

Croner Simplify

~ Manager Training Workbook ~

Version 5.0

Manager View

Managers can see information about themselves and their teams. Their role within Croner Simplify is to complete certain tasks for their teams such as approve holidays, log absences and TOIL and accept/reject change requests and manage tasks; and managers may also be given permissions to be able to complete processes.

Therefore, a manager's range of permissions and allowances are somewhat less than an admin profile, but more than those of an employee profile.

Objectives

- Execute Employee procedures - view individuals leave entitlement, view team holiday calendar, request holiday, request personal detail change, view tasks and documents for reporting employees.
- Execute Manager procedures - Authorise leave requests, record absences, initiate and manage Appraisal process for reporting employees
- Authorise employee detail changes, searching for employees for reporting employees.
- Documents - View standard policies and guidelines, view personal documents, customise mail merge documents
- View and Edit the Company Organisation Chart
- Create tasks for reporting employees
- Access Health and Safety tools if relevant permission granted
- Use Croner-I if relevant permission granted
- Run standard reports on reporting employees.

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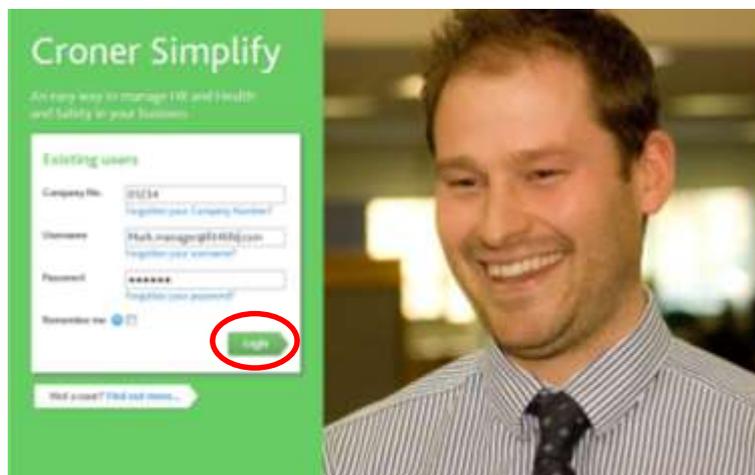
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Navigation

This section will assist you in navigating around Croner Simplify.

Logging In & Out

1. Logging In
 - Go to the following website www.cronersimplify.co.uk
 - The following screen appears



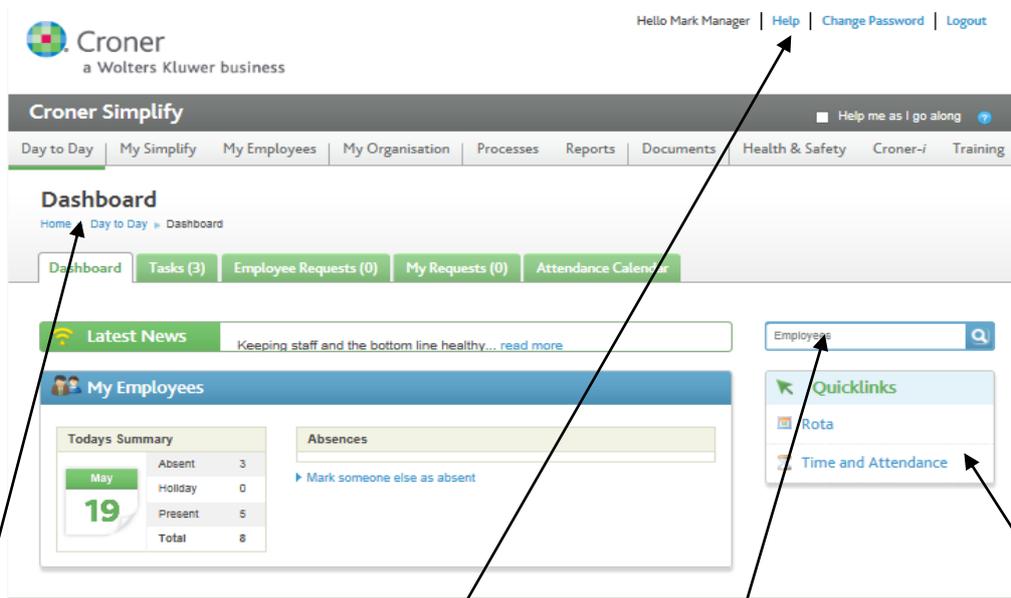
- Fill in the relevant details and click Login
2. Logging Out



Click

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

Use **Search** to locate employees or documents

The **Quicklinks** section identifies shortcuts and other available services



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

Overview of Tabs



Day to Day – Overview of day to day tasks e.g. employee requests. Contains a live ticker feed from Croner-i of useful business news. A Quicklinks box enables the user to access key areas of the system without searching for them. My Employees shows a summary of your team’s attendance for the day and you can quickly mark someone as absent from here.

My Simplify – Provides access to the manager’s personal record.

My Employees – View the screens of your employees, enabling you to access employee information.

My Organisation– View a graphical display of your organisation.

Processes – A set of linked steps to help you manage certain statutory work flows.

Reports – A reporting tool to help analyse staff attendance, pay and general employment issues. (This tab will only be displayed if you have been given Manager access rights).

Documents – A storage place for uploading important documents, notifying staff about them and monitoring who has read them. (This tab will only be displayed if you have been given the appropriate access rights).

Training – Videos and presentational material on Health and Safety and Tax issues.

Help – Provides guidance and assistance on using Simplify.

Health and Safety – A tab will appear if permission to access this area has been given to the Manager by the Administrator User. Policy, procedure and risk assessment documentation as well as the audit and accident reporting tools.

Croner- i – A tab will appear if permission to access this area has been given to the Manager by the Administrator User. Links to Croner I business information and Croner subscription only services.

Day to Day

This area provides quick access to various parts of the system

Latest News

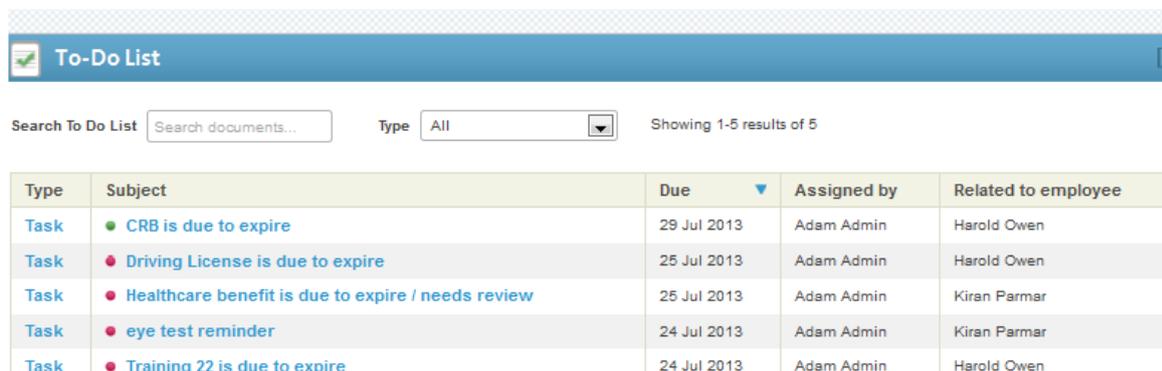
This shows up-to-date information and articles on key HR and health and safety matters.

My Employees

This provides a summary of employee attendance statistics. Absences may be logged from here. Holiday and absence are covered later in the manual.

To-Do List

This highlights priority tasks and actions to be completed. These are generated from specific areas such as the employee record or processes. The list can be ordered by due date in ascending or descending order as preferred. Clicking on any task will open at the correct page in the task tab enabling users to work on and complete them.



Type	Subject	Due	Assigned by	Related to employee
Task	● CRB is due to expire	29 Jul 2013	Adam Admin	Harold Owen
Task	● Driving License is due to expire	25 Jul 2013	Adam Admin	Harold Owen
Task	● Healthcare benefit is due to expire / needs review	25 Jul 2013	Adam Admin	Kiran Parmar
Task	● eye test reminder	24 Jul 2013	Adam Admin	Kiran Parmar
Task	● Training 22 is due to expire	24 Jul 2013	Adam Admin	Harold Owen

Processes in Progress

View and navigate to the latest three processes started for employees e.g. Appraisal.



Process Name	Employee	
Disciplinary Investigation	Ali Asencio	MANAGE
Appraisal Steps	Yarnal Smith	MANAGE
Probation	Harold Owen	MANAGE

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). The creation of tasks will be covered in the relevant sections of this manual.

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

The screenshot shows a web interface with a navigation bar containing 'Dashboard', 'Tasks (3)', 'Employee Requests (0)', 'My Requests (0)', and 'Attendance Calendar'. Below the navigation bar is a 'Filters' section with several dropdown menus: 'Type' (set to ALL), 'Creator' (set to ALL), 'Status' (with checkboxes for Open, Closed, Pending), 'Category' (set to ALL), 'Assigned' (set to Manager, Mark), 'Related To' (set to ALL), 'Show' (set to ALL), and 'Due Date' (set to ALL). Below the filters is a 'List Tasks' section showing 1-3 results of 3. The table has columns: Due, Type, Title, Assigned To, Related To, Category, and Select. Two rows are visible, both for '10 Jan 2012' with 'Work Documents' type and 'Driving License' title. The first row is assigned to 'Mark Manager' and related to 'Paul Joules'. The second row is assigned to 'Mark Manager' and related to 'Mark Manager'. The second row has a 'New' indicator. Blue arrows point from the 'Type', 'Creator', 'Category', 'Assigned', 'Related To', and 'Due Date' filters to explanatory boxes below.

Type -
Subject of task

Creator -
User who created the Task

Category -
Employment or Health and Safety

Assigned -
User the task is assigned to

Related to -
Employee related to the task

Due Date -
Identifies when tasks are due

Managers may filter on the **Assigned** drop down item to view tasks assigned to their reporting employees.

Employees will only see tasks assigned to themselves.

Client 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.

List Tasks Showing 1-7 results of 7

Due	Type	Title	Assigned To	Related To	Category	Go to	Select
24 Jul 2013	Appraisal	● Training I11 is due to expire New	Abi Absence	Jane Sampson	Employment	→	<input type="checkbox"/>
24 Jul 2013	Appraisal	● Training 22 is due to expire	Abi Absence	Harold Owen <i>Left</i>	Employment	→	<input type="checkbox"/>
25 Jul 2013	Other Right To Work	● Driving License is due to expire	David Trainer	Harold Owen <i>Left</i>	Employment	→	<input type="checkbox"/>
25 Jul 2013	Benefits	● Healthcare benefit is due to expire / needs review	Abi Absence	Kiran Parmar	Employment	→	<input type="checkbox"/>
26 Jul 2013	Leaver	● Review entitlements before employees final day New	Adam Admin Left	Harold Owen <i>Left</i>	Employment	→	<input type="checkbox"/>
01 Nov 2013	Other Right To Work	● Passport is due to expire	Sue Mooney	Harold Owen <i>Left</i>	Employment	→	<input type="checkbox"/>
12 Jul 2014	Appraisal	● Training FA3 is due to expire New	Abi Absence	Abi Absence	Employment	→	<input type="checkbox"/>

Tasks will automatically appear in the list on their active date although for Client generated tasks users can create a reminder which over rules this date.

Tasks that are not yet due can only be viewed if you select **Pending**

Click on a task to open and view the detail.

01 Nov 2013	Other Right To Work	● Passport is due to expire	Sue Mooney	Harold Owen <i>Left</i>	Employment	→	<input type="checkbox"/>
12 Jul 2014	Appraisal	● Training FA3 is due to expire New	Abi Absence	Abi Absence	Employment	→	<input type="checkbox"/>

Training FA3 is due to expire

Creator Mr Adam Admin	Date Created 30 Jul 2013	Original Assignee Abi Absence
Assigned To Abi Absence	On 30 Jul 2013	By Mr Adam Admin

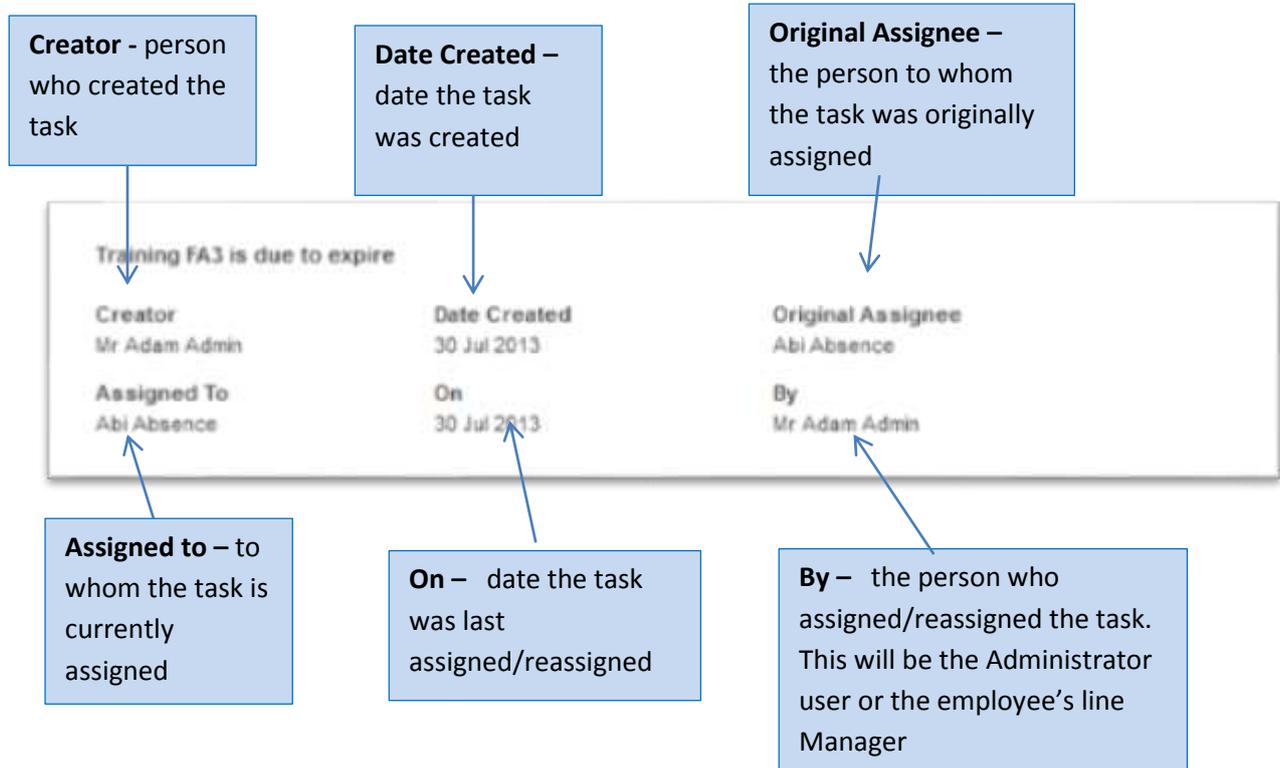
Reminder

Reminder Start Date <input type="text" value="02/06/2014"/>	Reminder Frequency <input type="text" value="Once A Week"/>	<input type="button" value="Delete Reminder"/>
---	---	--

Remind me

Completion Comment

Write a message:



Simplify allows the user to set reminders which will send e-mail prompts to the Assignee and, if required, the Creator. These reminders will start on the stipulated date and re-occur at the set frequency.

01 Nov 2013	Other Right To Work	Passport is due to expire	Sue Mooney	Harold Owen Leit	Employment	→	☐
12 Jul 2014	Appraisal	Training FA3 is due to expire New	Abi Absence	Abi Absence	Employment	→	☐

Training FA3 is due to expire

Creator Mr Adam Admin	Date Created 30 Jul 2013	Original Assignee Abi Absence
Assigned To Abi Absence	On 30 Jul 2013	By Mr Adam Admin

Reminder

Reminder Start Date:

Reminder Frequency:

Remind me

Completion Comment

Reminder

Reminder Start Date: 02/06/2014

Reminder Frequency: Once A Week

Remind me

Delete Reminder

Save

Allows Reminder e-mail to be sent to the Creator of the Reminder

The date of the initial email Reminder for this task

The frequency of the reminder

Allows the Administrator user or line Manager to delete the Reminder

Save and activate the Reminder.

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.

01 Nov 2013	Other Right To Work	Passport is due to expire	Sue Mooney	Harold Owen Ltd	Employment	→	🗑️
12 Jul 2014	Appraisal	Training FA3 is due to expire New	Abi Absence	Abi Absence	Employment	→	🗑️

Training FA3 is due to expire

Creator: Mr Adam Admin Date Created: 30 Jul 2013 Original Assignee: Abi Absence

Assigned To: Abi Absence On: 30 Jul 2013 By: Mr Adam Admin

Reminder

Reminder Start Date: 02/06/2014 Reminder Frequency: Once A Week **Delete Reminder**

Remind me

Save

Completion Comment

Write a message

Reassign Task **Mark as Complete**

Bulk Reassign **Bulk Complete**

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

Reassign Task [X]

This will change the person who is assigned to complete this task. You will only be able to reassign a task to a self service user.

Assign To: Samuel Smith (18) Comments: How First Aider

Cancel Reassign

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.

Note details of the Task now identify the latest Assignee in addition to the original Assignee.

Training FA3 is due to expire

Creator Mr Adam Admin	Date Created 30 Jul 2013	Original Assignee Abi Absence
Assigned To Samuel Smith	On 30 Jul 2013	By Mr Adam Admin

Reminder

Reminder Start Date: 02/06/2014 [Calendar icon] Reminder Frequency: Once A Week [Dropdown] **Delete Reminder**

Remind me

Save

Completion Comment

Write a message: [Text area]

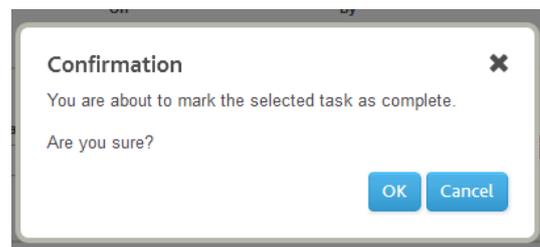
Reassign Task **Mark as Complete**

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 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 available.

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.

List Tasks Showing 1-6 results of 6

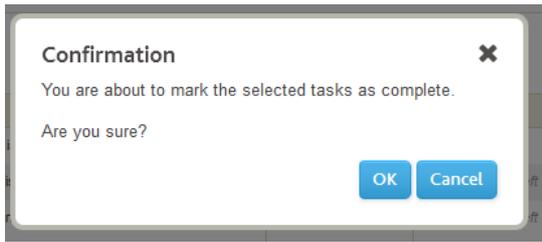
Due	Type	Title	Assigned To	Related To	Category	Go to	Select
24 Jul 2013	Appraisal	● Training I11 is due to expire New	Abi Absence	Jane Sampson	Employment	→	<input type="checkbox"/>
24 Jul 2013	Appraisal	● Training 22 is due to expire	Abi Absence	Harold Owen <i>Left</i>	Employment	→	<input checked="" type="checkbox"/>
25 Jul 2013	Other Right To Work	● Driving License is due to expire	David Trainer	Harold Owen <i>Left</i>	Employment	→	<input checked="" type="checkbox"/>
25 Jul 2013	Benefits	● Healthcare benefit is due to expire / needs review	Abi Absence	Kiran Parmar	Employment	→	<input checked="" type="checkbox"/>
26 Jul 2013	Leaver	● Review entitlements before employees final day	Adam Admin Left	Harold Owen <i>Left</i>	Employment	→	<input type="checkbox"/>
01 Nov 2013	Other Right To Work	● Passport is due to expire	Sue Mooney	Harold Owen <i>Left</i>	Employment	→	<input type="checkbox"/>



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 complete and remove them from the list.

An employee who has left the company will be identified by the word 'Left'

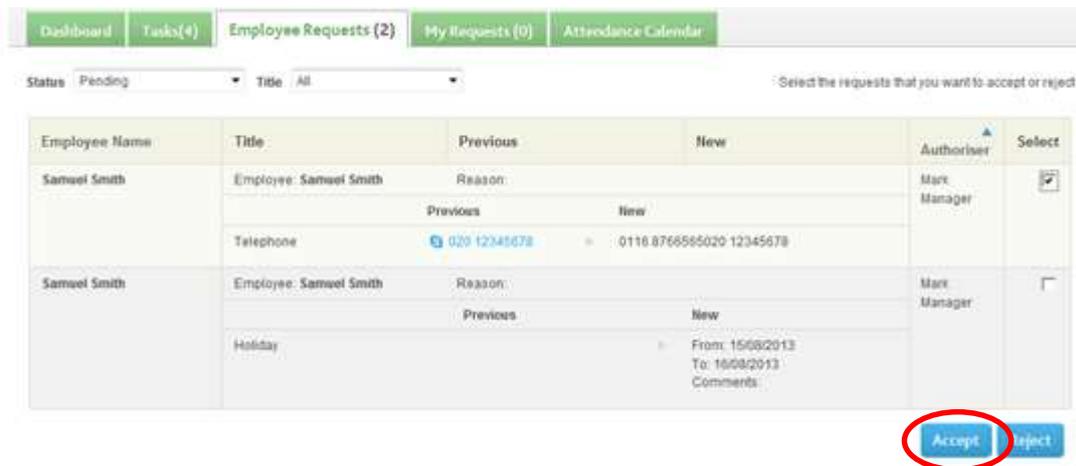
Only Administrator users will see the Related To column

List Tasks Showing 1-6 results of 6

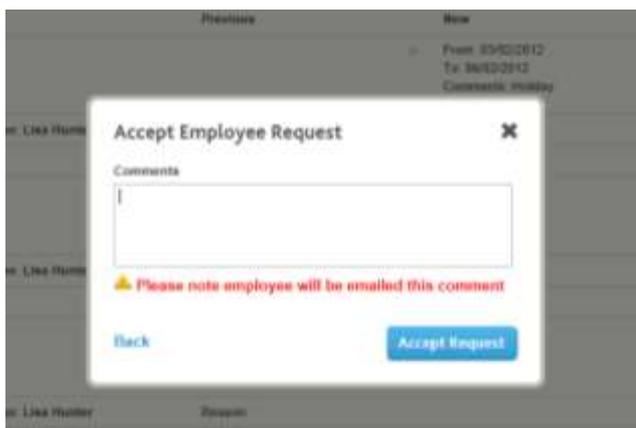
Due	Type	Title	Assigned To	Related To	Category	Select
24 Jul 2013	Appraisal	● Training 111 is due to expire New	Abi Absence	Jane Sampson	Employment	<input type="checkbox"/>
24 Jul 2013	Appraisal	● Training 22 is due to expire	Abi Absence	Harold Owen <i>Left</i>	Employment	<input type="checkbox"/>

Employee Requests

- The Employee Request tab enables you to accept or reject employee requests such as holiday, non-sickness type absences (if employee is enabled to do this) or changes in personal details
- To action an employee request, Place a tick in the **Select** box for the required request and click **Accept** or **Reject**. In this case we shall accept a change of address request



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



My Requests

This area displays holiday and absence requests made by you yourself and awaiting approval by an administrator. Changing any other of your own details shows the request as “Pending”. You can delete any request that has not yet been approved by clicking **Reject**

The screenshot shows the 'My Requests' page with a navigation bar containing 'Dashboard', 'Tasks (4)', 'Employee Requests (2)', 'My Requests (2)', and 'Attendance Calendar'. Below the navigation bar, there is a dropdown menu for 'Status' set to 'Pending'. The main content area features a table with columns: 'Screen Name', 'Title', 'Previous', 'New', and 'Select'. The table contains two rows: 'Employee Holiday Details' and 'Address Details'. The 'Employee Holiday Details' row shows a 'Holiday' request from 08/08/2013 to 09/08/2013. The 'Address Details' row shows a 'Telephone' request with two phone numbers: 01623 7548888 and 01623 554553. A 'Reject' button is circled in red at the bottom right of the table.

Screen Name	Title	Previous	New	Select
Employee Holiday Details	Holiday	Previous	New From: 08/08/2013 To: 09/08/2013 Comments:	<input type="checkbox"/>
Address Details	Telephone	Previous	New 01623 7548888 01623 554553	<input type="checkbox"/>

Defining Work Periods

A default Work Period is pre-populated in the system and this can be used to apply to each Employee’s record. Only the Administrator Profile can set up a new Work Period or adjust the default Work Period.

Assigning a Work Period to an Employee

The default Work Period will automatically be applied to all new employees when they are created on the system.

Once the correct Work Periods are assigned to employees, any holidays that are booked will take account of the employee’s work pattern and the system will only book them off on the relevant days. For example, if a part-time employee (who works Mon-Wed) books a five-day week off in the calendar; their Leave Entitlement will reduce by 3 days, not 5.

Only the Administrator and Administrator Manager profiles can adjust an employee’s work period.

Attendance Calendar

The screenshot shows the Croner Simplify Attendance Calendar interface. At the top, there's a navigation bar with 'Hello Mark Manager' and links for 'Help', 'Change Password', and 'Logout'. Below that, the 'Croner Simplify' logo and a 'Help me as I go along' button are visible. The main navigation menu includes 'Day to Day', 'My Simplify', 'My Employees', 'My Organisation', 'Processes', 'Reports', 'Documents', 'Health & Safety', 'Croner-i', and 'Training'. The 'Attendance Calendar' section is active, showing a calendar for May and June 2014. The calendar grid lists employees and their attendance status for each day. A key at the bottom explains the color-coding: Today (grey), Non-working Day (light green), Bank Holiday (pink), Holiday (blue), Absence (yellow), Sickness (red), Family Friendly (green), Unconfirmed Holiday (light blue), Unconfirmed Absence (orange), Unconfirmed Sickness (light red), and Unconfirmed Family Friendly (light green).

The Attendance calendar shows all the employees' holiday and absences within your team (or in the organisation if set up that way by the administrator). You can book your team's holidays and absences from here either using the blue buttons or by clicking directly on the chosen date in the calendar itself. The calendar can be filtered in various ways and by clicking on a date a user can book a holiday or an absence.

Please note the key at the bottom which helps you identify items on the calendar by colour

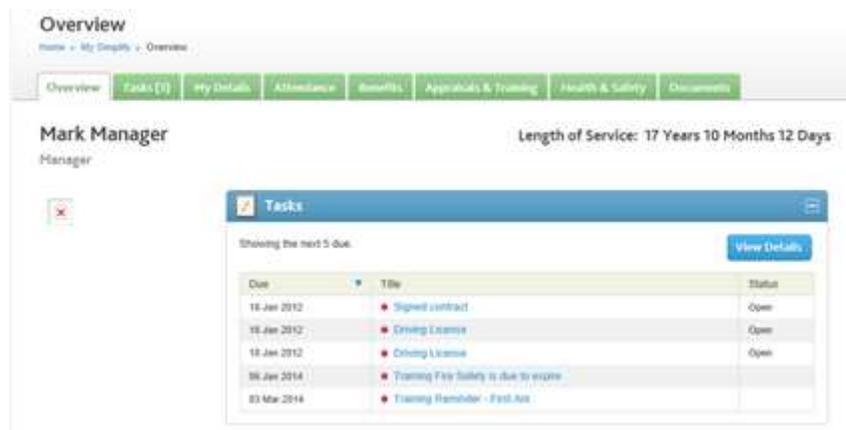
My Simplify

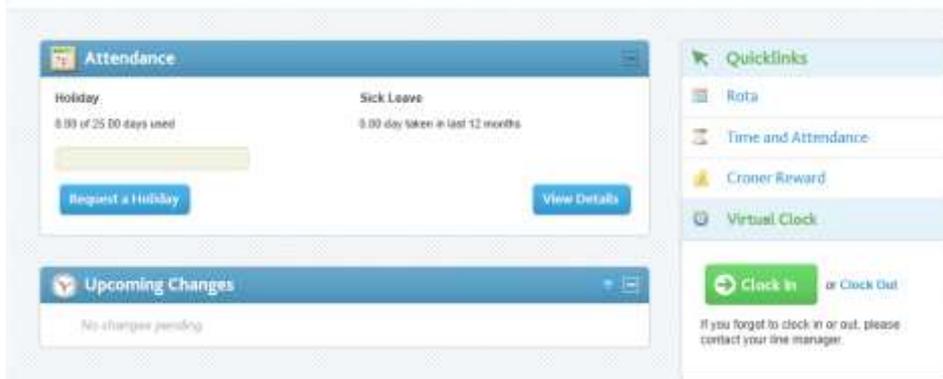
My Simplify contains the manager's personal record.



Overview

The Overview tab is a summary of the current day showing tasks, attendance and upcoming changes. From here the manager can quickly request their own holiday.



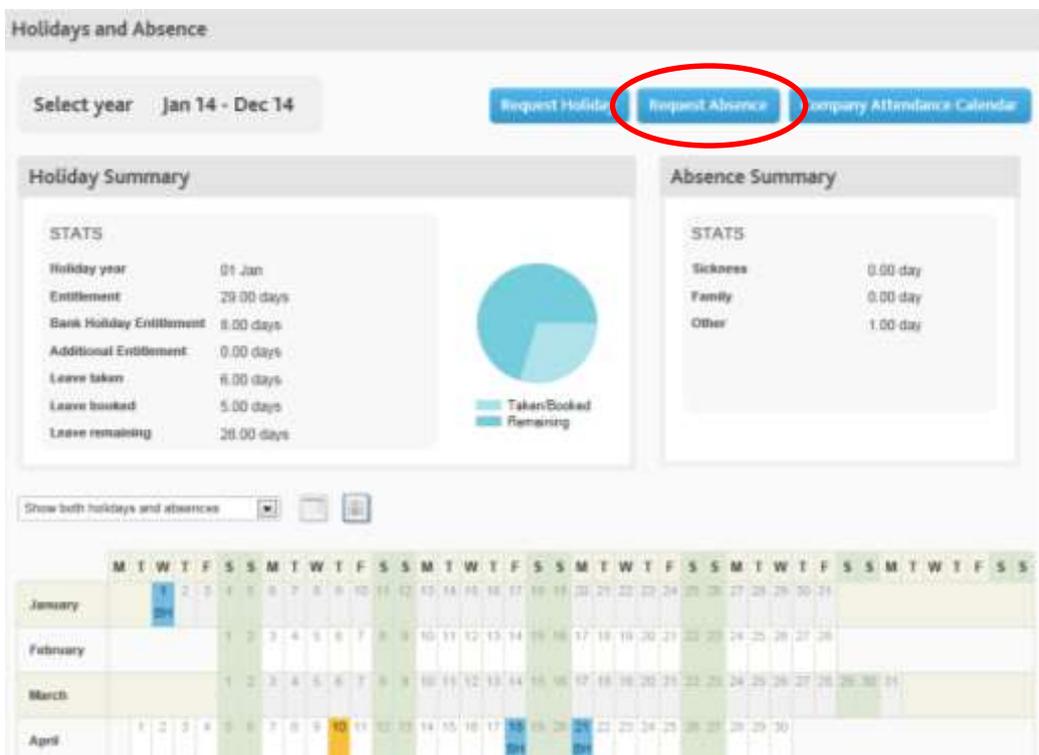


Click on the **Request a Holiday** button and complete the **Start Date** and **End Date** boxes.

When complete click on the **Save** button. This will send an email and an 'Employee Request' to the person who approves the manager's holiday, which will be either accepted or rejected. It will also mark the dates as 'Unconfirmed Holiday' on the managers Simplify Calendar.

When the holiday has been accepted or rejected an email will be sent to confirm or reject and the holiday confirmed or deleted on the calendar.

A manager can also book their own absences from the **Other** category if granted permission



My Employees

The **My Employees** tab provides an overview of the employees contained within the system and allows Administrators and Managers to access an employee's records.

Croner Simplify Help me as I go along ?

Day to Day | My Simplify | **My Employees** | My Organisation | Processes | Reports | Documents | Training

Employees Overview

[Home](#) > [My Employees](#) > Overview

Filter Show more filters Showing 1-8 results of 8 **Action** [Select all](#) | [Clear all](#)

Employee Name begins with... Select action ▾

Employee ID	Employee Name	Department	Location	
1	Samuel Smith	Sales	Head Office	<input type="checkbox"/>
10	Harold Christopher Owen	Sales	Head Office	<input type="checkbox"/>
11	Jack Wills	Sales	Head Office	<input type="checkbox"/>
123	Gemma Louise Copp	Administration	Head Office	<input type="checkbox"/>
13	Sue Mooney	Sales	Head Office	<input type="checkbox"/>
2	Lisa Hunter	Sales	Head Office	<input type="checkbox"/>
59	Jim Smith	Sales and Marketing	Nuffield Road	<input type="checkbox"/>
9	Abi Absence	Sales	Head Office	<input type="checkbox"/>

Action [Select all](#) | [Clear all](#)

Employee Overview

- To select a single employee search by using the **Filter**.

Employee Name begins with... [Show more filters](#) Showing 1-7 results of 7 [Action](#) [Select all](#) | [Clear all](#)

Employee ID	Employee Name	Department	Location	
1	Samuel Smith	Sales	Head Office	<input type="checkbox"/>
10	Harold Christopher Owen	Sales	Head Office	<input type="checkbox"/>
11	Jack Wills	Sales	Head Office	<input type="checkbox"/>
13	Sue Mooney	Sales	Head Office	<input type="checkbox"/>
2	Lisa Hunter	Sales	Head Office	<input type="checkbox"/>

- A list of all of the employees that match the search will be displayed
- Click on the employee's name
- The record opens

The employee's record will be displayed.

Selecting Multiple Users to Update their Records

Several employees' records can be updated in one easy action e.g. Booking holiday for numerous staff.

- Click on **My Employees** tab
- Select various employees from the list

Employees Overview

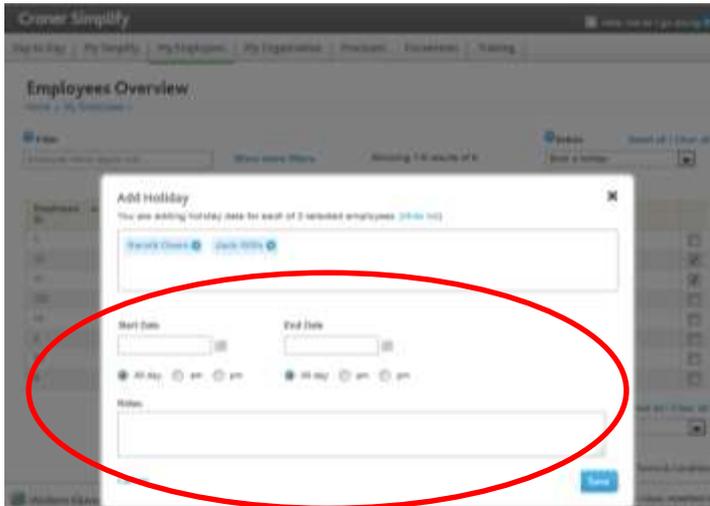
Employee ID	Employee Name	Department	Location	
1	Samuel Smith	Sales	Head Office	
10	Harold Christopher Owen	Sales	Head Office	<input checked="" type="checkbox"/>
11	Jack Wills	Sales	Head Office	<input checked="" type="checkbox"/>

- Click on the **Action Menu**
- Choose **Add a holiday** from the list

Employees Overview

Employee ID	Employee Name	Department	Location	
1	Samuel Smith	Sales	Head Office	<input type="checkbox"/>
10	Harold Christopher Owen	Sales	Head Office	<input checked="" type="checkbox"/>
11	Jack Wills	Sales	Head Office	<input checked="" type="checkbox"/>
123	Gemma Louise Copp	Administration	Head Office	<input type="checkbox"/>

Add a start and end date of the holiday to be booked and any notes required in the relevant areas.



- Click **Save** and the holiday will be booked for the selected employees

Overview

Overview
Home > My Employees > Samuel Smith

Overview | **Tasks (1)** | Details | Attendance | Benefits | Appraisals & Training | Health & Safety | Documents

Samuel Smith
Consultant

Length of Service: 2 Years 4 Months 19 Days

Tasks
Showing the next 1 due. [View Details](#)

Due	Title	Status
13 Dec 2013	Training first aid is due to expire	Open

Attendance

Holiday
0 of 35.00 days used

Sick Leave
3.00 days taken in last 12 months

[Book a Holiday](#) [Record an Absence](#) [View Details](#)

Quicklinks

- Rota
- Croner Reward

Upcoming Changes
No changes pending

- The **overview** allows you to access some of the most commonly used aspects of managing your employee records including booking a holiday and logging an absence.
- Manage any up and coming changes to the employee's record, such as a change of address in a months time.
- You can view any outstanding tasks regarding the employee (which takes you in to the next tab). You can see any upcoming changes scheduled for the employee.

Book a Holiday

You can book a holiday for an employee by accepting a holiday request sent from the employee in the Employee Request tab of the Day to Day page or by clicking directly into the Company calendar on the Calendar tab.

You can book a holiday by clicking on the blue 'Book a Holiday' on the Overview tab of an individual employee's record



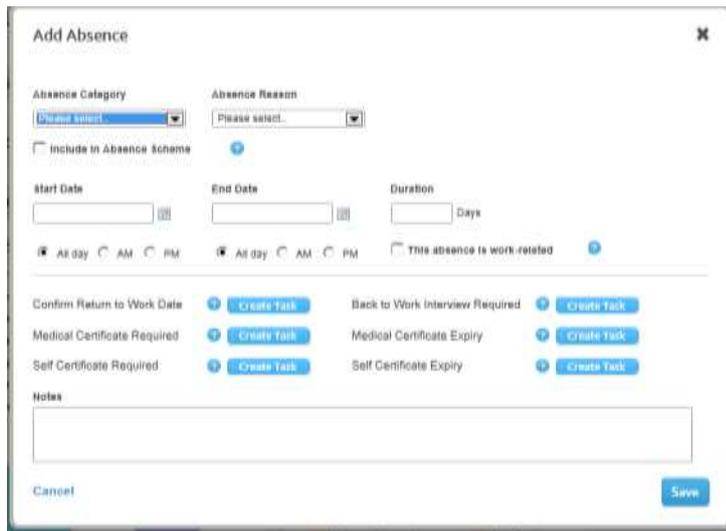
- Click on the blue **Book a Holiday** button
- Add a 'Start Date' and an 'End Date'
- Select one of the radio buttons to indicate 'All Day', half a day AM or half a day PM
- The duration will automatically be calculated taking into account the work pattern of the employee which is set by the Administrator
- Add any relevant notes such as 'Request made by email' and **Save**

- The holiday will appear in blue in the Employee's calendar under the Attendance and on the Team Calendar on the Calendar Tab

Recording and requesting an Absence

Absences may be recorded using the blue link 'Mark Someone as Absent' on the Day to Day Tab or in Overview of an Employee record or by clicking directly into the Company calendar on the Calendar tab. Absences can be amended and tracked from within this area. The absence summary states the level of absence within three categories which are:

- Sickness
- Family friendly
- Other



Select the appropriate category.

A full Administrator is able to add additional absence reasons in if required.

Add Absence

Absence Category: | Absence Reason:

Include in Absence Scheme

Start Date: | End Date: | Duration: Days

All day AM PM |
 All day AM PM

This absence is work-related

Callouts:

- Date absence commenced (points to Start Date)
- Identifies if absence is full or part day (points to AM/PM radio buttons)
- Date absence ended (points to End Date)
- Number of days absent (points to Duration)
- Identifies if absence is work related (points to This absence is work-related checkbox)



The end date of an absence must be populated at the time of recording. If the end date is not known the date can be amended from the Attendance Calendar at a later time.

A Manager user is able to create tasks from this area for themselves or the employee.

Confirm Return to Work Date |
 Back to Work Interview Required

Medical Certificate Required |
 Medical Certificate Expiry

Self Certificate Required |
 Self Certificate Expiry

Notes

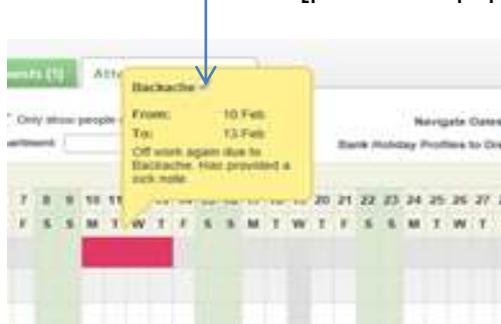
On completion, click Save. The information will be transferred to the attendance calendar and shown in **red** for Sickness, **green** for Family Friendly and **orange** for Other absence. Unconfirmed absences will be reflected in pale versions of these colours.

To edit a task within the Absence area:

Go to Attendance Calendar

Hover mouse over orange area to view absence detail

Click on the edit icon [pencil and paper]



Select Update Task

- Confirm Return to Work Date ? [Update Task](#)
- Medical Certificate Required ? [Create Task](#)
- Self Certificate Required ? [Create Task](#)



Where the end date is amended user will see the following message .

'This absence currently includes one or more associated tasks. As you have amended the absence start or end date please ensure that these tasks are reviewed to confirm they still meet your requirements.'

In addition, Administrator or Manager users are able to record an absence from the Summary area of the Dashboard on the Day to Day tab.

Tasks

Tasks
Home > My Employees > Samuel Smith

Overview Tasks (1) Details Attendance Benefits Appraisals & Training Health & Safety Documents

Samuel Smith

Filters

Type: All Category: All Due Date: All
Creator: All
Status: Open Closed Pending

Select all | Clear all

List Tasks Showing 1-3 results of 3

Due	Type	Title	Category	Select
18 Jan 2012	Work Documents	● Driving License	Employment	<input type="checkbox"/>
18 Jan 2012	Work Documents	● Driving License New	Employment	<input type="checkbox"/>
18 Jan 2012	Work Documents	● Signed contract New	Employment	<input type="checkbox"/>

[Bulk Reassign](#) [Bulk Complete](#)

- On the tasks tab you can access and action any tasks outstanding for the employee you have selected. This includes reassigning tasks and setting reminder frequencies. You can also reassign tasks and complete more than one task for the employee in this area.

Details

The screenshot shows a user interface for an employee's details. At the top, there's a navigation bar with tabs: Overview, Tasks (1), Details (selected), Absence, Benefits, Appraisal & Training, Health & Safety, and Documents. Below this, the employee's name 'Samuel Smith' is displayed. The main content area is divided into several sections:

- Personal Details:** Includes fields for Sex (Male), Date of Birth (28/01/1988), SSN (JW111111P), Marital Status (Married), and Length of Service (2 Years 4 Months 19 Days).
- Contact Details:** Includes Email address (sam.smith@best.co.uk), Address (10 Park Road, Ayleston, London, W19 6LD), and Telephone numbers (Home: 020 12345678, Mobile: 07884 123456).
- Employment Details:** Includes Job Title (Consultant), Salary Band (A), Salary Grade (A1), Employment Type (Full Time), Hours per week (4 weeks), and Working Pattern (Default).
- Next of Kin:** Lists 'Jane' with contact number 020 12345678 and address 10 Park Road, Ayleston, London, W19 6LD.
- Right to Work Details:** Includes a Passport Number (023456789) and Expiry Date (12/01/2017).

- This tab contains the following details for the employee; Personal, Contact, Employment, Next of Kin, Right to Work and Bank.
- Access to financial details is a permission which can be granted to a manager

Right to Work Details

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

The screenshot shows the 'Right to Work Details' section. It displays the following information:

- Passport:**
- Number:** 023456789
- Expiry Date:** 12/01/2017
- View Document (0)** (button)
- Update Task** (button)

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 who the task is to be assigned to.

Attendance

Attendance displays information relating to an employee's holiday and absence statistics. The Attendance Calendar may be viewed.

Select year **Jan 14 - Dec 14** ▶

Add Holiday
Add Absence
Company Attendance Calendar

Holiday Summary

STATS

Holiday year: 01 Jan

Entitlement: 20.00 days

Bank Holiday Entitlement: 8.00 days

Additional Entitlement: 0.00 days

Leave taken: 6.00 days

Leave booked: 2.00 days

Leave remaining: 20.00 days



Legend: Taken/Booked, Remaining

Absence Summary

STATS

Sickness: 0.00 day

Family: 0.00 day

Other: 0.00 day

Show both holidays and absences ▼ 📅 📅

	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S
January		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31																	
February						1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28																
March						1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31													
April		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30																		
May				1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31															
June						1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30														
July		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31																	
August					1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31														
September	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30																			
October			1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31																
November						1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30														
December	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31																		

Key

 Today	 Holiday	 Absence	 Sickness	 Family Friendly
 Non-working Day	 Unconfirmed Holiday	 Unconfirmed Absence	 Unconfirmed Sickness	 Unconfirmed Family Friendly
 Bank Holiday				

Page | 36

Croner Simplify
January 17



Benefits

Hello Mark Manager | [Help](#) | [Change Password](#) | [Logout](#)

Croner
a Wolters Kluwer business

Croner Simplify Help me as I go along

Day to Day | My Simplify | **My Employees** | My Organisation | Processes | Reports | Documents | Health & Safety | Croner-i | Training

Benefits

[Home](#) > [My Employees](#) > Samuel Smith

[Overview](#) | [Tasks \(1\)](#) | [Details](#) | [Attendance](#) | **Benefits** | [Appraisals & Training](#) | [Health & Safety](#) | [Documents](#)

Samuel Smith

Standard Benefits

<input checked="" type="checkbox"/> Healthcare	Manage Document (0)
Scheme Number: 233455	Healthcare Provider: BUPA
Cost: £4556.00	Effective from: 04/01/2012
No. Dependents Covered: 3	Level of cover: Whole Family
Effective until: 06/01/2014	
<input type="checkbox"/> Death in Service	Manage Document (0)
<input type="checkbox"/> Company Loan	Manage Document (0)
<input type="checkbox"/> Childcare	Manage Document (0)
<input type="checkbox"/> Pension	Manage Document (0)
<input type="checkbox"/> Company Vehicle	Manage Document (0)

Other Benefits [+](#) [-](#)

You can view the Standard company benefits and the entitlement of the employee. This is “Read only”

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

Appraisals and Training

Appraisals & Training
Home > My employees > Samuel Smith

Overview | Tasks (1) | Details | Attendance | Benefits | Appraisals & Training | Health & Safety | Documents

Samuel Smith

Appraisals

Last Appraisal Date: [blank] Outcome: [blank] Next Appraisal Date: [blank]
 Appraisers: mark manager Notes: [blank] [change](#)
 To Be Prepared By: 13 Feb 2012 [Start Appraisal Process](#)

Goals	Due Date	Desired Outcome	Notes	Completed	Actions
Achieve Standard Level		Competent	Well Done	<input checked="" type="checkbox"/>	✎ ✖

[Add Goal](#) [View Past Appraisals](#)

Training

Training Course Code	Description	Date Completed	Outcome	Expiry Date	Actions
1-pam	pass	06 Jan 2014	pass	18 Oct 2014	✎ ✖
1-pam	pass	06 Jan 2014	pass	18 Oct 2014	✎ ✖
1-pam	pass	06 Jan 2014	pass	18 Oct 2014	✎ ✖
first aid		10 Dec 2013	pass	23 Dec 2013	✎ ✖
Fire Safety	Competent	29 Feb 2012	Pass	05 Jan 2014	✎ ✖

[Add Training](#)

Qualification

Qualification Level	Subject	Grade	Date Passed	Expiry Date	Actions
A Level	Maths	B	02 Jul 2001		✎ ✖

[Add Qualification](#)

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

Appraisals - click on the Start Appraisal Process button to commence the Appraisal process.

Appraisals

Last Appraisal Date: [blank] Outcome: [blank] Next Appraisal Date: [blank]
 Appraisers: [blank] Notes: [blank] [change](#)
 To Be Prepared By: [blank] [Start Appraisal Process](#)

Goals	Due Date	Desired Outcome	Notes	Completed	Actions
				<input type="checkbox"/>	✎ ✖

[View Past Appraisals](#)

Create Appraisal

Appraiser: [David Thomas (16)] Appraisal Date: [08/02/12] Outcome: []

Notes: []

[Cancel](#) [Save](#)

Input detail of appraisal and click **Save**.

Appraisal Steps

Home > Processes > Appraisal Steps

Mark process as Complete Delete Process

Process Summary

Process Name	Process Type	Concerning Employee	Notes
Appraisal Steps	Appraisal Steps	Mark Manager	<input type="text"/>
Date Started	Started By		
20 Aug 2013	Adam Admin		

Update

Process Details

Expand all Collapse all

		Date due	Completed	Completed by
1	Email	Aug 21 2013		
2	Desc.	Aug 21 2013		
3	Desc.	Aug 21 2013		
4	Desc.	Aug 21 2013		

Complete the four steps; the information will be saved to the employee record.

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.

Create Training

Training Course Code

Notes

Date Completed

Expiry Date

Add Task

Cancel Save

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.

The screenshot shows the 'Health & Safety' module for 'Samuel Smith'. The breadcrumb trail is 'Home > My Employees > Samuel Smith'. The navigation menu includes 'Overview', 'Tasks (1)', 'Details', 'Attendance', 'Benefits', 'Appraisals & Training', 'Health & Safety', and 'Documents'. The 'Health & Safety' section is titled 'Samuel Smith' and contains two main panels: 'PPE' and 'Responsibilities'. The 'PPE' panel has a table with columns for 'Equipment', 'Date Issued', and 'Date Expires'. It also includes checkboxes for 'Needs to be handed back' and 'Has been handed back', a 'Date Handed Back' field, and a 'Create Task' button. The 'Responsibilities' panel is currently empty and has an 'Add New Responsibility' button.

Health & Safety
Home > My Employees > Samuel Smith

Overview Tasks (1) Details Attendance Benefits Appraisals & Training **Health & Safety** Documents

Samuel Smith

PPE

Item 1				
Equipment	Date Issued	Date Expires		<input type="checkbox"/> Needs to be handed back
shoes	16/02/2012	15/02/2013	Create Task	<input type="checkbox"/> Has been handed back
Notes				Date Handed Back Please Select...

[Add New PPE Item](#)

Responsibilities

[Add New Responsibility](#)

To add a PPE item click 'Add new PPE item' and input detail.

The screenshot shows a web form titled "Add New PPE Item". It has a close button (X) in the top right corner. The form contains the following fields and options:

- Equipment:** A text input field containing "Hard Hat".
- Date Issued:** A date picker field showing "21/06/2013".
- Date Expires:** A date picker field showing "20/09/2016".
- Needs to be handed back:** A checked checkbox.
- Has been handed back:** An unchecked checkbox.
- Date Handed Back:** An empty date picker field.
- Buttons:** "Add Task" (circled in red), "Cancel", and "Save" (circled in red).

Click on **Add Task** (if relevant) to create and add reminder.

Click **Save**.

Health and Safety responsibilities can be assigned to managerial levels 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 your employee. You can also check their access to company guidelines and policy documents that you or the Administrator user may have instructed them to view.

- In the Documents tab click on the **Upload Document** button

Employee Information
Home > My Employees > Samuel Smith

Overview | Tasks (1) | Details | Attendance | Benefits | Appraisals & Training | Health & Safety | **Documents**

Samuel Smith

Mail Merged Documents

Create Document

Name	Date Created	Date Last Edited	Creator	Category	Sub Category	Actions	Issued
Invite to Investigation Meeting	10 Dec 2013	10 Dec 2013	Mark Manager	Disciplinary & Dismissals	Disciplinary procedure		Issued (10 Dec 2013)

If you have been given the necessary permissions you can also use the **Create Document** and the **Upload Document** button to create documents for your employees.

Employee Information
Home > My Employees > Samuel Smith

Summary | Work | Benefits | Attendance | Performance Management | Health & Safety | Employee Management | **Documents**

Samuel Smith

Mail Merged Documents

Create Document

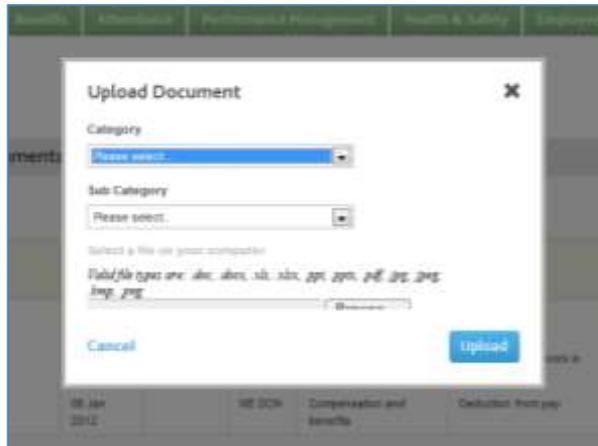
Name	Date Created	Date Last Edited	Creator	Category	Sub Category	Actions	Issued
000001118_FirmDec	25 Jan 2012		Adam Admin	Redundancy	Redundancy		<input type="checkbox"/> (mark as issued)

Uploaded Documents

Upload Document

Name	Date Created	Creator	Category	Sub Category	Actions
Certificate sam smith	27 Jan 2012	Adam Admin	Unassigned	Unassigned	

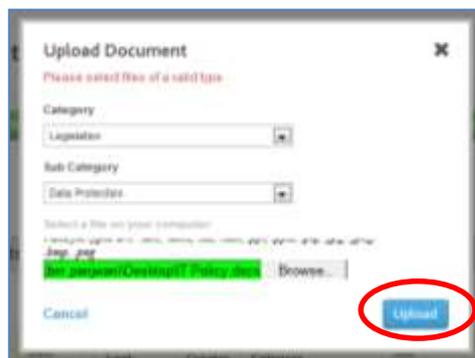
- Choose the Category and Sub Category that is appropriate to the document that you are about to upload



- Click the Browse button and select the file to upload
- Click Open



- Click Upload



My Organisation

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

Croner Simplify

Day to Day | My Simplify | My Employees | **My Organisation** | Processes | Reports | Documents | Health & Safety | Croner-i | Training

My Organisation

Home > My Organisation

My Organisation

Chart type by Company Structure by H&S Responsibility Find Someone:

- 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.



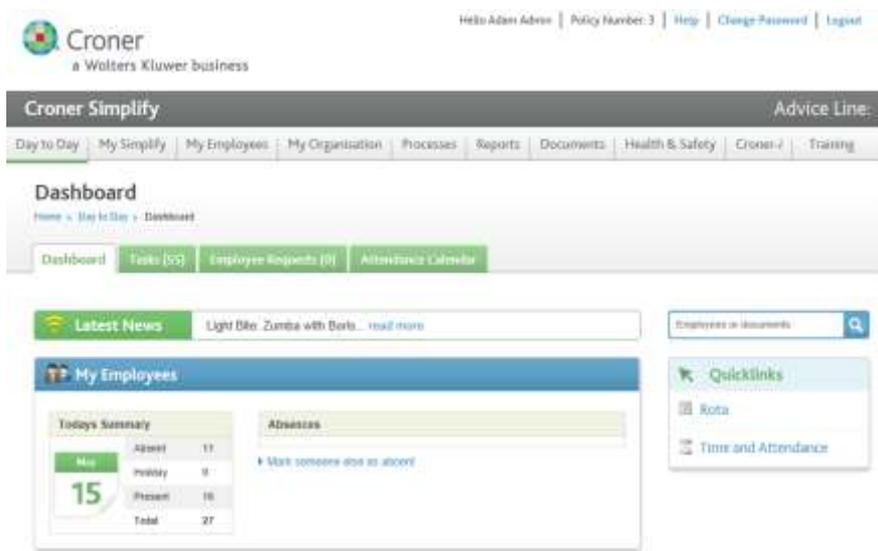
The organisation chart is automatically created when reporting lines are set within the Work tab of an employee record.

Processes

It is important that correct procedures are followed and in Simplify standard processes are available which guide users through fair and thorough investigations to ensure minimised risk of disputes and tribunal claims. One example process is the **Disciplinary Process**.

To start a process

Administrator users are able to start a process in relation to an employee. Click on the grey **Processes** tab.



- Click on the **Start New Process** button

Process Overview
Home > Processes > Overview

Filter: Search processes [Reset Filter](#)

Current Processes Showing 1-10 results of 20

Process Name	Started By	Started On	Date Started	Status
Approval Step	Andrew Thompson	10/01/2012	12 Jan 2012	In Progress
Disability Investigation	John Taylor	10/01/2012	12 Jan 2012	In Progress
Approval Step	John Taylor	10/01/2012	12 Jan 2012	In Progress
Disability Investigation	Andrew Thompson	10/01/2012	12 Jan 2012	In Progress
Cost Recovery	John Smith	10/01/2012	12 Jan 2012	In Progress
Procurement	John Smith	10/01/2012	12 Jan 2012	In Progress
Procurement	John Smith	10/01/2012	12 Jan 2012	In Progress
Value Add	Andrew Thompson	10/01/2012	12 Jan 2012	In Progress
Approval Step	John Taylor	10/01/2012	12 Jan 2012	In Progress
Approval Step	John Taylor	10/01/2012	12 Jan 2012	In Progress

Archived Processes *Processes which have been completed* Showing 1-4 results of 4

Process Name	Started By	Started On	Date Started	Date Completed
Disability	Andrew Thompson	10/01/2012	12 Jan 2012	18 Jan 2012
Disability Appeal	John Taylor	10/01/2012	12 Jan 2012	18 Jan 2012
Disability	John Taylor	10/01/2012	12 Jan 2012	18 Jan 2012
Value Process	Andrew Thompson	10/01/2012	12 Jan 2012	18 Jan 2012

- The following dialog box will appear.

- Fill out the various fields:
 - Tick the box **this process relates to an employee** if you are attaching the process to an individual employee’s record
 - Type the employee name in the Employee field
 - Select the appropriate process from the field called **User Process Table**. In this case we will choose ‘Disciplinary Process’
 - There is an option to give the process a more detailed name or accept the default name provided
- A completed dialog box should appear thus

- Click **Start**
- The Process Summary box will appear, along with all the steps in the chosen process (e.g. Disciplinary)

Process Name	Process Type	Concerning Employee	Notes
Disciplinary Investigation	Disciplinary Investigation	Abi Absence	
Date Started	Started By		
06 Jul 2012	Adam Admin		

Process Details			
		Date due	Completed
1	Desc.	Jul 09 2012	
2	Process	Jul 09 2012	
3	DiaryEntry	Jul 09 2012	
4	Merge	Jul 09 2012	
5	Desc.	Jul 09 2012	
6	Document	Jul 09 2012	
7	DiaryEntry	Jul 09 2012	
8	Process	Jul 09 2012	

The above is an example of a process that has not yet been started as there are no dates in the Completed Column.

Process steps

There are a variety of process step types that may be encountered:

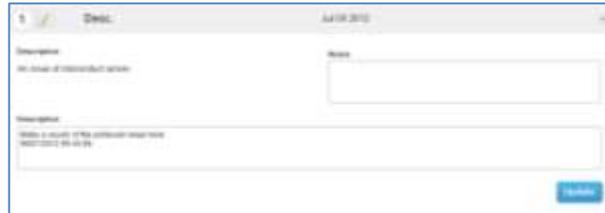
- Checkbox
- Merge
- Process
- Task
- Email
- Description
- Document
- Diary Entry

Confirmation of a completed stage of the process is displayed by clicking on the Expand button against the relevant step.

- Expand step 1 by clicking on the plus sign as shown in the red circle in the picture above.

Step 1 is an example of a Description step. In this stage of the process fill in the notes field to indicate the start of the process.

- Add notes
- Click on Update



Step 2 is an example of a Process Step. Build processes within processes. In this example of a Disciplinary, at this stage activate the Suspension Process and carry this out as part of the Disciplinary process.



- Click on the button **Access Process Steps**
- When complete, click on the checkbox to mark the step as being completed.
- Click on **Save**

Every time the Save button is selected on a step in the process, progress is being recorded. A process may be left and returned to at a later date. In the picture below the Completed column states which steps in the process have been completed so far and who by.

		Date due	Completed	Completed by
1	Desc.	Jul 09 2012	06 Jul 2012 at 10:03AM	Adam Adams
2	Process	Jul 09 2012		
3	DiaryEntry	Jul 09 2012		
4	Merge	Jul 09 2012		
5	Desc.	Jul 09 2012	06 Jul 2012 at 10:03AM	Adam Adams
6	Document	Jul 09 2012		
7	DiaryEntry	Jul 09 2012		
8	Process	Jul 09 2012		

Step 3 is a diary step.

The screenshot shows a 'DiaryEntry' form with the following sections:

- Description:** A text area containing the instruction: "You must investigate the situation as soon as possible and without unreasonable delay. Speak to your Business Team to discuss the next steps. You can use the diary entry to schedule the call." Below this is a 'Title' field and another 'Description' text area.
- Assign To:** A dropdown menu.
- Status:** A dropdown menu with 'Open' selected.
- Task:** A section with 'Due Date' and 'Assign To' fields.
- Reminder:** A section with 'Reminder Start Date' and 'Reminder Frequency' fields, a 'Delete Reminder' button, and a 'Remind Me' checkbox.
- Create Task:** A blue button at the bottom right.

When all steps in a process have been completed mark this process as complete. This marks the end of the process and the process will be archived to the Archived Process area - see picture below.

The screenshot shows the 'Process Overview' dashboard with two main sections:

Current Processes

Process Name	Assigned To	Started By	Date Started	Status
Approval Steps	Andrew Stevenson	John Clarke	18 Jan 2012	In Progress
Disciplinary Investigation	Andrew Stevenson	John Clarke	18 Jan 2012	In Progress
Approval Steps	John Taylor	John Clarke	18 Jan 2012	In Progress
Disciplinary Investigation	Andrew Stevenson	John Clarke	18 Jan 2012	In Progress
Capex Review	John Clarke	John Clarke	18 Jan 2012	In Progress
Procurement	John Clarke	John Clarke	18 Jan 2012	In Progress
Production	John Clarke	John Clarke	18 Jan 2012	In Progress
Selection	Andrew Stevenson	John Clarke	18 Jan 2012	In Progress
Approval Steps	John Clarke	John Clarke	18 Jan 2012	In Progress
Approval Steps	John Clarke	John Clarke	18 Jan 2012	In Progress

Archived Processes

Process Name	Assigned To	Started By	Date Started	Date Completed
Production	Andrew Stevenson	John Clarke	15 Jan 2012	15 Jan 2012
Production Approval	John Clarke	John Clarke	11 Jan 2012	11 Jan 2012
Production	John Taylor	John Clarke	11 Jan 2012	11 Jan 2012
New Process	Andrew Stevenson	John Clarke	08 Jan 2012	08 Jan 2012
Production	Andrew Stevenson	John Clarke	08 Jan 2012	08 Jan 2012

To re-open a process that's been archived:

- Click on the Process Name in the archived Processes area
- Select **Re-Open** or **Delete a Process**

The screenshot shows the Croner Simplify interface. At the top, there is a navigation bar with 'Croner a Wolters Kluwer business' logo on the left and user information 'Hello Adam Admin | Policy Number: 3 | Help | Change Password | Logout' on the right. Below this is a secondary navigation bar with 'Croner Simplify' and 'Advice Line:'. The main navigation bar includes 'Day to Day', 'My Simplify', 'My Employees', 'My Organisation', 'Processes', 'Reports', 'Documents', 'Health & Safety', 'Croner-i', and 'Training'. The 'Processes' tab is selected. The main content area is titled 'Disciplinary Investigation' and includes a breadcrumb 'Home > Processes > Disciplinary Investigation'. There are icons for a document and a printer, and two buttons: 'Mark process as Complete' and 'Delete Process', with the latter circled in red. Below this is a 'Process Summary' section with a table:

Process Name	Process Type	Concerning Employee	Notes
Disciplinary Investigation	Disciplinary Investigation	Abi Absence	
Date Started	Started By		
15 May 2014	Adam Admin		

An 'Update' button is located at the bottom right of the summary section.

Viewing Processes

An Administrator will see a section called Top Processes on the Day to Day page when logging in.

The screenshot shows the 'To-Do List' interface. It features a search bar and a table of tasks:

Type	Subject	Due	Assigned By	Related to employee
Task	Employee appointments and abs	11 Jan 2012	Adam Admin	
Task	Drinking Licence	16 Jan 2012	Adam Admin	David Jones
Task	Drinking Licence	16 Jan 2012	Adam Admin	David Thomas
Task	Drinking Licence	16 Jan 2012	Adam Admin	Jane Simpson
Task	Drinking Licence	16 Jan 2012	Adam Admin	Neil Palmer
Task	Drinking Licence	16 Jan 2012	Adam Admin	Lisa Hunter
Task	Drinking Licence	16 Jan 2012	Adam Admin	Lisa Hunter
Task	Drinking Licence	16 Jan 2012	Adam Admin	Lisa Hunter
Task	Drinking Licence	16 Jan 2012	Adam Admin	Wendy Morgan
Task	Drinking Licence	16 Jan 2012	Adam Admin	Wendy Morgan

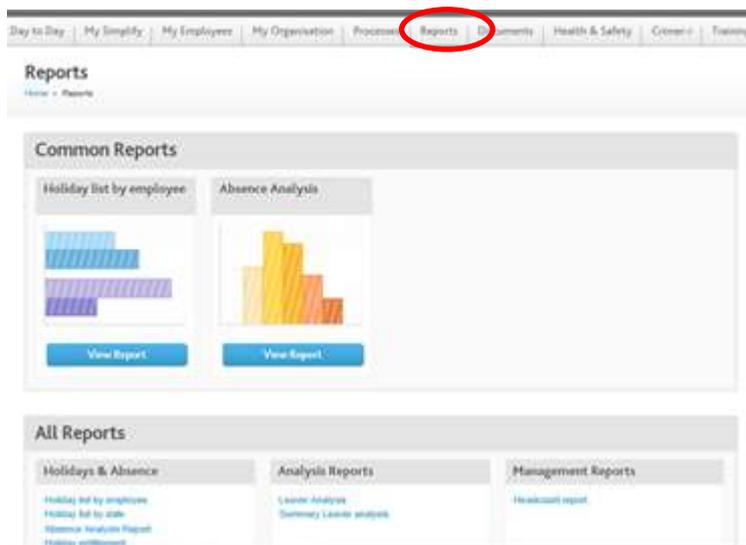
Below the table are two sections: 'Top Documents to Issue' and 'Top Processes'. The 'Top Processes' section is circled in red and contains a table:

Process Name	Employee
New visitor	
Selfies	

Click on the **Manage** button to go straight to an existing process.

Reports

If you are given the relevant reporting permission, there are a number of standard reports available in Simplify. To view the reports, click on the Reports tab in the Top Level tabs (grey)



Top 2 Reports

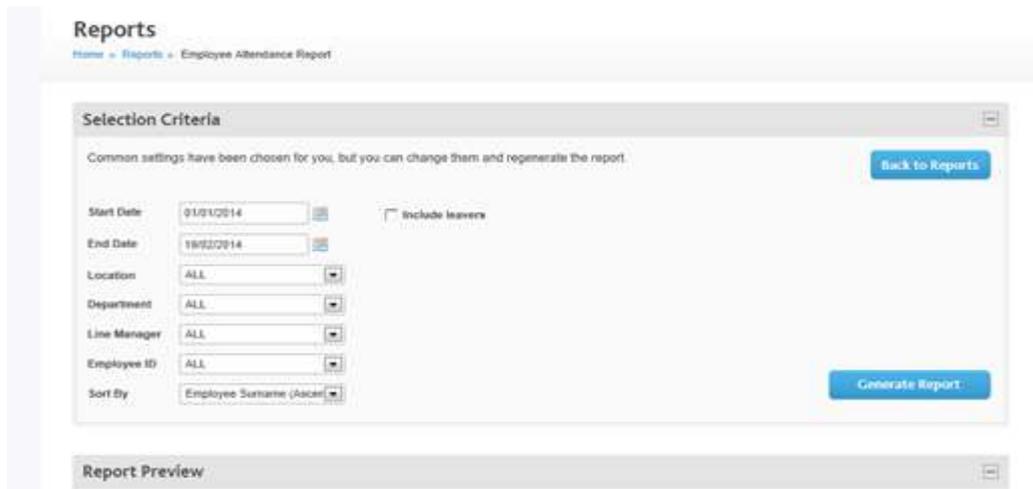
The two most common reports are highlighted at the top of the screen. Click on the View Report button to run one of the top 2 reports

Viewing a Report

The following example shows how to run a report to view all of your team's holidays that have been booked.

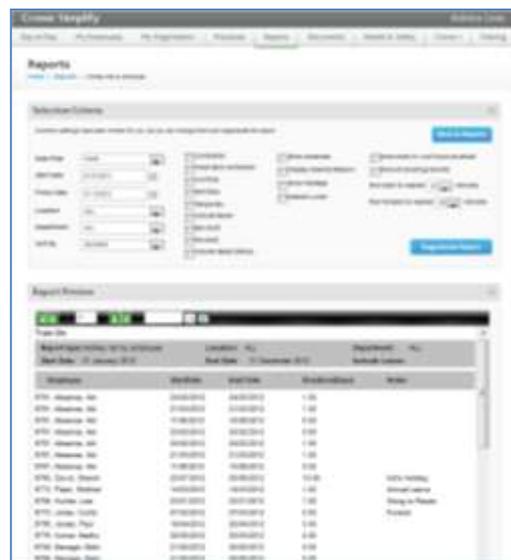
- Click **View Report** button on the first of the Top 4 reports **Holiday list by employee**

The screen is split into two areas - the top section is called Selection Criteria and the bottom section is called Report Preview. Specify the criteria needed to run the report and click on **Generate Report**.



In this example a report is required showing the staff holidays booked for the whole of 2012.

- In the **Start Date** field, select the date the report data is to start at, e.g. 01/01/2012
- In the **Finish Date** field, select the date the report data is to end at, e.g. 31/12/2012
- There is an option to choose to view records by Location or Department or both. In this example leave both set to **ALL**
- If required sort the staff list by Surname. Choose 'Surname' from the drop down box in the **Surname** field
- When finished specifying all your criteria, click on the **Generate Report** button to view the report in the **Report Preview** pane



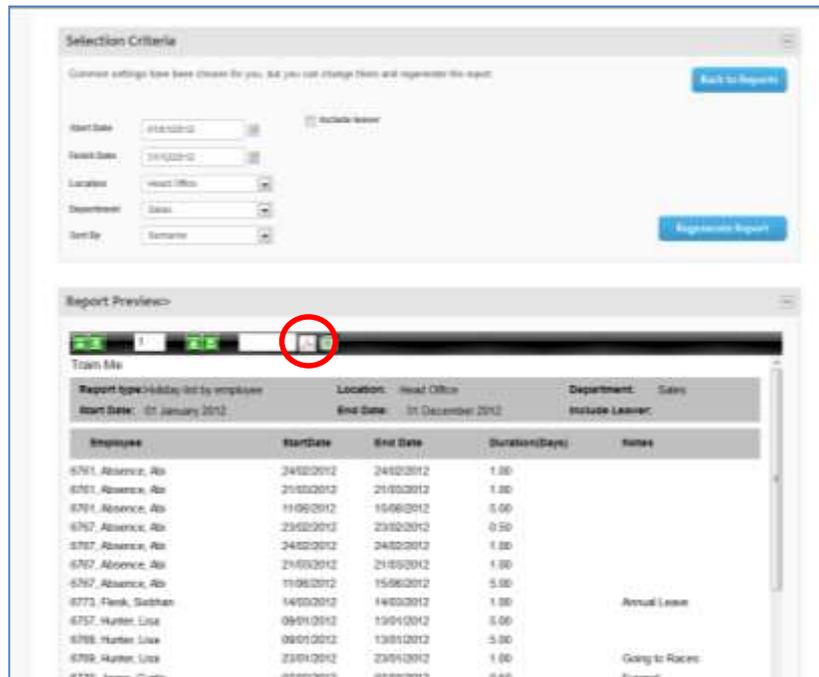
- All the holidays that are booked for the staff group for the year 2012 are now listed

Printing and Exporting

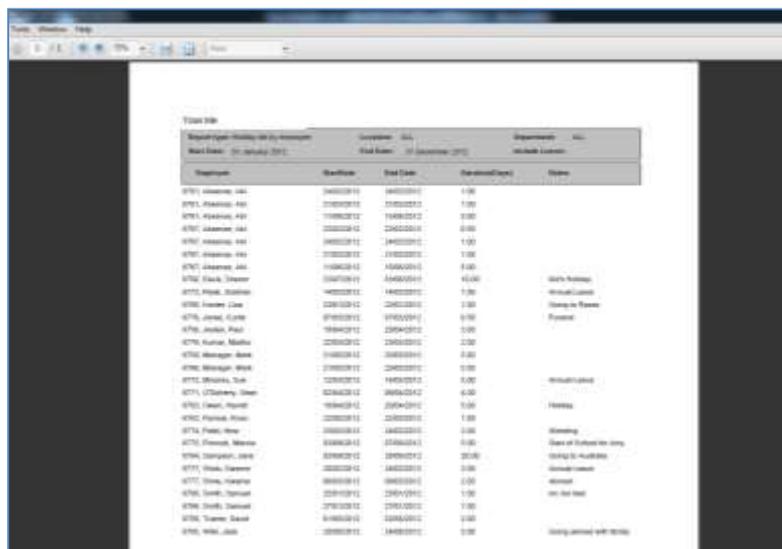
To print your report and/or export it to Microsoft Excel for further analysis:

Printing

- To view the report before printing, click on the Adobe Reader button to view your report as a .pdf file

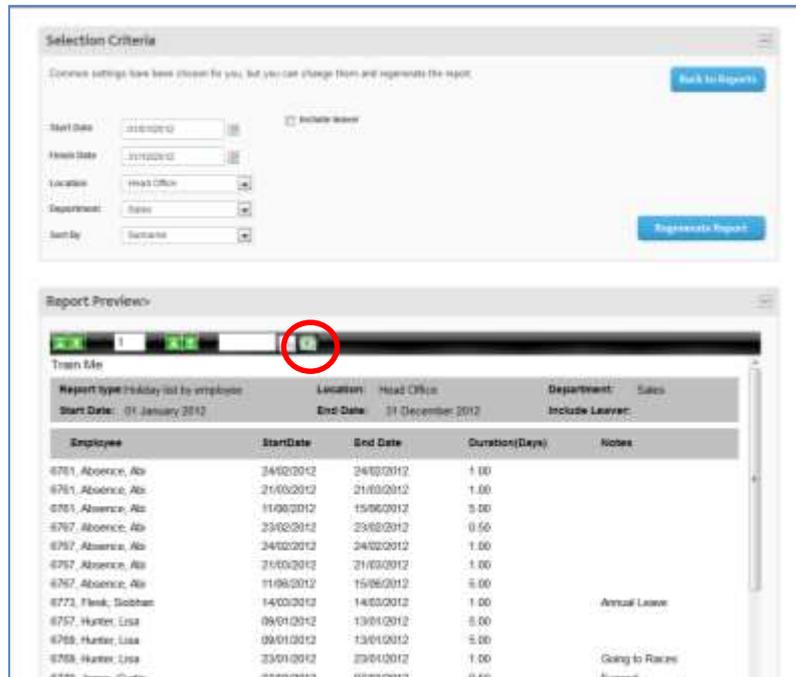


- Click on the print icon to print the report

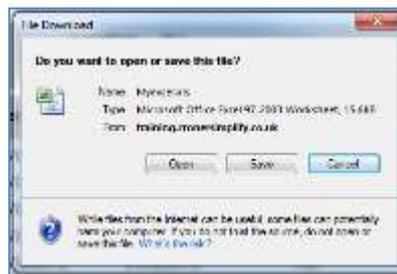


Reporting

- To export a report to Microsoft Excel click on the Excel button icon



- A dialog box will appear. Click on the Open button to view the report in Microsoft Excel



- Drag to adjust the column widths in Excel to see all data correctly. In the picture below the ## symbols appear when the column width needs adjusting.

Employee	Start Date	End Date	Duration (days)	Name
1761 Absence Abi	24/02/2012	24/02/2012	1	
1761 Absence Abi	21/03/2012	21/03/2012	1	
1761 Absence Abi	11/08/2012	15/08/2012	5	
1767 Absence Abi	23/02/2012	23/02/2012	1	
1767 Absence Abi	24/02/2012	24/02/2012	1	
1767 Absence Abi	21/03/2012	21/03/2012	1	
1767 Absence Abi	11/08/2012	16/08/2012	6	
1769 Davi, Sherrin	23/07/2012	03/08/2012	11	Kelly Holiday
1773 Plank, Stoshin	14/03/2012	14/03/2012	1	Annual Leave
1774 Harris, Lisa	03/01/2012	23/01/2012	21	Going to Rocks
1775 Jones, Colin	01/03/2012	07/03/2012	7	Parent
1776 Jones, Paul	18/04/2012	28/04/2012	11	
1776 Kinnaird, Madhu	22/01/2012	23/01/2012	2	
1778 Mangan, Mark	21/06/2012	25/06/2012	5	
1778 Mangan, Mark	21/06/2012	26/06/2012	6	
1772 Murray, Sue	12/01/2012	19/01/2012	8	Annual Leave
1771 O'Doherty, Sean	30/04/2012	06/04/2012	7	
1763 Owen, David	16/04/2012	20/04/2012	5	Holiday
1782 Palmer, Kim	22/06/2012	22/06/2012	1	
1775 Patel, Ross	23/02/2012	24/02/2012	2	Wedding
1774 Parnish, Maria	03/08/2012	07/08/2012	5	Start of School for Abby
1764 Sampson, Jane	03/08/2012	28/09/2012	27	Going to Australia
1777 Shole, Kwame	20/02/2012	24/02/2012	5	Annual Leave
1777 Shole, Kwame	08/03/2012	08/03/2012	1	Abroad
1766 Smith, Samuel	25/01/2012	25/01/2012	1	inc. day out
1766 Smith, Samuel	27/01/2012	27/01/2012	1	
1768 Turner, David	01/05/2012	02/05/2012	2	
1764 Wills, Jack	20/08/2012	24/08/2012	5	Going abroad with family

- To run further reports click on the **Back to Reports** button

Selection Criteria

Common settings have been chosen for you, but you can change them and regenerate the report

[Back to Reports](#)

Report Preview

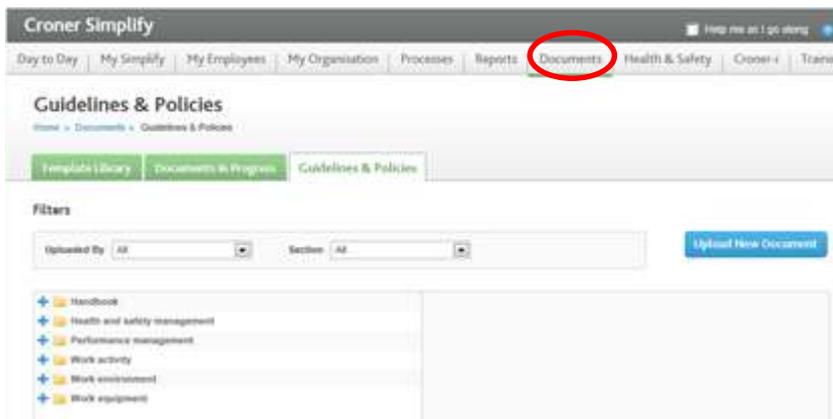
Simplify
Holiday List by Employee
 Location: Head Office
 Department: Sales
 Start: 01/01/2014 End: 31/12/2014
 Include Leaver: No

Employee	Start Date	End Date	Duration (days)	Description
9. Absence, Abi	14/04/2014	17/04/2014	4.00	
1. Smith, Samuel	26/01/2014	26/01/2014	1.00	

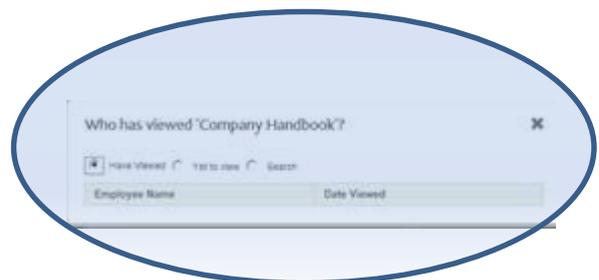
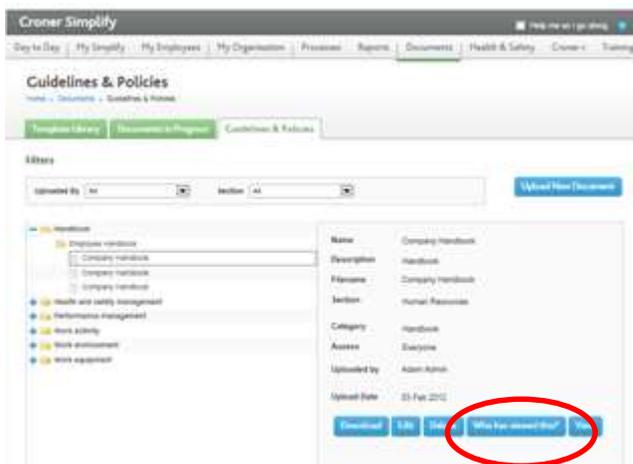
Documents

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

As a Manager user your access to documents will depend on the level of permission you have been given. If you have not been given permission to edit and create documents you will see the view below.



You can see which of your employees has viewed a particular document and who has yet to view it.



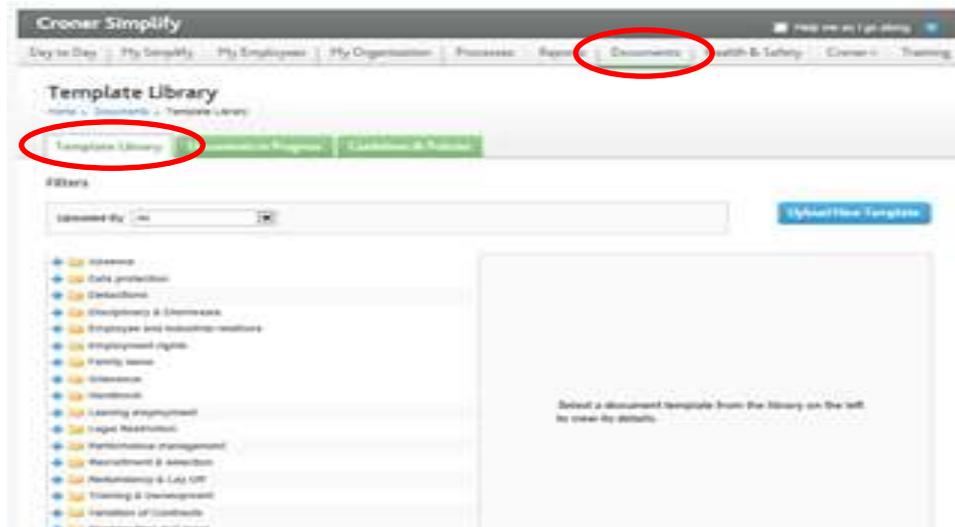
If you have been given permission to edit and create documents then the sections below will apply.

If you do not have permission to edit and create documents please go to Page 68.

View Templates

The first tab is Template Library. This is where Croner template documents, e.g. letters, guidance notes, etc are stored. These documents can be used to ensure legal compliance and speed up the management of employee records. The templates are arranged into groups

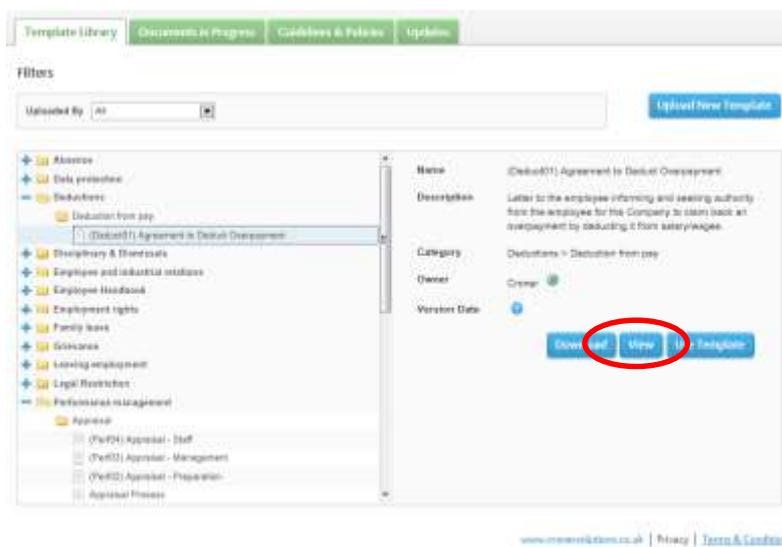
- Click on the **Documents** tab



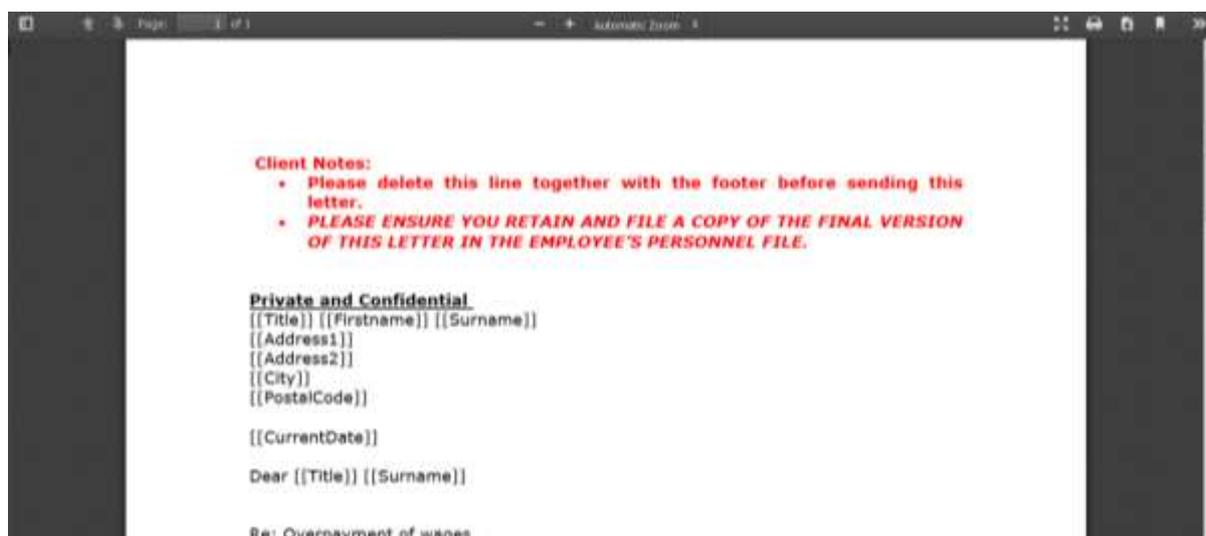
- Click on the **blue plus sign** to expand a group
- Click on a **yellow folder** or its name to expand the folder

The right hand pane shows the name of the document currently selected.

- Click on the **View** button to open the document in the AceOffix document management plugin. Now you can look at the document (the **Download** option will open the document in MS Word)



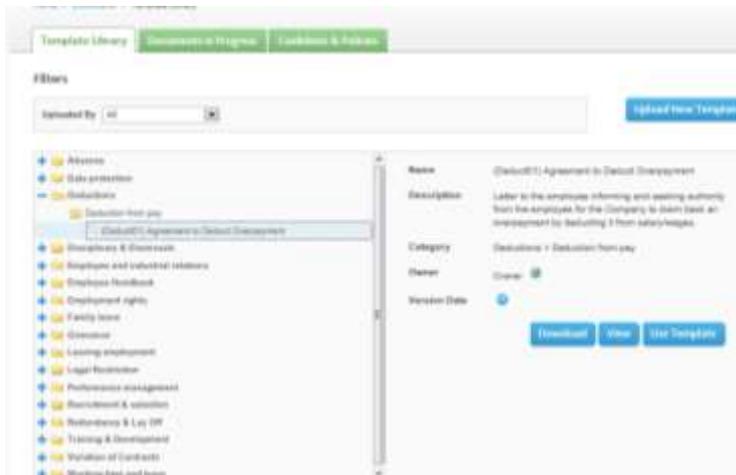
- The document that opens is a Croner template with 'Client Notes' appearing in red and merge fields appearing throughout the document. When using this template the correct employee information will appear in place of the merge fields, e.g. **[[Title]] [[Forename]] [[Surname]]** will be replaced with **Mr. Sam Smith**, etc. This document template will be in read-only mode because the **View** button was selected.



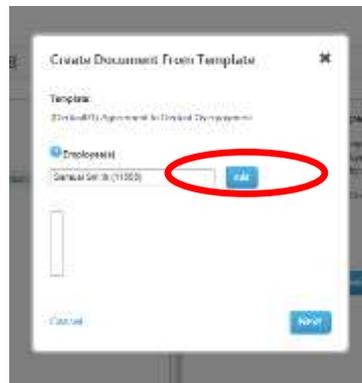
- Close the AceOffix plug in

Using Mail Merge Templates

To use this template and merge it with an Employee's personal information, open the template with the **Use Template** button.



- Click **Use Template**
- Click into the Employee field and type **Sam**
- Click **Sam Smith**
- Click **Add**

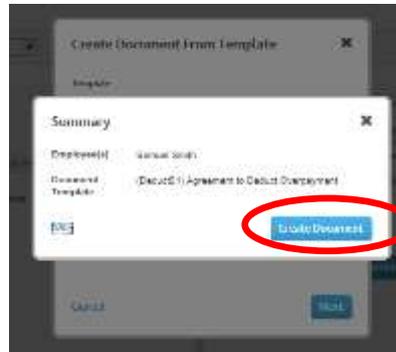


To send a template document to multiple employees, type employee names into the Employee(s) field and click on Add. Repeat this step until your list is complete and in the Employee List Area.

- Click **Next**

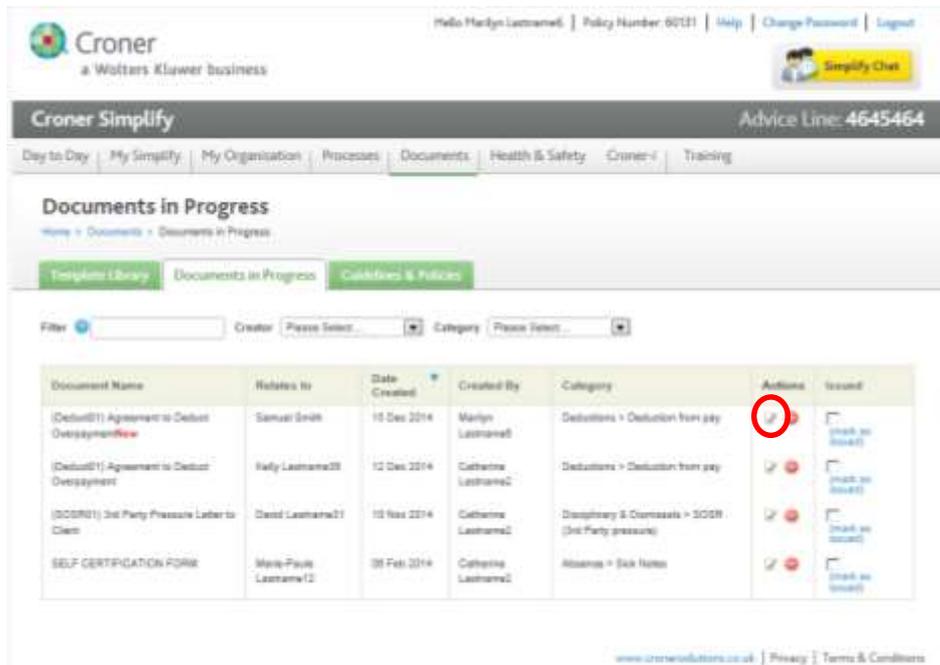
A summary box appears

- Check the details are correct and then click on **Create Document**



The Merged Document will appear at the top of the list in the Documents in Progress tab as shown below. The merge fields should now be replaced with the Employee's personal information. To edit the document, to remove the red text and the footer and to insert the relevant text into the document:

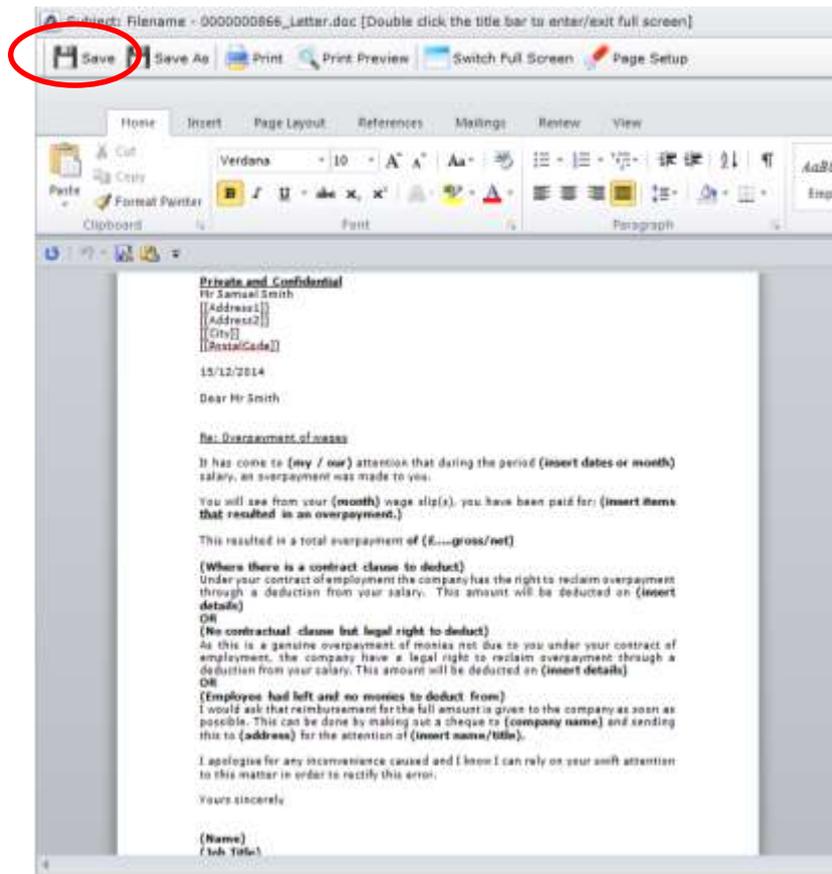
- Click on the **Edit** button to Open the Document in Edit mode



The merge fields display the individual employee(s) personal details, e.g. Name, Address. In the following screenshot, the red text has already been removed.

Ensure that users:

- Remove the red text at the top of the template
- Remove the footers
- Insert relevant data into the (bracketed) items in the template
- Add any other text required



When the document is complete:

- Click on the **Save** button
- The document will be saved back (with changes) to the Documents in Progress screen in Simplify

Documents in Progress

Home > Documents > Documents in Progress

Template Library Documents in Progress Guidelines & Policies

Filter Creator Please Select... Category Please Select...

Document Name	Relates to	Date Created	Created By	Category	Actions	Issued
(Deduct01) Agreement to Deduct OverpaymentNew	Samuel Smith	15 Dec 2014	Marilyn Lasname8	Deductions > Deduction from pay	 	<input type="checkbox"/> (mark as issued)
(Deduct01) Agreement to Deduct Overpayment	Maly Lasname8	12 Dec 2014	Catherine Lasname2	Deductions > Deduction from pay	 	<input type="checkbox"/> (mark as issued)
(SDOR01) 3rd Party Pressure Letter to Client	David Lasname7	10 Nov 2014	Catherine Lasname2	Disciplinary & Dismissals > SDOR (3rd Party pressure)	 	<input type="checkbox"/> (mark as issued)
SELF CERTIFICATION FORM	Maria-Paola Lasname12	08 Feb 2014	Catherine Lasname2	Absence > Sick Notes	 	<input type="checkbox"/> (mark as issued)

Sending the document to the Employee(s) - Self Service-Users ONLY

When finished editing the document, click on the **Mark as Issued** Check box. The document will appear in the Employee's record within the "Document" tab.

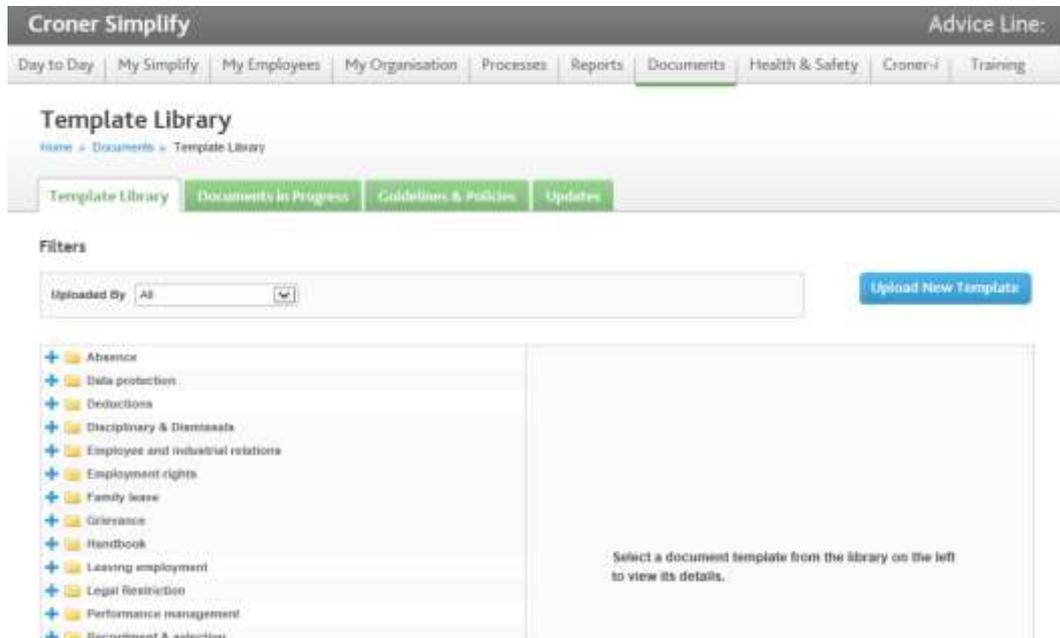
Template Library Documents in Progress Guidelines & Policies

Filter Creator Please Select... Category Please Select...

Document Name	Relates to	Date Created	Created By	Category	Actions	Issued
(Deduct01) Agreement to Deduct OverpaymentNew	Samuel Smith	15 Dec 2014	Marilyn Lasname8	Deductions > Deduction from pay	 	<input type="checkbox"/> (mark as issued)

Templates unique to an Organisation may be stored in the Template Documents tab of Simplify and can be used to merge with an Employee's record. To do this, go to the Documents tab / Template Library area:

- Click Upload New Template



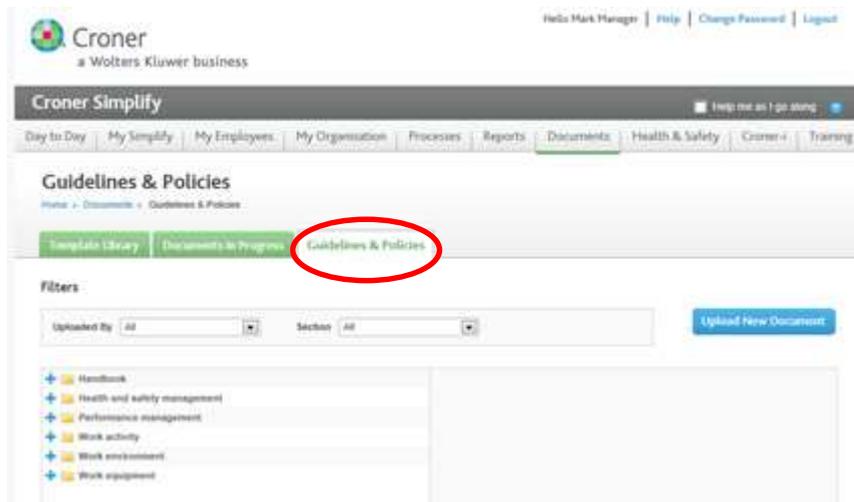
- The following dialog box appears -

- From the Category drop-down field, choose the most appropriate category for the template you are uploading.
- The **Access by profile** area allows the template to only be visible to a particular user type. The **Access by location** area also allows the templates to be restricted by location. This applies to those which are uploaded and not the standard content provided by Croner. The Default Administrator and the user who uploaded the item will always have visibility of the document
- Complete the Description field
- Click on **Browse** to upload the Document Template to the Template Library section

- Click Save

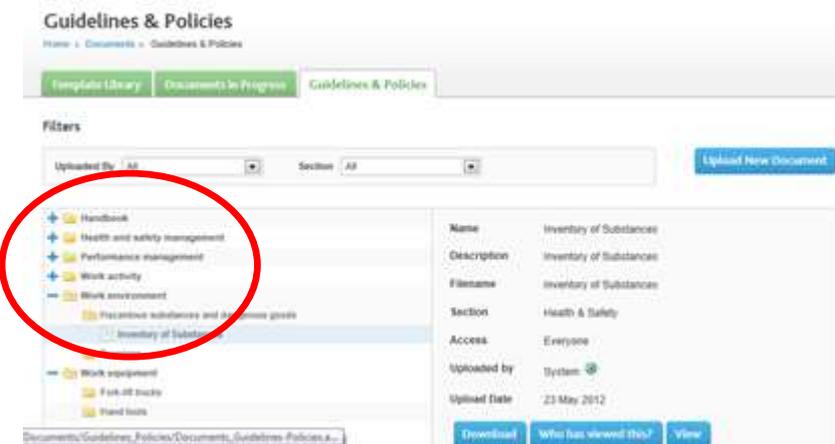
Guidelines & Policies

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



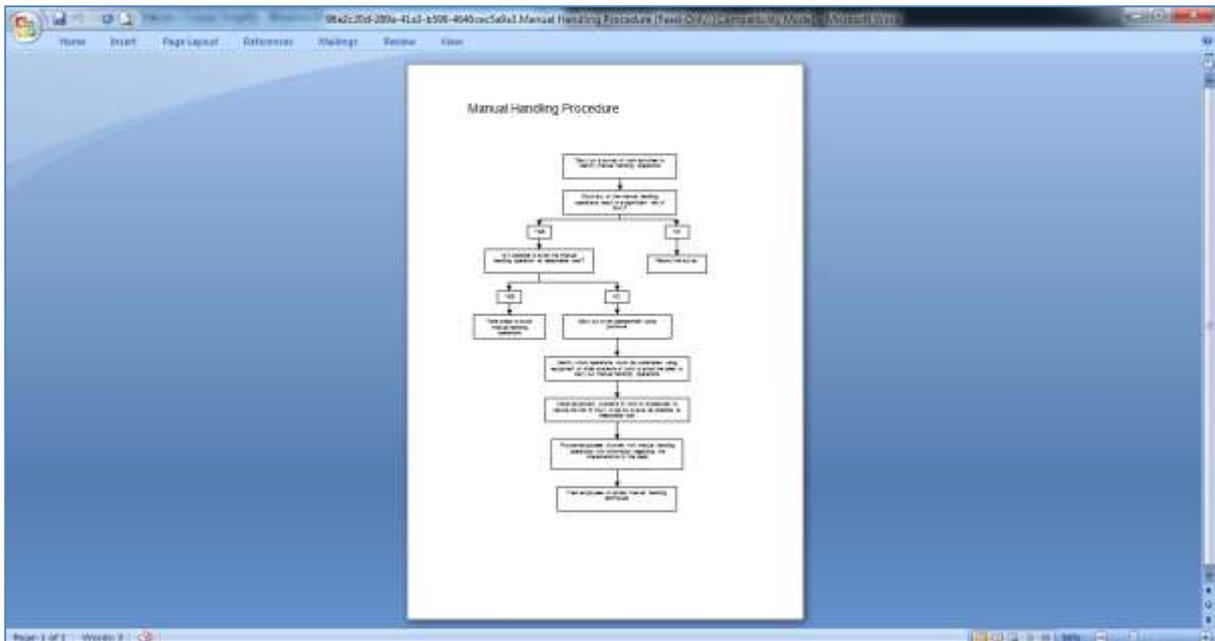
To view a Guideline or Policy document

- 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**

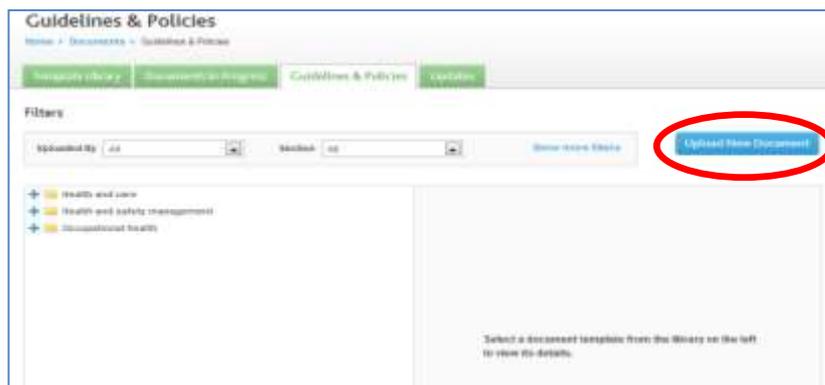
- The document will open Read-Only in the AceOffix document management software plug-in (this can be downloaded on first use)



Uploading a New Guideline or Policy

There is the functionality within the software to upload an organisation’s own guidelines and policies to this area and identify and assign permissions for the documents. A Guideline & Policy document you can be assigned to any or all of the User Profiles:

- Administrator
- Manager
- Employee
- Click on the **Upload New Document** button



- Fill out the relevant fields as in the screenshot below: **Section, Category, Access by profile type, Description**
- Click **Browse** to select the New Guideline or Policy document
- Click **Save**

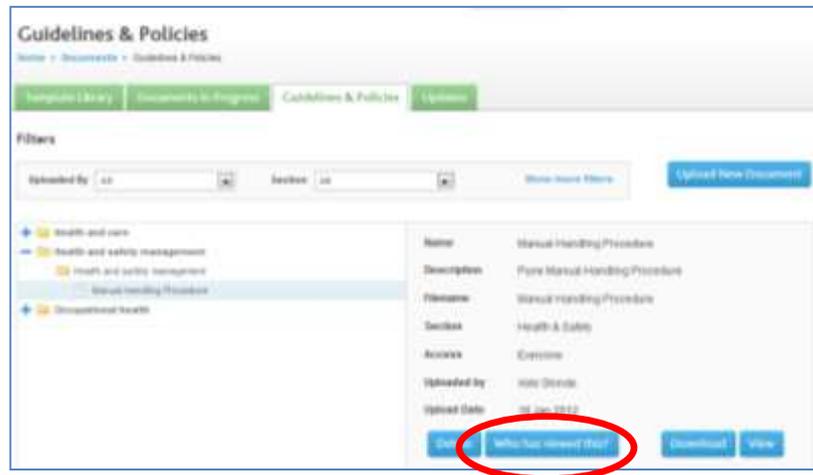
The document is added to the Guidelines & Policies area as in the screen below.

Name	Company Handbook
Description	Cover Company Handbook
Filename	Company Handbook
Section	Human Resources
Access	Everyone
Uploaded by	APM Group
Upload Date	28 Jan 2012

Auditing

Simplify automatically audits the viewing of company Guidelines & Policies and enables the Administrator and Manager users to monitor who has viewed and not viewed the document. To do this:

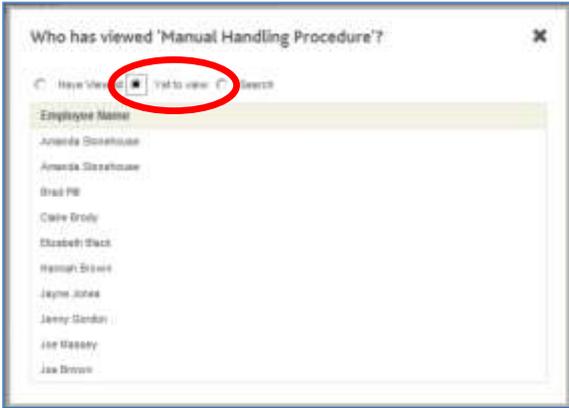
- Click on the **Who has viewed this?** button



- Administrator and Manager users can choose to see who **Have Viewed** and who are **Yet to view**

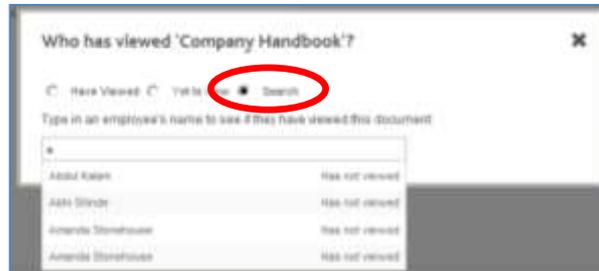


- Click on the radio button next to **Yet to view**
- The following screen shows the employees who have not viewed the document:



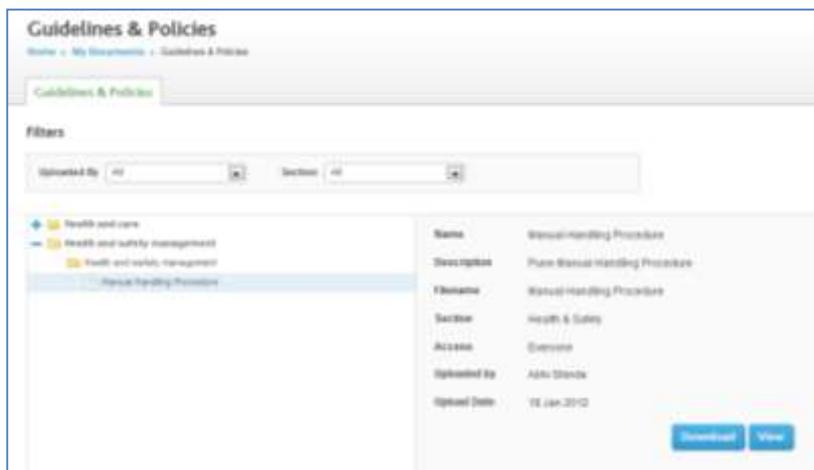
To search for a particular employee to check if he/she has viewed.

- Click on the radio button next to **Search**
- Begin typing in the name of the Employee
- View the Employee's name and check the status



Viewing Guidelines & Policies from the Employee Profile

An employee will see all the Guidelines & Policies that they have permission to view. For example if a document was uploaded to be viewed by the Manager profile, an employee (who isn't a Manager) will not see that document. The following screenshot shows the same Guidelines & Policies area from the Employee profile.



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

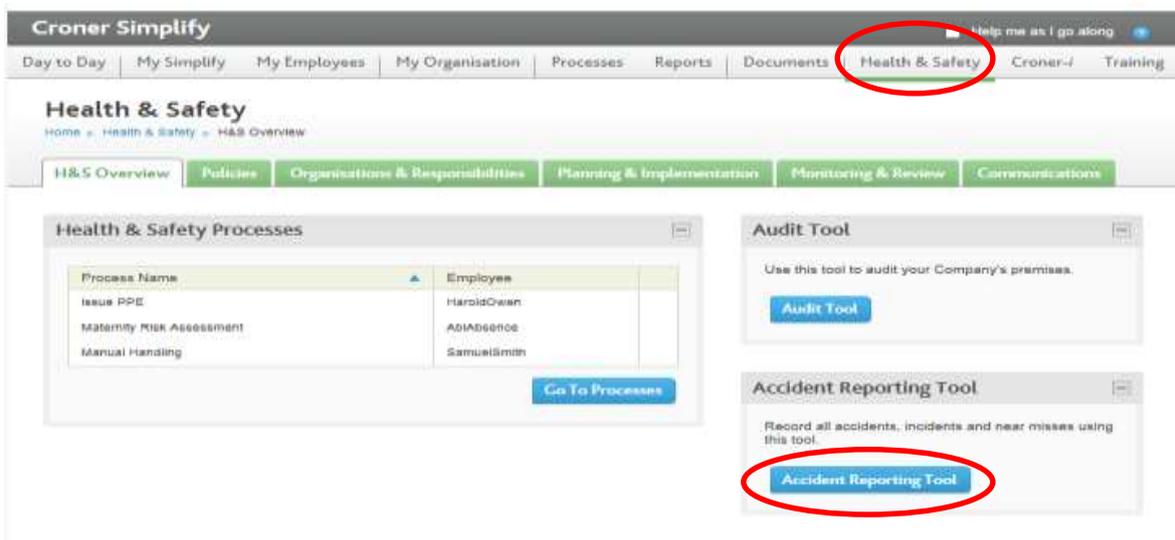
Accident Reporting Tool

You will only have access to this area if you have been granted access to the health and safety area.

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.

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

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Home
User Guide
Close Tool

Create a new report

The tool generates official forms under RIDDOR which are used by the enforcing authority. The form should be filled in by the employee or designated responsible person. If you are the employer or responsible person, fill in your details and those of your organisation. To avoid the need to re-enter basic information, the tool saves the information entered on this page. You will need to give each incident a unique reference number in order to track the incident internally and, for reportable incidents, externally. As you navigate to the next screen via the "Next" button your answers will be saved automatically. When reviewing an incident report, you may navigate to different screens via the green and white circles on the upper right - these indicate your progress through the official form.

Mandatory fields - in those fields requiring a response - are shaded yellow.

Incident

Please specify a reference for your incident/disease:

Are you reporting a disease? Yes No

Previous **Next**

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User Guide
Close Tool

Create a new report

The tool generates official forms under RIDDOR which are used by the enforcing authority. The form should be filled in by the employee or designated responsible person. If you are the employer or responsible person, fill in your details and those of your organisation. To avoid the need to re-enter basic information, the tool saves the information entered on this page. You will need to give each incident a unique reference number in order to track the incident internally and, for reportable incidents, externally. As you navigate to the next screen via the "Next" button your answers will be saved automatically. When reviewing an incident report, you may navigate to different screens via the green and white circles on the upper right - these indicate your progress through the official form.

Mandatory fields - in those fields requiring a response - are shaded yellow.

Incident

Please specify a reference for your incident/disease:

Are you reporting a disease? Yes No

Did the incident result in an injury? Yes No

Did the accident result in a fatality? Yes No

Did the accident result in a major injury or accident? Yes No

Did the accident involve an employee? Yes No

Previous **Next**

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Incident: Test 123 - Part A

Part A - About you

About you

Fill in your details and those of your organisation. To avoid the need to re-enter basic information, the tool saves the information entered on this page. As you navigate to the next screen via the "Next" button your answers will be saved automatically.

Incident

This incident is reportable to the enforcing authority.

What is RIDDOR form type? C2202 C2204

What is your last name? What is your first name?

What is your job title?

What is your telephone number?

About your organisation

What is the name of your organisation?

Organisation address and postcode:

What type of work does the organisation do?

Previous **Next**

Incident: Test 123 - Part B

Part B - About the incident

About the incident

Fill in the details about the incident. If you omit any information required, the tool will not allow you to continue to the next screen. As you navigate to the next screen via the "Next" button your answers will be saved automatically.

On what date did the incident happen?

At what time did the incident happen? (please use the 24-hour clock, eg 0800)

Did the incident happen at your organisation's address? Yes No

Where did the incident happen?

elsewhere in your organisation

at someone else's premises

in a public place

Give details of where it happened

If you do not know the postcode, what is the name of the local authority?

In which department or where on the premises did the incident take place?

Incident: Test 123 - Part C

Part C - About the injured person

About the injured person

Fill in the details about the injured person. If you omit any information required, the tool will not allow you to continue to the next screen. As you navigate to the next screen via the "Next" button your answers will be saved automatically.

Names

What is his/her full name? What is his/her first name?

What is his/her home address and postcode?

What is his/her home phone number?

How old is he/she?

Is he/she? Male Female

What is his/her job title?

Was the injured person:

one of your employees

on a training exercise?

on work experience?

employed by someone else?

self-employed and at work?

a member of the public?

Give details

Incident: Test 123 - Part D

Part D - About the injury

About the injury

Fill in the details about the injury. If you omit any information required, the tool will not allow you to continue to the next screen. As you navigate to the next screen via the "Next" button your answers will be saved automatically.

Details

What was the injury?

What part of body was injured?

Did the injured person:

require a consultation?

need resuscitation?

require hospital care for more than 24 hours?

require other care?

Incident: Test 123 - Part I Part I - About the kind of accident

About the kind of accident

Select from the options below the ONE that best describes the accident. As you make your selection other text on the screen will appear "green" and, if you click any information required, the text will not allow you to continue to the next screen. As you navigate to the next screen via the "Next" button your answers will be saved automatically.

Contact with moving machinery or material being handled

Hit by a moving object or falling object

Hit by a moving vehicle

Hit something fixed or stationary

Tripped while handling, lifting or carrying

Slipped, tripped or fell on the same level

Fall from height

Tripped by something protruding

Dropped or unbalanced

Exposed to, or in contact with, a harmful substance

Exposed to fire

Exposed to an explosion

Contact with electricity

Injured by an animal

Physically assaulted by a person

Another kind of accident (describe it in Part II)

Incident: Test 123 - Part II and Part III Part II and Part III

Describing what happened

Give as much detail as you can. For instance: the name of any substance involved, the name and base of any machine involved, the activity that led to the incident, the part played by any people. If it was a personal injury, give details of what the person was doing, describe any action that has since been taken to prevent a similar incident.

Workarea

Person slipped on surface - hand tool had been dropped up from floor. Slower accidentally broke his finger in the subelement that occurred.

Your Signature:

Signature to appear on report:

Date form completed:

RIDDOR form

Please indicate the contact method(s) used or to be used to notify the enforcing authority and whether confirmation has been received if initial contact has been made by telephone. Ticking the usual option doesn't mean that the form will be automatically created from the screen. This is an option that can be selected once the form is completed and has been saved.

Text by email?

Text by telephone?

- 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

User Reference	Incident Date	Incident Party	Incident Type	Report Status	Form Complete	Open	Closed	Final
Test 123	17/01/2012	Johns Bobson	Slip Injury - Employee	Yes	Yes			
123	16/01/2012	Johns Mike	Slip Injury - Employee	No	Yes			
321	18/01/2012	Johns Peter	Employee	No	Yes			

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

Health and Safety at Work Act 1974
The Recording of Injuries, Diseases and Dangerous Occurrences Regulations 1985

Report of an injury or dangerous occurrence

Filing 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?

2 What is your job title?

3 What is your telephone number?

About your organisation

4 What is the name of your organisation?

5 What is its address and postcode?

6 What type of work does the organisation do?

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?

2 What is their home address and postcode?

3 What is their home phone number?

4 How old are they?

5 Are they
 male ?
 female ?



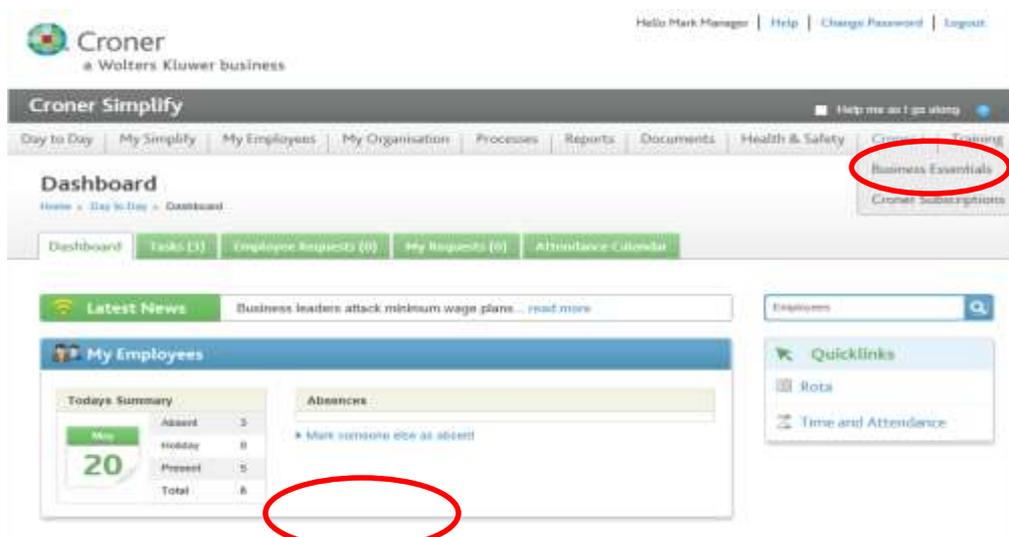
To modify your report click on the 'User Reference' number.

Croner-i

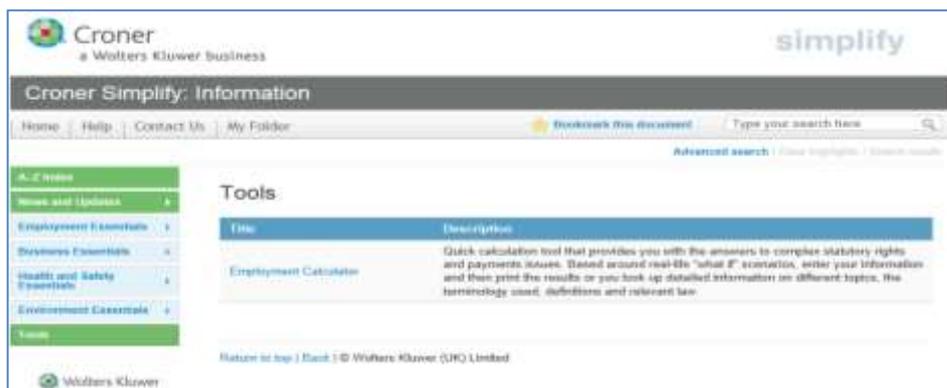
Croner I is an online information tool for businesses. Any Simplify user has to be given permission to see this. There is data on employment, health and safety, environment and tax and legal matters. Business Essentials is updated weekly and contains Quick Facts, In-depth and Step-by-step guides. It has been written specifically with non-HR professionals in mind and is fully searchable.

- Click on the Croner-I tab

Click Business Essentials

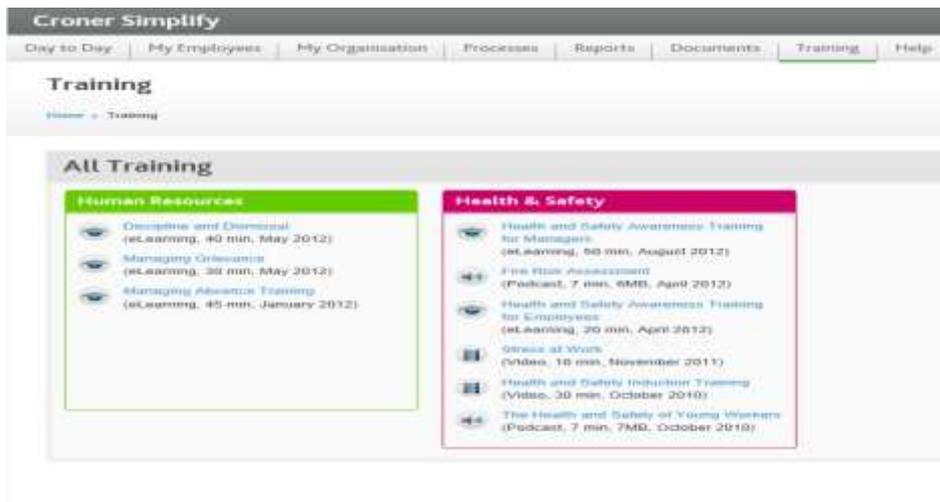


- A separate window appears
- Click on Tools in the left hand side bar
- Click on Employment Calculator



Training

This tab provides Training videos and podcasts covering Employment and Health Safety issues. Click on the appropriate subject to launch the material.



Within this tab you can find guidance on an Employees view and how to manage your responsibilities to your employees.