Human Resource Information System

User Manual
For

The Anglican Medical Services (AMS) of the Anglican Diocese of Namibia

Sponsored by:

APPROVALS AND AUTHORIZATIONS

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2 ACRONYMS, ABBREVIATIONS AND TERMINOLOGY

Acronyms/ Abbreviation	**Explanation**
AMS	Anglican Medical Services
MoHSS	Ministry of Health and Social Services
CEUs	Continuing Education Units
HRIS	Human Resources Information Systems
iHRIS Suite	The software developed by Capacity, a USAID funded initiative, which consists of three (3) modules namely Manage, Qualify and Plan.
iHRIS Manage	Human Resource Information System developed to manage health workers information.
Job	An job refers to occupation on the organizational structure.
Position	Each job will have at least one position. Position refers to the number of people that can be appointed per job e.g. for the job Medical Superintendent, the approved number of position is 1, so there will be only 1 position for a Medical Superintendent
Cadre	Cadre refers to a classification for clinical health workers.
Job Classification	Job classification refers to a classification for administrative workers
Vacant	This is status information for a position – when a position has a status of open, it means it is vacant.

Filled	This is status information for a position – when a position has a status of closed, it means it is filled.
Discontinued	This is status information for a position – when a position has a status of discontinued, it means it is no longer part of the approved Staff Establishment.
Staff Establishment	This is another name for the organization's structure or organization's chart.
Department	Department and section as per organizational structure have been combined in the system e.g. The Department Administrative Support Services with the subsection Finance have been setup as Admin – Finance.
OSS	Open Source Software
PHP	PHP: Hypertext Preprocessor
HR	Human Resource
CEUs	Continuing Education Units

3 OVERVIEW

IHRIS Manage consists of several key modules designed to store and report position, employee and job applicant information:

- **User Management:** Create and manage password-protected user accounts to control access to the system. Accounts are role-based so that non-authorized user actions and data sets are hidden from the user. Only users with Administrator rights have access to this function.

- **System Configuration:** Turn on and off modules and set options for each module to customize the system and its features. Only users with Administrator rights have access to this function.

- **Database Management:** Design a standard data structure by creating lists of items to be tracked in the database such as geographical locations, offices and facilities. Only users with Administrator rights have access to this function.

- **Position Management:** Create positions with standardized descriptions, codes and qualifications within the organizational structure and manage the hiring, transfer and promotion process.

- **Employee Management:** Match an employee to a position, record important information about an employee and maintain a record of the employee's complete work history with the organization.

- **In-service Training Management:** Track in-service trainings that employees have completed and assess competencies and continuing education credits earned from training (turned off by default).
- **Search:** Search for employee and applicant records in the system.

- **Custom Reporting:** Create reports to aggregate and analyze data in a variety of ways to answer key management and policy questions as well as generate staff lists and directories.

4 SYSTEM SUMMARY

4.1 Configuration

- **Architecture:** The system has client-server architecture and is web-based. Although the system will only be accessible to AMS users initially, the architecture allows that it can be accessible via the internet providing certain security measures have been put in place.
- **OS, DB, and Programming Language:** The system is developed to run on Open Source Software (OSS) which keeps the licensing costs to a minimum. iHRIS Manage is installed on Ubuntu, an OSS that is totally free and developed in South Africa. The database is MySQL and the programming language used to develop the software is PHP, both also OSS.
- **User Interface:** The system has a graphical user interface which makes it intuitive to use for users that are already familiar with computers.

4.2 Accessing iHRIS Manage

IHRIS Manage is a database management system which can be accessed from a computer or from a shared network.

4.3 Accessing the System on a Computer:

To access this system on your computer, it must have been installed with an iHRIS Manage icon on your desktop. Double click on the iHRIS Manage icon and wait for the system to start then login. Another way of accessing the system is to right click on the iHRIS Manage icon, select open and wait for the system to start before login.

4.4 Accessing the System from a Shared Network

When accessing iHRIS Manage on the network, you need the address of the computer where iHRIS Manage is installed. This could be on the internet or local area network (LAN).

For the districts, the system is accessed on LAN by typing **(IP address/**AMS**)** in the web browser (e.g. Mozilla Firefox, internet explorer).

4.5 System Security

4.5.1 Physical Security

The server will be located at AMS.

Users are responsible for the physical security of their own computers, and have to ensure that when they leave their workstations unattended, they need to either log out of iHRIS Manage or lock their workstations so that no-one can access the system using their log-on information.

4.5.2 Logical Security

IHRIS Manage provide for 4 levels of user access as described below.

- **Administrator:** has full access to the system and can create new users and change users' passwords.

- **Executive Manager:** Generates reports in order to analyse data; can search for and view any record, but cannot enter data into the system. Cannot create new users or change users' passwords.

- **HR Manager:** Manages system data, including correcting data and managing data selection lists; can search for, view, enter data and correct any record and generate any report. Cannot create new users or change users' passwords.

- **HR Staff:** Enters and updates records and positions; can generate any report. Cannot create new users or change users' passwords.

- **Training Manager:** sets up the in-service training management program, schedules employees for trainings and evaluates employees' performance in trainings. Cannot create new users or change users' passwords.

4.6 Change Management Procedures

To protect the integrity of one's data and to maintain buy-in from all stakeholders, it is important to follow a change management process to ensure that the impact of proposed changes are documented and the effect on data, processes and reports are fully understood and approved by all stakeholders. Great effort was put to ensure standardization between the HR terminology for MoHSS and AMS, so both stakeholders should approve all changes to the system.

<u>The following steps should be incorporated in the process:</u>

a) Develop a Request for Change (RFC)
b) Initiate the development project – if the change request will have an impact on the software, this process must include functional testing by the developers.
c) User Testing – this process is a collaborative process between the developer(s) and the users with the users required to signoff of changes. Existing functionality should also be reviewed to ensure they were not affected by the change. Implement the change – maintain version control

4.7 Backup and Disaster Recovery Plan

A backup and disaster recovery plan will be drafted for the system by the time the system is live to ensure that AMS is able to recover the data from backups in the event of a disaster. Backups should be regular and stored off site with at least quarterly tests to ensure we are able to retrieve data from backup mediums.

4.8 User Support Procedures

In order to ensure users get the support they require to continue using the system, User Support procedures will be drafted and communicated to all users. Such procedures should allow for all user support requests to be logged and tracked ensuring all user requests is satisfactorily concluded.

4.9 Data Completeness and Accuracy

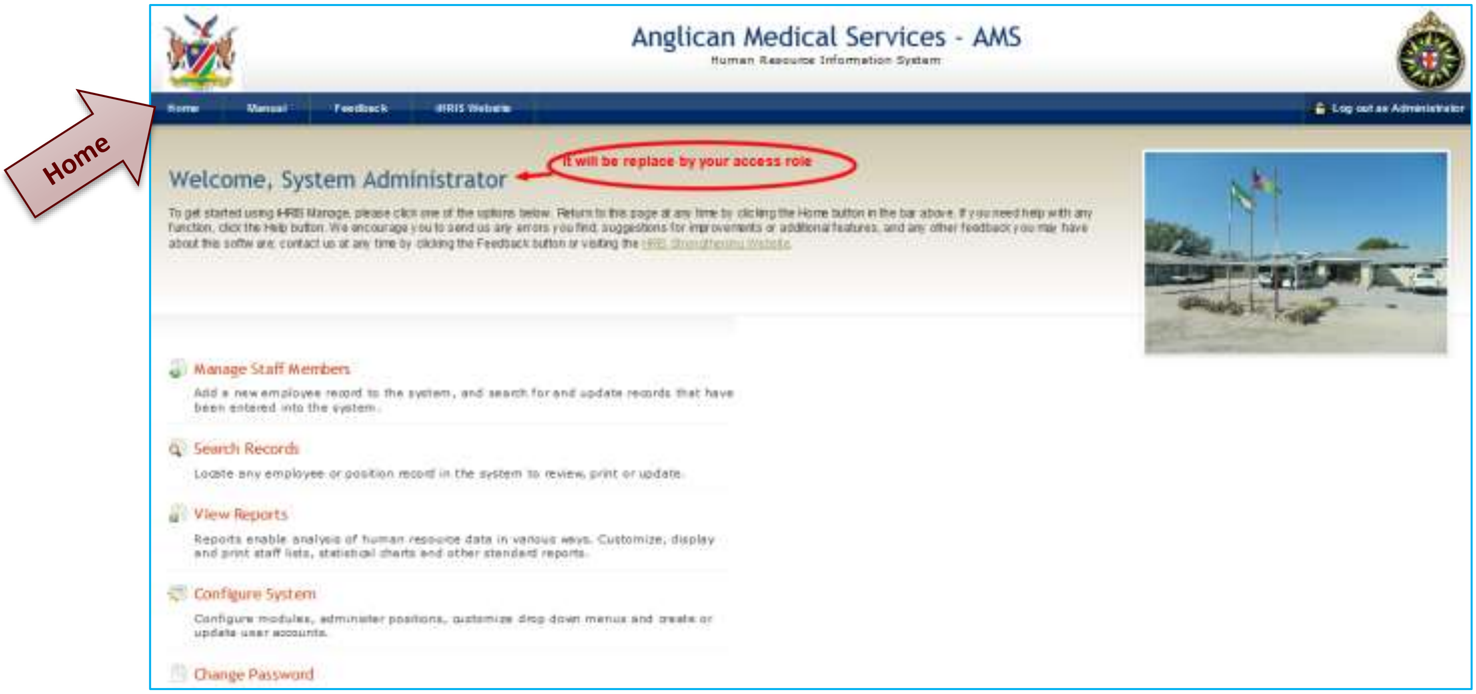
In order to go-live with the system, we have started with employee files of AMS. These might not have all the information of the staff members. AMS have to ensure that employee files are up to date or verify the data through requesting staff members to complete data capturing sheets and/or hand in certified copies of e.g. qualifications and other information that are currently not on the employee file. The completed data capturing sheets can then be used to complete the staff member's information in the system.

Secondly, in order to place reliance on the information we retrieve from the system, we have to ensure that the data is accurate. This process usually entails comparing the information of a staff member in the system to the information that is in the staff member's file and the payroll.

5 GETTING STARTED

5.1 Logging On & Navigation

Enter your username and password and click on Login or press **<Enter>** remember both your username and password is case-sensitive.



5.1.1 Toolbar

The iHRIS Manage toolbar is situated at the top of the screen which is available at all times from anywhere in the system. It has the following menu-options:

- **<Home>:** This option will bring you back to the main screen from anywhere in the system.
- **<Manual>:** This option will help you to perform some specific tasks on the system.
- **<Feedback>:** This option will allow you to submit comments to the iHRIS Manage developer team.
- **< iHRIS Manage Website>:** This option will open a new browser window with the Global iHRIS Manage Strengthening home page.

5.1.2 Menu-options

The following menu options are available in iHRIS Manage, and will be referred to in this manual as first-level menu options.

- **<Manage Staff Members>**This menu-option will take you to the screen where you can add a new staff member
- **<Search Records>** this menu-option will allow you to search for a person or a position. This is from where you will do enquiries as well
- **<View Reports>**This menu-option will take you to the reporting section
- **<Configure System>** This menu-option will take you to the section from where you can customize drop-down menus also called creating and maintaining the master data. You will need to have the appropriate privileges to see this menu option. Master data is the information in the system that changes infrequently and is used in building up drop-down lists where users can select a value instead of having to enter it.
- **<Change Password>** Passwords are case-sensitive in iHRIS Manage. You should change your default password to ensure that no-one uses your logon details to access the system unauthorized.

If you've selected a Configure System on menu option, the options available under that Configure System will be displayed on the left-hand side of the screen as illustrated in the figure below. *Note: Not all users will have access to this function.*

Sub-menu functions available under the first-level menu option

6. ADMINISTER DATABASE

To ensure that standard data types such as countries, regions, districts, marital status, reasons for position changes, facility and department names, and the like are enforced across the system, those standard data types must be created as lists. These lists are used to create selection menus that provide options for selection when adding records, jobs and positions.

Click **Configure System** and then click **Administer Database** to create and update standard lists of data for selection in system menus. Only the HR Manager and System Administrator can create data types.

Administer database is composed of several sections i.e. Geographic Information, Organization Lists, Employee Lists, Create Job Structure, Manage Positions,

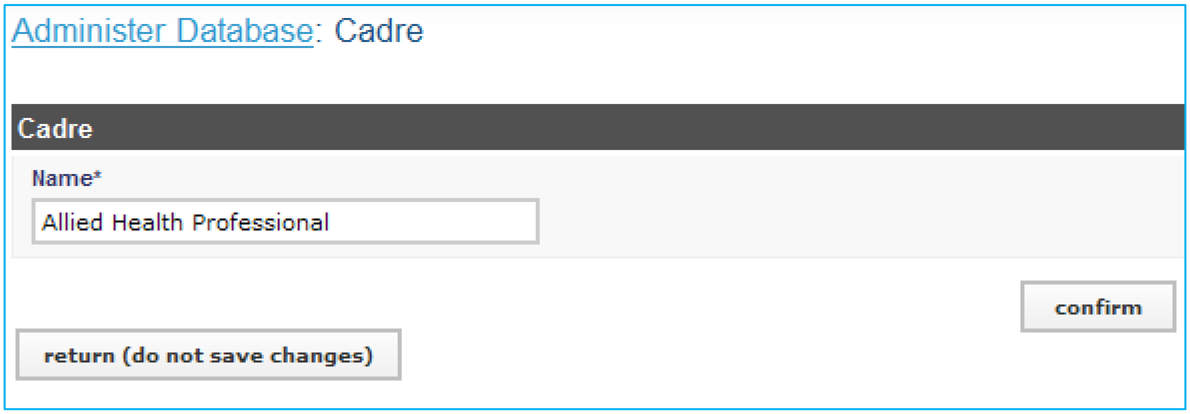
5.2 Create Job Structure

5.2.1 Cadres

A cadre is a broad category of health workers characterized by the specific training, certification or other qualifications required to practice or be licensed in that field. Examples of cadres include Nurse, Physician and Pharmacist. Each job can be linked to one cadre for reporting purposes. You may add new cadres or edit any cadre that was previously added.

Under the "Create Job Structure" section, select Cadres.

The Cadre page opens, showing all cadres entered in the database. Either click on **Add New Cadre** or select existing cadre and then click Update This Information to edit it.



The Cadre form opens. Enter the Name of the cadre. Click Confirm and confirm that the name entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it.

5.2.2 Job Classifications

This provides a way to groups jobs for reporting purposes e.g. possible job classifications could be Management, Senior Management, Executive Management to allow for reports to be generated giving the number of job per job classification. This classification could possibly be used for affirmative action (previously disadvantage people).

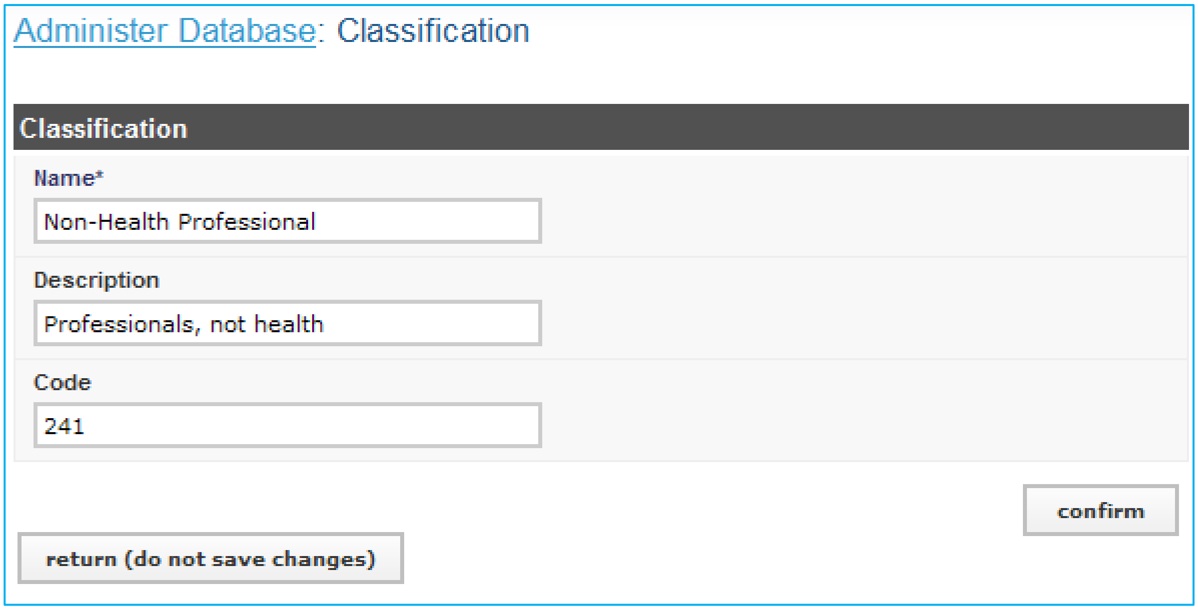
Under the "Create Job Structure" section, select Job Classifications.

The Job Classification page opens, showing all job classifications entered in the database. Either click on **Add New Job Classification** or select an existing job classification and then click Update This Information to edit it.

Enter the **Name** of the job classification.

Enter a brief **Description** of the job classification (optional).

Enter a **Code** for the job classification (optional).



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

5.2.3 Salary Grades

This is where all the salary grades are defined, notches and minimum and maximum amounts per notch are set up.

Under the "Create Job Structure" section, select Salary Grades

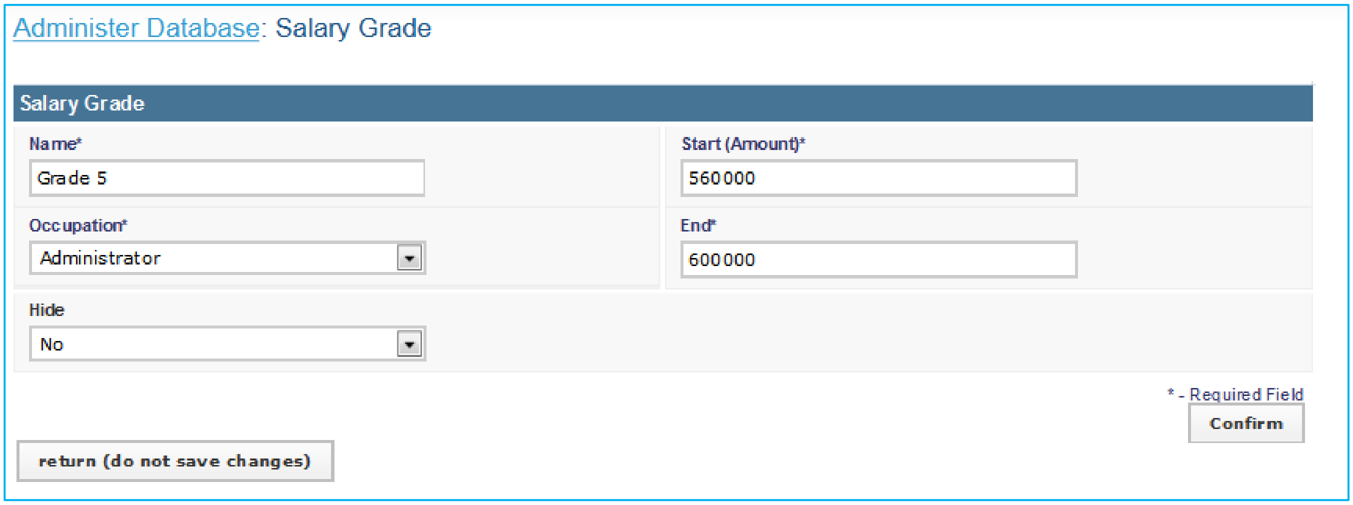
The Salary Grades page opens, showing all salary grades entered in the database. Either clicks Add New Salary Grade or selects an existing salary grade and then click Update This Information to edit it.

Enter the **Name,** or identifier, of the salary grade.

Select **occupation**

Select a Currency for the starting salary and enter the amount of the Start salary (the lowest salary in the band).

Select a Currency for the ending salary and enter the amount of the End salary (the highest salary in the band).

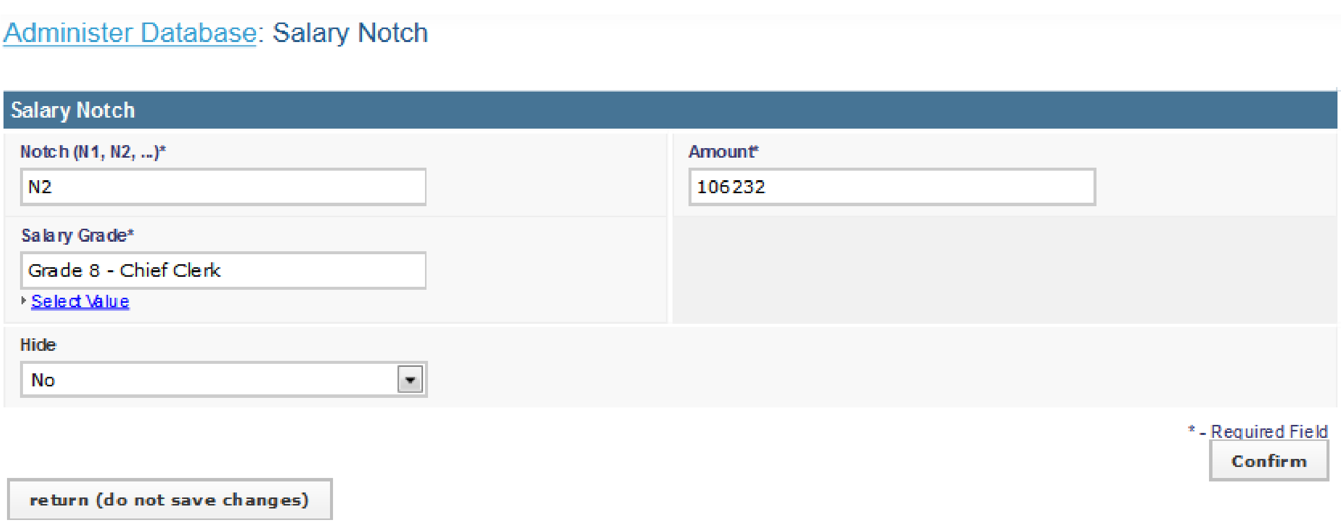


Click Confirm and confirm that the name entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it.

5.2.4 Salary Notches

Under the "Create Job Structure" section, select Salary Notch.

The Salary Notches page opens, showing all Salary Notches entered in the database. Either clicks Add New Salary notch or selects an existing Salary Notches and then click Update This Information to edit it. Enter the **Name** of the Salary notch. Select **occupation** and enter the amount of salary.



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

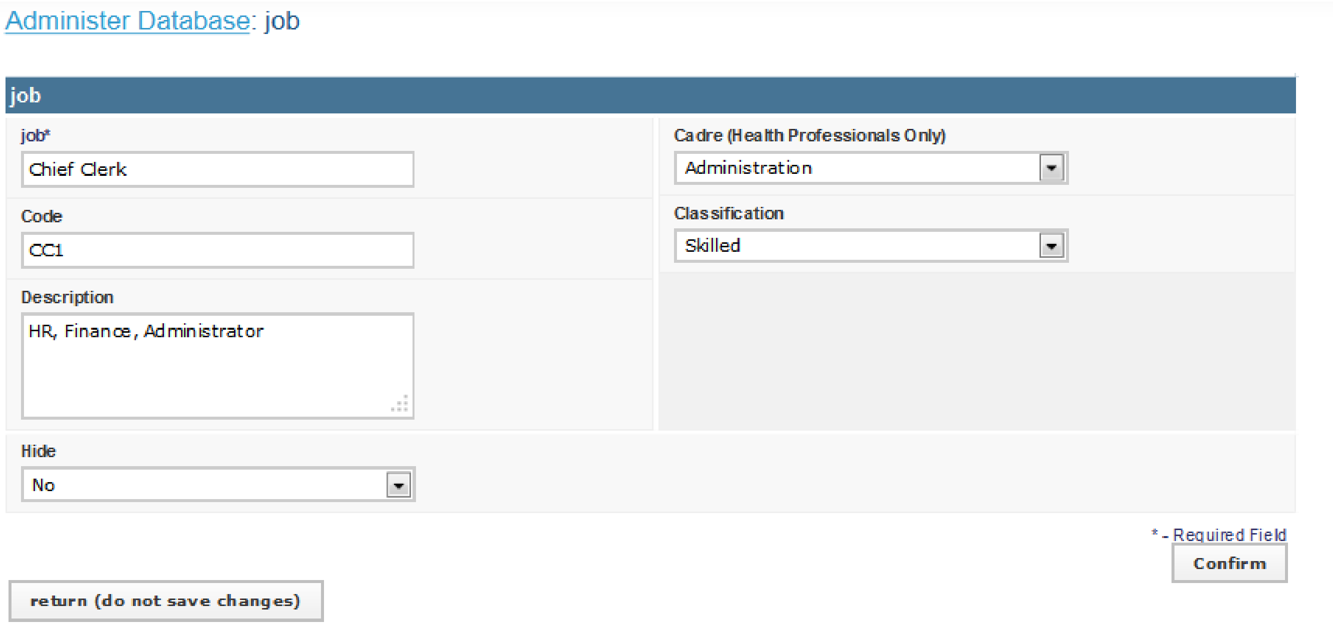
5.2.5 Job

A *job* is a general set of qualifications, duties and responsibilities as specified in a job description. Each job may be linked to a cadre, job classification and salary grade.

There may be multiple instances of the same job within an organization. Each of these instances is filled by one employee and is referred to as a *position*. Before a position can be created in the system, its generic job must be added. **NB: Only the HR Manager or System Administrator can add or edit jobs**

The Job form opens.

Enter a **Title** for the job.
Enter a **Code** for the job (optional).
Enter a **Description** for the job (optional).
Select the **Salary Grade** for the job (optional).
Select the **Cadre** for the job (optional). Only select a cadre for health professional jobs.
Select the **Classification** for the job (optional).



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

5.3 Manage Positions

5.3.1 Salary Sources

You define all possible salary sources here e.g. USAID, GRN, etc. Benefits can be linked to a salary source as well, so one can ultimately retrieve information on which salaries and benefits are e.g. paid by donors'.

The Salary Source form opens. Enter the Name of the salary source. Click Confirm and confirm that the name entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it.

5.3.2 Positions (by Facility)

Each job will have at least one position. Position refers to the number of people that can be appointed per job e.g. for the job medical superintendent.

The Position form opens.

Select the **Job** for the new position.

Enter the **Position Title** (this may be the same as the job title).

Enter a Position **Description** as an addendum to the job description (optional).

If there are one or more **salary sources** to track for the position, select them in the Source box; to select more than one salary source, hold down the CTRL key while clicking the name of each salary source

Enter any comments or notes about the position in the **Position Comments** box (optional).

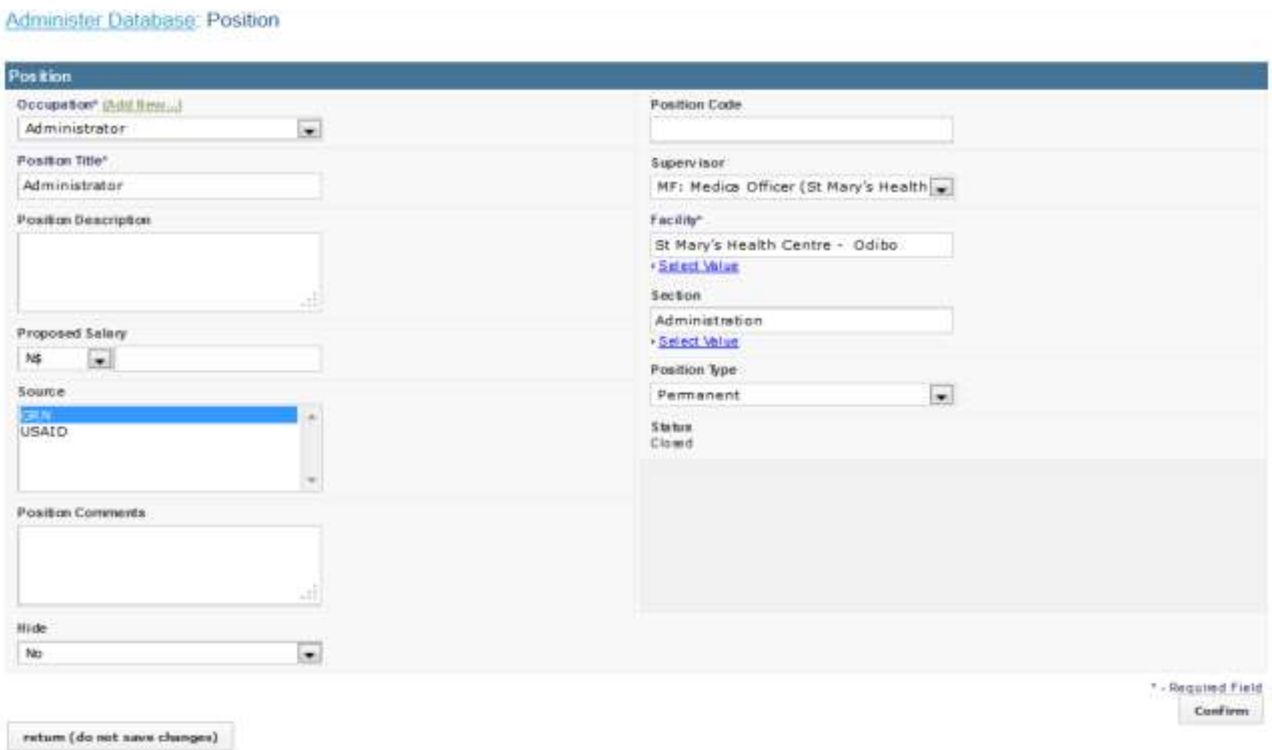
Enter the **Position Code.**

Either type or select the code and title of the position that will supervise this position under **Supervisor** (optional).

Select the **office or facility** where the position is located in the Facility menu.

Select the **Section and Department** where the position is located (optional).

Select the Position Type (optional).



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

5.3.3 <u>Positions (by Status)</u>

Select Positions (by Status) to add or edit a position based on its status as open, closed or discontinued.

5.3.4 Terms of Appointment

MOHSS use 12 months term of appointment, but AMS is set to use 12 months and 6 months appointment.

The Term of Appointment form opens. Enter the Name of the position type. Click Confirm and confirm that the name entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it.

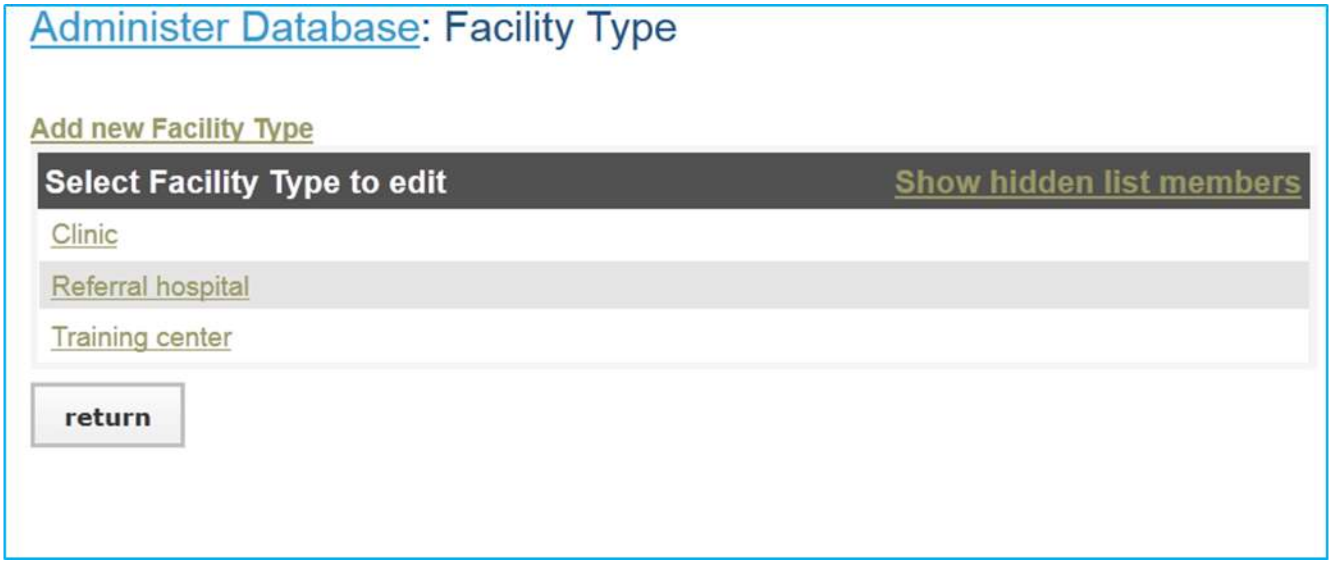
5.4 Organization Lists

5.4.1 Facility Type

The facility type classifies each office and facility in the organization for reporting and organizational purposes. For MOHSS, these refer to the facilities as per Position List approved by the Organizational Structure. For AMS, these refer to all the AMS facilities Examples of facility types include Office, Hospital and Clinic. Specify at least one facility type.

- Click **Configure System then click Administer Database.**
  Click on Facility Type.

- The Facility Type. Page opens, showing all types entered in the database.



Either Click Add New Facility Type or select an existing Facility Type and click Update This Information to edit it.

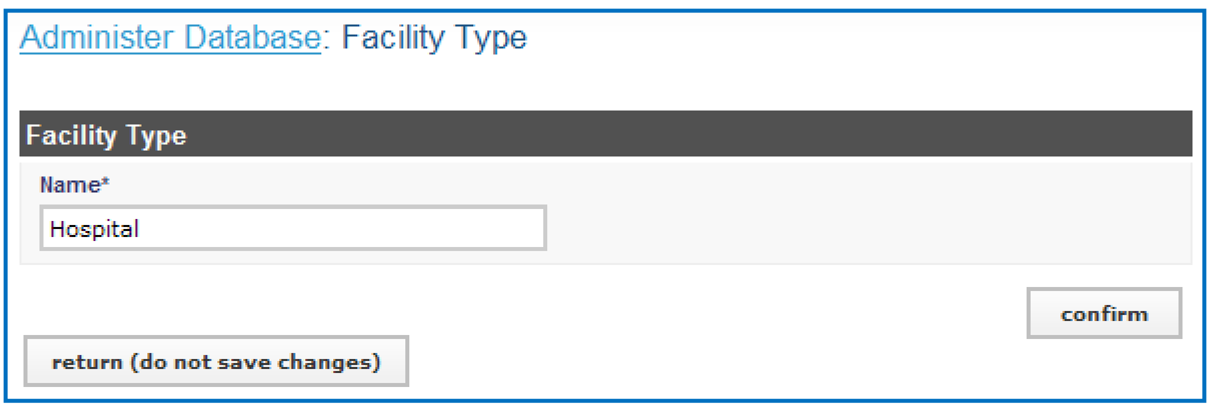


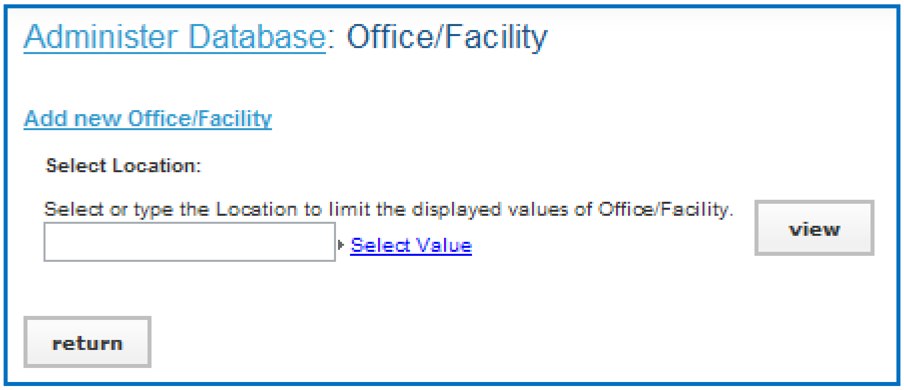
Figure 1: Update Facility Type

The Facility Type form opens. Enter the **Name** of the facility type. Click Confirm to confirm that the name entered is correct.

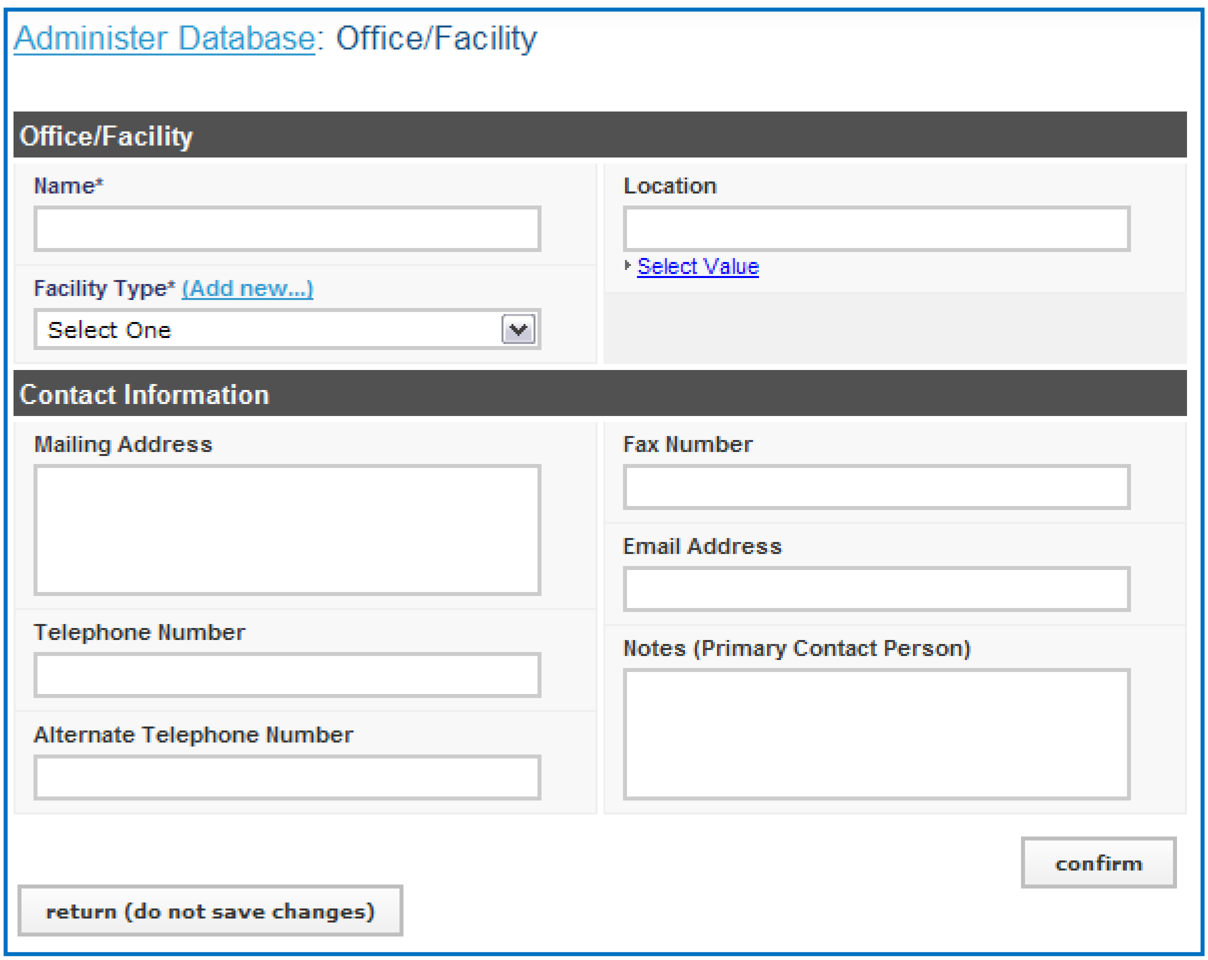
5.4.2 Office/Facility

Facility is specific division within an organization that is defined by having its own budget and often has a unique facility code. Often a facility is responsible for providing health care services.

Click on **Facility** then Facility page opens. Click on View to view all Facilities entered in the database.

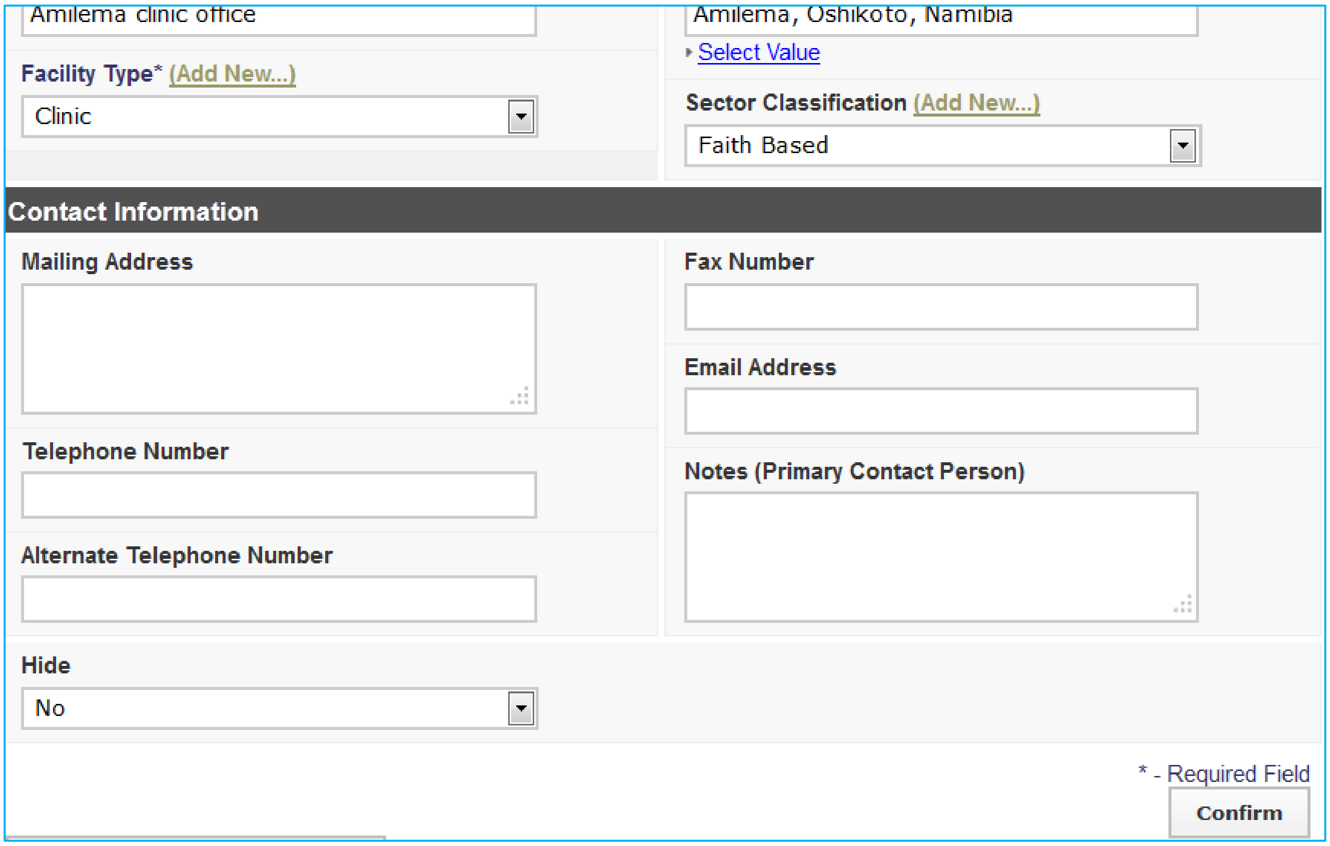


Either Click Add New Facility or select an existing Facility and click **Update This Information** to edit it.



Select a **Facility Type** for the office or facility.

Enter the **Contact Information** for the office or facility (optional).Under **Location**, either type the name of the district where the office or facility is located, or click <u>Select Value</u> and select the Country, Region and District where the office or facility is located.



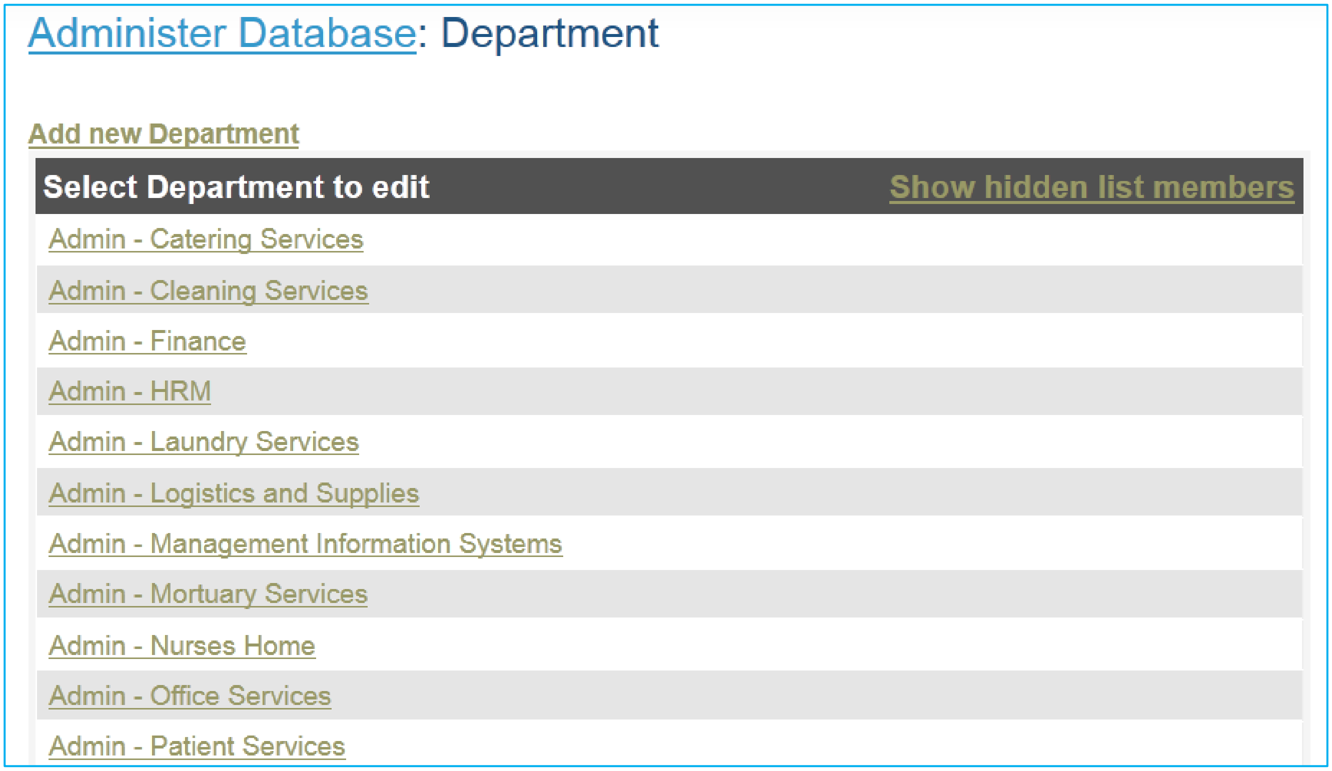
Click Confirm and confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it.

5.4.3 <u>Department and Section</u>

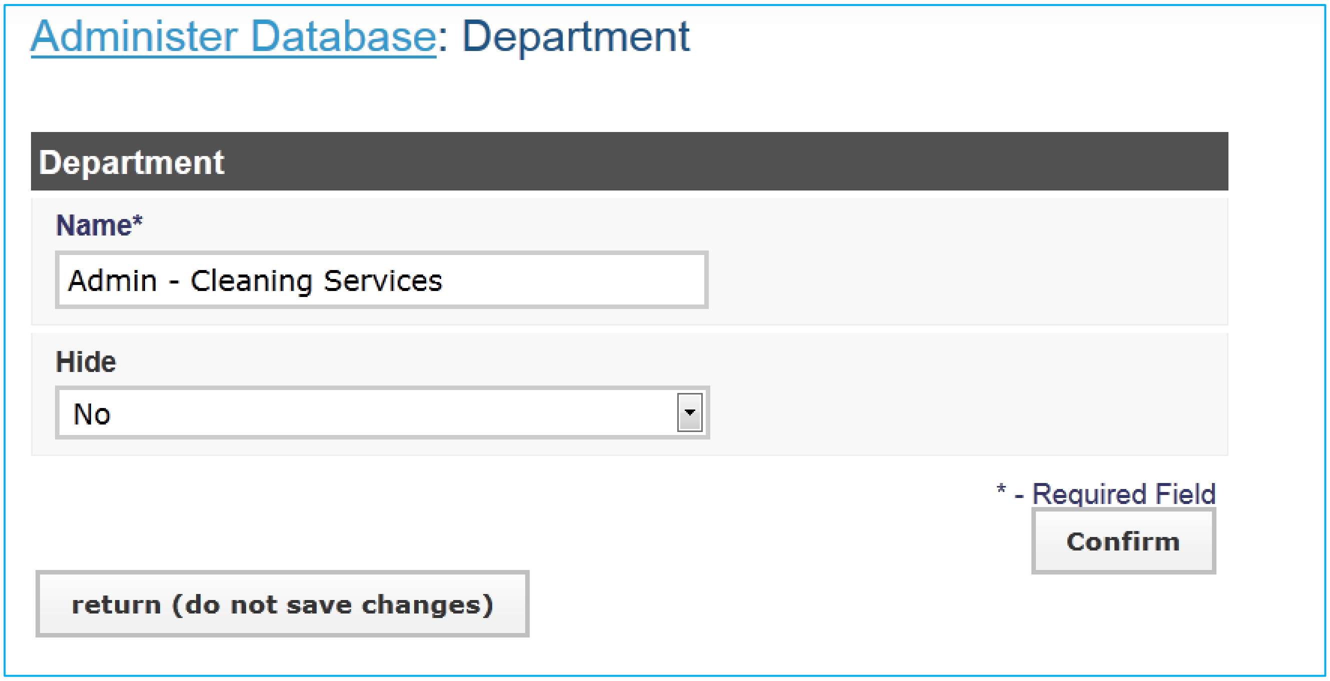
A Department and section as per organizational structure have been provided in the system e.g. The Department Administrative Support Services with the subsection cleaning services.

Click **Configure System then click Administer Database.**

Click on Department



The Department page opens, showing all departments entered in the database. Either Click **Add New Department** or select an existing Department and click **Update This Information** to edit it



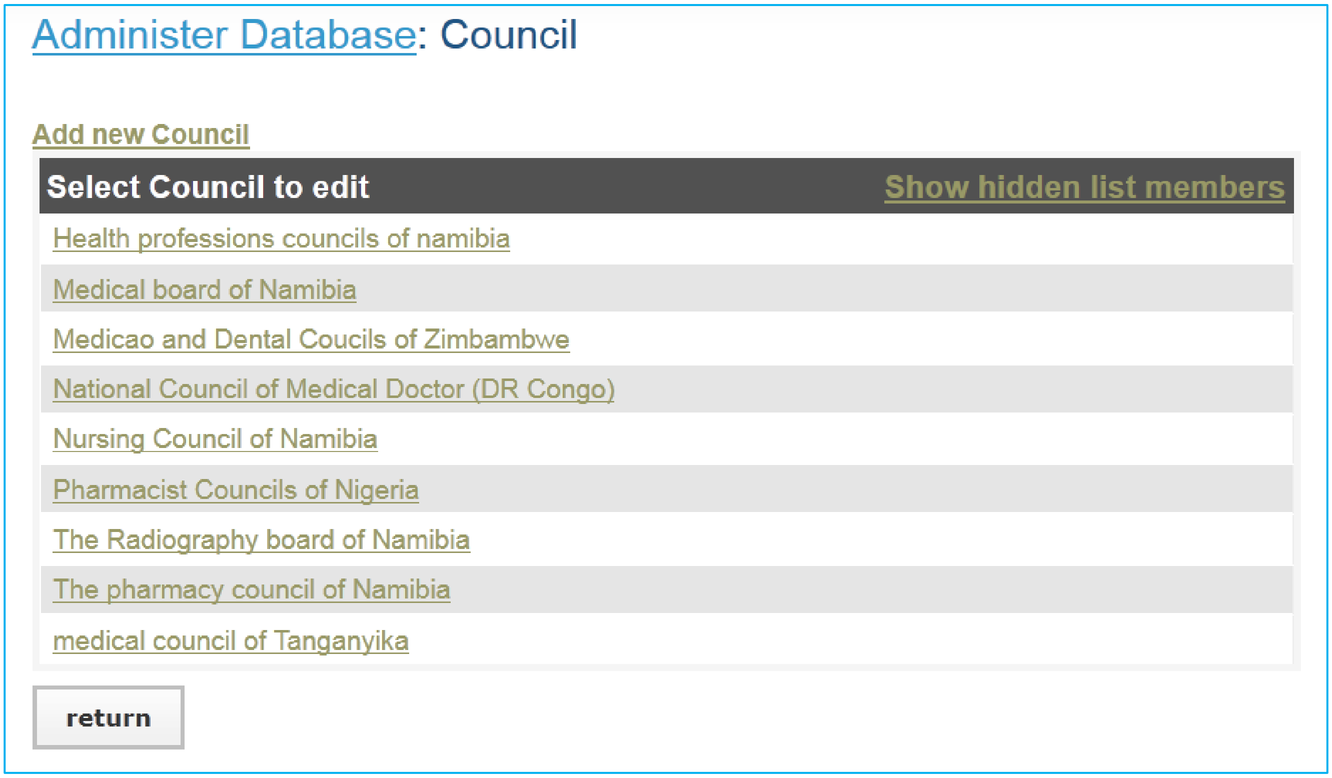
Enter the **Name** of the department. Click Confirm and confirm that the name entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it.

5.4.4 Registration Councils

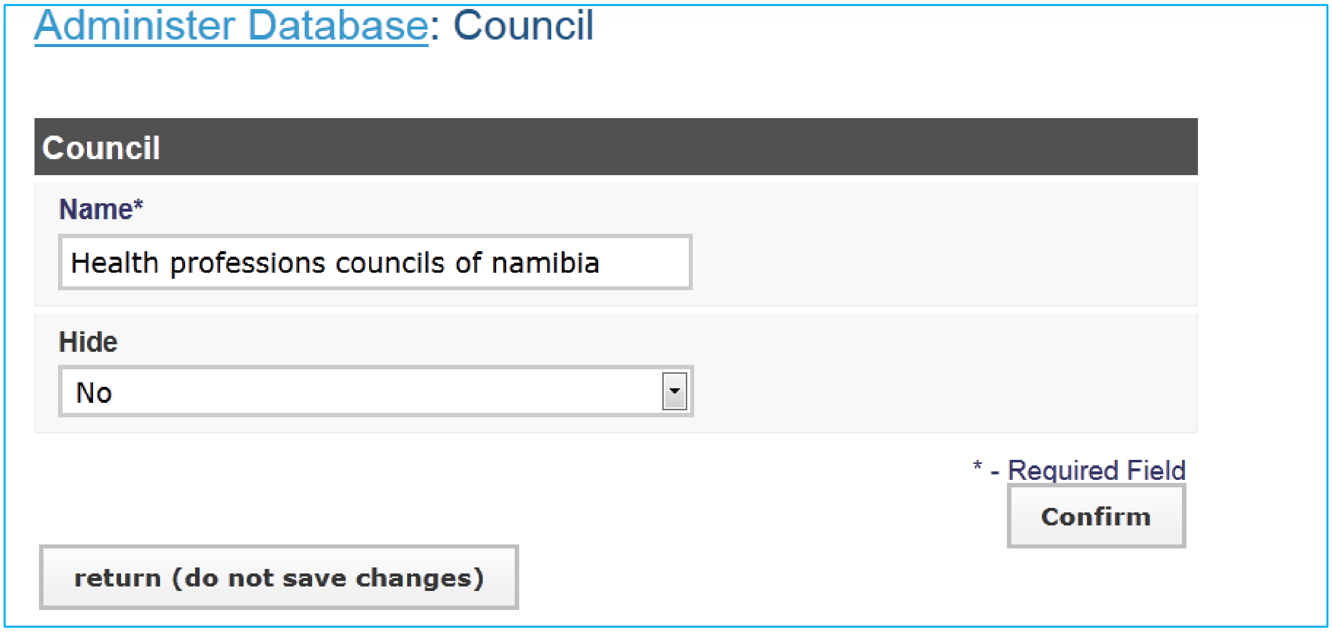
A registration council is the professional association or licensing board that registers health professionals, such as nurses or midwives. If you need to track these registrations or licenses for your employees, enter the name of at least one registration council for selection.

Click **Configure System** then click **Administer Database.**

Click on Registration Council

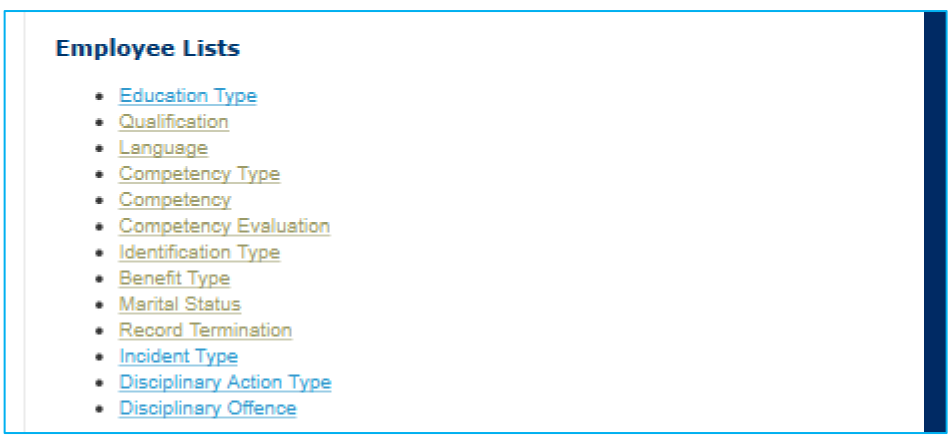


The Registration Council page opens, showing all Registration Councils entered in the database. Either Click Add New Registration Council or select an existing Registration Council and click **Update This Information** to edit it.



Enter the **Name** of the Registration Council. Click Confirm and confirm that the name entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it.

5.5 Employee Lists

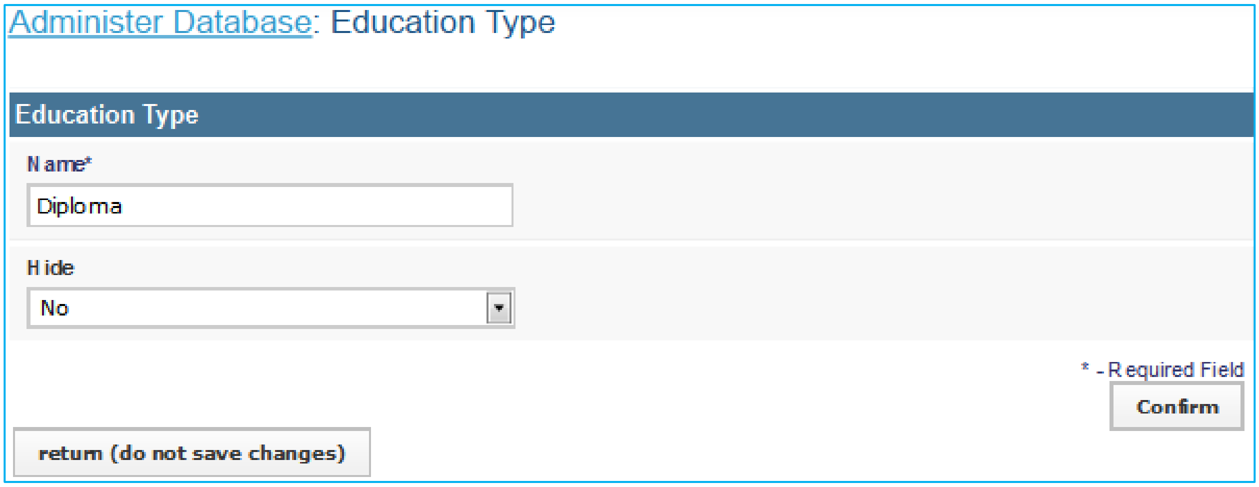


5.5.1 Education Type

These are setup to refer to the different types of qualification namely degree, diploma, certificate, etc.

Click **Configure System** then click **Administer Database**

Click on **Education Type/Level**



The Education Type/Level page opens, showing all Education Types/Levels entered in the database. Either Click **Add Education Type/Level** or select an Education Type/Level and click **Update This Information** to edit it.

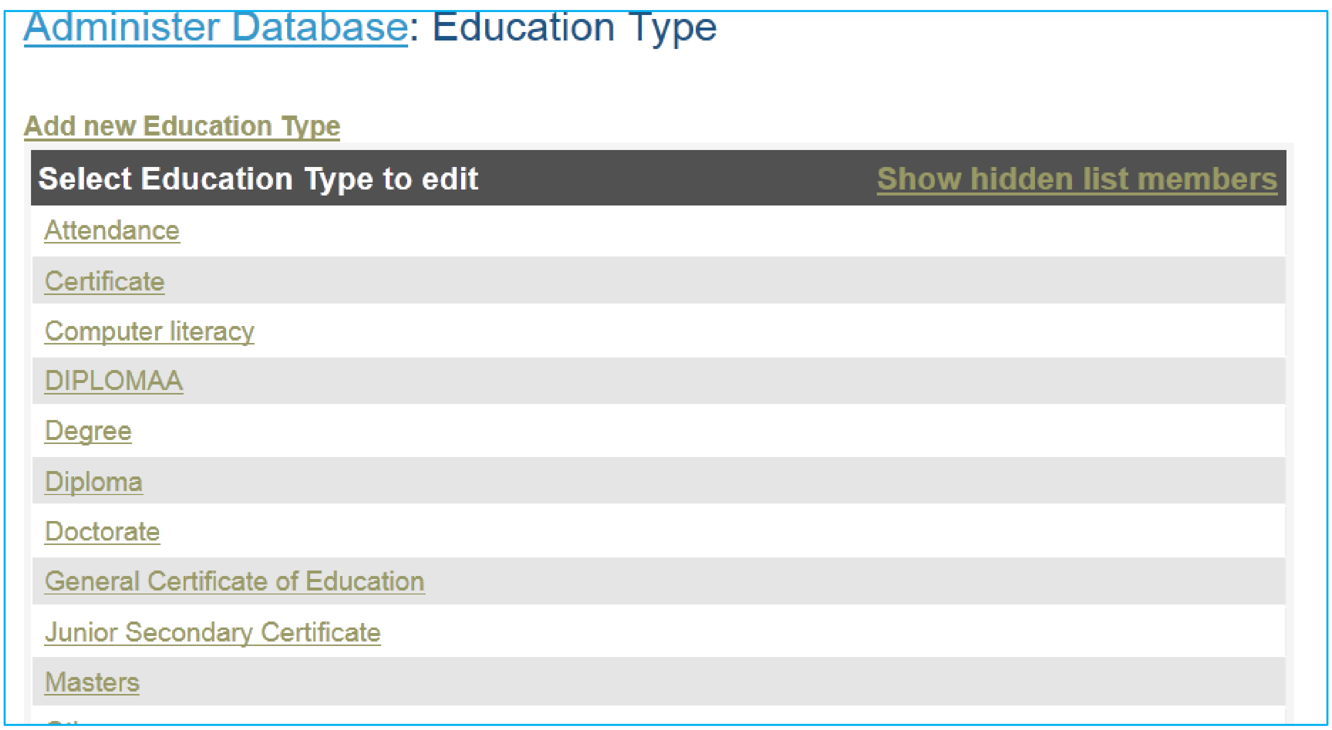
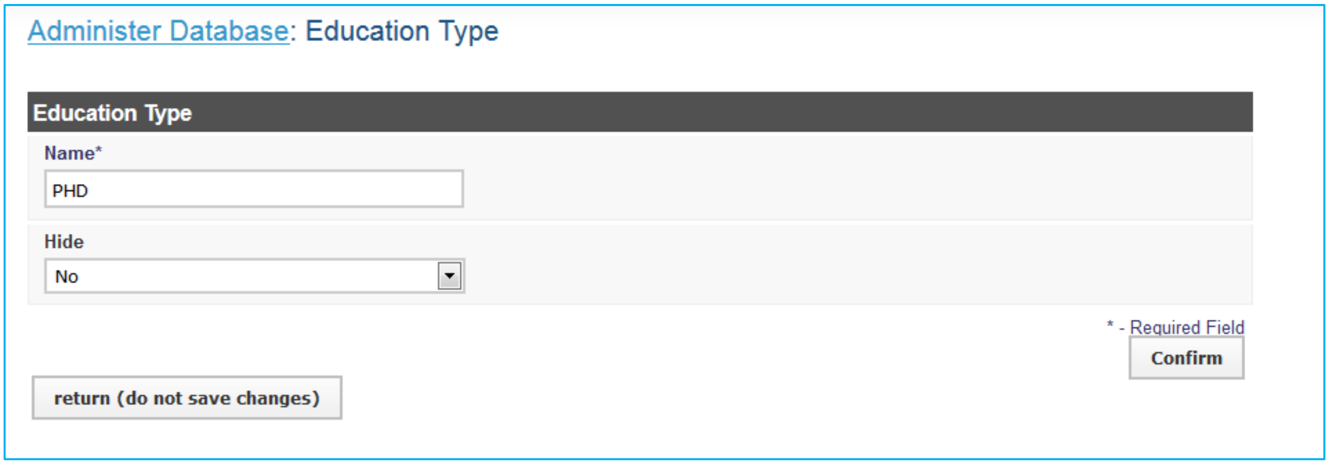


Figure 2: view add new Education type

Add new education type Click **confirm** and click **save**



5.5.2 Qualification

These are setup to refer to the different qualifications and is linked to Education type so before you can add a qualification, there must be an Education type to link the qualification to e.g. for education type = Degree, you can add Bachelor of Science, Bachelor of Commerce, etc.

Click **Configure System** then click **Administer Database**

Click on **Qualification**

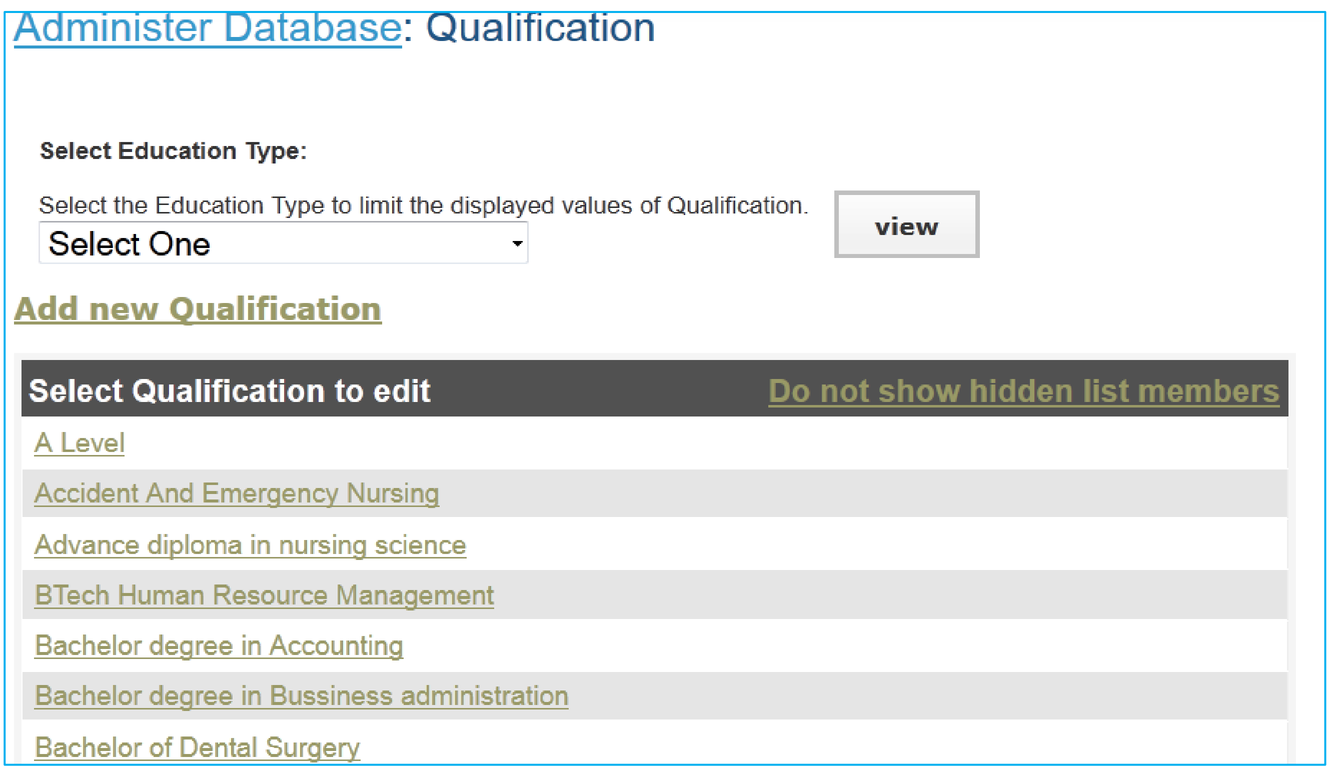
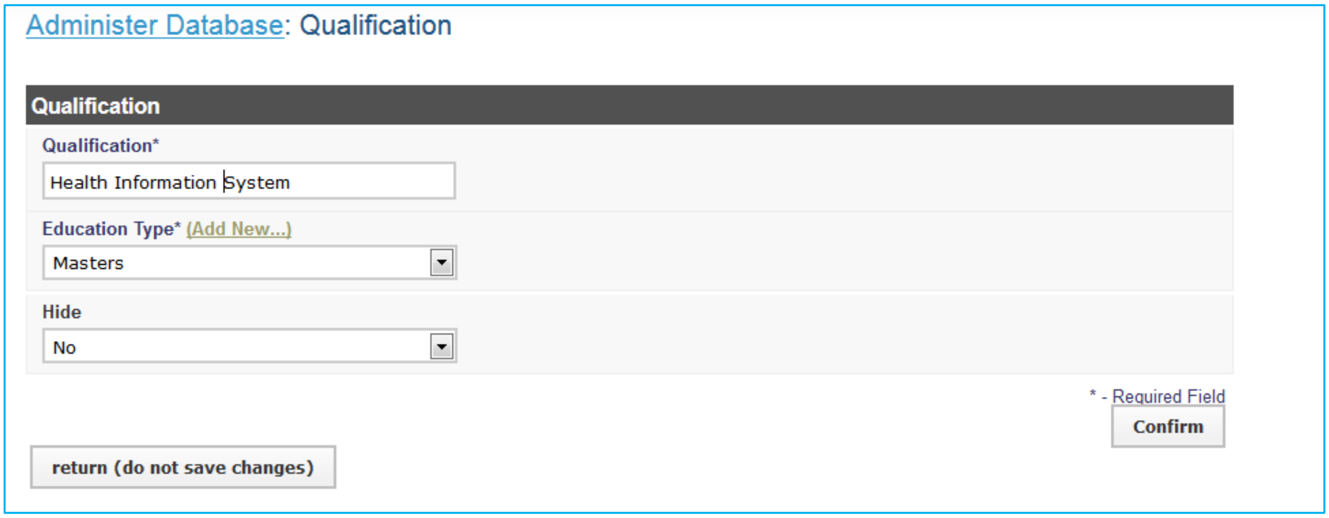


Figure 3: view and add new qualification

The qualification page opens, click view to show all qualifications entered in the database. Either Click **Add New Qualification** or select a qualification and click **Update This Information** to edit it.



Click **confirm** and click **save**

5.5.3 <u>Language</u>

These are employee's native languages.

Click **Configure System** then click **Administer Database**

Click on **Language**

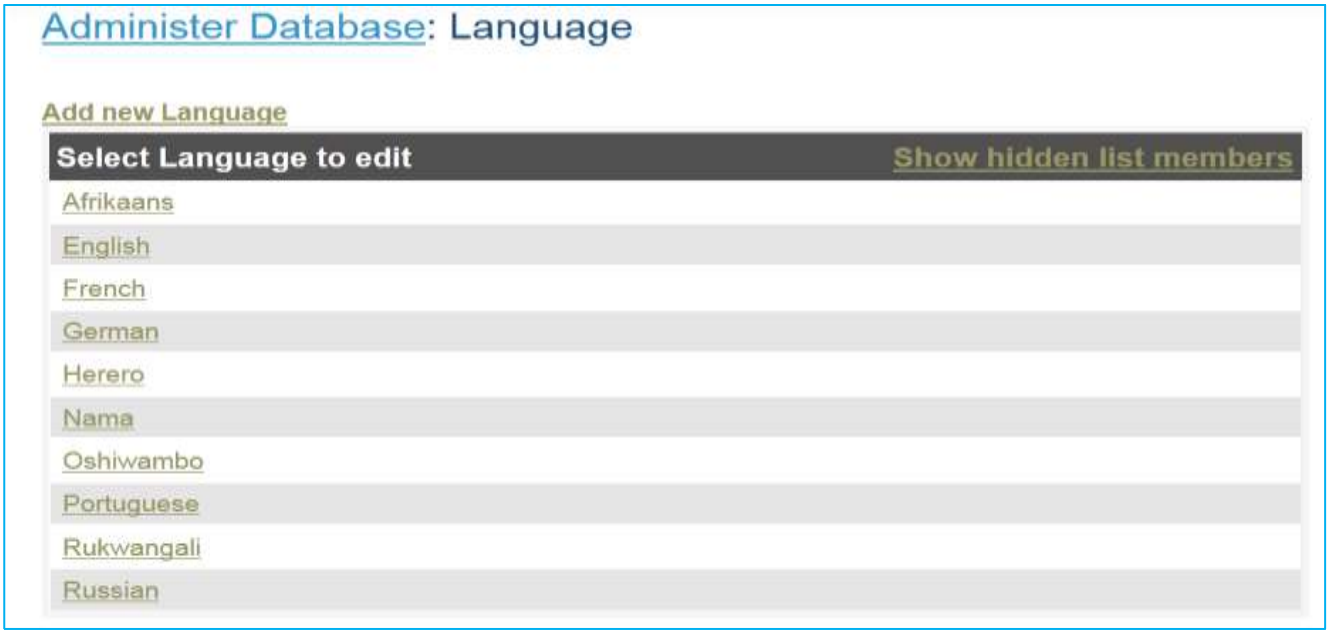


Figure 4: view and add new language

The Language page opens, showing all Languages entered in the database. Either Click **Language** or select a **Language** and click **Update This Information** to edit it.

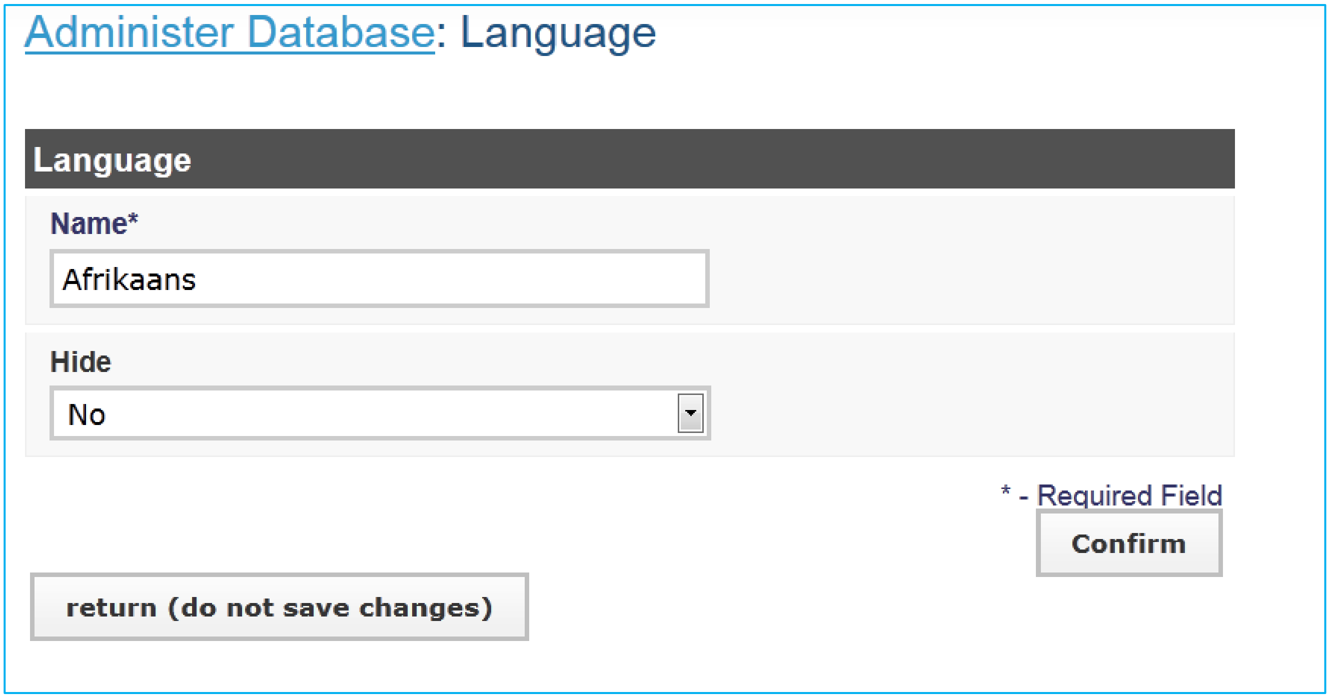


Figure 5: Update Language

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

5.5.4 <u>Competency Type</u>

A competency type is a broad category for organizing competencies, or skills in which employees have been assessed as competent. Examples of competency types include Driving License, Computer Skills, Competency types combined with competencies comprise your organization's competency mode.

Click **Configure System** then click **Administer Database**

Click on **Competency Type**

The **Competency Type** page opens, showing all Competency Types entered in the database.

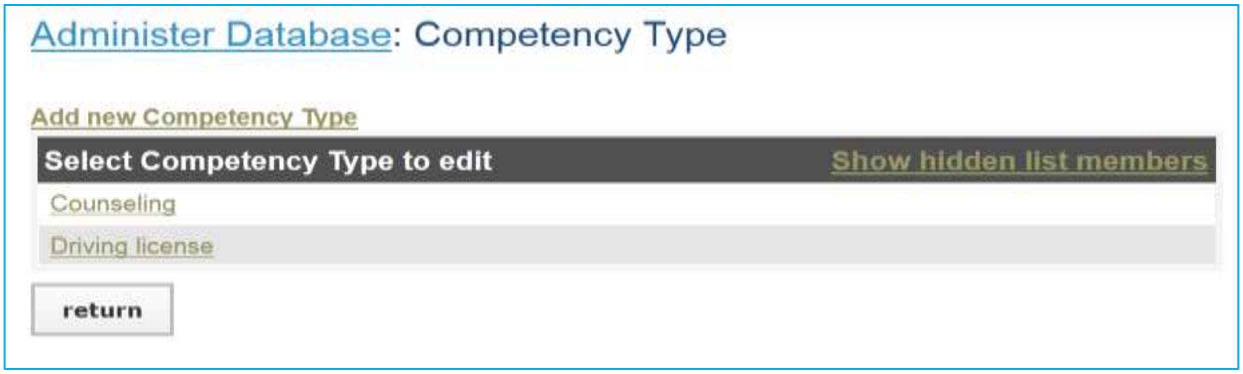


Figure 6: View and Add new competency type

Either Click **Add Competency Type** or select a Competency Type and click **Update This Information** to edit it.

Figure 7: Update competency type

Enter the **Name** of the competency type. Click Confirm and confirm that the name entered is correct. If it is not correct, click Edit to

5.5.5 <u>Competency</u>

A skill performed to a specific standard under specific conditions. When an employee has been assessed as having a particular competency, that competency can be added to the employee's record. Competencies may also be earned by completing training courses.

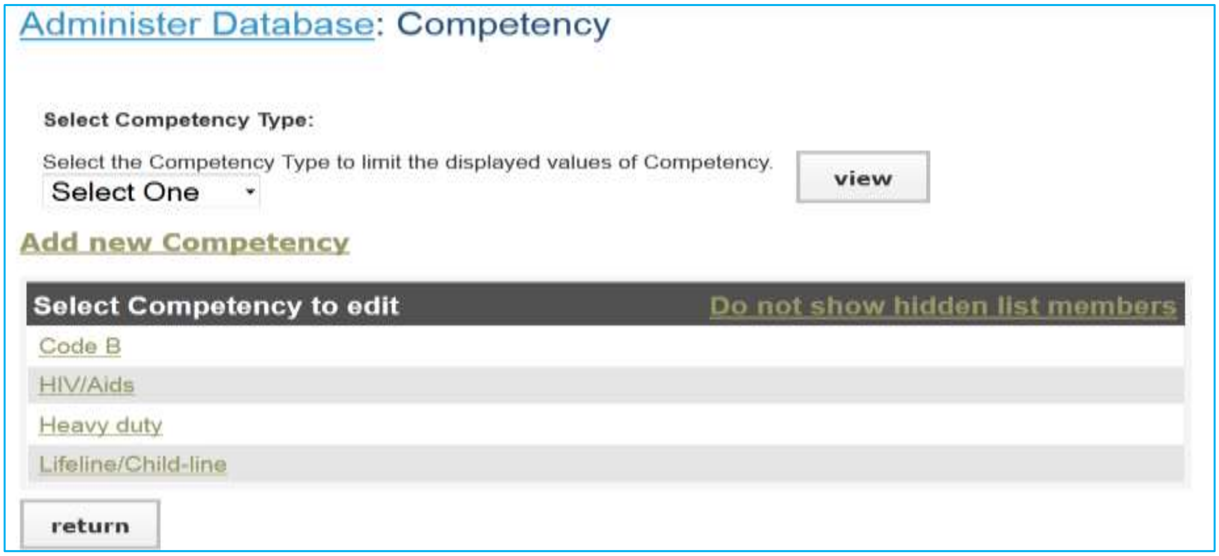


Figure 8: View and Add new competency

Either Click **Add Competency** or select a Competency **Update This Information** to edit it.

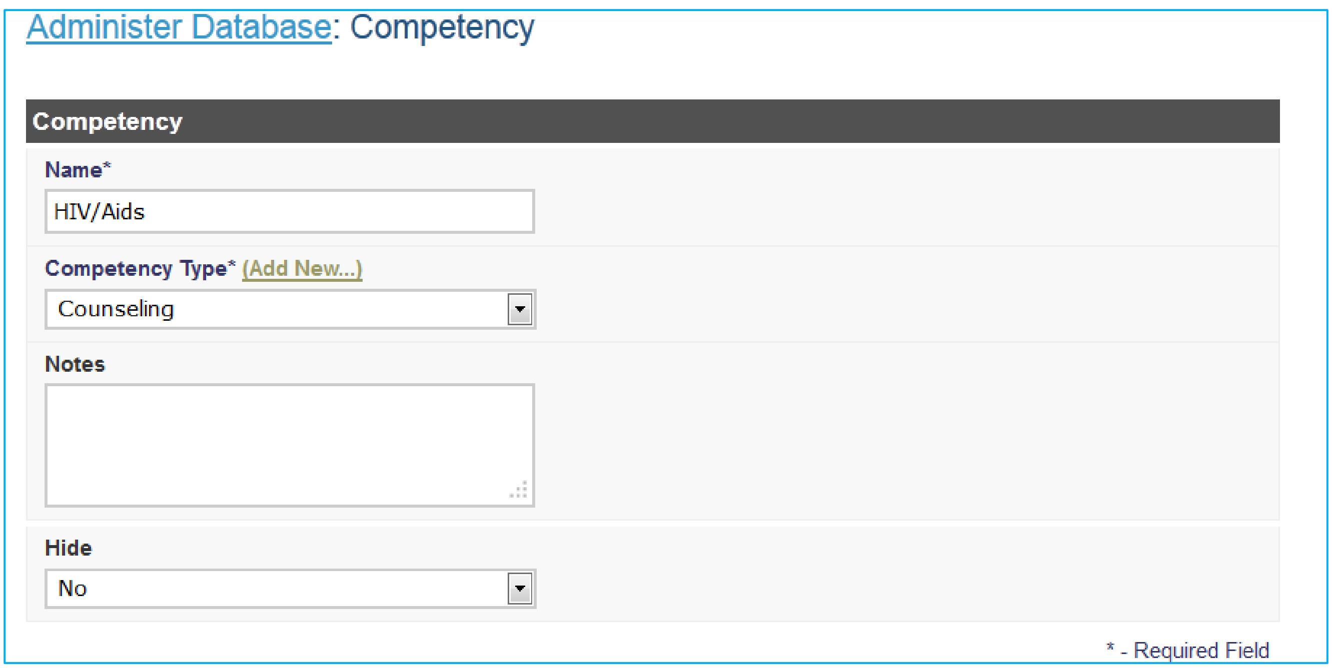


Figure 9: Update competency

Enter a **Name** for the competency.

Select the **Competency Type** for the competency.

Enter any **Notes** about the competency (optional).

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

5.5.6 Competency Evaluation

To assess an employee in a particular competency, each evaluation option must be added for selection when making the assessment. For example, you might enter "Competent," "Not Competent" and "Not Assessed" as options to select for the evaluation.

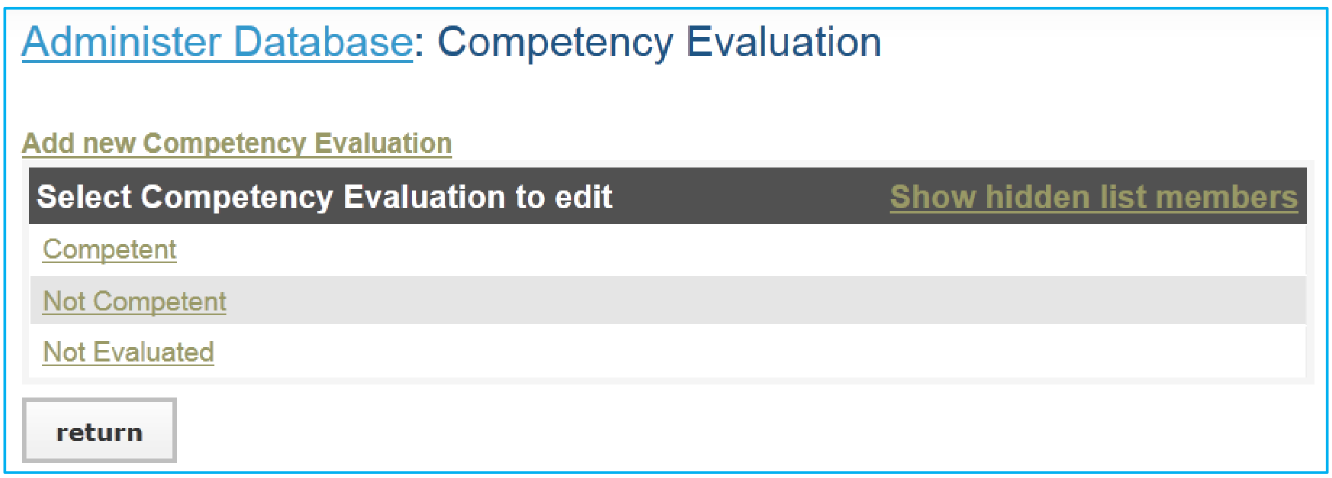


Figure 10 : View and Add new competency evaluation

The Competency Evaluation page opens, showing all Competency Evaluations entered in the database. Either click on **Add** Competency Evaluation or select a Competency Evaluation and click **Update This Information** to edit it.

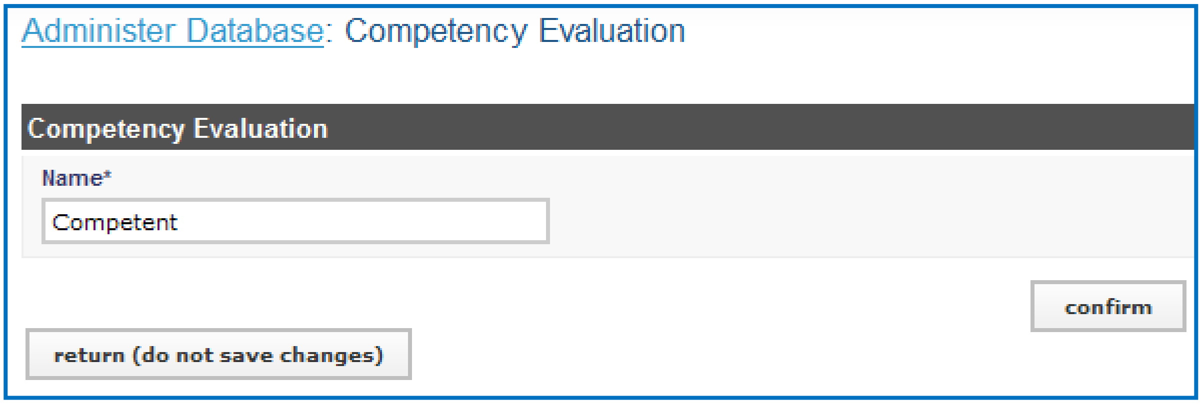


Figure 11: Update competency evaluation

Enter the **Name** of the competency evaluation. Click Confirm and confirm that the name entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it.

5.5.7 <u>Identification Type</u>

Identification types are the means used to identify a person and is the employee code and the passport number. Before you can add the passport number and/or employee code of a staff member, the identification type must be created.

Click **Configure System** then click **Administer Database**

Click on Identification Type

The Identification Type page opens, showing all Identification Types entered in the database.

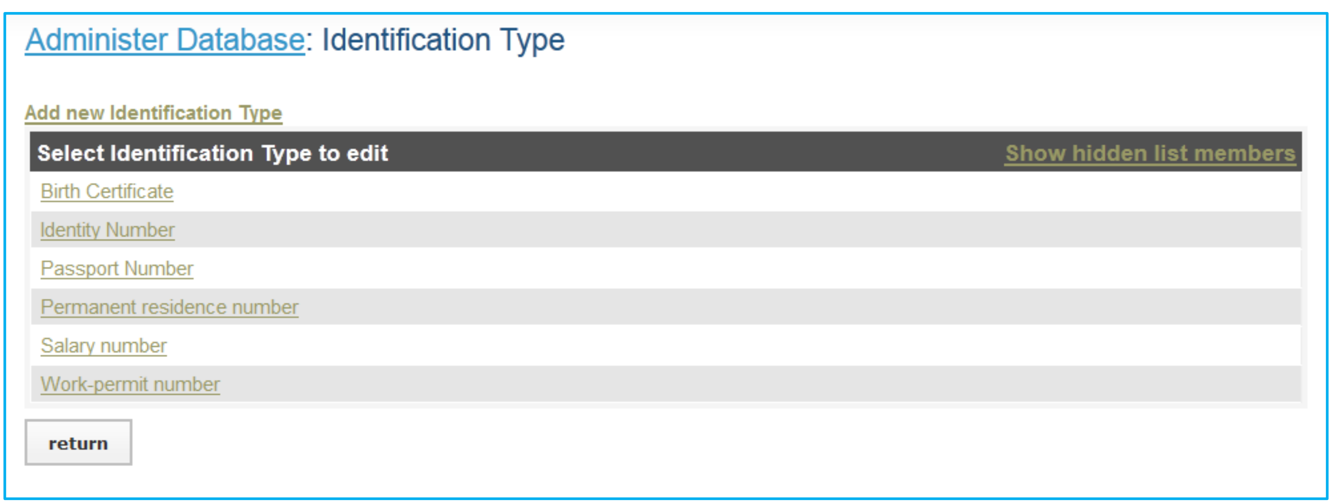


Figure 12: View and Add new Identification type

Either Click **Add** Identification Type or select an Identification Type and click **Update This Information** to edit it.

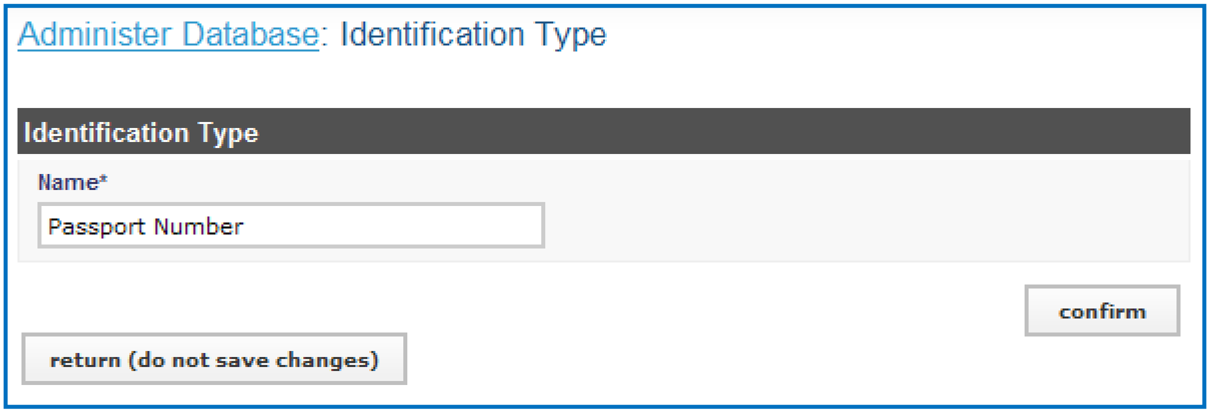


Figure 13: Update Identification type

Enter the **Name** of the identification type. Click Confirm and confirm that the name entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it.

5.5.8 Benefit Type

A type of payment made to an employee that is separate from the employee's salary; the payment may be one-time or recurring.

Click **Configure System** then click **Administer Database**

Click on Benefit/Allowance Type

The Benefit/Allowance Type page opens, showing all Benefit/Allowance Types entered in the database.

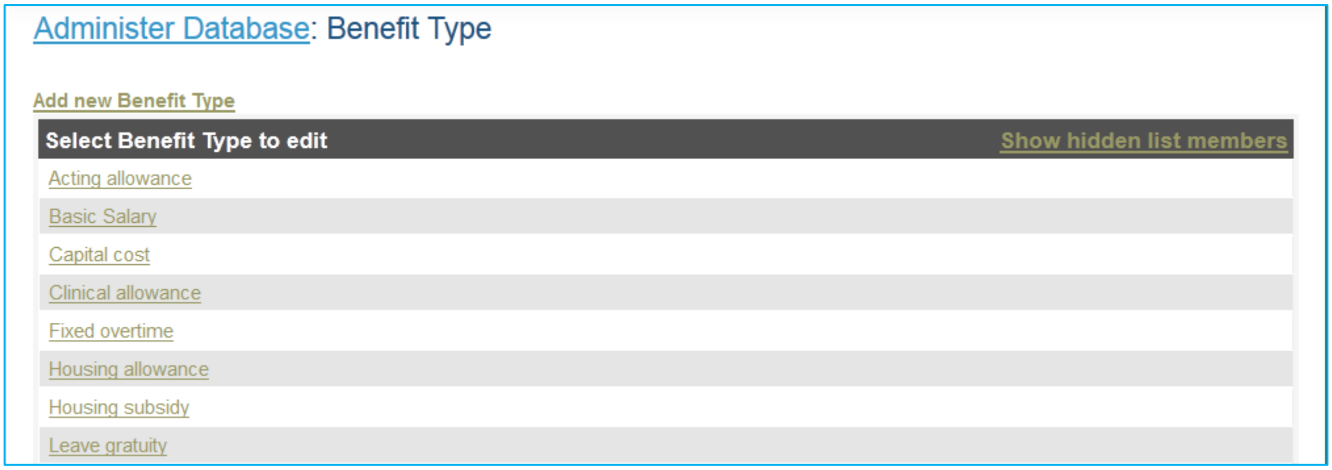


Figure 14 : View and Add new Benefit type

Either Click **Add** Benefit/Allowance Type or select a Benefit/Allowance Type and click **Update This Information** to edit it.

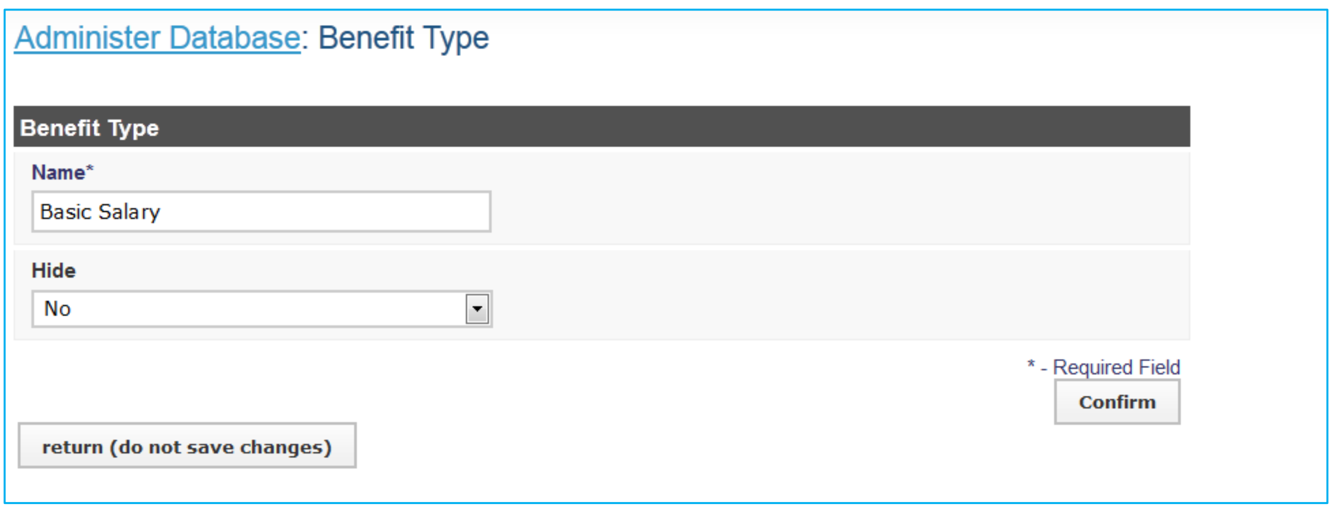


Figure 15: Update Benefit type

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

5.5.9 Marital Status

Marital status can take the following values: Single, Married, Divorced and Widowed

Click **Configure System** then click **Administer Database**

Click on Marital Status

The Marital Status page opens, showing all Marital Status entered in the database.

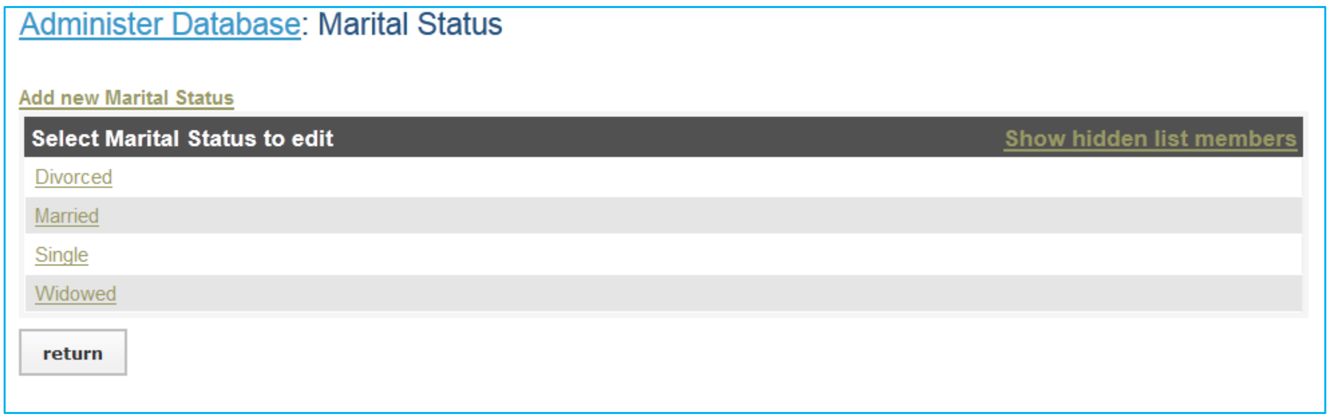


Figure 16: View and Add new marital status

Either Click **Add** Marital Status or select a Marital Status and click **Update This Information** to edit it.

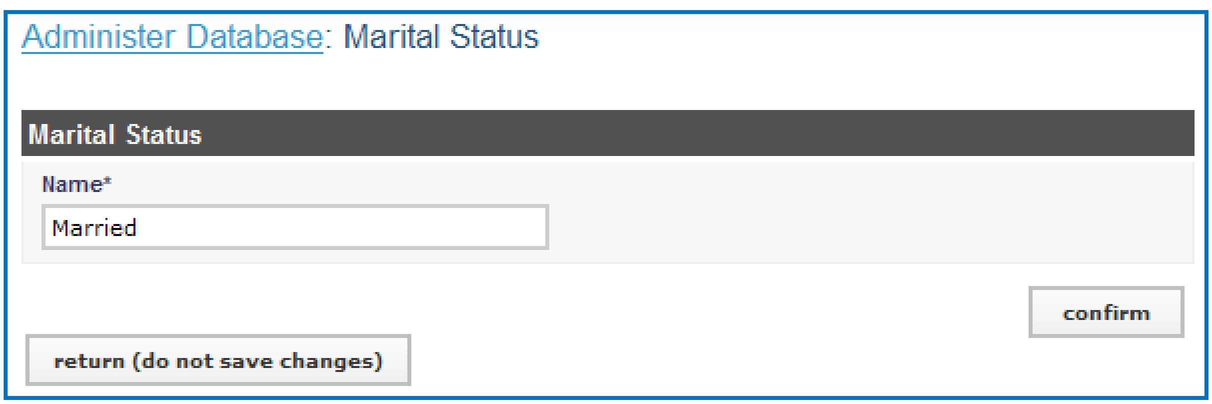


Figure 17: Update marital status

Enter the **Name** of the marital status. Click Confirm and confirm that the name entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it.

5.5.10 Reasons for Movement

Are used to classify the reasons why an employee has left the employment of the organization or has changed positions. Examples of reasons for movement include Promotion, Termination, Layoff, Illness, Death and Out Migration.

Click **Configure System** then click **Administer Database**

Click on Reason for Departure

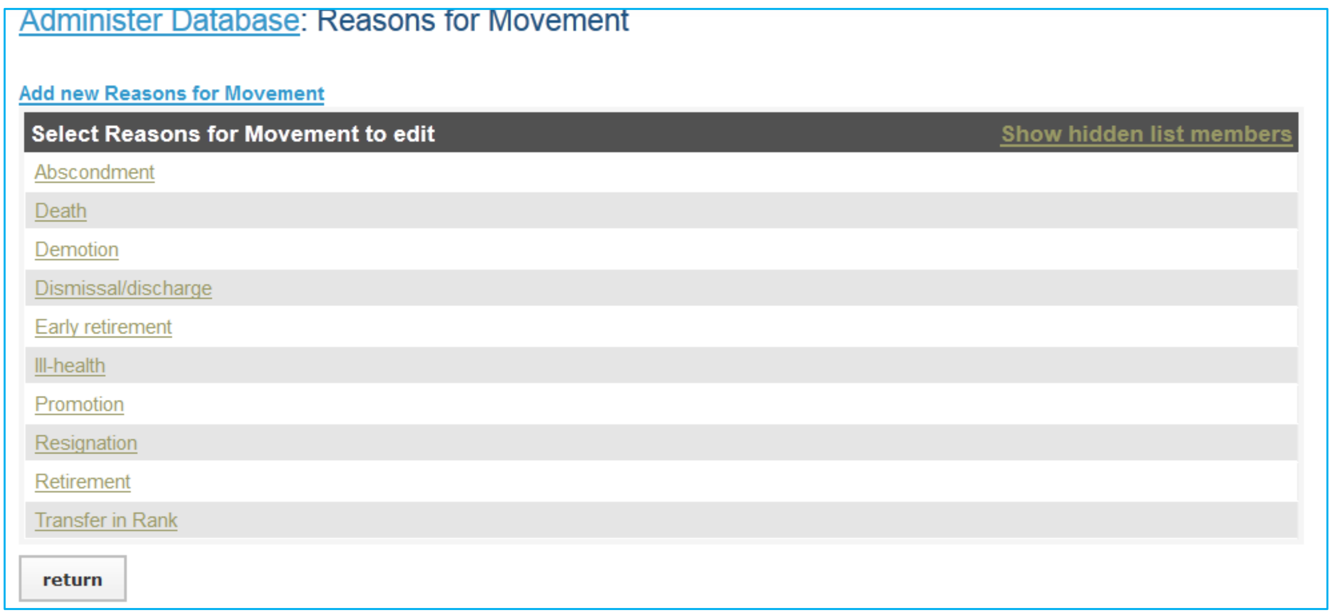


Figure 18: Add new reason for movement

The Reason for Movement page opens, showing all reasons for movement entered in the database. Either Click **Add** Reason for Departure or select a Reason for Departure or click **Update This Information** to edit it.

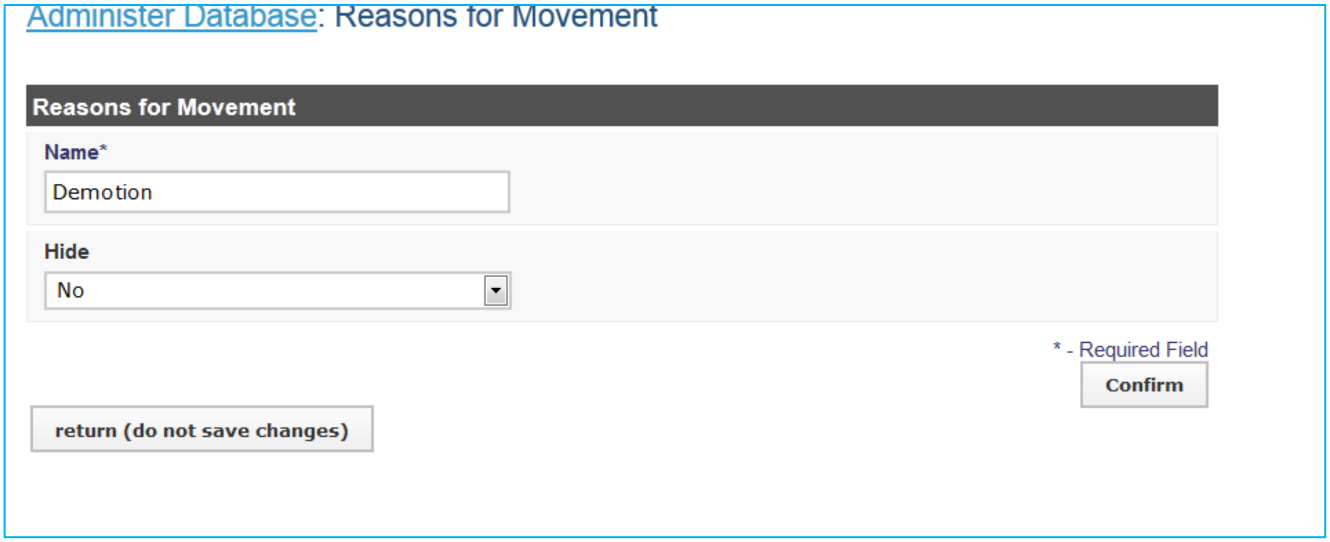
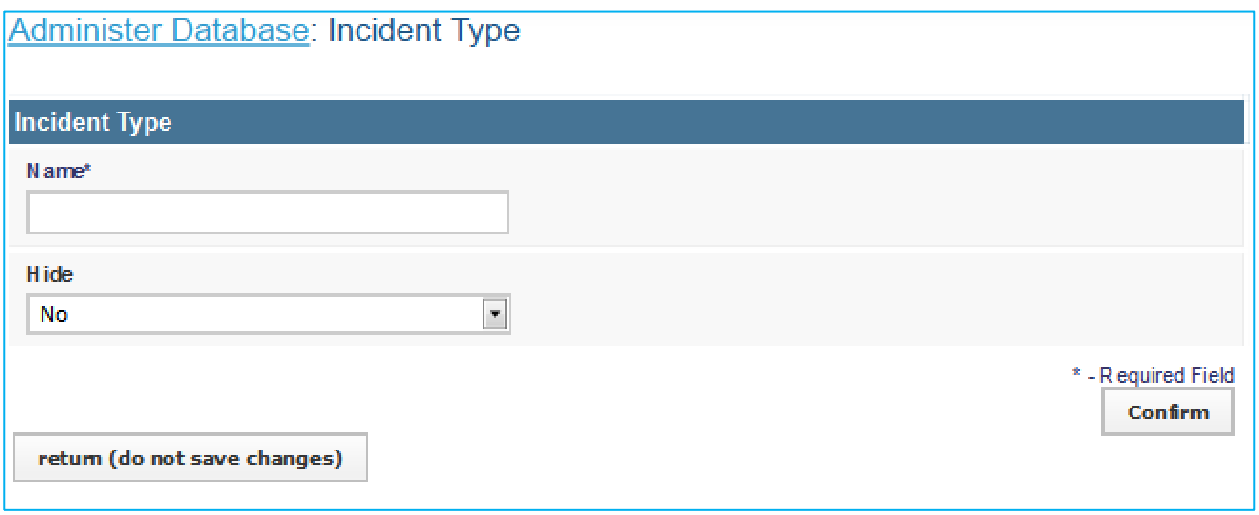


Figure 19: Update Reason for movement

5.5.11 Incident Type

Click **Configure System** then click **Administer Database**

Click on **Incident Type**

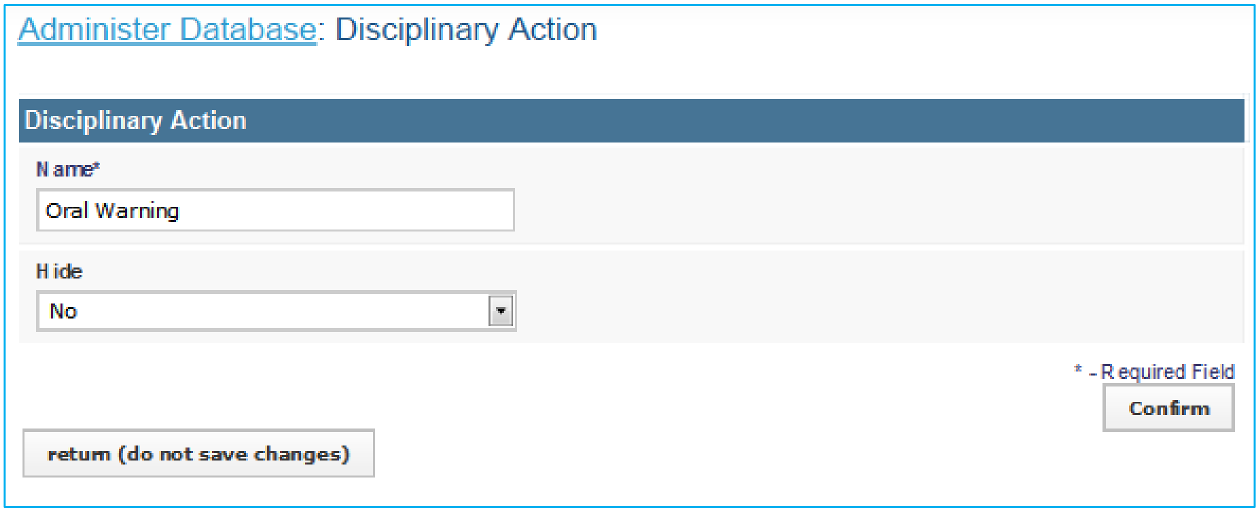


The **Incident Type** page opens, showing all **Incident Types** entered in the database. Click on **Add new Incident Type** or enter the **name** of incident type, click on confirm and save and click **Update This Information** to edit it.

5.5.12 Disciplinary Action Type

Click **Configure System** then click **Administer Database**

Click on **Disciplinary Action Type**

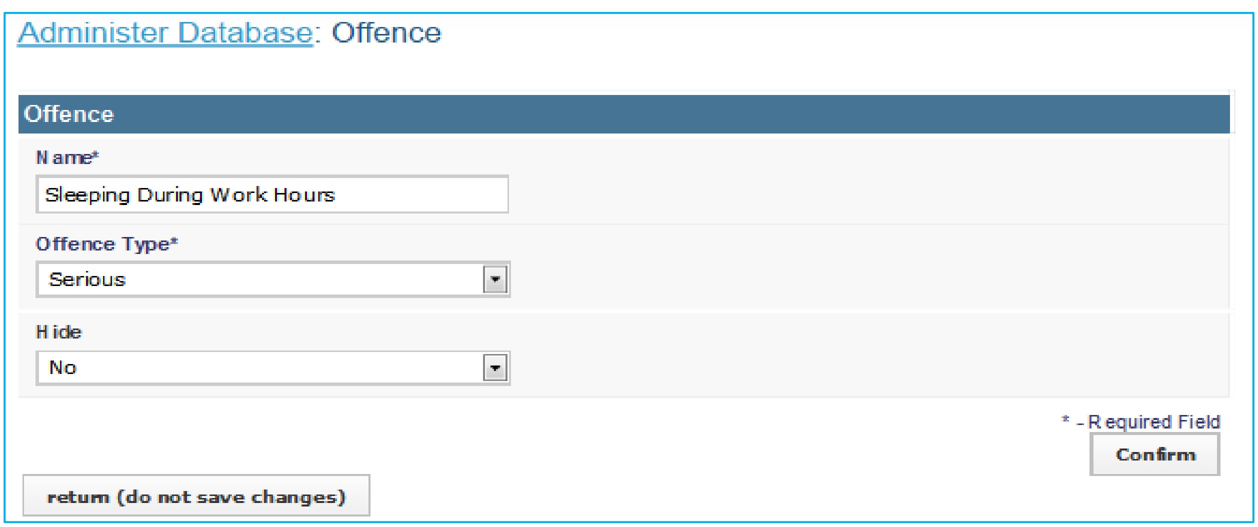


The **Disciplinary Action Type** page opens, showing all **Disciplinary Action Type** entered in the database. Click on **Add new Disciplinary Action Type** or enter the **name** of Disciplinary Action Type, click on confirm and save or click **Update This Information** to edit it.

5.5.13 Disciplinary Offence

Click **Configure System** then click **Administer Database**

Click on **Disciplinary Offence**



The **Disciplinary Offence** page opens, showing all **Disciplinary Offence** entered in the database. Click on **Add new Disciplinary Offence** or enter the **name** of Disciplinary Offence, click on confirm and save or click **Update This Information** to edit it

5.6 Planning Information

5.6.1 Establishment Type

Click **Configure System** then click **Administer Database**

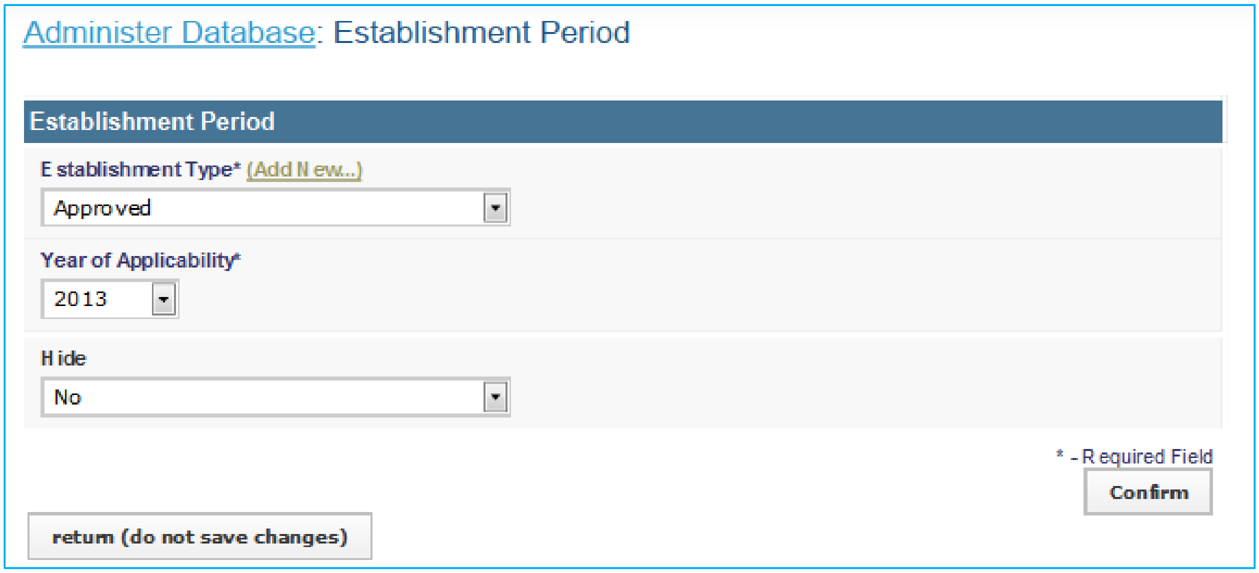
Click on **Establishment Type**

The **Establishment Type** page opens, showing all **Establishment Type** entered in the database. Click on **Add new Establishment Type** and enter the **name** of **Establishment Type**, click on confirm and save or click **Update This Information** to edit it

5.6.2 Establishment Period

Click **Configure System** then click **Administer Database**

Click on **Establishment Type**

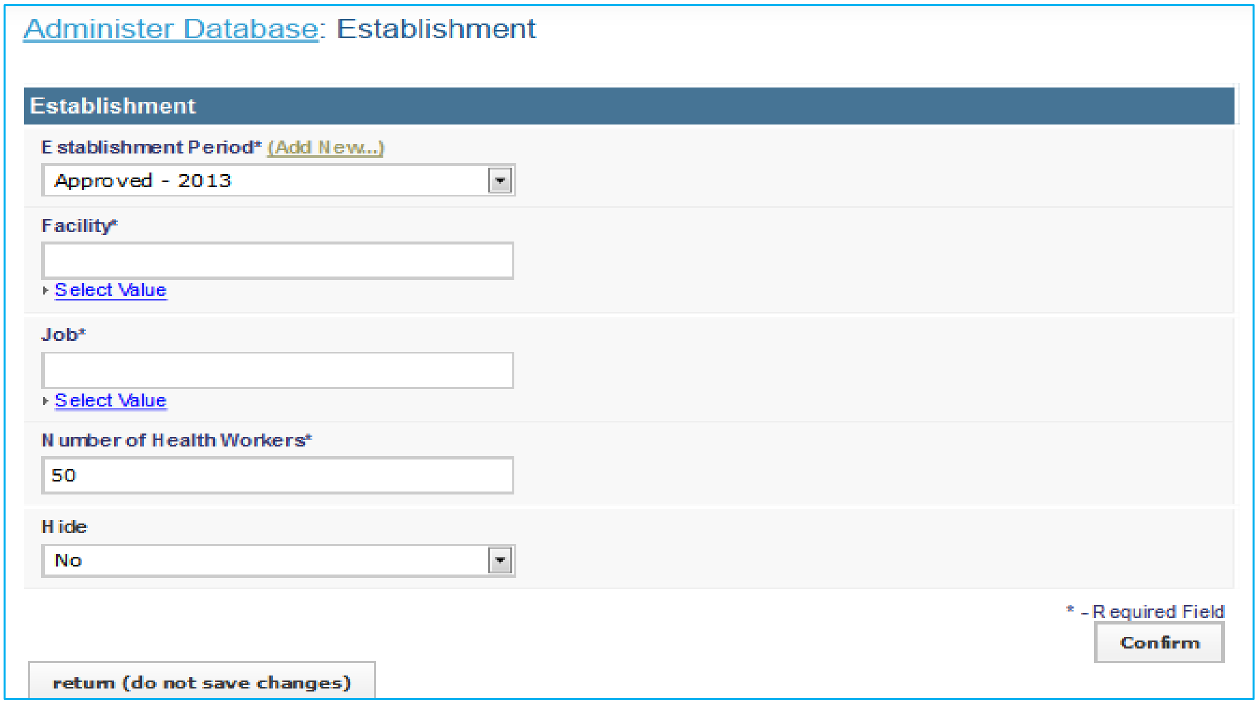


The **Establishment Type** page opens, showing all **Establishment Type** entered in the database. Click on **Add new Establishment Type** and select **Establishment Type** and **Year of Applicability**, click on confirm and save or click **Update This Information** to edit it

5.6.3 Establishments

Click **Configure System** then click **Administer Database**

Click on **Establishment**



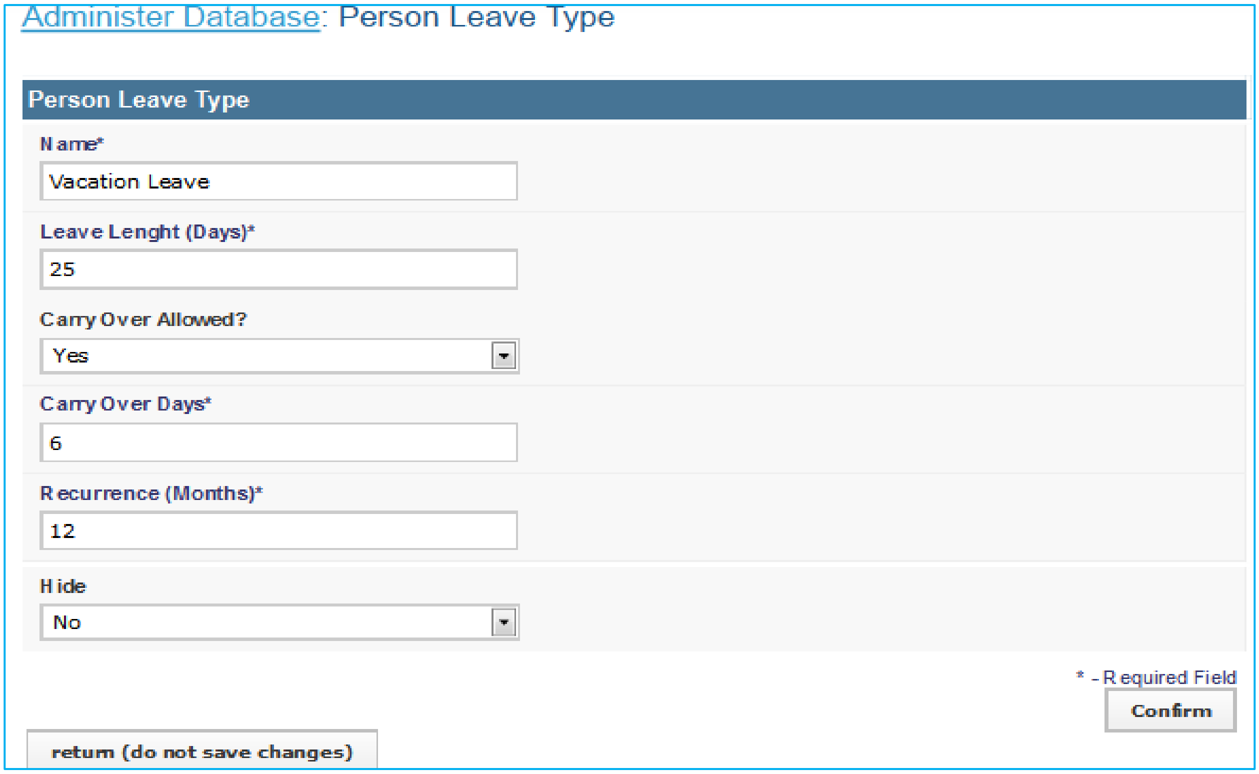
The **Establishment** page opens, showing all **Establishment entered** in the database. Click on **Add new Establishment** and select **Establishment period**, select **Facility**, select **Job and** enter **Number of Health Workers in Establishment** click on confirm and save or click **Update This Information** to edit it.

5.7 Leave Management

5.7.1 Leave Type

Click **Configure System** then click **Administer Database**

Click on **Leave Type**



The **Establishment** page opens, showing all **Establishment entered** in the database. Click on **Add new Establishment** and

Enter name of leave type **Establishment period**,

Enter Number of **Leave Length**

Select Yes /No **for Carry Over Allowed**

Enter number of **Carry over Days** Allowed

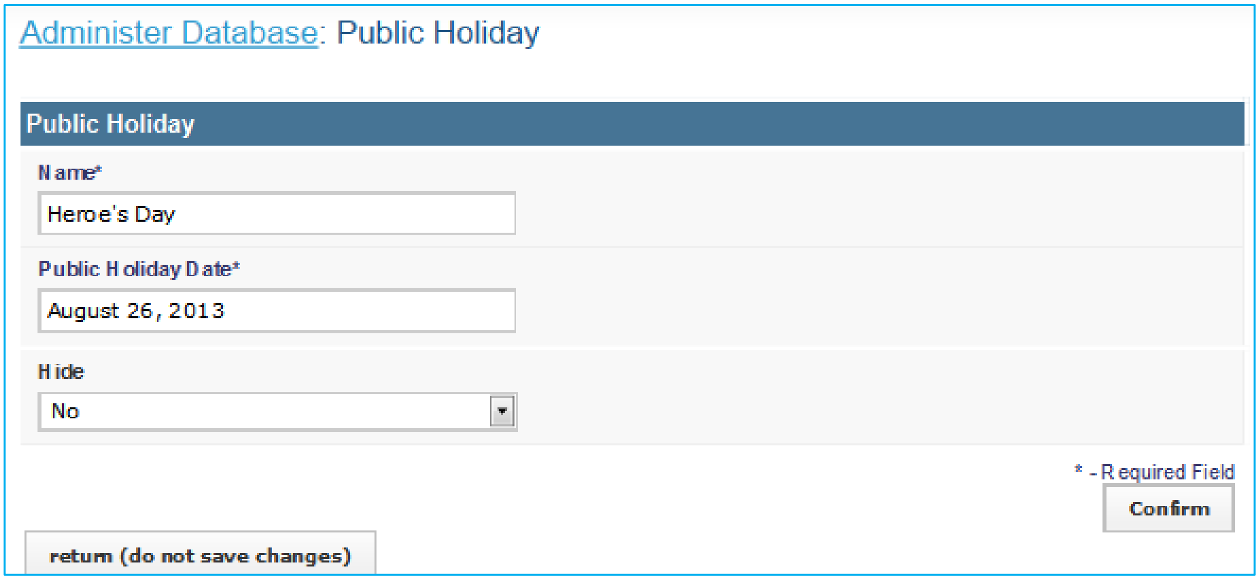
Enter number of **Recurrence**

Click on confirm and save or click **Update This Information** to edit it.

5.7.2 Public Holiday

Click **Configure System** then click **Administer Database**

Click on **Public Holiday**



The **Public Holiday** page opens, showing all **Public Holiday** entered in the database. Click on **Add a Public Holiday** or enter the **name** of Public Holiday and select Public Holiday Date, click on confirm and save or click **Update This Information** to edit it.

5.8 Geographic Information

5.8.1 Country

Country is an independent nation state e.g. Namibia, Zimbabwe. For AMS as many countries can be created, to track employees' nationalities, but only Namibia will be linked to geographical location.

Click **Configure System then click Administer Database.**

Click on Country

The Country page opens, showing all Countries entered in the database. Either Click Add New Country or select an existing Country and click **Update This Information** to edit it.

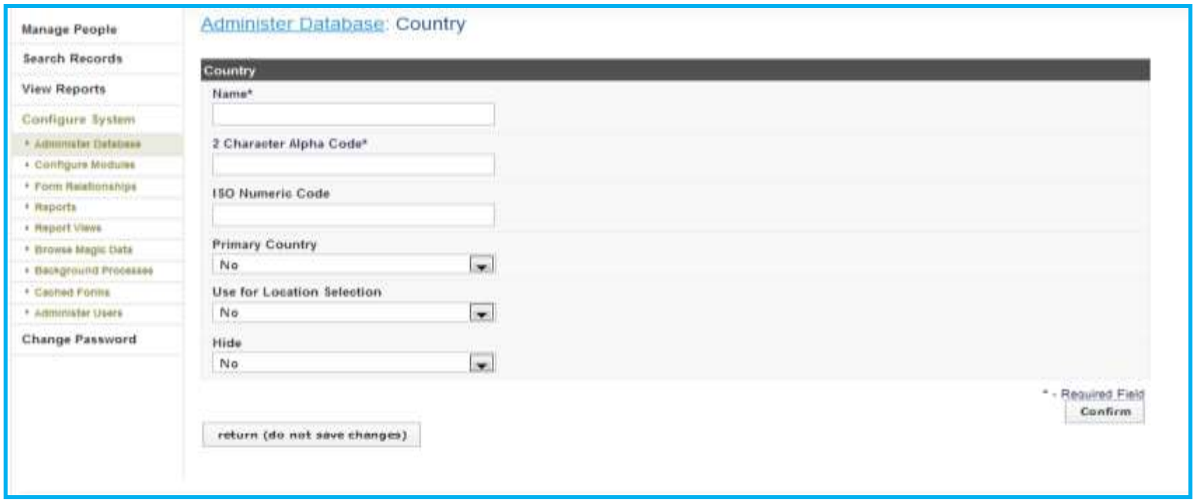


Figure 20: add a Country

5.8.2 Region

A *region* is a major subdivision of a country. Region choices depend on which country is selected; only a region that is associated with a particular country can be chosen when that country is selected e.g. Oshana, Oshikoto etc.

Click **Configure System then click Administer Database.**

Click on Region

The Region page opens, click on View to see all Regions entered in the database.

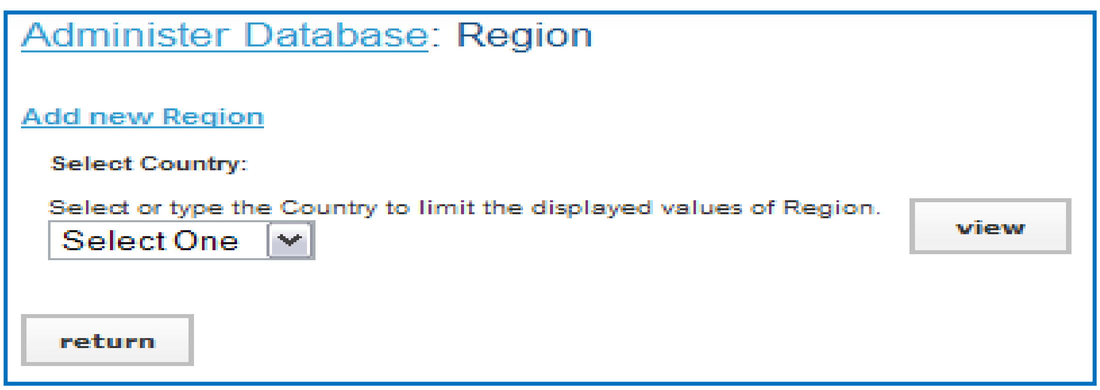


Figure 21: add new region

Either Click Add New Region or select an existing Region and click **Update This Information** to edit it.

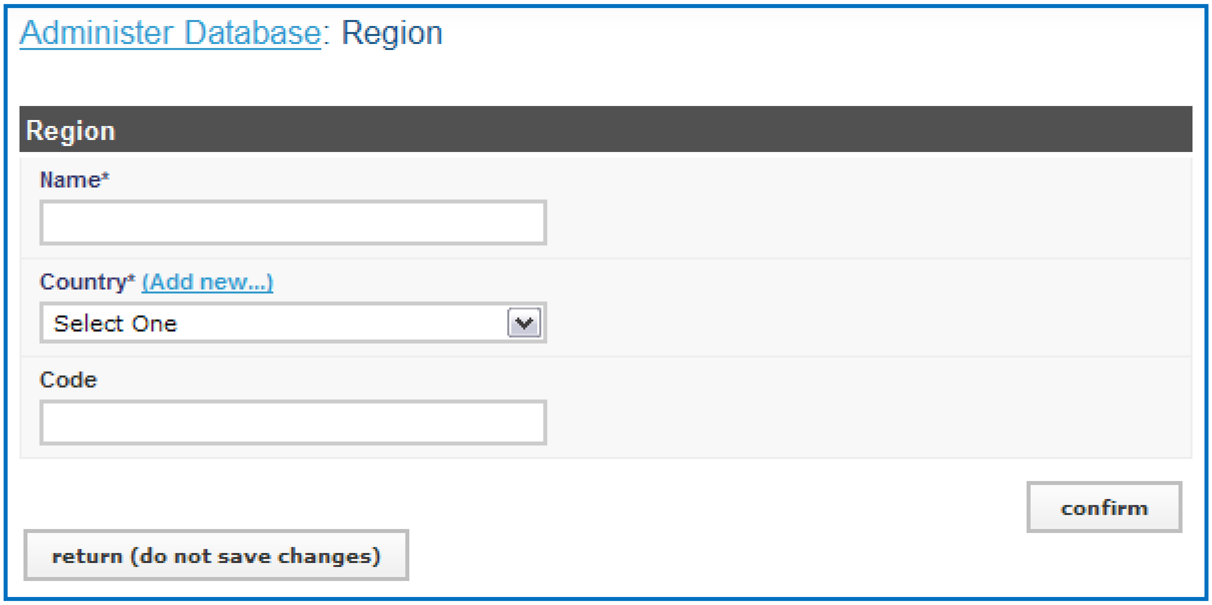


Figure 22: update region

5.8.3 District

District is smaller geographic unit within a region created by the central government for easy administration. For AMS all have been set up and linked to national regions E.g. **Oniipa is linked to Oshikoto region.**

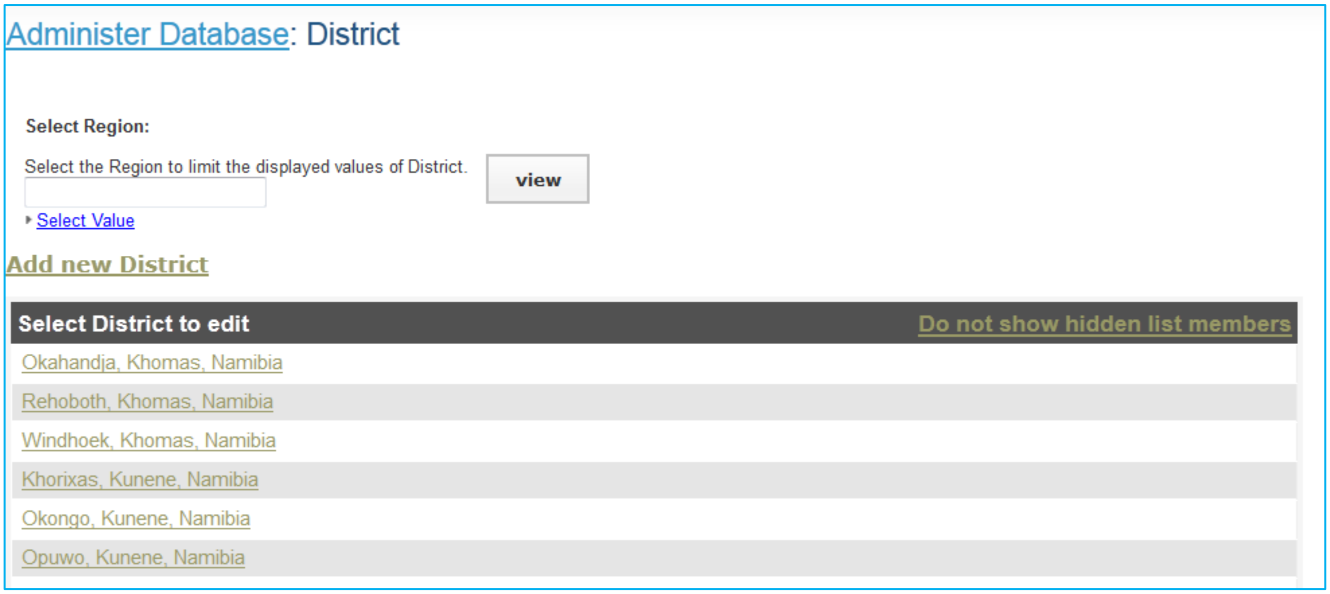


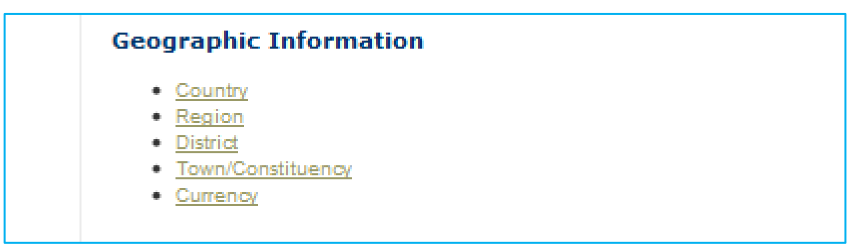
Figure 23: View and add new district

5.8.4 Town/Constituency

A Town/Constituency is a smaller geographical division within a district. Town/Constituency choices depend on which district is selected; only a Town/Constituency that is associated with a particular district can be chosen after that district is selected. For any district entered in the system, you may add multiple Town/Constituencies

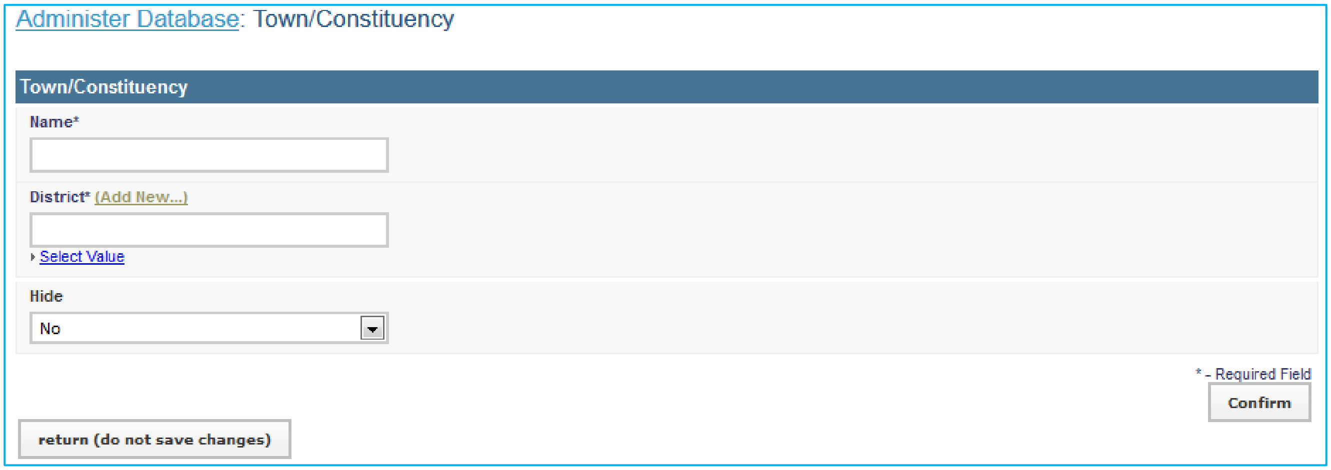
From the home page or left menu, click Administer Database under Configure System.

In the "Geographic Information" section, select Town/Constituency.



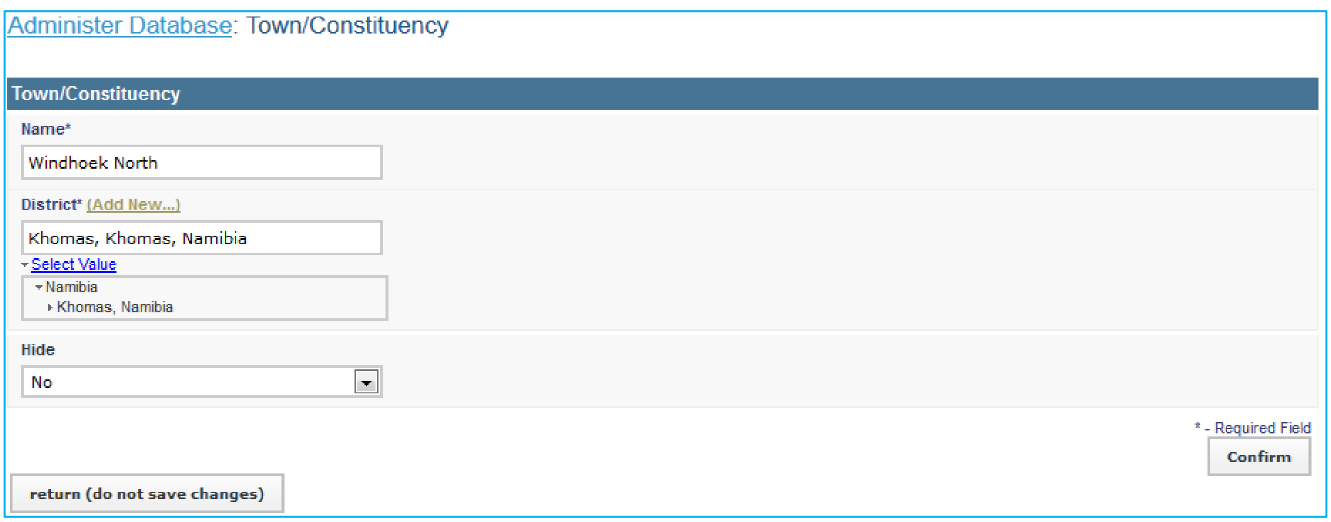
The Town/Constituency page opens. Click Add New Town/Constituency. (To edit an existing Town/Constituency, type or select the district where it is located and click the View button; then click the Town/Constituency's name and click Update This Information.)

Enter or exit the **Name** of the Town/Constituency.



The Town/Constituency form opens. Type the name of the District or select the Country, the Region and the District in which the Town/Constituency is located.

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

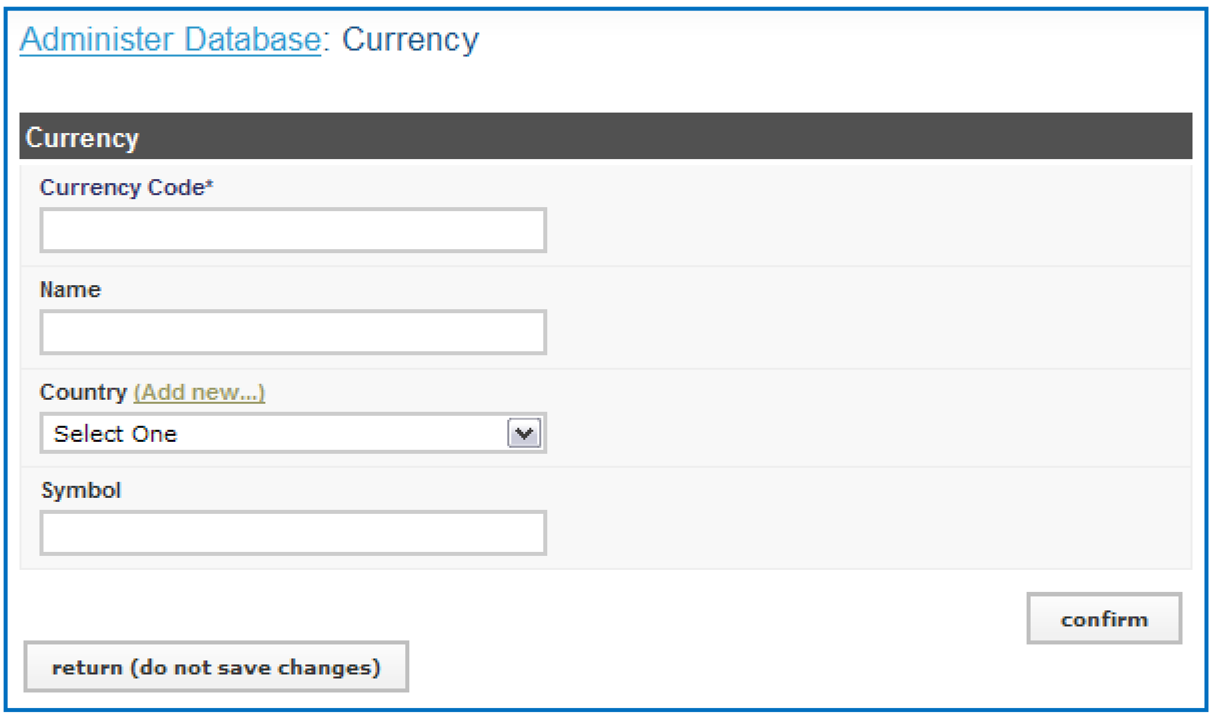


5.8.5 Currency

The medium of exchange of money used in a country or other location. Currency is used for defining how salaries and benefits are paid – again it should be remembered that this information will be management information only and is not linked to the payroll. The base currency used is the Namibian Dollar (N$).

Either Click Add New Currency or select an existing Currency and click **Update This Information** to edit it.

The Currency form opens. Enter the **Currency Code**, an abbreviation that will identify the currency in selection menus.
Enter the **Name** of the currency (optional).
Select the **Country** for the currency (optional).



Enter the **Symbol** for the currency; the symbol will also appear in selection menus (optional). Click Confirm and confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it.

5.9 Training Course Information

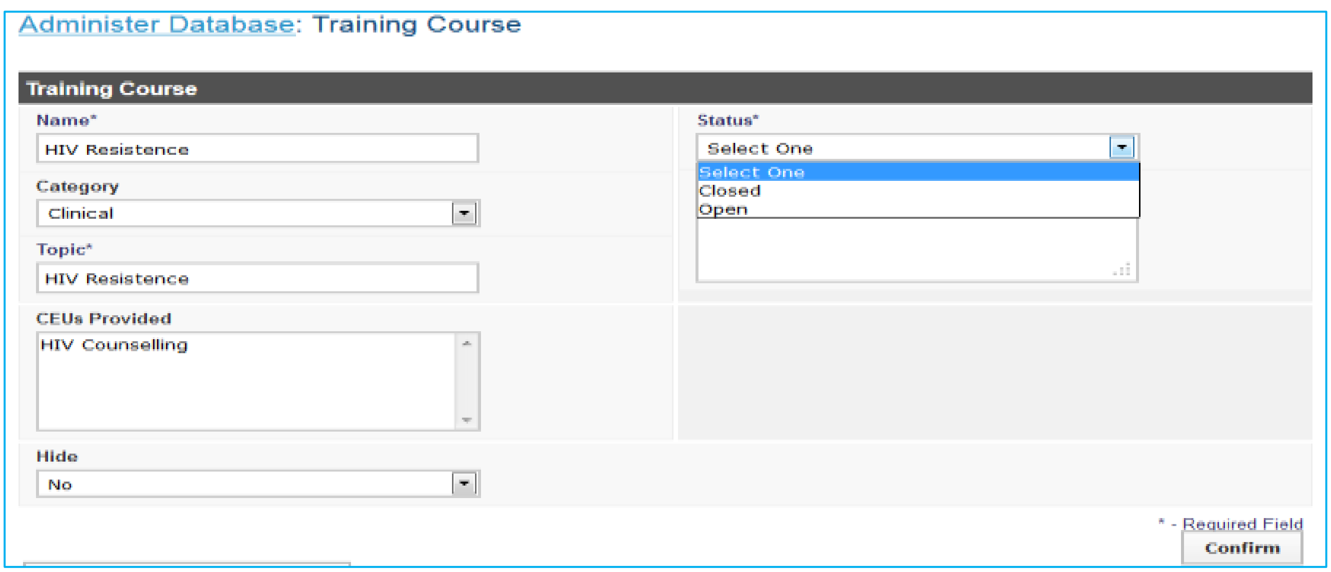
5.9.1 Training Courses

A training course is a course that an employee may take to gain new competencies or continuing education credits. A training course covers only one topic, but it may have multiple classes that are available for employees to attend. Either the Training Manager or the HR Manager can add a training course.

In the "Training Course Information" section, select Training Courses.

Select **Add New Training Course** and click the **Add button**, or select an existing training course to edit from the menu.

- Enter the Name of the *training course*.
- Select the *Category* of the training course.
- Enter the *Topic* of the course
- Select any CEUs (continuing education units) earned by completing the course; hold down the CTRL key and click to select more than one.
- Select the training course Status.



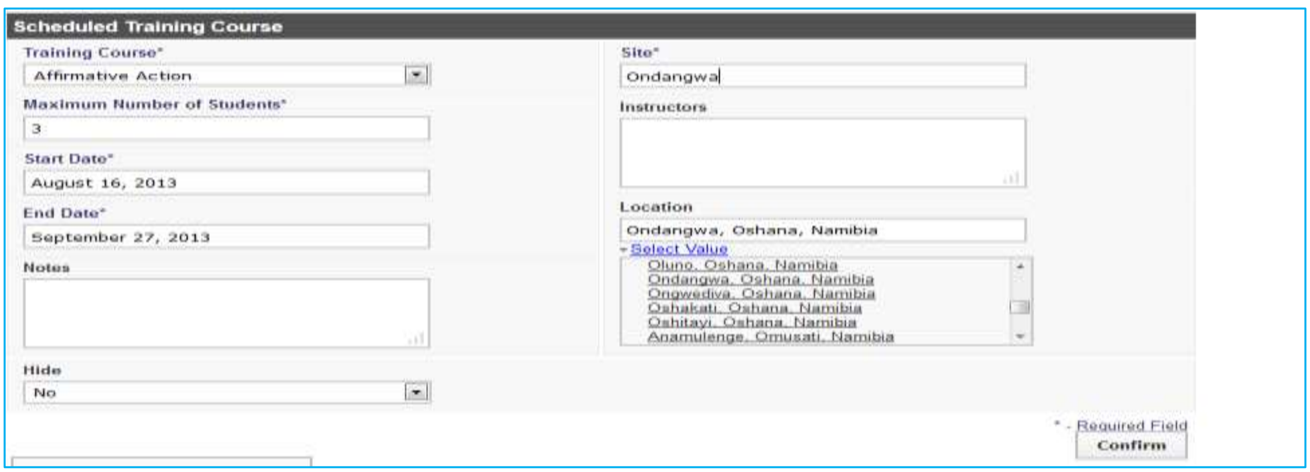
Click on **Confirm**, then click **save**.

5.9.2 Scheduled Training Courses

After adding a training course, you need to schedule at least one class for that course. The class information includes the dates of the class and the location where the class is given. When an employee is scheduled to take a training course, that employee is assigned to one of these classes. A training course can have several classes.

Under "Scheduled Courses" click **Schedule a Course**.

- Enter the Maximum *Number of Students* who can attend the class.
- Select the *Start Date* and *End Date* for the class (today's date is entered for both by default).
- Enter any Notes about the class.
- Enter the class's Site, or the *location* where the class is taking place.
- Enter the name(s) of the class's *Instructors*, if known.
- Select the Country, District and *Town/Constituency* where the class is located (optional).



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

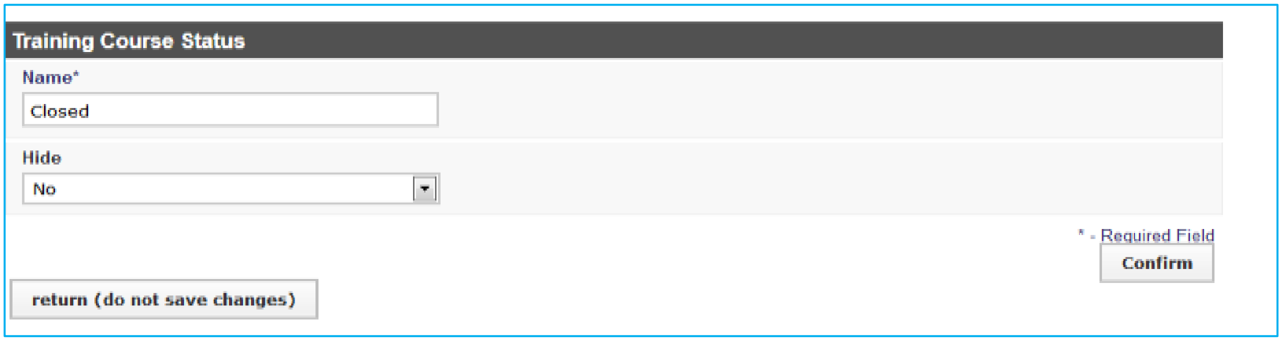
5.9.3 Status of a Training Course

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

In the "Training Course Information" section, select Status of a Training Course.

1. Either select Add New Training Course Status or select an existing status to edit.

2. Enter the Name of the status.



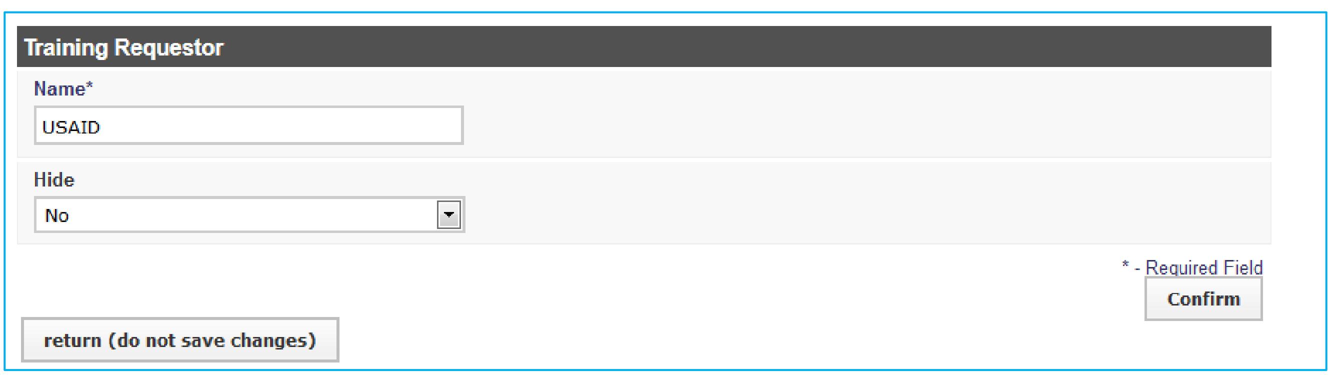
Click **Confirm** and confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click **Save** to save it.

5.9.4 Requestors of a Training Course

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

In the "Training Course Information" section, select Requestors of a Training Course.

- Either select Add *New Training Requestor* or select an existing requestor name to edit.
- Enter the Name of the *requestor*.



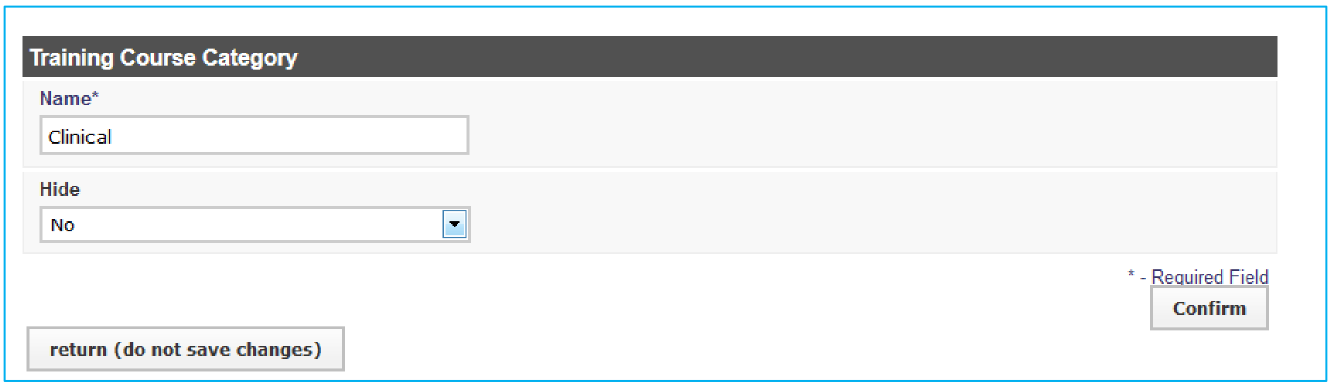
Click **Confirm** and confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click **Save** to save it.

5.9.5 Category of a Training Course

A pre-service, multi-year educational program offered by a training institution that, when completed, qualifies a person to be registered or licensed in a particular cadre.

In the "Training Course Information" section, select Category of a Training Course.

a) Either select *Add New Training Course Category* or select an existing category to edit.
b) Enter the *Name of the category*.



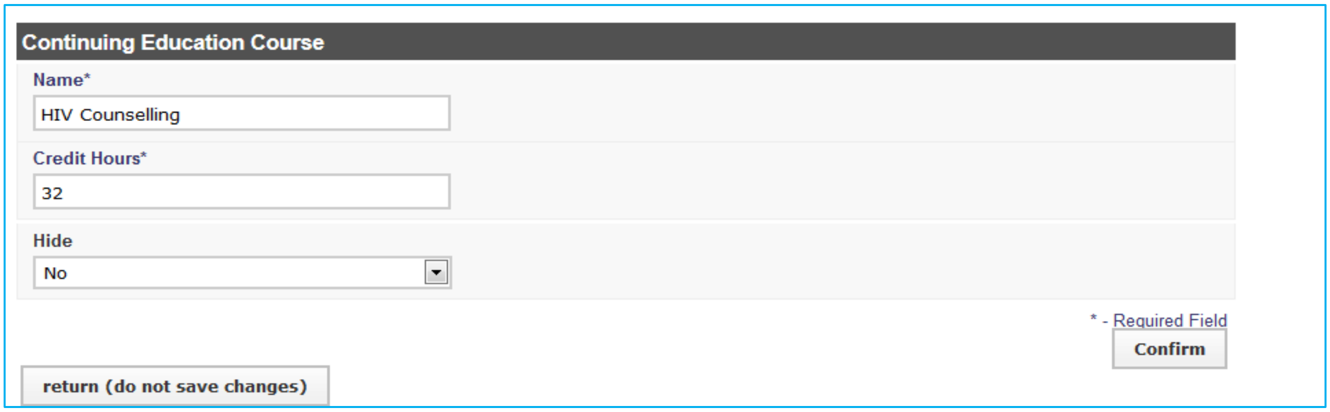
Click **Confirm** and confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click **Save** to save it.

5.9.6 Continuing Education Course

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

In the "*Training Course Information*" section, select Continuing Education Course.

- Either select Add New Continuing Education Course and click the Add button, or select an existing course to edit from the menu and click the View button, then click Update This Information.
- Enter the *Name of the continuing education course*.
- Enter the number of *Credit Hours* earned by completing the course.



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

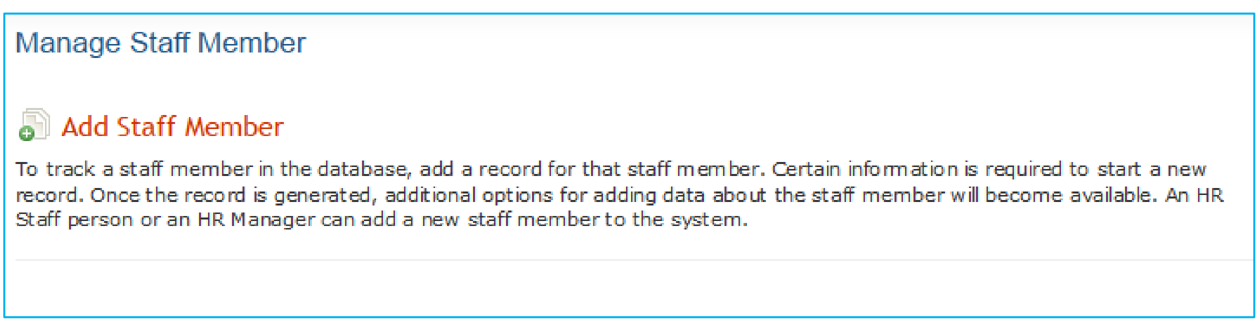
6 MANAGING EMPLOYEE RECORDS

6.1 Manage Staff Members

Manage Staff Member to add a new employee or applicant record to the system. If you were using the job application module, you can also complete applications for open positions, review completed applications and assign a position to the successful applicant.

6.1.1 Add Staff Member

To track of employee in formation in the database a records for that employee by clicking on Add Employee option. Certain information is required to start a new record. Once the record is generated, additional options for adding data about the employee will become available.



<u>**The Add Employee form opens.**</u>

1. Enter the employee's **Surname**, **First Name** and any **Other Names** in the appropriate fields.
2. Select the employee's **Nationality** from the menu.
3. Type or select the name of the employee's **country**, **region** and **district** of residence under Residence.

4. Click *Confirm* and confirm that the information entered is correct.

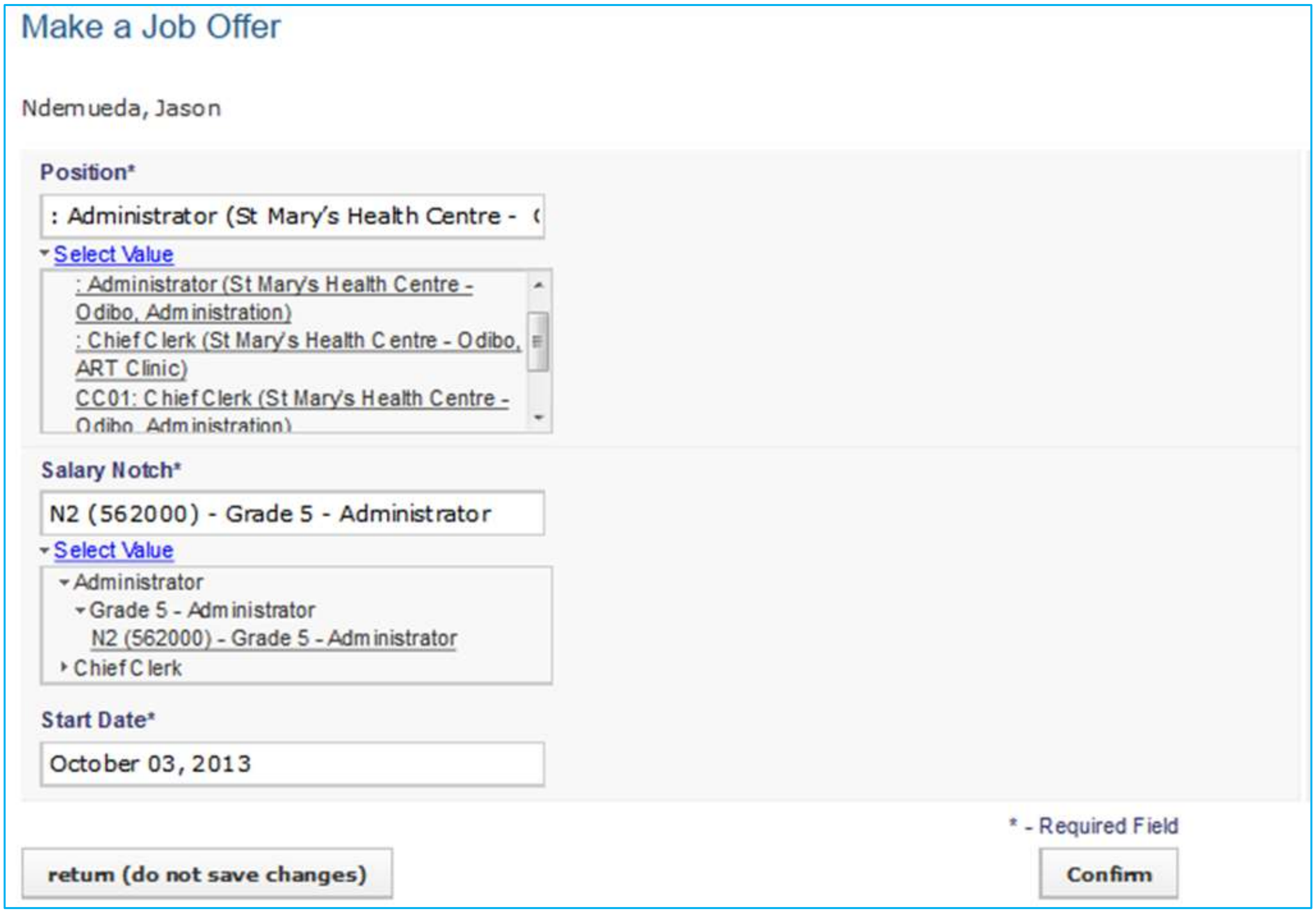
6.1.1 Set position

This step will appoint the person in his/her new position in the facility he/she has been transferred to.

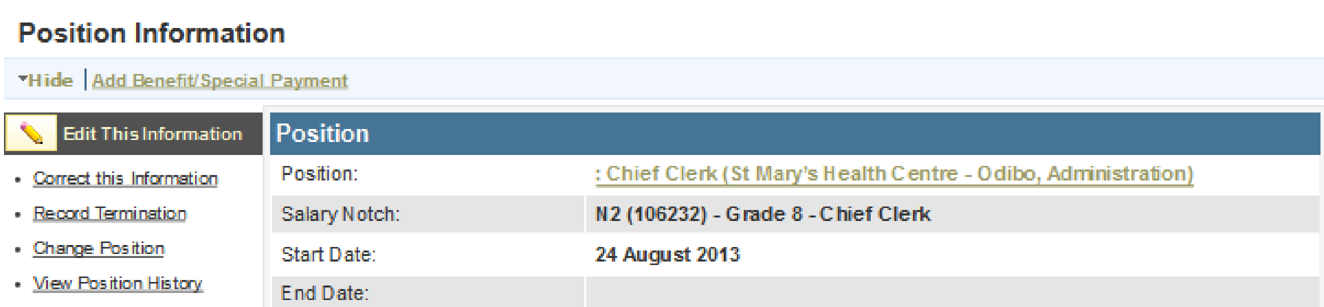
The Make a Job Offer form opens

Select the **position** and **salary notch**

The Start Date for the new position is set to today's date by default. If this is not correct, change it.



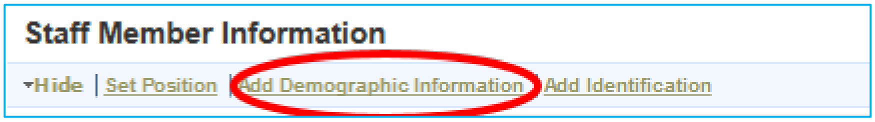
Click Confirm and confirm that the information entered is correct. If it is not correct, click update this information Edit to change it. If it is, click Save to save it.



6.1.2 Add Demographic Information

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

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


Staff Member Information
Hide | Set Position | Add Demographic Information | Add Identification

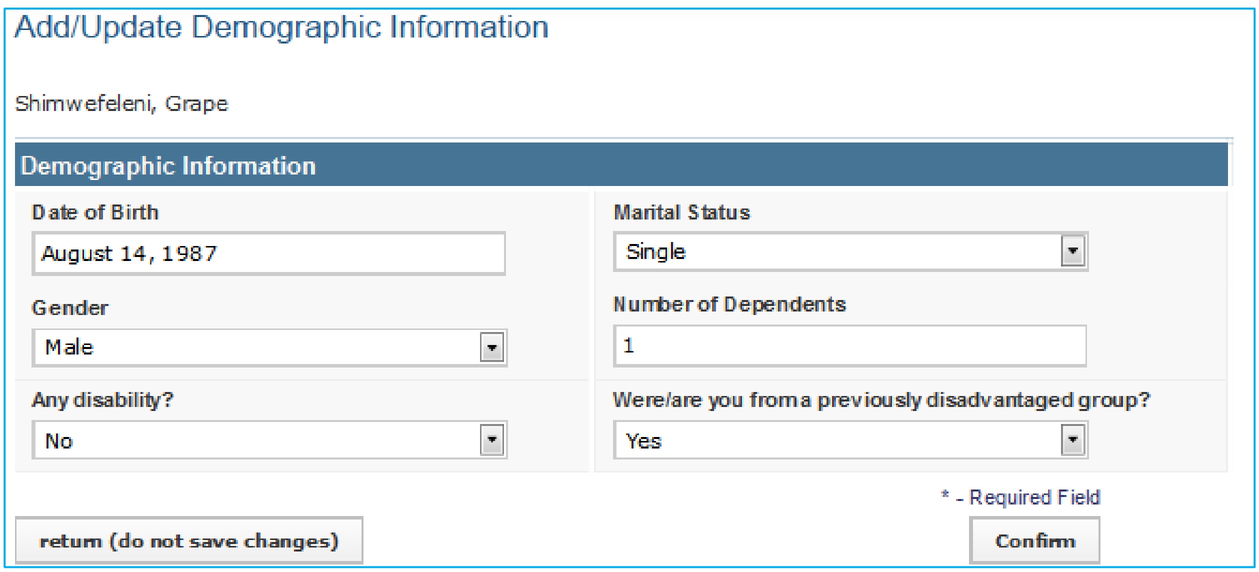
The Demographic Information form opens.

1. Set the employee's **Date of Birth.**

2. Select the employee's **Gender.**

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

4. Enter the **Number of Dependents** for the employee.


Add/Update Demographic Information

Shimwefeleni, Grape

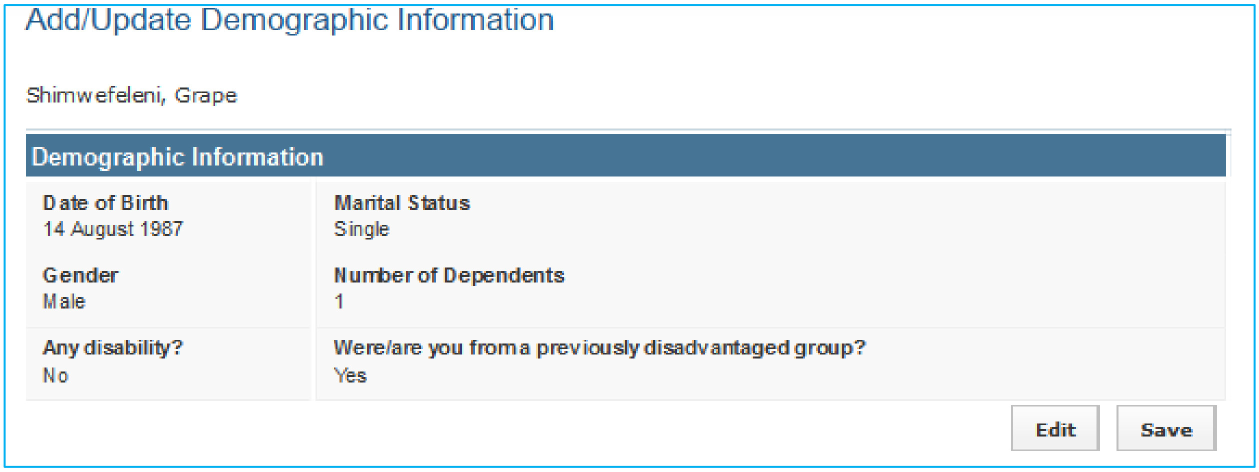
Demographic Information

Date of Birth: August 14, 1987	Marital Status: Single
Gender: Male	Number of Dependents: 1
Any disability?: No	Were/are you from a previously disadvantaged group?: Yes

* - Required Field

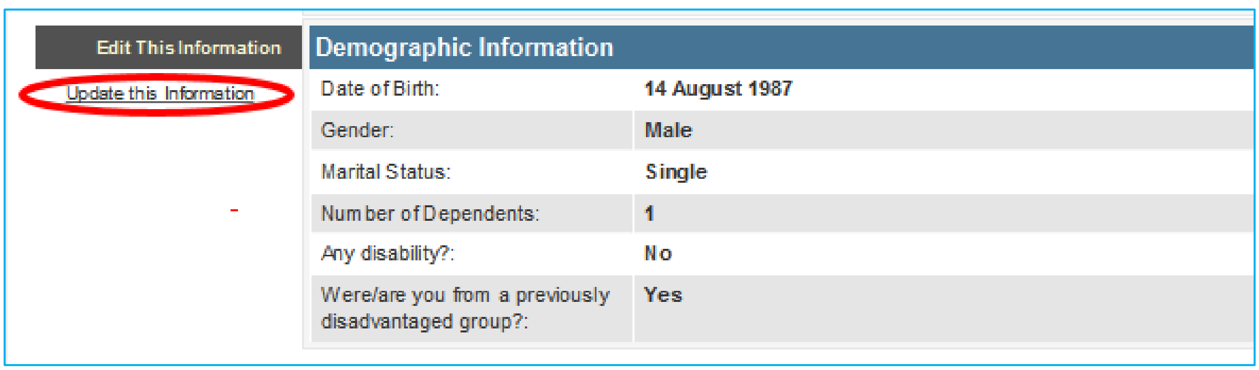
return (do not save changes) | Confirm

5. Click *Confirm* and confirm that the information entered is correct.



6. If it is not correct, click *Edit* to change it. If it is, click *Save* to save it.

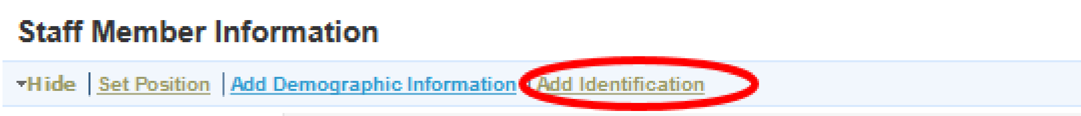
The demographic information that you just entered displays in the employee's record. If any of the information needs to be changed, click Update this information to edit it.



6.1.3 Add Identifications

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

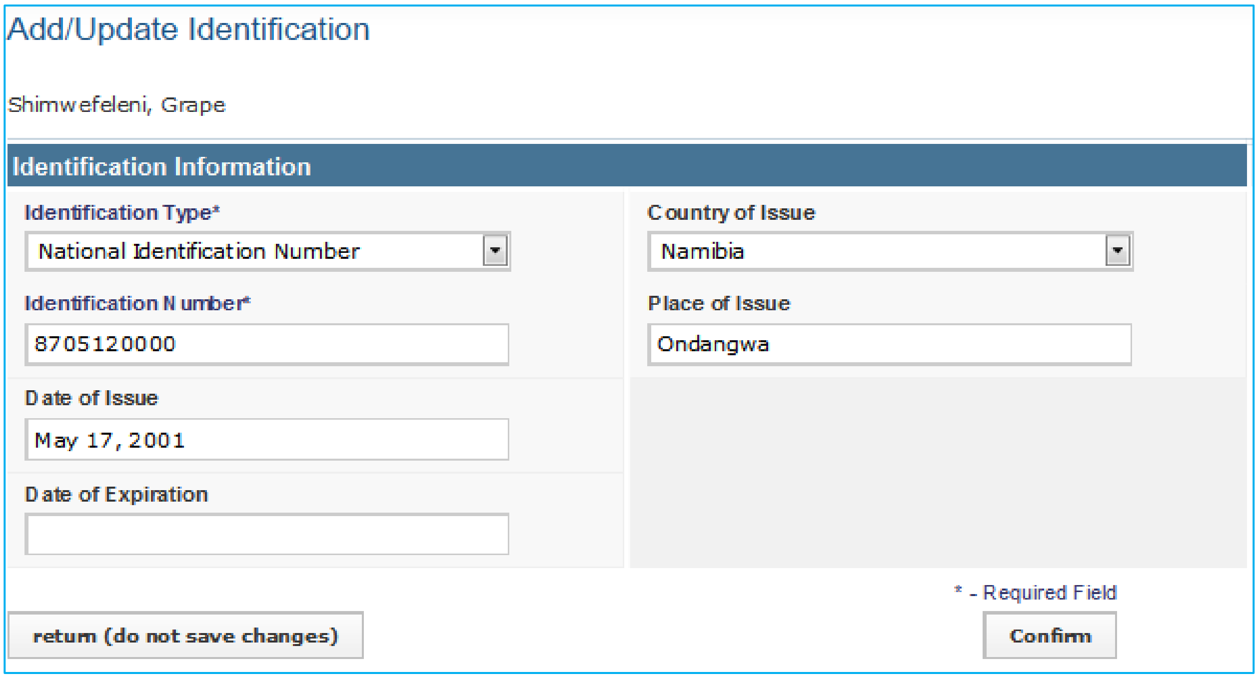
In the employee's record under the "Individual Information" section, click Add Identification.



The Identification form opens.

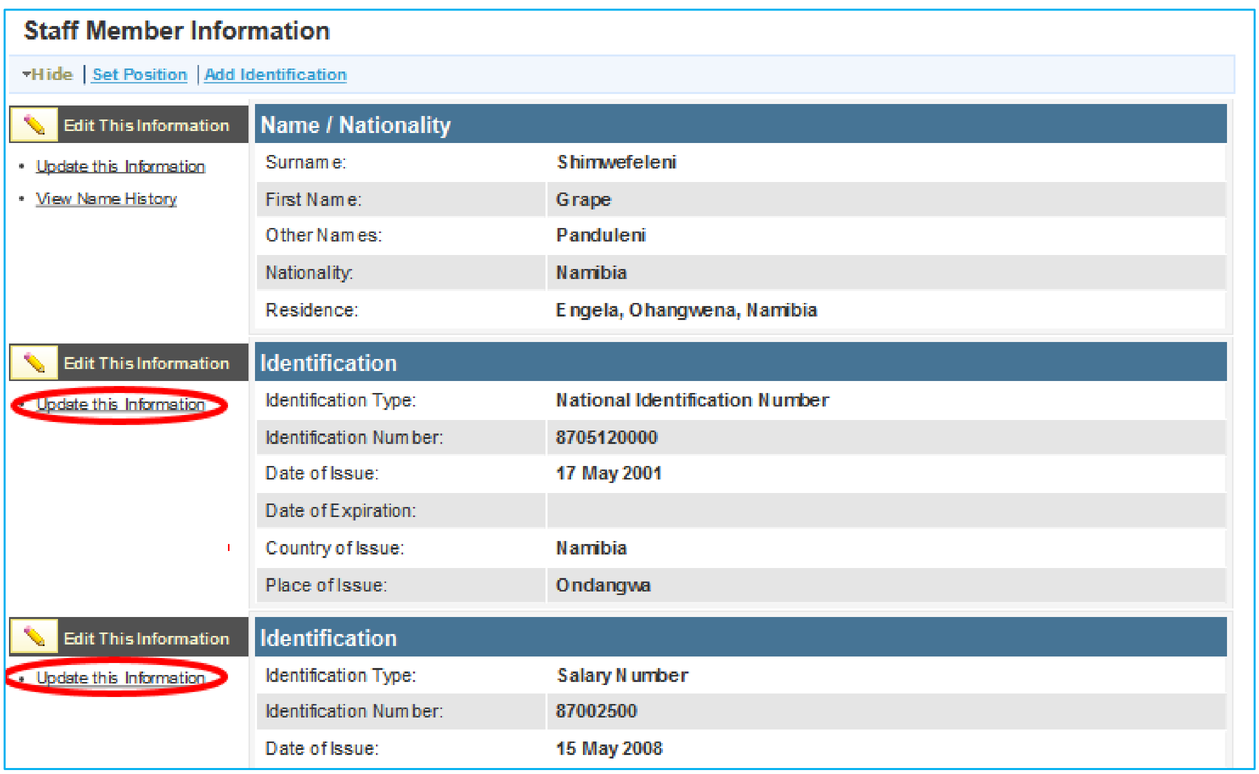
1. Select the **Identification Type**.

2. Enter the number or other identifier for the identification in the **Identification Number** box.
3. Select the **Country of Issue**
4. Enter **Place of Issue**



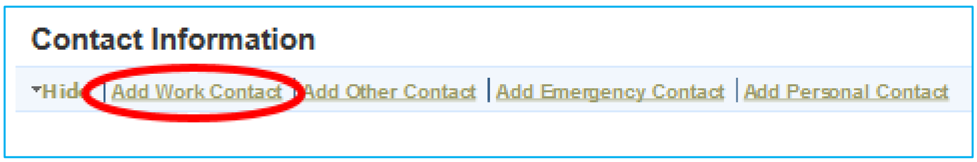
5. Click Confirm and confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it

If any of the identification information needs to be changed, click Update this information beside the incorrect identification to edit it.



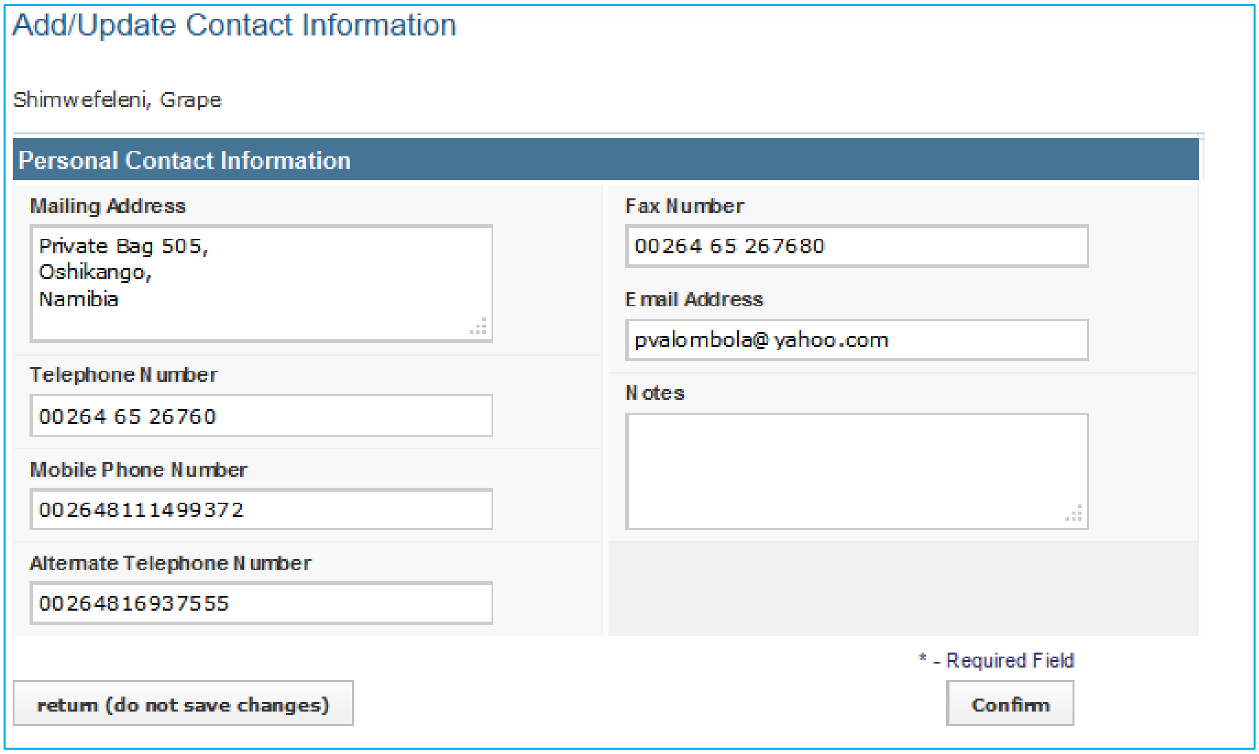
6.2 Add/Update Contact Information

For each employee in the system, whether an employee or a job applicant, four types of contact information may be added: personal, or home, contact; work contact; emergency contact; and other contact. Only one contact may be added for each type. Contact information may be added at any time after the record is created. All contact fields are optional.



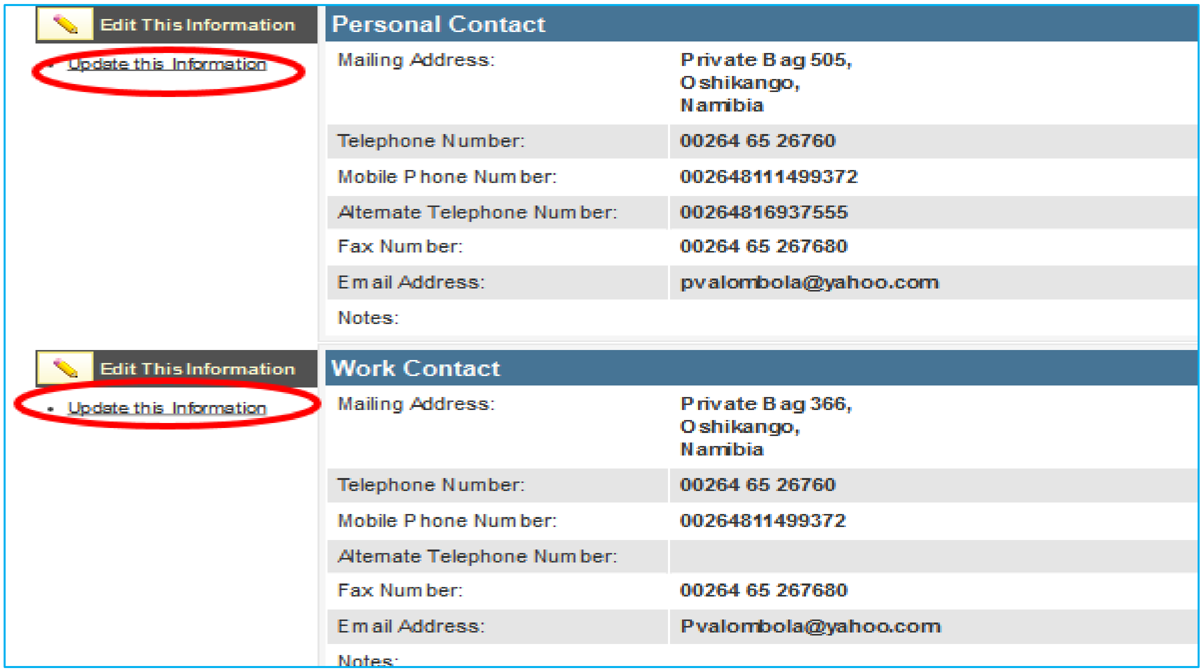
The Contact Information form opens.

1. Enter the full **Mailing Address.**
2. Enter a primary **Telephone Number**.
3. Enter an **Alternate Telephone Number**, such as a mobile phone.
4. Enter a **Fax Number**.
5. Enter an **Email Address**.
6. Enter any Notes, such as the name of an **emergency contact**.



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

The contact information that you just entered displays in the employee's record. Repeat these steps for each type of contact to add for the employee.

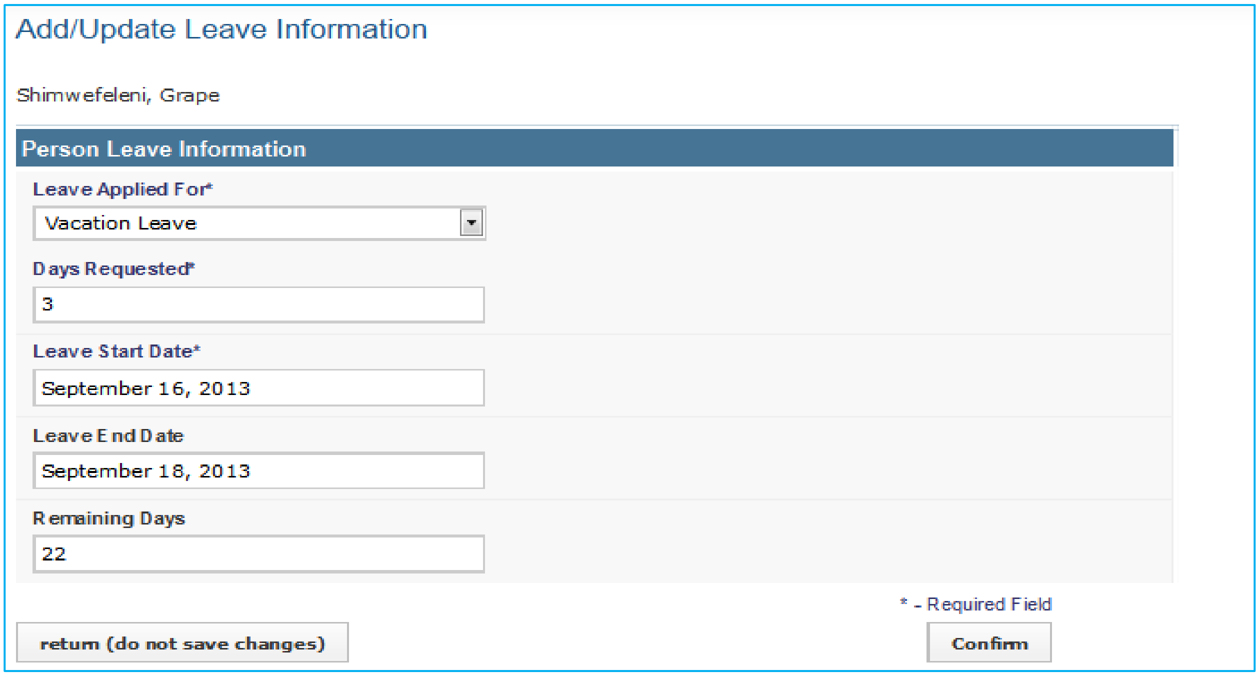


If any of the information needs to be changed, **click Update this information** beside the incorrect contact information to edit it

6.3 Employee Leave Information

The Leave Information form opens.

1. Enter type of **Leave Applied for.**
2. Enter Number of **Days requested**.
3. Enter **Leave Start Date**.
4. Enter **Leave End Date**.
5. Enter an **Email Address**.
6. Enter number of **Remaining Leave days**



Add/Update Leave Information

Shimwefeleni, Grape

Person Leave Information

Leave Applied For*
Vacation Leave

Days Requested*
3

Leave Start Date*
September 16, 2013

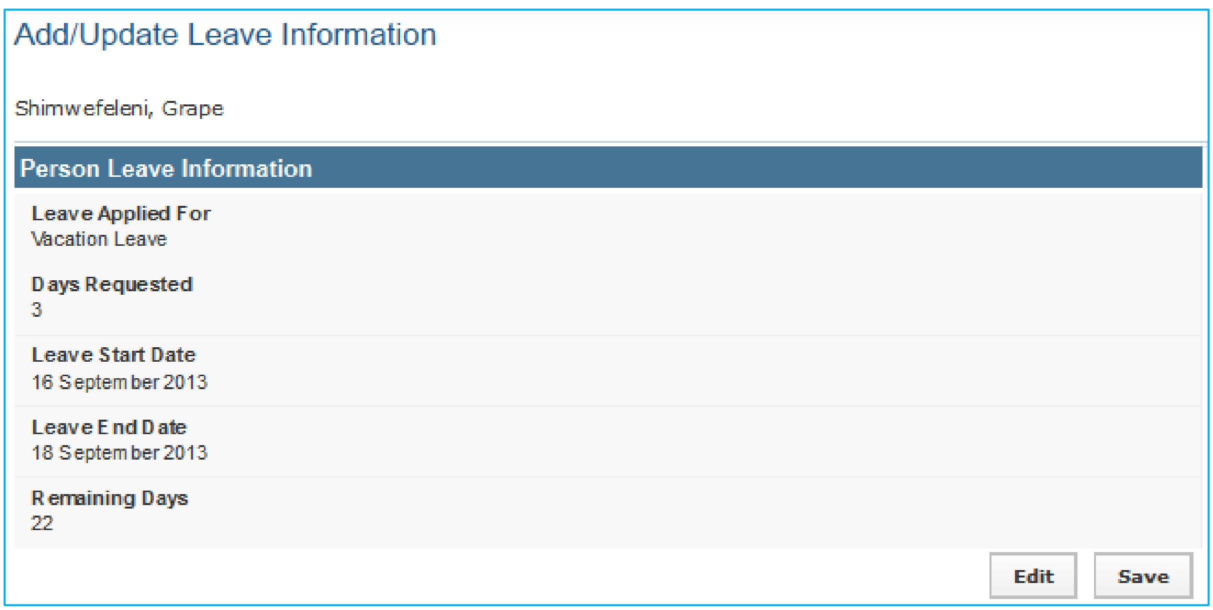
Leave End Date
September 18, 2013

Remaining Days
22

* - Required Field

return (do not save changes) | Confirm

7. Click Confirm and confirm that the information entered is correct.



Add/Update Leave Information

Shimwefeleni, Grape

Person Leave Information

Leave Applied For
Vacation Leave

Days Requested
3

Leave Start Date
16 September 2013

Leave End Date
18 September 2013

Remaining Days
22

Edit | Save

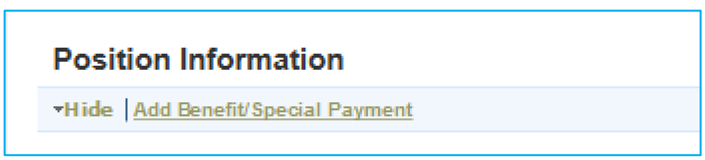
8. If it is not correct, click *Edit* to change it. If it is, click *Save* to save it

If any of the information needs to be changed, **click Update this information** beside the incorrect the Leave Information to edit it.

6.4 Add/Update Position Information

6.4.1 Add a Benefit

If an employee receives an irregular or one-time benefit or special payment -- such as an allowance, travel advance or relocation payment -- in addition to the regular salary, that can be noted in the employee's record under the employee's Position Information.



Click Add Benefit/Special Payment.

The Benefits form opens.

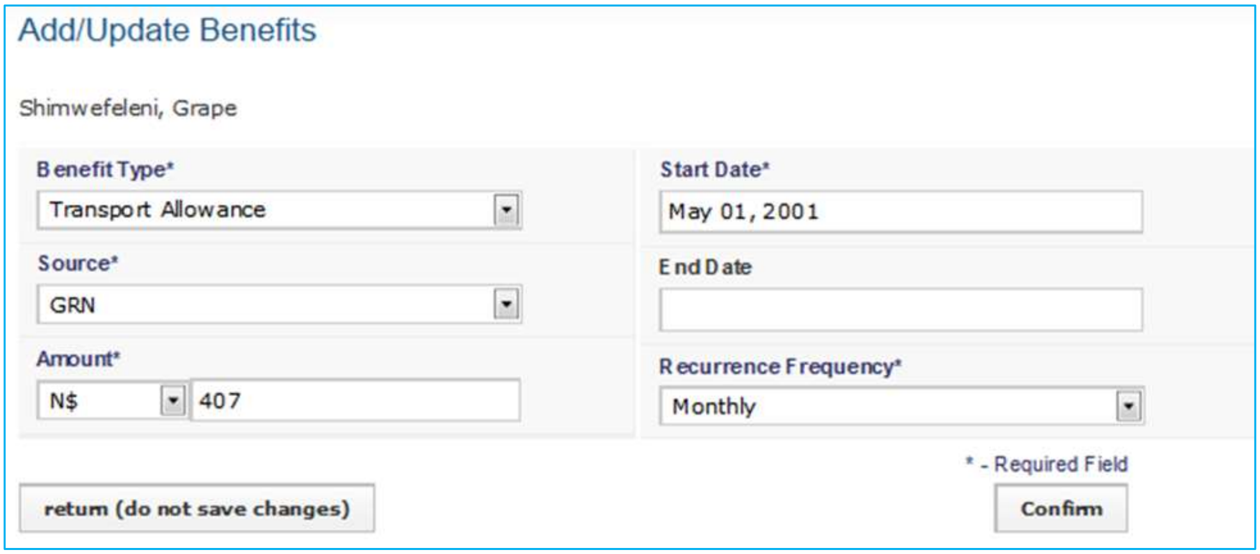
1. Select the **Benefit Type**.

2. Select the **Source of the payment**.

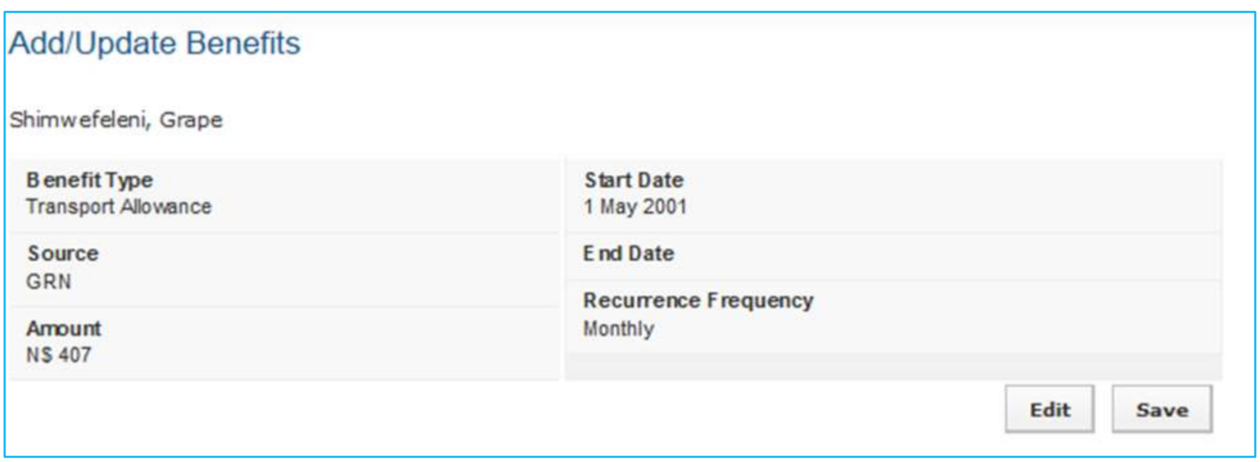
3. Select the Currency for the payment and enter the Amount.

4. Select the Start **Date of the payment.**

5. Select the **End Date of the payment.**
6. Select the **Recurrence Frequency** of the payment: once, weekly, monthly or yearly. If the frequency is set to "once," the start date and end date should be the same or the end date may not be entered.

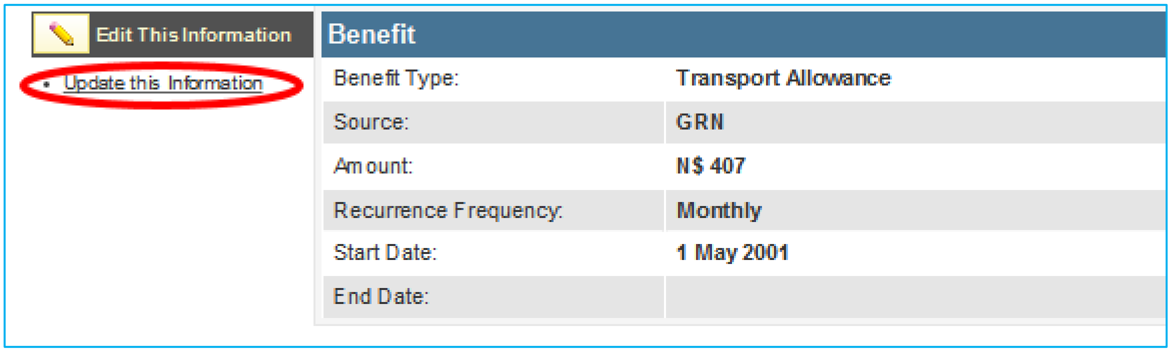


7. Click Confirm and confirm that the information entered is correct. If it is not correct, click Edit to change it. If it is, click Save to save it.



The information that you just entered displays in the employee's record under the "Position Information" section. Additional benefits or special payments can now be added. For each new benefit, click Add

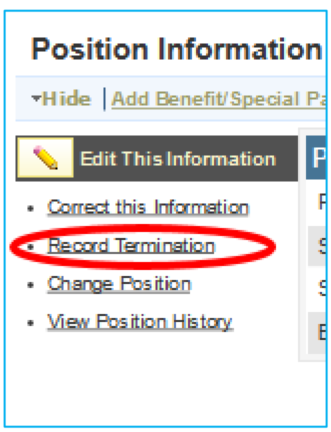
Benefit/Special Payment and follow these same steps. If any of the benefits information needs to be changed, click Update this information beside the incorrect benefit to edit it.



6.4.2 Record a Termination

When an employee leaves the employment of the organization, the date of and reason for departure should be recorded in the employee's record. The employee will become an inactive (or "old") employee in the system, but the employee's data will still be available for historical reporting.

Under Position Information section click Record a Termination

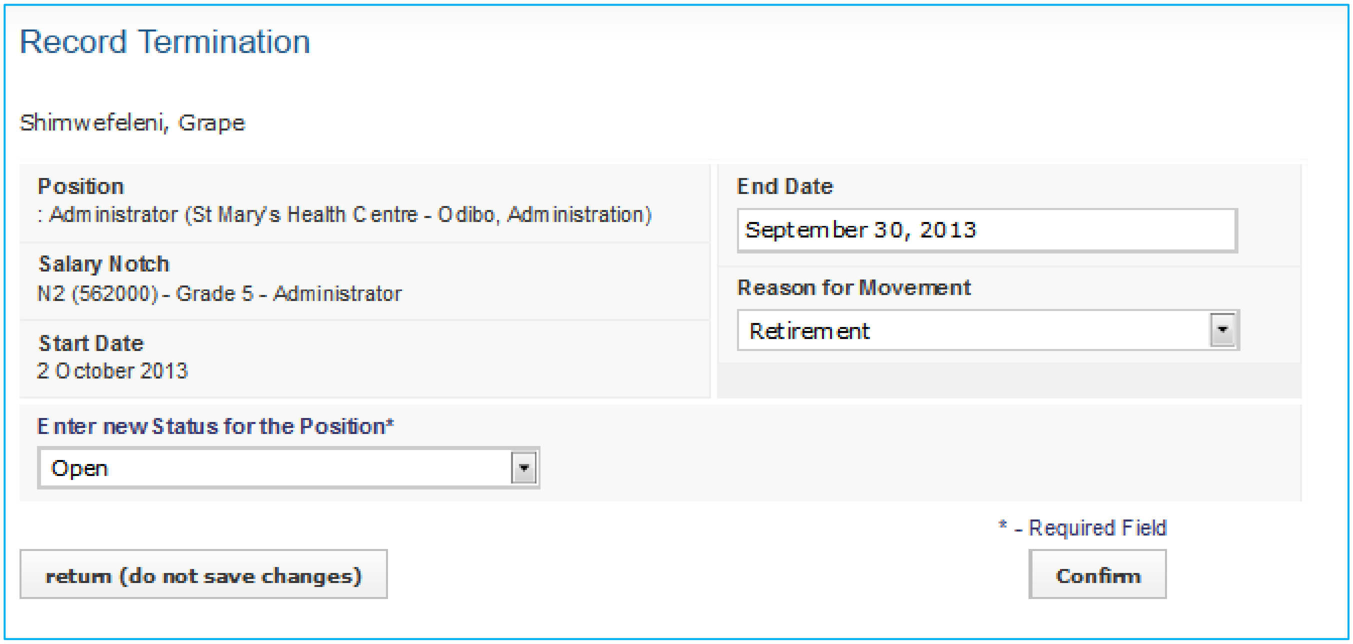


The Record a Termination form opens.

1. The **End Date** for employment is set to today's date by default. If that is not correct, change the date.

2. Select the **Reason for Termination**.

3. Select the New **Status for the position**: Open or Discontinued; if the position is marked "Open," it will be available for assignment to another employee or applicant.



Record Termination

Shimwefeleni, Grape

Position
: Administrator (St Mary's Health Centre - Odibo, Administration)

Salary Notch
N2 (562000) - Grade 5 - Administrator

Start Date
2 October 2013

End Date
September 30, 2013

Reason for Movement
Retirement

Enter new Status for the Position*
Open

* - Required Field

return (do not save changes)

Confirm

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

Record Termination

Shimwefeleni, Grape

Position
: Administrator (St Mary's Health Centre - Odibo, Administration)

Salary Notch
N2 (562000) - Grade 5 - Administrator

Start Date
2 October 2013

End Date
18 April 2014

Reason for Movement
Retirement

Enter new Status for the Position
Open

Edit

Save

The information that you just entered displays in the employee's record under the "Position Information" section.

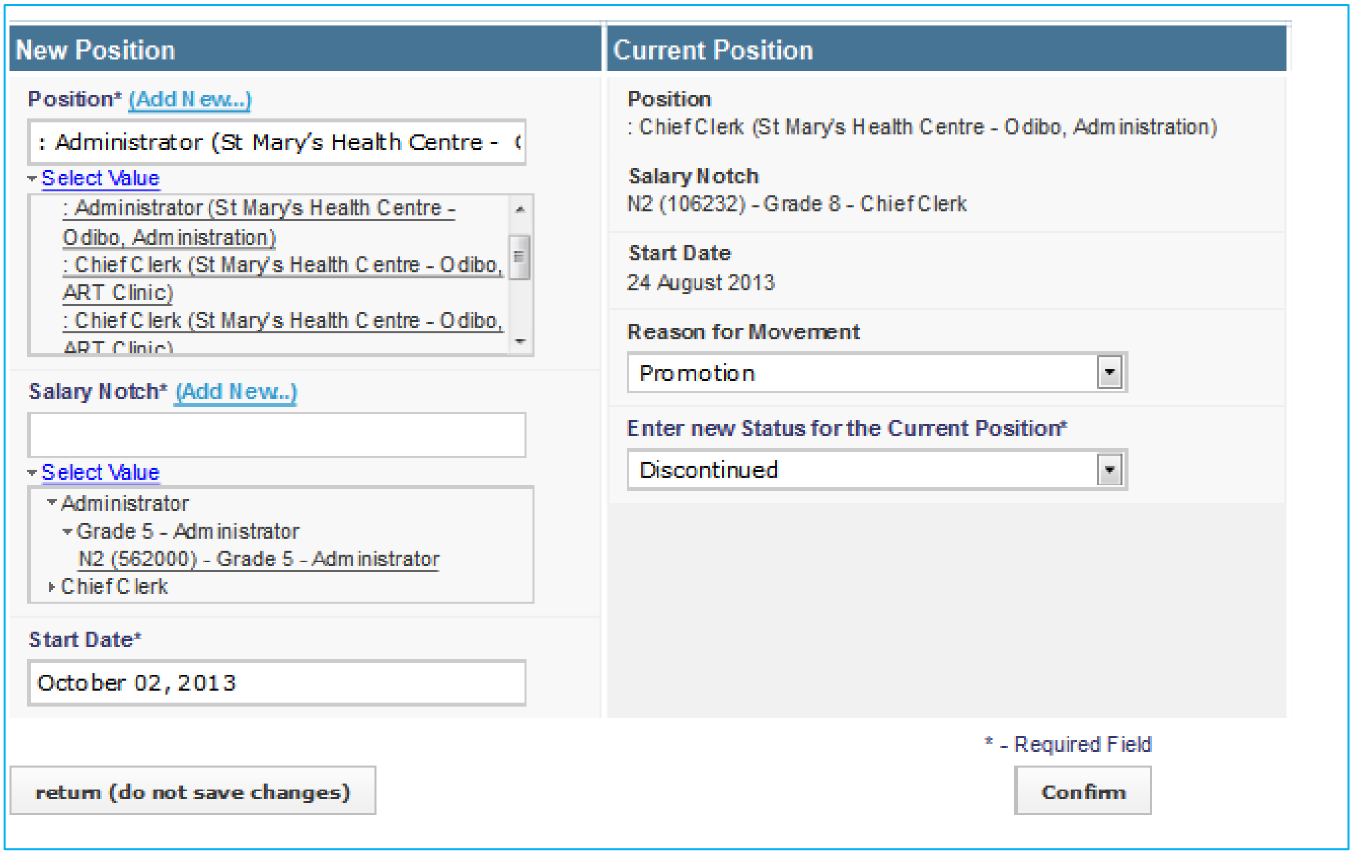
6.4.3 Record a Position Change

When an employee changes from one position to another in the organization, the position change should be recorded in the employee's record. All of the positions that the employee has held in the organization are saved to the employee's Position History, which can be reviewed at any time.

Under the position Information, click Change Position.

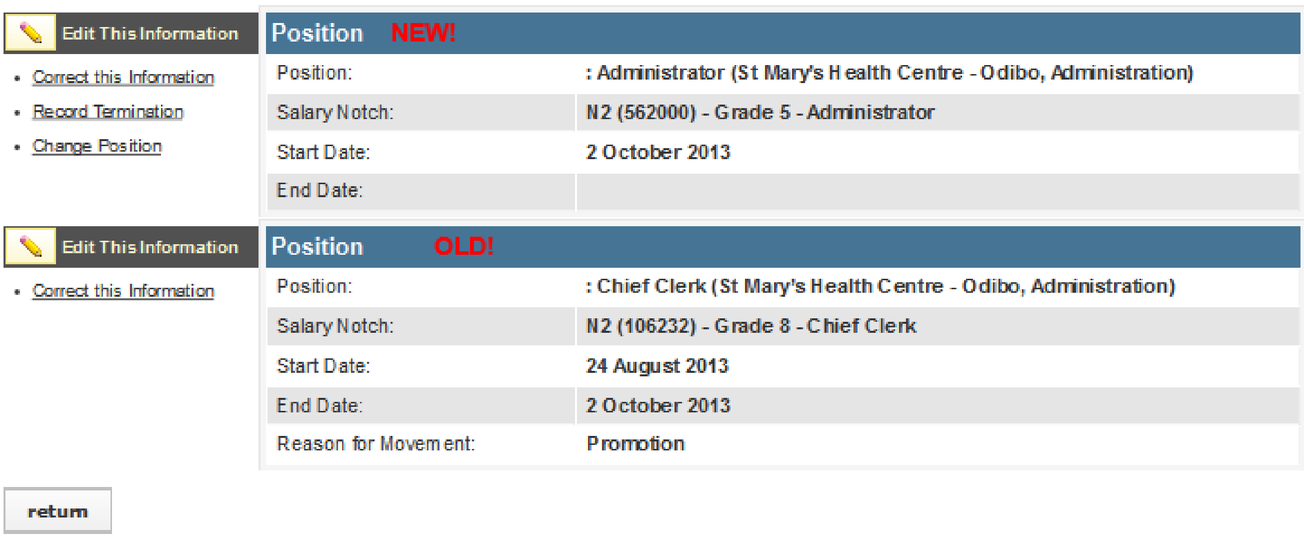
The Make a Job Offer form opens, showing the current position title and start date.

1. Either type or select the **position code** and **title** of the new Position.
2. The **Start Date** for the new position is set to today's date by default. If this is not correct, change it. This will also be the end date for the employee's old position.
3. Select the Currency and **enter the amount** of the Salary for the new position; this may be the same as the employee's previous salary.
4. Under **Reason for Termination**, select the reason for the position change.
5. Select the **New Status** for the position: Open or Discontinued; if the position is marked "Open," it will be available for assignment to another employee or applicant.



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

The information that you just entered displays in the employee's record under the "Position Information" section.



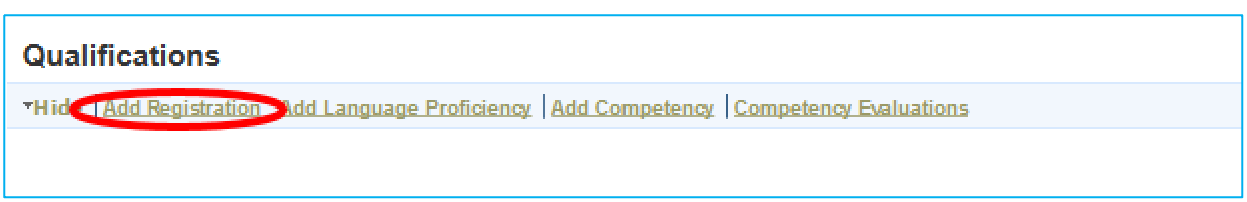
Click View Position History under the "Position Information" section to view a list of all the positions that the employee has held in the organization, their start dates and end dates, and the reasons why the employee left each position.

6.5 Professional and registration information

6.5.1 Add Registration

Many health workers are required to be registered or licensing by a professional licensing board or registration council. Track your employees' registrations or licenses by adding a registration to employees' records.

In the employee's record, click Qualifications in the side menu to jump to the "Qualifications" section of the record. Click Add Registration.

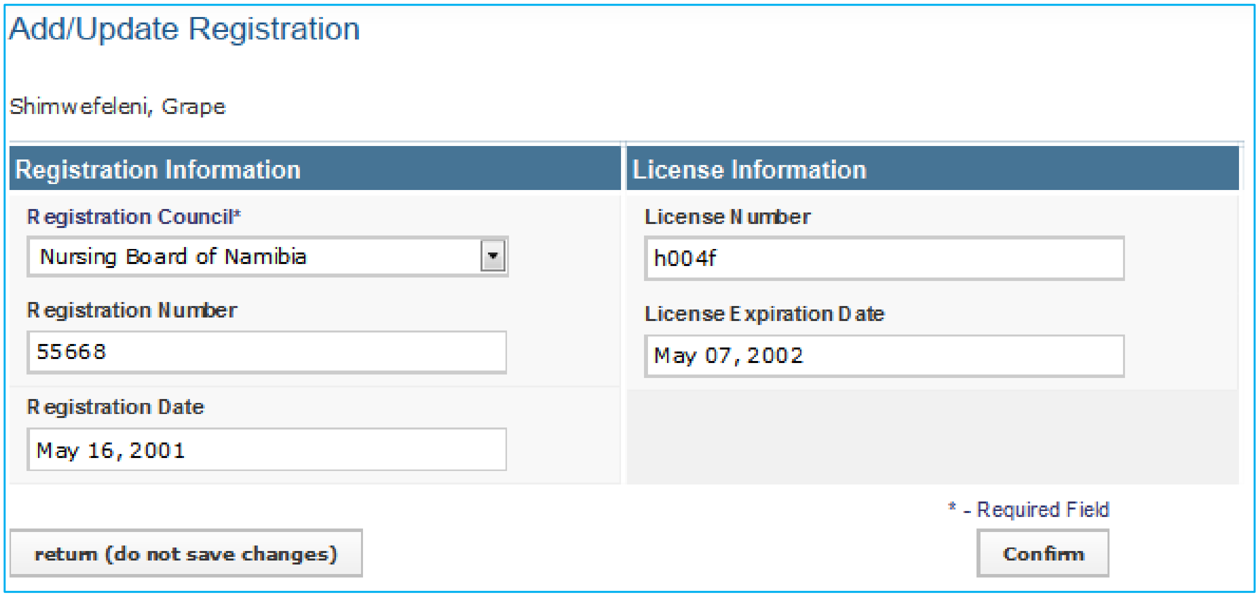


<u>The Registration form opens.</u>

1. Select the Registration Council that issued the license or registration.

2. Enter the Registration Number or License Number.

3. For a registration, select the Registration Date. For a license, enter the License Expiration Date.


Add/Update Registration

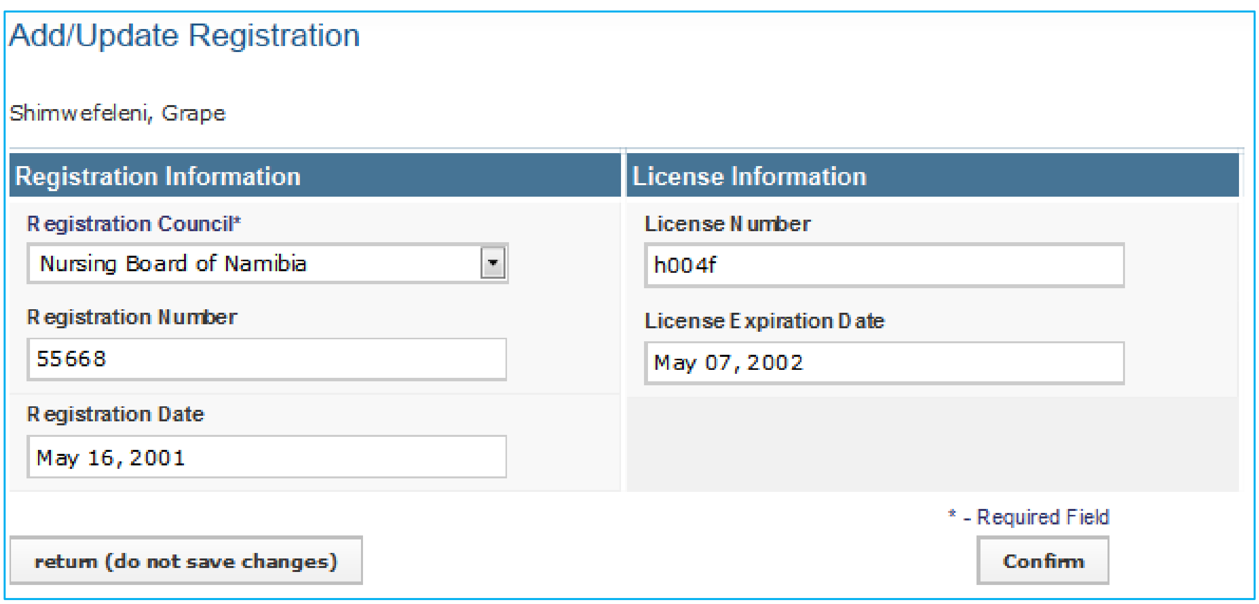
Shimwefeleni, Grape

Registration Information	License Information
Registration Council*	License Number
Nursing Board of Namibia	h004f
Registration Number	License Expiration Date
55668	May 07, 2002
Registration Date	
May 16, 2001	

* - Required Field

return (do not save changes) Confirm

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


Add/Update Registration

Shimwefeleni, Grape

Registration Information	License Information
Registration Council*	License Number
Nursing Board of Namibia	h004f
Registration Number	License Expiration Date
55668	May 07, 2002
Registration Date	
May 16, 2001	

* - Required Field

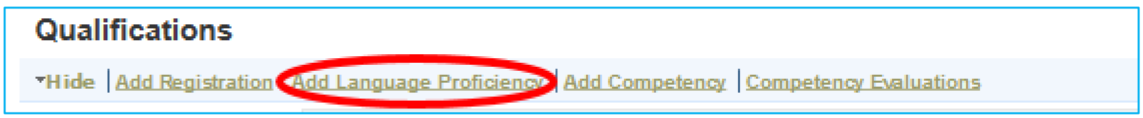
return (do not save changes) Confirm

The registration or license information appears on the employee's record under the "Qualifications" section. Repeat these steps for each registration or license that the health worker holds.

6.5.2 Add Language Proficiency

To track employees' and applicants' foreign language skills, add language proficiencies to a employee's record. Proficiency level in speaking, reading and writing each language can be recorded separately.

In the employee's record, click Qualifications in the side menu to jump to the "Qualifications" section of the record. Click Add Language Proficiency.



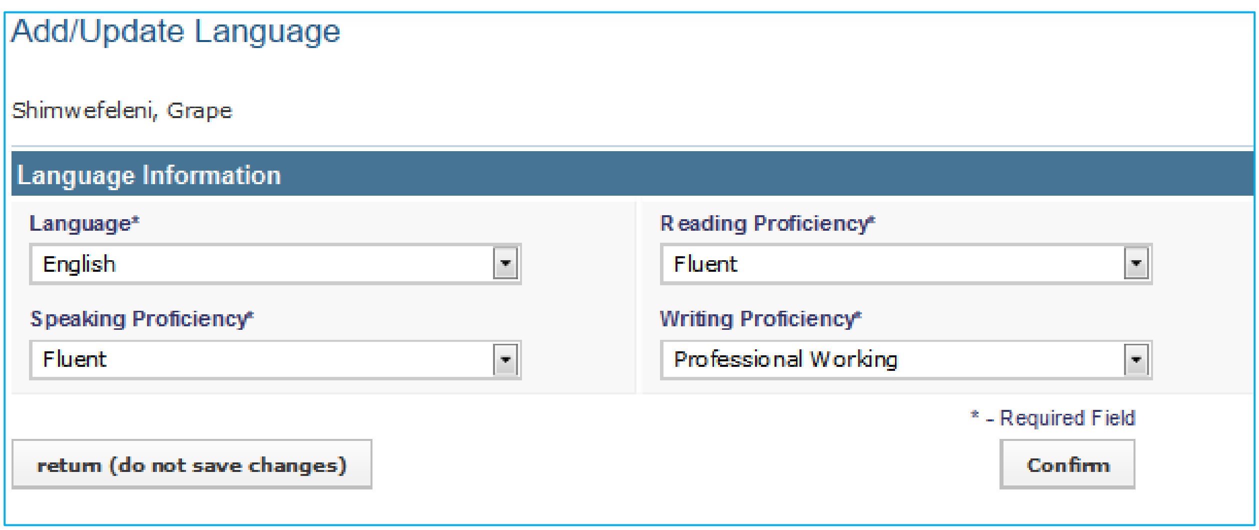
<u>**The Language form opens.**</u>

1. Select the **Language** to add.

2. Select the employee's **Speaking Proficiency** in that language: Elementary, Limited Working, Professional Working, Full Professional or Fluent.

3. Select the employee's **Reading Proficiency** in that language.

4. Select the employee's **Writing Proficiency** in that language.



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

The language information appears on the employee's record under the "Qualifications" section. Repeat these steps for each language in which the employee is proficient. If any of the language information needs to be changed, click Update this information beside the language proficiency to edit it.

6.5.3 Add a Competency

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

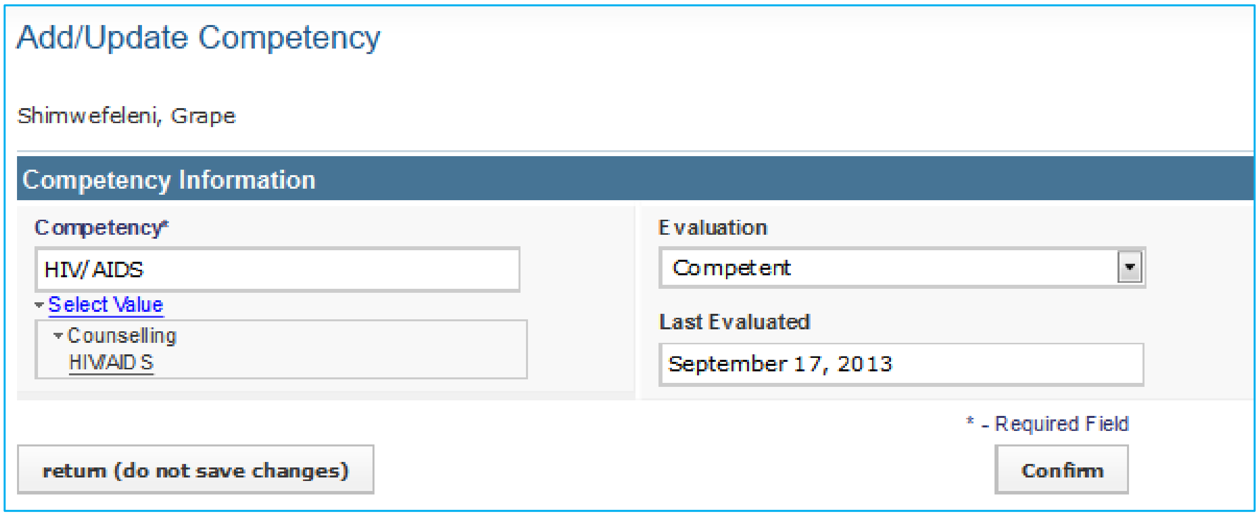
In the employee's record, click Qualifications in the side menu to jump to the "Qualifications" section of the record. Click Add Competency.

<u>The Competency form opens.</u>

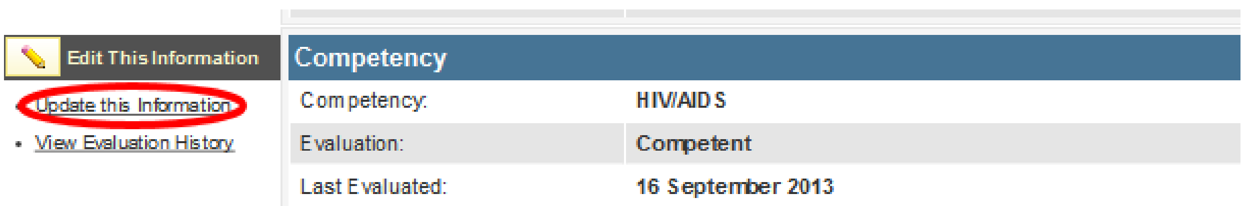
1. Under Competency select or type the **competency type** and then the **competency** to add.

2. If the employee has been evaluated for the competency, select the **Evaluation** result (optional).

3. Select the date the employee was **Last Evaluated** (optional).



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

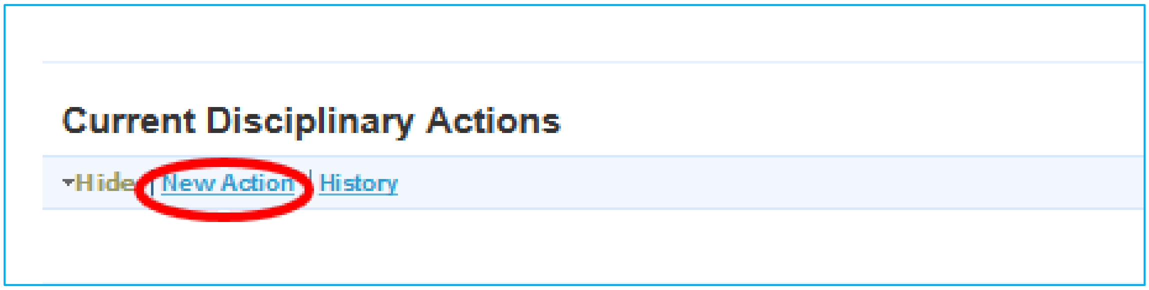


The competency appears on the employee's record under the "Qualifications" section. Repeat these steps for each competency that the employee has. Update an evaluation by clicking Update This Information beside the competency's name.

After adding the competency, you can review the evaluation history of a single competency by clicking View Evaluation History beside the competency's name, or view all competency evaluations for the employee by clicking Competency Evaluations at the top of the "Qualifications" section.

6.6 Disciplinary Actions information

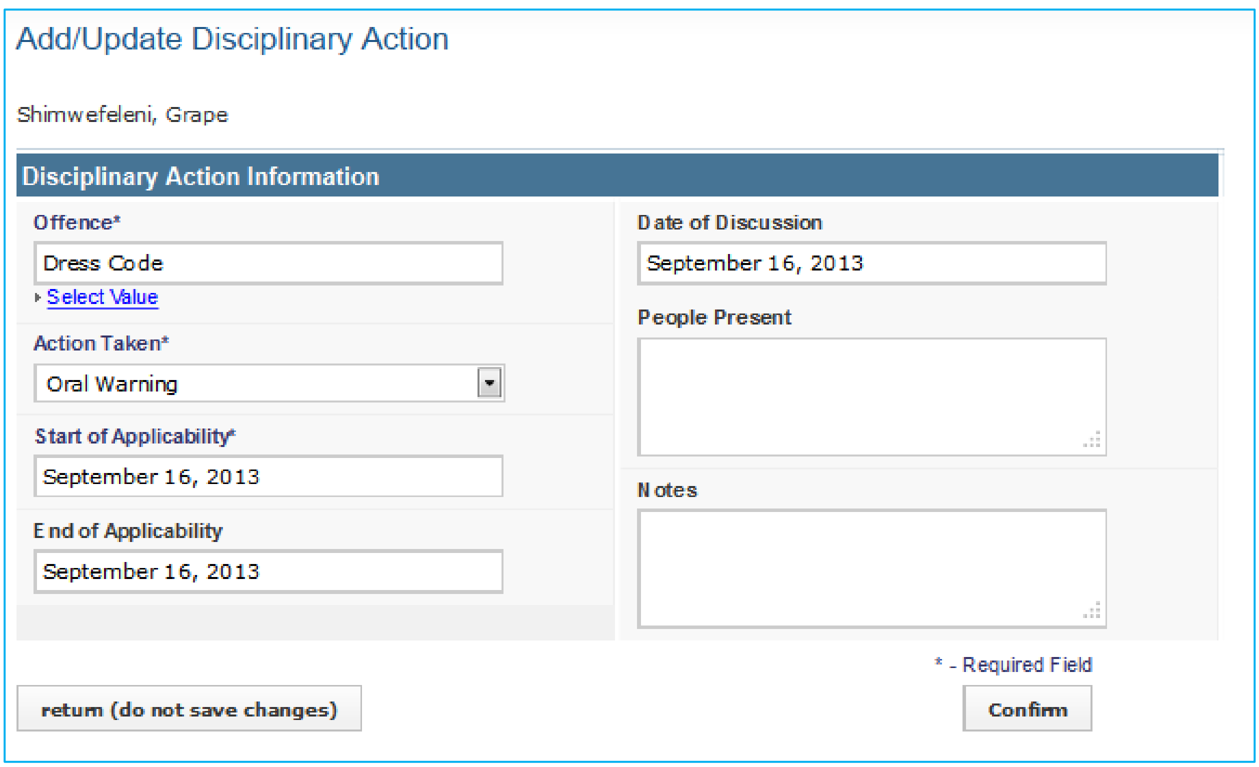
In the employee's record under "Current Disciplinary Actions," click **New Action**.



To view a record of all disciplinary actions, click **History**. If any of the disciplinary action information needs to be changed,

The Add/Update Disciplinary Action form opens.

1. From the drop down menu, select **offence**.
2. From the drop down menu, **Action Taken**.
3. Select **the Date of Discussion**, **Start of Applicability** and **End of Applicability**, using the date pickers.



4. Use the text boxes to record **People Present** and any **Notes**. Click Confirm and confirm that the information entered is correct.

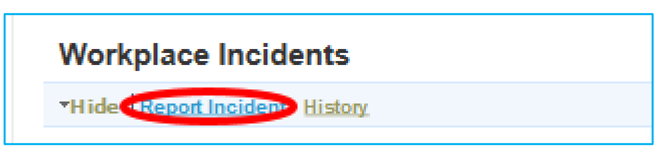
5. If it is not correct, click Edit to change it. If it is, click Save to save it.

NB: The disciplinary action information that you just entered displays in the employee's record. Additional disciplinary actions can now be added. For each disciplinary action, click New Action

6. Click Correct this information beside the incorrect information to edit it.

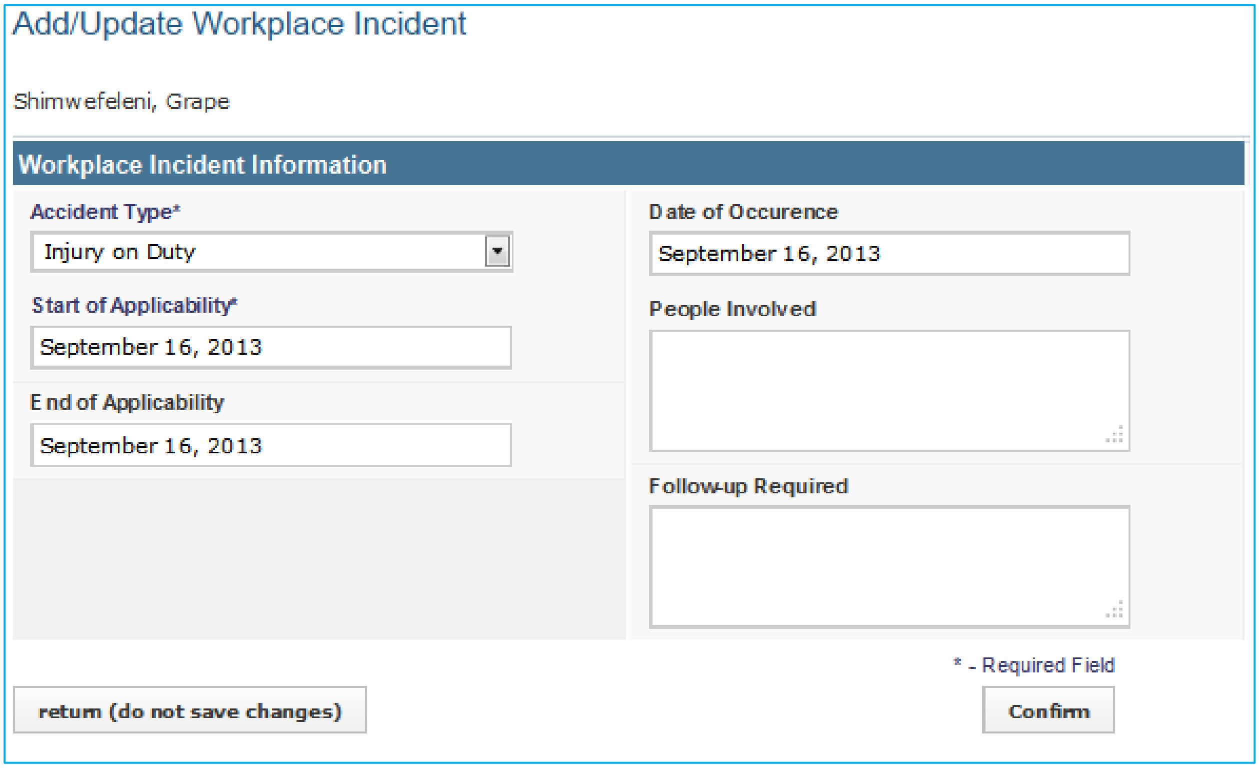
6.7 Workplace Incidents

In the person's record under "Current Disciplinary Actions," click Report Action.

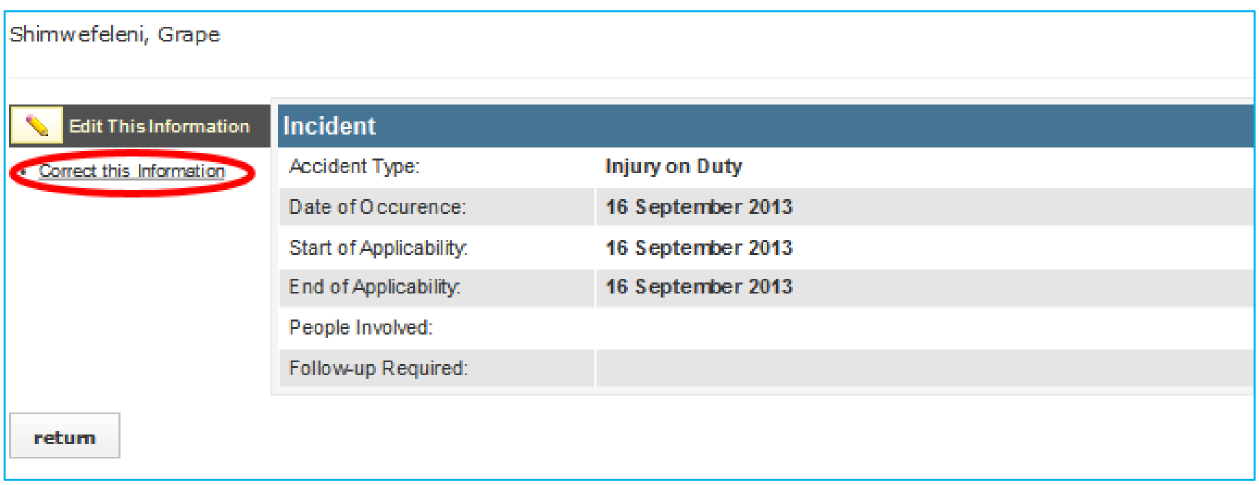


<u>The Add/Update Workplace Incidents form opens.</u>

1. From the drop down menu, select the **Accident Type**.
2. Select the **Date of Discussion** and **Start of Applicability**, using the date pickers.
3. Use the text boxes to record People involved and follow-up required



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

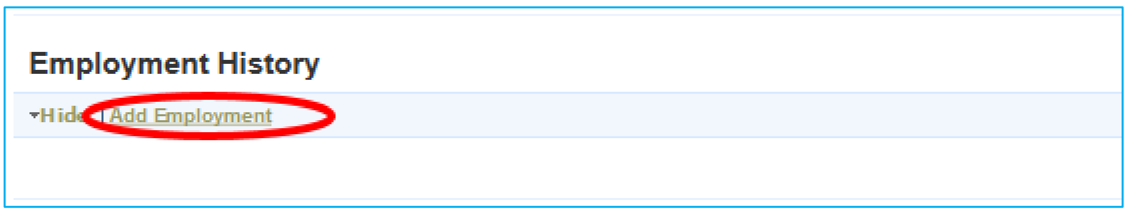


The disciplinary action information that you just entered displays in the employee's record. Additional disciplinary actions can now be added. For each disciplinary action, click New Action. To view a record of all disciplinary actions, click History. If any of the disciplinary action information needs to be changed, click Correct this information beside the incorrect information to edit it

6.8 Employment History

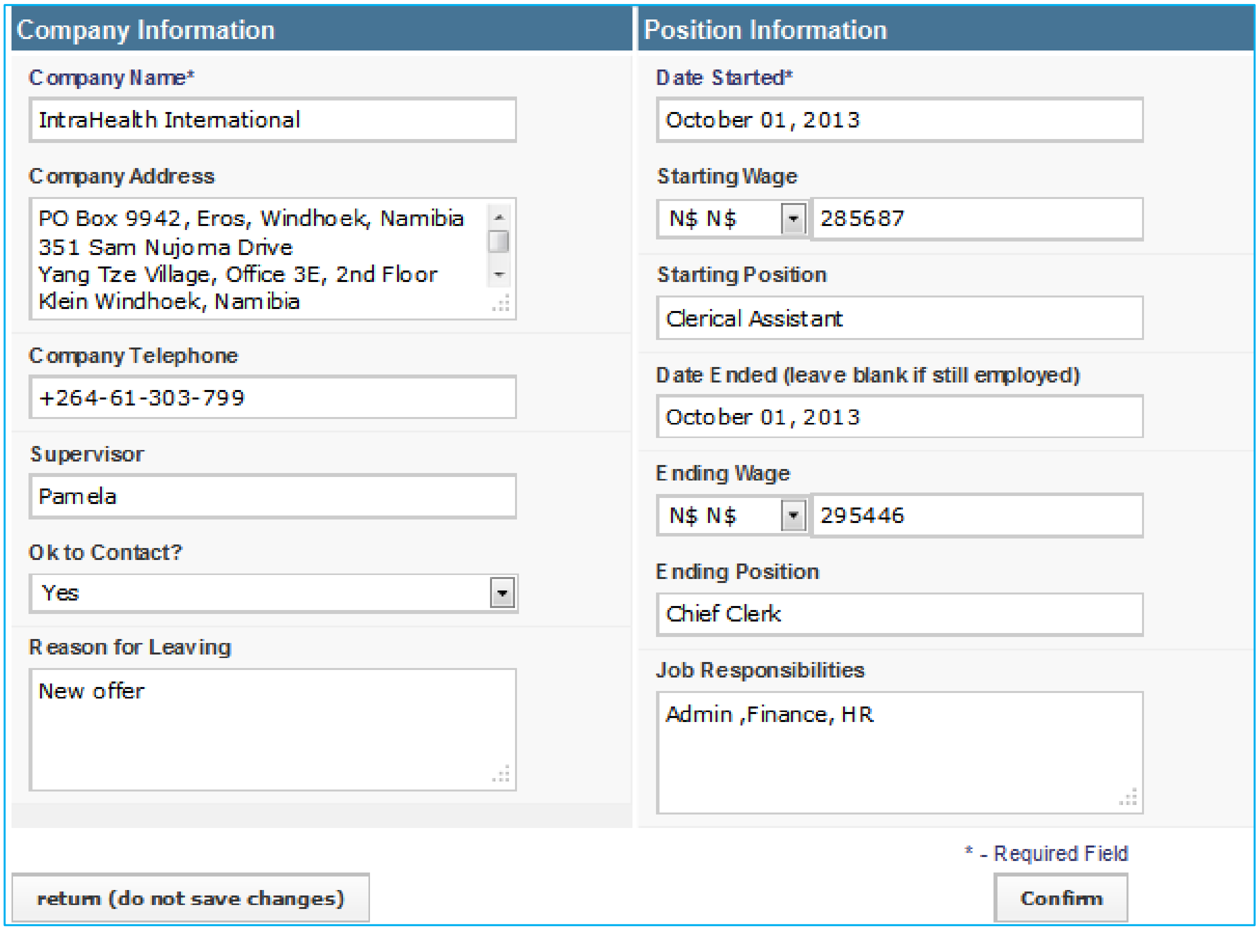
As part of completing the job application, the applicant's employment history should be recorded. The employment history can also be added to the record of any employee of the organization.

In the person's record, click Employment History in the left menu to jump to the "Employment History" section. Click Add Employment.



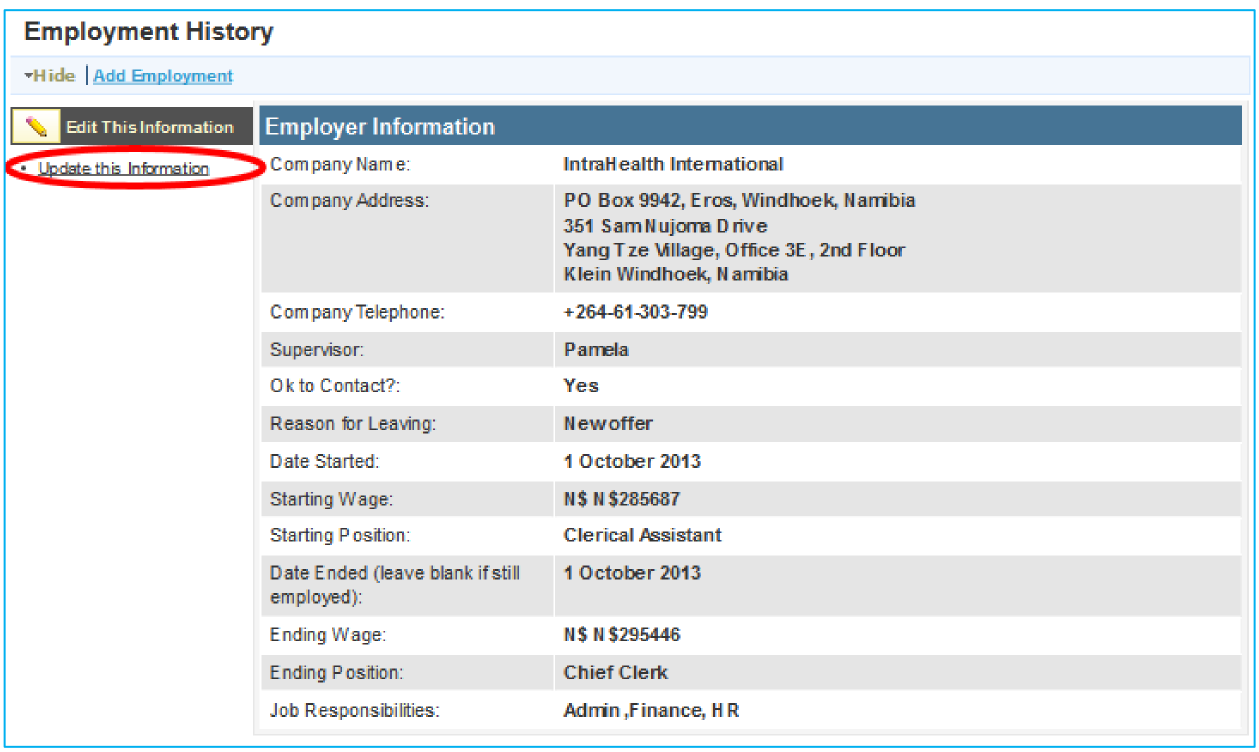
<u>The Employment History form opens.</u>

1. In the "Company Information" section, enter the **Company Name** where the person previously worked.
2. Enter the **Company Address** (optional).
3. Enter the **Company Telephone** (optional).
4. Enter the name of the applicant's **Supervisor** (optional).
5. Under OK to Contact? Select **Yes** or **No** for whether it is OK to contact the applicant's former employer.
6. Enter the **Reason for leaving** the former employer (optional).
7. In the "Position Information" section, enter the **Date Started** at that employer.
8. Select the Currency for and enter the amount of the **Starting Wage** (optional).
9. Enter the title of the **Starting Position** (optional).
10. Enter the **Date Ended**; leave this field blank of the applicant is presently employed by the company.
11. Select the Currency for and enter the amount of the **Ending Wage** (optional).
12. Enter the title of the **Ending Position** at the company (optional).
13. Enter the **Job Responsibilities** (optional).



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

15. If it is not correct, click Edit to change it. If it is, click Save to save it.



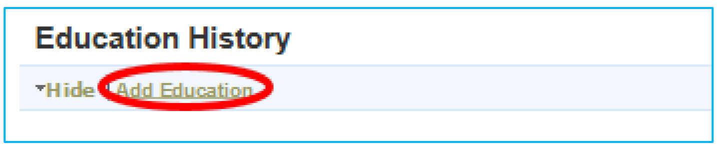
The past employment displays in the person's record under the "Employment History" section. Click Update This Information beside the employer to edit any of the fields, if necessary.

<u>**NB**: Repeat this process for each former employer.</u>

6.9 Education History

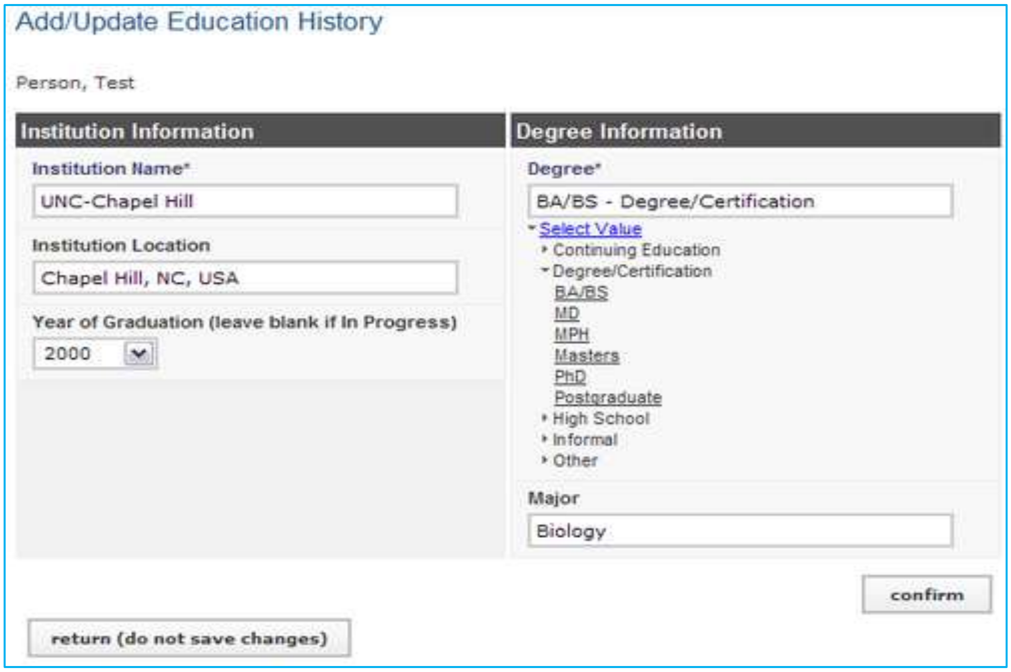
As part of completing the job application, the applicant's education history should be recorded. The education history can also be added to the record of any employee of the organization.

In the person's record, click Education History in the left menu to jump to the "Education History" section. Click Add Education.

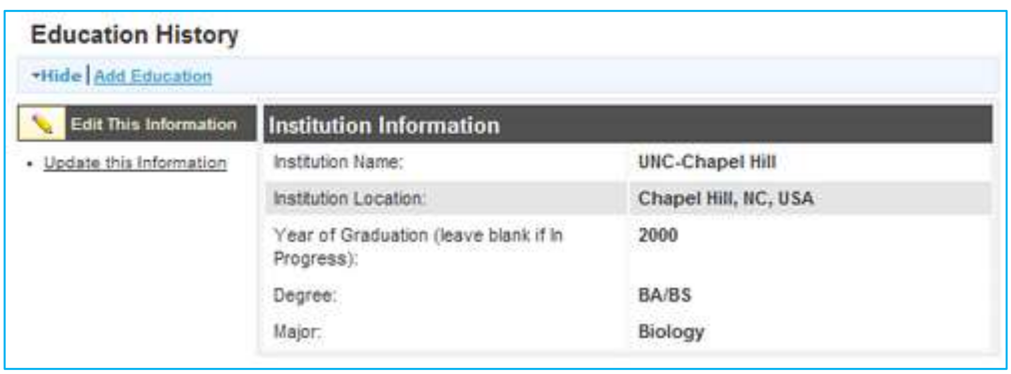


<u>**The Education History form opens.**</u>

1. Enter the **Institution Name**.
2. Enter the **Institution Location** (optional).
3. Select the **Year of Graduation**; leave this option blank if education is still in process.
4. Type or select the **Qualification Name** earned.
5. Enter the **Major** (optional).



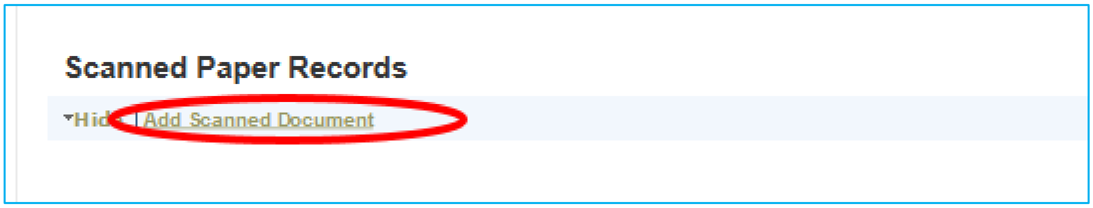
6. Click Confirm and confirm that the information entered is correct



7. If it is not correct, click Edit to change it. If it is, click Save to save it.

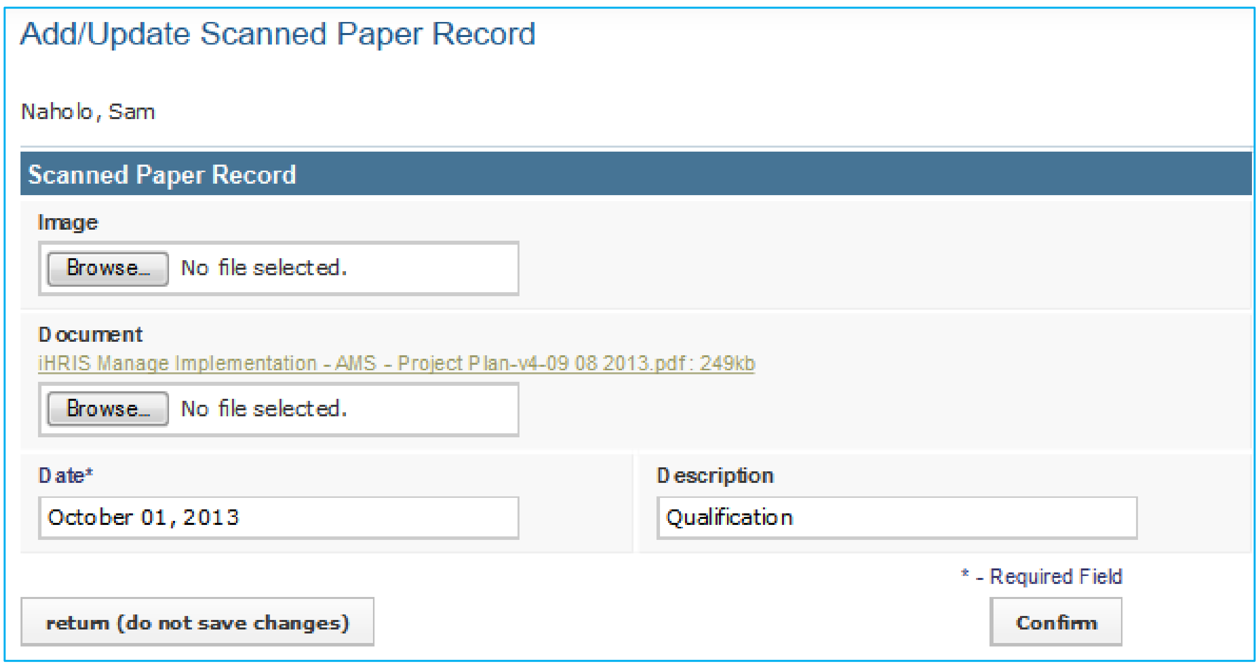
6.10 Scanned Paper Records

In the Employee's record under 'Scanned Paper Records", Click on Add Scanned Paper Records

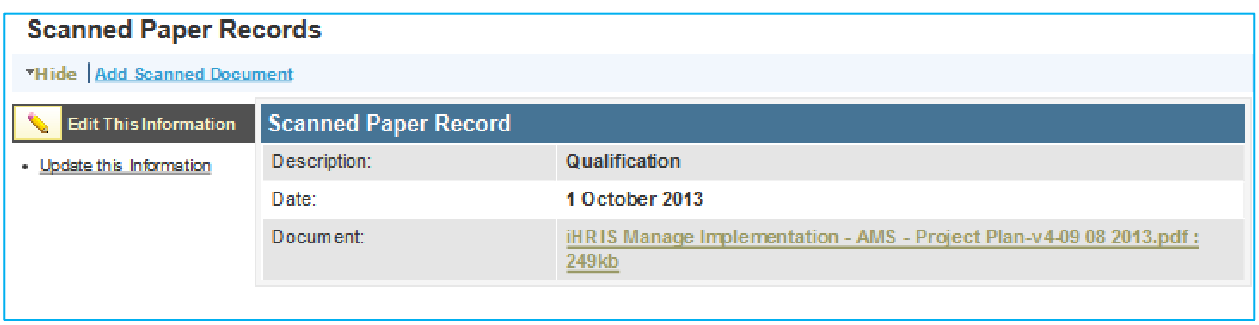


The Add/Update Scanned Paper Records form opens.

1. Browse **Image** for the document (Optional).
2. Browse the **Document** (ID ,qualification)
3. Enter the Date
4. Enter **Description** of uploaded document

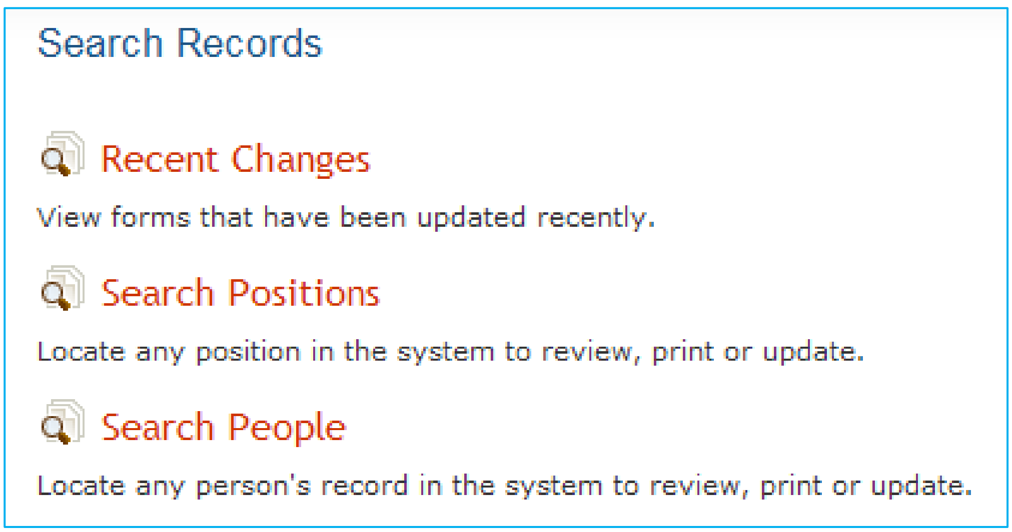


5. Click Confirm and confirm that the information entered is correct



6. If it is not correct, click Edit to change it. If it is, click Save to save it. Repeat this process for each document to be uploaded.
7. The past employment displays in the person's record under the “Scanned Paper Records " section. Click Update this information.

7 SEARCH

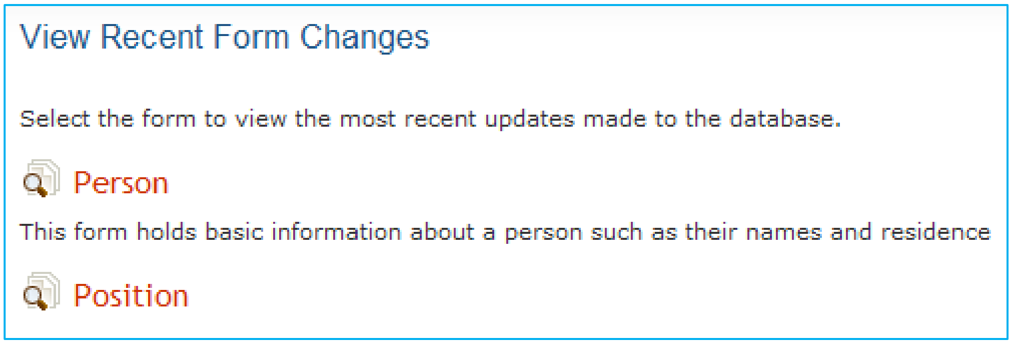


7.1 Recent Changes

Locate a recent change made to a form or record, including recently added records. These changes may not show up in other reports or searches for 20 minutes (after change made).

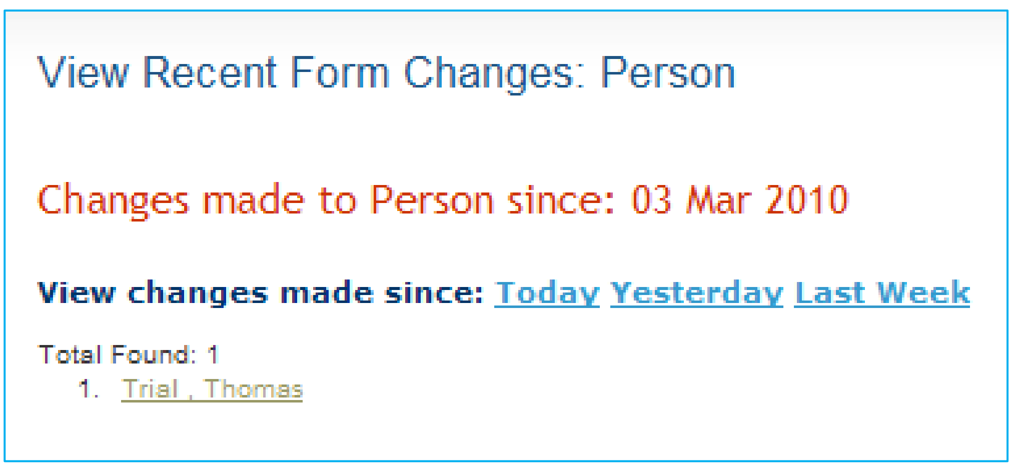
From the Home page or left menu, click Search Records. On the Search Records page, click Recent Changes.

The Search form opens. Select to view recent changes to Person or Position. If an option is not selected, all records will be searched.



Click the View button to show all matching results.

A list of matching records with changes made **today** will be displayed. You can also choose to review changes made **Yesterday** or **Last Week**. Click on the record you want to review.



7.2 Search Position

Position, as an instance of a job/, reflects the number of staff that can be employed per job e.g. if the job is Medical Superintendent, the approved number of people that can be employed is 1, so there will only be one position for that job.

NB: To avoid duplication you need to determine if the position already exists by using the search functionality in the system. If the position was previously occupied, you will not need to create a new position and you can proceed to the next step. To see if the position already exists, click on <Search Records>.

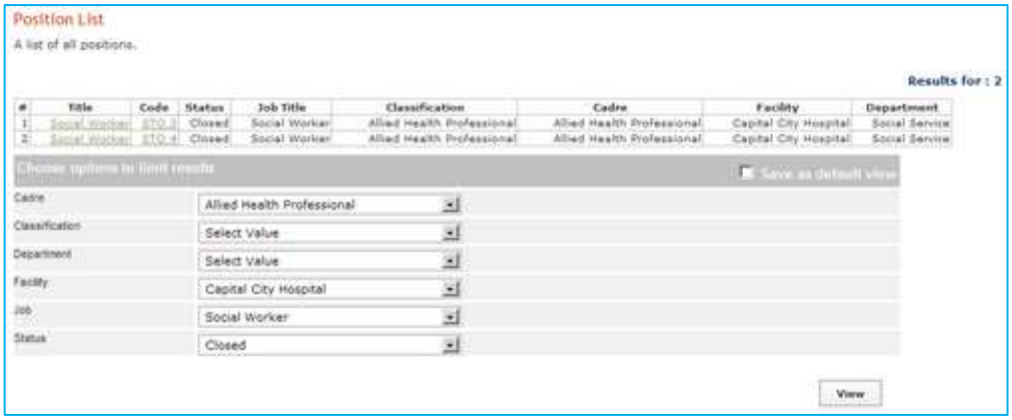


Figure 24: Search Records

All jobs have been added as part of Master Data; so you can click on the drop-down menu for Job and select the job for which you want to search an existing position, select it and click on <**Search**>.

In the event of an existing position being found, an error message will be displayed above indicating that a position has already been created for the "**Medical Superintendent**" job. When there is no error, we will proceed with creating the position. To do this, click on <Configure System> and then select <Administer Database> and then <Positions (by Facility)> since we are familiar with the staff list and the facility where the person is working, it is the quickest way to add a position.

7.3 Search people

We now need to allocate the position we created, to the staff member we captured. We do this by clicking on **<Search Records>** and then on **<Search People>** and entering the staff member's surname as shown below and clicking on **<View >**.

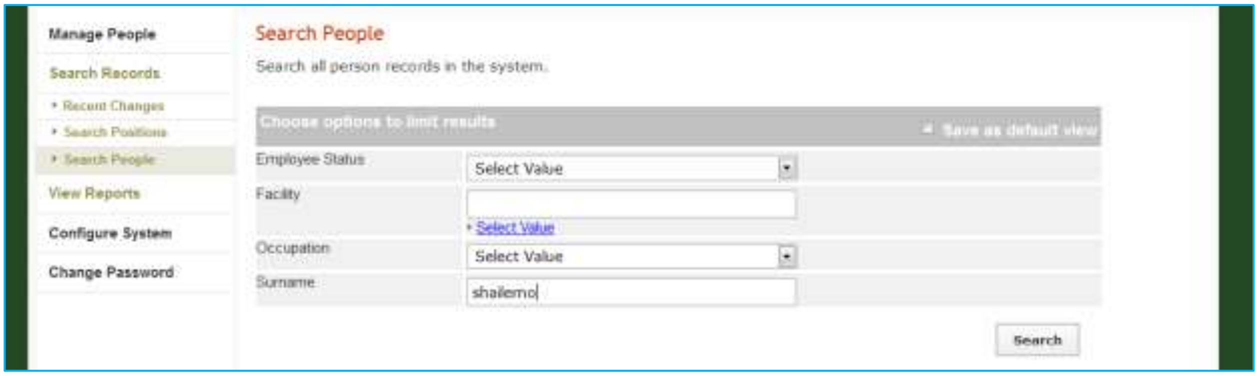
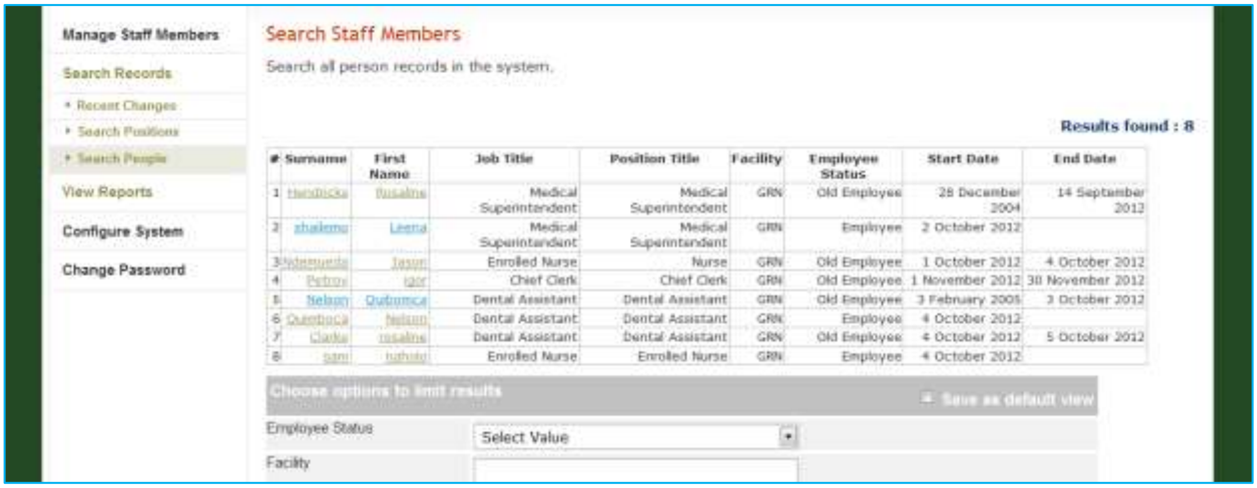
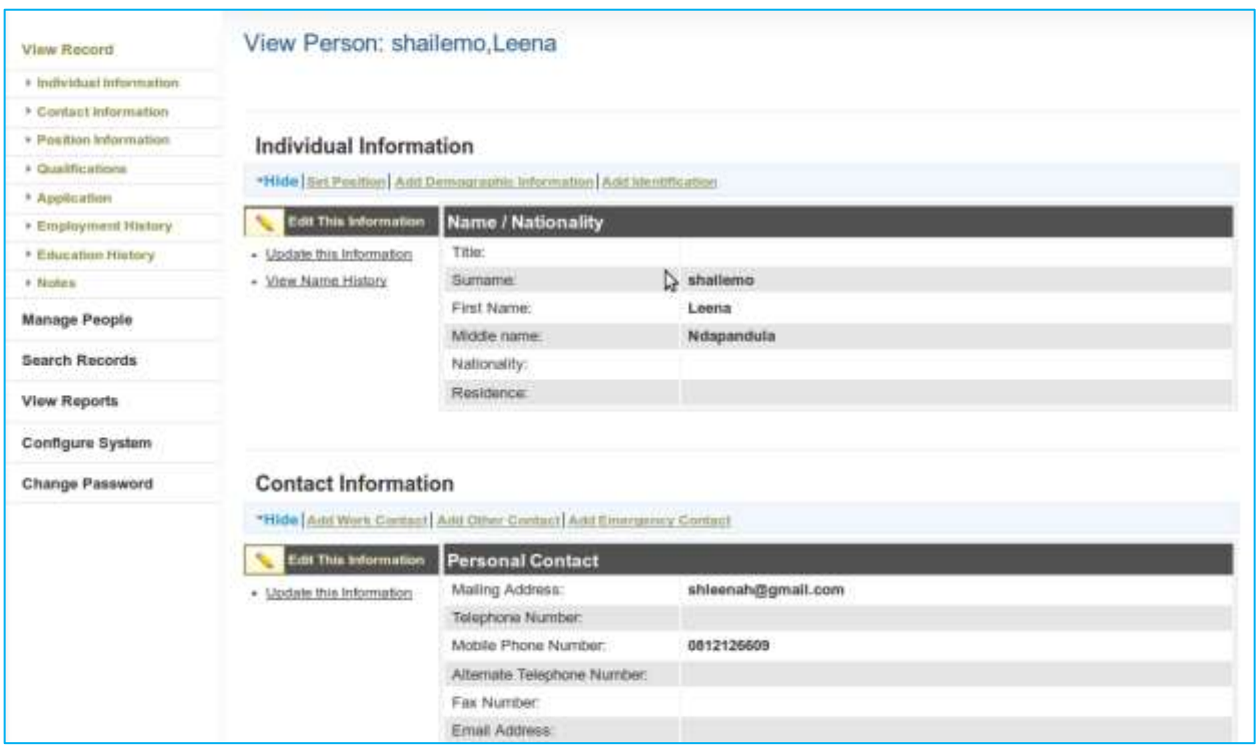


Figure 25: Search for staff member

- In the Employee Status menu, select the type of record to search for: Applicant, Employee, Old Employee or Old Applicant. Leave blank to search all employees.
- Limit the search to a particular facility by selecting that facility name from the Facility menu. Leave blank to search all facilities.
- Limit the search to a particular job by selecting that job title from the Job menu. Leave blank to search all jobs.
- Enter the person's Surname to find a single record or leave blank to find multiple records.



A list of matching records displays. Click the name of the person whose record you want to review. To search again, select new options from the Search form and click View.



8 REPORTS

To access any report of interest, click **View Reports.** A list of reports will appear.

8.1 Summary Reports

- Budget Summary Report -- This report gives a budget summary for all departments. It will list total salary expenditures per department.
- Age Distribution -- This report provides the age distribution of staff.
- Classification Breakdown -- this report returns the number of jobs per job classification. Jobs must be linked to a classification **(Section** Error! Bookmark not defined.**)** before this report can be used.
- Hires per Year -- This report returns the number of vacancies that were filled in a particular year.
- Job Breakdown -- This report returns a count per job. Further options can be selected e.g. to return the count per job for only a specific facility or department, etc.
- Nationality Breakdown This report returns a count per Nationality. Further options can be selected e.g. to return the count per nationality for only a specific facility or department, etc.
- Retirement Planning -- This report will return the total number of staff due for retirement based on the date of birth.
- Staff movement summary report -- Displays the number of movements per reason of movement

8.2 AMS staff reports

- Appointment Report
- Contract status list -- This report shows filled positions with contract details
- Detailed budget report -- Detailed budget report
- Disciplinary Action Report
- Leave Report
- Appointment and last movement date -- Displays appointment and last movement date per employee
- Current staff -- List of current staff

- Position History
- Qualification Information -- This report shows all the qualifications of employees, and the year obtained.
- Staff Retirement Date -- Staff retirement dates early retirement date is at the age of 55 and the normal retirement date is at the age of 60.
- Staff Movement Details -- Staff Movement Details
- Workplace Incident
- Salary Increment

8.3 Establishment

- Staff Establishment Report

8.4 Facility Report

These reports pertain only to offices or facilities entered in the system. They can be filtered by the facility type and by the country and district where the facility is located.

- Facility List -- A list of all facilities.

8.5 Affirmative Action Reports

- Namibian Affirmative Summary report -- Affirmative summary report for Namibian employees , limited by jobal class, Nationality,
- Affirmative Action -- All occupations and the gender of the staff member occupying it
- Non-Namibian Affirmative Summary -- Affirmative summary report for Non-Namibian employees , limited by occupational class, Non-Namibian Nationality & gender

8.6 Position Reports

These reports pertain only to positions entered in the system. They can be filtered by job, facility and department where the position is located, position status, cadre and job classification.

- Position List -- a list of all positions with their status i.e. open (vacant) or closed (filled)
- Position Open Duration -- The length in days each position was open before being filled.

8.7 Search

These reports enable users to search for specific employee's record by the employee's surname, status, job or facility where the employee is deployed. The same report can be accessed from the Search Records screen.

- Search Staff Members -- Search all person records in the system.
- Staff ID Number -- search staff by identification number

8.8 Staff Contact Details

- Emergency Contact List -- This report will only return emergency contact information if it has been added for staff.
- Home Contact List -- This report will return all staff home contacts information if it has been added.
- Salary List -- This report will return starting and current salary only if it has been added and kept updated for staff.
- Staff Directory -- This report will return a list of all staff with their work contact information. Below is a description of the process to export any reports.

Reports

- **AMS Staff Reports**
  - Appointment Report
  - Contract status list -- This report shows filled positions with contract details
  - Detailed budget report -- Detailed budget report
  - Disciplinary Action Report
  - Leave Report
  - Appointment and last movement date -- Displays appointment and last movement date per employee
  - Current staff -- List of current staff
  - Position History
  - Qualification Information -- This report shows all the qualifications of employees , and the year obtained.
  - Staff Retirement Date -- Staff retirement dates earlly retirement date is at the age of 55 and the normal retirement date is at the age of 60.
  - Staff Movement Details -- Staff Movement Details
  - Workplace Incident
  - Salary Increment
- **Establishment**
  - Stafff Establishment Report
- **Facility Report**
  - Facility List -- A list of all facilities.
- **Filled Positions**
  - Filled Positions Export -- A list of historical filled positions for exporting.
- **Namibia staff reports**
  - Length of Service in Current Position
  - Namibia Staff Language
- **Affirmative Action Reports**
  - Namibian Affirmative Summary report -- Affirmative summary report for Namibian employees , limited by occupational class, Nationality
  - Affirmative Action -- All occupations and the gender of the staff member occupying it
  - Non-Namibian Affirmative Summary -- Affirmative summary report for Non Namibia employees , limited by occupational class, Non-Namibian Nationality & gender
- **Position Reports**
  - Position List -- A list of all positions.
  - Position Open Duration -- The length in days each position was open before being filled.
- **Summary Reports**
  - Posts per cadre -- Number of posts per cadre
  - Post By Department and Cadre -- Number of positions per department per cadre
  - Staff movement summary report -- Displays the number of movements per reason of movement
- **Search**
  - Search People -- Search all person records in the system
  - Staff ID Number -- search staff by identification number
- **Staff Reports**
  - Age Distribution -- Total of all staff by age range.
  - Classification Breakdown -- A total of all staff by classification.
  - Hires per Year -- Hire totals by year.
  - Occupation Breakdown -- Total staff by occupation.
  - Nationality Breakdown -- A list of all staff by nationality.
  - Retirement Planning -- Staff totals by retirement year.
  - Emergency Contact List -- List of all staff with emergency contact details.
  - Home Contact List -- All staff with home contact details.
  - Salary List -- A list of all employees with salary details.
  - Staff Directory -- A list of all current staff with work contact information.

Figure 26: Reports

Click the desired tabular report e.g. **Staff Directory** (Staff List).

There are two types of reports i.e.

- Table format
- Graphical and

8.9 Tabular report formats

Figure 27: Tabular report

To create a pdf file of the above report, click the ***Print*** *button*

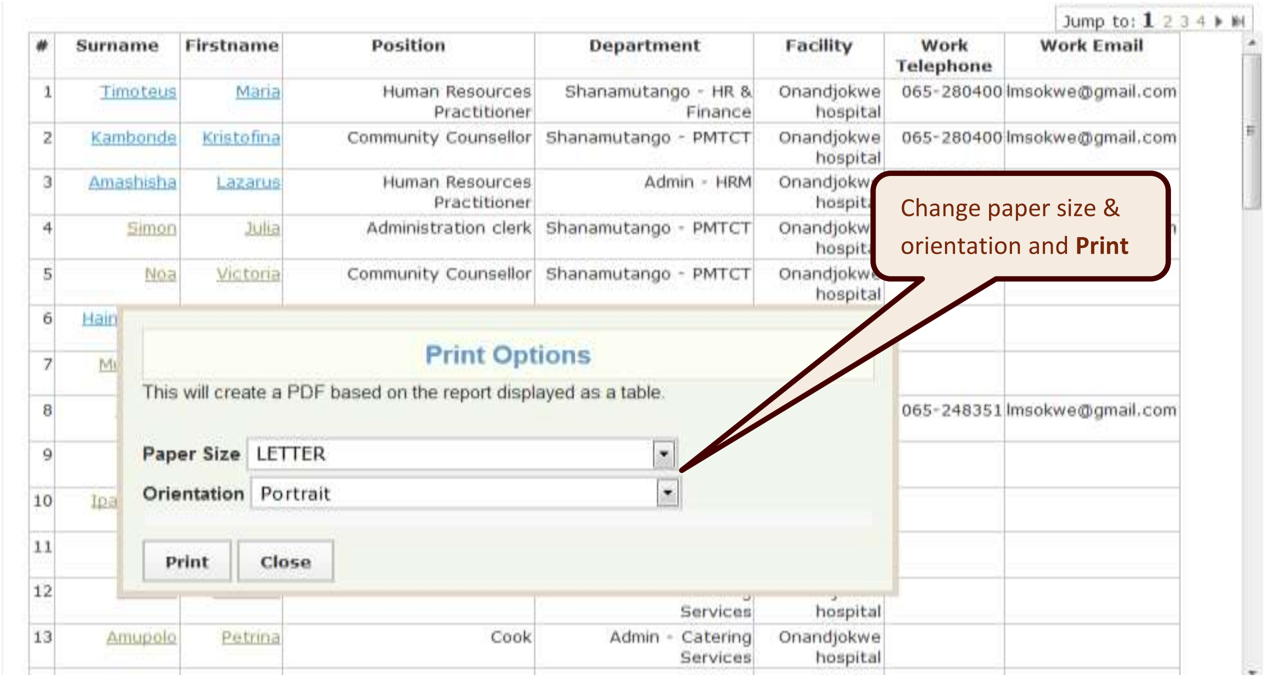


Figure 28: Report printing option

To create an Excel file of the above report, click the ***Export*** *button*

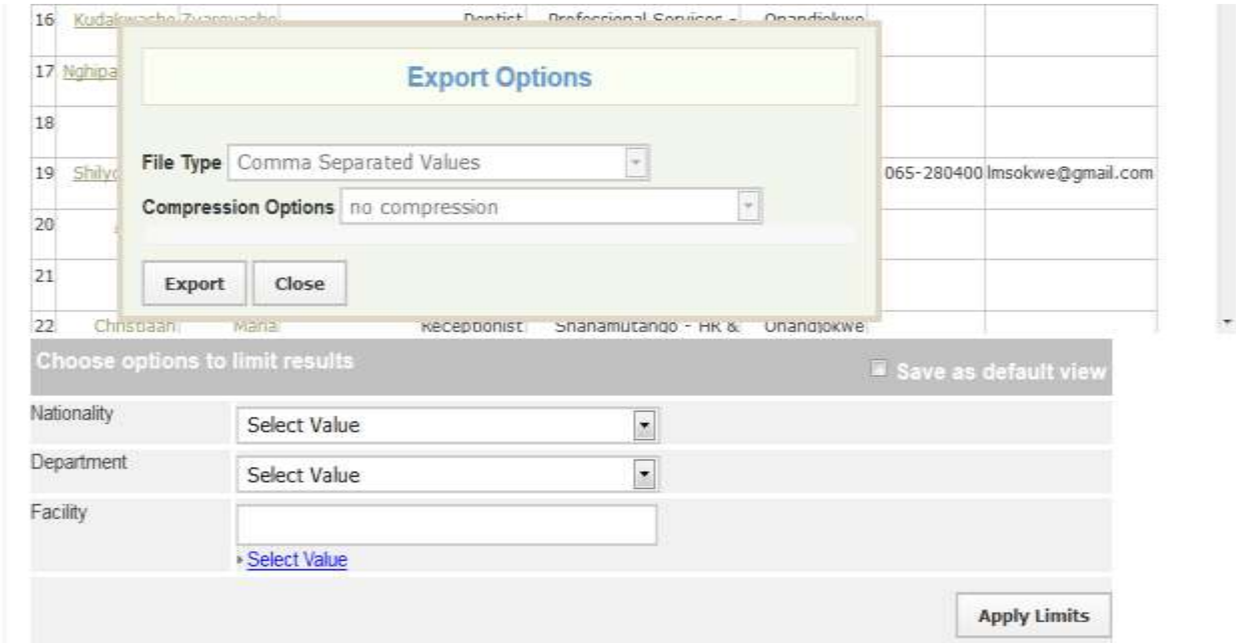


Figure 29: exporting Report

Click the **Export** button again

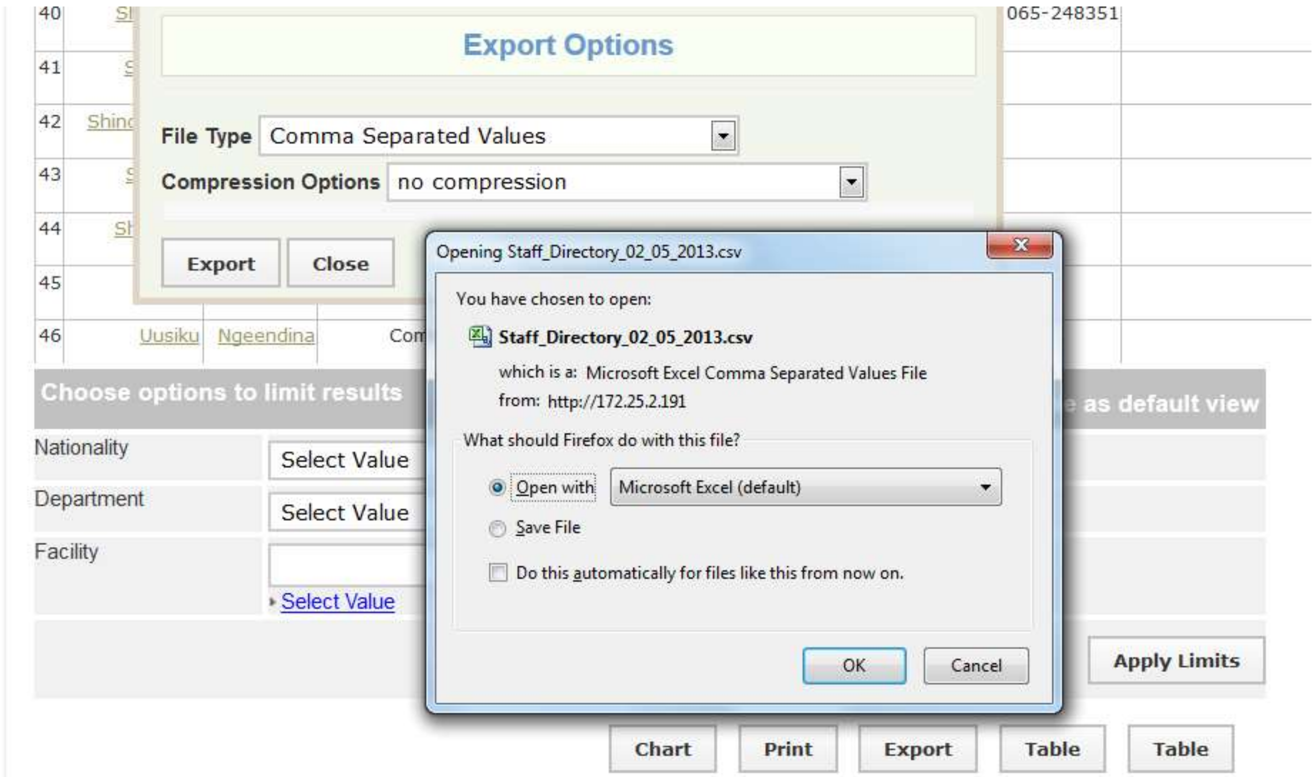


Figure 30: Opening report in excel

To view the report without saving, choose **Open With**. Select **Save File** to save the report.

Note: This file opens or saves as * **.CSV**. To change the file format, Go to **File menu**, select **Save As,** type file name, under **save as type** choose **Excel 97-2003 workbook** from the drop down menu.

8.10 Graphical Report Formats

Follow the above steps as used to display the tabular report format to get graphical report be clicking **Chart** button

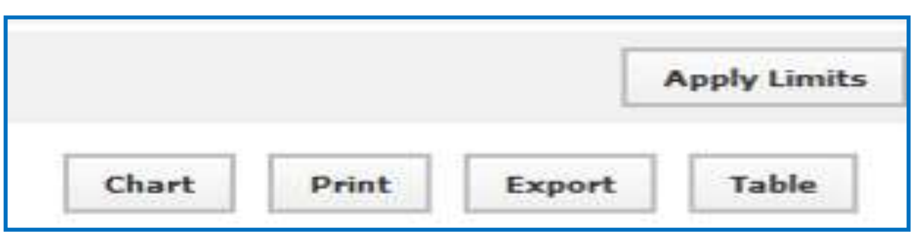


Figure 31: Graphical report

Click the Chart Button to display summary information in chart format.

Note: This button is only applicable to reports with not more than two fields where one field is numeric.

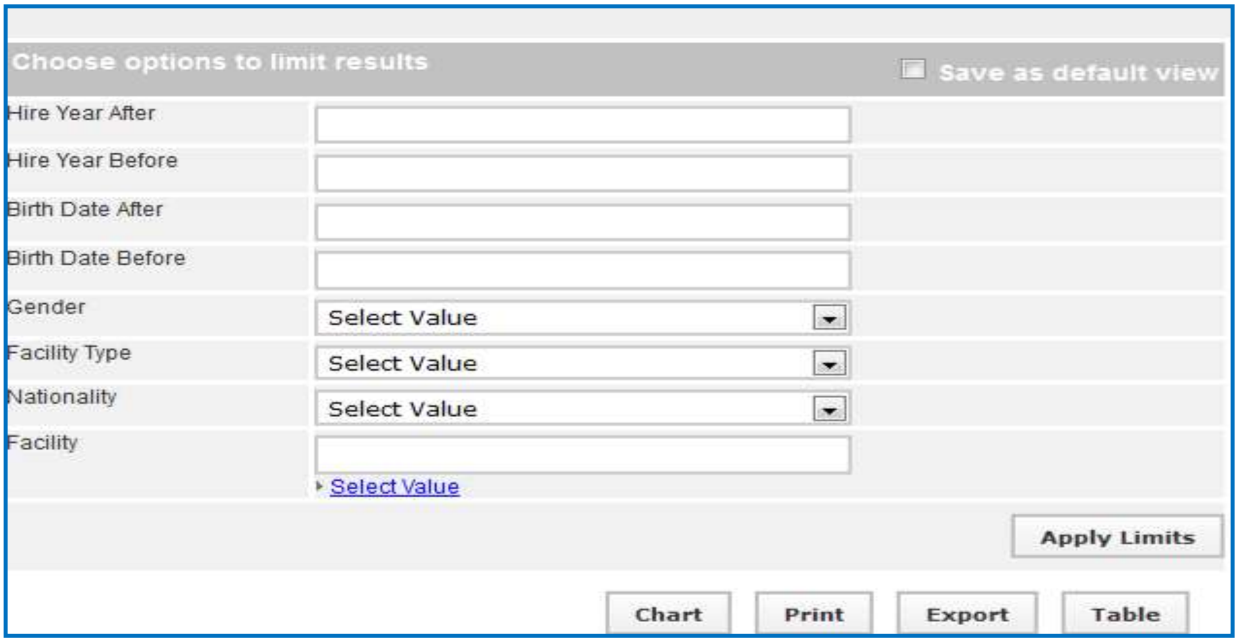


Figure 32: Report filter

Use **Apply Limits** button to filter and narrow the search scope for the selected report.

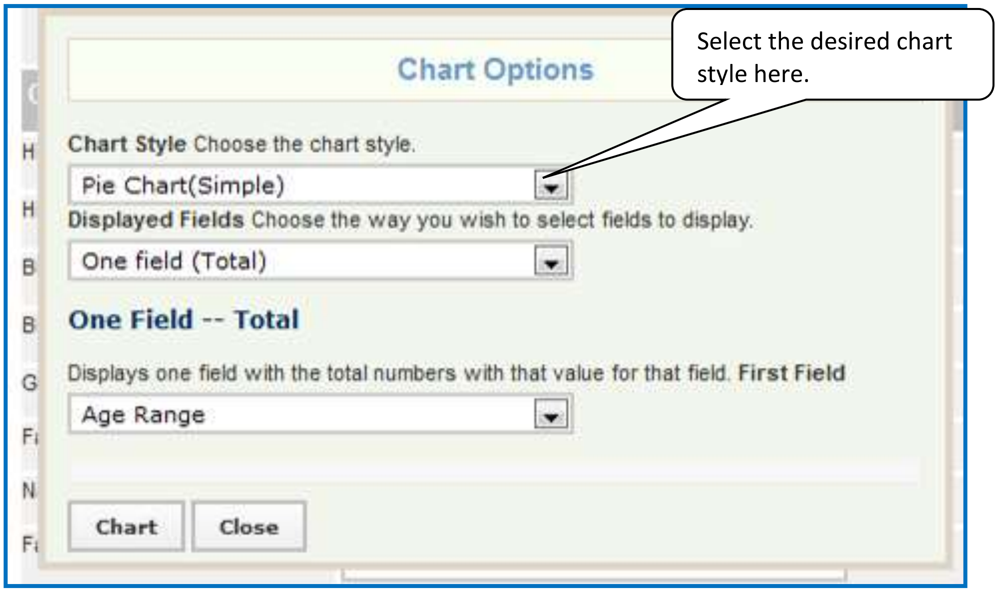


Figure 33: Report Chart Option

Choose the desired chart format from **Chart Style** drop down menu, Choose the way you wish to select fields to display from the **Displayed Fields.**

Note: Using the procedure above, will help to produce the necessary reports as desired by the user

9 Report Views

Report views define how data are displayed in a report. Multiple report views can be created for the same report so that data may be aggregated and analyzed in various ways. For each report, data can be displayed either as a table or as a chart. The data may also be exported for further analysis, or the report may be printed.

9.1 Creating and Editing report views

Administrators and Managers can create new report views or edit views that have already been defined. At least one report view must be defined before a report can be run. Other users may run any report view, but they cannot create new views. Creating report views requires some knowledge of the data fields used in iHRIS manage.

Note: Unless you understand these fields, you should not edit or delete the existing report views pre-defined in HRIS. All changes will be addressed through Change Management process.

To create report views, click **Configure System** under "Manage Reports" click **Report Views**.

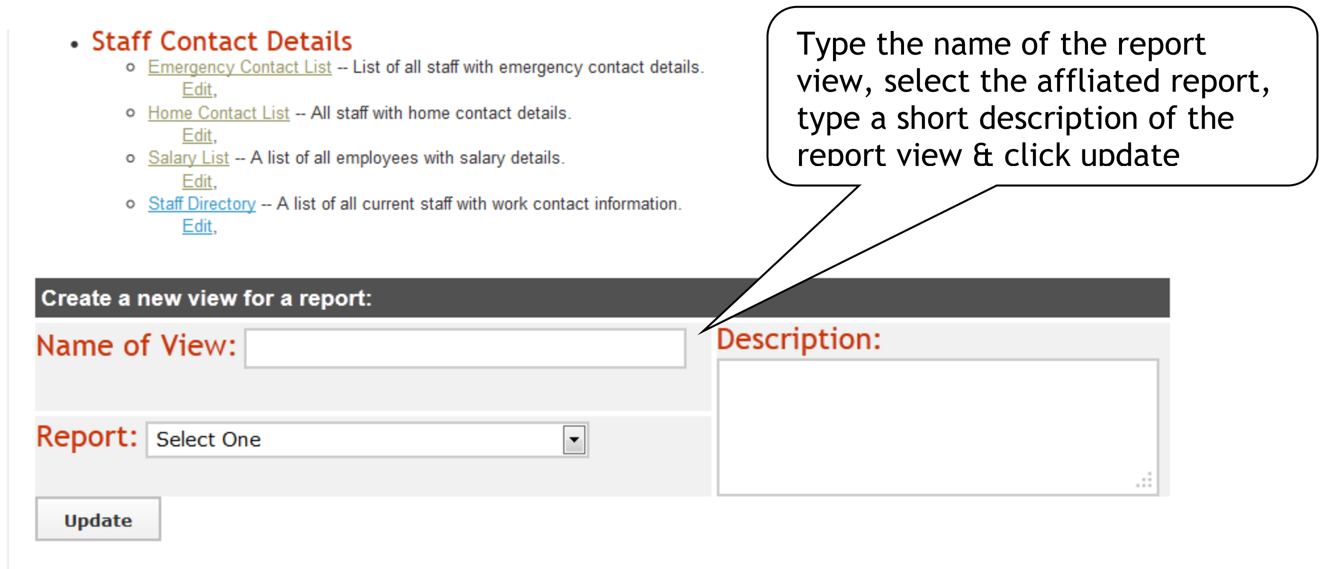


Figure 34: Creating Report

The pop up screen displaying the message '**successfully updated values'** click **Close**

Figure 35: Updates report

Note: The following steps also apply to editing an existing report view

Locate the newly created or existing report view and click on **edit** in order to activate or edit the fields to be seen in the view respectively.

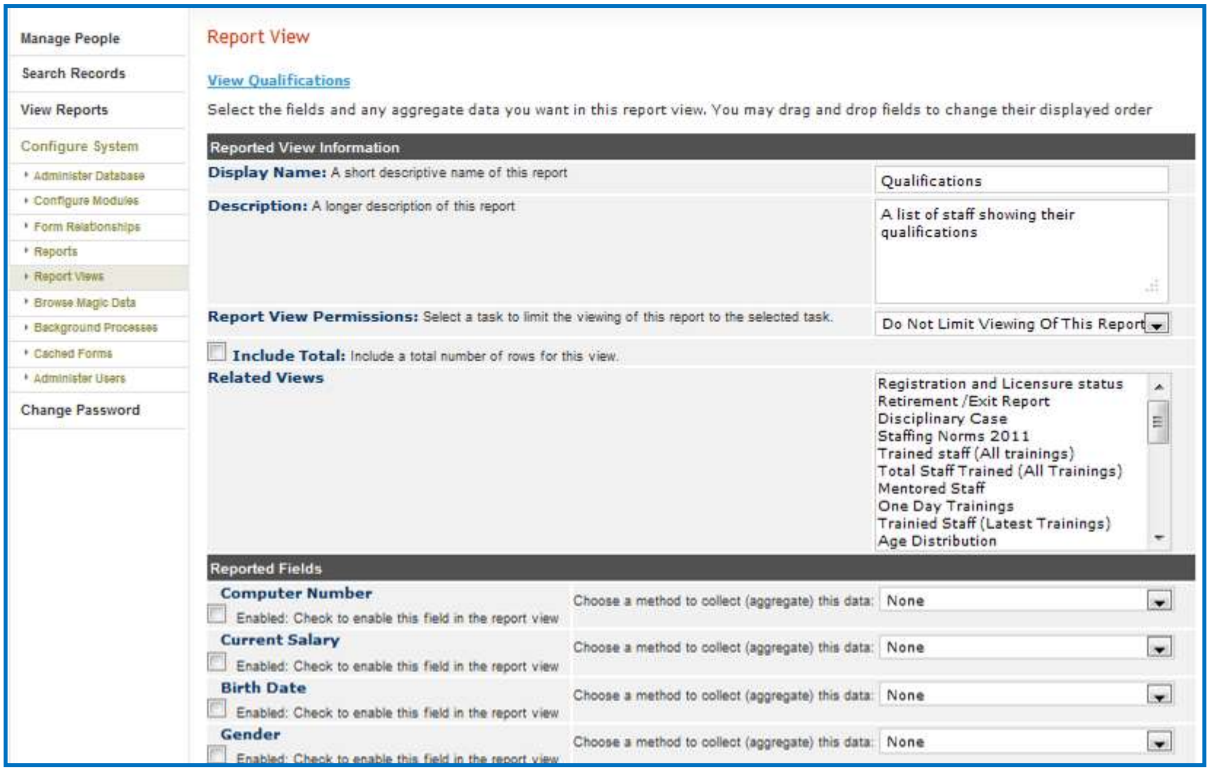


Figure 36: Report view

Click in the check box to enable the field. To change order of display of the fields on the report, point on the field name hold and drag to a desired order.

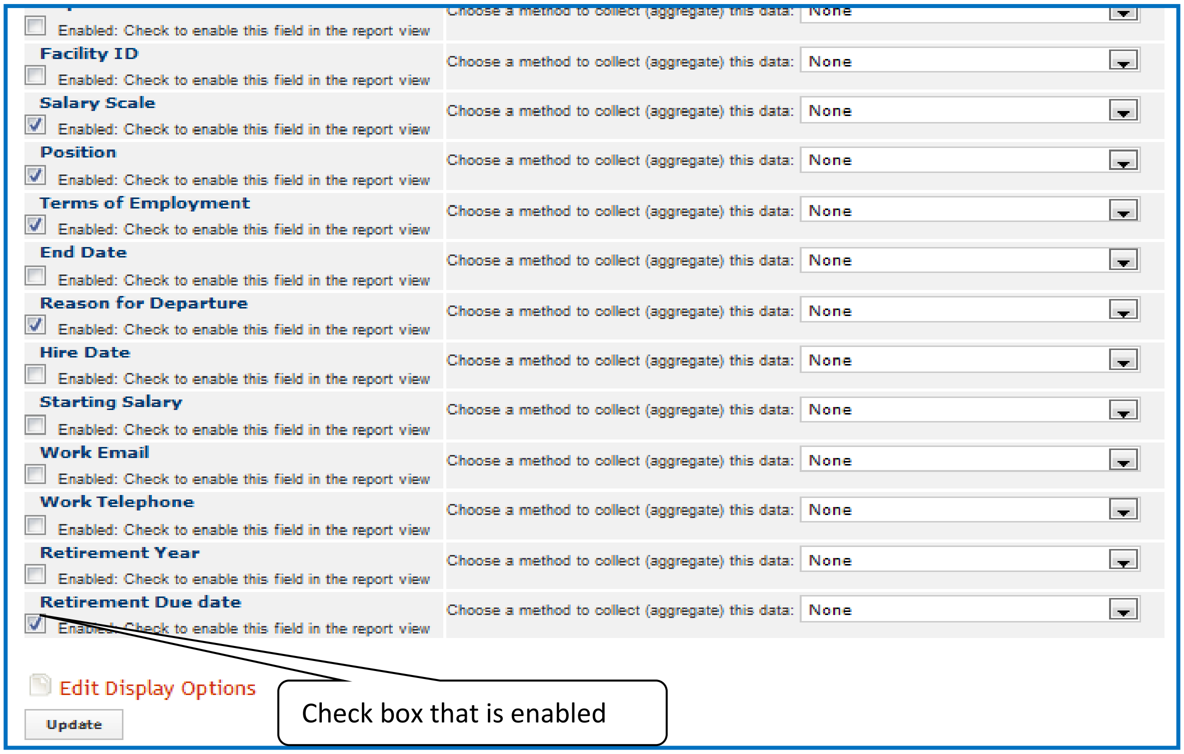


Figure 37: Select report field

After selecting all the desired fields and arrangement, Click **Update**

The pop up screen displaying the message '**successfully updated values'** click **Close**

10 IHRIS MANAGE FREQUENTLY ASKED QUESTIONS

1. **How do I change someone's position information, if he/she has been transferred within the same organization?**

First create the new position in that facility where the person has been transferred to
Click on Configure system → Click on Administer database→Click on position by facility→
Click on Add New Position→ Select the new job of the person→ if the position name is different from the job then change it → Select the facility of the person→Select the department of the person→ Click on confirm and save

Second we search for the person and record the transfer
Click on search records→Click on search people→Type the person's name and click search→ Click on the person's name in the report to open his/her page→Click on Position information on the left menu or scroll down to position information→Click on change position, →Select the new position→ Fill in the salary, Terms of employment and DSC minute if known→ Choose a reason for transfer→ Select what happens to the status of the current position →Click on confirm and save

2. **If he/she has left the organization's service?**

Click on search records→Click on search people→Type the person's name and click search→ Click on the person's name in the report to open his/her page→Scroll down to position information → Click on record a departure, → Select what happens to the status of the current position → Fill in the end date→ Choose a reason for movement→Click on confirm and save.

3. **How do I assign a position for a new person in the service?**

   First create the new position in that facility where the person has been posted
   Click on Configure system → Click on Administer database→ Click on position by facility → Click on Add New Position→ Select the new job of the person → if the position name is different from the job then change it→Select the facility of the person→Select the department of the person→ Click on confirm and save

   Second we search for the person to assign the position

Click on search records→Click on search people→Type the person's name and click search→ Click on the person's name in the report to open his/her page→Scroll down to position information - Click on record a movement → Select what happens to the status of the current position - Fill in the end date→Choose a reason for departure→Click on confirm and save

4. **What happens to the old positions when people change, transfer or depart**
   There are three options that can happen to any position

   - Open - Meaning it's free, it's in the system and no one is occupying it
   - Closed - Meaning it's taken up by someone
   - Discontinued – Meaning it has been eliminated from the staffing norms/establishment.

   When a position is left, by default the position become open, but one can decide to discontinue during the process when you are changing position. If it stays open then when a new employee comes into service we do not have to create it again.

   To view open positions: Click on view reports→Click on position reports→ On the filters down select open and click on Apply limits.

5. **How do I populate (add fields in) the drop down menus?**
   Click on Configure system→Click on Administer database (There is a list of all the fields in the drop down menus) - Click on the one you want to populate →Click on Add New …→Enter the required fields→Click on confirm and save

6. **How do I add a new person in the system?**
   Click on Manage People→Click on Add Person→Fill in the first individual information→Click on confirm and save. Click on Add Demographic information which is tab→Fill in the required fields→Click on confirms and save. Before you click on set position make sure you first create it. After creating the position then assign it to the person. Then add all the necessary information on the person's page

7. **Can the system work without internet?**
   Yes, the system can work without internet.

The system can run on a computer that is not connected to internet.

It can also be access from several offices within the building through the LAN with or without internet.

8. **How is the system backed up and where is it done?**

   The system does an automatic backup on the local computer every day after hours.

9. **Deleting records**: This function is currently reserved for advanced systems administrator and is subject to approval.

10. **What to put in comments and notes sections?**

    Any information deemed to be useful in relation to that section and is not captured by any of the field designed in iHRIS manage.

11. **Why do I continue to see a person in the system when I recorded a movement?**

    When you record a movement, the person's record is not permanently deleted from the database but is deactivated from the staff list. This simply means that the person's record is removed from the active staff list. To view active staff, go to "***view report***" and select "***staff list***".

    However, the person's record will continue to be available in the system and can be viewed through searching the database via "***search records***".

12. **Search records and staff lists gives a different number**

    Numbers on staff list and search list will vary because of the explanation given in the question

13. **How do I know the records entered on a particular day**?

    To get information on record entered on a particular day i.e. not more than one week, click on search records, select recent changes and choose the option of your interest.

14. **How can I tell who accessed the system and what they did?**

    The system keeps a log of all operations and it's accessible by the System Administrator

11 ACKNOWLEDGEMENTS AND THANKS

This user manual has taken a team effort to compile and it would not have been possible without Lena’s dedication and commitment! And a big thank you to the rest of the iHRIS Manage Namibian team that helped with the reviewing and the binding and even recording the steps!

Our sincere thanks and appreciation for your assistance and cooperation to you all!

THE FUTURE WITH iHRIS MANAGE

BEFORE iHRIS **AFTER iHRIS**

Figure 38; before iHRIS **Figure 39: after iHRIS**

12 APPENDIX

Roles	Users	Privileges
Administrators	IntraHealth Team	Have full access to the system and can create new users and change users' passwords.
Executive Managers	Simon Mathias	Have access to Generate reports in order to analyse data; can search for and view any record but cannot enter data into the system. **NB: Cannot create new users or change users' passwords.**
HR Manager	Grape Shimwefeleni	Manages system data, including correcting data and managing data selection lists; can search for, view, enter data and correct any record and generate any report. **NB: Cannot create new users or change users' passwords**
HR Staff	Nandi Ngolo Eunice Nakwatumba Philemon Thomas	Enters and updates records and positions; Can generate any report. **NB: Cannot create new users or change users' passwords**.
Training Manager	Ottilie Nambambi	**Training Manager:** Sets up the in-service training management program, schedules employees for trainings and evaluates employees' performance in trainings. Cannot create new users or change users' passwords.