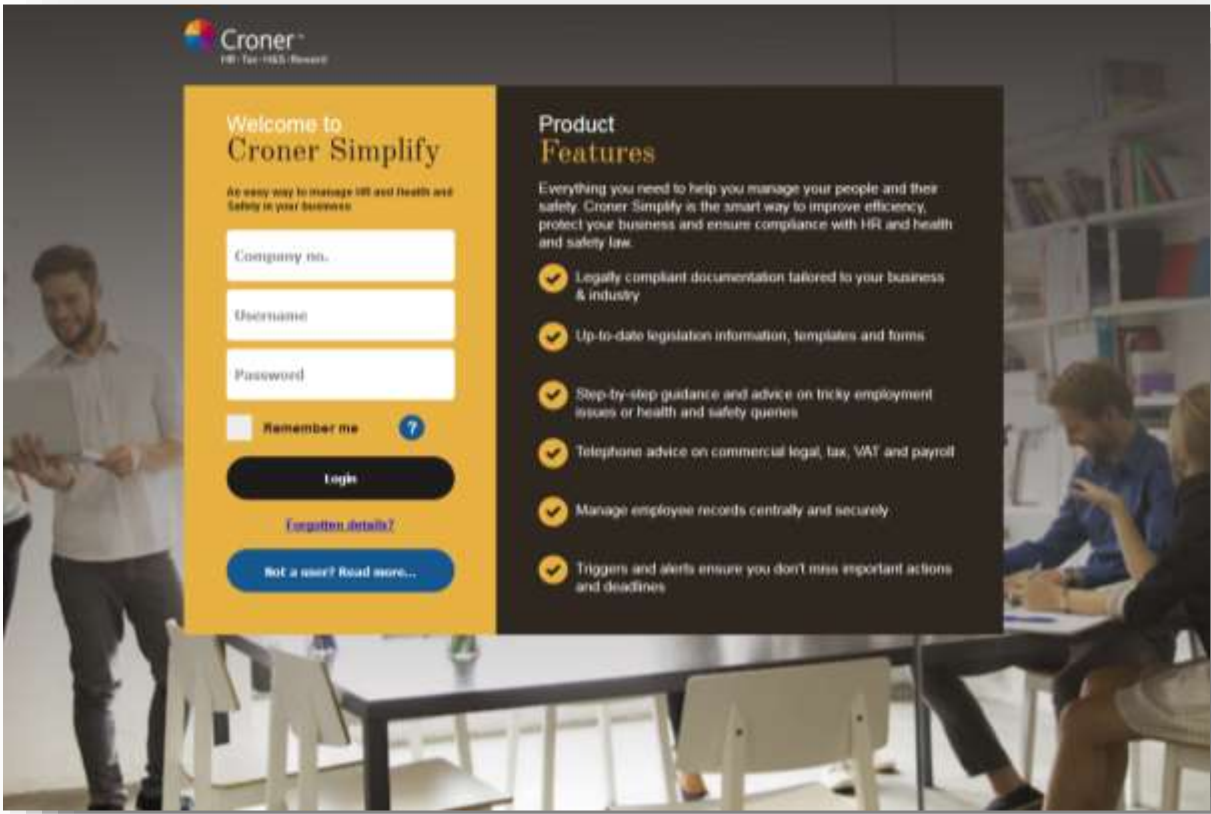


Croner Simplify

~ 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.

Contents

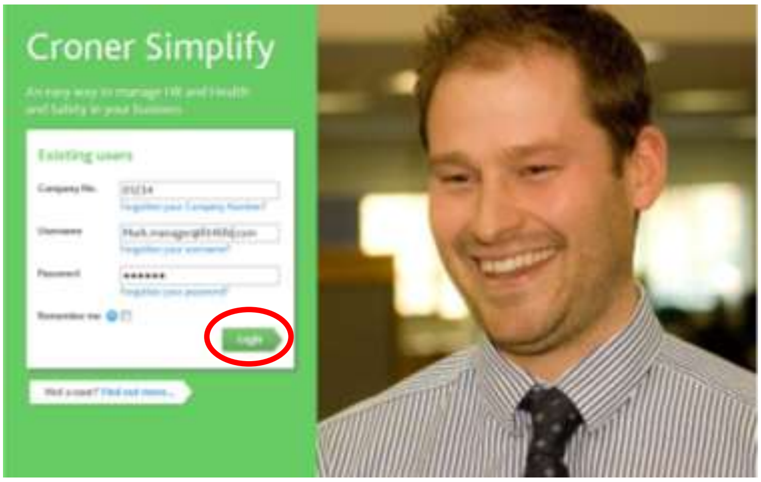
Navigation

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



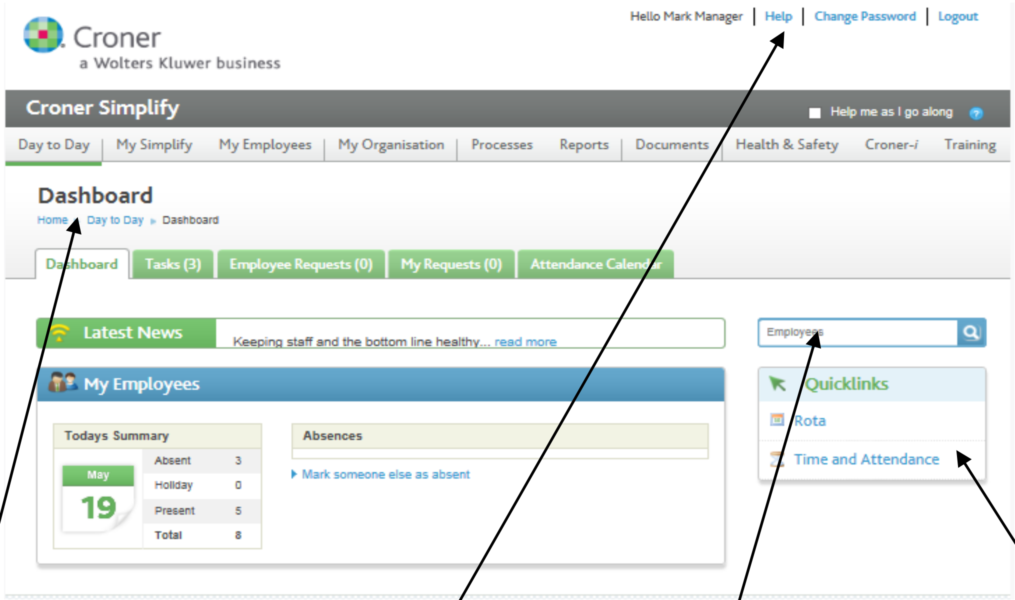
- Fill in the relevant details and click Login

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 statuary 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

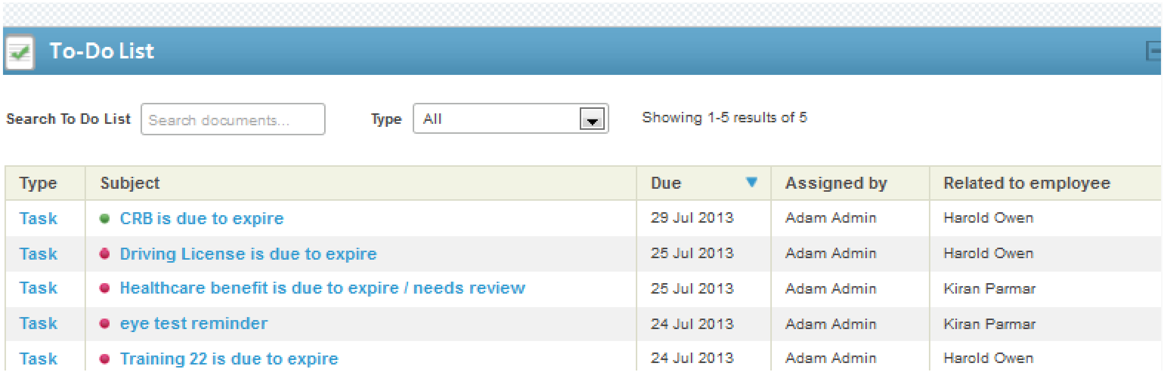
This shows up-to-date information and articles on key HR and health and safety matters.

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.



To-Do List

Search To Do List Search documents... Type All Showing 1-5 results of 5

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

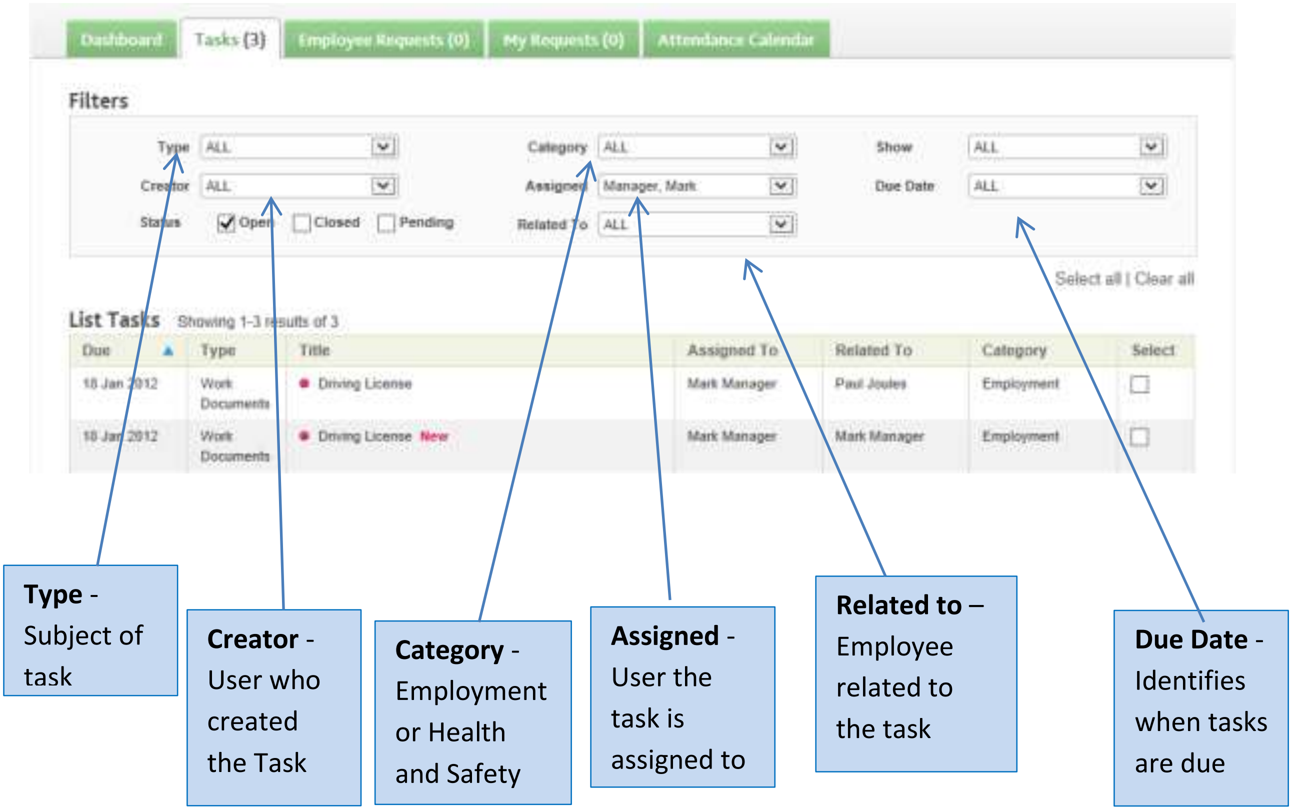
Processes in Progress

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

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.



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.

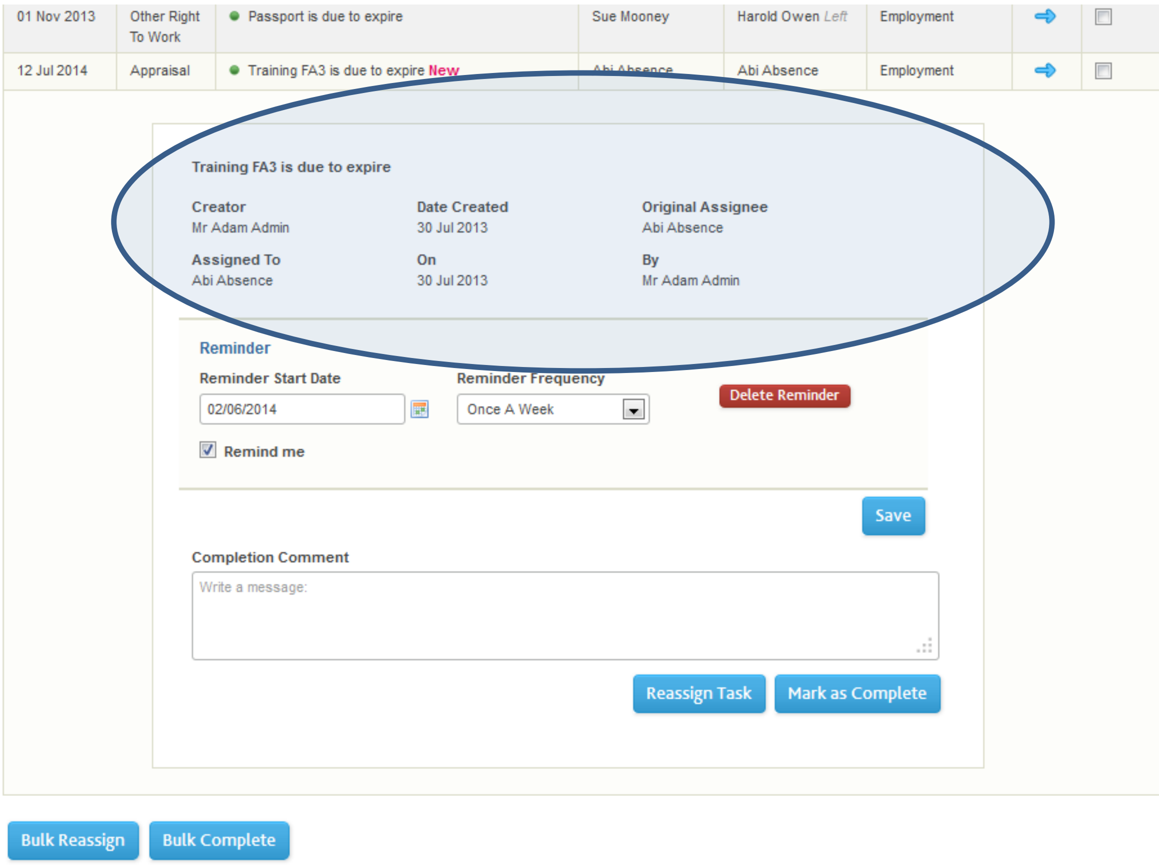
List Tasks Showing 1-7 results of 7

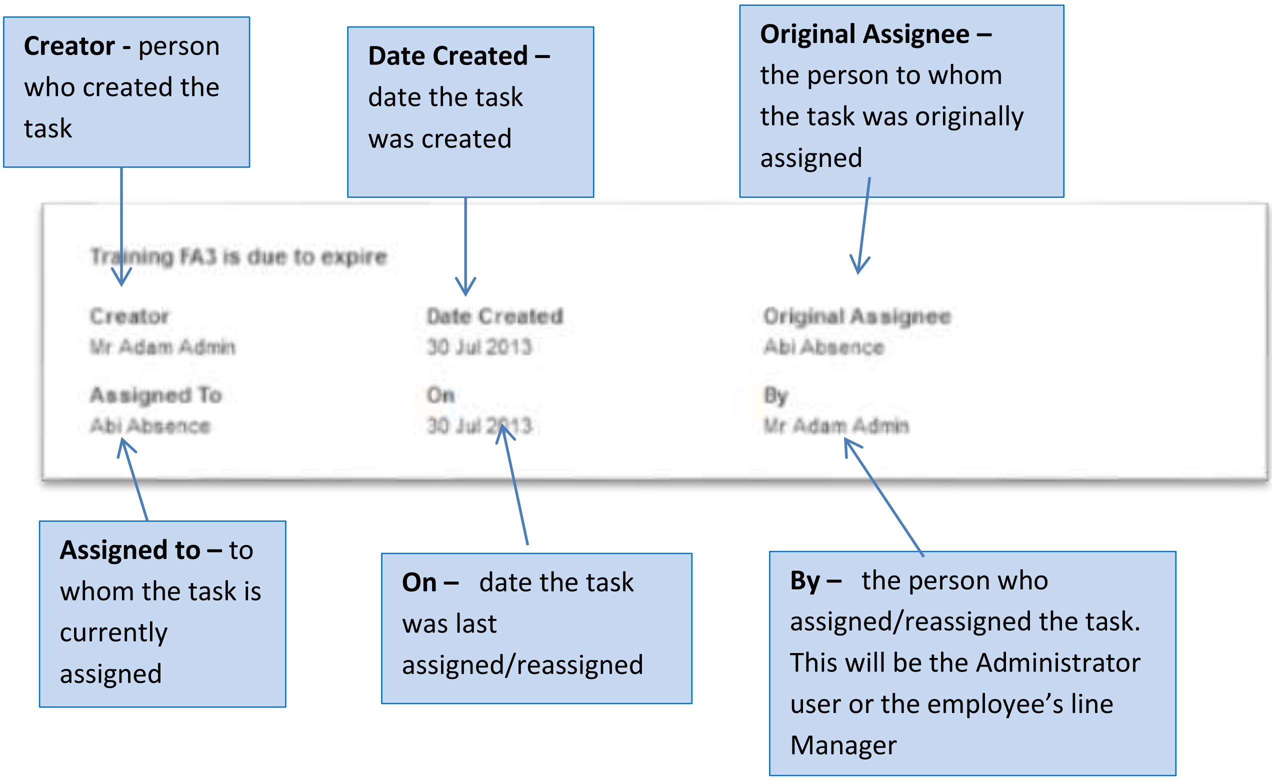
Due	Type	Title	Assigned To	Related To	Category	Go to	Select
24 Jul 2013	Appraisal	Training I11 is due to expire New	Abi Absence	Jane Sampson	Employment		
24 Jul 2013	Appraisal	Training 22 is due to expire	Abi Absence	Harold Owen *Left*	Employment		
25 Jul 2013	Other Right To Work	Driving License is due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

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.

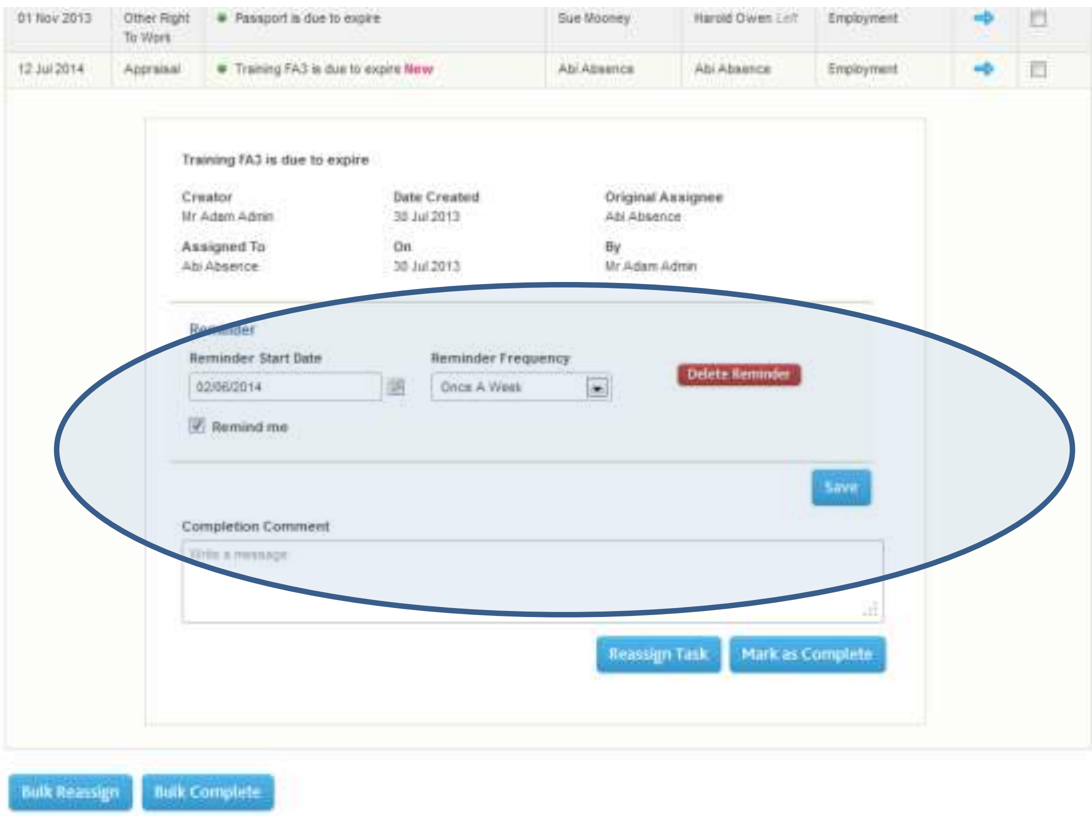
Tasks that are not yet due can only be viewed if you select **Pending**

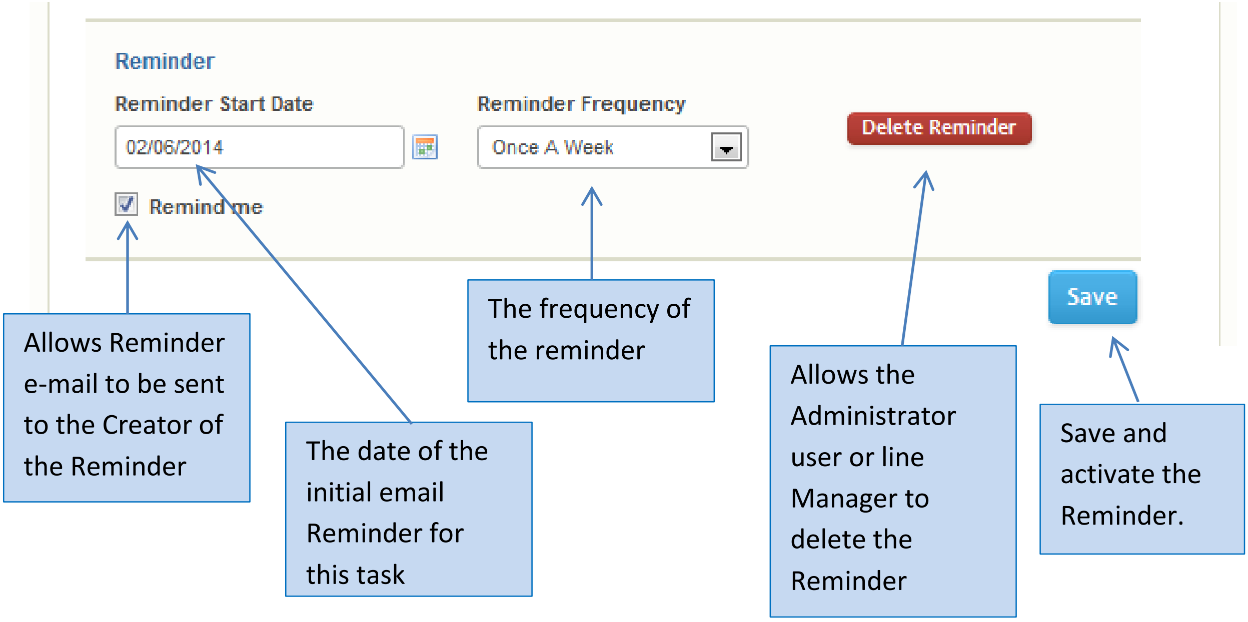
Click on a task to open and view the detail.





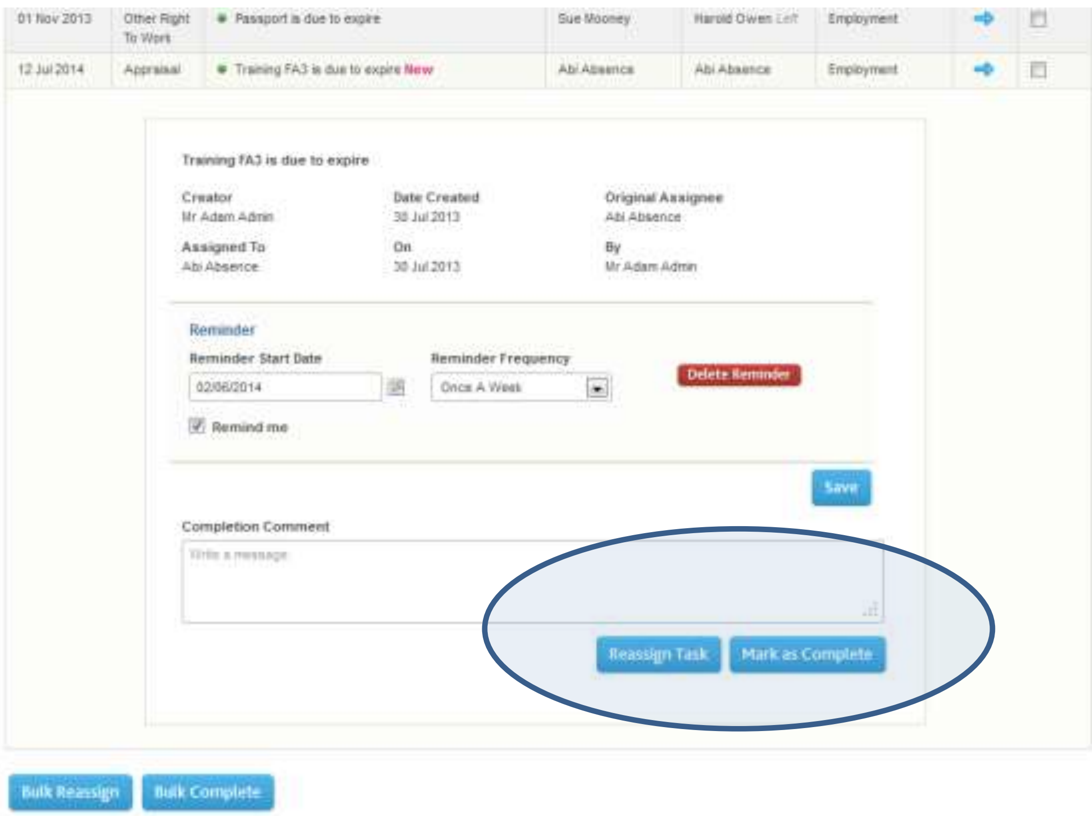
Simplify allows the user to set reminders which will send e-mail prompts to the Assignee and, if required, the Creator. These reminders will start on the stipulated date and re-occur at the set frequency.





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.

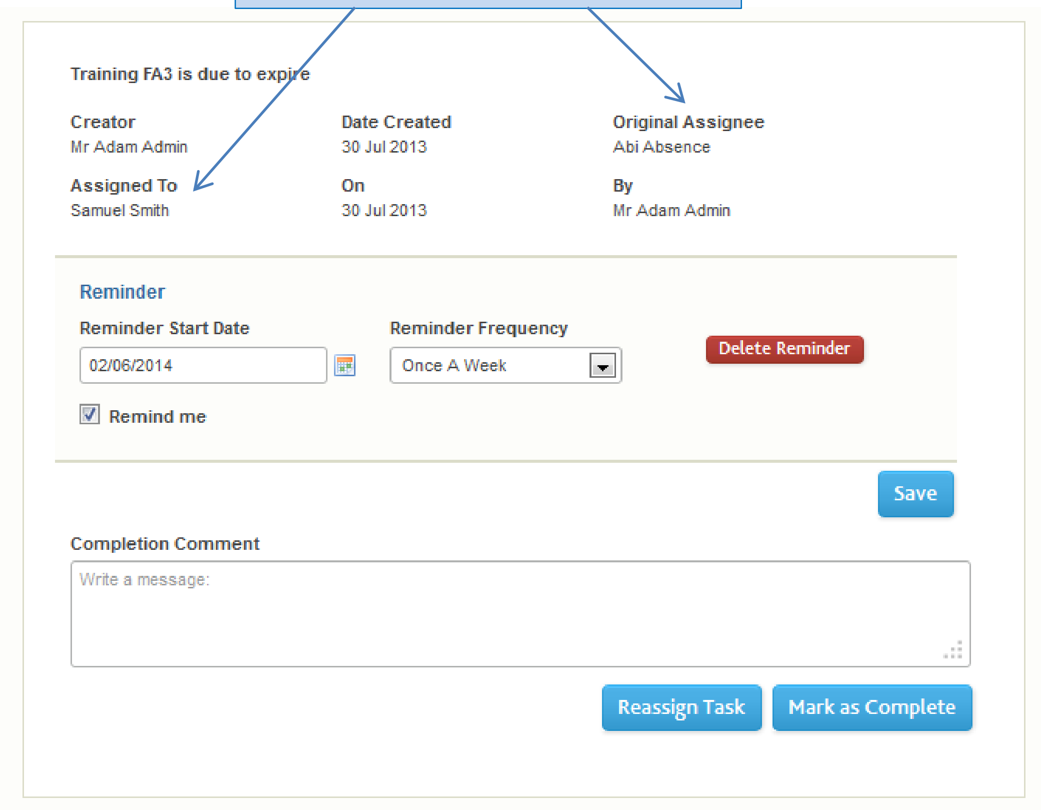
It is possible to reassign a Task.



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.

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

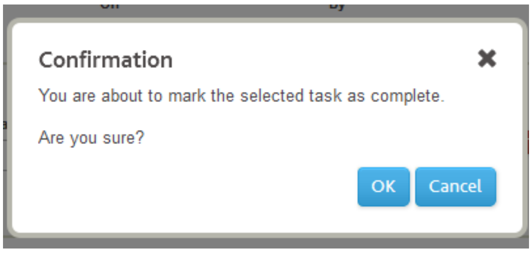


Tasks can only be assigned to current employees who are set up on self-service. Any task assigned to an employee who subsequently leaves the organisation is re-assigned to the default Administrator user. If the leaver is a Manager, Simplify will re- assign the task to the new manager or the default Administrator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

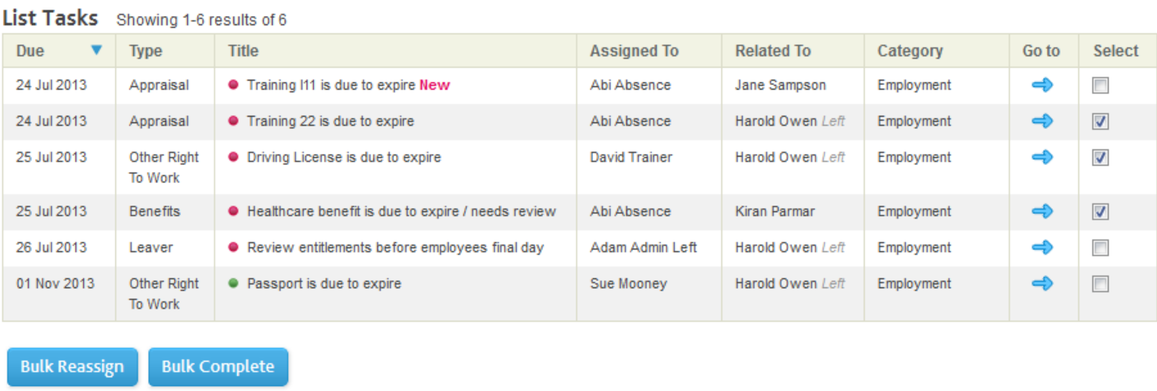
A user is also able to mark a task as complete from this window by clicking the **Mark as Complete** button.

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.



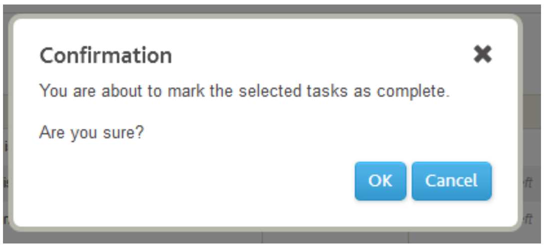
List Tasks Showing 1-6 results of 6

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		☐
24 Jul 2013	Appraisal	Training 22 is due to expire	Abi Absence	Harold Owen Left	Employment		☑
25 Jul 2013	Other Right To Work	Driving License is due to expire	David Trainer	Harold Owen Left	Employment		☑
25 Jul 2013	Benefits	Healthcare benefit is due to expire / needs review	Abi Absence	Kiran Parmar	Employment		☑
26 Jul 2013	Leaver	Review entitlements before employees final day	Adam Admin Left	Harold Owen Left	Employment		☐
01 Nov 2013	Other Right To Work	Passport is due to expire	Sue Mooney	Harold Owen Left	Employment		☐

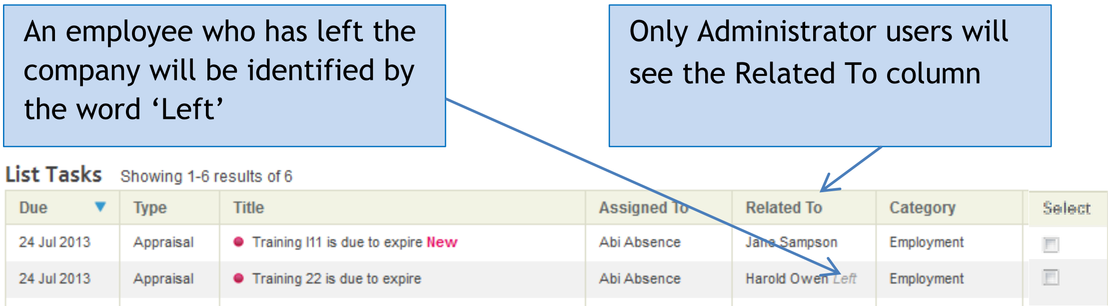
Bulk Reassign Bulk Complete

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.

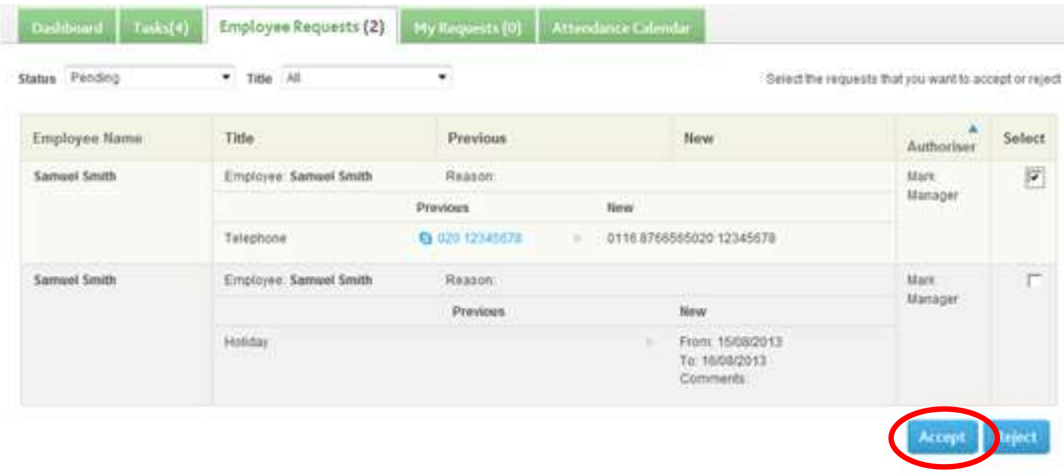


Click **OK**. This will mark all items checked in the Task List complete and remove them from the list.

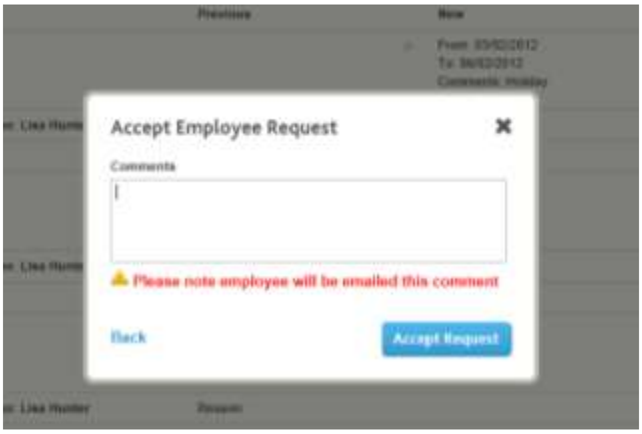


Employee Requests

- 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

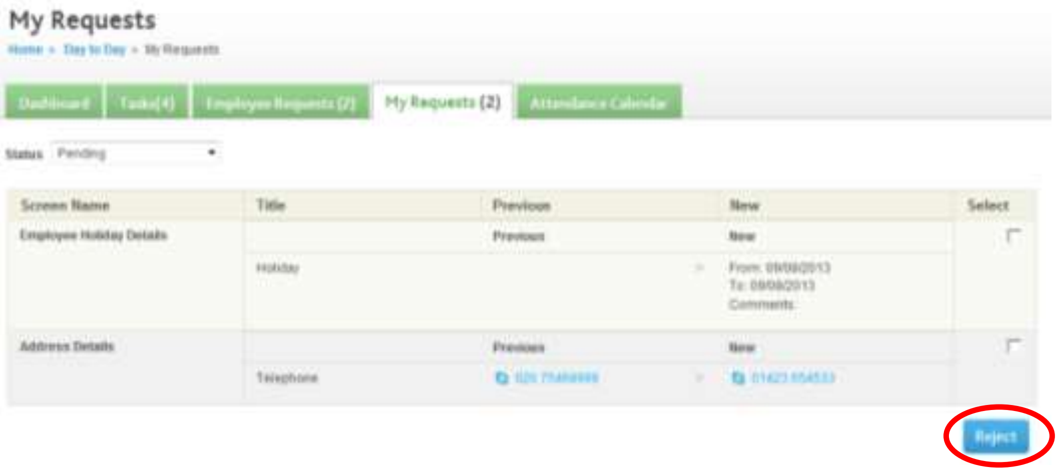


- Add a comment in the **Comments** box
- Click **Accept Request**



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**



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.

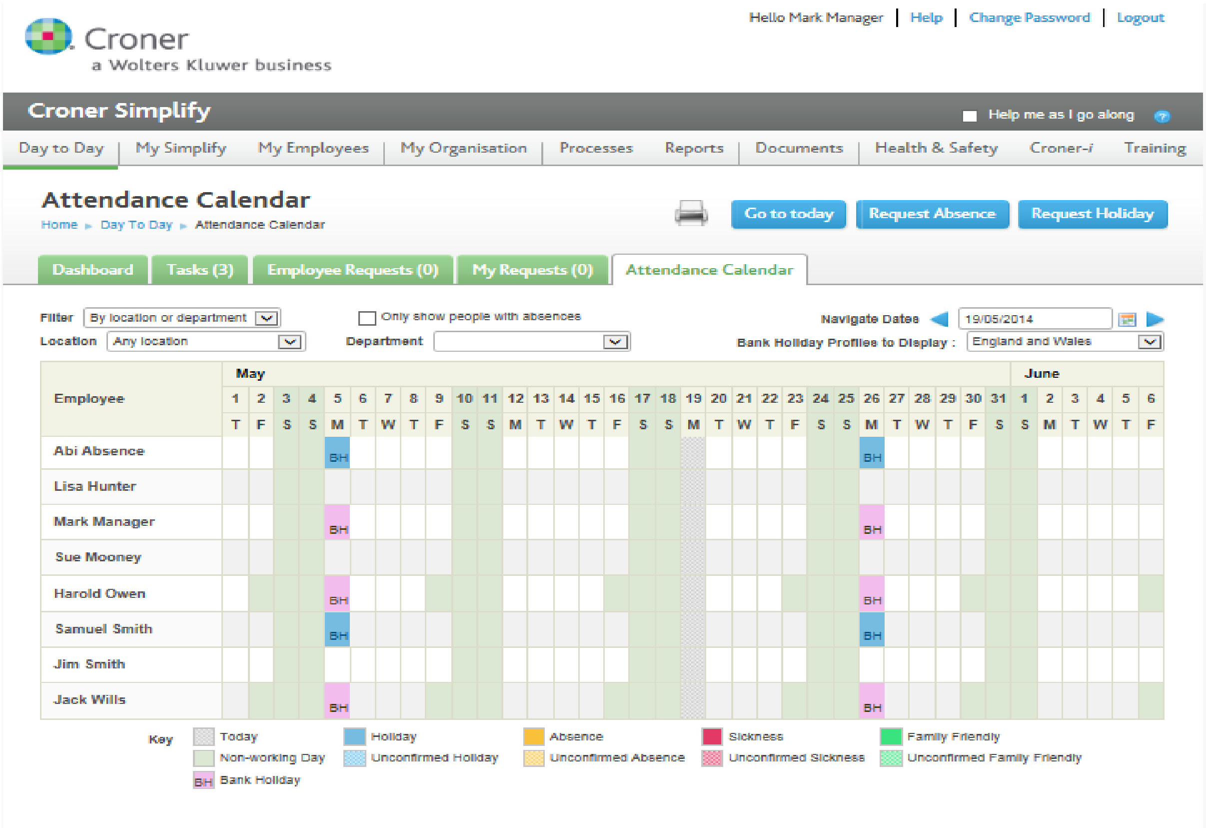
Assigning a Work Period to an Employee

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 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.

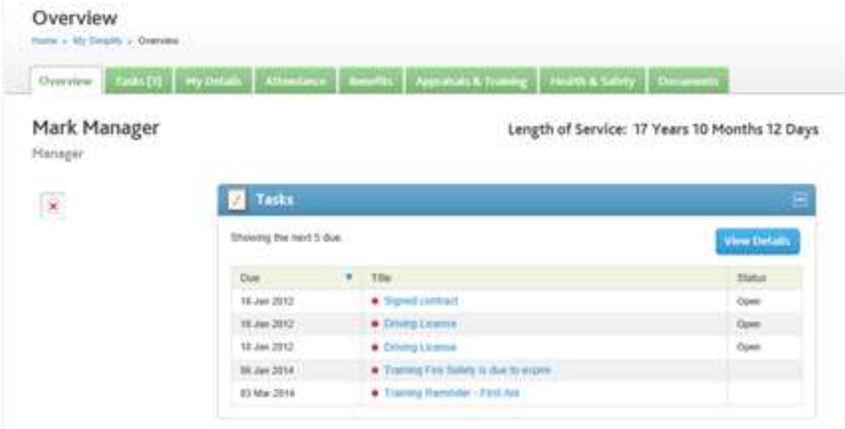
Please note the key at the bottom which helps you identify items on the calendar by colour

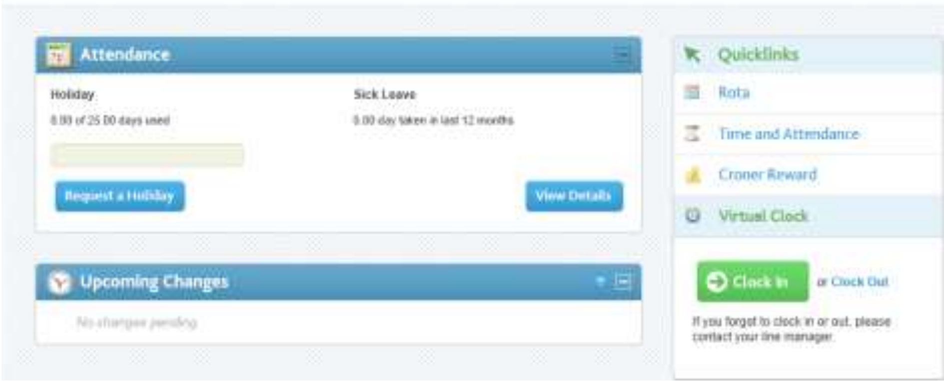
My Simplify

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.



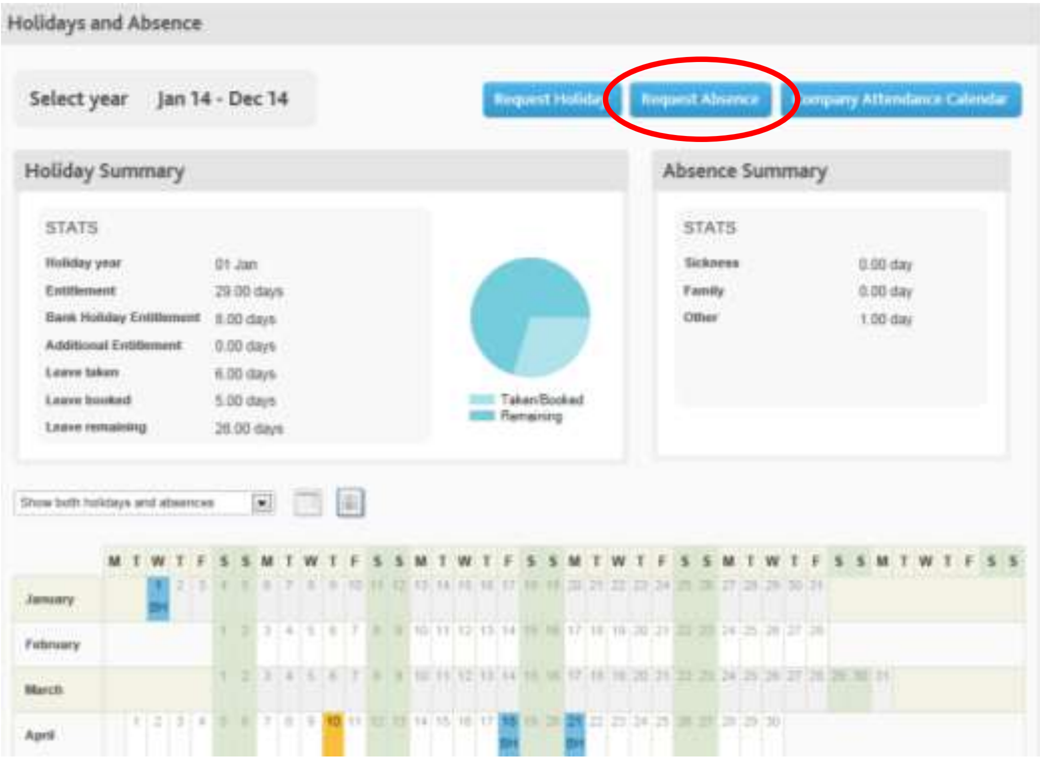


Click on the **Request a Holiday** button and complete the **Start Date** and **End Date** boxes.

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.

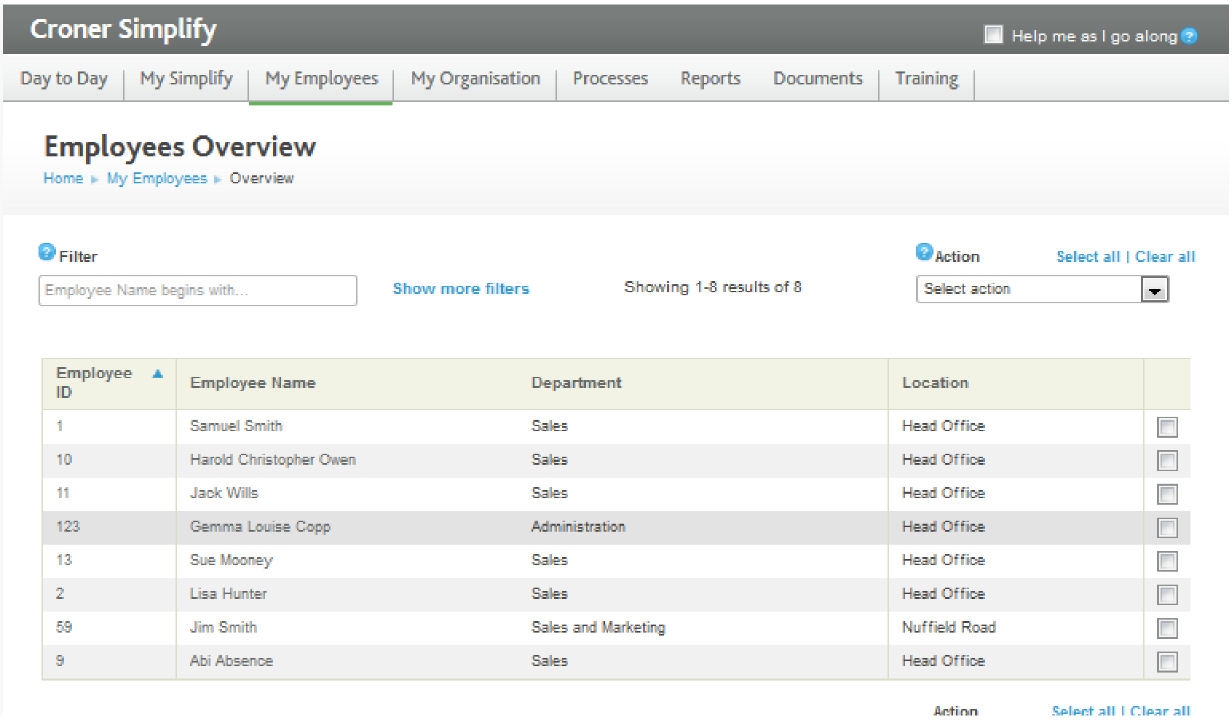
When the holiday has been accepted or rejected an email will be sent to confirm or reject and the holiday confirmed or deleted on the calendar.

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



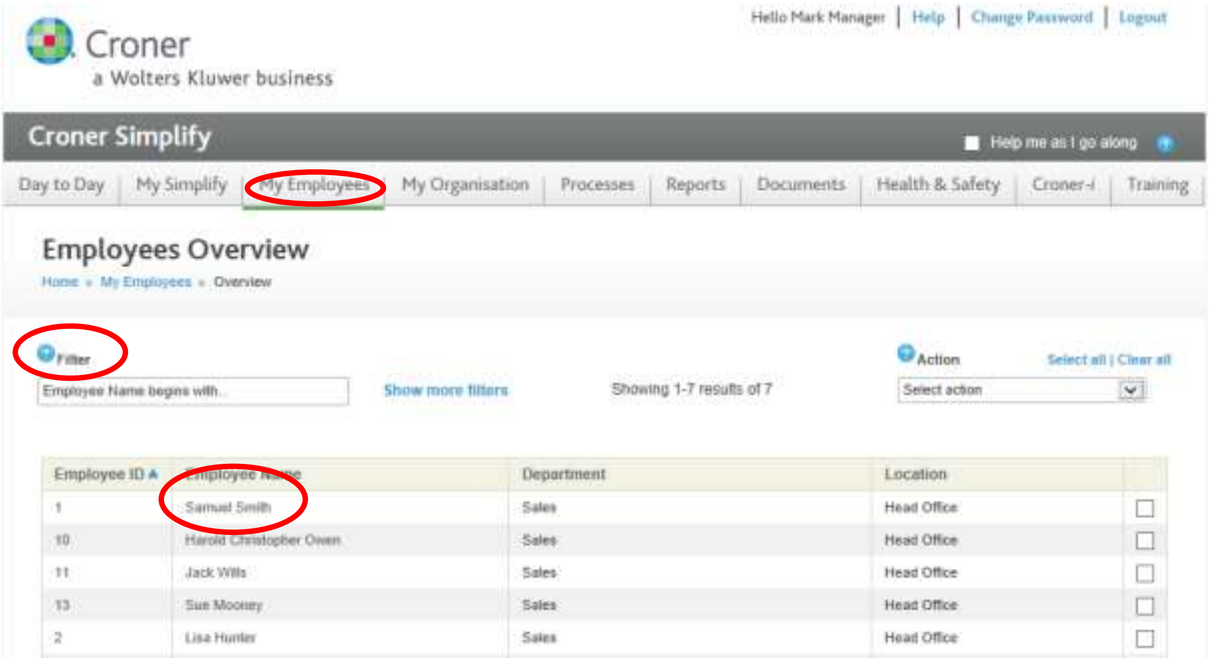
My Employees

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.



Employee Overview

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



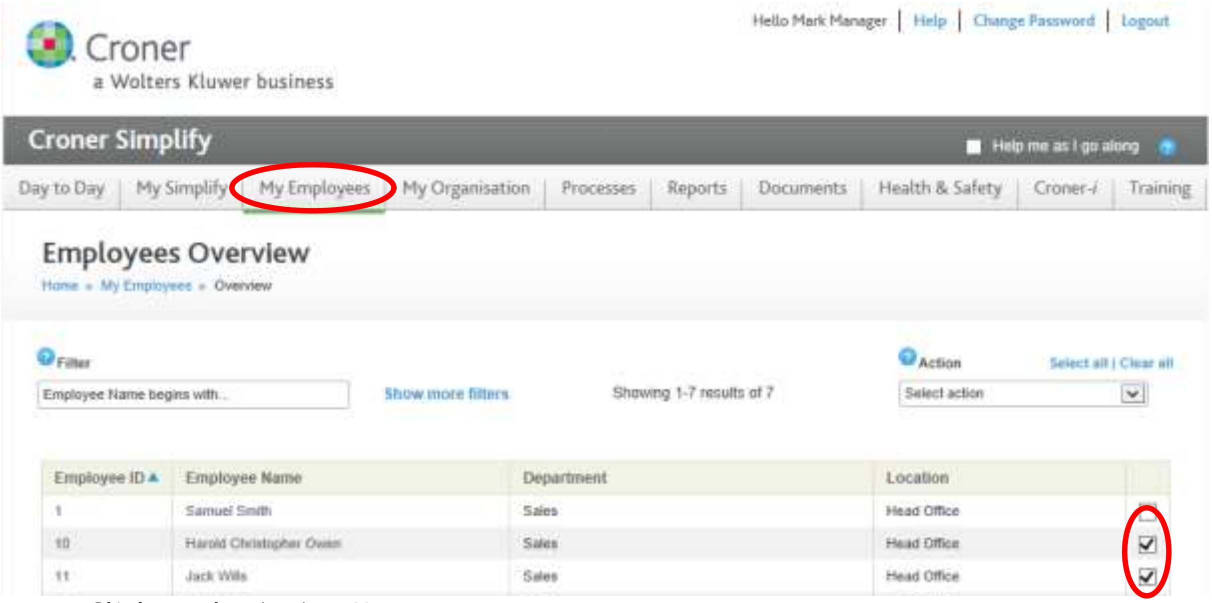
- A list of all of the employees that match the search will be displayed
- Click on the employee's name
- The record opens

The employee's record will be displayed.

Selecting Multiple Users to Update their Records

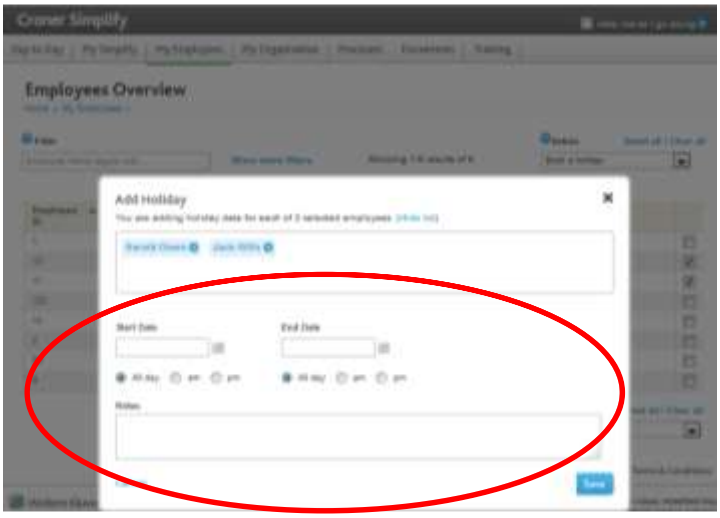
Several employees' records can be updated in one easy action e.g. Booking holiday for numerous staff.

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



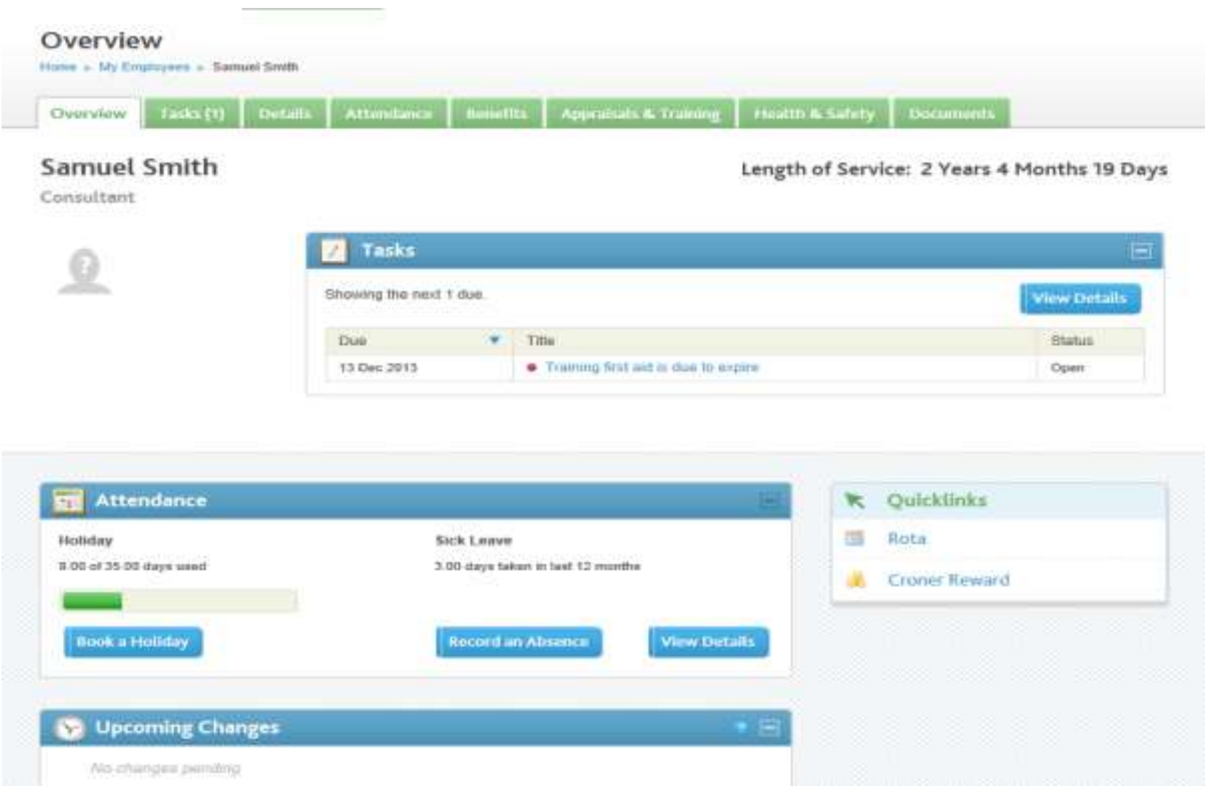
- Click on the **Action Menu**
- Choose **Add a holiday** from the list

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



- 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

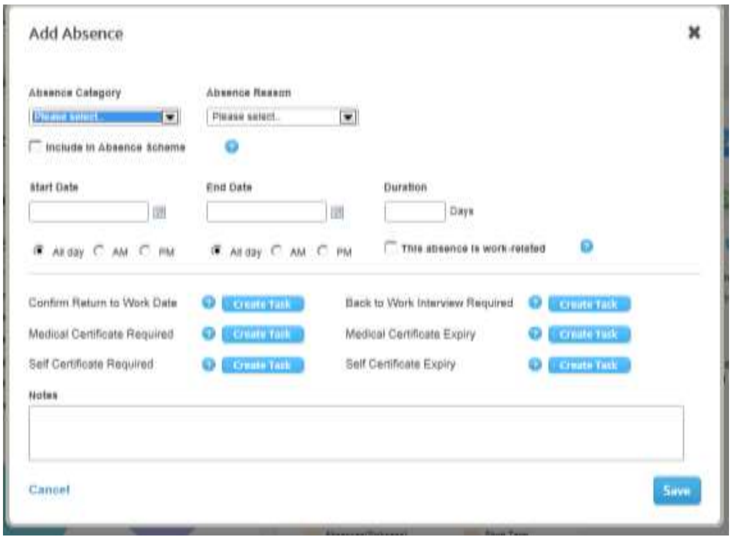
- Click on the blue **Book a Holiday** button
- Add a 'Start Date' and an 'End Date'
- Select one of the radio buttons to indicate 'All Day', half a day AM or half a day PM
- The duration will automatically be calculated taking into account the work pattern of the employee which is set by the Administrator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

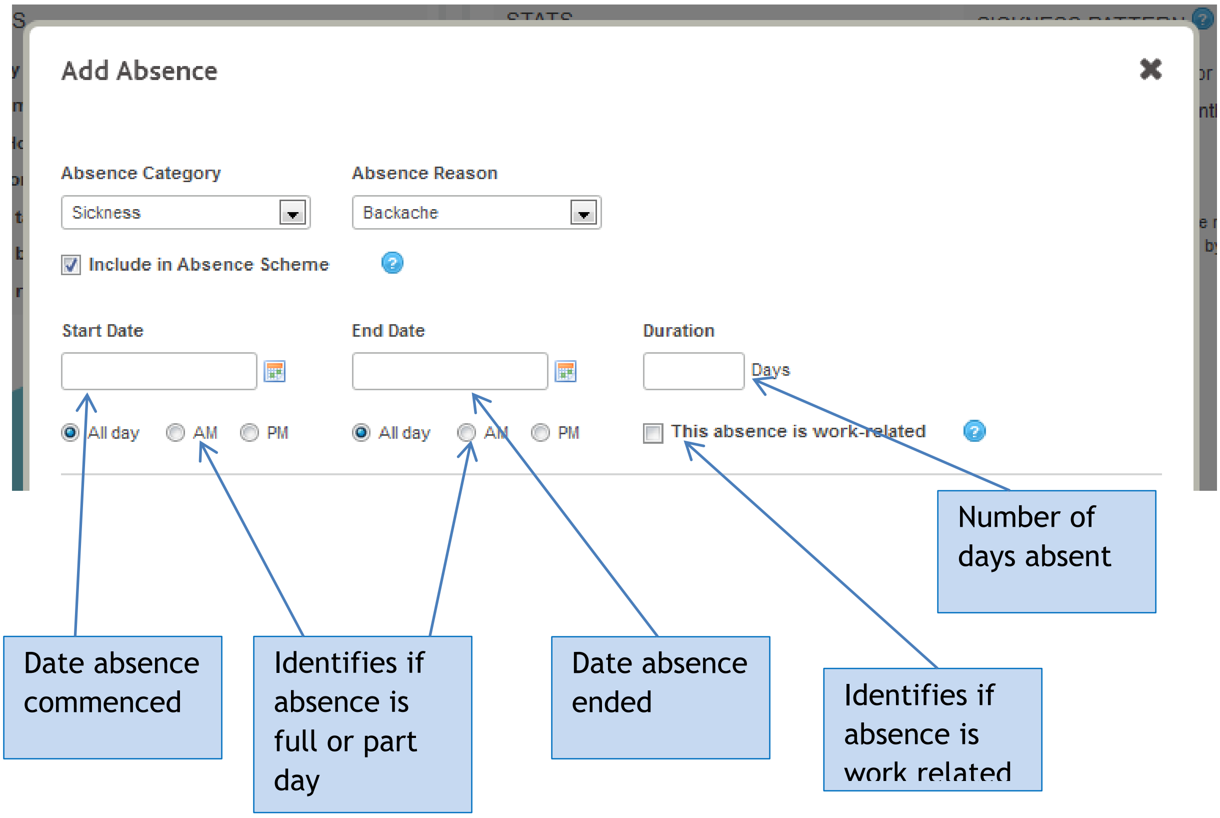
Absences may be recorded using the blue link **'Mark Someone as Absent'** on the Day to Day Tab or in Overview of an Employee record or by clicking directly into the Company calendar on the Calendar tab. Absences can be amended and tracked from within this area. The absence summary states the level of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

- Sickness
- Family friendly
- Other



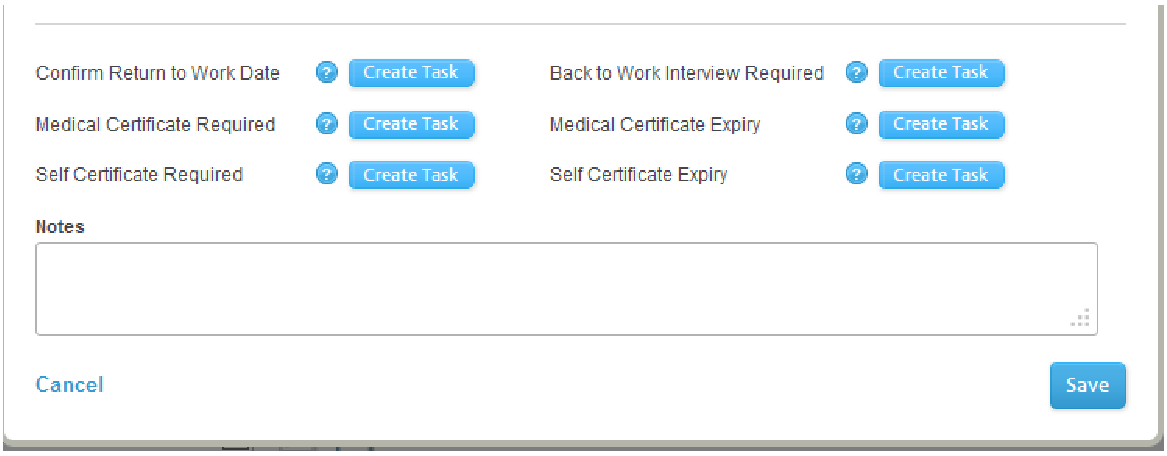
Select the appropriate category.

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



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.

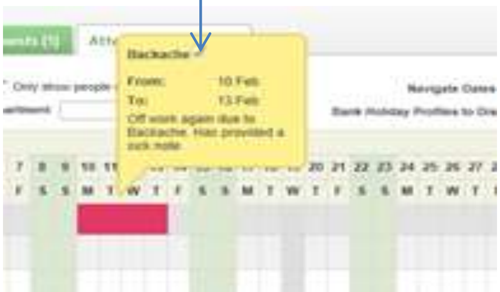
A Manager user is able to create tasks from this area for themselves or the employee.



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]



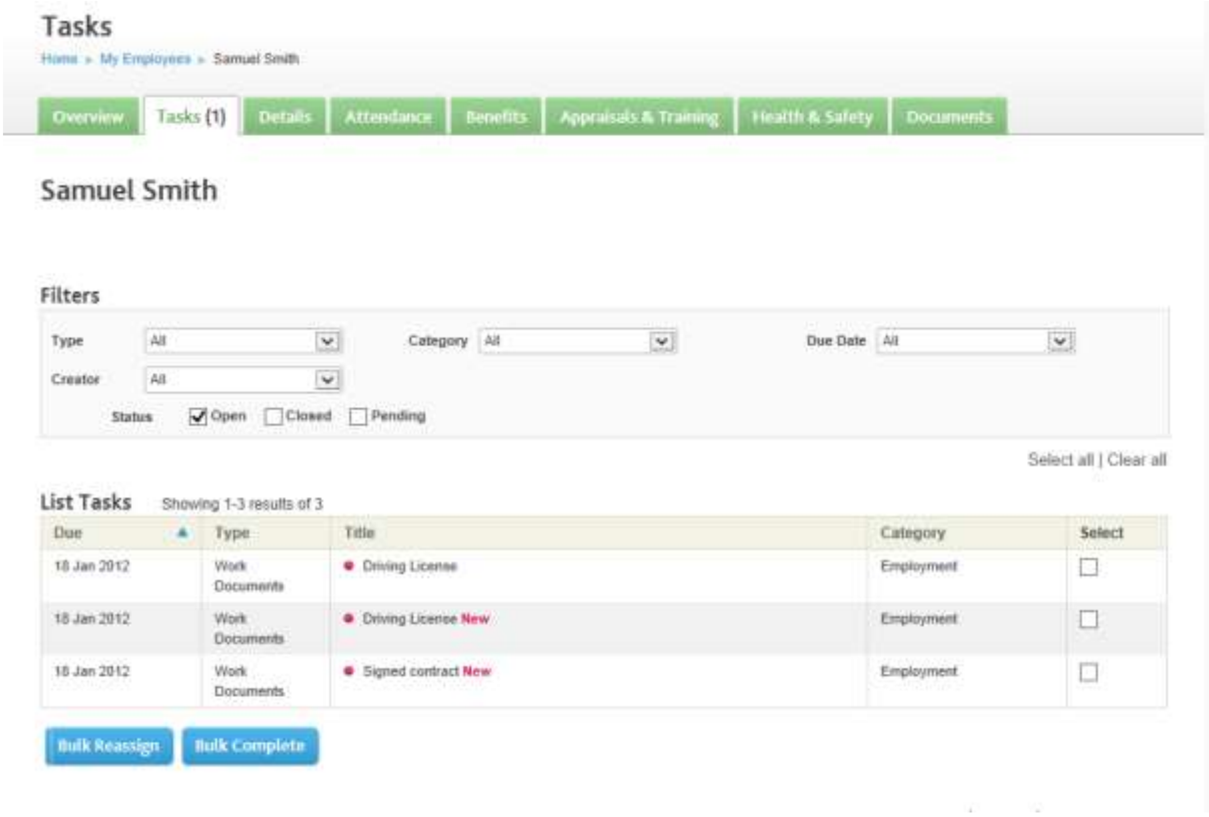
Select Update Task

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.'

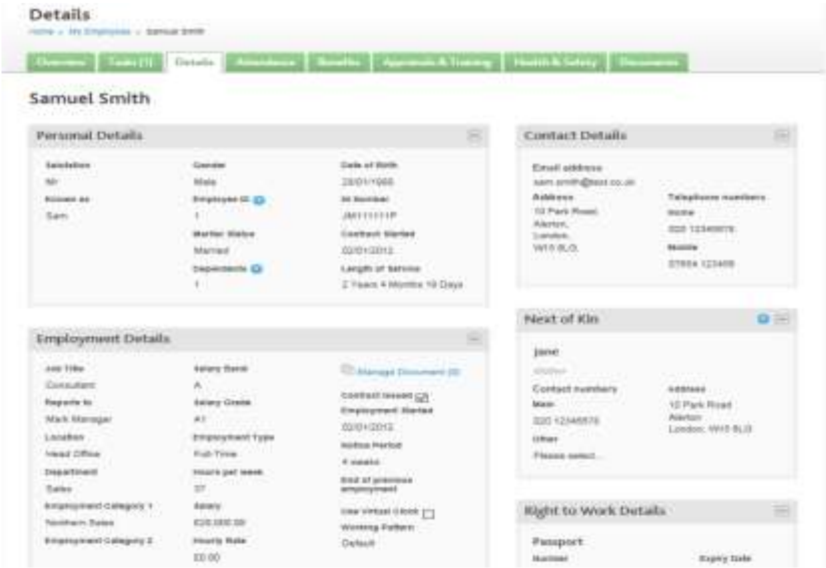
In addition, Administrator or Manager users are able to record an absence from the Summary area of the Dashboard on the Day to Day tab.

Tasks



- 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.

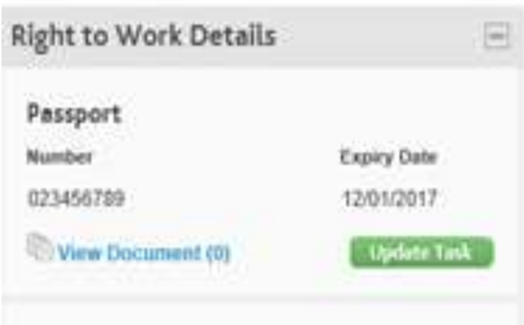
Details



- 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

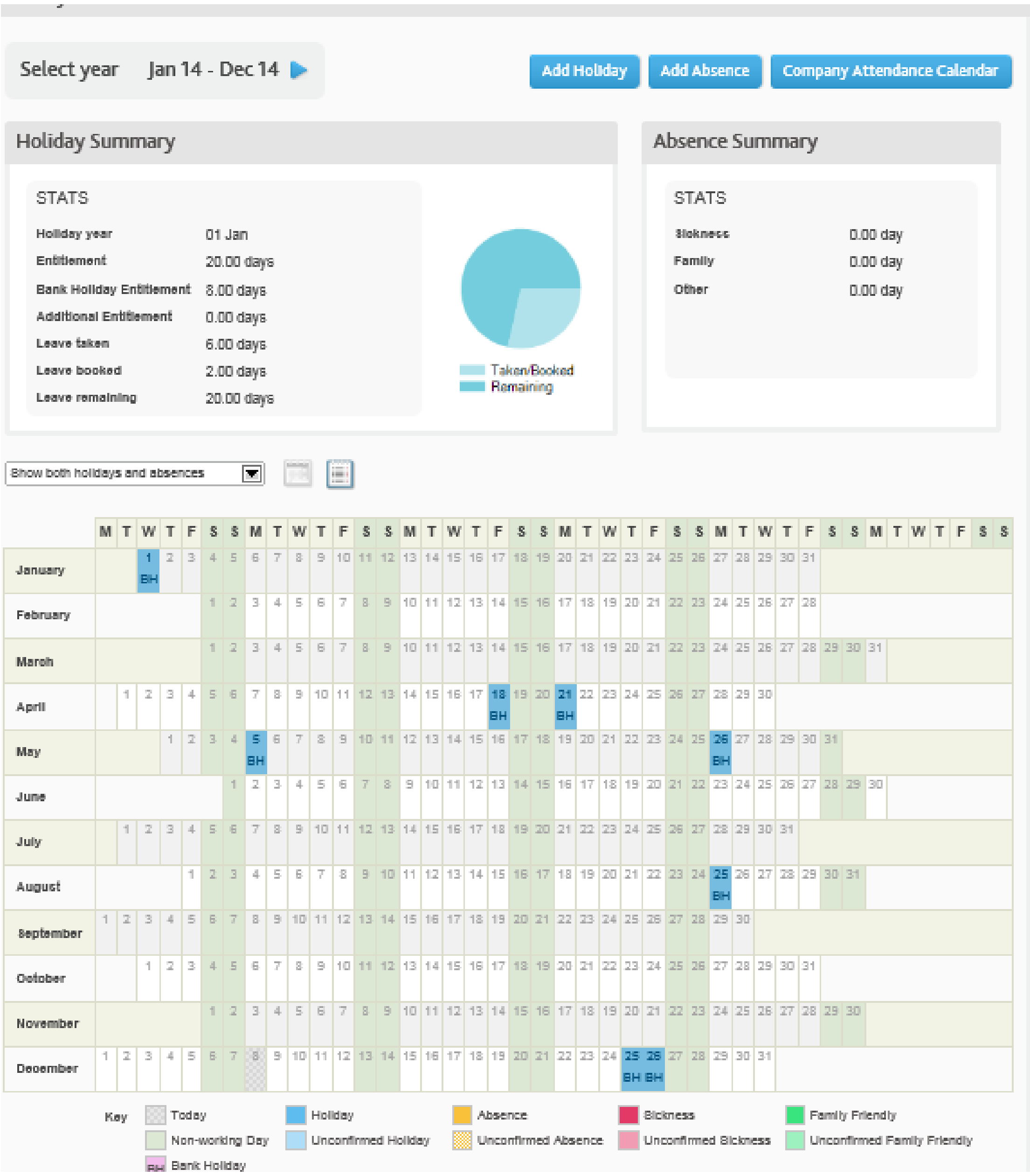
- Employees 'Right to Work' details are stored within this area.



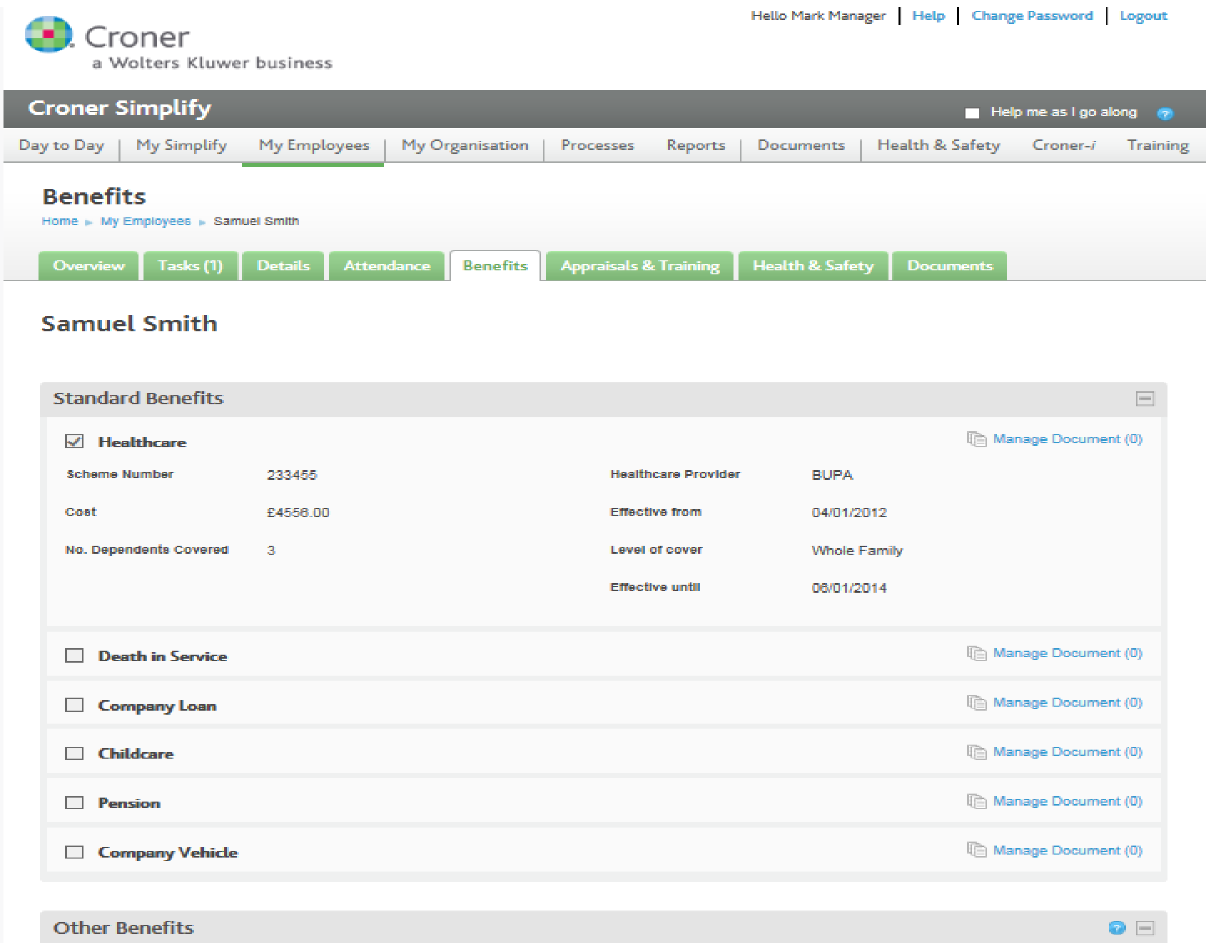
To create a task which will highlight that the expiry date is approaching, click on the **Create Task** button, input to Due Date the date on which the passport will expire. Select who the task is to be assigned to.

Attendance

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



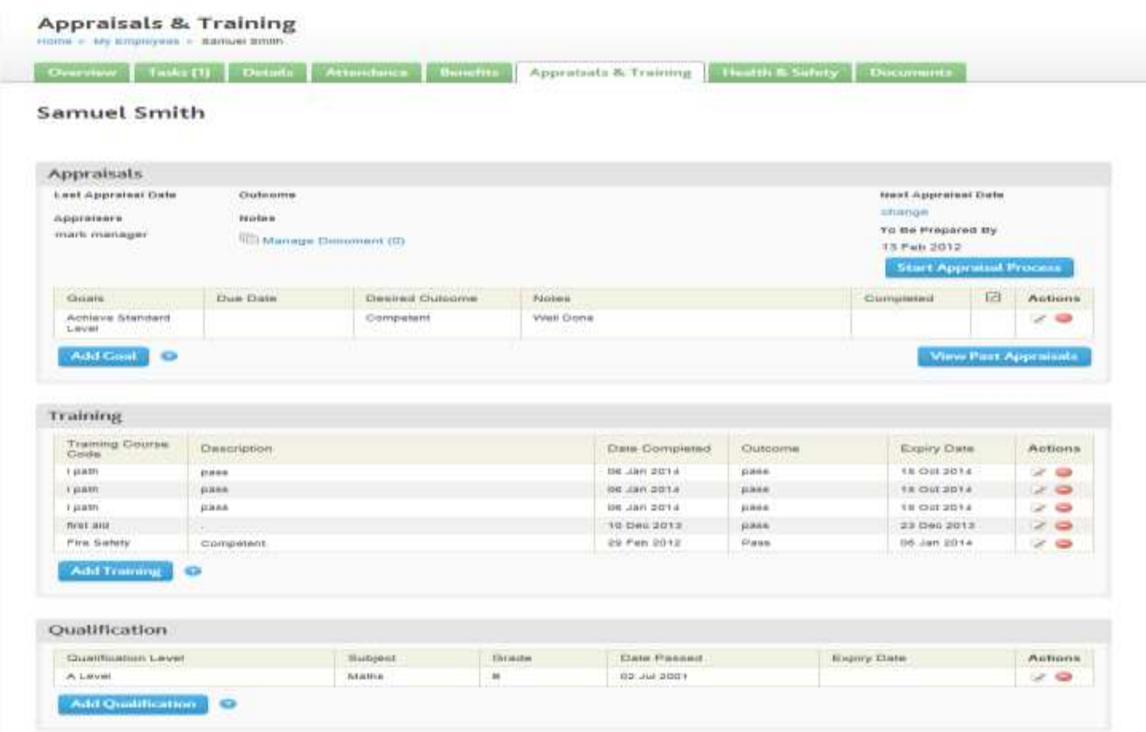
Benefits



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.

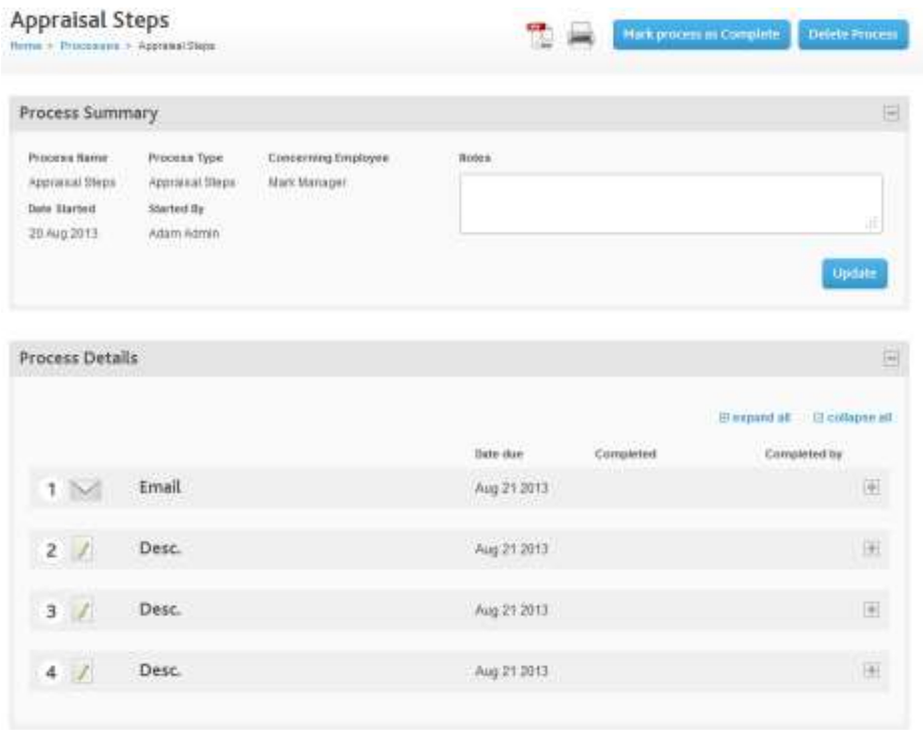
Appraisals and Training



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

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

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



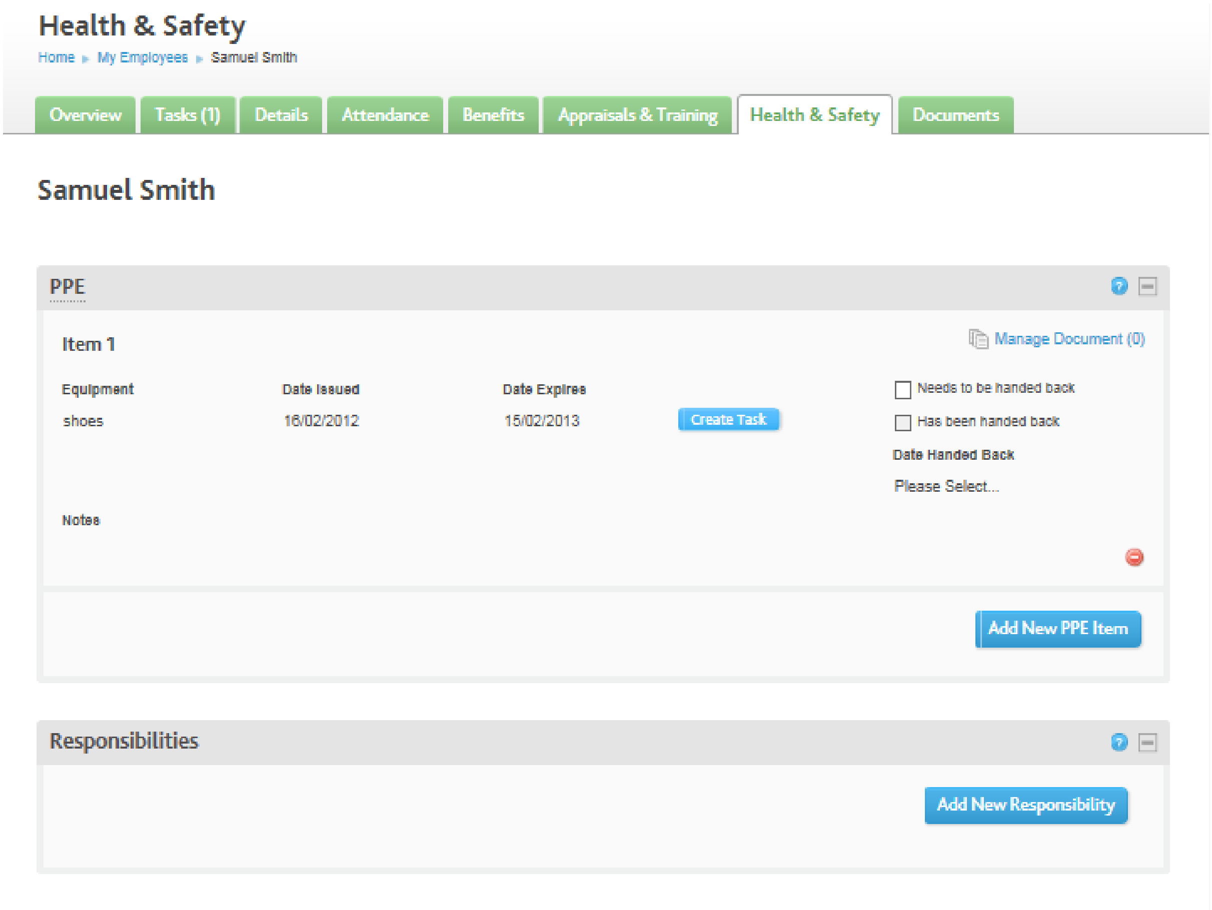
Complete the four steps; the information will be saved to the employee record.

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.

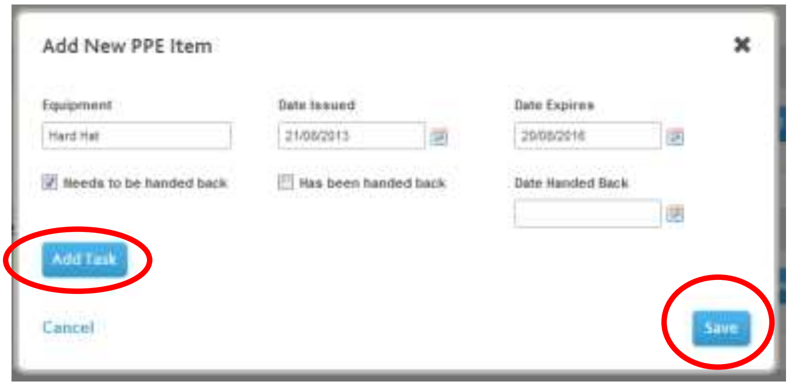
Qualifications – functionality as above.

Health and Safety

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



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



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

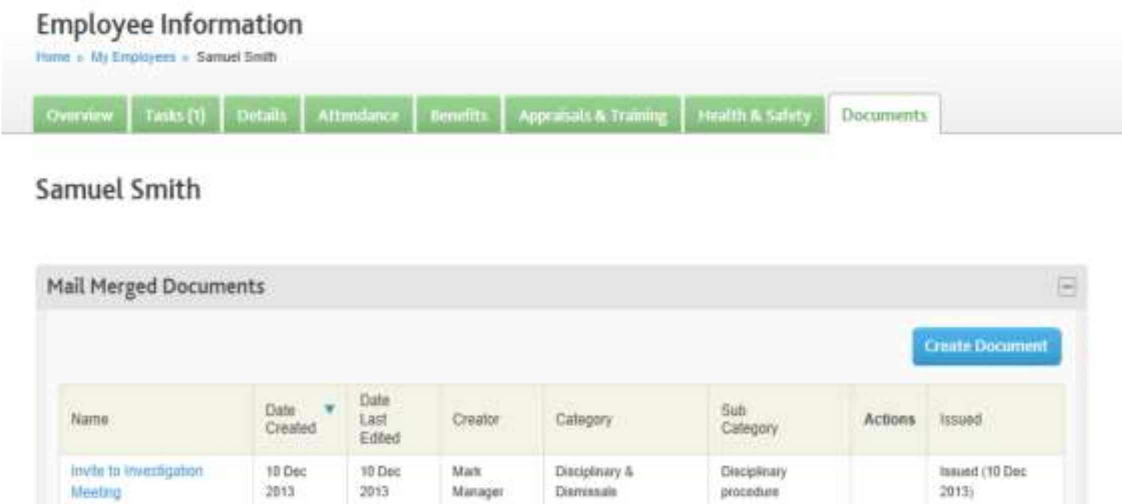
Click **Save**.

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].

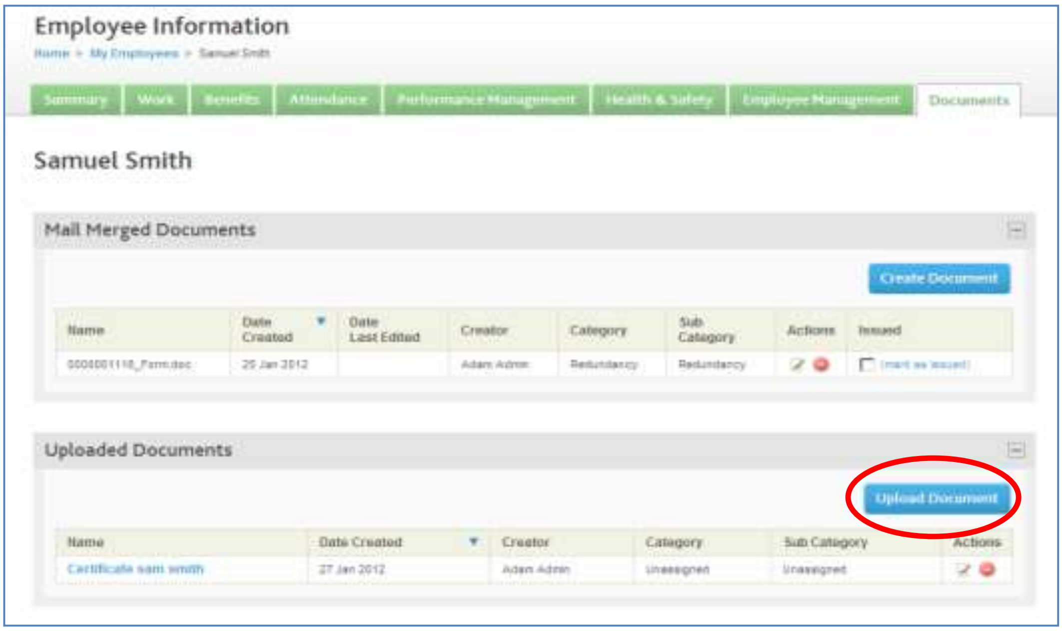
Documents

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.

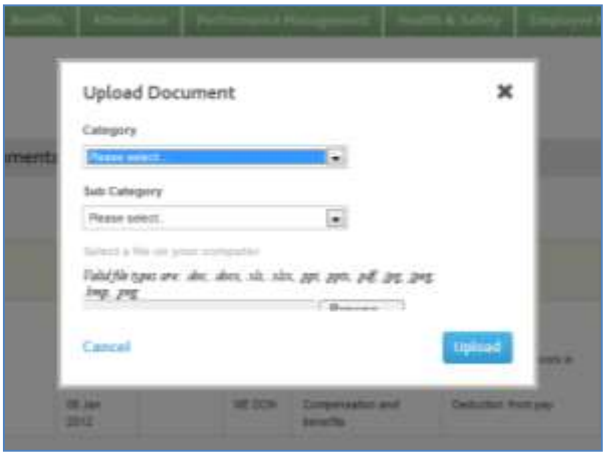
- In the Documents tab click on the **Upload Document** button



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.

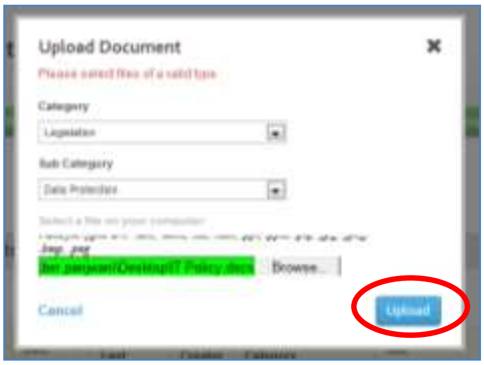


- Choose the Category and Sub Category that is appropriate to the document that you are about to upload



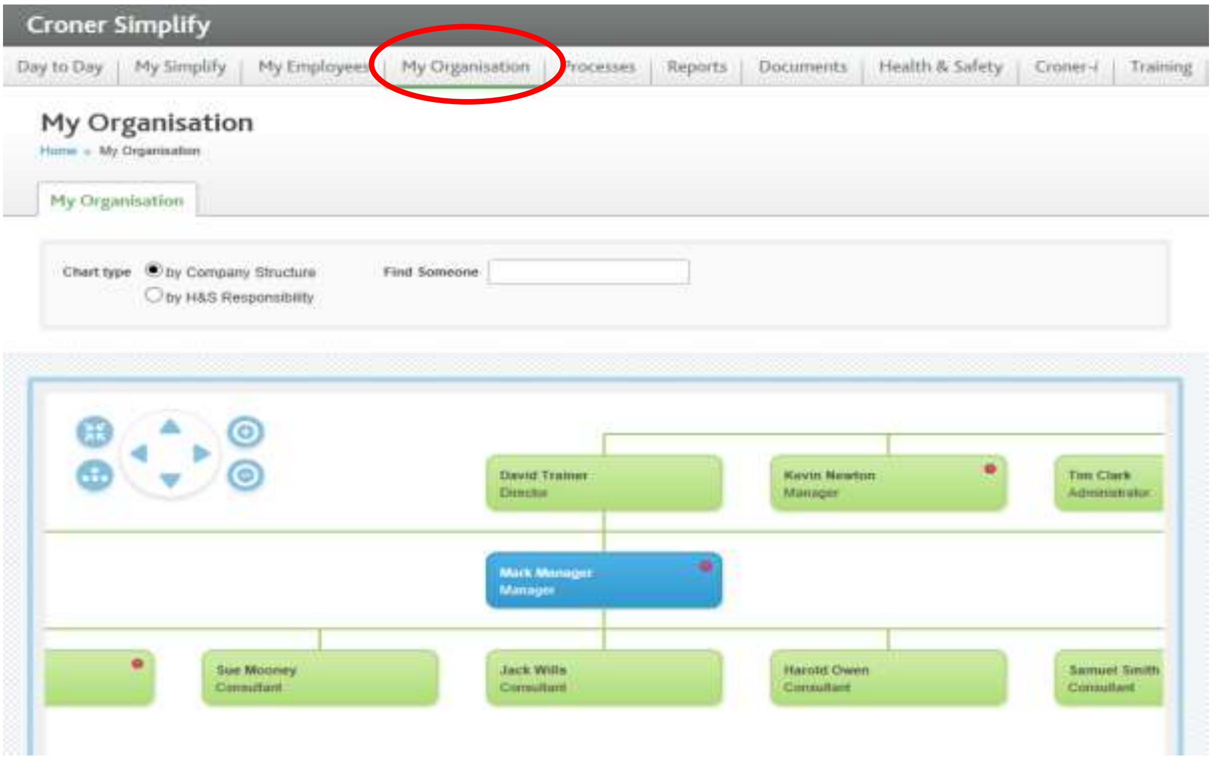
- Click the Browse button and select the file to upload
- Click **Open**

- Click **Upload**



My Organisation

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



- 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.

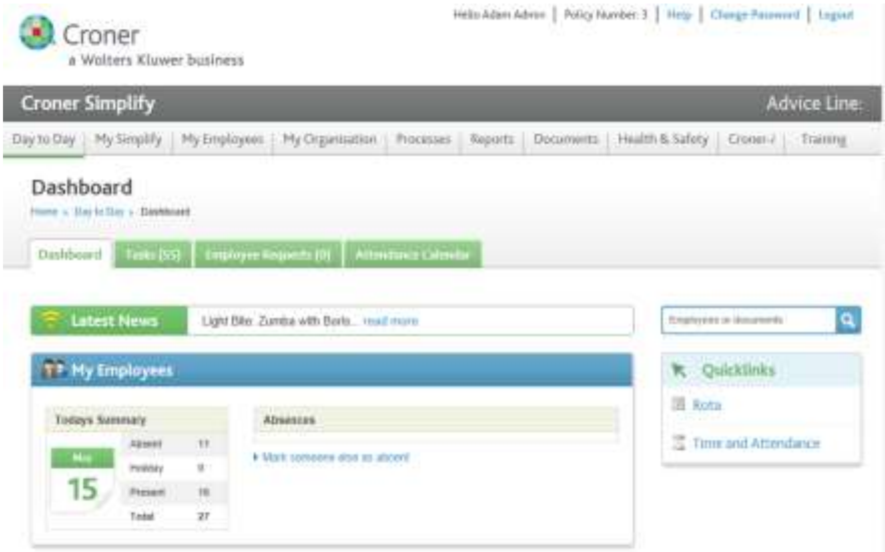
The organisation chart is automatically created when reporting lines are set within the Work tab of an employee record.

Processes

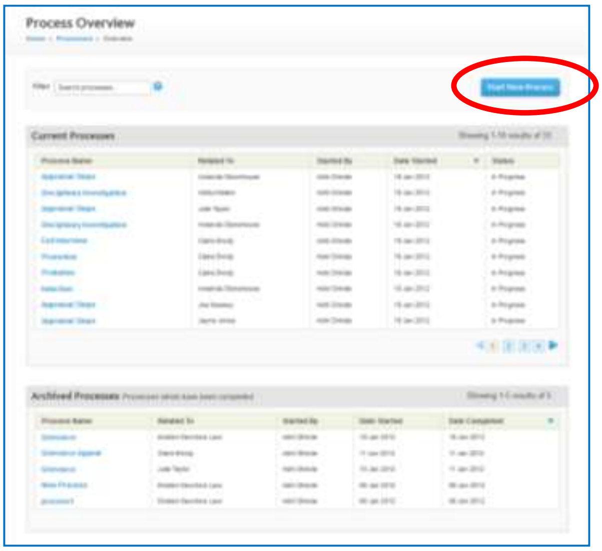
It is important that correct procedures are followed and in Simplify standard processes are available which guide users through fair and thorough investigations to ensure minimised risk of disputes and tribunal claims. One example process is the **Disciplinary Process**.

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

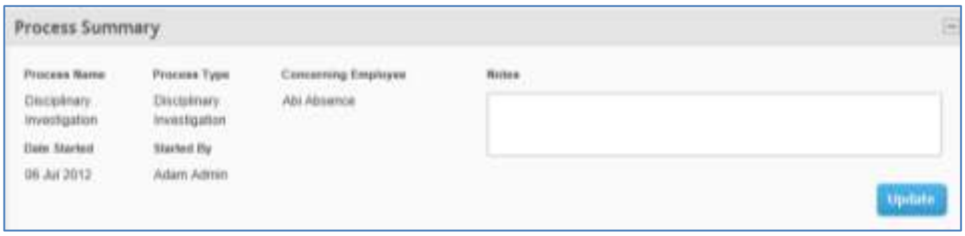

Process Overview
Current Processes
Archived Processes

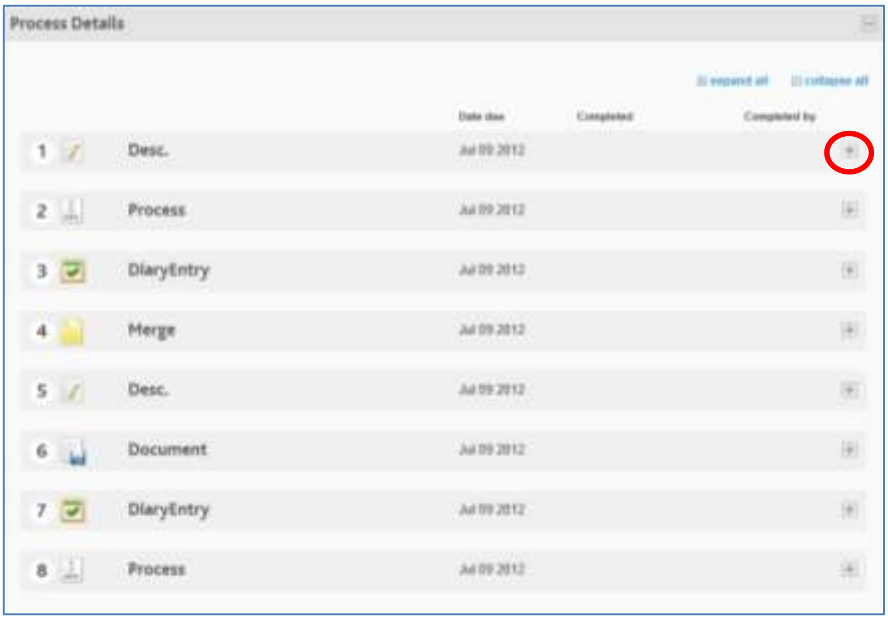
- The following dialog box will appear.

- 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)





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:

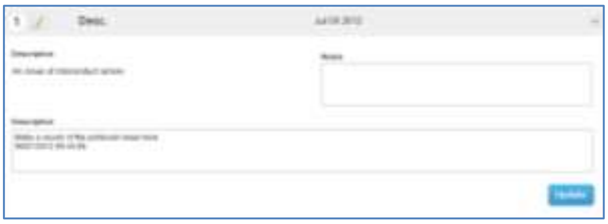
- Checkbox
- Merge
- Process
- Task
- Email
- Description
- Document
- Diary Entry

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

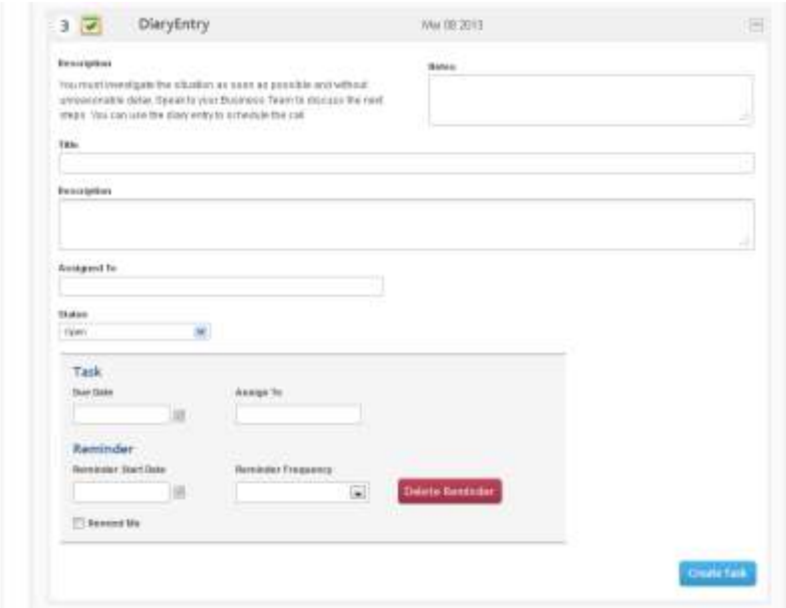


Step 2 is an example of a Process Step. Build processes within processes. In this example of a Disciplinary, at this stage activate the Suspension Process and carry this out as part of the Disciplinary process.

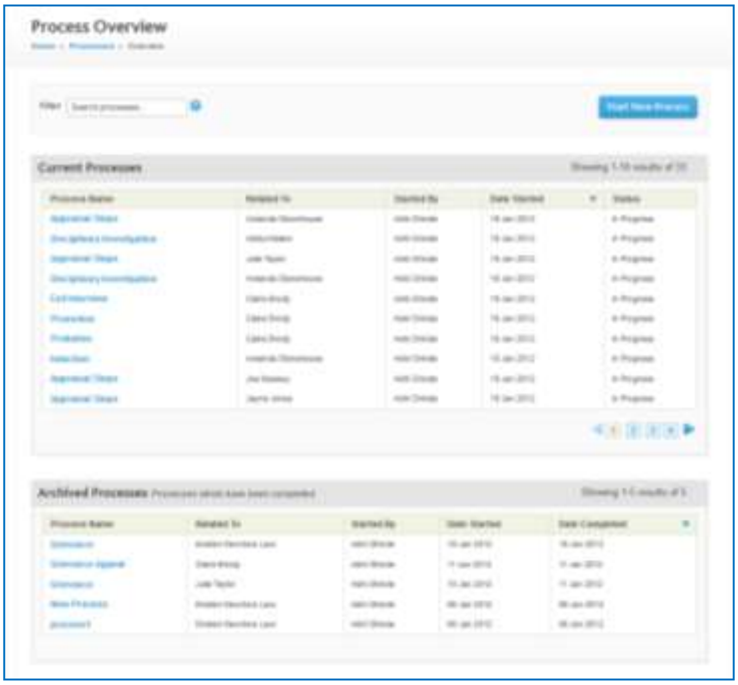
- Click on the button **Access Process Steps**
- When complete, click on the checkbox to mark the step as being completed.
- Click on **Save**

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.

Step 3 is a diary step.

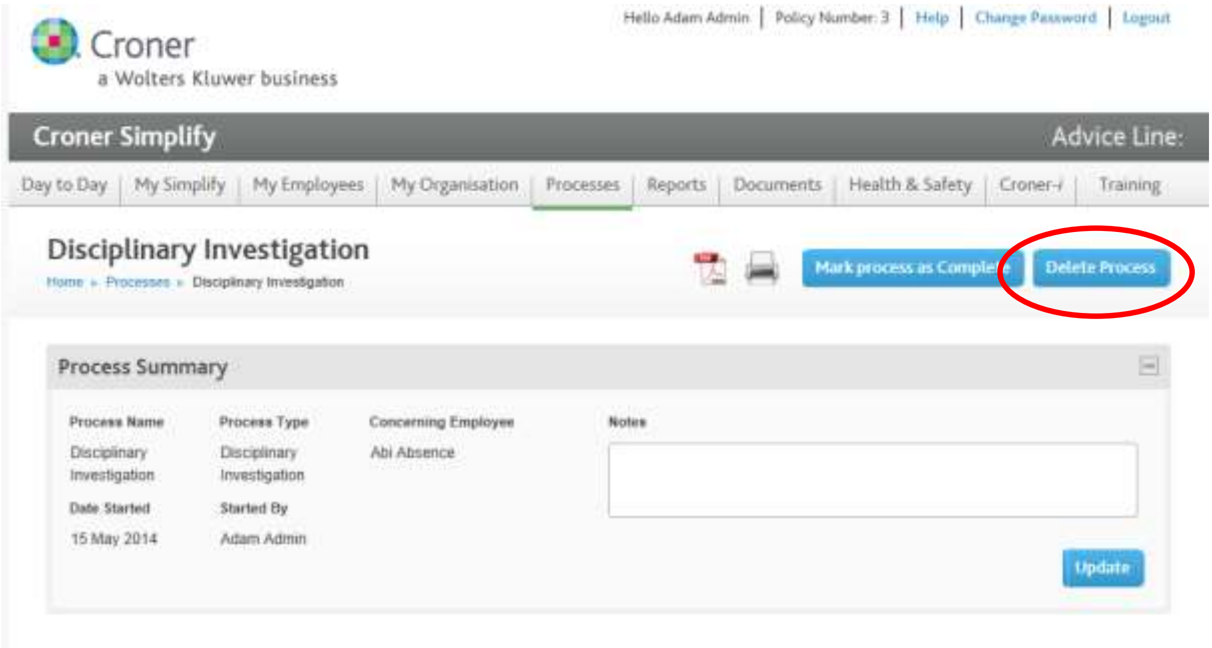


When all steps in a process have been completed mark this process as complete. This marks the end of the process and the process will be archived to the Archived Process area – see picture below.



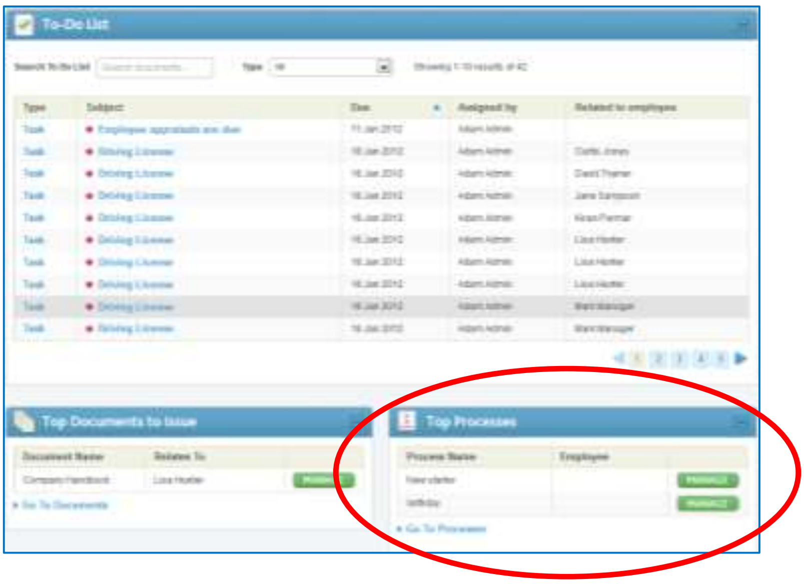
To re-open a process that's been archived:

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



Viewing Processes

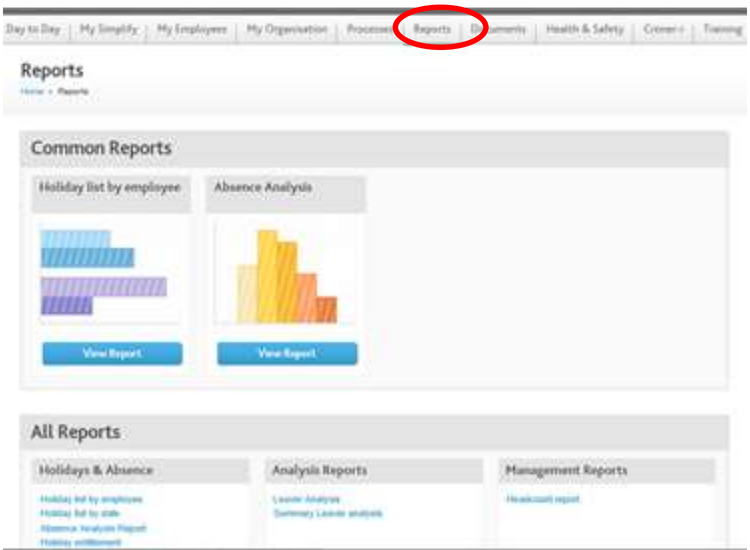
An Administrator will see a section called Top Processes on the Day to Day page when logging in.



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

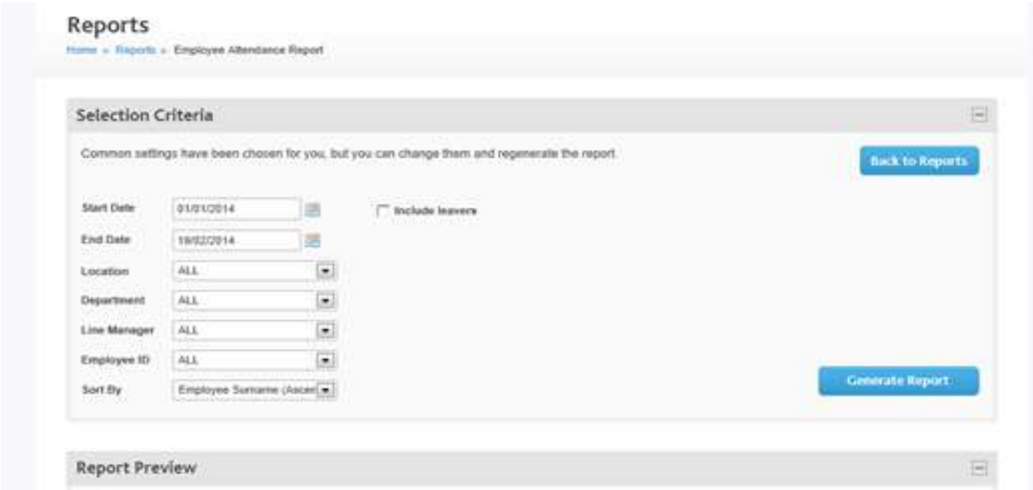
The two most common reports are highlighted at the top of the screen. Click on the View Report button to run one of the top 2 reports

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

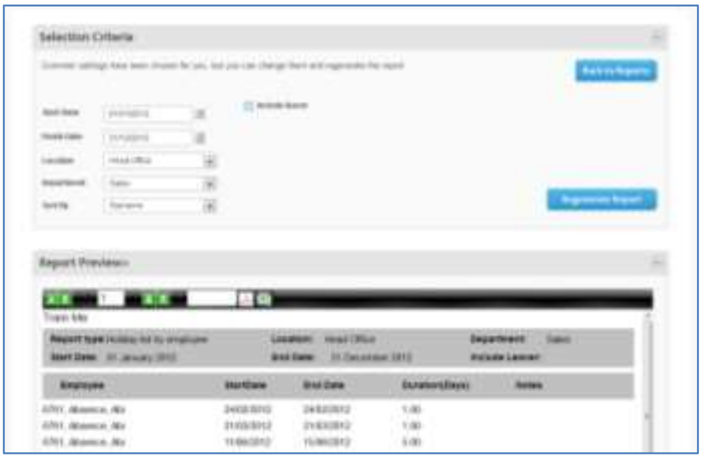
Filtering your reports

There is an option to view the holiday for employees by relevant department. To change the report, select an option (either tick box or drop down arrow) in the **Selection Criteria** area and click on the **Regenerate Report** button.

In this example change the Location field to Head Office and the Department field to show only those employees in the Sales Department.

- Click on the down arrow of the Location field and choose **Head Office**
- Click on the down arrow of the Department field and choose **Sales**
- Click on the **Regenerate Report** button

The results are filtered in the **Report Preview** area of the screen



All Reports

The **All Reports** section shows all the standard reports in Simplify

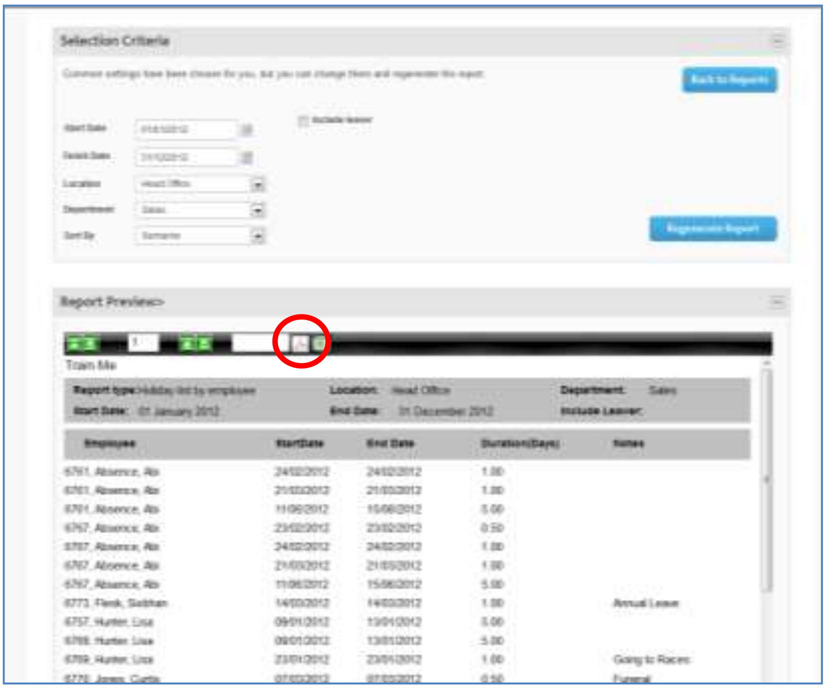
The standard reports are explained in sections: *Holidays & Absence*, *Analysis Reports*, *Disciplinary & Grievances*, *Management Reports*, *Pay & Benefits*, *Time & Attendance*. To run one of these reports, click on the name of the report and fill out the relevant criteria and click Re-generate Report

Printing and Exporting

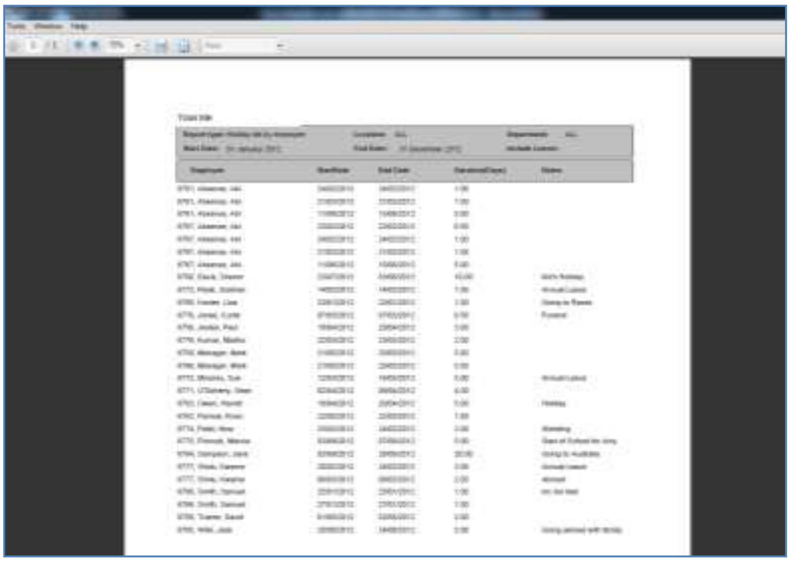
To print your report and/or export it to Microsoft Excel for further analysis:

Printing

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

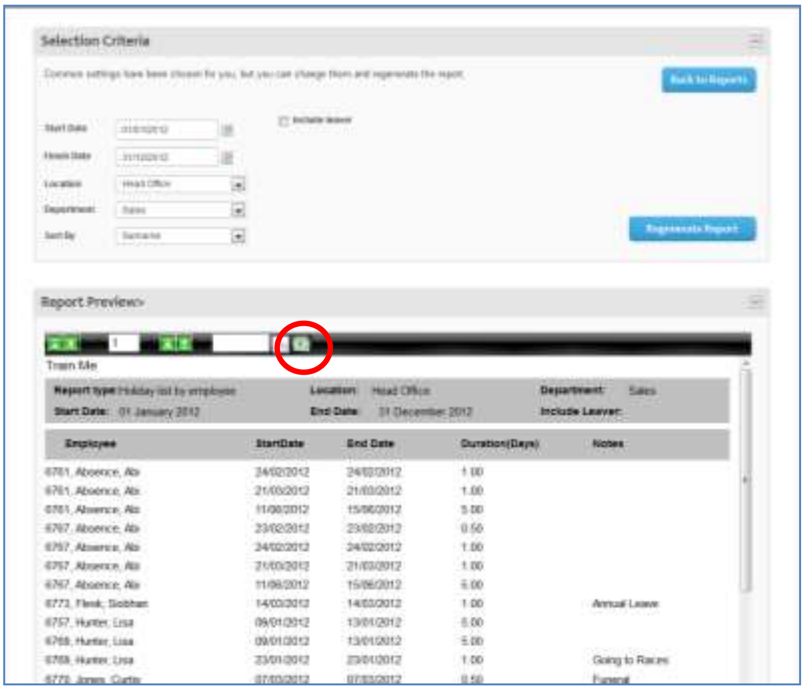


- Click on the print icon to print the report



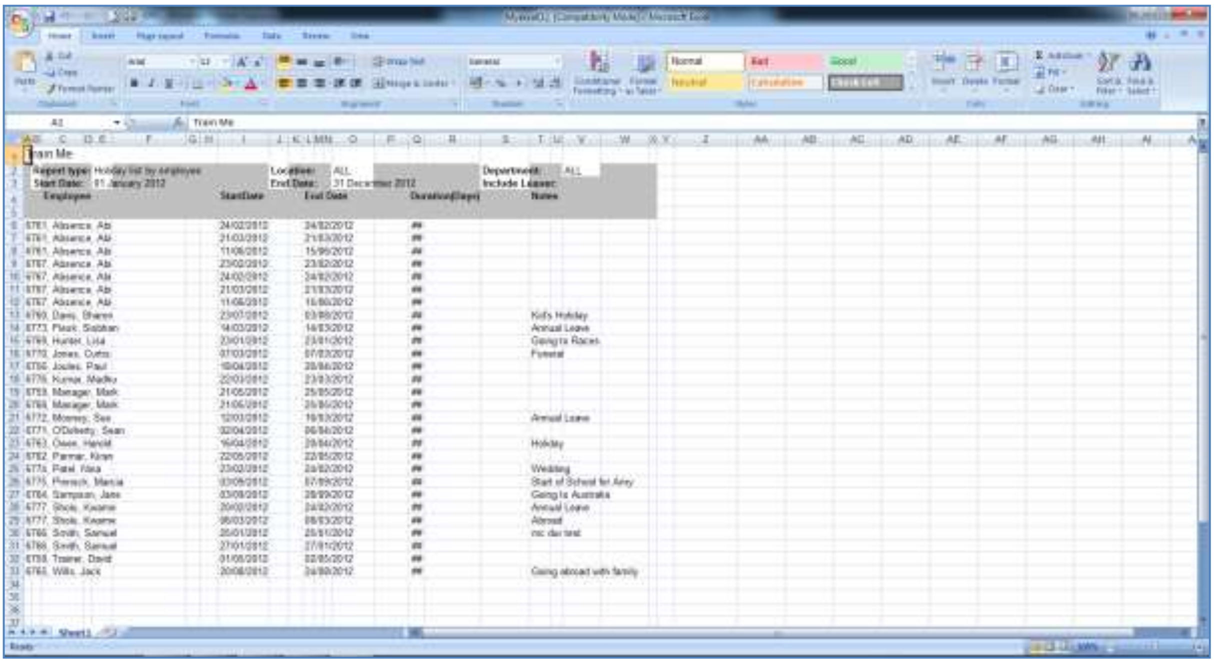
Reporting

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

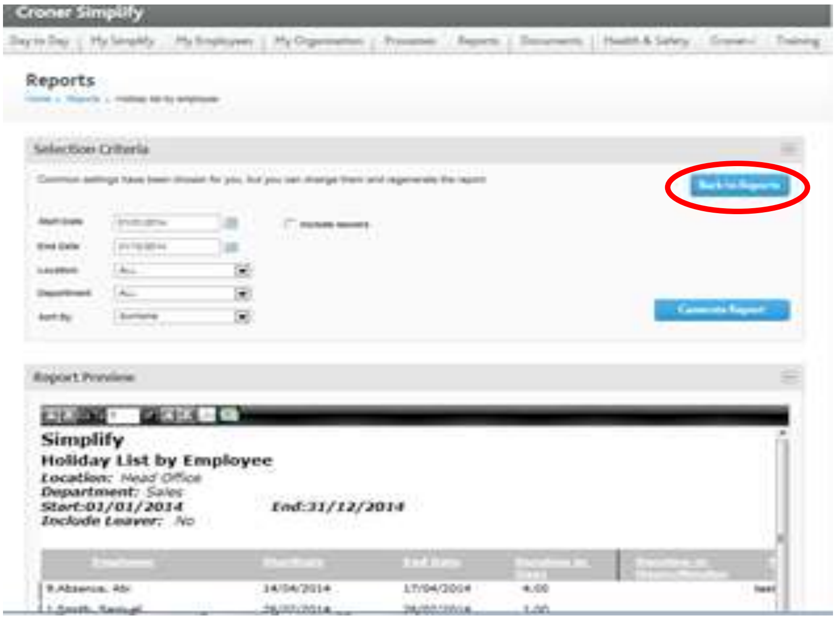


- A dialog box will appear. Click on the Open button to view the report in Microsoft Excel

- 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.



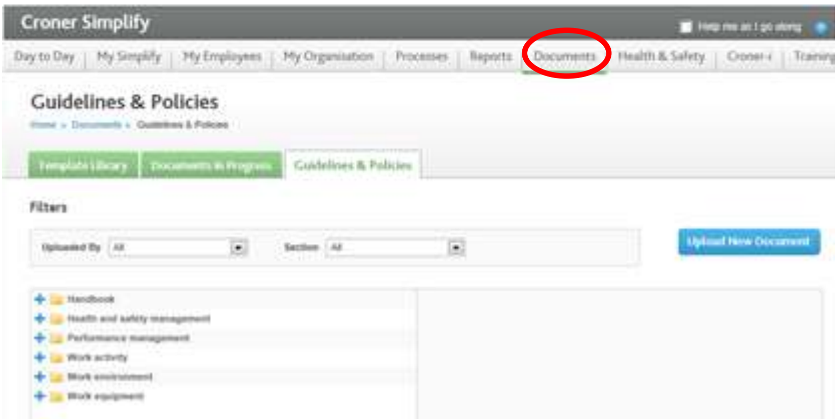
- To run further reports click on the **Back to Reports** button



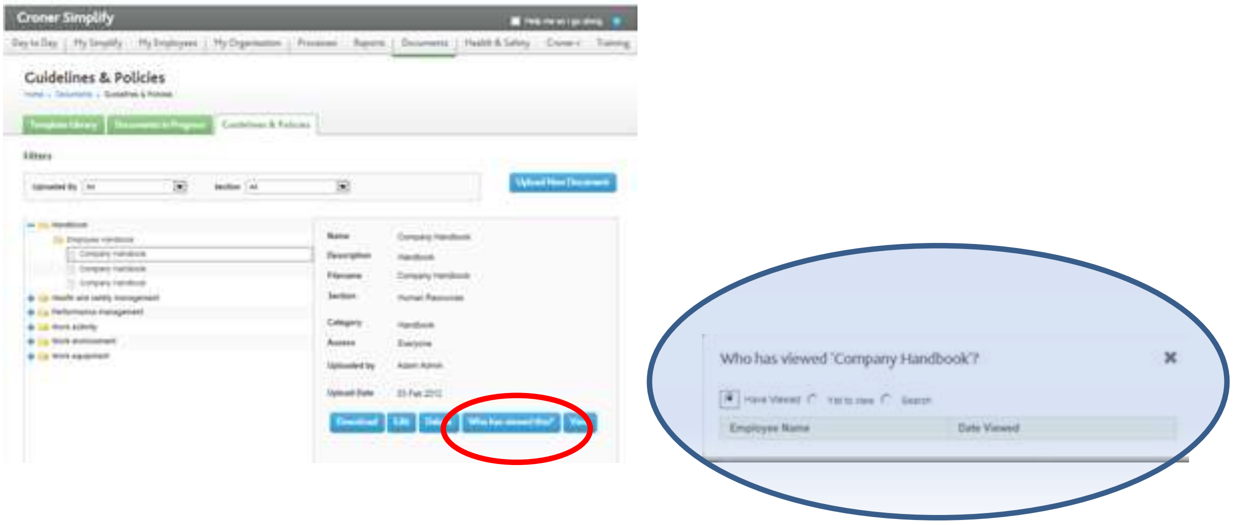
Documents

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.



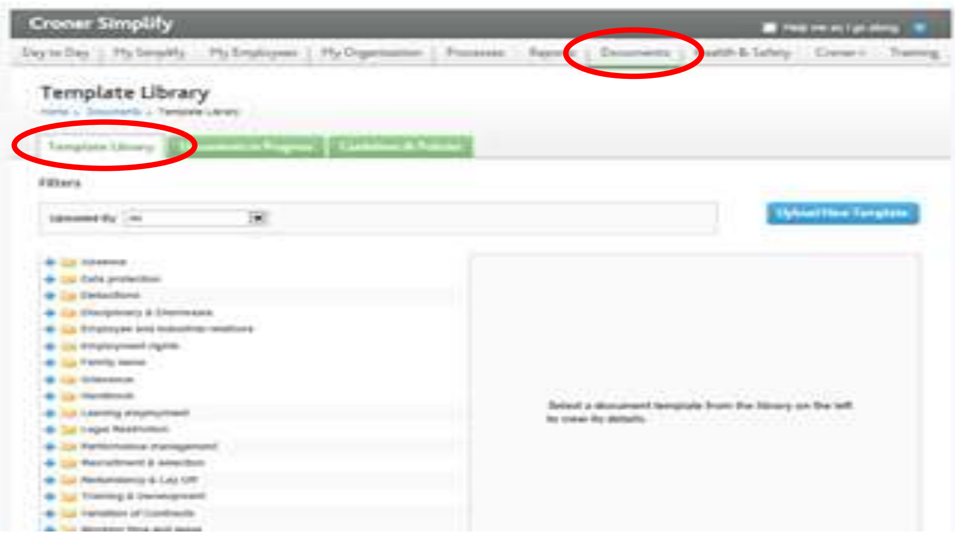
If you have been given permission to edit and create documents then the sections below will apply.

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

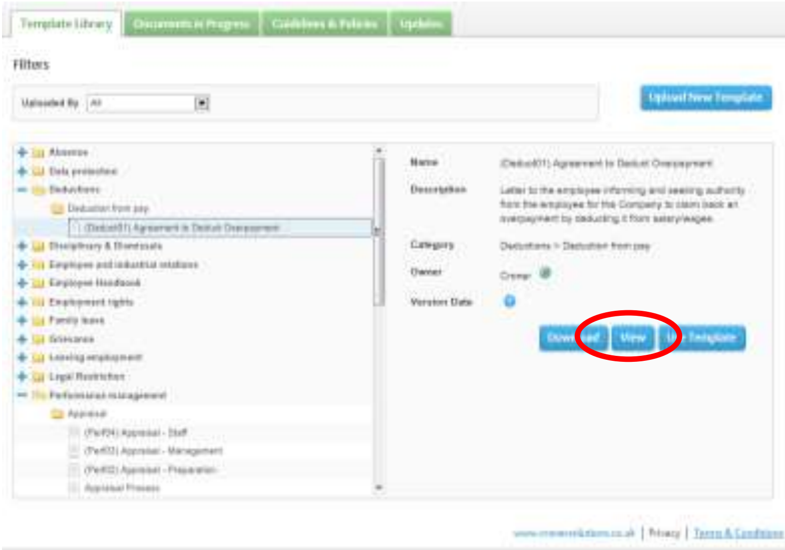
- Click on the **Documents** tab



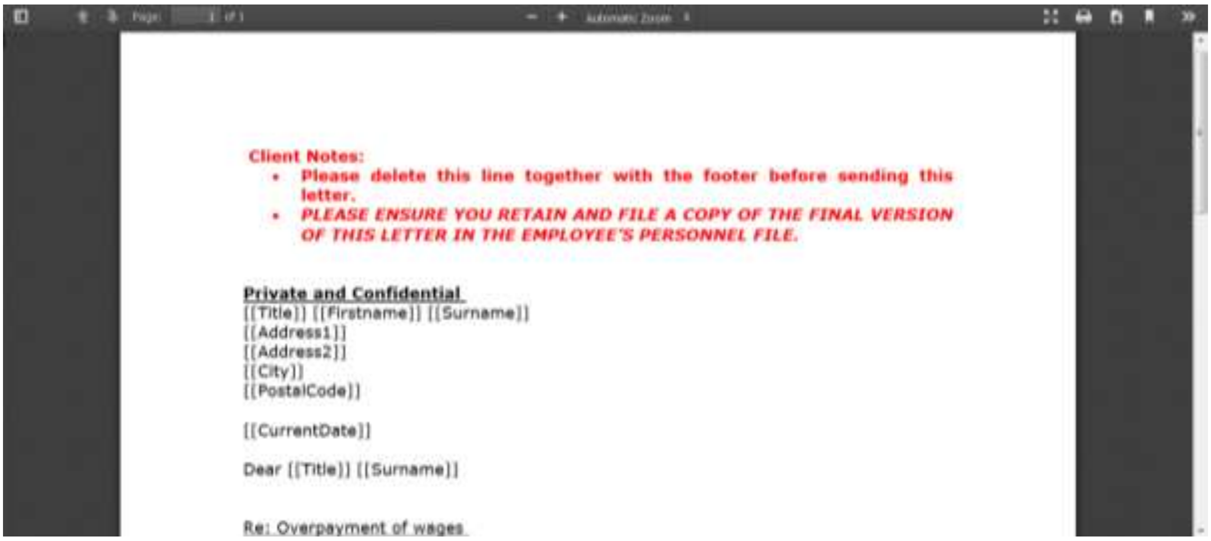
- Click on the **blue plus sign** to expand a group
- Click on a **yellow folder** or its name to expand the folder

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)



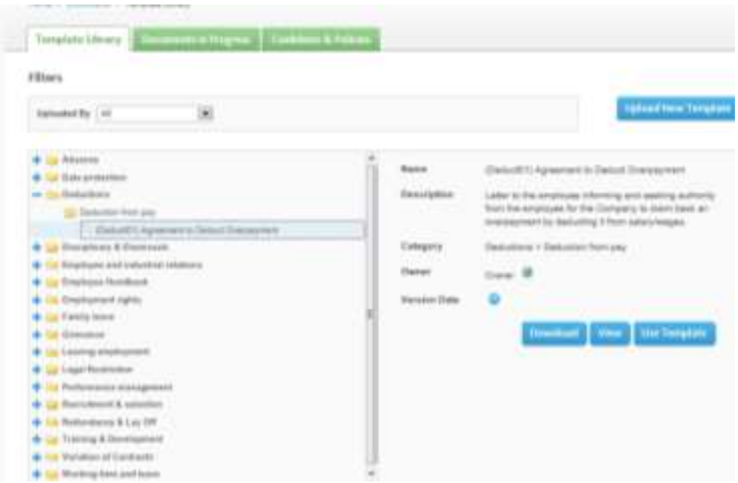
- The document that opens is a Croner template with 'Client Notes' appearing in red and merge fields appearing throughout the document. When using this template the correct employee information will appear in place of the merge fields, e.g. **[[Title]] [[Forename]] [[Surname]]** will be replaced with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



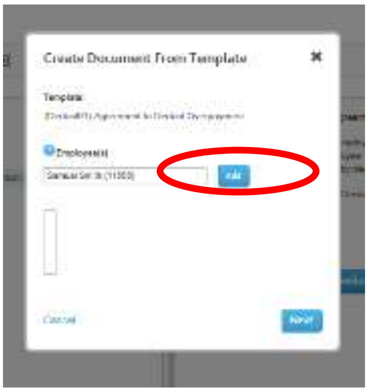
- Close the AceOffix plug in

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**

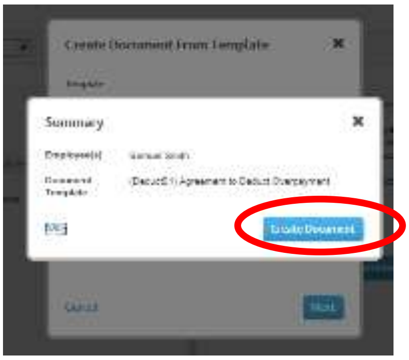


To send a template document to multiple employees, type employee names into the Employee(s) field and click on Add. Repeat this step until your list is complete and in the Employee List Area.

- Click **Next**

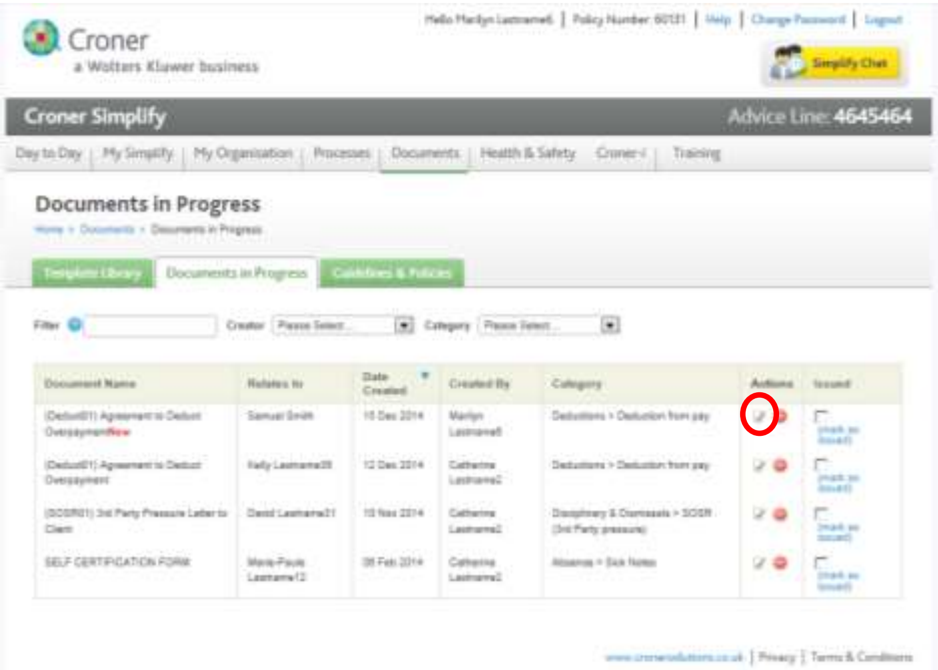
A summary box appears

- 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:

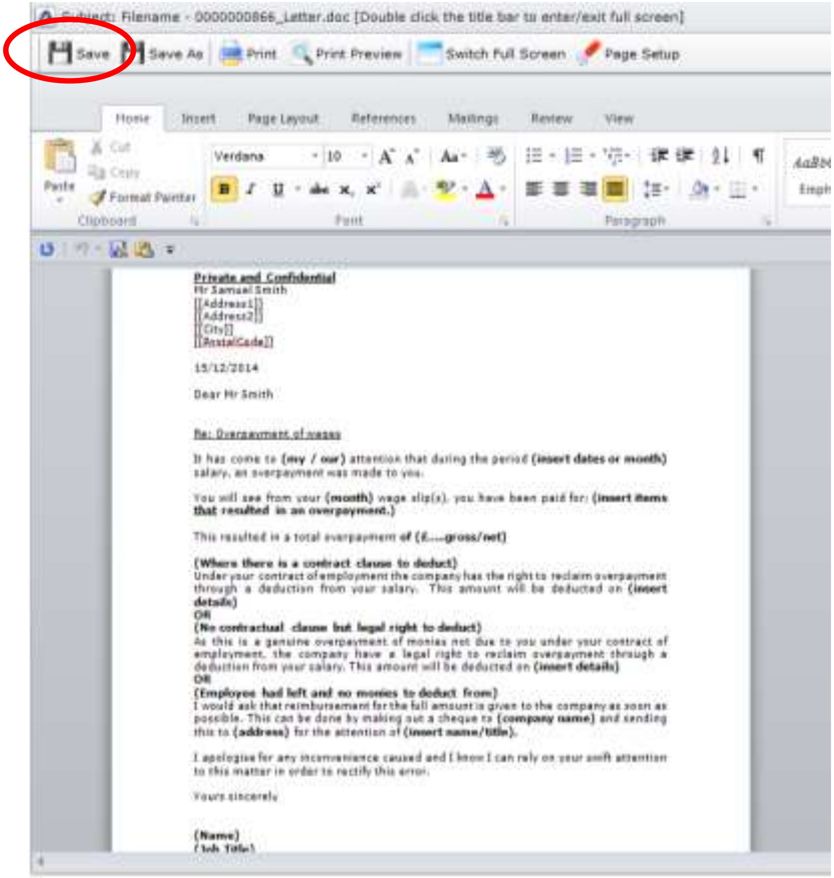
- Click on the **Edit** button to Open the Document in Edit mode



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.

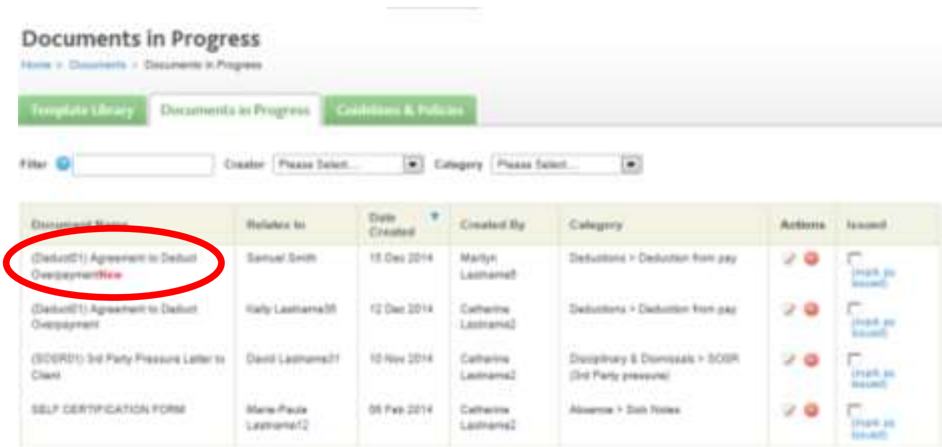
Ensure that users:

- 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



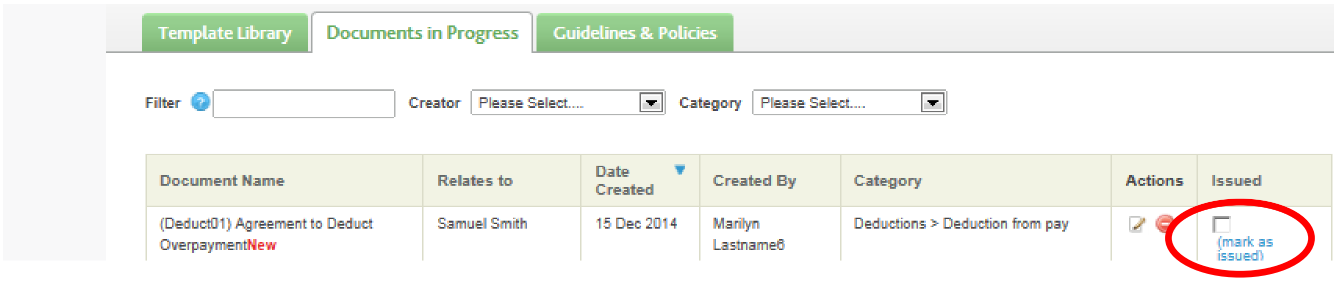
When the document is complete:

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



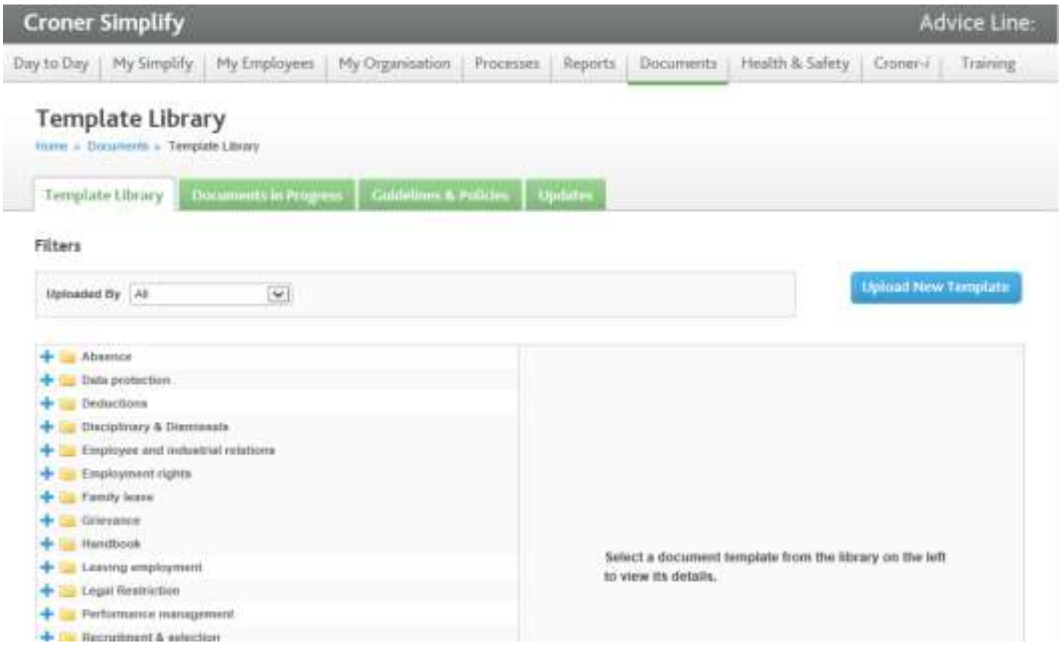
Sending the document to the Employee(s) - Self Service-Users ONLY

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.



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:

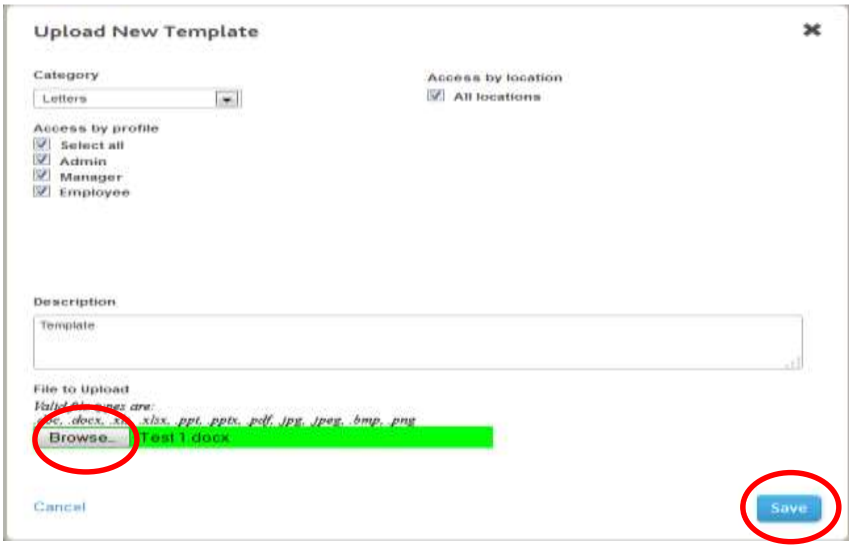
- Click **Upload New Template**



-

- The following dialog box appears -

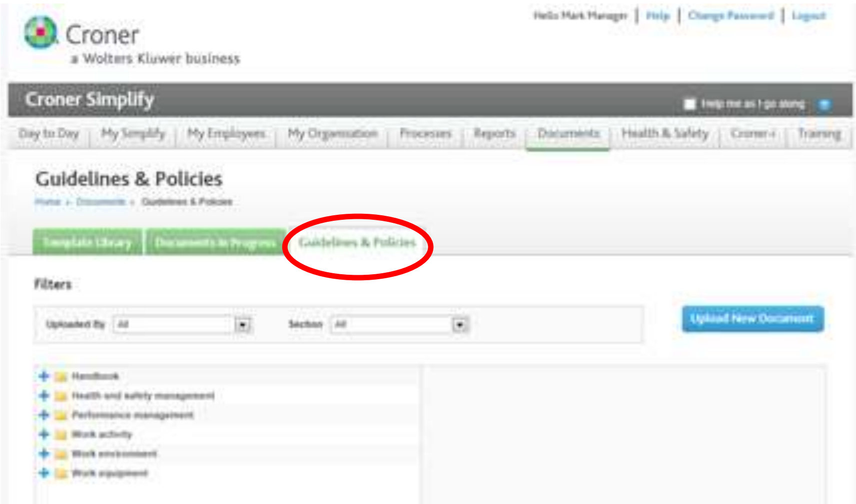
- From the Category drop-down field, choose the most appropriate category for the template you are uploading.
- The **Access by profile** area allows the template to only be visible to a particular user type. The **Access by location** area also allows the templates to be restricted by location. This 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**

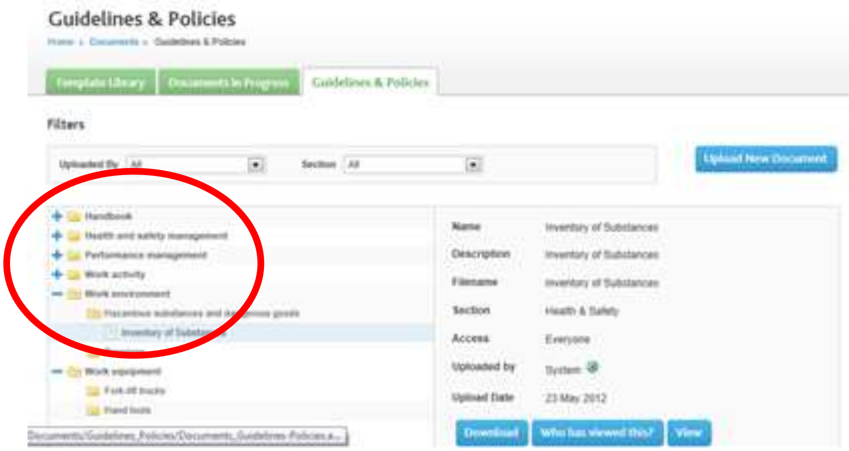
Guidelines & Policies

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



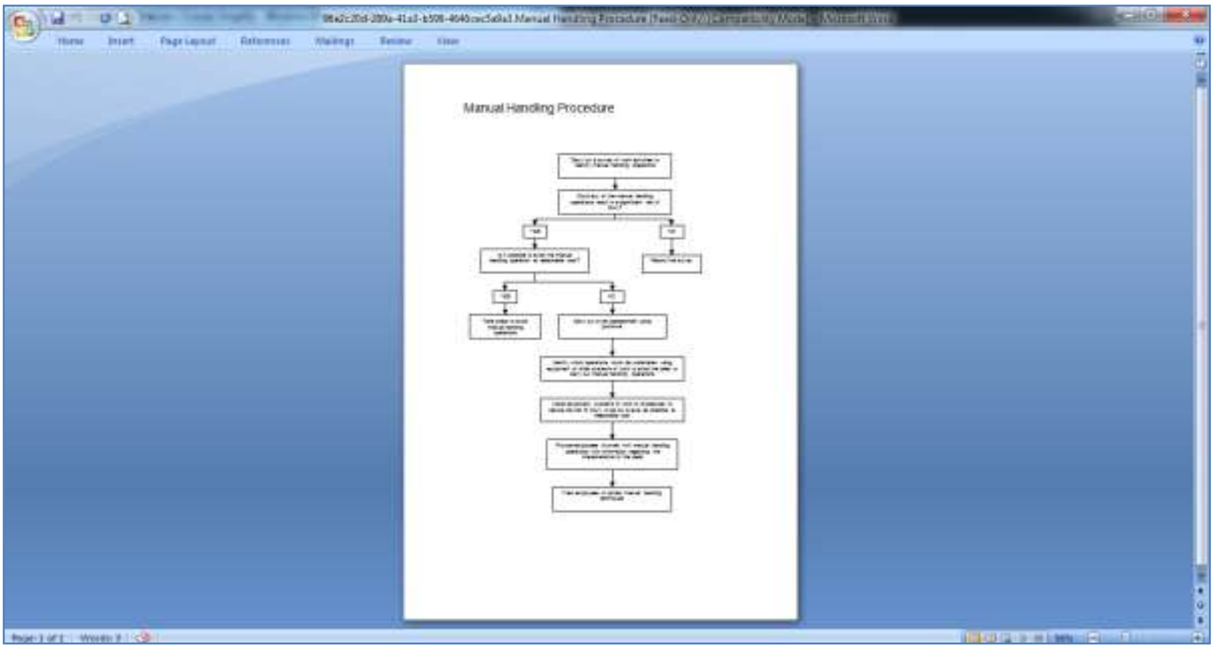
To view a Guideline or Policy document

- 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)



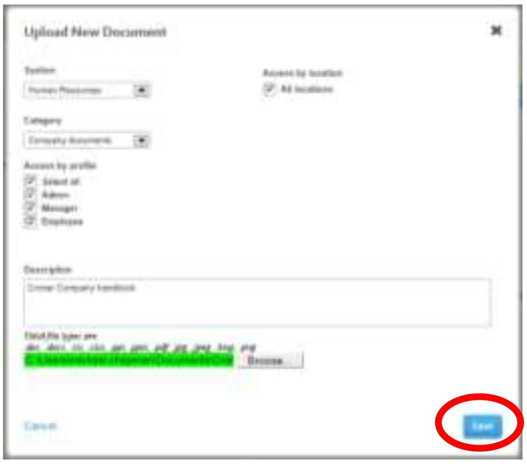
Uploading a New Guideline or Policy

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:

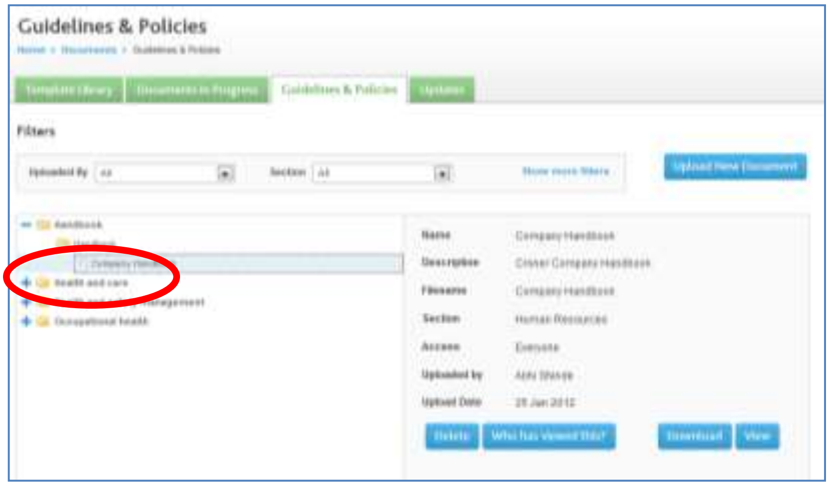
- Administrator
- Manager
- Employee

- 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**



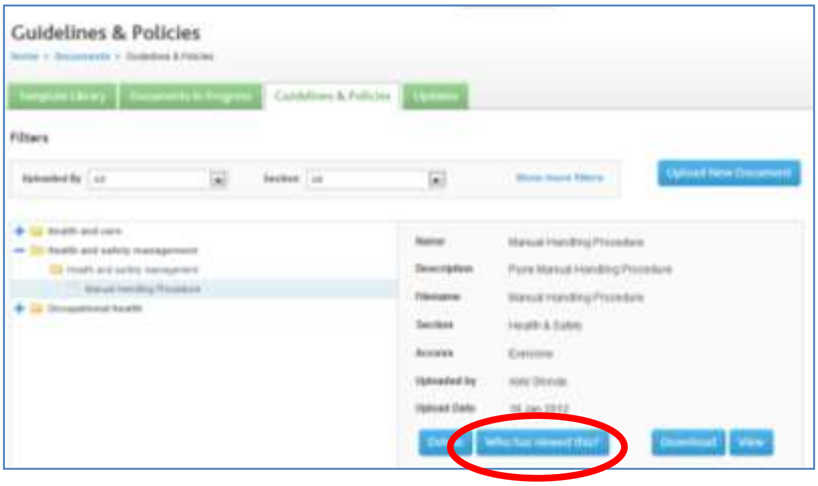
The document is added to the Guidelines & Policies area as in the screen below.



Auditing

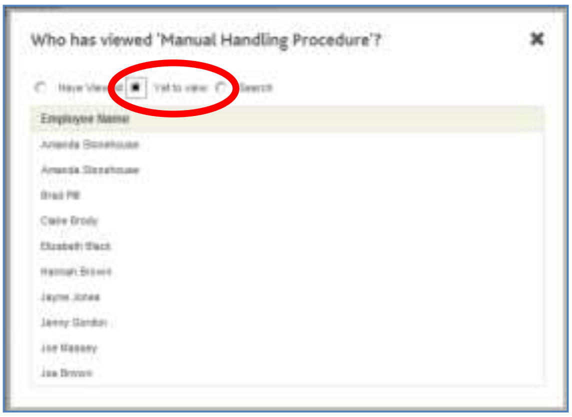
Simplify automatically audits the viewing of company Guidelines & Policies and enables the Administrator and Manager users to monitor who has viewed and not viewed the document. To do this:

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



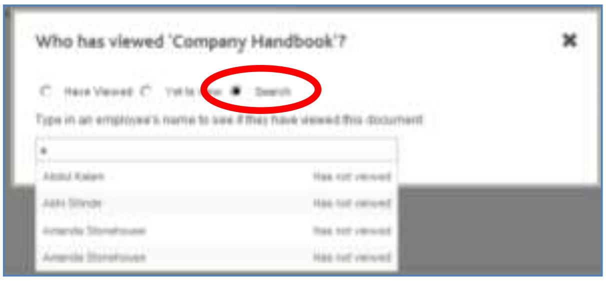
- Administrator and Manager users can choose to see who **Have Viewed** and who are **Yet to view**

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


Who has viewed 'Manual Handling Procedure'?
Yet to view
Search
Employee Name

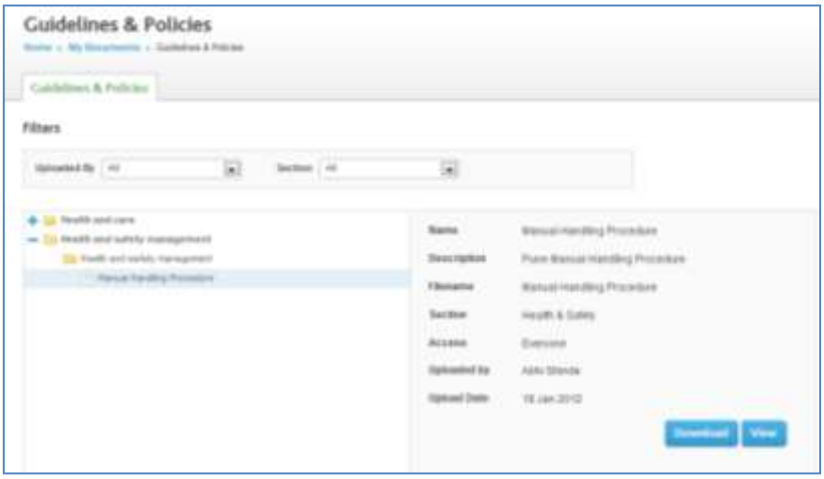
To search for a particular employee to check if he/she has viewed.

- 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

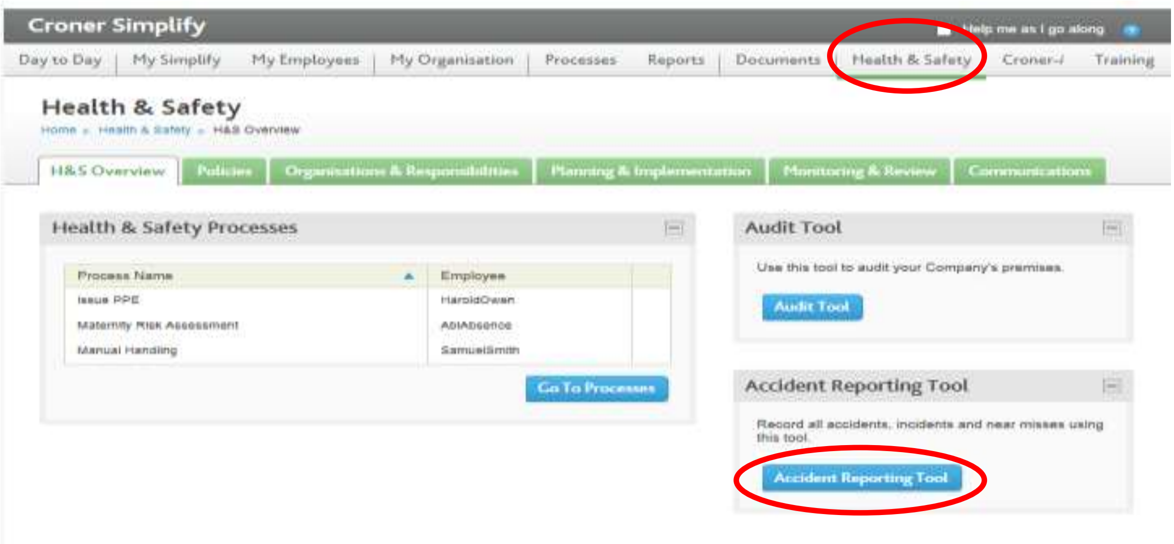
Accident Reporting Tool

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

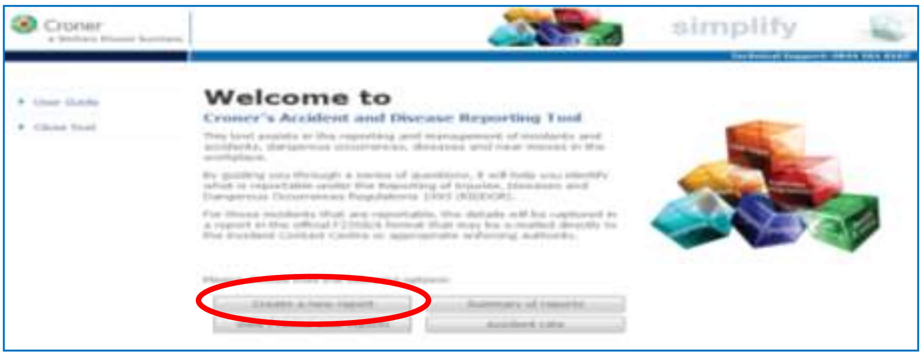
This tab contains useful information and advice on matters relating to health and safety. Some of the information is for subscribed users only however the Accident Reporting tool is available for everyone.

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

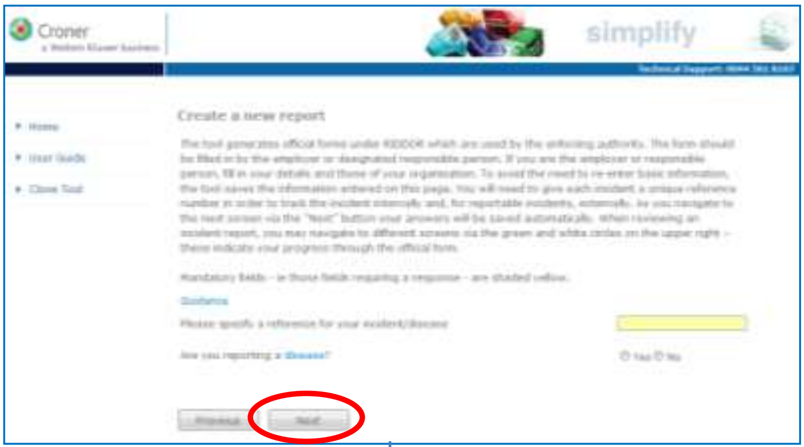


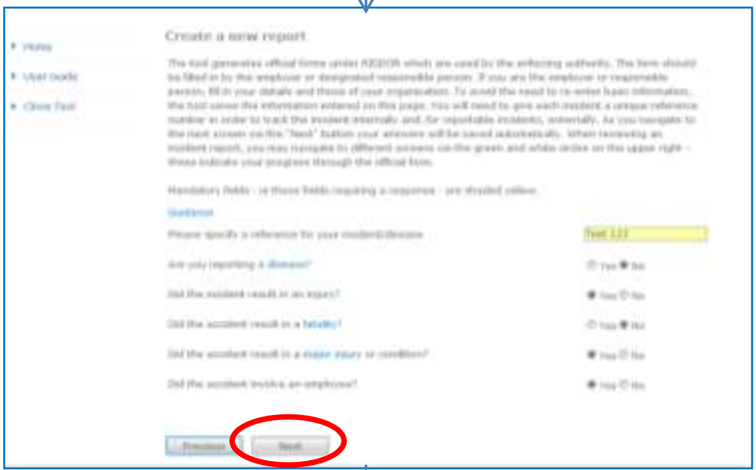
- A separate window opens up
- Click on **Create a new report** button

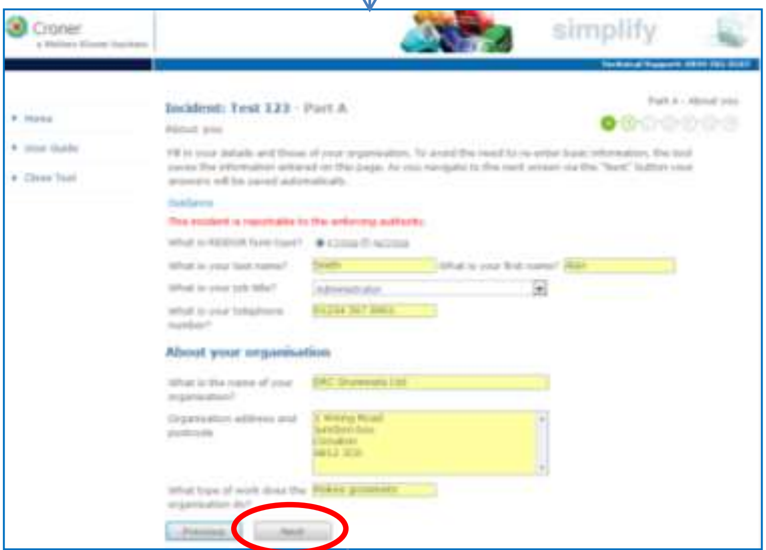


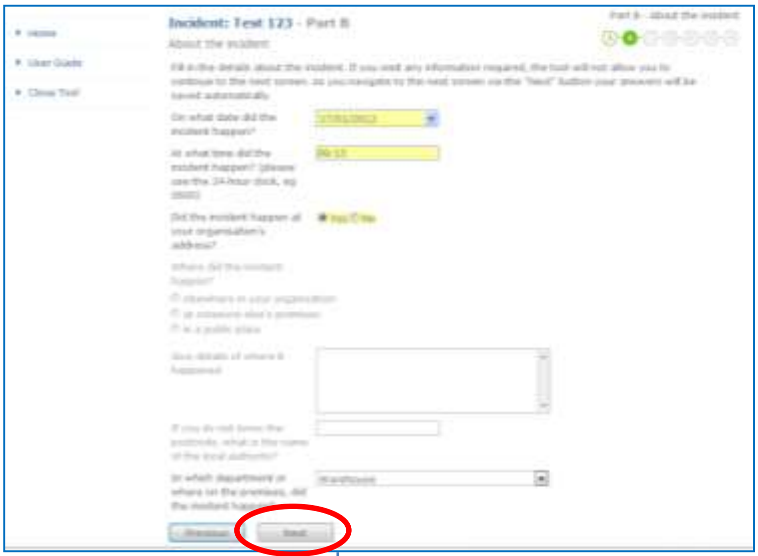
- The report must be completed step by step

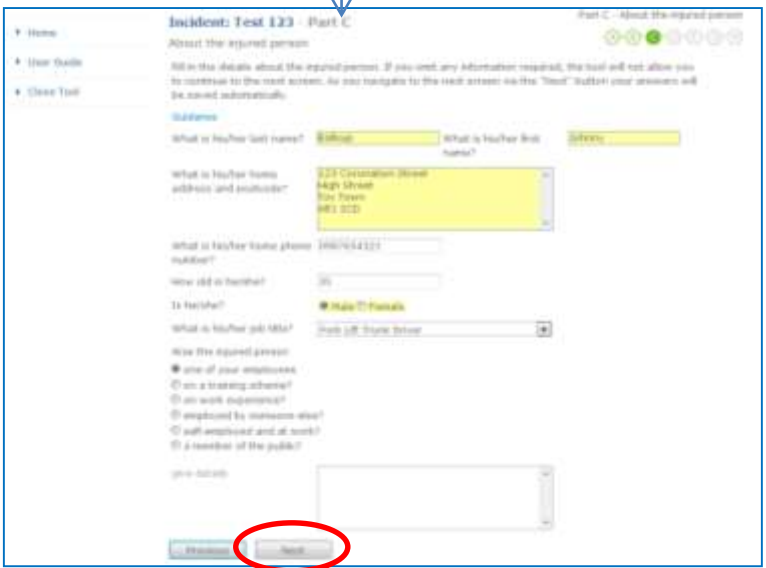
- Complete the appropriate options and click **Next** to proceed to the next screen

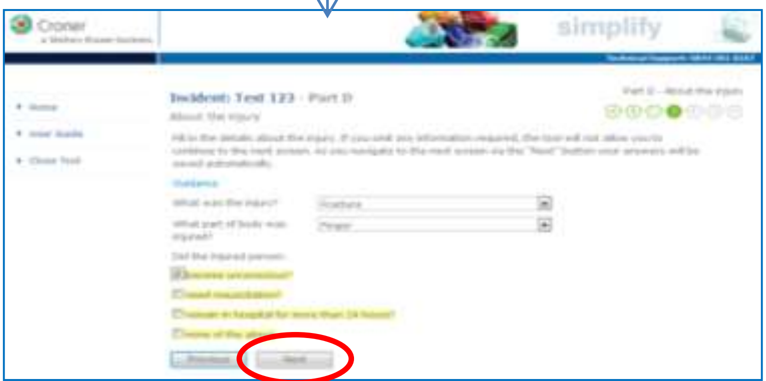


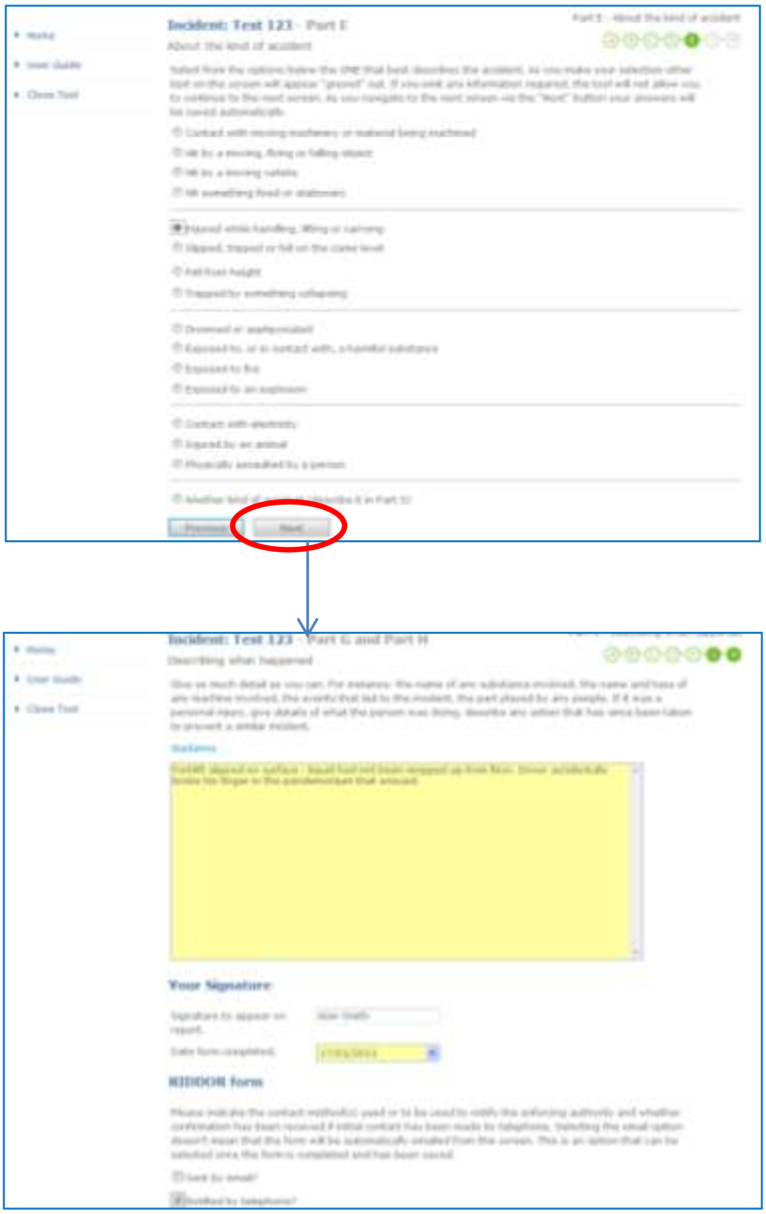





Incident: Test 123 - Part B
About the incident


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 Balloup

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

☑ male ?
☐ female ?

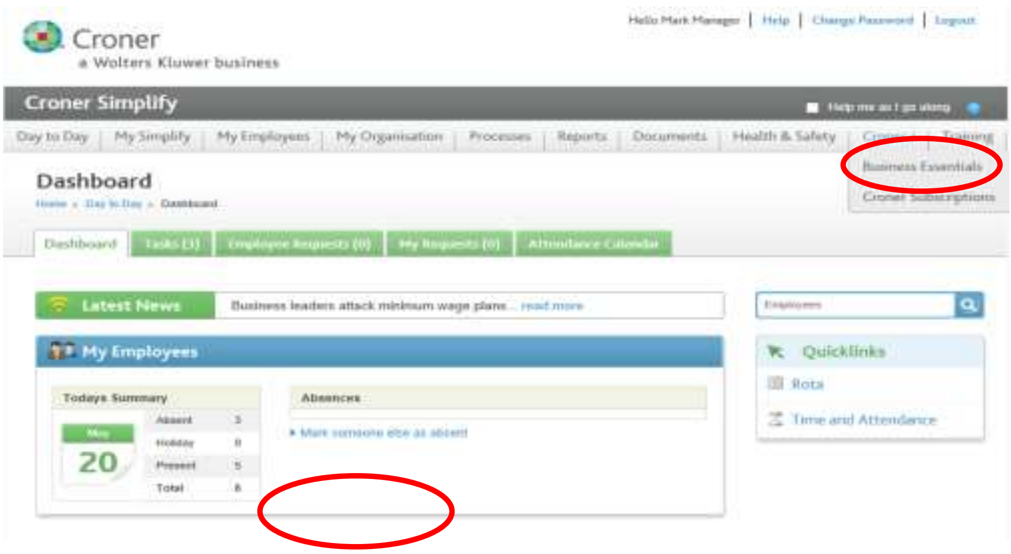
To modify your report click on the 'User Reference' number.

Croner-*i*

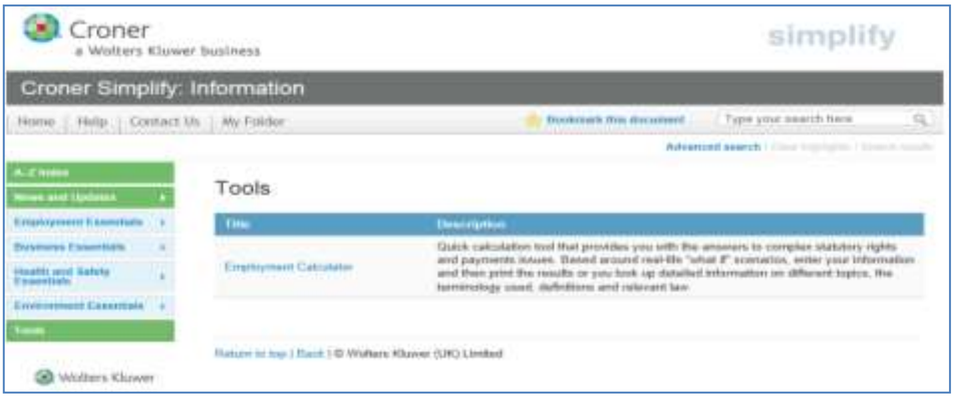
Croner I is an online information tool for businesses. Any Simplify user has to be given permission to see this. There is data on employment, health and safety, environment and tax and legal matters. Business Essentials is updated weekly and contains Quick Facts, In-depth and Step-by-step guides. It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

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

Click **Business Essentials**

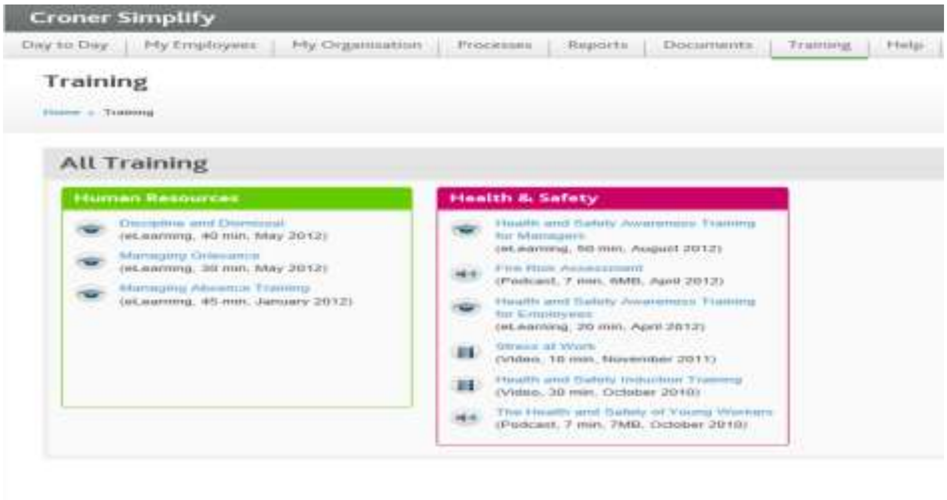


- A separate window appears
- Click on **Tools** in the left hand side bar
- Click on **Employment Calculator**



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.