## Worker’s Personnel Actions Management

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| Primary Persona: | HR Manager or HR Representative. |
| Configuration Settings | Browsers: Chrome, Internet Explorer. |
| Problem / Opportunity Statement: | The HRM Solution addresses the problem of managing employess, i.e hire worker, transfer worker, terminate worker, rehire worker and hire applicant. |
| User Goals: | Human Resource will be managing worker’s personnel action in **Personnel Action Request** entity of the system. |
| Business Goals: | * Manage Hire Applicant, worker can be hire from the applicant who has been selected during the recruitment process.
* Mange hire worker, worker can be directly hire if there is no recruitment process.
* Mange transfer worker, human resource can easily change the position of worker.
* Mange worker termination.
* Mange rehire worker, Provide provision to rehire the inactive worker.
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| Triggers: |  |
| Narrative Description (e.g., plans, evaluation, actions, objects, context, events): | Human Resource Login’s into the system. They can easily perform personnel actions regarding worker, Main objective is to maintain a system that can handle worker’s hiring, transfer and termination |
| Detailed Steps | 1. Hire Applicant.
	1. Go to **Sales > My Work > Activities** in the navigation bar.
	2. Click on the **Personnel Actions** button on the ribbon bar and a dropdown menu will open, click on the hire applicant.
	3. It will open new form for hire applicant.
	4. Select the applicant, which user want to hire and fill other information on the form.
	5. If user want to assign position to the worker, mark check **Assign a position** checkbox.
	6. Select the position, either user can create new position and then select it.
	7. Fill the information on the form and click on the save button.
2. Approve Hire Applicant.
	1. Open the record user created in step 1.
	2. User will see **Approve** button on the ribbon bar.
	3. Click on the approve button to approve the hire applicant request, user will see confirmation message as “Success”.
3. Reject Hire Applicant.
	1. Open the record user created in step 1.
	2. User will see **Reject** button on the ribbon bar.
	3. Click on the Reject button to reject the hire applicant request, user will see confirmation message as “Success”.
4. Hire Worker.
	1. Go to **Sales > My Work > Activities** in the navigation bar.
	2. Click on the **Personnel Actions** button on the ribbon bar and a dropdown menu will open, click on the hire worker.
	3. It will open new form for hire worker.
	4. If user want to assign position to the worker, mark check **Assign a position** checkbox and select the position which user want to assign, either user can create new position and then select it.
	5. Fill other information and click on the save button.
5. Approve Hire Worker.
	1. Open the record user created in step 4.
	2. User will see **Approve** button on the ribbon bar.
	3. Click on the approve button to approve the hire worker request, user will see confirmation message as “Success”.
6. Reject Hire Worker.
	1. Open the record user created in step 4.
	2. User will see **Reject** button on the ribbon bar.
	3. Click on the Reject button to reject the hire worker request, user will see confirmation message as “Success”.
7. Transfer Worker.
	1. Go to **Sales > My Work > Activities** in the navigation bar.
	2. Click on the **Personnel Actions** button on the ribbon bar and a dropdown menu will open, click on the transfer worker.
	3. It will open new form for transfer worker.
	4. Select the worker, current position and new position, which user want to assign.
	5. If user want to retire current position of the worker, mark check **Retire Position** checkbox. It will change current position status to inactive.
	6. Fill the other information on the form and click on the save button.
8. Approve Transfer Worker.
	1. Open the record user created in step 7.
	2. User will see **Approve** button on the ribbon bar.
	3. Click on the approve button to approve the transfer worker request, user will see confirmation message as “Success”.
9. Reject Transfer Worker.
	1. Open the record user created in step 7.
	2. User will see **Reject** button on the ribbon bar.
	3. Click on the Reject button to Reject the transfer worker request, user will see confirmation message as “Success”.
10. Terminate Worker.
	1. Go to **Sales > My Work > Activities** in the navigation bar.
	2. Click on the **Personnel Actions** button on the ribbon bar and a dropdown menu will open, click on the terminate worker.
	3. It will open new form for terminate worker.
	4. Select the worker and termination reason, either user can create new worker and termination reason and then select it.
	5. If user want to retire current position of the worker, user can mark check **Retire Position** checkbox. It will change current position status to inactive.
	6. Fill the other information on the form and click on the save button.
11. Approve Terminate Worker.
	1. Open the record user created in step 10.
	2. User will see **Approve** button on the ribbon bar.
	3. Click on the approve button to approve the termination worker request, user will see confirmation message as “Success”.
12. Reject Terminate Worker.
	1. Open the record user created in step 10.
	2. User will see **Reject** button on the ribbon bar.
	3. Click on the Reject button to Reject the termination worker request, user will see confirmation message as “Success”.
13. Rehire Worker.
	1. Go to **Sales > My Work > Activities** in the navigation bar.
	2. Click on the **Personnel Actions** button on the ribbon bar and a dropdown menu will open, click on the rehire worker.
	3. It will open new form for rehire worker.
	4. Select the worker user want to rehire.
	5. If user want to assign position to the worker, user can mark **assign a Position** checkboxas check.
	6. Select the worker and fill the other information on the form and click on the save button.
14. Approve Rehire Worker.
	1. Open the record user created in step 13.
	2. User will see **Approve** button on the ribbon bar.
	3. Click on the approve button to approve the Rehire worker request, user will see confirmation message as “Success”.
15. Reject Rehire Worker.
	1. Open the record user created in step 13.
	2. User will see **Reject** button on the ribbon bar.
	3. Click on the Reject button to Reject the Rehire worker request, user will see confirmation message as “Success”.
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| Success Metrics: | 1. Hire Applicant :
* Record will be created in personnel action request entity.
* Record status reason will be set to requested.
1. Approve Hire Applicant :
* Record will be created in worker entity.
* Applicant’s contact will be associated in the worker.
* If assign a position == true then a record will be created in Worker Position Assignment entity with associated worker.
* Record will be created in employment entity with associated worker.
* In Personnel action request entity, status reason will be changed to approved.
1. Reject Hire Applicant :
* Status reason will be changed to disapproved in personnel request entity.
1. Hire Worker:
* Record will be created in personnel action request entity.
* Record status reason will be set to requested.
1. Approve Hire Worker :
* Record will be created in contact entity.
* Record will be created in worker entity, associated with the contact.
* If assign position == true, then a record will be created in worker position assignment entity, and that will be associated with the worker.
* Record will be created in Employment entity associated with worker.
* In Personnel action request status reason will be changed to approved.
1. Reject Hire Worker :
* Status reason will be changed to disapproved in personnel request entity.
1. Transfer Worker:
* Record will be created in personnel action request entity.
* Record status reason will be set to requested.
1. Approve Transfer Worker :
* Record is created in worker Position assignment entity for new position.
* Postion is associated with the selected worker.
* Worker current position will be inactive in worker position assignment entity.
1. Reject Transfer Worker :
* Status reason will be changed to disapproved in personnel request entity.
1. Terminate Worker:
* Record will be created in personnel action request entity.
* It’s status reason will be requested.
1. Approve Terminate Worker :
* Record is created in employment history entity associated with the worker.
* Selected worker will be inactive in worker entity.
* Worker position will be inactive in worker positon entity.
* In Personnel action request entity status will be changed to approved.
1. Reject Terminate Worker :
* Status reason will be changed to disapproved in personnel action request entity.
1. Rehire Worker:
* Record will be created in personnel action request entity.
* Record status reason will be set to requested.
1. Approve Rehire Worker :
* Selected worker status will be set to active in worker entity.
* Record will be created in worker position assignment entity associated with the worker.
* In Personnel action request entity status will be changed to approved.
1. Reject Rehire Worker :
* Status reason will be changed to disapproved in personnel action request entity.
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## Absence Management

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| Primary Persona: | HR Manager or HR Representative. |
| Configuration Settings | Browsers: Chrome, Internet Explorer. |
| Problem / Opportunity Statement: | The HRM Solution addresses the problem of managing employee’s absence. |
| User Goals: | Human Resource will be managing worker absence in absence journals entity of the system. |
| Business Goals: | * Manage Absence setup for the worker.
* Mange Employee Absence journals, Easy to track employee’s journal.
* Mange creating absence transaction series for the past absence.
* Mange creating absence request series for the future absence.
* Mange absence journal and request approvals.
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| Triggers: |  |
| Narrative Description (e.g., plans, evaluation, actions, objects, context, events): | Human Resource login’s into the system. They can create absence journal, absence transaction and absence request. They can configure the absence setup for the worker that will use for the absence transaction and absence request approval or rejection. |
| Detailed Steps | 1. Create Absence setup.
	1. Go to **HRM Settings > Absence > Absence Setup** in the navigation bar.
	2. Click on the new button shown on the ribbon bar.
	3. It will open new form, select the administrator.
	4. Fill other information on the form and click on the save button.
2. Assign absence setup and user settings to the worker.
	1. Go to **HRM > Worker > Workers** in the navigation bar.
	2. User will see list of workers, double click on the desired worker to open it.
	3. User will see **Absence** Section under the **Settings** tab.
	4. Select the **System user** in the User Setting section (Note: user should have email address).
	5. Select **Absence setup** and **Absence setup start date** and click on the save button.
3. Create Absence Journal.
	1. Go to **HRM > Absence > Absence Journals** in the navigation bar.
	2. Click on the new button, new form will be open.
	3. Select the worker and period of journal, either user can create new one and then select it. (Note: - Absence journal Start date should be greater than or equal to worker Absence start date, Absence journal start date is coming from period).
	4. Click on the save button.
4. Create Absence Registration Series.
	1. Go to **HRM > Absence > Absence Journals** in the navigation bar.
	2. User will see list of absence journals, double click on the desired absence journal to open it.
	3. User will see **Create Absence Registration Series** button on the ribbon bar, click on the button.
	4. Popup window will displays enter start date, end date and Absence code. (Note: Absence registration can be only create for the past leave.)
	5. Fill other information and click on the create button.
	6. Confirmation message shown as “success”. Refresh the page user can see multiple absence transactions in the grid on the form.
5. Create Absence Request Series.
	1. Go to **HRM > Worker > Workers** in the navigation bar.
	2. User will see list of workers, open the worker in which user want to create Absence request series.
	3. User will see **Create Absence Request Series** button on the ribbon bar, click on the button.
	4. Popup window will displays enter start date, end date and Absence code. (Note: Absence Request can be only create for the future leave.)
	5. Fill other information and click on the create button.
	6. Confirmation message will shows as “success”. Refresh the page, and then user can see multiple absence requests in the grid, on the worker form under Time and Attendance tab.
6. Create “no reply” queue for absence module.
	1. Go to **Settings > Business Management > Queues** in the navigation bar.
	2. Click on the new button shown on the ribbon bar, it will open new form.
	3. Enter name as “no queue” and enter incoming email address.
	4. Fill other information on the form and click on the save button.
7. Submit Absence Request.
	1. Go to **HRM > Worker > Workers** in the navigation bar.
	2. User can see list of worker, double click on the worker record in which user want to submit Absence Request.
	3. On the worker form, user will see Absence Request grid under Time and Attendance tab, open the tab and double click on the record, which user want to submit.
	4. Absence request form will open, user will see submit button on the ribbon bar. (Note: Worker should have email address that is coming up form contact selected in the worker).
	5. Click on the button, user will get confirmation message as “success” and then refresh the page.
8. Approve Absence Request.
	1. Go to **HRM > Worker > Workers** in the navigation bar.
	2. User can see list of worker, double click on the worker record in which user want to submit Absence Request.
	3. On the worker form, user will see Absence Request grid under Time and Attendance tab, open the tab and double click on the record, which user want to approve.
	4. Absence request form will open, user can see approve button on the ribbon bar.
	5. Click on the button, user will get confirmation message as “success” and then refresh the page.
9. Reject Absence Request.
	1. Go to **HRM > Worker > Workers** in the navigation bar.
	2. User will see list of worker, double click on the worker record in which user want to submit Absence Request.
	3. On the worker form, user will see Absence Request grid under Time and Attendance tab, open the tab and double click on the record, which user want to reject.
	4. Absence request form will open, user will see Reject button on the ribbon bar.
	5. Click on the button, user will get confirmation message as “success” and then refresh the page.
10. Submit Absence Journal.
	1. Go to **HRM > Absence > Absence Journals** in the navigation bar.
	2. User will see list of Journals, double click on the journal record, which user want to submit.
	3. User will see submit button on the ribbon bar.
	4. Click on the button to submit the journal, user will get confirmation message as “success” and then refresh the page.
11. Approve Absence Journal.
	1. Go to **HRM > Absence > Absence Journals** in the navigation bar.
	2. User will see list of Journals, double click on the journal record, which user want to approve. User will see approve button on the ribbon bar. (**Note:** approve button only visible for the manager, to check manager of journal go to **worker** < on the worker form, under settings tab user will see Absence setup lookup field, click on the field that will open the record, user will see administrator field on the form that is worker lookup field. Click on the worker it will open worker form go to settings tab, user will see **System** **Use**r field that is the manager (which is user entity lookup if login user == system user then approve button will be visible).
	3. Click on the approve button to approve the absence journal and then refresh the page (Note: no Absence transactions of the journal should be in open state. There is field on the absence transaction **Is Open** that should be set to true).
12. Reject Absence Journal.
	1. Go to **HRM > Absence > Absence Journals** in the navigation bar.
	2. User will see list of Journals, double click on the journal record, which user want to reject.
	3. User will see reject button on the ribbon bar. (Note: Reject button only visible to journal manager).
	4. Click on the reject button to reject the absence journal and then refresh the page..
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| Success Metrics: | 1. Create Absence setup :
* Record will be created in the Absence Setup entity.
1. Assign absence setup and user settings to the worker :
* Record will be updated in worker entity.
1. Create Absence Journal :
* Record will be created in Absence Journal entity.
1. Create Absence Registration Series :
* Multiple Absence Registration records will be created in absence Transaction entity according to date range.
1. Create Absence Request Series :
* Multiple Absence Request records created in absence Request entity according to date range.
1. Create “no reply” queue for absence module :
* Record will be created in queue entity..
1. Submit Absence Request :
* Absence request status will be changed to Submitted.
* An email is send to Worker Manager. ( Note : To check worker manager click on the Absence setup field > Absence setup record will open > Administrator field is worker manager field)
1. Approve Absence Request :
* Absence request status will be changed to approved.
* A record will be created in absence transaction entity.
* An email is send to worker.
1. Reject Absence Request :
* Absence request status will be changed to Rejected.
* An email is send to worker.
1. Submit Absence Journal :
* Absence journal status will be changed to submitted.
* An email will send to the journal manager.
1. Approve Absence Journal :
* Absence journal status will be changed to Approved.
* An email will send to worker.
1. Reject Absence Journal :
* Absence journal status will be changed to Rejcted.
* An email will send to worker.
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