable
ACC
Comment
(enter comments as to explain results)
Resource Comments
Comments
(enter the comments noted by the staff member during the review here)

4. Review the *Overall Attendance* section.

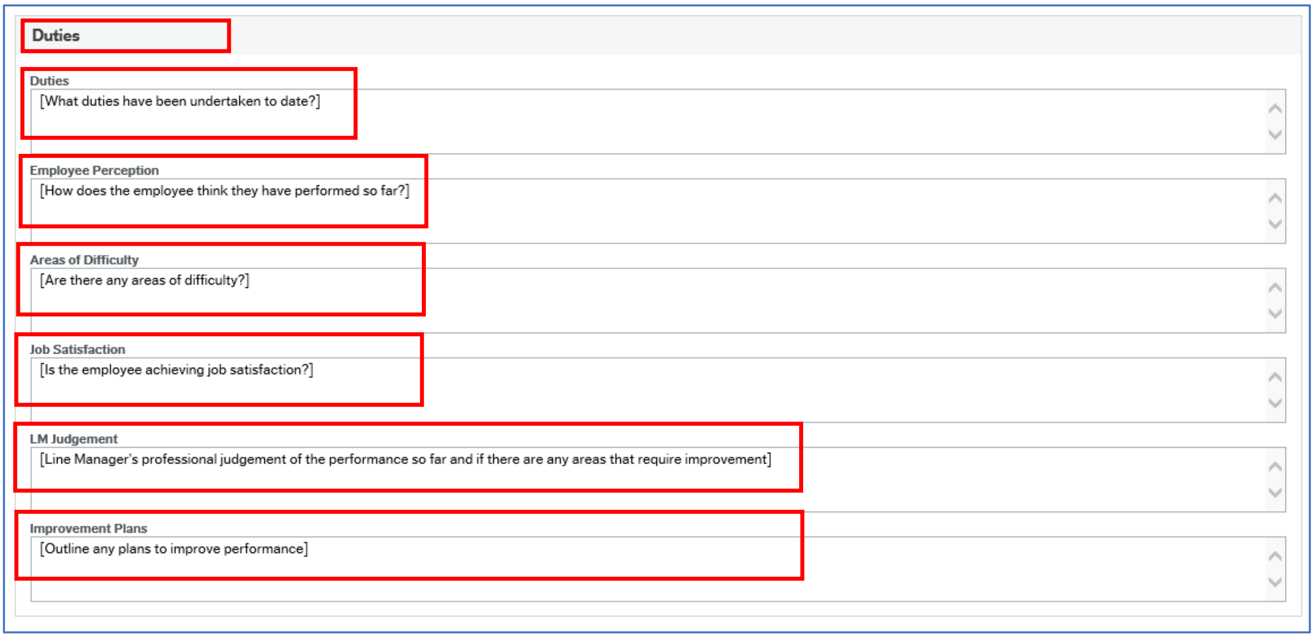
   a. Select the **Overall Attendance** field. Press **[Spacebar]** to view the possibly results. Select the achieved outcome and press **[Tab]**. *(Acceptable, Not acceptable, Not applicable)*.

   b. Enter your supporting **Comments** to explain the outcome.

5. Review the *Overall Attitude/Conduct* section

   a. Select the **Attitude / Conduct** field. Press **[Spacebar]** to view the possibly results. Select the achieved outcome and press **[Tab]**. *(Acceptable, Not acceptable, Not applicable)*.

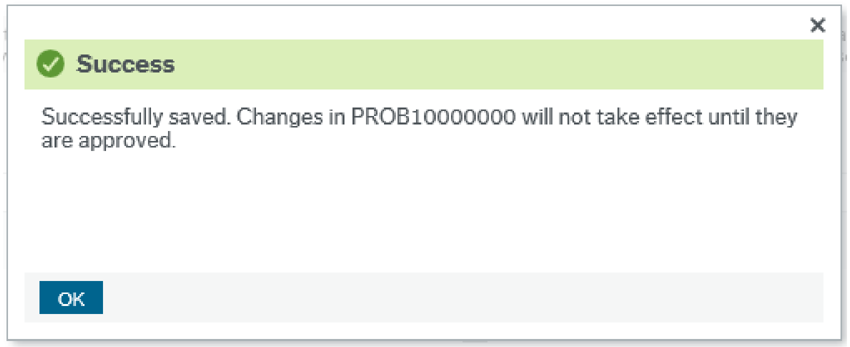
   b. Enter your supporting **Comments** to explain the outcome.


Duties
Duties
[What duties have been undertaken to date?]
Employee Perception
[How does the employee think they have performed so far?]
Areas of Difficulty
[Are there any areas of difficulty?]
Job Satisfaction
[Is the employee achieving job satisfaction?]
LM Judgement
[Line Manager's professional judgement of the performance so far and if there are any areas that require improvement]
Improvement Plans
[Outline any plans to improve performance]

6. Review the *Duties* section:

   a. Provide the details as directed in each field; **Duties, Employee Perception, Areas of difficulty, Job Satisfaction, LM Judgement, Improvement Plan.**

7. You can now click **Submit form** using the action buttons at the bottom of the screen to save the changes to the form.

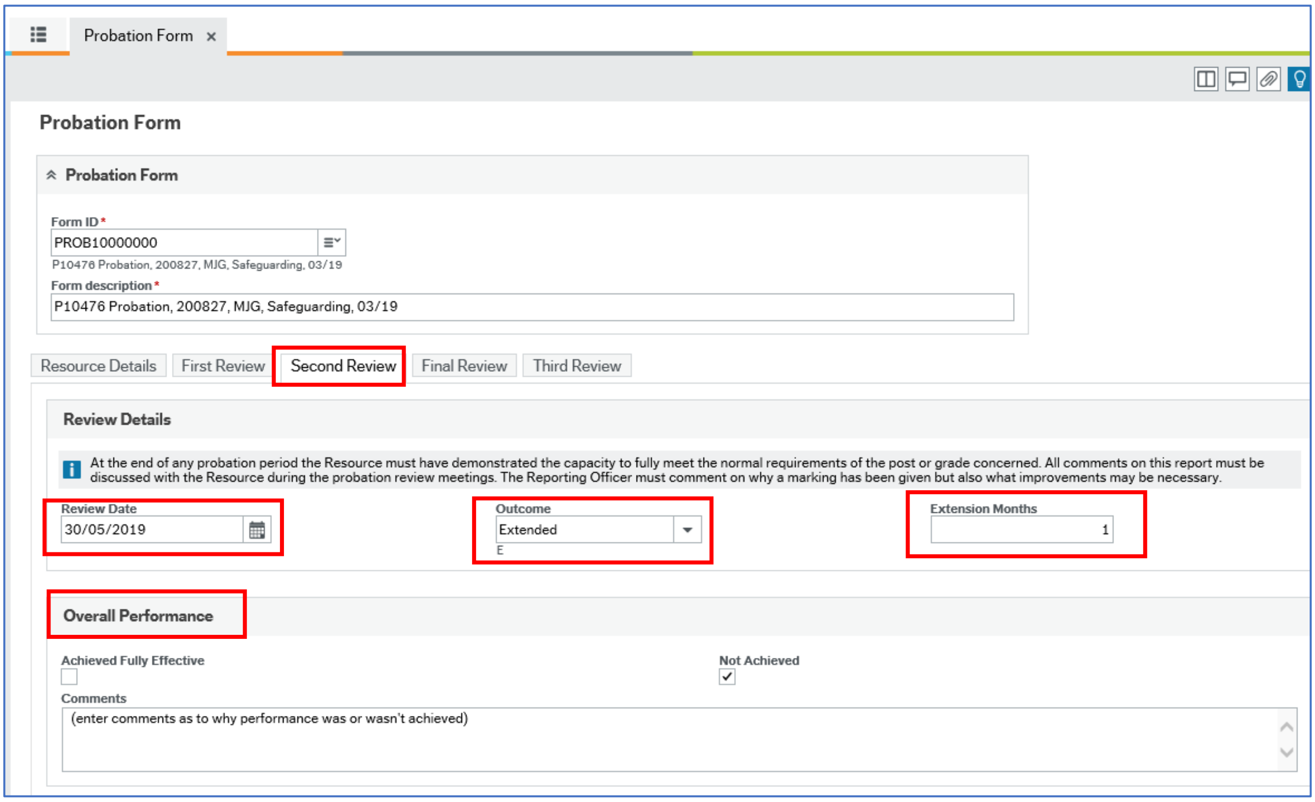


8. Click **OK** to close the message. You can close the form.

You need to re-access the form, and update the **First Review**, **Second Review**, **Final Review** or **Third Review** tab as appropriate throughout the probation period.

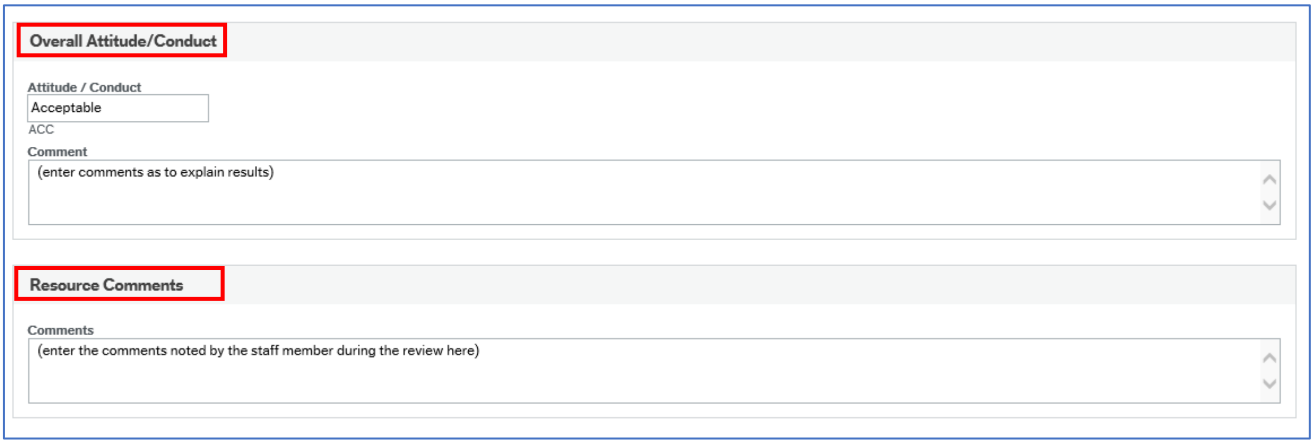
9.9.5 Second Review tab, Final Review tab, or Third review

1. Choose the **Second Review** tab (or **Final Review** or **Third review** as appropriate).



This tab contains sections for you to record the outcomes and comments from the subsequent reviews.

2. Enter the actual **Review date** (or **Extended Review Date** if this is a third review)
3. Use the drop-down menu to choose the appropriate **Outcome**. *(Extended, Successful, Unsuccessful)*
4. If the outcome is an extension, enter the **Extension months.**
5. Review the *Overall Performance* section.
    a. Mark by ticking the appropriate checkbox if this was **Achieved Fully Effective**, or **Not Achieved**
    b. Enter your supporting **Comments**.

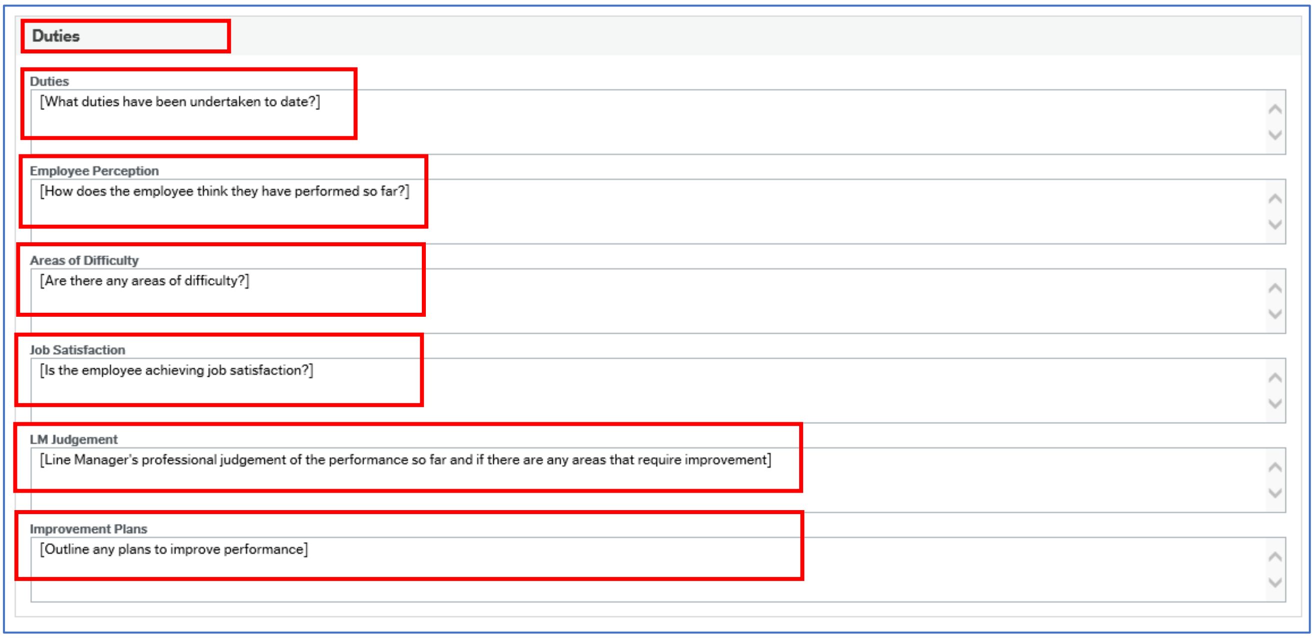

Overall Attitude/Conduct

Attitude / Conduct
Acceptable
ACC
Comment
(enter comments as to explain results)

Resource Comments

Comments
(enter the comments noted by the staff member during the review here)

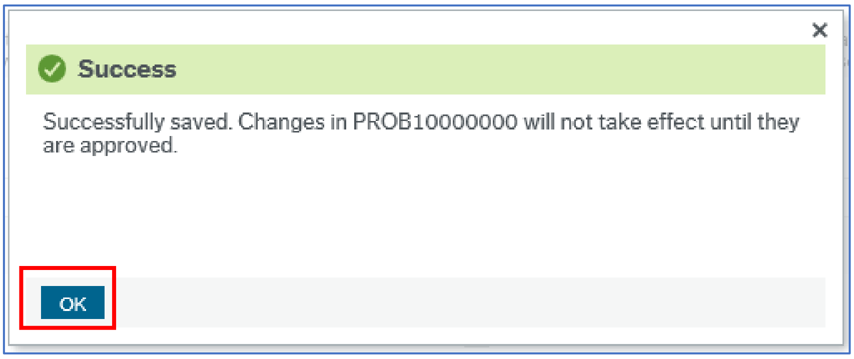
6. Review the *Overall Attendance* section.
    a. Select the **Overall Attendance** field. Press **[Spacebar]** to view the possibly results. Select the achieved outcome and press **[Tab]**. *(Acceptable, Not acceptable, Not applicable)*.
    b. Enter your supporting **Comments** to explain the outcome.
7. Review the *Overall Attitude/Conduct* section
    a. Select the **Attitude / Conduct** field. Press **[Spacebar]** to view the possibly results. Select the achieved outcome and press **[Tab]**. *(Acceptable, Not acceptable, Not applicable)*.
    b. Enter your supporting **Comments** to explain the outcome.


Duties

Duties
[What duties have been undertaken to date?]
Employee Perception
[How does the employee think they have performed so far?]
Areas of Difficulty
[Are there any areas of difficulty?]
Job Satisfaction
[Is the employee achieving job satisfaction?]
LM Judgement
[Line Manager's professional judgement of the performance so far and if there are any areas that require improvement]
Improvement Plans
[Outline any plans to improve performance]

8. Review the *Duties* section
    b. Provide the details as directed in each field; **Duties, Employee Perception, Areas of difficulty, Job Satisfaction, LM Judgement, Improvement Plan.**

9. You can now click **Submit form** using the action buttons at the bottom of the screen to save the changes to the form.



10. Click **OK** to close the message. You can close the form.

You need to re-access the form, and update the **First Review**, **Second Review**, **Final Review** or **Third Review** tab as appropriate throughout the probation period.

9.9.6 Further Probation details

The Line Manager is also required to update the **Probation** tab on the **Personnel→ Personnel → Your Employees** screen for the resource**.**

Line managers can run reports to view details about their staff members that are currently on probation.

1. Navigate to **Reports → Reports across client → Global reports → HR / Payroll → Line Manager Reports → Probation.**
2. Hover your mouse over each report to read the full report name.
3. Click to open a report.
4. Click **Search** to view the results.

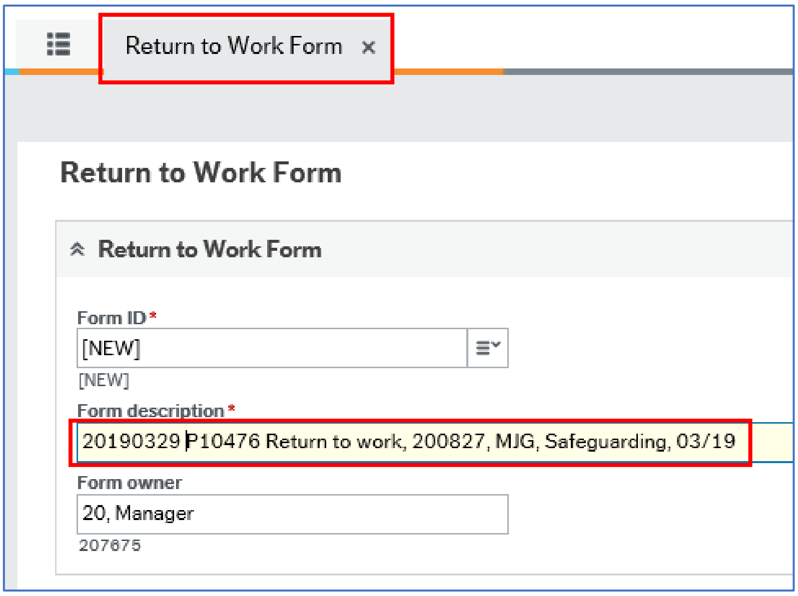
9.10. Return to Work Form

This form covers the Return to Work interview and administration required for a staff member returning after a period of sickness absence. It is to be completed after any period of sickness absence for a staff member.

It is completed by the resource's line manager.

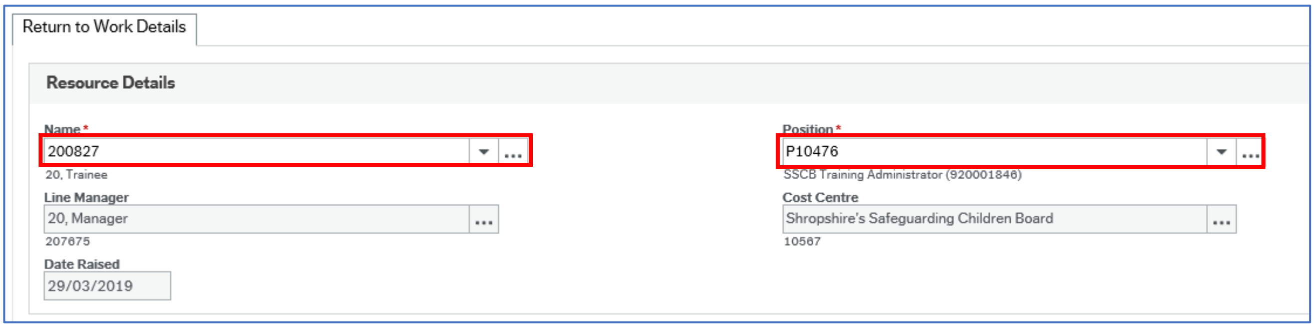
To record a Return to Work for your staff member:

1. Navigate to **Forms → Absence (SC) → Return to work**



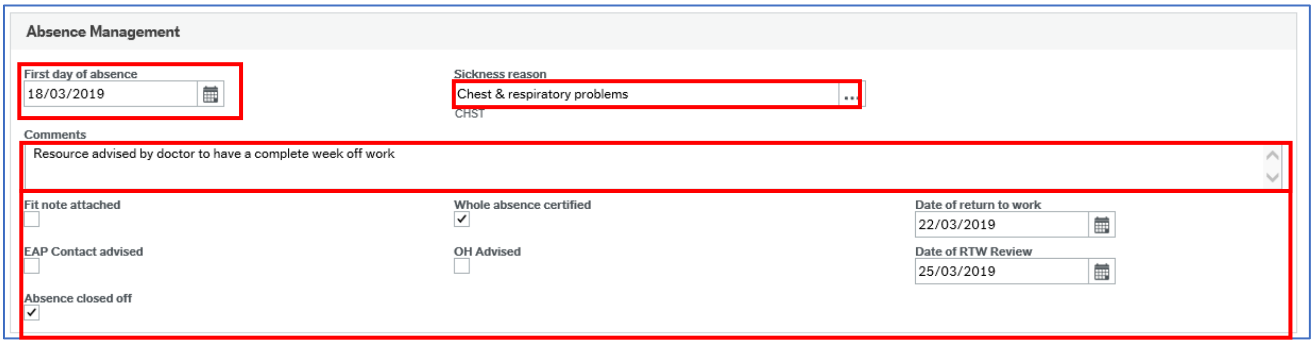
2. Enter a meaningful **Form description**, as a title. Use the naming convention *"Description, Resource ID, Initials, Directorate, mm/yy)"*

9.10.1 Resource Details section



1. **Name** - press **[Space bar]** to select the resource for whom you are completing this form
2. **Position** – if the resource has more than one position, or if this field is blank, press **[Space bar]** to select the position for which you are completing this form
3. **Date Raised** – this is filled in automatically.

9.10.2 Absence management section

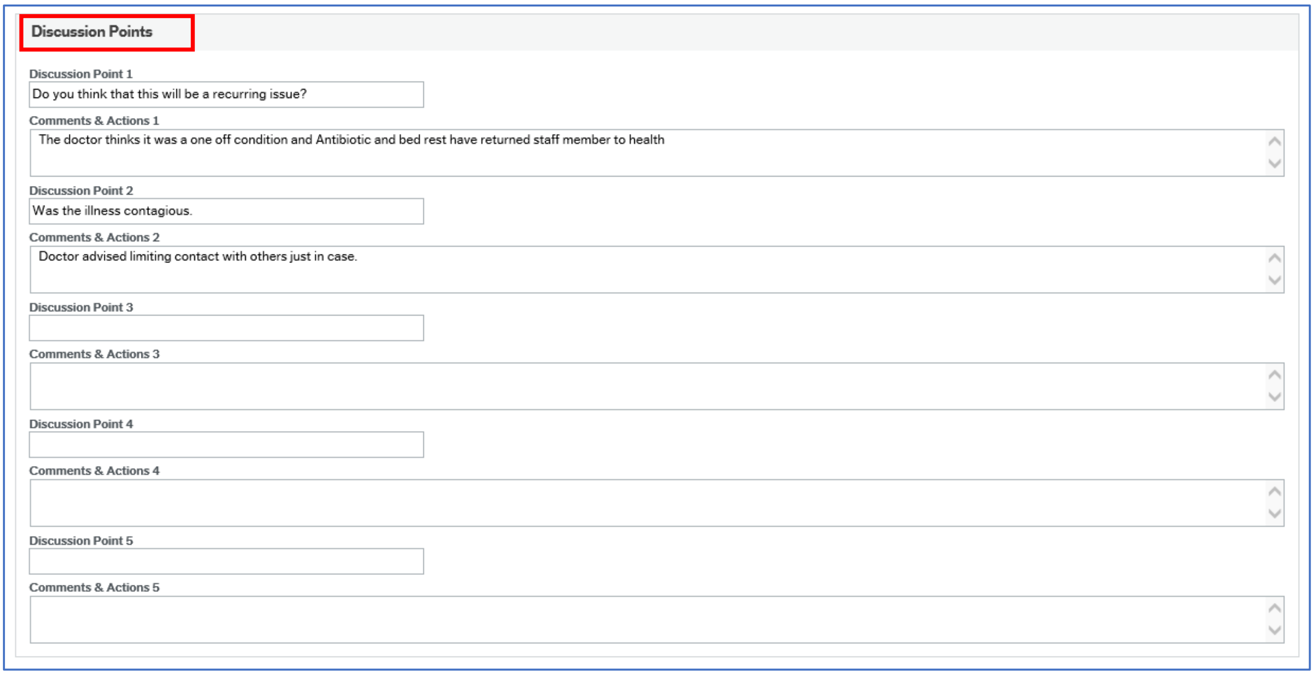


1. Enter the **First day of absence**.
2. **Sickness reason** - use the drop-down menu to choose the relevant reason.
3. Enter any supporting **Comments** as needed.
4. **Fit note attached** - tick this checkbox as confirmation that a fit note if appropriate was attached to the specific sickness absence record(s) in Business World.
5. **Whole absence certified** - tick this checkbox as confirmation that certification is available for the full absence, and that this has been attached to the specific sickness absence record(s) in Business World.
6. **Date of return to work** - enter or select the date that the staff member returned to work.
7. **EAP Contact advised** - tick this checkbox as confirmation if the employee assistance programme contact has been advised.
8. **OH Advised** - tick this checkbox as confirmation if the Occupations Health team have been advised.
9. **Date of RTW Review** - enter or select the date that the return to work review was conducted.
10. **Absence closed off** - tick this checkbox as confirmation that the specific absence record(s) in Business World have been updated appropriated. The **Open ended absence** check box has been unticked, and the appropriate **Date to** entered (this is the last date of absence for the staff member).

You need to record sickness absence in Business World using the **Your employment > Your employment > Absences** screen. See section Staff Sickness - Recording Sickness, page 24 for details.

When a staff member returns, you need to update the specific absence record in Business World using the **Your employment > Your employment > Absences** screen. See section Sickness Absences - Adjusting a Sickness Record , page 26 for details

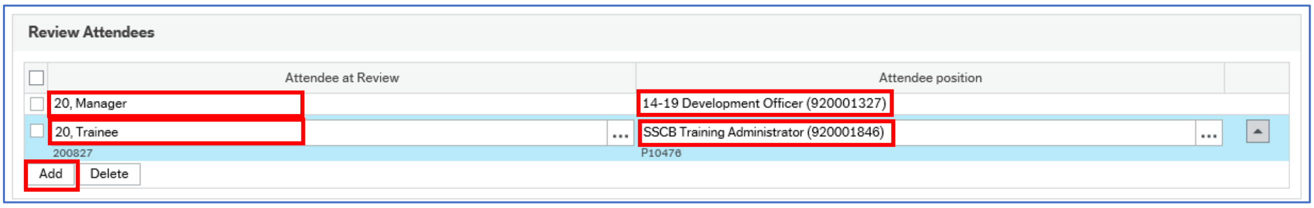
9.10.3 Discussion Points



Use this section to record any **Discussion Points**, and specific related **Comments & Actions**

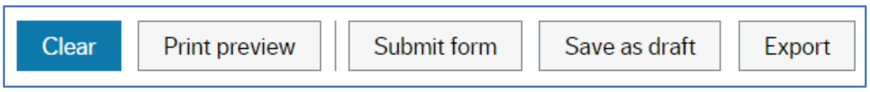
9.10.4 Review Attendees

Enter the details of the staff members present during the review.



1. Click **Add**. A new row is added to the table.
2. Click the **Attendee at review** field.
3. Enter part of the name of the staff member attending.
4. Click to select them from the list that appears, and press **[Tab].**
5. In the **Attendee position** field, enter the code or description of the staff member's position. Click to select the position from the list that appears, and press **[Tab].**
6. Click **Add** to create a new row in the table, and repeat the staff above to list any other attending staff members.
7. If you need to delete a row, tick the checkbox on the left for the row to be deleted, and click **Delete**.

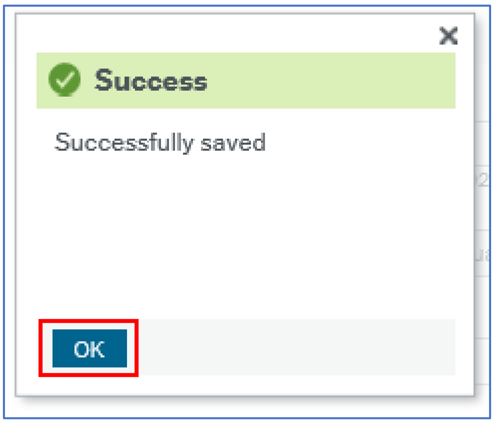
9.10.5 Action Buttons



You can use the Action buttons while you complete the form.

- **Clear** - clears the contents of the form and removes the **Print preview** button
- **Print preview** - provides a view of the printed form; use **[Ctrl]** + **[P]** to print the form
- **Submit form –** this saves the form. Note that the form will be *Closed* and cannot be further amended if you were to attempt to re-open an existing form.
- **Save as draft –** this saves the form as a draft.

4. If you click **Submit form**, or **Save as draft** the *Success* message opens

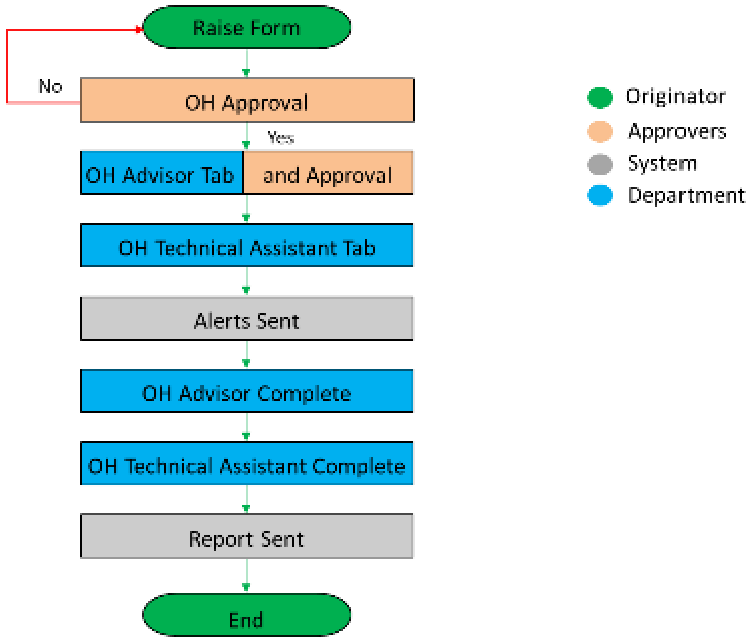


5. Click **OK** to close the message.
6. You can close the form.

9.11. OH Referral Form

9.11.1 OH Referral Process

The OH Referral Process begins with the form being raised and the OH Referral Tab being completed by Line Managers and then following the steps outlined below.



- **OH Approval** – on being submitted the form is workflowed to the OH Advisor, who checks whether the OH Referral Tab has been completed correctly and has sufficient information to proceed. If not, the form is rejected with an explanation
- **OH Advisor Tab** – when the form is correct and the OH Advisor has determined the course of action; the details are entered on the OH Advisor Tab. The form is again submitted and it is workflowed to the OH Technical Assistant
- **OH Technical Assistant Tab** – the OH Advisor determination is actioned by the OH Technical Assistant and appointment details sent out
- **Alerts** - the HRO and the resource are notified that a referral has been made

At this point the form may go through several updates by both the OH Advisor and the OH Technical Assistant until the case is complete.

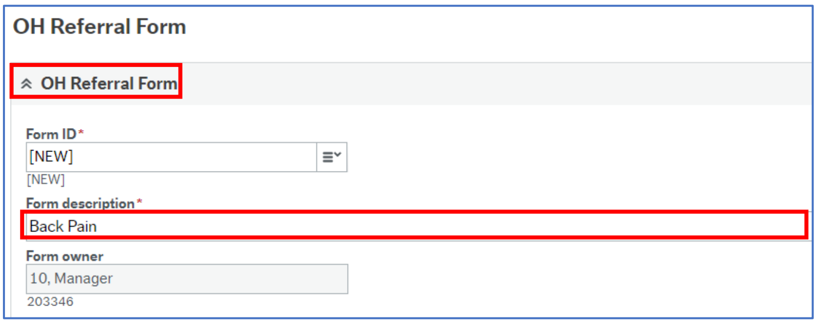
- **OH Advisor Complete** – the OH Advisor will triage the referral and inform the OH Technical Assistant what type of appointment is needed
- **OH Technical Complete** – the OH Tech Assistant will confirm on the form, then date when it was sent out to the resource
- **Report Sent** – the referral is complete and the final report is sent out

The OH Referral Form can be raised by Line Managers.

1. Navigate to **Forms → Case Management (SC) → OH Referral Form**

On opening, the form has ten sections.

9.11.2 OH Referral Form Section

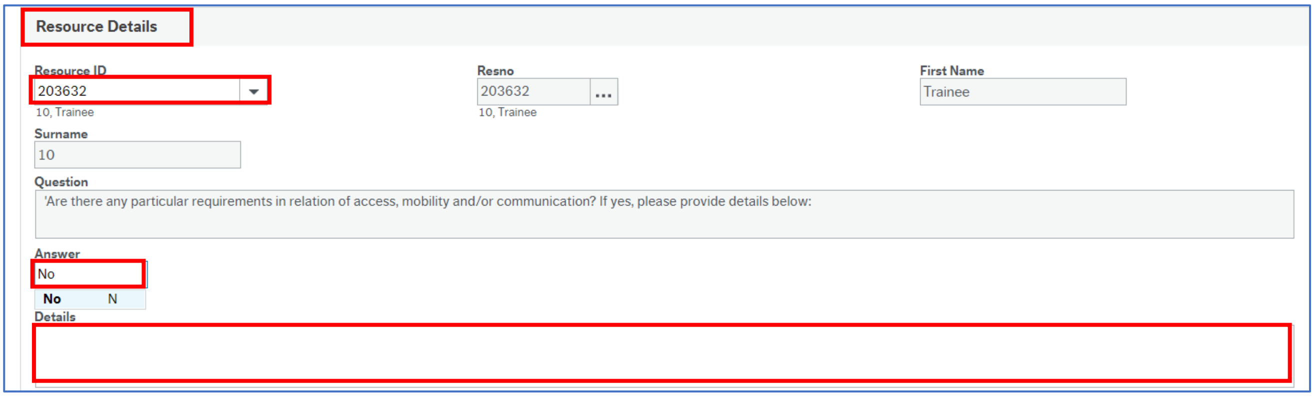


Form description* - enter the **Form description** as:

- **Resource Number**
- **Initials**
- **Directorate** or **School**
- **MM/YY**

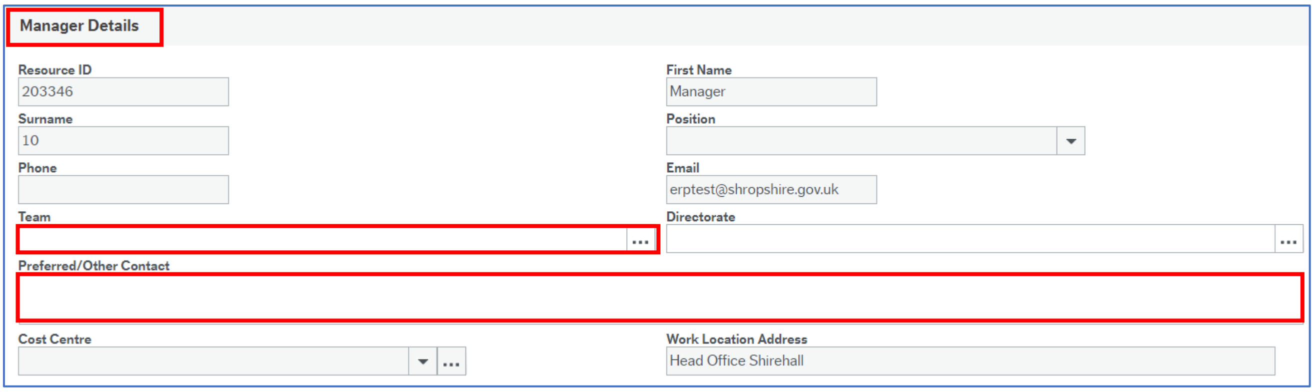
1. **Form owner** – is read only and is populated from the user record

9.11.3 Resource Details Section



1. **Resource ID** – use type ahead or select from the drop down
2. **Resno** – is populated from the Resource ID selected
3. **First Name** – is populated from the Resource ID selected
4. **Surname** – is populated from the Resource ID selected
5. **Question** – is read only
6. **Answer** – press [**Spacebar**] to select **Yes** or **No** in response to the Question above
7. **Details** – if the answer to the question is Yes, enter the details of the requirement

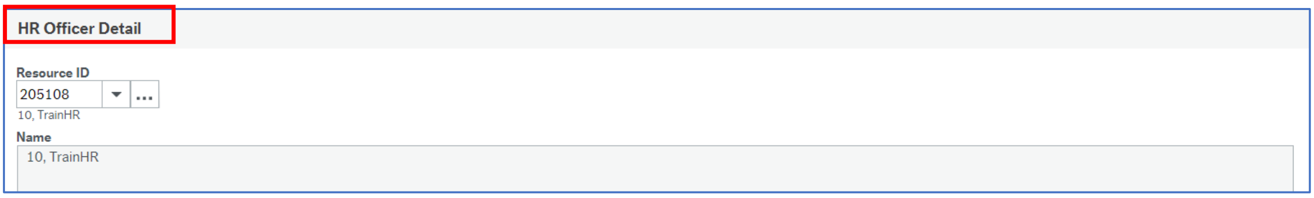
9.11.4 Manager Details Section



The first six fields, Resource Id, First Name, Surname, Position, Phone and Email, in this section are populated from the Resource ID selected in the OH Referral Section.

1. **Team** – use the lookup to select the team
2. **Directorate** – is populated from the Team selected
3. **Preferred / Other Contact** – details of other contact can be entered here

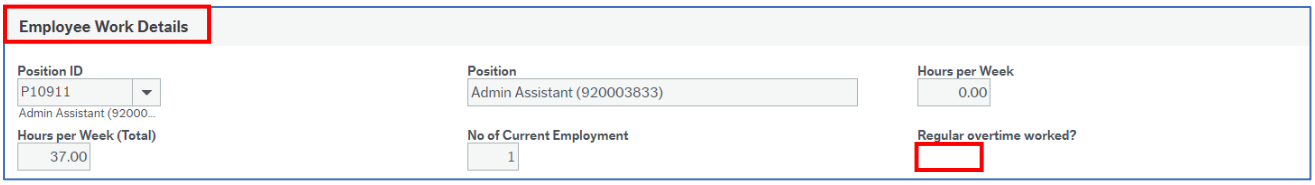
9.11.5 HR Officer Deatils Section



1. **Resource ID** – use type ahead or select from the drop down

The other fields in this section are populated from the Resource ID selected.

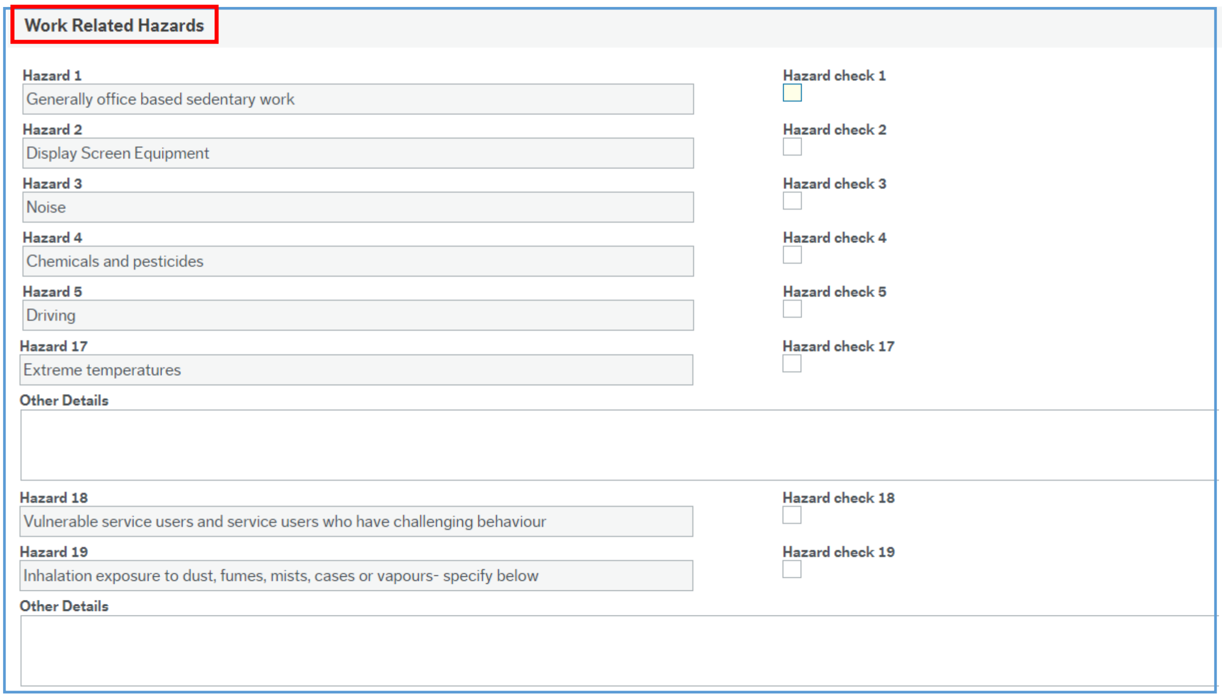
9.11.6 Employee Work Details Section



This section is read only except for one field.

1. **Regular overtime worked?** – press [**Spacebar**] to select **Yes** or **No**

9.11.7 Work Related Hazards Section



This section contains a series of 17 questions. Select the check box for each hazard that applies.

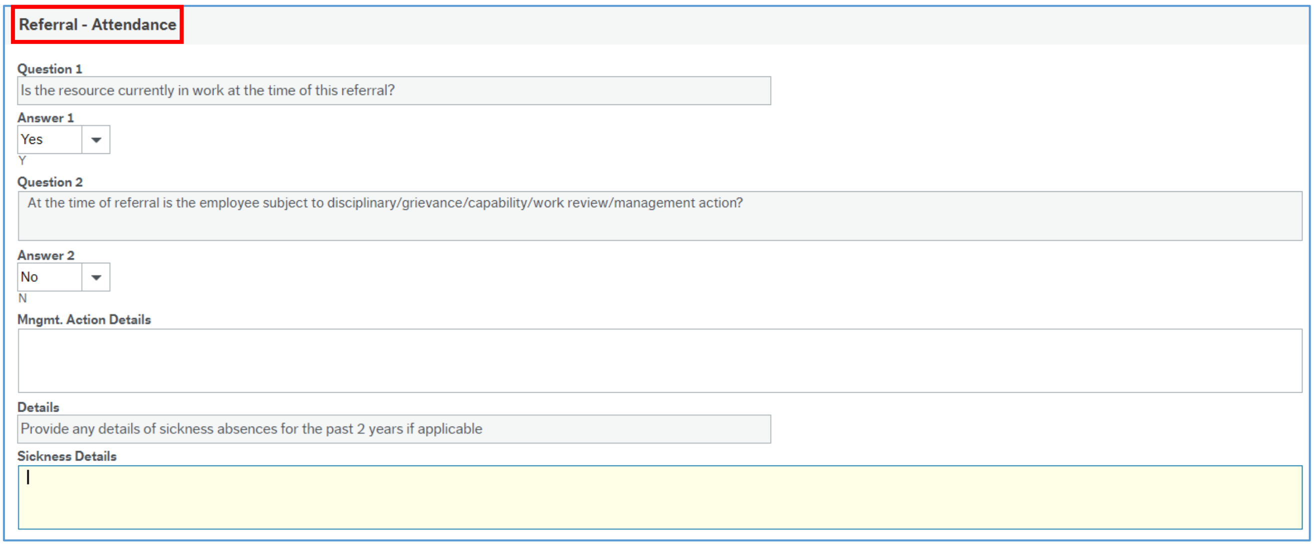
Other Details

1. **Other Details** – enter the details of each hazard selected

There are a further two questions. Select the check box for each hazard that applies.

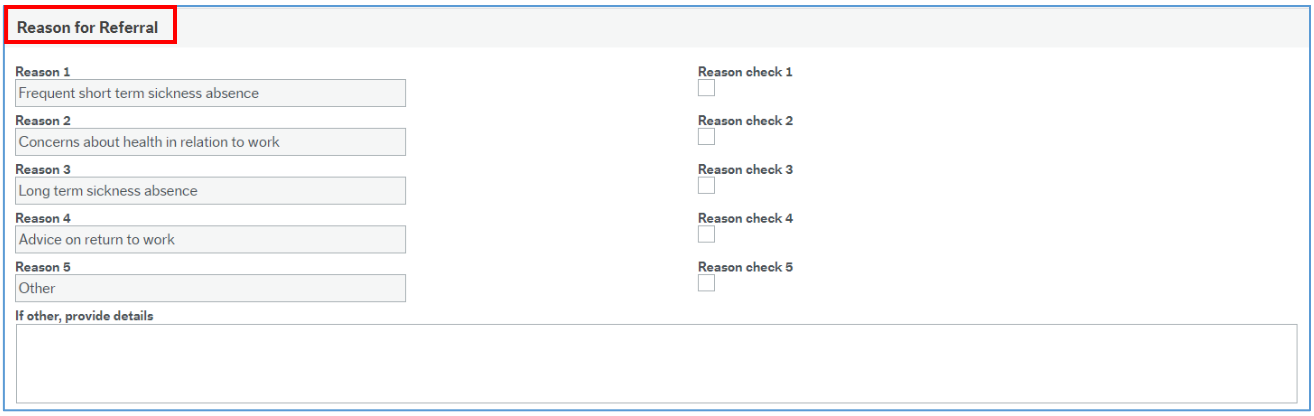
2. **Other Details** – enter the details of each of these hazards selected

9.11.8 Referral - Attendance Section



1. **Question 1 –** the question is read only
2. **Answer –** press [**Spacebar**] to select **Yes** or **No** or select from the drop down
3. **Question 2 –** the question is read only
4. **Answer –** press [**Spacebar**] to select **Yes** or **No** or select from the drop down
5. **Magmt. Action Details** – enter the details of any management action taken
6. **Details** – the request is read only
7. **Sickness Details** – enter details of any relevant periods of sickness in the past 2 years

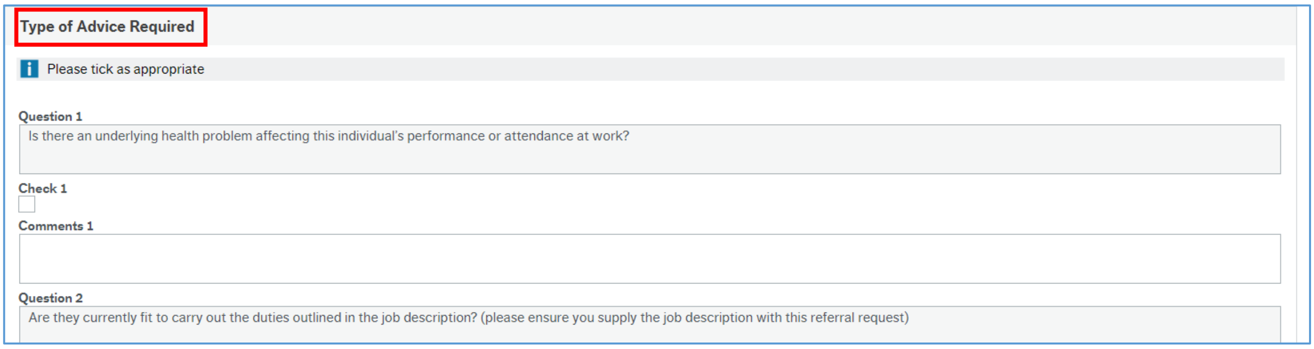
9.11.9 Reason for Referral Section



This section contains a series of 5 questions. Select the check box for each reason that applies.

1. **if other, provide details** – enter the details of other reason if reason 5 is selected

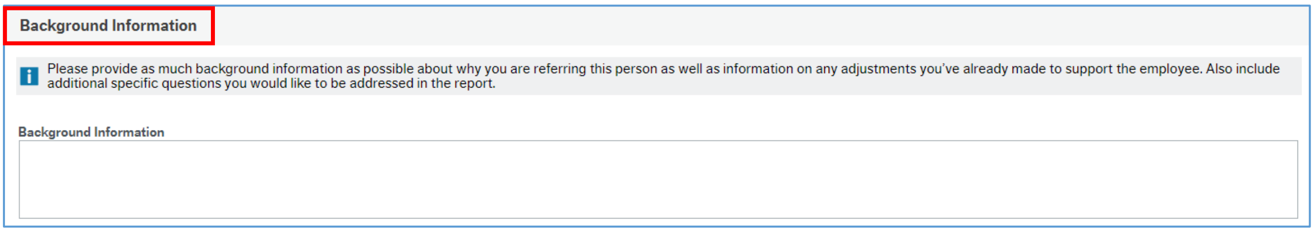
9.11.10 Type of Advice Required Section



This section contains a series of 8 questions. Select the check box for each type of advice required then add any relevant comment for each one selected.

1. **Additional Info –** use this field to detail any other advice you might need or questions that may need answering

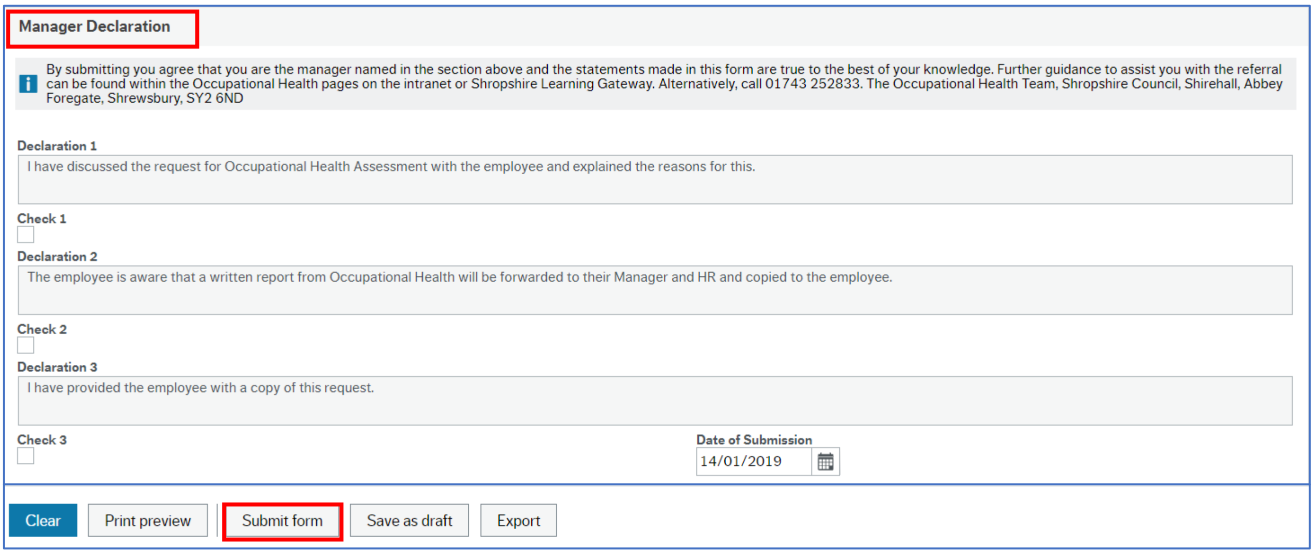
9.11.11 Background Information Section



1. **Background Information –** provide as much background information as possible including reasons for referral, actions already taken

9.11.12 Manager Declaration Section

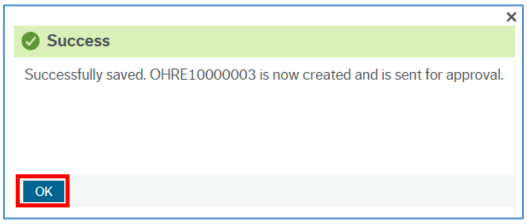
Each of the statements in this section should be selected as all of them should be complied with, in every case.



1. Select each of the declarations, when they have been actioned

2. **Date of Submission –** select the date using the calendar
3. Click **Submit form**

The **Success** popup opens.



1. Click **OK**

9.12. Forms and Scenarios – Overview

Scenario	Form Required	Documents to Attach
Recruitment		
If a new post is required that isn't in your establishment	New Position Form	Job Evaluation if not already existing / Job Description / Person Specification
Job Evaluation of an existing post - restructure	Position Grade Evaluation (Manager)	Job Evaluation / Job Description / Person Specification
Vacancy to be advertised	Right to Recruit Form	Job Advert / Job Description / Person Specification /any additional information you would like the applicant to receive. (this may save admin time emailing applicants information)
New Starter		
Informing IT about new starter to request access to system	IT Request Form	
Induction Form to be used on first day where employee will input bank details directly onto Business World. This will alert payroll that the new resource has started.	Induction Form	P45
Probation set up dates for new starters	Probation form	

Amendment to contract		
Hours/working weeks/change to contract type TEMP to PERM) /exension to fixed term dates	Contractual Change form	
Additional payment / additional increment	Contractual Change form	
Change in work schedule	Contractual Change form	
Transfer of post within Directorate	Transfer Within Team Form	
Use this form if changes are required to a position, not a resource	Position change form	
Leaver		
Resource leaving a post	Leaver Notification form	Resignation letter is no longer required as a form has been completed
Resource leaving establishment	Leaver Notification form	Resignation letter is no longer required as a form has been completed
Leaver checklist	Leaver Checklist form	
Exit Interview	Exit Questionnaire	

10. Reports

Reports work in one of two ways:

- **Fixed Criteria Reports** - open the report and click Search
- **Variable Criteria Reports** - open the report, enter Selection Criteria to filter the results, then click Search

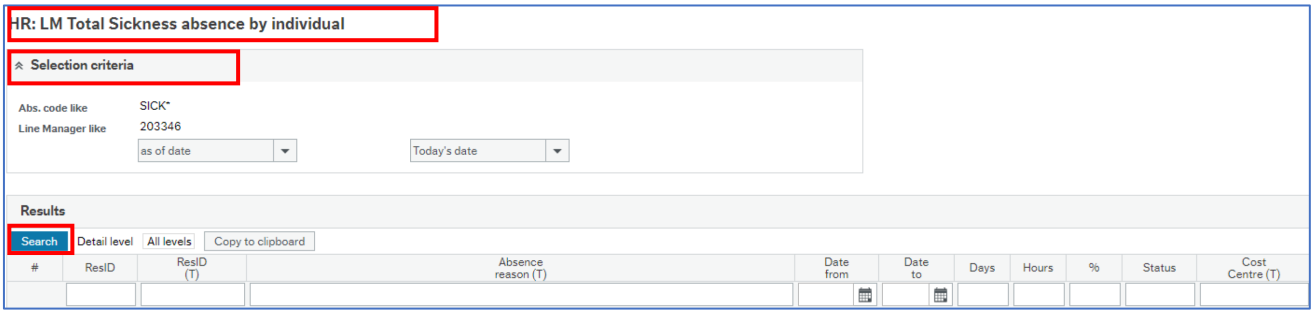
10.1. Fixed Criteria Report

This example uses the Total Sickness absence by individual report, which is a fixed criteria report.

1. Navigate to

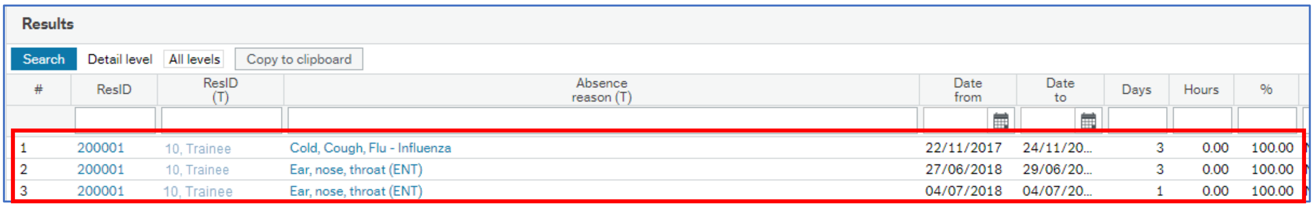
Reports → Reports across clients → HR/Payroll → Line Manager reports → Absence

2. Select **HR: LM Total Sickness absence by individual**



The **Selection criteria** is read only.

3. Click **Search**



The results are listed below the headings. Any field that is blue, is a hyperlink which will open a new tab with more detail about the field.

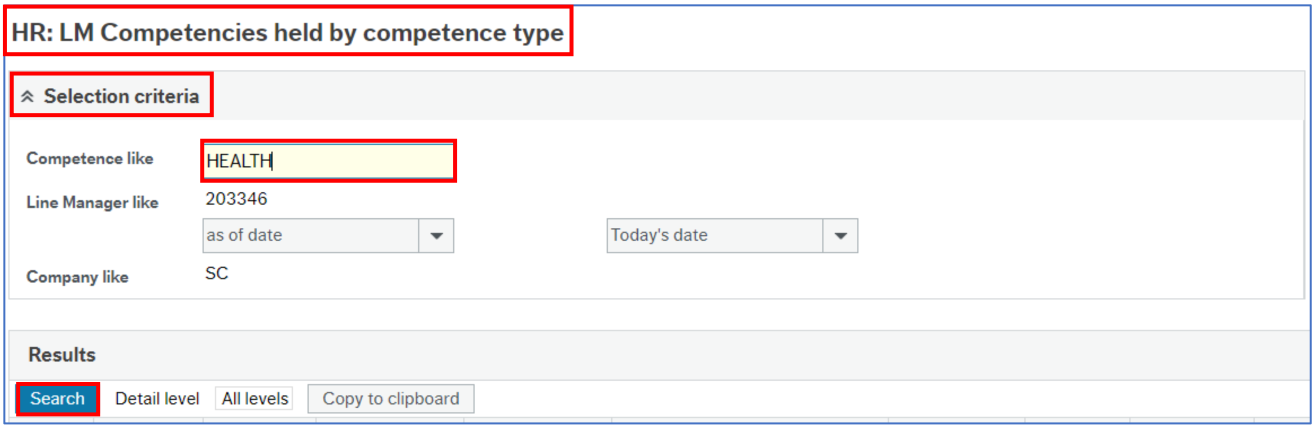
10.2. Variable Criteria Report

This example uses the Total Sickness absence for a resource report, which is a variable criteria report.

1. Navigate to

Reports → Reports across clients → HR/Payroll → Line Manager reports → Absence

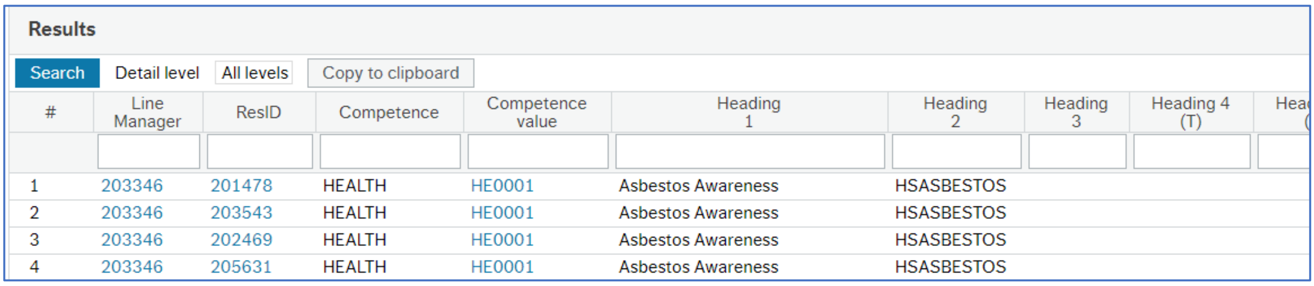
2. Select **HR: LM Total Sickness absence for a resource**



The **Selection criteria** section has fields in which criteria to report on can be determined. There may be multiple fields and they may work using lookups or calendars.

In this example, there is a single variable criteria field allowing you to specify the competence type.

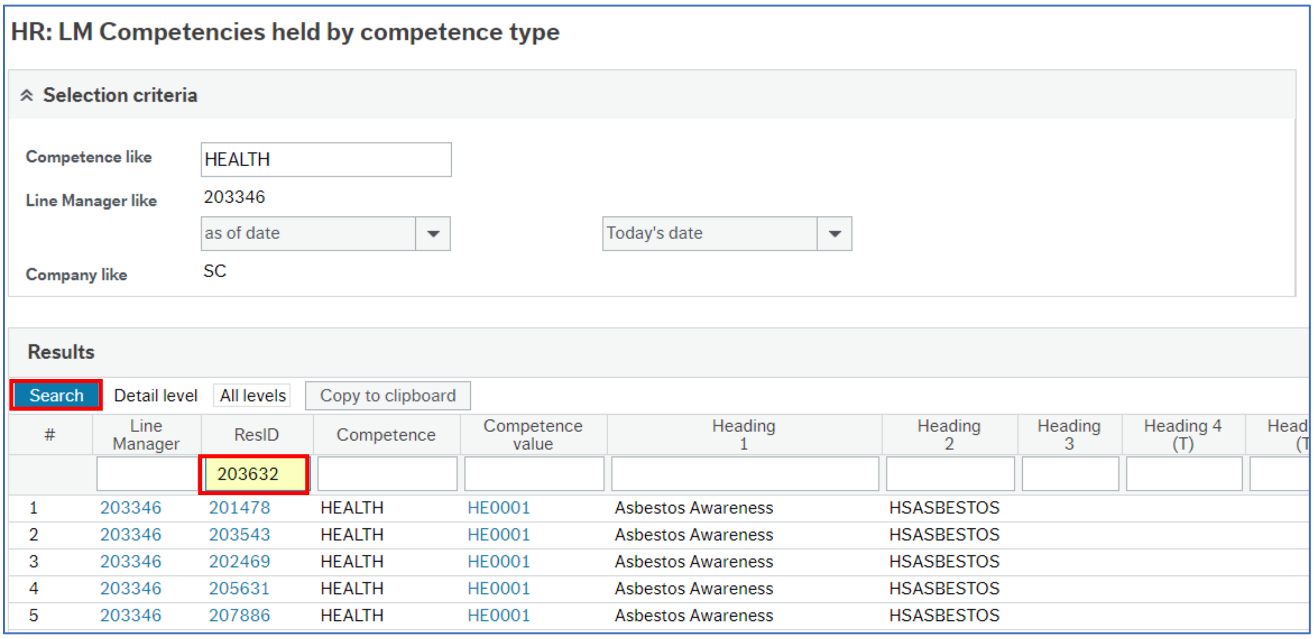
3. Enter the criteria
4. Click **Search**



The results displayed are only for the criteria entered.

10.2.1 Filtering Results

Report results can be filtered by entering criteria in the Filter Bar and clicking Search. In this example the results are filtered on Absence reason.



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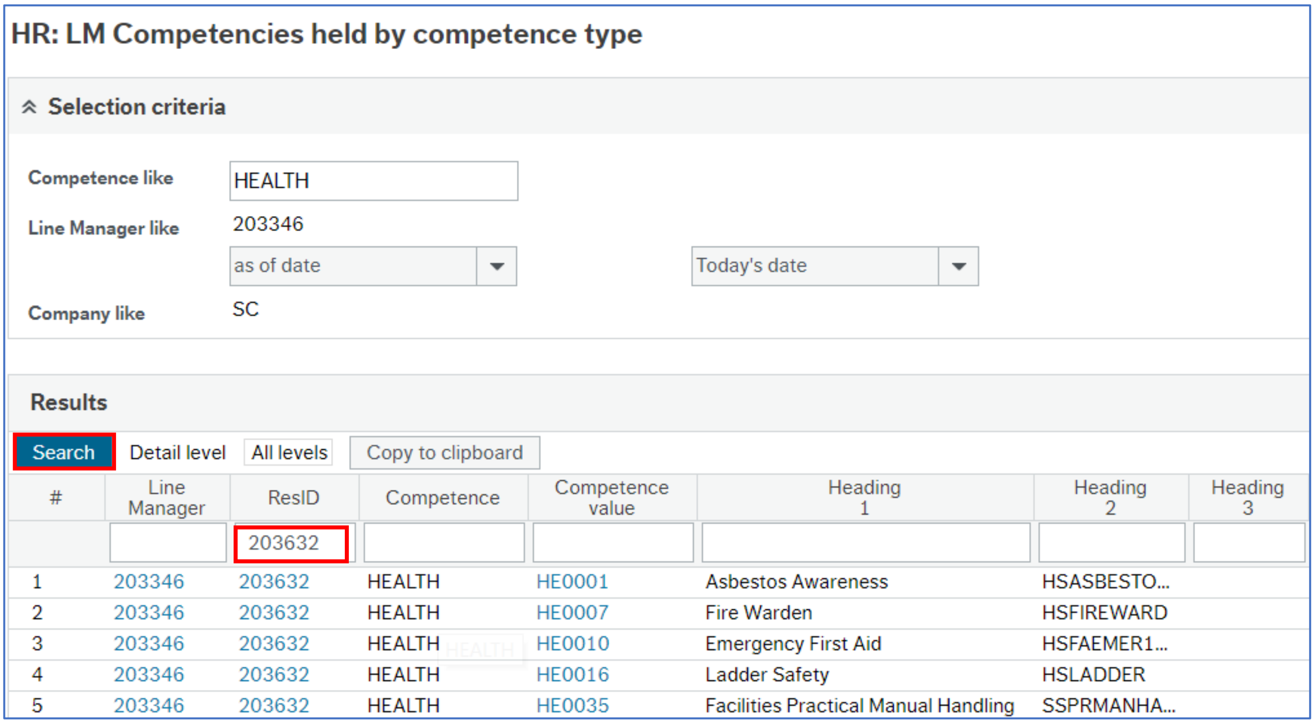
1. Enter the filter criteria in the required field
2. Click **Search**



HR: LM Competencies held by competence type

Selection criteria

Competence like: HEALTH
Line Manager like: 203346
as of date | Today's date
Company like: SC

Results

Search | Detail level | All levels | Copy to clipboard

#	Line Manager	ResID	Competence	Competence value	Heading 1	Heading 2	Heading 3
		203632					
1	203346	203632	HEALTH	HE0001	Asbestos Awareness	HSASBESTO...	
2	203346	203632	HEALTH	HE0007	Fire Warden	HSFIREWARD	
3	203346	203632	HEALTH	HE0010	Emergency First Aid	HSFAEMER1...	
4	203346	203632	HEALTH	HE0016	Ladder Safety	HSLADDER	
5	203346	203632	HEALTH	HE0035	Facilities Practical Manual Handling	SSPRMANHA...	

The results now only include those that match the filter criteria.

Filter criteria may be entered before the report is run to produce pre-filtered results.