



Croner Simplify

~ Manager Training Workbook ~

Version 5.0

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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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Training	





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



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Click

Click Logout at the top right hand corner of the screen

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Useful Navigation Tools

a Wolters Kluwer busir	ess	Hello Mark Manager Help Change Password Lo	gout
Croner Simplify		Help me as I go along	•
Day to Day My Simplify My Er	nployees My Organisation Processes Reports	s Documents Health & Safety Croner-i T	raining
Dashboard Home Day to Day & Dashboard Dashboard Tasks (3) Emp Catest News Keel My Employees Todays Summary Absent 3 Holday 0 Present 5 Total 8	Noyee Requests (0) My Requests (0) Attendance ping staff and the bottom line healthy read more Absences Mark someone else as absent	Calen/r Employee Rota Time and Attendance	
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



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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.

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HR · Tax · H&S · Reward

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			E
Search To I	Do List Search documents Type All	Showing 1-5 result	s of 5	
Туре	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	
Decigninary Investigation	Att Assessed	HANALE
Appraisal Titiye	Senal Selle	MANAGE
Probation	Harold Osen	C HUGHLARD

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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.

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List Tasks	Showing 1-7 r	esults of 7					
Due 🔻	Туре	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.

01 Nov 2013 0	Other Right To Work	Passport is due to e	expire		Sue Mooney	Harold Owen Left	Employment	-	
12 Jul 2014	Appraisal	Training FA3 is due	to expire Nev	N	Abi Absence	Abi Absence	Employment	a	
	Appraisai	Training FA3 is due inining FA3 is due to expendence eator Adam Admin signed To Absence eminder eminder Start Date p2/06/2014 Remind me mpletion Comment frite a message:	bire Date 30 Ju On 30 Ju	Created 12013 12013 Reminder Freque Once A Week	Original A: Abi Absenc By Mr Adam Ar	ADI Absence ssignee ce dmin Delete Reminder	Save		

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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 reoccur at the set frequency.

	Tr Cr Hr As	whing FA3 is due to expire wator Adam Admin usigned To p Absence	Date 38 J On 50 J	e Created ul 2013 ul 2013	Origi Abl A By Mr Ad	nal Assignee Isence am Admin		
(-	lemender leminder Start Date 02/06/2014 Ži Remind me	198	Reminder Frequ Onca A West	iency	Delet: Reminder		
		empletion Comment					Save	
	, la				Rea	sign Task Mark as (uit Complete	





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.

Tri	aining FA3 is due to expl	re .					
Cr	wator Adam Admin	Dat 30	e Created ul 2013	Original Abi Abise	Assignee ind		
As Ab	aligned To Absence	0n 50.	ul 2013	By Mr.Adam	Admin		
R	leminder		Received as Francis	1997 -			
Ē	02/06/2014	100	Once A Week	(ency	Delete Beminder		
19	🗄 Remind me						
Co	mpletion Comment					Save	
10	File a restage		/				
1			- (fleastin	n Talk		
					Trends Designed		

Croner

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.

framing rAS is due to expl	re	Ŕ	
Creator	Date Created	Original Assignee	
NIF Adam Admin	30 JUI 2013	Abi Absence	
Assigned To 🖌	On 20 101 2012	By Mr. A dam A dmin	
Samuer Silliun	30 JUI 2013	m Adam Admin	
Remind me			
Completion Comment			Save
Write a message:			



HR · Tax · H&S · Reward

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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.

Write a message:	
	Reassign Task Mark as Complete
A confirmation window is displayed.	Confirmation X You are about to mark the selected task as complete.
By selecting OK the task is marked as complete and will clear the task from the Task List.	Are you sure?

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.

ist Tasks	Showing 1-6 r	esults of 6					
Due 🔻	Туре	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	4	
24 Jul 2013	Appraisal	Training 22 is due to expire	Abi Absence	Harold Owen Left	Employment	4	V
25 Jul 2013	Other Right To Work	• Driving License is due to expire	David Trainer	Harold Owen Left	Employment	\$	V
25 Jul 2013	Benefits	Healthcare benefit is due to expire / needs review	Abi Absence	Kiran Parmar	Employment	4	V
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 Reassig	n Bulk Co	omolete					

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**.

	100	
Reassign Tasks		×
This will change the person to a self service user.	who is assigned to complete these tasks. You will only be abl	is to reasoign tasks
Assign To	Commente	
Samuel Smth (18)	far mispine - pinasia review	
Cannal		Recession

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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.



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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

atus Pending	• Title All	•	Select the H	iquests that you want to accept or
Employee Name	Title .	Previous	New	Authoriser Sele
Samuel Smith	Employee: Samuel Smith	Reason		Marx
		Previous	New	Manager
	Telephone	O 020 12545678	0118 8766565020 12345678	
Samuel Smith	Employee Samuel Smith	Reason		Mark
		Previous	New	Wartager
	Holiday		From: 15/08/2013 To: 16/08/2013 Comments	

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



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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**

Dadilicant Tailo(4) 1	regela you Harquesta (7)	My Raquests (2)	Attendance Calendar			
tatus Pending						
Screen Name	Title	Pre	rvices		New	Select
Employee Holiday Details		Pre	without .		New .	1
	Healing			2	From: 09080013 Te: 09082013 Comments	
Address Details		Pro	nites i		time	r
	Talashona.		alle realizers		The start endered	

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.

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Attendance Calendar

Crone	er rs Klu	wer	ьı	ısir	nes	s																							1		* 1						- 1		500.
roner Sim	olify																																He	lp m	e a	sig	o al	ong	•
to Day My	Simplif	y	м	y Er	mpl	oye	es		My	0	gai	nisa	itio	n		Pro	oce	sse	s	R	epo	rts		Do	um	ent	s	H	leal	th a	8. S	afe	ty	(ro	ner	i	Т	rain
Attendane Home > Day To Da		ale	en nce (ndar				4 (0)		M	De			- 10	0)		A	l		þ		io te	o to	day		Re	⊧dn	est .	Abs	end	e		Red	ues	t H	olid	ау
Filter By location of	r depart	ment]	1	Depa	On	ly si ient	10W	peo	ple	with	ab	sen	ces		 I I)				Ва	nk H	lolld	N ay F	avig Profi	ate I Ies 1	Date to D	e s	4 ay :	19/ Er	05/2 nglar	014 nd a	nd V	Vale	6) 📼	
Employee		1	ay 2	2	4	5	6	7	8	9	10	1	1 1	2 1	12 1	14	15	16	17	12	19	20	21	22	22	24	25	26	27	28	29	30	24	J	une 2	2	4	5	6
Linpioyee		т	F	s	s	м	т	w	т	F	S	s	N	1	τı	w	т	F	s	S	M	т	w	т	F	S	S	M	т	w	т	F	s	s	M	т	w	т	F
Abi Absence						вн																						вн											
Lisa Hunter																																							
Mark Manager						84																						8.4											
Sue Mooney																																							
Harold Owen																																							
Samuel Smith																																							
Jim Smith						01																						0.1											
Jack Wills						вн																						вн											
Ke	у ВН	Toda Non- Bani	ay -wor k Ho	king Ilday	Day /			Jnce	iay onfir	med	но	lida;	y		At	bse nco	nce	med	Abs	senc	e		Sick	ness onfin	med	Sic	ines	5		Fam	ily F onfin	rlen med	diy Far	nily	Frier	ndly			

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



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My Simplify contains the manager's personal record.

ey My Simplify My Employees	My Organization Processes Reports Documents Health & Safety Croner+ Train
erview	
multip - Comme	
riew Taras (1) Hy Details	Attendance Inwellis: Approlotis & Training Treath & Safety Occurrents
k Manager	Length of Service: 17 Years 10 Months 12 Dava
9	

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.

Dereview Tatas(I) H	y Distails Attention		netlig: Approxials & Transing Health & Safety	. Dia
1ark Manager ^{tariager}			Length of Service: 1	7 Years 10 Months 12 Da
×	7 Tasks			13
	Showing the next 1	due.		View Delaits
	Due		10w	3964
	18-Jun 2012		Signed contract	0900
			· Criving Literate	Open
	18./ee 2012			
	18.Jan 2012 18.Jan 2012		· Orkerp License	Open
	18 Jun 2012 18 Jun 2012 18 Jun 2014		Crising License Training Fire Saliding to due to expres	Open.

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Ľ	15 Atte	ndance					5	R Quicklinks
	Holiday				Sick Leave			📰 Rota
	8.99 of 25 DC	days uned			0.00 day taken in last 12 month	6		Time and Attendance
	E-mail					-	-	Croner Reward
	Request	a Hudshay				View	Details	O Virtual Clock
	😵 Upci	oming C	hanges	k –			- H	Clock in ar Clock But
	Neith	etgen pers	éra .					If you forget to clock in or out, please
								100 000 80 00 000 0 10 0 800

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 Simp	lify					Ū	Help me as I go a	ilong 📀
Day to Day My S	implify My Employe	My Organisation	Processes	Reports	Documents	Training		
Employee: Home > My Employ	s Overview yees ⊳ Overview							
Filter						Action	Select all C	lear all
Employee Name be	gins with	Show more filters	Showi	ing 1-8 resul	Its of 8	Select act	ion	•
Employee 🔺 ID	Employee Name	Dej	partment			Location		
1	Samuel Smith	Sale	25			Head Office		
10	Harold Christopher Owen	Sale	25			Head Office		
11	Jack Wills	Sak	25			Head Office		
123	Gemma Louise Copp	Adn	ninistration			Head Office		
13	Sue Mooney	Sale	15			Head Office		
2	Lisa Hunter	Sak	25			Head Office		
59	Jim Smith	Sale	es and Marketing			Nuffield Roa	d	
								_

Action Select all I Clear all





Employee Overview

• To select a single employee search by using the Filter.

roner S	implify					E He	p me as 1 ge al	ióng 🧃
to Day	My Simplify My Employees My	Organisation	Processes	Reports	Documents	Health & Safety	Croner-i	Train
ritter						Action	Select all	Ciner a
Filler Employee Na	me bogins with . Show	more filters	Show	ng 1-7 results	of 7	Action Select action	Select all	Chear a
Employee Nar	ID A comployee name	more filters Des	Show	ng 1-7 results	of 7	Action Select action	Select all	Char a
Employee Na	ID A Employee have Samuel Smith	more tilters Des Sak	Show partment	ng 1-7 results	of 7	Action Select action	Select all	
Employee National Employee Nat	ID A cruptoyee have Samuel Smith Harold Christopher Overn	more titters Dep Sala Sala	Show partment m	ng 1-7 results	of 7	Action Select action Location Head Office Head Office	Select all	
Employee Na Employee 1 10 11	ID A chiployes have Samad Smith Harold Childopher Overn Jack Wills	more filters Des Sala Sala	Show partment ee es	ing 1-7 results	of 7	Action Select action Location Head Office Head Office Head Office	Select all	
Employee Nat Employee Nat 1 10 11	ID A Complexity of the set of the	more filters Des Sala Sala Sala Sala	Show partment es es es	ng 1-7 results	of 7	Action Select action Location Head Office Head Office Head Office Head Office	Select all	

- 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.

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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

oner Simp	lify				🔲 Hel	lp me as I go al	iong 👩
to Day My S	Simplify My Employees	My Organisation	Processes Reports	Documents	Health & Safety	Croner-i	Training
mployee	s Overview						
Filter					Action	Select all	Clear all
mployee Name beg	ins with	Show more filters	Showing 1-7 results	af 7	Select action		~
Employee ID 👗	Employee Name	De	partment		Location		
Employee ID 🔺	Employee Name Samuel Smith	De	partment		Location Head Office		
Employee ID 🔺 1	Employee Name Samuel Smith Harold Christopher Owen	De Sai	partment es		Location Head Office Head Office		
Employee ID A 1 10 11	Employee Name Samuel Smith Harold Christopher Owen Jack Wills	De Sai Sai	partment es es		Location Head Office Head Office		N N

Employees Overview ait all I Class all O ritter Antion Showing 1-8 results of 8 Tilter s Book a holiday Select aution Start a process Eospinyss iD Employee Here Departme Lonation Head Office 1 Samuel Smith Sales 10 Harold Christing Gales Head Office 2 Jack Wills Delet Head Office Haad Office 128 Germa Linnie Gabi Admini 121





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

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Overview

Dverview 12	ks (1) Details	Attendance Ben	atta	Appraisats & Training	Health & Safety	Documents	
amuel Sm	ith				Length of Serv	ice: 2 Years 4 M	1onths 19 Da
0		7 Tasks					C
		Showing the next 1 due.					View Details
		Due	n	560			Status
		13 Dec 2013		Training first aid is due to ex-	pine		Open
Attendar	ice .				*	Quicklinks	
Holiday	104	Sick Lon	WW			Rota	
		3.00 days				Croner Reward	
Book a Helida		Recor	d ain Ab	View Deta	HS.		

- 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

Huhiday	Sack Leave
1 00 of 25 00 days used	1.32 sky taken in last 12 months
Bank a Hallibre	Record an Alasmur View Details

- 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

Add Holiday		×
Bart Date	End Date	
• Hay C an C an	· All Gay C and C gas	
Dysaltion Days		
Ruben		
Cancel		See

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

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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

Add Absence				×
Absence Category	Absence Resear			
Distance Sciences	Please salect.	-		
🗂 Include In Absence Scheme	0			
Start Oate	End Date	Duration		
138		Dжук		
R AK GAY C AM C PM	TALIDAY C AM C	M This absence is work re	etefed 😡	_
Confirm Return to Work Date	O COUNTRAK	Back to Work Interview Required	O CHARTER	
Medical Certificate Required	O (COUNTAIN)	Medical Certificate Expiry	C (CMIRETIER)	
Self Certificate Required	O Create Task	Self Certificate Expiry	C Create Test	
Notes				

Select the appropriate category.

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



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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	② Create Task	Back to Work Interview Required	Create Task	
Medical Certificate Required	② Create Task	Medical Certificate Expiry	Create Task	
Self Certificate Required	Create Task	Self Certificate Expiry	Create Task	
Notes				
				.::
Cancel				Save

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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.

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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]

0-14 mil	peop	-	10			-	10.13	Fail Fail	1000						N Ny I	***	ate 1	Dan to D
	10		-	-	-	-					20	24	22	13	24	25	25	27
1 5 5		1	W.	т	*		ъ	м	T.	w	T	F.			м	1	w	τ

Select Update Task

R

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.

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Tasks	mplayees »	Samuel Smith						
Overview	Tasks (1) Details	Attendance	Benefits	Appraisals & Training	Health & Safety	Documents	
ilters								
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• 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

Over-ma Taski (1)	Outsite Amazdaman	Boolin Aurona Alineau	Hamilton Safety Dawn	-
amuel Smith		8	Contact Details	
Sandadoon No Romana ao San	Geneties Notes Responses CE (D) 1 Martine Native Martine Cosponses (D) 1	Seek of Rock 2001-000 In Xeenaal According Contract Name Contract Name Contract Name Contract Name Contract Name Contract Name Contract Name	Ernel ekkene san professor co.a Addene 12 Park Russi Aderes Santes With 01.0	Talaphana nambura Mate Stat Laterate Materia Materia Materia Materia
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Angelginet Calegoly 1 Notematic Tales Engineers Tales	Asserts Epis 1890-189 Privatija Rake	inar vetasi i totti Wannya Pattern Cutasit	Right to Work Deta	da 🗧

- 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

Croner Simplify

January 17

• 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.

Croner HR·Tax·H&S·Reward

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Attendance

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

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			i.		Ban	k Ho	olida	v																																		

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Benefits

	ner ters Kluwe	r business				Hello Mark Manaj	ger Help Chang	e Password	Logout
Croner Sir	nplify						Hel	p me as I go al	long 👩
Day to Day	1y Simplify	My Employees	My Organisation	Processes	Reports	Documents	Health & Safety	Croner-i	Training
Benefits	ployees 🕨 Sam	uel Smith							
Overview	Tasks (1)	Details Atter	idance Benefits	Appraisals &	Training	Health & Safet	y Documents		
Samuel	Smith								
Standard	Benefits								-
✓ Healt	hcare						te Ma	nage Docume	nt (O)
Scheme Nur	mber	233455		Healthc	are Provider	BUPA			
Cost		£4556.00		Effectiv	e from	04/01/20)12		
No. Depende	ents Covered	3		Level of	l cover	Whole F	amily		
				Effectiv	e until	06/01/20)14		
Death	in Service						te Ma	nage Documer	nt (0)
Comp	any Loan						te Ma	nage Docume	nt (0)
Childe	care						te Ma	nage Documer	nt (0)
Pensie	on						te Ma	nage Documer	nt (0)
Comp	any Vehicle						🗈 Ma	nage Documer	nt (0)
Other Ber	nefits							1	0 =

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

Test	c(1) Deturb	Attendence		Appentials & Training	Heatth & Safety	Documenta		
amuel Smit	th							
oppraisals								
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	19 al anticipa					Start App	and and the	rocess
Goats	Due Date	Desired Outor	irres 1	Notes		Completed	12	Actions
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raining								
Training Course	Description			Date Completed	Outcome	Expery Da		Actions
Training Training Course Code Lipam	Description			Date Completed	Outcome	Expire Oa	-	Actions
raining Training Gourse Code 1 pain 1 pain	Description pass pass			Data Completed be aim 2014 be aim 2014	Outcome pase	Expiry Da ta Oil 301 ta Oil 301	10 4	Actions
Training Training Course Code 1 pam 1 pam 1 pam	Description pass pass pass			Date Completed De Jan 2014 De Jan 2014 De Jan 2014	Outcome pase pase pase	Expiry Da (10 Oil 301 (10 Oil 301 (10 Oil 301	100 4 4	Actions 2 0 2 0
raining Training Course Coole 1 pam 1 pam 1 pam 1 pam	Description pass pass pass			Date Completed be Jan 2014 be dan 2014 be dan 2014 te dan 2014 te beu 2013	Outcome pass pass pass pass	Expiry De 18 Out 301 18 Out 301 18 Out 301 23 One 30	100 4 4 112	Actions 2 0 2 0 2 0 2 0
raining Training Gourse Gode Laath Laath Laath Laath Training Pire Selety	Description pase pase pase pase competent			Date Completed be Jan 2014 be dan 2014 be dan 2014 be dan 2014 be beu 2013 be fren 2012	Outcome pass pass pass pass Pass	Expiry De 18 Oil 201 18 Oil 201 18 Oil 201 23 Dec 20 06 Jan 201	100 14 13 14	Actions
raining Training Course Code (pam (pam (pam net all) Fire Salety Add Training	Description pass pass pass pass competent			Date Completed Be Jan 2014 Be Jan 2014 Be Jan 2014 Be Jan 2014 St Dee 2013 Be free 2012	Outcome pase pase pase pase pase Pase	Ecolity Da 18 Oct 201 18 Oct 201 18 Oct 201 23 De6 201 06 Jan 201	100 4 4 4 4 4	Actions 2 0 2 0 2 0 2 0 2 0
raining Training Course Code Laam Laam Rot an Pice Sahely Add Training	Овестроно наке раке раке сотрененt			Date Completed te Jan 2014 te Jan 2014 te Jan 2014 te Jan 2014 te bes 2013 c9 Fen 2012	Оцеотти рана рана рана рана Сито	Expiry Dx 48 out 201 18 out 201 48 out 201 48 out 201 68 Jan 201	10 4 4 10 4	Actions 2 0 2 0 2 0 2 0 2 0 2 0
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Appraisal, training and qualification information may be recorded within this section.

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

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						To Be Propared By
						Start Appraisal Process
Goals	Due Date	Desired Os	etcome	Notiva		Companied 🛛 Actions
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Process Summ	ary					steps: the
Process Name Approximal Steps Date Harbed 20 Aug 2013	Process Type Approxision (Deps Sourced Dy Adam Roman	Concerning Employee Mark Manager	Rotes		jil Upidate	information will be saved to the employee record.
Process Detai	s					
					🗄 expand all 🛛 🖂 collapse all	
			liste due	Completed	Completed by	
	Email		Aug 21 2013		(#)	
1 🖂						
1 1	Desc.		Aug 21 2013		.96	
1 M 2 / 3 /	Desc. Desc.		Aug 21 2013 Aug 21 2013		æ	

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			*
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totes			
Late Longitudes	Danted Dukama	Expry line	
100			100
Add Look			

Qualifications - functionality as above.

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Health and Safety

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

Health & Safety Home > My Employees > Sam	uel Smith			
Overview Tasks (1)	Details Attendance	Benefits Appraisals & Tra	ining Health & Safety Documents	

Samue	l Smith
-------	---------

PPE				0 =
Item 1				(a) Manage Document (0)
Equipment	Date Issued	Date Expires		Needs to be handed back
shoes	16/02/2012	15/02/2013	Create Task	Has been handed back
				Date Handed Back
				Please Select
Notes				
				۹
				Add New PPE Item
Responsibilities				2 🖃
				Add New Responsibility





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

Equipment	Date issued		Date Expires	
Hard Hat	21/08/2913	121	29/08/2016	125
🖉 fileeds to be handed back	🔄 Has been han	ded back	Date Handed Back	
				88
Add Task				

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 Inforn	nation si Snith						
Overview Tasks (1)	Details Altr	indance	Benefits	Approfisals & Training	Health & Salety	Documents	
Samuel Smith							
Mail Merged Docume	ents						Ξ
						1	Create Document
Name	Date Created	Date Last Edited	Creator	Category	Sub Category	Actions	Issued
invite to investigation Meeting	18 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.

aminary wave a	enelles Atta	ndance P	witemance	Ranagonisent	Health 6.34	lety Em	no yne Nara	genent	Documents
amuel Smith									
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								Upload I	Normanne 1

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

1	Armine .	Performant of			1
	Upload Docu	ment		×	
	Category				
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	Cancel			tiplicad	
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- Click the Browse button and select the file to upload
- Click Open



• Click Upload

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My Organisation

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

(Simplify							
ry to Day	My Simplify	My Employees	My Organisation	Processes	Reports	Documents	Health & Safety	Croner-/ Train
My Or Harris + My	ganisatio	n						
My Orga	misation							
Chart ty	pe Dy Compar Oby H&S Re	ny Structure esponsibility	Find Someone					
-	1000	~						
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•	•	© ©	Devid Dimen Marine Jack V	Trainer- e Wanoget bo		Kevin Newto Manager	n	Tim Clark Administrator

• 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.







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





No. (Sectorem)	•				
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Thinks FT-Building	Despire Develop Law			B	
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• The following dialog box will appear.

Start Process	3
🗖 This process relates to a	n emploted
1.1.0.0+0	
Coor Process Table	
lina.	
Provincia Manaz-	
	arriers.
1,43.04	anac

- 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'
 - \circ $\;$ 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

Start Process	×
🖗 This process relates to an a	muloyee
Employee	
Abi Absente (8)	
llaar Frozana Table	
Diszlplinary Investigation	•
Process Name	
Dracphnay hrvorigature	
Cancel	Start

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

Process Sumn	nary			6
Process Name	Process Type	Concerning Employee	Roben	
Disciplinary Investigation	Disctalinary Investigation	Abi Absence		
Date Marked	Started By			
06 Jul 2012	Adam Admin			
				Update

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Process Deta	lls				.8
				di report all	li colone al
		Units share	Completed	Compl	atland Bay
17	Desc.	au 09 2012			0
2	Process	Au 19 2012			8
3 🔽	DiaryEntry	JAI 09 2013			(8)
4	Merge	Ad 09 2012			18
5 7	Desc.	Jul 19 2012			10
6	Document	Jul 09 2012			8
7 💽	DiaryEntry	Ad 10 2012			.90
8 1	Process	Ad 09 2012			96

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.



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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

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n hie drawnlet www		
State of each of the section of the		

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.

2 🔔	Process	A419.2012 -
Depending of Rat	the most three wayle a cost is suspend	(The engineer which pay carrying the invertigation layer) for pay discover laws being
Provide to M	*	
		Annual Province Steps

- 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.

Process Det/	sita				
			11.00		
		Date due	Company	Constructor	
1.7	Desc.	ar 19 202	38 Au 2012 at 10:00AH	Adam Admin	181
2 🔟	Process	A689-2013			10
3 🗷	DiaryEntry	AK 88 202			11
4	Merge	A410-30.0			Ŧ
5 📝	Desc.	2419.215	00.3ac2012 w 1030AM	Adam Admin	-
6	Document	Ar#2012			11
1 2	DiaryEntry	Ad 89 2012			18
8 🔟	Process	.44 89 2012			38

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Step 3 is a diary step.

Remain spitters		Thinks	
You must investigate the situation process and to dolay. Speak to you study to You can use the situation only	an sent as possible and without strained Team to micros the next in schedule the cal		
TRA-			
Providention			
Anisymal to			
thates (M)			
Task			
Due Date	Annigo Ite		
100			
Reminder			
Reneaser Start Date	Hernieder Frequency	Todaylor Residentiat	
To be served bits			

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.

Contract (Contract					
New Josepherson,				1	National Service
Corrent Processes				-	g 1.52 weaths of 20
the sea balance	Respect To	100.00	the Date Start		1000
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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

roner Simpl	ify		Advice Lir
y to Day My Sin	oplify My Employ	ees My Organisation Pr	ocesses Reports Documents Health & Safety Croner-/ Training
Disciplinary	/ Investigation	on "	Mark process as Comple (Delete Process
Process Summ	nary		
Process Summ	nary Process Type	Concerning Employee	Notes
Process Summ Process Name Disciplinary Investigation	Process Type Disciplinary Investigation	Concerning Employee Abi Absence	Notes

Viewing Processes

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

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Terr	Selpe:	De.	 Anipted by 	Related to originate
Task	· Conjugate approximity are deer	11.00-2112	Adam Inform-	and the second se
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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)

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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**.





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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

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

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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

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All Reports

The All Reports section shows all the standard reports in Simplify

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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

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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

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• Click on the print icon to print the report

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Reporting

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

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• 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.



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• To run further reports click on the Back to Reports button

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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.

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

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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.



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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

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

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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)

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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

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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.

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

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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.

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• 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

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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



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SELF CERTIFICATION FORM	Marie Paule Samenet2	05 Pep 2014	Catherine Lastrans2	Advances + Shith Former	20	Sur. 10

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 Gui	delines & Polici	es			
Filter 🕑 Ci	reator Please Select	. 💌 Ca	tegory Please Sele	ct		
Document Name	Relates to	Date Created	Created By	Category	Actions	Issued
(Deduct01) Agreement to Deduct OverpaymentNew	Samuel Smith	15 Dec 2014	Marilyn Lastname8	Deductions > Deduction from pay	20	(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

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• 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

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Access by profile Select all Admin Manager Employee			
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• Click Save



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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.

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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

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• Click View

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

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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

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- 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

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

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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

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

Have Viewed C Yet to view C	Search	
Employee Name	Date Viewed	
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Chiefs Jadhav	18 January 2012	
Adudul Kalem	25 January 2012	
Employ Newtons Law	25 January 2012	

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



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Who has viewed 'Manual Handling Procedure'?	×
C Have the of T	
Employee Name	
Juneida Bonehouse	
Arranda Stenatouse	
drui PB	
Calle Brody	
Elizabeth Deck	
Mantals Brand	
Jayne Jones	
Janny Handury	
ine Wanny	
an Brook	





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

Who has viewed 'Compar	ny Handbook'7	
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Type in an employee's name to see	of they have viewed this document	
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 Anna Kaiyo Akhi Shinan Anna Kaiyo 	Han tot verved Han tot verved Tean tot verved	

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.

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

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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



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• 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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HR · Tax · H&S · Reward

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- 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





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

Filling in this form. This form must be filled in by the employer or other	r responsible person
Part A	Part C
About you	About the injured person
What is your fait mene?	If you are reporting a dangerous occurrence, go is Part F.
	If more than one person was injuried in the same incident, please attach the details asked for in Part C and Part D.
What is your job title?	for each injured person.
Adminute	1 What is their full name?
What is your lelephone mamber?	Junny Ballia
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About your organisation	123 Consultan Street
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AB12 5CD	4 How old are they?
What type of work does the organisation do?	36
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Part B	Nemaké 7



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

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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, Indepth 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

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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.

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