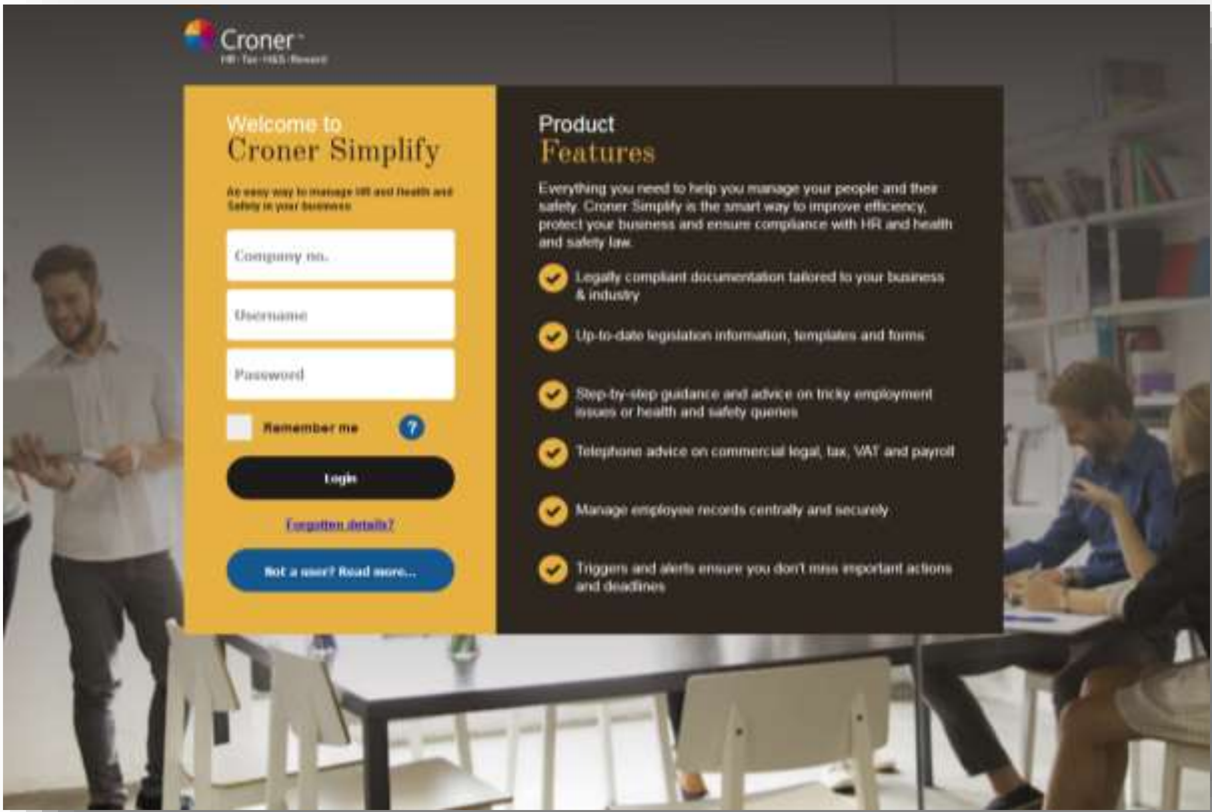
Croner
HR · Tax · H&S · Reward

Croner Simplify



~ Employee Training Workbook ~

Version 3.0

Employee View

An Employee logging on to Croner Simplify is known as a Self-Service Employee. An employee can see and manage information about themselves. An employee's responsibilities within Croner Simplify are to request holiday for approval by their Manager, change personal details when necessary for approval by HR and manage tasks allocated to them; employees have access to Company documents and will be expected to keep up to date with changes. An employee can be given responsibilities within the Health and Safety.

Objectives

- Request holiday using Simplify
- Request personal detail change
- View and execute tasks where required
- Documents – View standard policies and guidelines, view personal documents

Contents

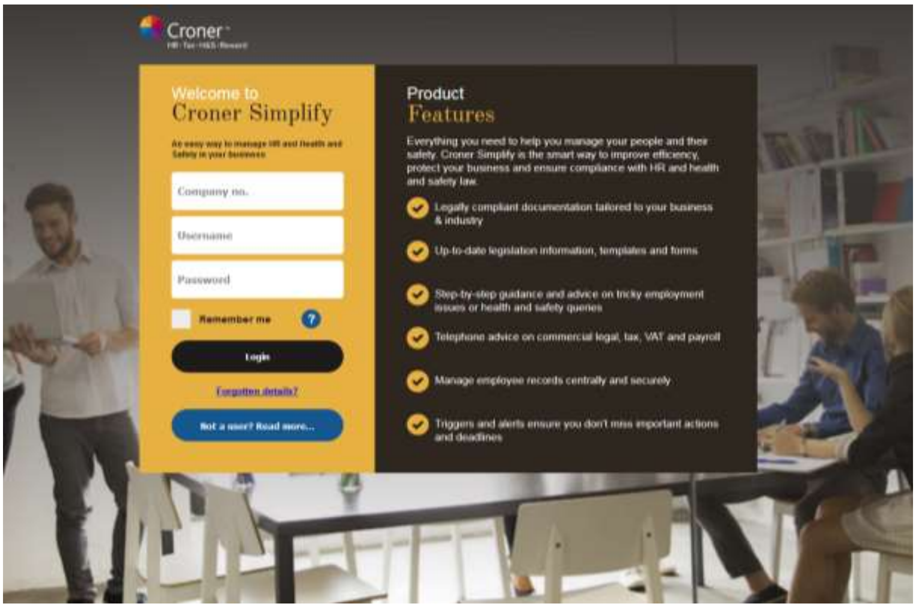
Navigation

This section will assist you in navigating around Croner Simplify.

Logging In & Out

Logging In

- When an account is created for an employee an email will be sent to them from Simplify with a link to the website and with instructions on how to log on. A password will need to be created following the rules given of at least 8 letters, a capital letter and a lower case letter
  Once this process has been completed an employee is ready to log on
- Go to the website www.cronersimplify.co.uk. Once the website is launched save it to your favourites
- The following screen appears



From this page you will need to enter:

The company number – XXXXX

Username – your email address

Password: the password you chose

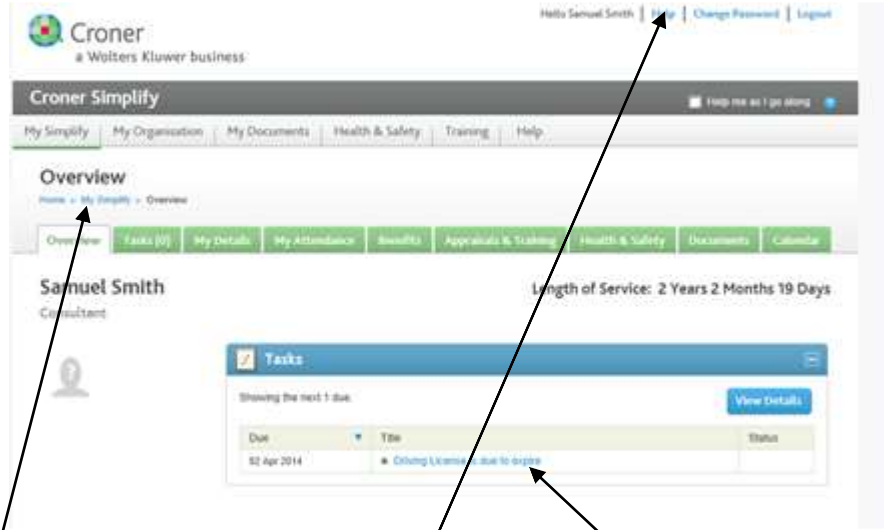
Forgotten Password

If you do not know your password you can click on the ‘Forgotten password’ link which will take you to a screen to create a new password.

Logging Out

- Click Logout at the top right hand corner of the screen

Useful Navigation Tools



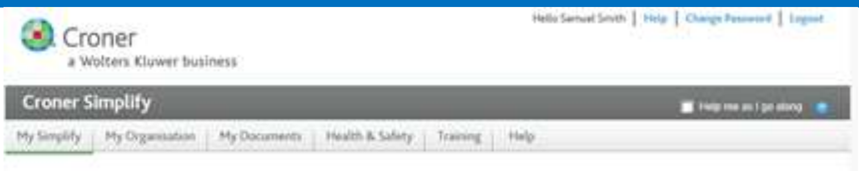
When navigating through several screens, retrace your steps by using the trail

Click on **Help** to access easy to use guides

The blue **Quicklinks** take you to the task in hand

The 'Help me as I go along' function provides handy tool tips.

Overview of Tabs



My Simplify – Contains all the areas you will need to use within Simplify.

My **Organisation**– View a graphical display of your organisation.

My Documents – An area where Company documents and Health and Safety guidelines can be viewed. Personal Documents can also be viewed here.

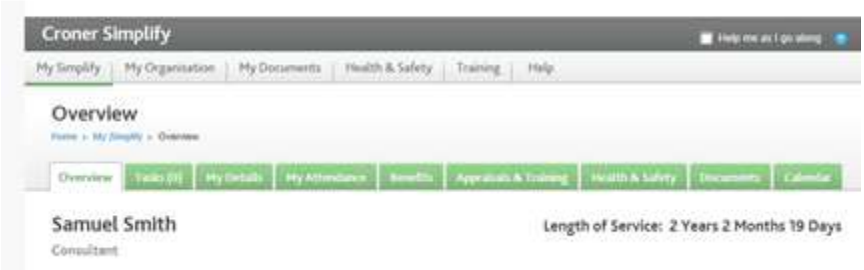
Health and Safety – A tab will appear if permission to access this area has been given by the Administrator. Policy, Procedure and Risk Assessment documentation as well as the Audit and Accident Reporting Tools are stored here.

Training – Video, E-Learning and Podcast training courses are available here.

Help – Provides guidance and assistance on using Simplify.

My Simplify

My Simplify is divided into tabs for all the areas of Simplify containing your information.



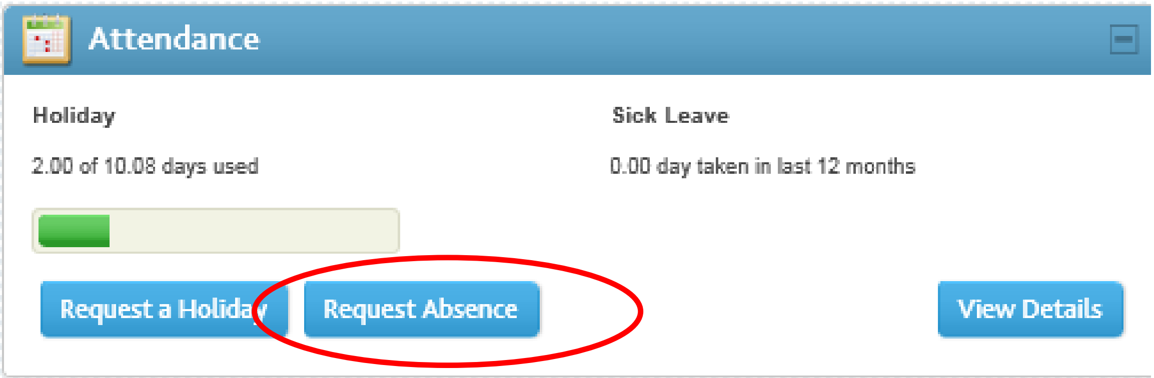
Overview

The Overview tab is a summary of the current day showing tasks, attendance and up and coming changes. From here you can quickly request a holiday.

Click on the Request a Holiday Button and complete the Start Date and End Date Boxes. When complete click on the 'Save' button.
This will send an email and an 'Employee Request' to an employee's Manager for the holiday to be accepted or rejected.
It will also mark the dates as 'Unconfirmed Holiday' on the employee's Simplify Calendar.

When the holiday has been accepted or rejected an email will be sent to the employee concerned and the holiday confirmed on the calendar.

If the employee is given the relevant permission, they will be able to request absences in the “Other” category. Examples of this type of absence are Study leave, TOIL (time off in Lieu) and Jury service.

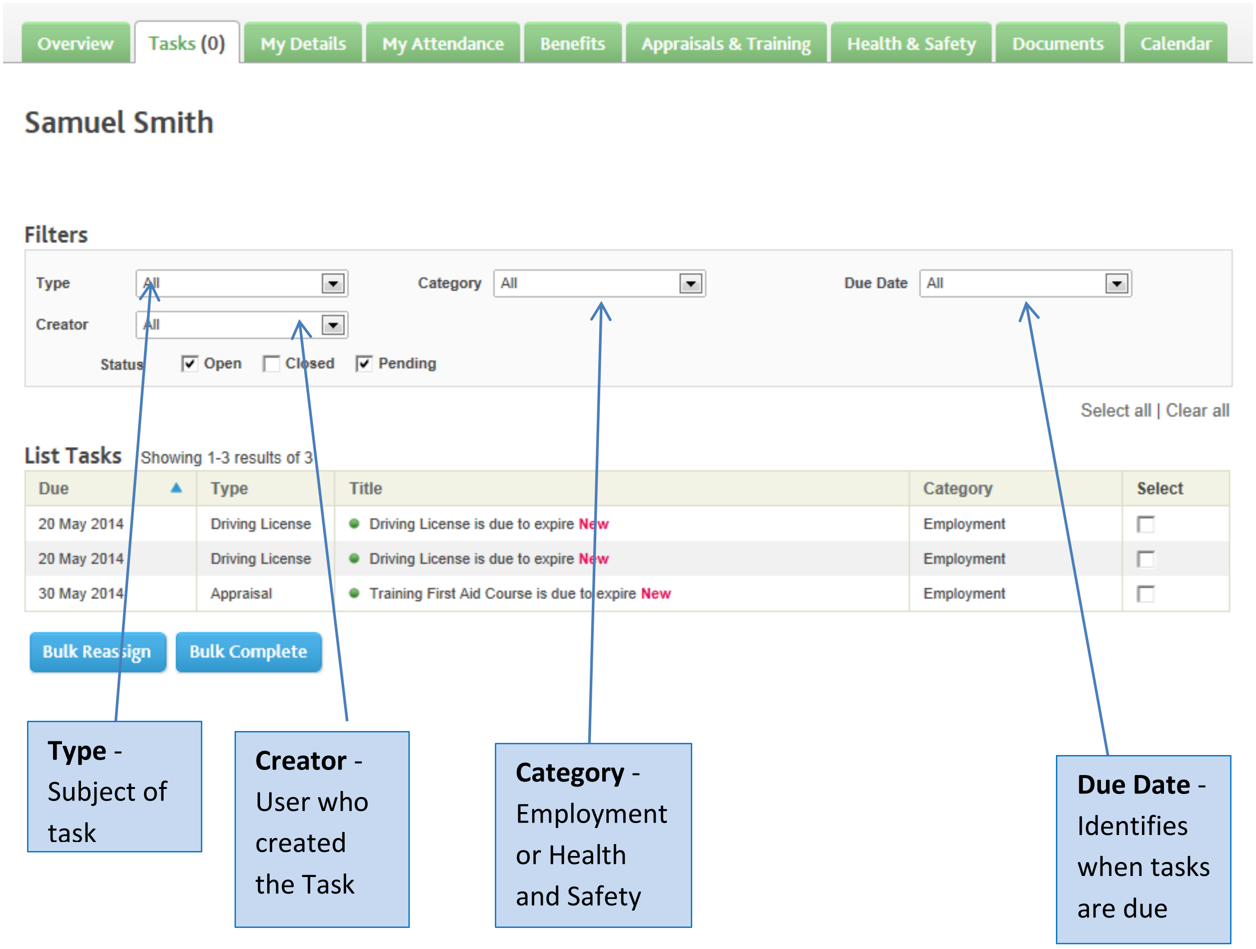


This will send an email and an ‘Employee Request’ to an employee’s Manager for the absence to be accepted or rejected.
It will also mark the dates as ‘Unconfirmed Absence’ on the employee’s Simplify Calendar.

Tasks

Tasks are either system generated and created during system setup (e.g. probationary period reminder), or client generated which are event driven (such as when a training qualification is due to expire).

A table containing the list of tasks exists under the Tasks tab and enables the user to filter, complete and reassign tasks.



Employees will only see tasks assigned to themselves.

Event generated tasks will appear in the table on the date stipulated by the user at the time of creation.

System generated tasks will appear in the table at a timescale defined by the system in accordance with the task type; this timescale cannot be overridden.

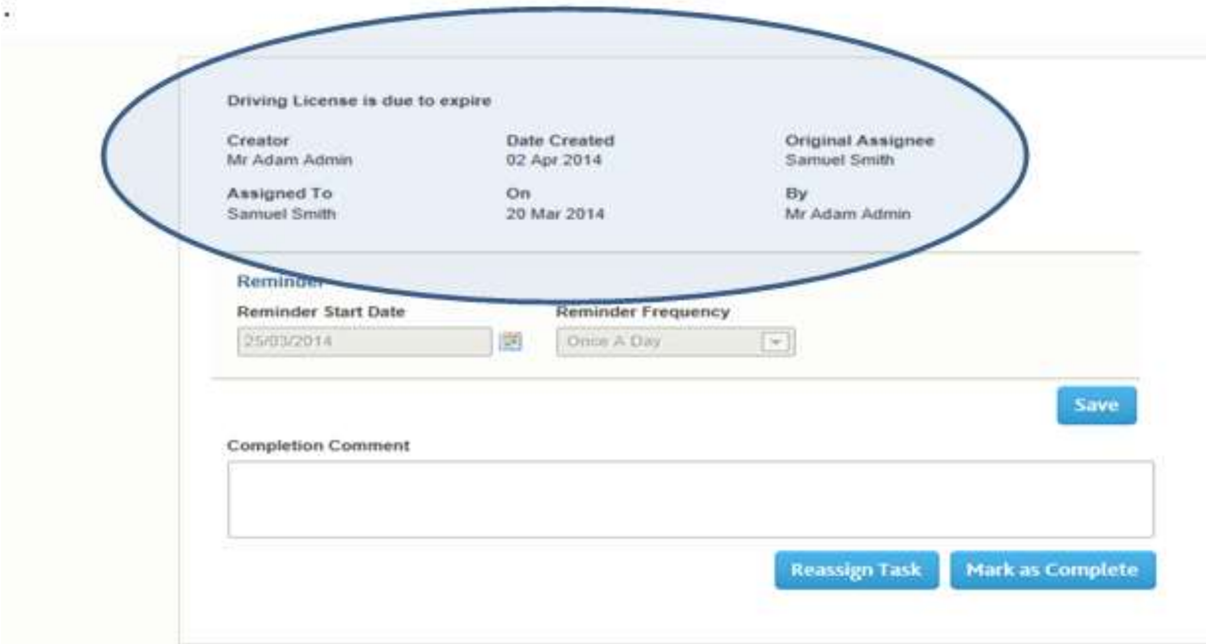
Tasks will automatically appear in the list on their active date.

Tasks that are not yet due can only be viewed by putting a tick in ‘Pending’.

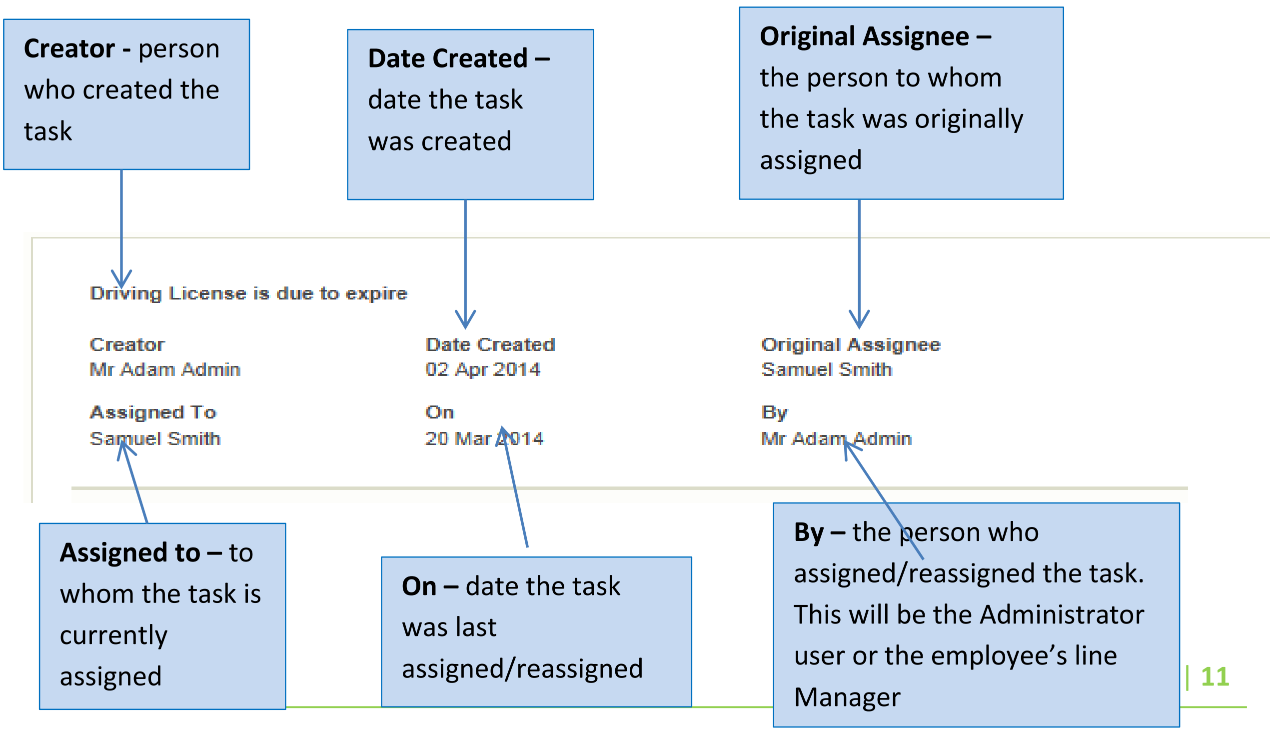
Simplify allows reminders to be set which will send email prompts to the Assignee and, if required, the Creator. These reminders will start on the stipulated date and re-occur at the frequency set when created e.g. Once a day, Once a week, Once a month.

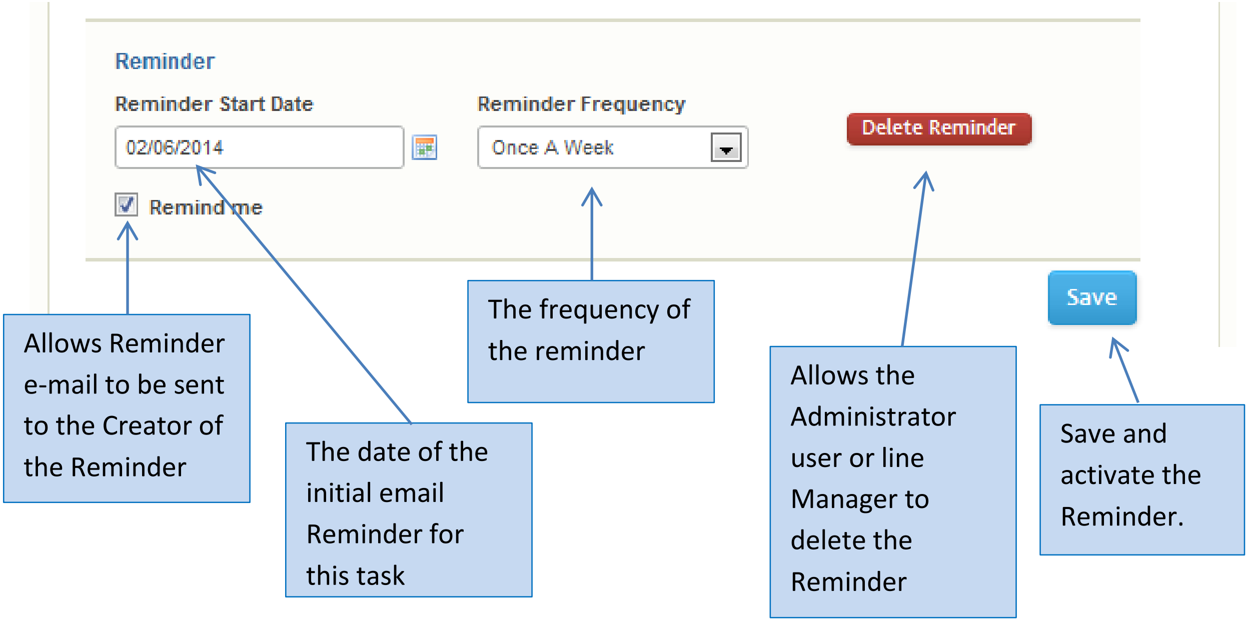
Click on a task to open and view the detail.

.



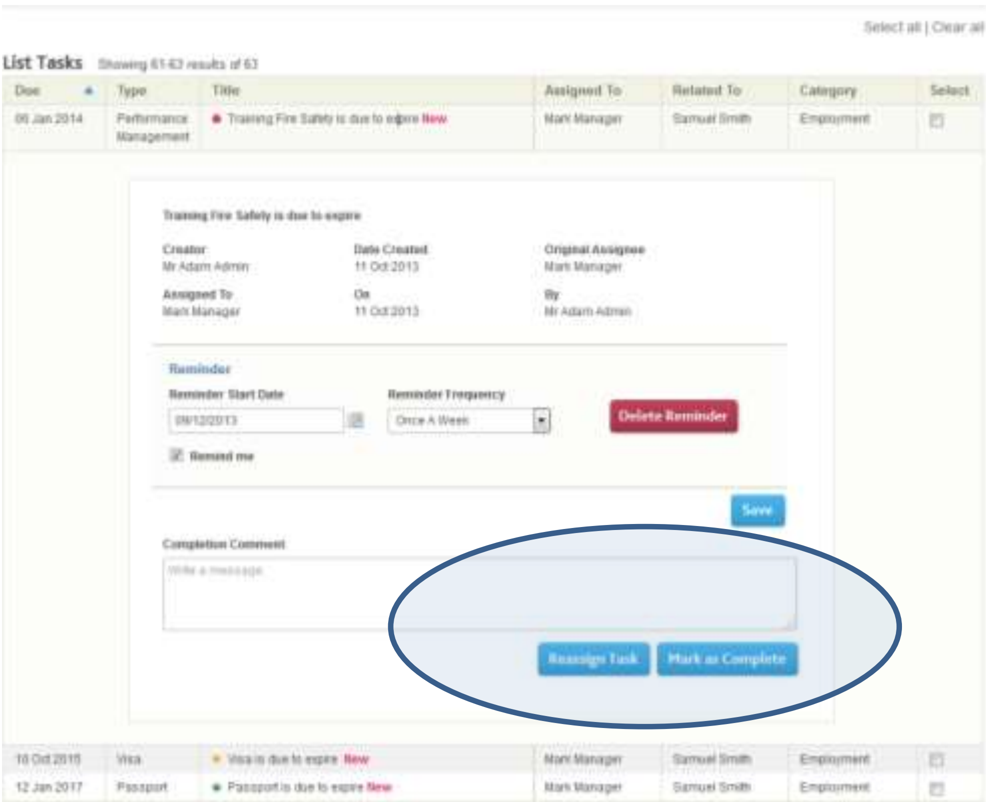
The screen shot below explains the detail of a task.





Where no reminder date for a task has been set, the task will appear in the Task List on its active date [which will depend on the type of task]. Any reminder date set will automatically override the active date.

It is possible to reassign a Task.



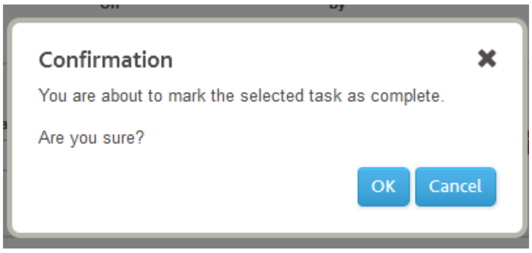
By clicking on the ‘Reassign Task’ button a new window will open.

From this window a user is able to reassign the task and enter a relevant comment. By clicking ‘Reassign’ the task is saved against the new assignee and any reminders will now go to the new assignee.

Tasks can only be assigned to current employees who are set up on self-service. Any task assigned to an employee who subsequently leaves the organisation before the task is complete is re-assigned to the default Administrator user. If the leaver is a Manager, Simplify will re-assign the task to the new Manager or the Default Administrator user if no replacement Manager is selected.

A user is also able to mark a task as complete from this window by clicking the ‘**Mark as Complete**’ button.

A confirmation window is displayed.

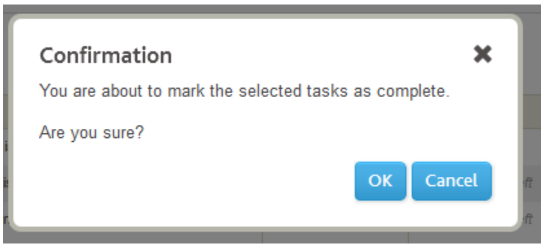


By selecting **OK** the task is marked as complete and will clear the task from the Task List.

To reassign multiple tasks or mark multiple tasks complete, check the box adjacent to the task and select **Bulk Reassign** or **Bulk Complete** as appropriate.

By clicking Bulk Reassign the following window will open. Select the new assignee for the multiple tasks being reassigned and comments if required. Click **Reassign**.

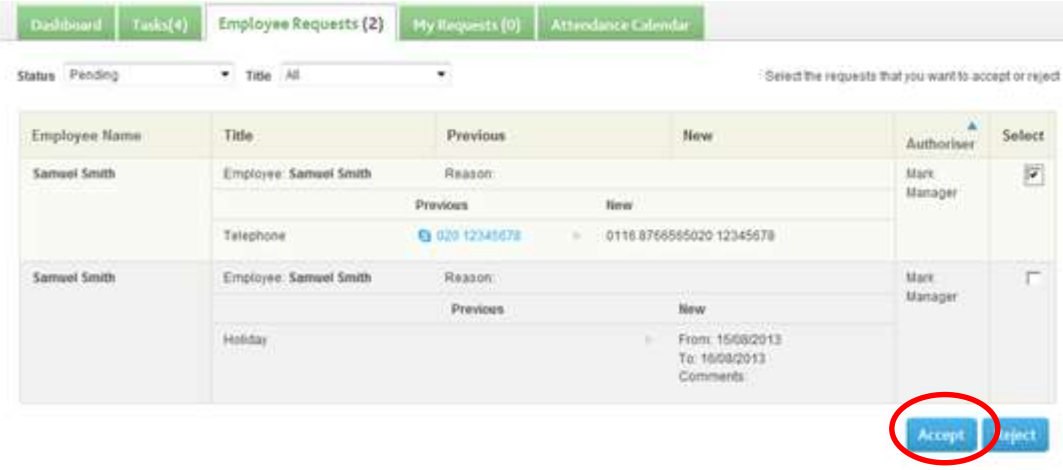
By clicking **Bulk Complete** the following window will open.



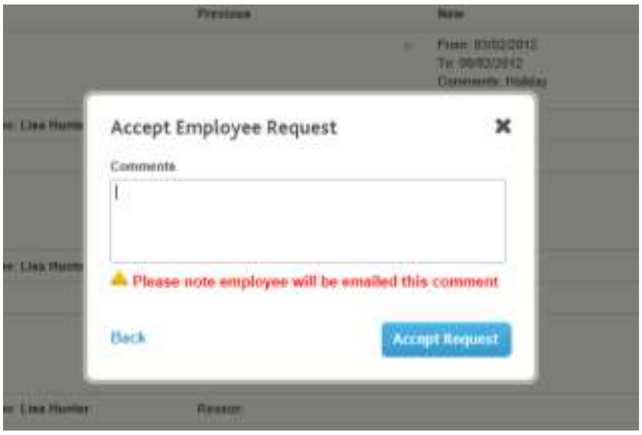
Click **OK**. This will mark all items checked in the Task List as complete and remove them from the list.

Employee Requests

- For an Employee this section of the manual is for information only
- When a Self-service Employee makes a request it appears in The Employee Request tab of either their Simplify Manager or Administrator. The Manager or Administrator is able to accept or reject the requests such as holiday or changes in personal details



- Add a comment in the **Comments** box
- Click **Accept Request**



My Details

This area displays your employee record and your personal details stored on Croner Simplify.

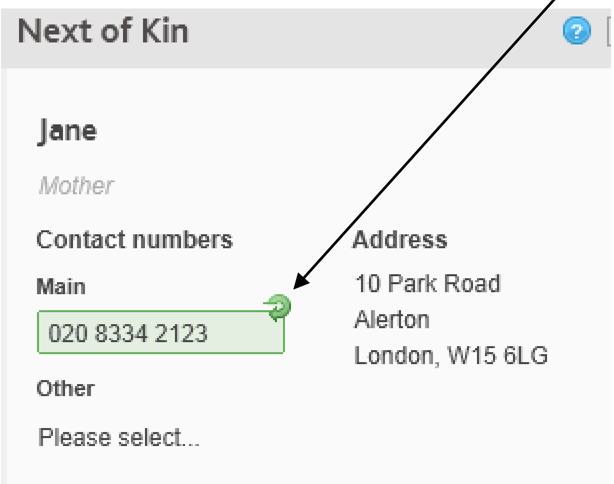
There are fields for

- Personal Details
- Employment Details
- Next of Kin
- Contact Details
- Bank Details
- Right to Work Details

You can make changes to your personal details such as changing your address if you move.

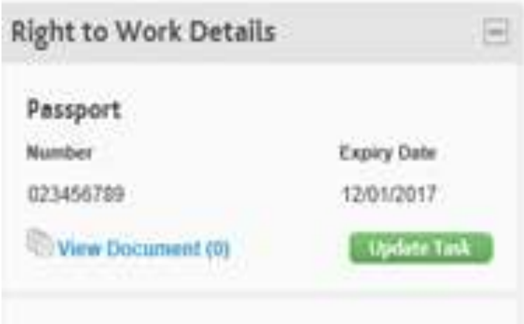
Click next to the field you wish to amend and click on the Paper and pencil edit icon.

Make the changes and when you see the green arrow go to the top of the page and click the blue 'Save All Changes' button.



When you click **Save All Changes** the details of the change will be sent to your Manager or Administrator to be approved. This is to ensure that your changes are registered and added to any other system, such as a payroll system, that may need to be altered.

Employees 'Right to Work' details are stored within this area.

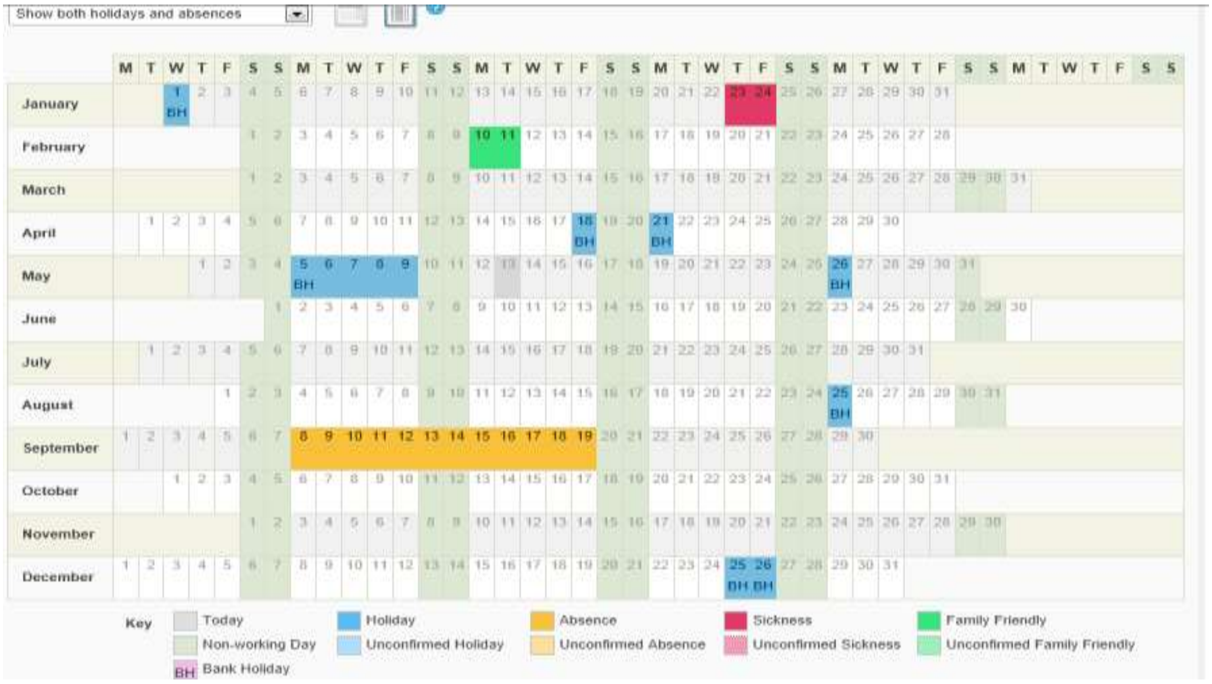


To create a task which will highlight that the expiry date is approaching, click on the Create Task button, input to Due Date the date on which the passport will expire. Select Set Reminder to set up a reminder ahead of the due date for renewal and set the frequency of the reminder. Save to activate.

Attendance

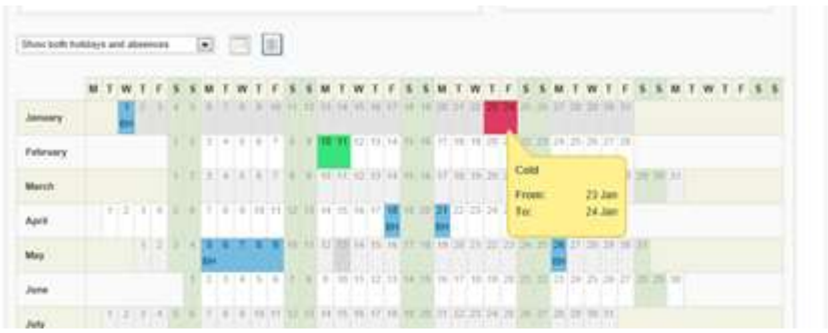
My Attendance shows a summary of the annual holiday entitlement an employee has and the Bank Holidays for that year. On the right it shows the number of day's absence taken in a year separated into different absence categories of Sickness, Family and Other.

At the bottom of the screen is the employee's calendar for the year.

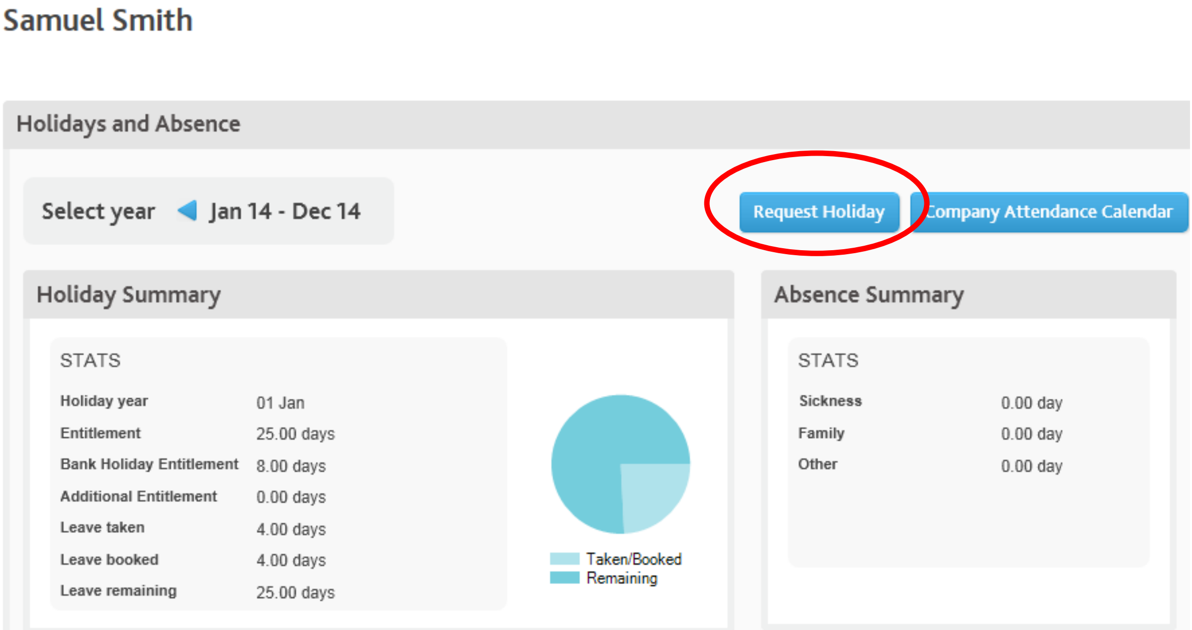


From here an employee can request holiday and "Other" type absence.

By hovering over an entry on the calendar a yellow box opens with a description of the entry.

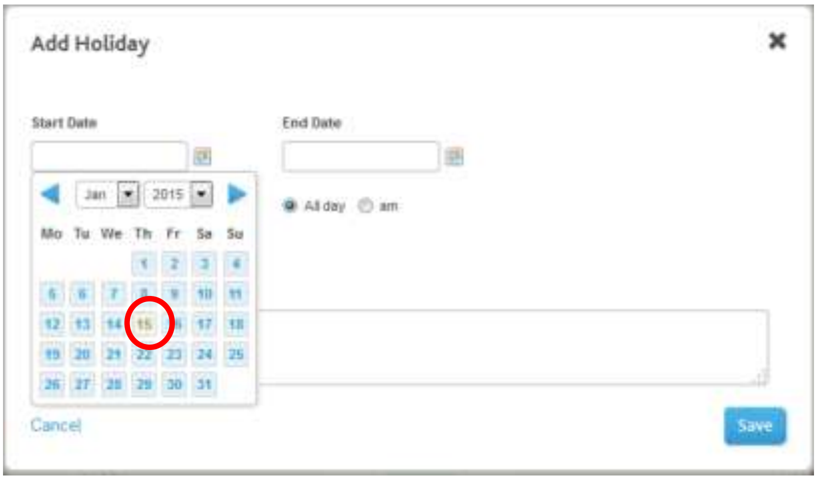


To request a holiday: Click **Request Holiday**

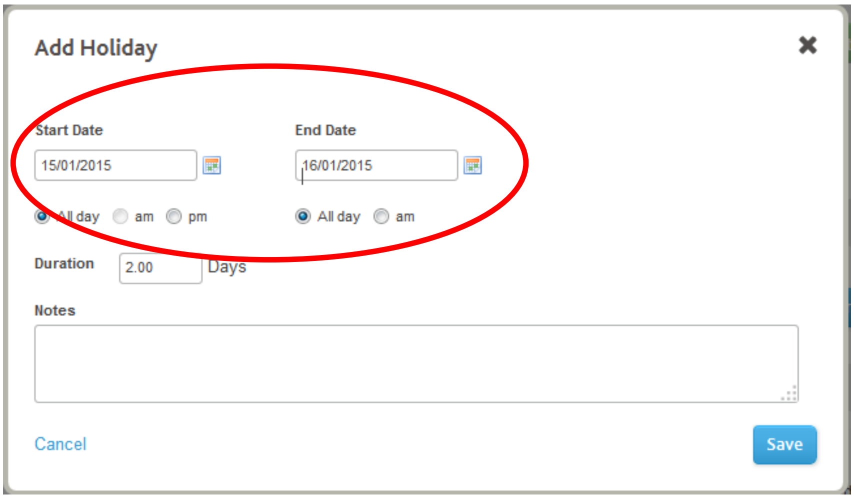


The holiday booking screen appears

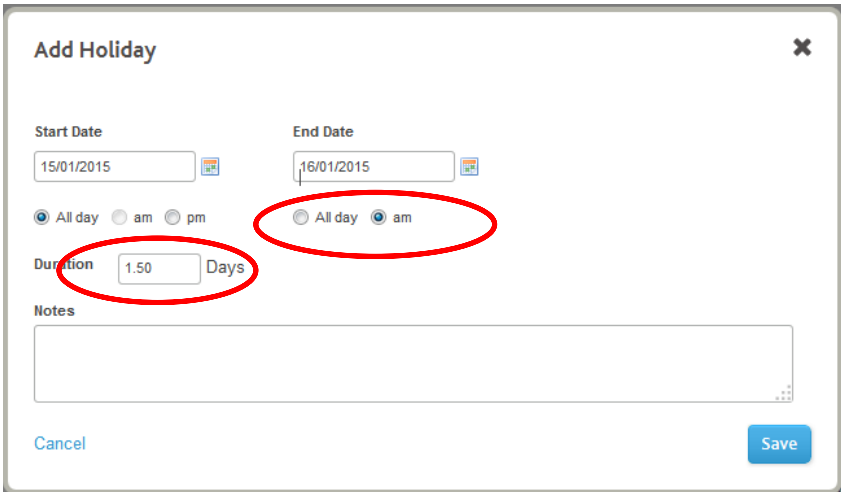
To select the dates, click on the calendar icon.



Select a date for the start of the holiday then do the same for the finish date:



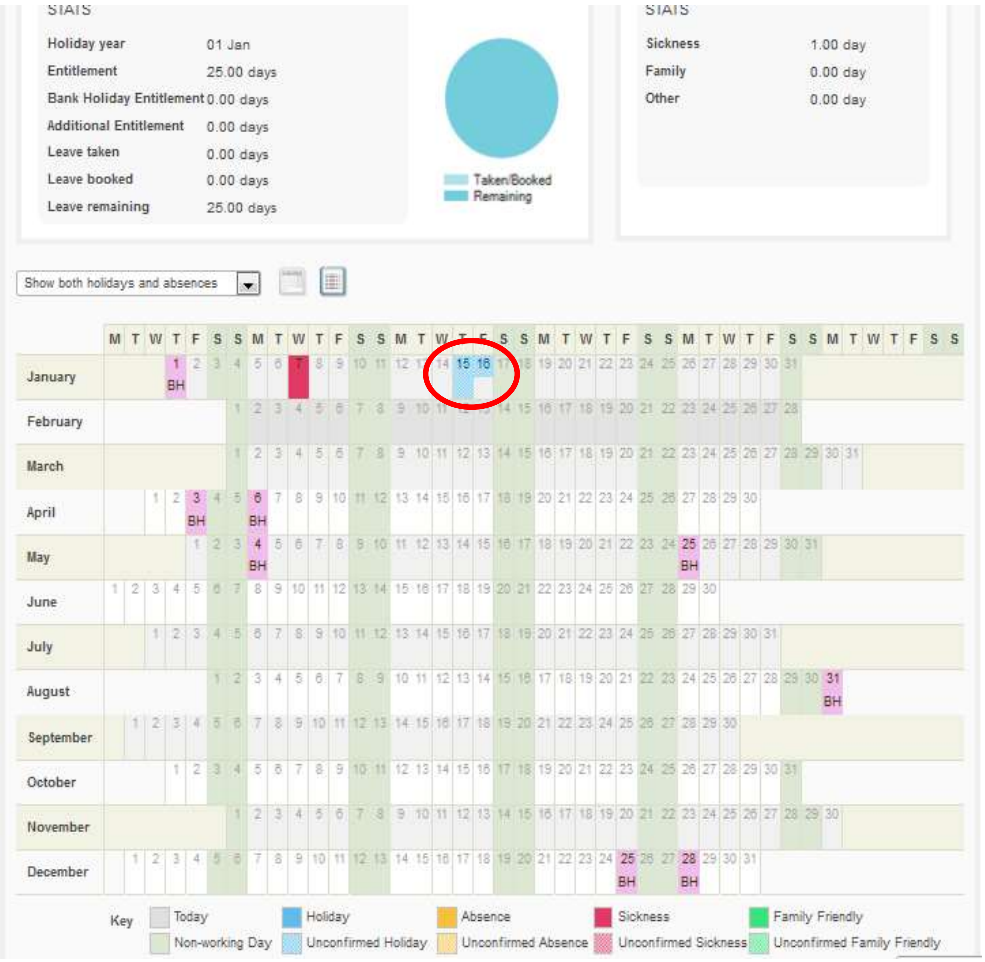
You can also select the start or finish date to be a half day which affects the duration



You can enter a note in the "Notes" box if desired.

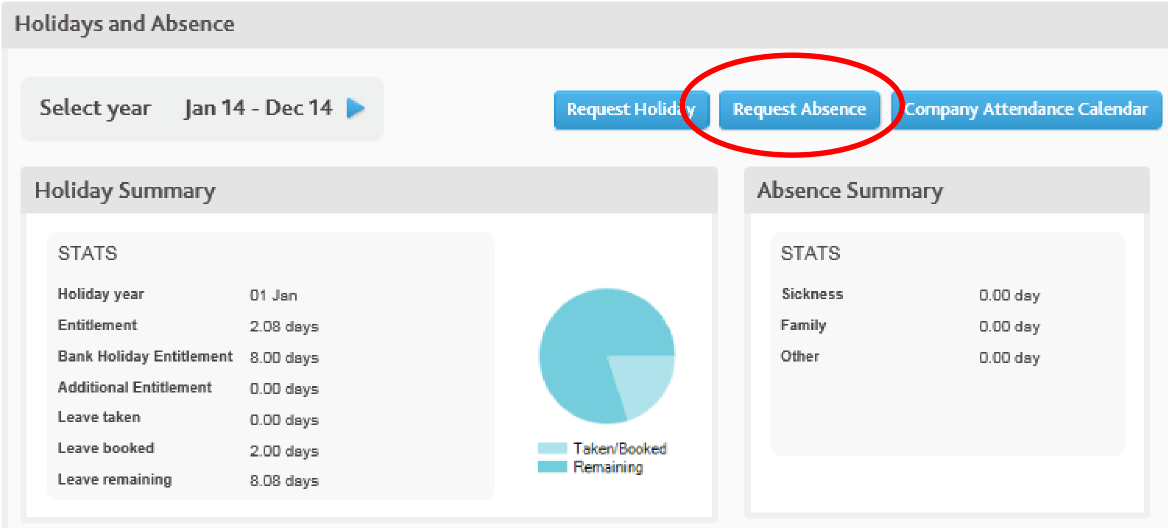
Click on **Save**

Once the holiday has added, the holiday show as a light blue “Requested holiday” on the calendar



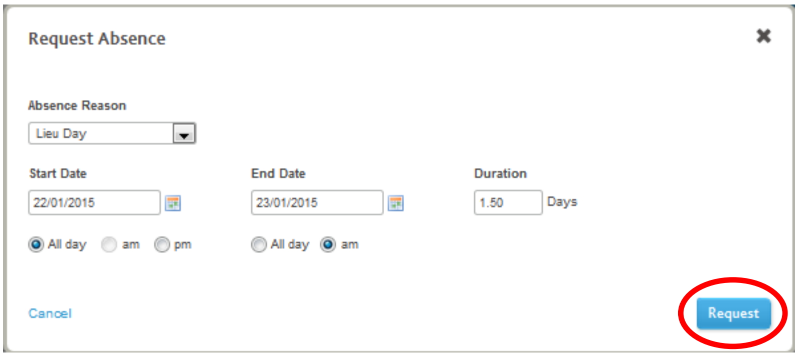
If the relevant permission is granted, the employee may additionally Request absences within the category of “Other”.

Click **Request absence**

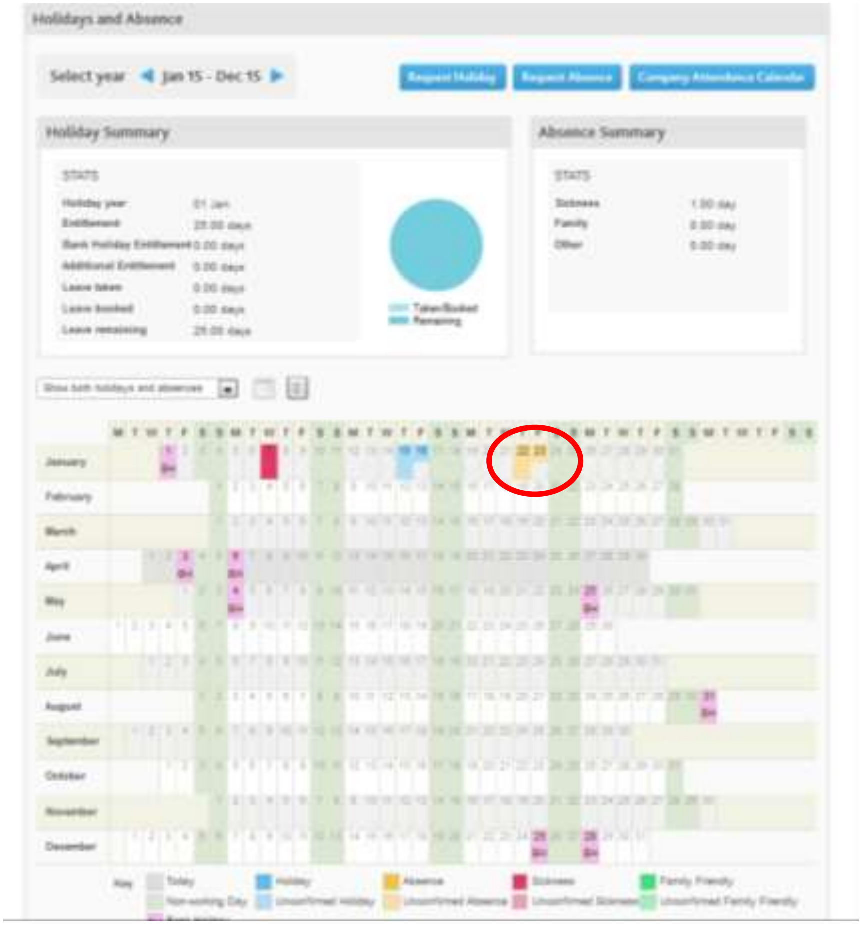


Now click on the absence reason and select the reason for the absence

Next select the start and finish date of your absence in the same way as for a holiday request. Again you may specify a half day



Click **Request**



The absence is now displayed in light orange

You can also request a holiday or an absence by clicking on the desired date directly on the calendar

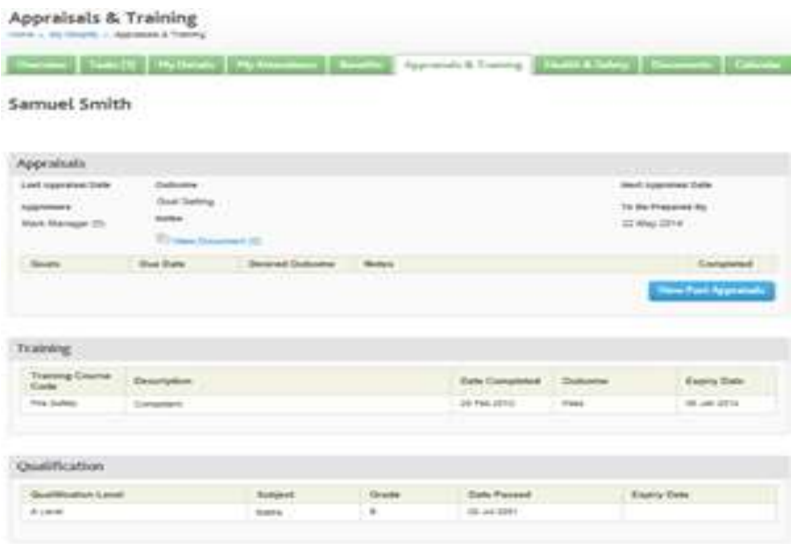
Benefits

This is where the information relating to any benefits an employee has with the Company is recorded and managed. This will vary from company to company as to whether there any benefits and what they are. In the example below we have shown how a Healthcare benefit would be recorded.

This is “Read only” for an employee

The Administrator user can edit Benefits and create ‘other benefits’ which are relevant.

Appraisals and Training



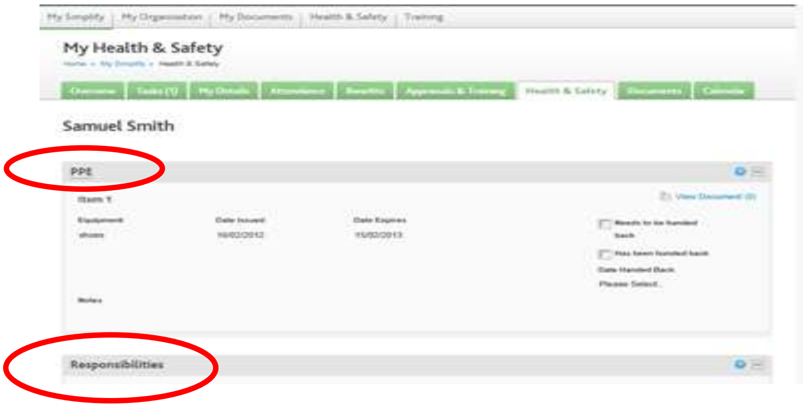
Appraisal, training and qualification information may be recorded within this section.

Training – creating and maintaining training records is important. Tasks and Reminders can be set to notify the assignee when a training qualification is to be renewed.

Qualifications – functionality as above.

Health and Safety

Personal Protection Equipment (PPE), managerial health and safety responsibilities and occupational health information can be logged and viewed in this area.

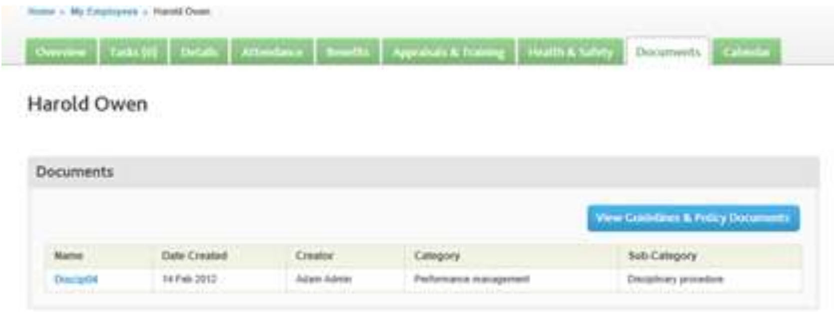


Personal Protection Equipment (PPE) can be logged here and logged when returned.

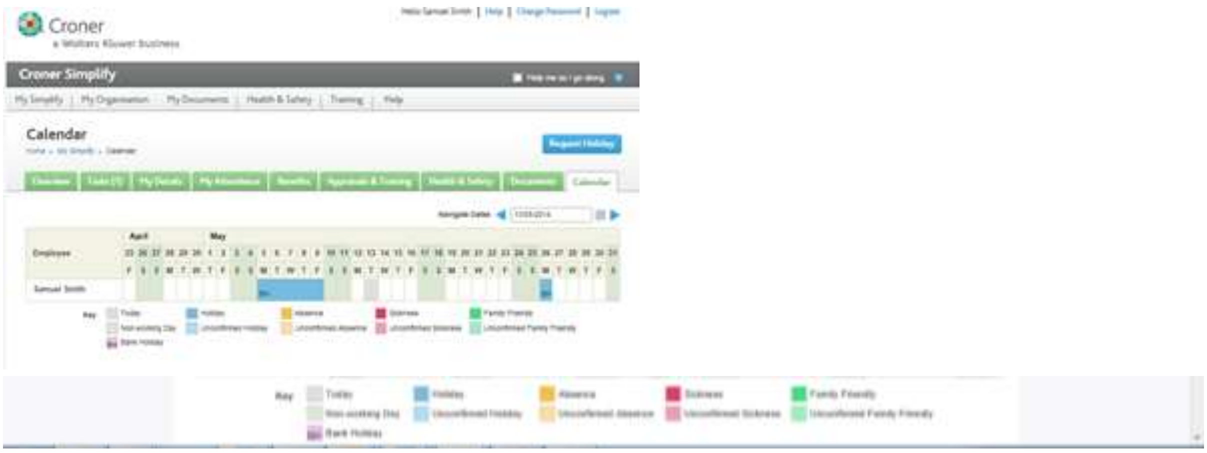
Health and Safety responsibilities can be assigned to Administrators, Managers or employees within the Organisation e.g. Supervisor, Health and Safety Officer. This will in turn create the H&S Organisation Chart [See Organisation and Responsibilities section within the Health and Safety section].

Documents

Here you can view any documents that have been issued to you. You can also access company guidelines and policy documents that your Manager or Administrator may have instructed you to view. Simplify will record that you have viewed the document.



Calendar



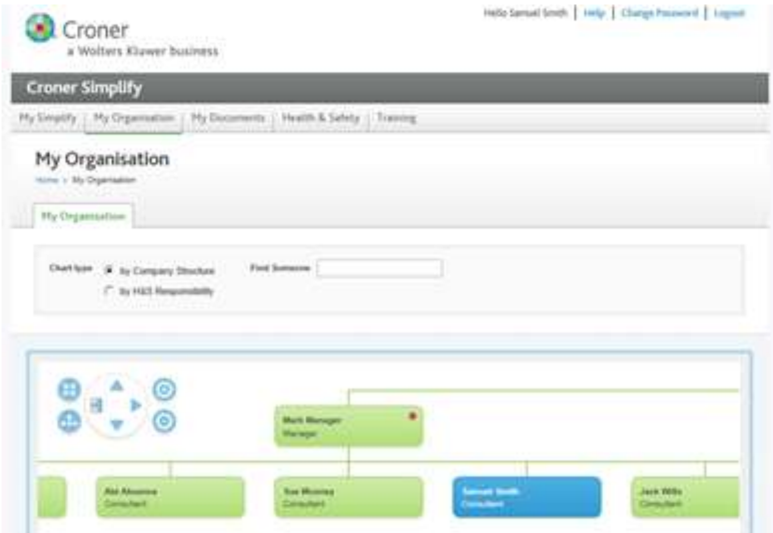
Here you can view the Attendance Calendar which is another place you can request holiday.

My Organisation

My Organisation is the area where the Administrator is able to view and amend the organisational chart.

My Organisation

- Click on **My Organisation** tab and an organisation chart will be displayed in the first tab



- Where an organisation uses Time and Attendance to clock in and out, a red dot against a name indicates that the employee has not clocked in

The organisation chart is automatically created when reporting lines are set within an employee record.

Documents

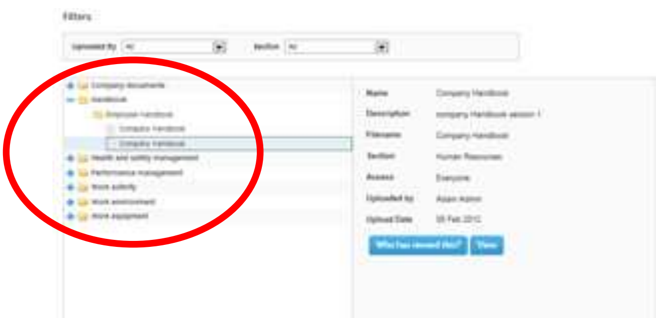
Simplify helps manage and deploy a range of business documents, Company Guidelines & Policies or any other document that need to be sent to employees or viewed on line by self-service employees.

Guidelines and Policies

The Guidelines and Policies area is where the company-wide Policies and Procedures are located, e.g. Employee Handbook, Health & Safety policies, etc.

To view a Guideline or Policy document.

- Click the **blue plus sign** to expand the section
- Click the **folder name** to expand the sub-section
- Click the **document** to see the preview pane on the right-hand side of the screen



- Click **View**
- Click **Open**

- The document will open Read-Only in the AceOffix document management software plug-in (this can be downloaded on first use)

The Employee Profile can only Download or View a document in Read-Only mode

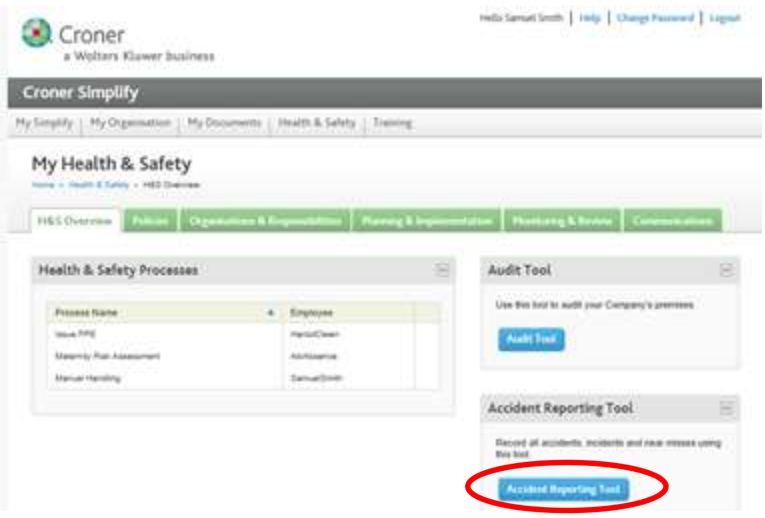
Health & Safety

This tab contains useful information and advice on matters relating to health and safety. Some of the information is for subscribed users only however the Accident Reporting tool is available for everyone.

Accident Reporting Tool

The Accident Reporting tool can assist in the reporting of accidents, dangerous occurrences, diseases and near misses in the workplace. By guiding users through a series of questions, it will help identify what is reportable under the Reporting of Injuries, Diseases and Dangerous Occurrences Regulations 1995 (RIDDOR).

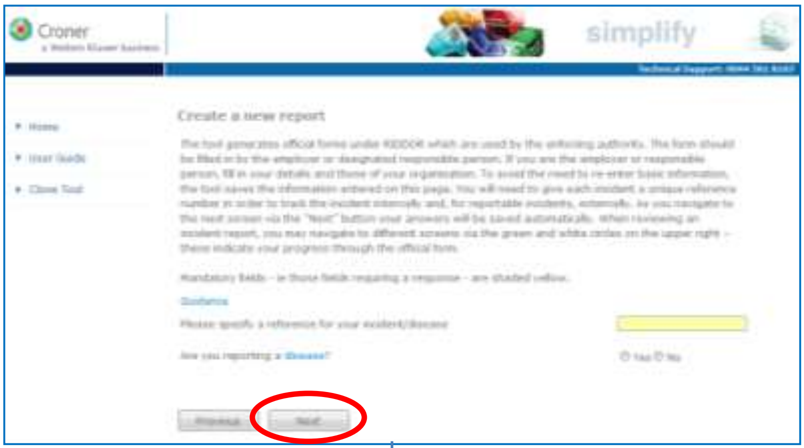
- Click on **H&S Overview** tab
- Click on the **Accident Reporting Tool** button

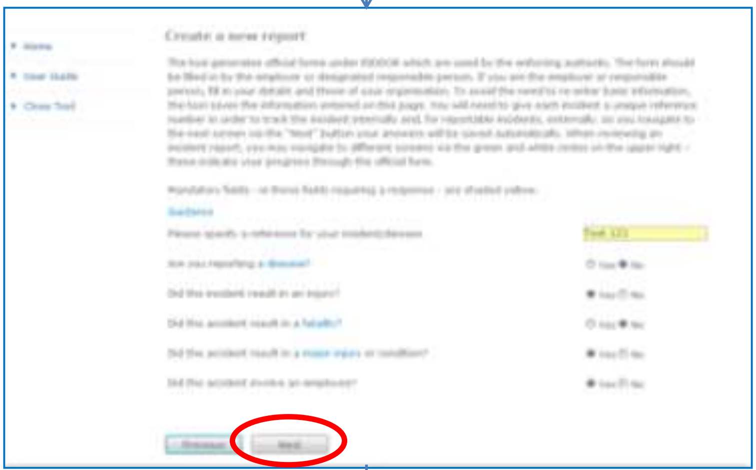


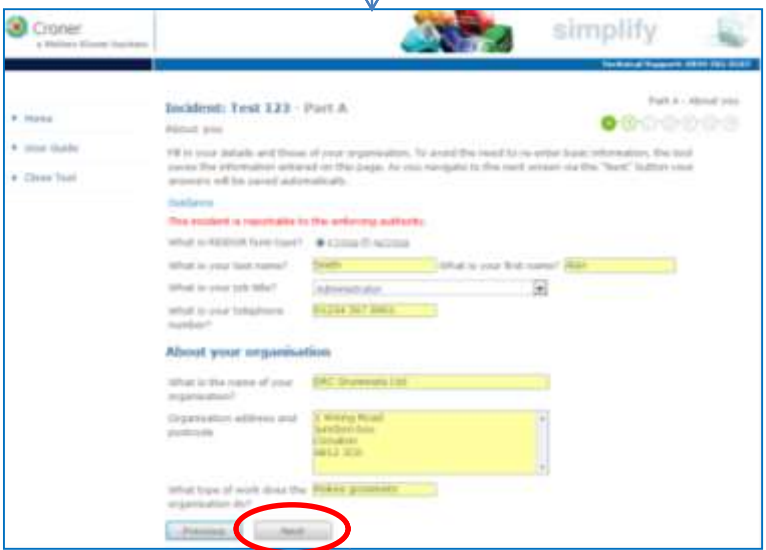
- A separate window opens up
- Click on **Create a new report** button

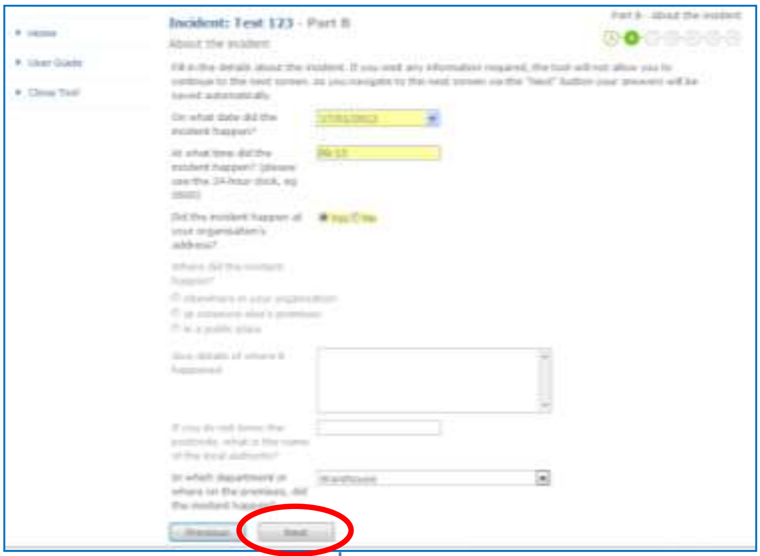
- The report must be completed step by step

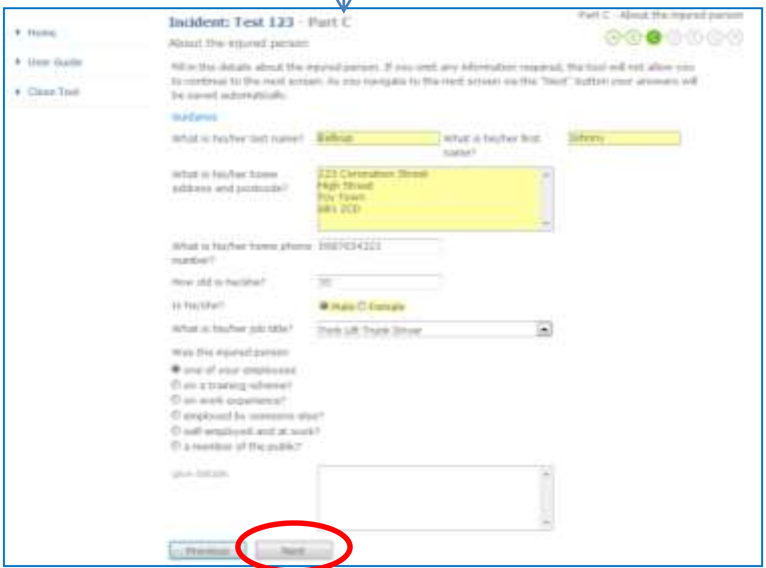
- Complete the appropriate options and click **Next** to proceed to the next screen

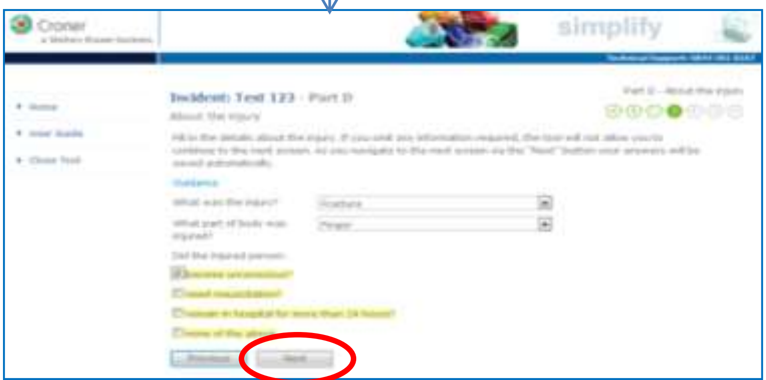


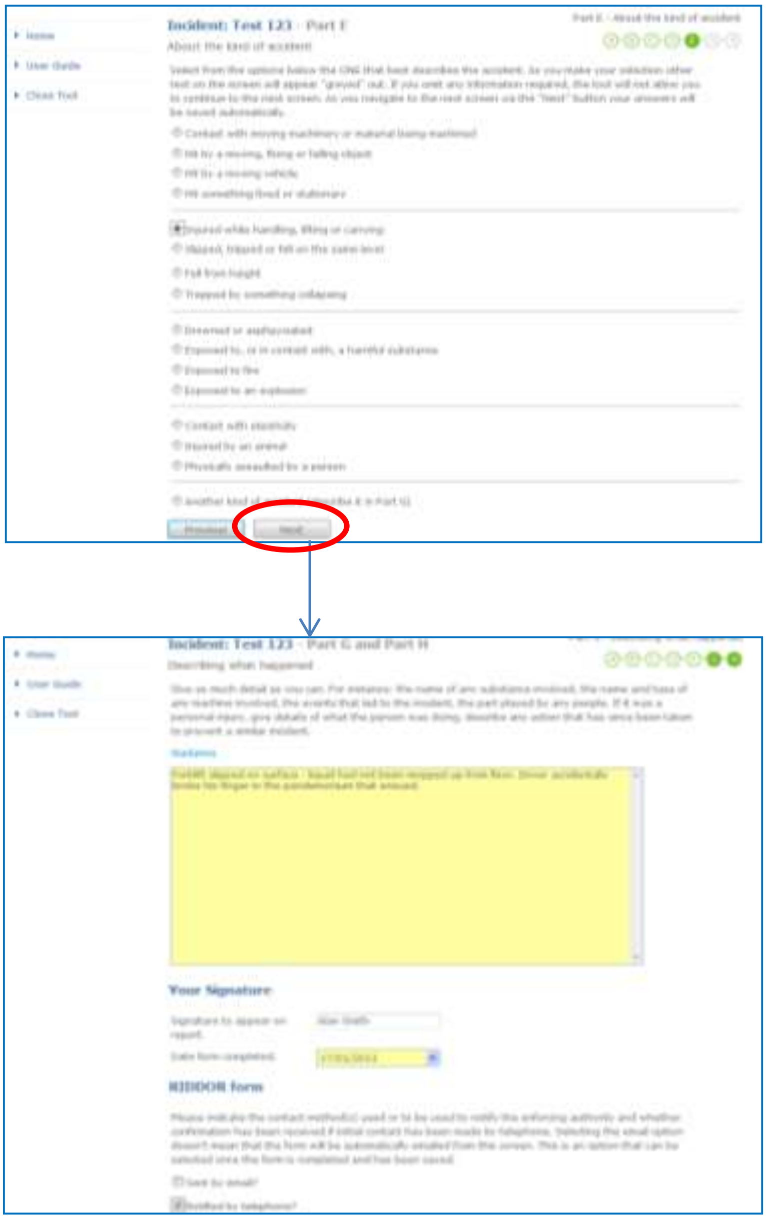




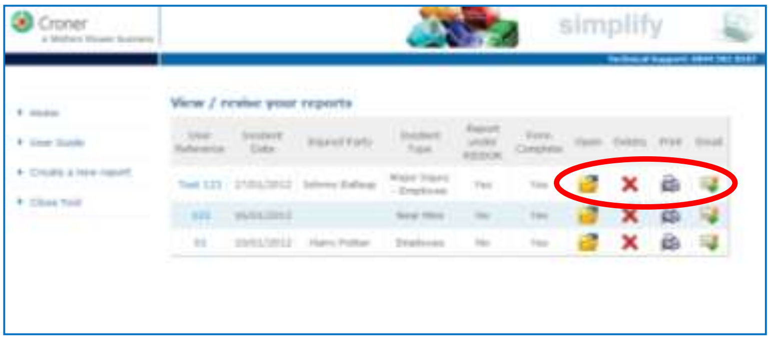

Incident: Test 123 - Part B
About the incident
Home
User Guide
Close Tool


Incident: Test 123 - Part C
About the injured person


Croner
simplify
Incident: Test 123 - Part D
About the injury



- After completing click on **Save/Finish**
- Click on the **Print** icon to print the report off in pdf format and send it to the appropriate authorities
- Alternatively click on the **Email** icon to email the report



- An example of what a report will look like is shown below

Report of an injury or dangerous occurrence

Filling in this form
This form must be filled in by the employer or other responsible person

Part A

About you

1 What is your full name?

Alan Smith

2 What is your job title?

Administrator

3 What is your telephone number?

01234 567 8901

About your organisation

4 What is the name of your organisation?

DRC Grommets Ltd

5 What is its address and postcode?

1 Wiring Road
Junction box
Circuiton
AB12 3CD

6 What type of work does the organisation do?

Makes grommets

Part B

Part C

About the injured person

If you are reporting a dangerous occurrence, go to Part F.

If more than one person was injured in the same incident, please attach the details asked for in Part C and Part D for each injured person.

1 What is their full name?

Johnny Ballsup

2 What is their home address and postcode?

123 Coronation Street
High Street
Toy Town
AB1 2CD

3 What is their home phone number?

0987654321

4 How old are they?

35

5 Are they

- [x] male ?
- [ ] female ?

To modify your report click on the 'User Reference' number.

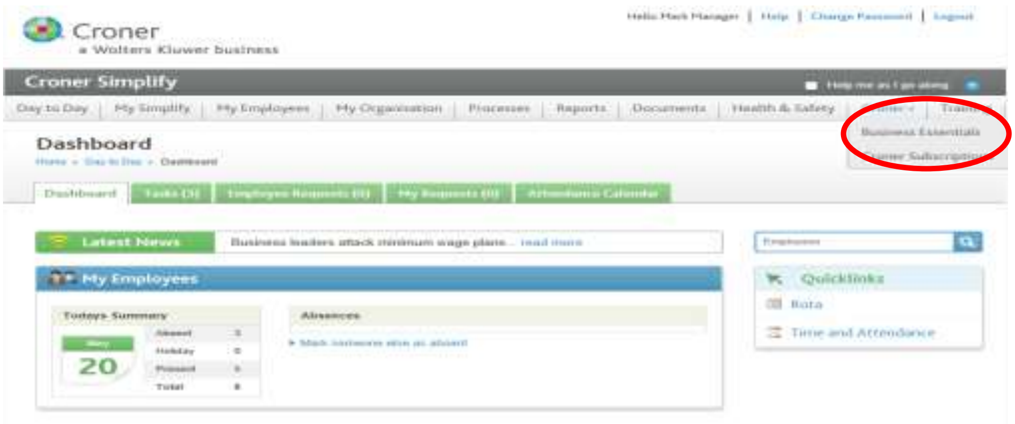
Croner-*i*

Croner I is an online information tool for businesses. An employee can access this if they have been given this permission.

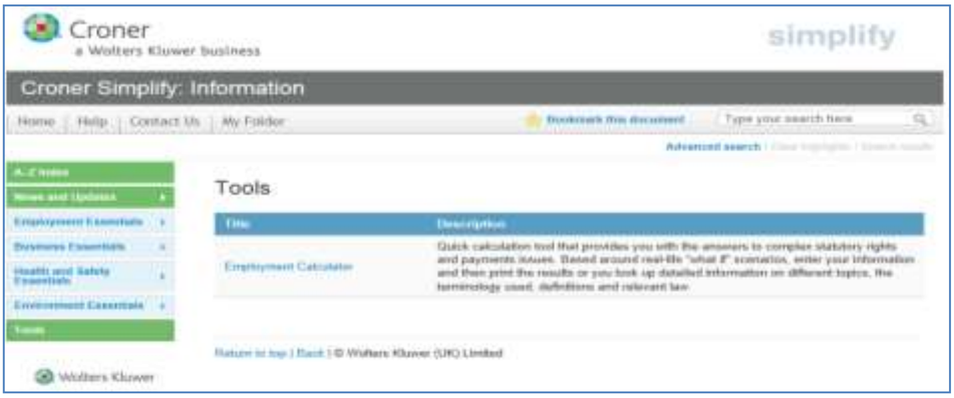
There is data on employment, health and safety, environment and tax and legal matters. Business Essentials is updated weekly and contains Quick Facts, In-depth and Step-by-step guides. It has been written specifically with non-HR professionals in mind and is fully searchable.

- Click on the **Croner-I** tab

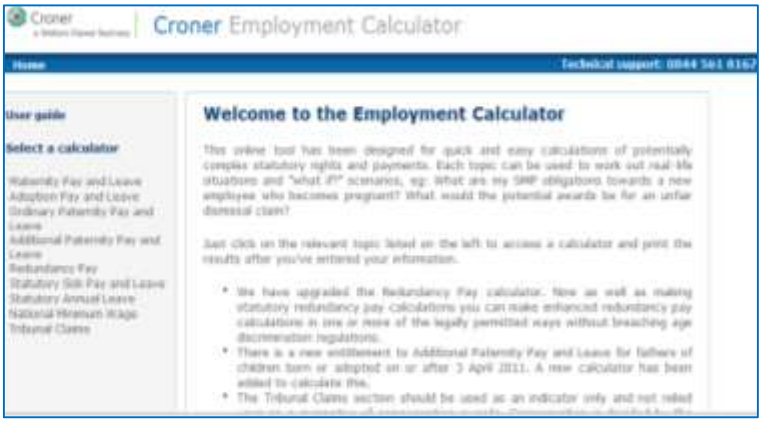
Click **Business Essentials**



- A separate window appears
- Click on **Tools** in the left hand side bar
- Click on **Employment Calculator**



- Select the appropriate calculator to work out maternity pay, redundancy pay, sick pay and National Minimum wage



Training

Within this tab there are Training lessons for you to use for your information.