

CUSTODIAN LIFE ASSURANCE LIMITED

# TURNQUEST HRMS PHASE 1

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## RECRUITMENT, PAYROLL

CUSTODIAN HR DEPARTMENT

11/3/2017

TURNQUEST HRMS PHASE 1 AT CUSTODIAN FOCUSES ON THE RECRUITMENT AND PAYROLL MODULES. NEW ENTRANTS SHOULD BE SEEMLESSLY CAPTURED INTO THE APPLICATION, ASSIGNED GRADES WITH CORRESPONDING ALLOWANCES, AND LINKED TO SPECIFIED PAYROLL GROUPS AS PER THE ORGANIZATION STRCUTURE. PAYROLL PROCESSING FOR ALL PERSONNEL WILL BE DONE FROM THE APPLICATION ON A MONTHLY BASIS, FOR REGULAR PAYROLL, AND PERIODICALLY FOR OFF-PAYROLL ALLOWANCES.

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## INTRODUCTION

The Implementation of TurnQuest HRMS, Phase 1, at Custodian focuses on Recruitment and Payroll:

- The recruitment process will entail capturing vacancy and applicant details, the interview and short-listing process, as well as employment and on-boarding. As a pre-requisite to this, posts and grades must be created. Such Grades will have specific allowances (with their amounts) tagged to them. “Posts” in the context of TurnQuest HRMS refers to Job Titles/Designations. A post is usually created under a specified grade/level, so that the required allowances will automatically be matched to the person employed to the post.
- The Payroll process starts at “Pre-Processing”, where the system does basic checks, such as whether the payroll run date, pay slip date and pay date have been defined for the payroll run. The next step is “Processing”, where the system cross checks personnel payment details, confirming that payment (bank) details have been defined for all personnel. The final step is “Authorization”, where postings are done to the Financial Management System. There is an interface for this, where the accounting logic is defined in the application.

What follows next is a more detailed guide on the above main processes. Other modules will be covered in the next phase of the project’s implementation.

## RECRUITMENT - SETUPS

### Definition of Terms

**Post:** A post refers to a job title/designation. Each post will have a unique code, for easy identification and management.

**Post Grade:** This refers to “Grade”. For each grade, allowances will be mapped, so that personnel assigned to that grade automatically have such allowances populated to them, with no need to further alter or manually add these, except in cases where such modification is necessary.

**Pay Elements:** This is the general term used to refer to allowances (earnings) and deductions. These will be mapped to grades, and consequently to personnel employed at those grades/levels.

**Note:** Post Levels should ordinarily refer to functional positions/levels in a company, such as Manager, Head of Department, Controller, etc. Post Grades would then be manager grades, HOD Grades, Controller Grades, etc. whose differentiating factors would be the pay and corresponding responsibilities (job descriptions). However, for Custodian, we will have “post level” being synonymous to “post grade”, to achieve ease in managing associated allowances, particularly on Grade Pay Elements setup.

### Grade Salary Scales Definition

This will be used to define the different amounts of BASIC PAY (BASIC ALLOWANCE) that can be payable to new joiners at the point of entry, or when an employee is being transferred from one grade/position to a new one. Here, we define the minimum BP, Mid amount BP, the Maximum, and Customized BP (whose range is between minimum and maximum, and is manually keyed in at the point of employing new joiners)

Access Grades Setup screen as follows:

LOG IN >> CORE SETUP >> GRADES SETUP >> POST LEVEL AND GRADE DETAILS

HOME

CORE SETUP ✓

Types
Qualifications Setup
Company Setup
Grades Setup ✓
Medical Setups
Pay Elements Setups
Payroll Setup
Calendar
Memos
System Alerts
Accounts
Administration

PERSONNEL SYSTEM

PAYROLL

>>

Establishment Post SetUp

Post Levels & Grade Details ✓
Pay Element Grade Details
Post Definitions

Post Levels
New
Delete
Output Format
CONTRACT STAFF
CONTROLLER
DEPUTY GENERAL MANAGER
DEPUTY MANAGER
EXECUTIVE
EXECUTIVE DIRECTOR
GENERAL MANAGER
JUNIOR LEVEL 1
JUNIOR LEVEL 2
JUNIOR LEVEL 3
JUNIOR LEVEL 4
JUNIOR LEVEL 5
MANAGER
MANAGING DIRECTOR
SENIOR EXECUTIVE ✓
SENIOR MANAGER

Post Grades
\* Code SE
\* Description SENIOR EXECUTIVE
\* Ranking 11
\* Minimum Amount 679,183.36
\* Maximum Amount 726,938.27
\* Currency NAIRA
\* Status ACTIVE
\* WEF 01-Jan-2016
Save

Grades Differential
Salary Scales ✓
New
Edit
Delete
Populate Salary Scale
View
Detach

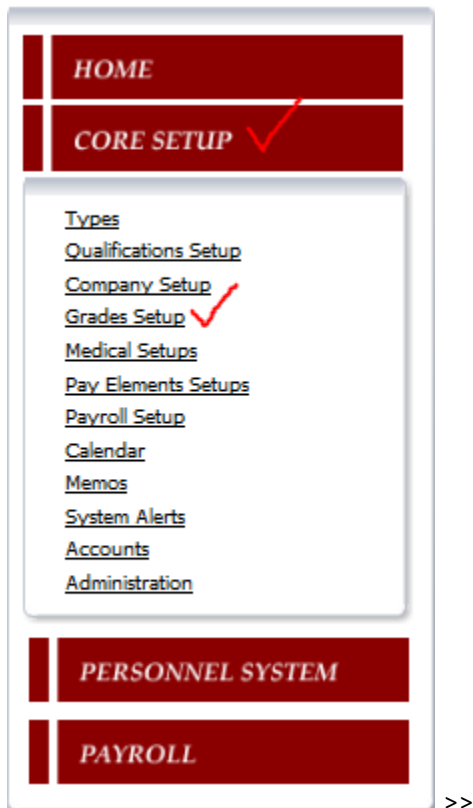
Code	Description	Ranking	Minimum Amount	Mid Amount	Maximum Amount	WEF	Status
SE CUSTOM	SENIOR EXECUTIVE CUSTOMIZED	1	679,183.36	.00	726,938.27	01-Jan-2016	ACTIVE
SE MAX	SENIOR EXECUTIVE MAX	3	726,938.27	.00	726,938.27	01-Jan-2016	ACTIVE
SE MID	SENIOR EXECUTIVE MID	2	703,060.82	.00	703,060.82	01-Jan-2016	ACTIVE
SE MIN	SENIOR EXECUTIVE MIN	1	679,183.36	.00	679,183.36	01-Jan-2016	ACTIVE

## Grade Pay Elements Definition

This area allows you to define the allowances payable to an employee at the given grade, with the respective amounts payable to them at that level.

Access:

LOG IN >> CORE SETUP >> GRADES SETUP >> PAY ELEMENT GRADE DETAILS



Establishment Post SetUp

Post Levels & Grade Details   Pay Element Grade Details   Post Definitions

Post Levels

ASSISTANT EXECUTIVE  
ASSISTANT GENERAL MANAGER  
ASSISTANT MANAGER  
CHIEF ACTUARY  
CONTRACT STAFF  
CONTROLLER  
DEPUTY GENERAL MANAGER  
DEPUTY MANAGER  
EXECUTIVE  
EXECUTIVE DIRECTOR  
GENERAL MANAGER  
JUNIOR LEVEL 1  
JUNIOR LEVEL 2  
JUNIOR LEVEL 3  
JUNIOR LEVEL 4  
JUNIOR LEVEL 5  
MANAGER

Pay Element Grades

New Edit Delete

View Detach

Code	Description	Ranking	Amount	WEF Date	Currency	Pay Element	Status
PERF_BONUS	Maximum Performance Bonus	1	496,208.67	01-Jan-2013	NAIRA	Performance Bonus	ACTIVE
13TH	13th month	1	112,500.39	01-Jan-2013	NAIRA	13th Month	ACTIVE
MEDICAL	Medical Allowance	1	182,502.99	01-Jan-2013	NAIRA	Medical Allowance	ACTIVE
LEAVE	Leave Allowance	1	42,730.21	01-Jan-2013	NAIRA	Leave Allowance	ACTIVE
LUNCH	Lunch Allowance	1	137,687.08	01-Jan-2013	NAIRA	Lunch Allowance	ACTIVE
DRESSING	Dressing Allowance	1	82,611.60	01-Jan-2013	NAIRA	Dressing Allowance	ACTIVE
UTILITY	Utility Allowance	1	95,463.23	01-Jan-2013	NAIRA	Utility Allowance	ACTIVE
FURNITURE	Furniture Allowance	1	124,836.53	01-Jan-2013	NAIRA	Furniture Allowance	ACTIVE
TELEPHONE	Telephone Allowance	1	38,700.00	01-Jan-2013	NAIRA	Telephone Allowance	ACTIVE
PENSION	Pension contribution	1	104,709.33	01-Jan-2013	NAIRA	Pension Contribution	ACTIVE
TRANSPORT	Transport Allowance	1	252,625.00	01-Jan-2013	NAIRA	Transport Allowance	ACTIVE
HOUSING	Housing Allowance	1	367,166.25	01-Jan-2013	NAIRA	Housing Allowance	ACTIVE

Once defined, the system will automatically allocate the amounts defined here (in the “AMOUNT” field) to any personnel who join Custodian at the defined Grade. This assignment of pay elements and their amounts to joiners (or transferees from one position/ grade to another) is not cast on stone. It is editable, and can be modified from the link “Personnel Pay Elements” shown hereunder:

HOME

CORE SETUP ✓

Types

[Qualifications Setup](#)

[Company Setup](#)

[Grades Setup](#)

[Medical Setups](#)

[Pay Elements Setups](#) ✓

[Payroll Setup](#)

[Calendar](#)

[Memos](#)

[System Alerts](#)

[Accounts](#)

[Administration](#)

PERSONNEL SYSTEM

PAYROLL

>>

HOME

CORE SETUP

Types

[Qualifications Setup](#)

[Company Setup](#)

[Grades Setup](#)

[Medical Setups](#)

[Pay Elements Setups](#) ✓

[Payroll Setup](#)

[Calendar](#)

[Memos](#)

[System Alerts](#)

[Accounts](#)

[Administration](#)

PERSONNEL SYSTEM

PAYROLL

Pay Elements

Select Transaction

☐ Pay Elements Definition

☐ Group Pay Elements

☒ Personnel Pay Elements ✓

Next ✓

Select the personnel whose pay elements you would like to edit, and modify the “VALUE”:

HOME

CORE SETUP

Types

[Qualifications Setup](#)

[Company Setup](#)

[Grades Setup](#)

[Medical Setups](#)

[Pay Elements Setups](#) ✓

[Payroll Setup](#)

[Calendar](#)

[Memos](#)

[System Alerts](#)

[Accounts](#)

[Administration](#)

### Pay Elements

[Previous](#)

#### Personnel Pay Elements

View Detach

Staff No	Personnel Name
4041 ✓	ADEEKO OMOGBOLAH
0001	ADEMESO LARRY
4015	ADENIJI-ADELE YASMI
4027	ADESANYA ANTHONY
4009	AJAYI EMMANUEL
4039	AKANJI BOLATITO
4031	ALAO KAYODE
4024	ANTHONY MAMI-ZEBA

### Pay Elements

[Previous](#)

#### Personnel Pay Elements

View Detach

Staff No	Personnel Name
4041 ✓	ADEEKO OMOGBOLAH
0001	ADEMESO LARRY
4015	ADENIJI-ADELE YASMI
4027	ADESANYA ANTHONY
4009	AJAYI EMMANUEL
4039	AKANJI BOLATITO
4031	ALAO KAYODE
4024	ANTHONY MAMI-ZEBA
4028	ASHADE ADEBOLA
4013	DARAMOLA ABDULMUJIBU
4038	EHIEH FRANCES
4012	FADI OLUREMI
4016	FATOKUN JOHNSON
4007	IDOWU OLUSEGUN
4036	ILOMUANYA SOMTO
4010	IRABOR NAOMI
4018	NLEBEMUO NGOZI
4001	OBISANYA ADESILE
4033	OGUCHE GODWIN
4037	OGUNREKUN KEHINDE
4023	OGUNREKUN OLUFEMI

**Personnel**

\* Personnel No. 4041 \* Status ---Status--- \* WEF 15-Jun-2017

WET \* Group Code CUSTPAY \* Group CUSTODIAN LIFE ASSURANCE L

\* Payroll Code MM \* Payroll MANAGERS PAYROLL Numerator

Denominator Days Value

\* Default Code \* Default Name

[Save](#)

#### Personnel Pay Elements

[New](#) [Edit](#) [Delete](#) [Generate Pay Elements](#)

View Detach

Code	Name	Status	% Rate	Employee % Rate	Actuals	Value	Amount
HLD	Housing Loan Deduction	ACTIVE				637200	0
PERF BONUS	Performance Bonus	ACTIVE					0
13TH MONTH	13th Month	ACTIVE				270884.39	22573.7
ENTERTAINM	Entertainment Allowance	ACTIVE				0	0
DIESEL	Diesel Allowance	ACTIVE				0	0
EDUCATION	Education Allowance	ACTIVE				174000	145000.00



**Personnel Pay Element**

* Code	13TH MONTH	* Pay Element	13th Month
* Status	ACTIVE	% Rate	
Employee % Rate		Actual	
Value	✓ 270884.39	Employer Amount	0
Employer Payroll Currency Amount	0	Round Off	
* Currency	NAIRA	* WEF	15-Jun-2017
WET			

Note that if an entrant is not entitled to any of the default pay elements (allowances) defined for the selected pay grade, then one can always delete the allowance so that it is not included in the amount payable to such personnel:

Select Allowance >> Delete:

**Pay Elements**

Previous

**Personnel Pay Elements**

View ▾

Staff No	Personnel Name
4041	ADEKO OMGBOLAH
0001	ADEMESO LARRY
4015	ADENIJI-ADELE YASMI
4027	ADESANYA ANTHONY
4009	AJAYI EMMANUEL
4039	AKANJI BOLATITO
4031	ALAO KAYODE
4024	ANTHONY MAMI-ZEBA
4028	ASHADE ADEBOLA
4013	DARAMOLA ABDULMUJ
4038	EHLEN FRANCES
4012	FADI OLUREMI
4016	FATOKUN JOHNSON
4007	IDOWU OLUSEGUN
4036	ILOMUANYA SOMTO
4010	IRABOR NAOMI
4018	NLEBEMUO NGOZI
4001	OBISANYA ADESILE
4033	OGUCHE GODWIN
4037	OGUNREKUN KEHINDE

**Personnel**

* Personnel No.	4041	* Status	ACTIVE	* WEF	15-Jun-2017
WET		* Group Code	CUSTPAY	* Group	CUSTODIAN LIFE ASSURANCE L
* Payroll Code	MM	* Payroll	MANAGERS PAYROLL	Numerator	
Denominator		Days		Value	
* Default Code		* Default Name			

Save

**Personnel Pay Elements**

New Edit Delete Generate Pay Elements

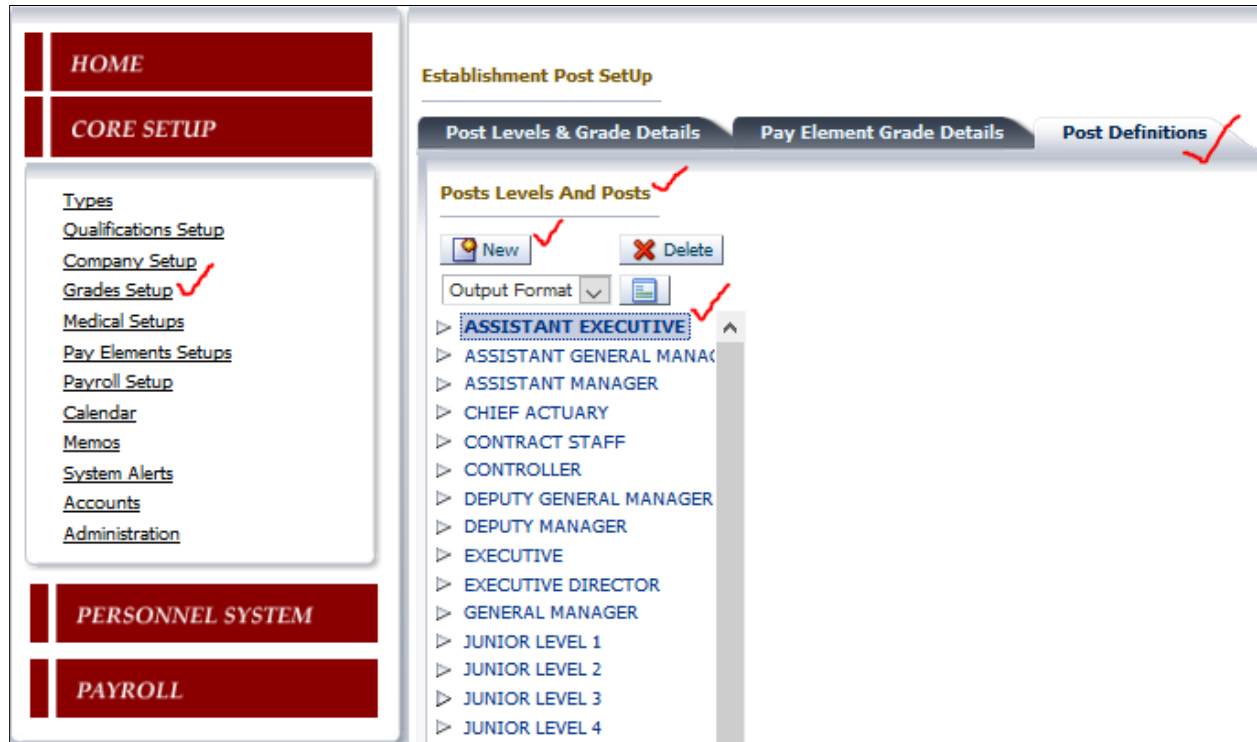
View ▾

Code	Name	Status	% Rate	Employee % Rate	Actuals	Value	Amount
HLD	Housing Loan Deduction	ACTIVE				637200	0
PERF BONUS	Performance Bonus	ACTIVE					0
13TH MONTH	13th Month	ACTIVE				270884.39	22573.7
ENTERTAINM	Entertainment Allowance	ACTIVE				0	0
DIESEL	Diesel Allowance	ACTIVE				0	0
EDUCATION	Education Allowance	ACTIVE				174001	145000.00

## Post Definition

Access:

LOG IN >> CORE SETUP >> GRADES SETUP >> POST DEFINITIONS



Select the post level as shown above, and click on the “NEW” button, in order to create a Post (Job Designation).

**Establishment Post SetUp**

Post Levels & Grade Details   Pay Element Grade Details   Post Definitions

**Posts Levels And Posts**

New ☒ Delete ☐

Output Format

☒ ASSISTANT EXECUTIVE  
☐ ASSISTANT GENERAL MANAGER  
☐ ASSISTANT MANAGER  
☐ CHIEF ACTUARY  
☐ CONTRACT STAFF  
☐ CONTROLLER  
☐ DEPUTY GENERAL MANAGER  
☐ DEPUTY MANAGER  
☐ EXECUTIVE  
☐ EXECUTIVE DIRECTOR  
☐ GENERAL MANAGER  
☐ JUNIOR LEVEL 1  
☐ JUNIOR LEVEL 2  
☐ JUNIOR LEVEL 3  
☐ JUNIOR LEVEL 4  
☐ JUNIOR LEVEL 5  
☐ MANAGER  
☐ MANAGING DIRECTOR  
☐ SENIOR EXECUTIVE

**Establishment Post Details**

\* Code  \* Description   
 Parent Post  \* Post Level   
 \* Status  \* WEF   
 \* Category  \* Branch   
 \* Sub-Division  Unit Level   
 Reason

☐ Current Post ☐ All Posts ☐ Staff with No one Reporting to them

**Post Qualifications**

View

Qualification	Qualification Grade	Qualification Level
No data to display.		

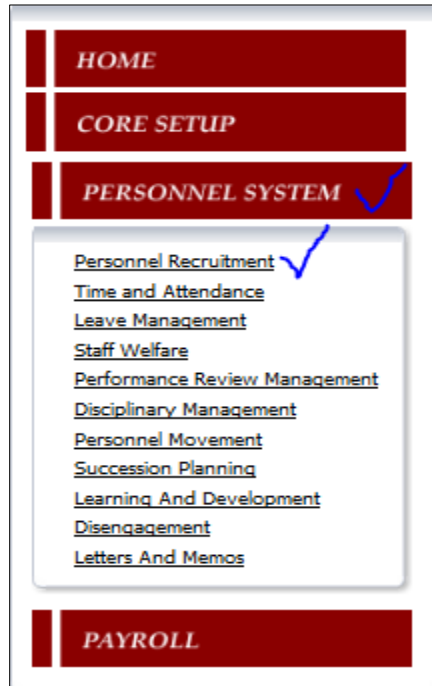
This area allows you to define the Job Designation. Posts are created under pre-defined Post Levels.

- For each post, the “Code” must be unique. For now, this will be keyed in manually, as we work on a way to automatically generate this.
- The “Description” will always be keyed in manually. This is the Job Designation (Name).
- The Parent Post should be the immediate supervisor that the personnel will report to. This can be a line manager or other senior post.
- Post Level is the grade/ level for the position
- Set the status as Active
- WEF Date is the post “With-Effect-From Date”, essentially the date from which such a newly created post was declared available for recruitment purposes. As the company grows, there will be new posts from time to time, and this field will show the date from which such posts were declared as active for the company to recruit for.
- Category: This will be LIFE. Custodian is using HRMS to manage the Life company personnel only.
- Select Branch as appropriate. For what branch has the post been created? Where the post be domiciled should be informed by the need for which it was created - where the person who occupies it will reside. E.g. Group Underwriter IKEJA - tag IKEJA Branch.
- Sub-Division - Tag the unit/department under which the post is created.

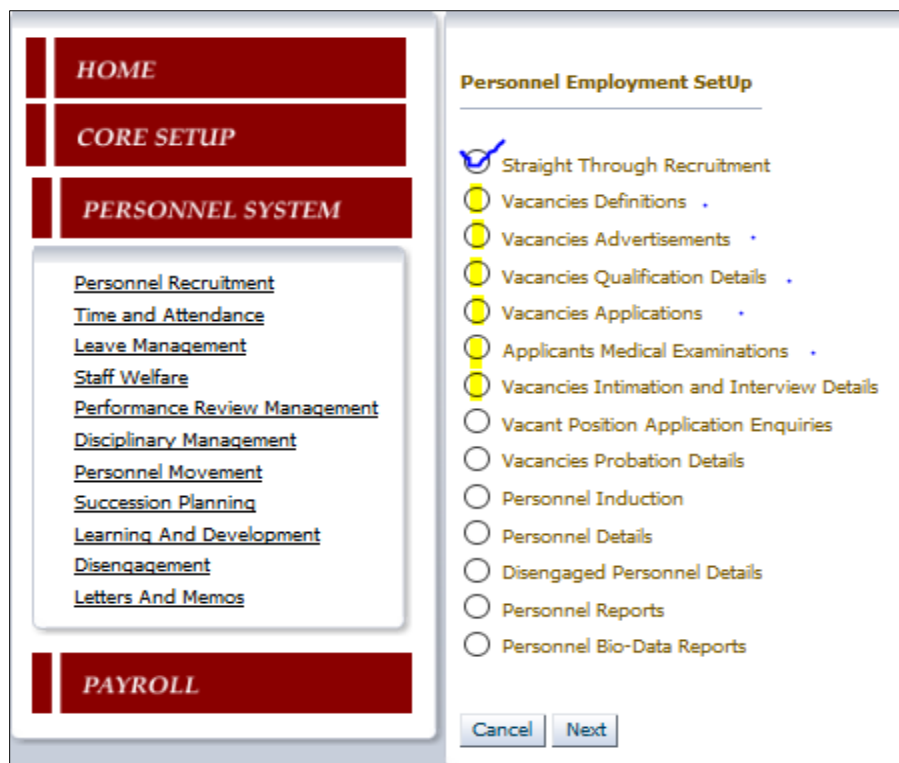
## RECRUITMENT – PROCESS

ACCESS:

LOG IN >> PERSONNEL SYSTEM >> PERSONNEL RECRUITMENT



A screenshot of a software interface showing a sidebar menu. The menu items are: HOME, CORE SETUP, PERSONNEL SYSTEM (highlighted with a blue checkmark), and PAYROLL. Under PERSONNEL SYSTEM, there is a list of sub-items: Personnel Recruitment (highlighted with a blue checkmark), Time and Attendance, Leave Management, Staff Welfare, Performance Review Management, Disciplinary Management, Personnel Movement, Succession Planning, Learning And Development, Disengagement, and Letters And Memos.



A screenshot of a software interface showing the 'Personnel Employment SetUp' screen. The sidebar menu is the same as the previous screenshot. The main content area is titled 'Personnel Employment SetUp' and contains a list of options with radio buttons: 

- ☒ Straight Through Recruitment
- ☐ Vacancies Definitions
- ☐ Vacancies Advertisements
- ☐ Vacancies Qualification Details
- ☐ Vacancies Applications
- ☐ Applicants Medical Examinations
- ☐ Vacancies Intimation and Interview Details
- ☐ Vacant Position Application Enquiries
- ☐ Vacancies Probation Details
- ☐ Personnel Induction
- ☐ Personnel Details
- ☐ Disengaged Personnel Details
- ☐ Personnel Reports
- ☐ Personnel Bio-Data Reports

At the bottom of the screen, there are two buttons: 'Cancel' and 'Next'.

## **Approach Options**

There are two options to do recruitment in the application:

- Straight Through Recruitment
- Step-wise Recruitment

Step-wise recruitment is highlighted in Yellow above. It means that you perform the recruitment process by accessing the separate links one by one. Straight through Recruitment means that you follow through the recruitment process without accessing screens and exiting from them one after the other as the case is with the Step-wise approach.

From the above screenshot, below are the steps required in order to employ a new entrant into the system:

- Define the Vacancy (Job designation to which you want to recruit) - select from already defined job designations as shown in “Post Definitions” above.
- Advertise the position: There is a media setup under Core Setup that can be used for this. This is not a compulsory step and can be skipped.
- Captured desired Qualification Details for the person who should fill this position
- Input details of applicants to this role - these are persons who responded to the application as advertised. The details here are not mandatory for the process to be completed.
- Where medical tests are a requirement during the recruitment process, such details are captured on “Applicants Medical Examinations”
- Intimation and Interview Details refers to Pre-Interview (Short-Listing) and the Interview process.
- From interview results, a decision is reached, on whether to employ or mark a candidate as unsuccessful.
- For personnel to be employed to the job role, select the Basic Pay Salary scale. The system then assigns them to allowances (with respective amounts) defined for that post level.

## **Straight-Through Recruitment**

To make the process as easy and friendly as possible, we will use the “Straight-Through” process/approach, documented as follows:

**Personnel Employment SetUp**

- ☒ Straight Through Recruitment
- ☐ Vacancies Definitions
- ☐ Vacancies Advertisements
- ☐ Vacancies Qualification Details
- ☐ Vacancies Applications
- ☐ Applicants Medical Examinations
- ☐ Vacancies Intimation and Interview Details
- ☐ Vacant Position Application Enquiries
- ☐ Vacancies Probation Details
- ☐ Personnel Induction
- ☐ Personnel Details
- ☐ Disengaged Personnel Details
- ☐ Personnel Reports
- ☐ Personnel Bio-Data Reports

[Cancel](#) [Next](#)

## Vacancy Definition

This is the immediate next screen that you will land on, upon hitting the “Next” button above. Defining the vacancy for the post that you wish to recruit into is the first step in the recruitment process. Below is the screen:

HOME

CORE SETUP

PERSONNEL SYSTEM

Personnel Recruitment

Time and Attendance

Leave Management

Staff Welfare

Performance Review Management

Disciplinary Management

Personnel Movement

Succession Planning

Learning And Development

Disengagement

Letters And Memos

PAYROLL

Previous Next

Vacancies Position Definition

New Delete

FINANCE AND ACCOUNTS

TECHNICAL

INTERNAL AUDIT

RETAIL ENTERPRISE

RETAIL SALES

ADMINISTRATION

GROUP LIFE

INDIVIDUAL LIFE

CORPORATE MARKETING

MD SECRETARIAT

HUMAN RESOURCES

ACTUARIAL SERVICES & RISK MAN

TECHNOLOGY

COMPLIANCE

Select department where the post exists, and click on “New” as highlighted above, in order to create declare a vacancy.

Capture details highlighted in yellow below:

The screenshot displays the 'Establishment Post Setup' application. On the left is a navigation menu with sections: HOME, CORE SETUP (containing Types, Qualifications Setup, Company Setup, Grades Setup, Medical Setups, Pay Elements Setups, Payroll Setup, Calendar, Memos, System Alerts, Accounts, and Administration), PERSONNEL SYSTEM, and PAYROLL. The main area is titled 'Establishment Post Setup' and has three tabs: 'Post Levels & Grade Details', 'Pay Element Grade Details', and 'Post Definitions' (which is active). Under 'Post Levels & Grade Details', there is a list of 'Posts Levels And Posts' with a 'New' button highlighted in yellow. The 'Establishment Post Details' form contains the following fields: \* Code (ASAEX), \* Description (CUSTOMER SERVICE ASST. EXEC), Parent Post (CUSTOMER SERVICE EXECUTIVE), \* Status (ACTIVE), \* WEF (02-Jan-2017), \* Category (LIFE), \* Sub-Division (RETAIL ENTERPRISE), \* Branch (HEAD OFFICE), and \* Unit Level (DEPT). Below these fields are buttons for 'Save', 'Output Format', 'Post Grade Details', and 'Pay Element Grade Details'. At the bottom, there is a 'Post Reporting' section with radio buttons for 'Current Post', 'All Posts', and 'Staff with No one Reporting to them'. A 'Post Qualifications' section at the very bottom has 'New', 'Edit', and 'Delete' buttons, and a table with columns 'Qualification', 'Qualification Grade', and 'Qualification Level', which currently shows 'No data to display.'

- Select post you want to declare vacant and employ a new person to
- Give a short description for the post, e.g. Underwriter
- A post can be declared vacant by an individual or by a department. Select either accordingly, and choose from the drop-down list
- Indicate the Declared Date - date when the post was declared vacant, maybe when its former occupant left the organization.
- The WEF Date is the date from which the vacancy, as defined, should be vacant and available for filling with a new recruit.

To illustrate the Recruitment Process, I will create a new post, “Customer Service Assistant Executive”, under the Retail Services Department:

This should then be saved - use the “Save” button.

HOME

CORE SETUP

PERSONNEL SYSTEM

Personnel Recruitment

Time and Attendance

Leave Management

Staff Welfare

Performance Review Management

Disciplinary Management

Personnel Movement

Succession Planning

Learning And Development

Disengagement

Letters And Memos

PAYROLL

Previous

Next

Vacancies Position Definition

New

Delete

FINANCE AND ACCOUNTS

TECHNICAL

INTERNAL AUDIT

RETAIL ENTERPRISE

CUSTOMER SERVICE ASST. EXEC

RETAIL SALES

ADMINISTRATION

GROUP LIFE

INDIVIDUAL LIFE

CORPORATE MARKETING

MD SECRETARIAT

HUMAN RESOURCES

ACTUARIAL SERVICES & RISK MAN

TECHNOLOGY

COMPLIANCE

Vacancy Position Details

\* Post

CUSTOMER SERVICE ASST. EXEC

\* Short Description

CUSTOMER SERVICE AST. EXEC

\* Status

Open

Number Employed

0

\* Declared Date

02-Jan-2017

Authorized Date

Min Age Limit

Max Age Limit

\* WEF

02-Jan-2017

\* Declared By

Department

RETAIL ENTERPRISE

Authorized By

\* Type

Open

\* Min Age Limit Strict?

No

\* Max Age Limit Strict?

No

Sub Division

RETAIL ENTERPRISE

Save

Authorize

Output Format

Output Format

Vacant Position Panel Members

Job Description

Vacant Position Criteria

New

Delete

View

Detach

Con Code

Names

No data to display.

Define also, HR or other personnel who should attend interviews for the defined post. A brief on the job description and criteria to look out for can also be captured in the respective tabs.

Previous

Next

Vacancies Position Definition

New

Delete

FINANCE AND ACCOUNTS

TECHNICAL

INTERNAL AUDIT

RETAIL ENTERPRISE

CUSTOMER SERVICE ASST. EXEC

RETAIL SALES

ADMINISTRATION

GROUP LIFE

INDIVIDUAL LIFE

CORPORATE MARKETING

MD SECRETARIAT

HUMAN RESOURCES

ACTUARIAL SERVICES & RISK MAN

TECHNOLOGY

COMPLIANCE

Vacancy Position Details

\* Post

CUSTOMER SERVICE ASST. EXEC

\* Short Description

CUSTOMER SERVICE AST. EXEC

\* Status

Open

Number Employed

0

\* Declared Date

02-Jan-2017

Authorized Date

Min Age Limit

Max Age Limit

\* WEF

02-Jan-2017

\* Declared By

Department

RETAIL ENTERPRISE

Authorized By

\* Type

Open

\* Min Age Limit Strict?

No

\* Max Age Limit Strict?

No

Sub Division

RETAIL ENTERPRISE

Save

Authorize

Output Format

Output Format

Vacant Position Panel Members

Job Description

Vacant Position Criteria

New

Delete

View

Detach

Con Code

Names

4015	MRS. YASMIN ADENIJI-ADELE
4057	MRS. TIWALOPE OMIDIRAN

Once defined, authorize the vacant position to proceed.



Previous **Next**

### Vacancies Position Definition

**New** **Delete**

- FINANCE AND ACCOUNTS
- TECHNICAL
- INTERNAL AUDIT
- RETAIL ENTERPRISE
  - CUSTOMER SERVICE ASST. EXEC.**
- RETAIL SALES
- ADMINISTRATION
- GROUP LIFE
- INDIVIDUAL LIFE
- CORPORATE MARKETING
- MD SECRETARIAT
- HUMAN RESOURCES
- ACTUARIAL SERVICES & RISK MAN
- TECHNOLOGY
- COMPLIANCE

#### Vacancy Position Details

\* Post: CUSTOMER SERVICE ASST. EXEC. \* Short Description: CUSTOMER SERVICE AST. EXEC

\* Status: Open

Number Employed: 0

\* Declared Date: 02-Jan-2017

Authorized Date:

Min Age Limit:

Max Age Limit:

\* WEF: 02-Jan-2017

\* Declared By: Department: RETAIL ENTERPRISE

Authorized By:

\* Type: Open

\* Min Age Limit Strict?: No

\* Max Age Limit Strict?: No

Sub Division: RETAIL ENTERPRISE

**Save** **Authorize** Output Format: Output Format

#### Vacant Position Panel Members

**New** **Delete**

View: **Job Description** **Vacant Position Criteria**

View: **Detail**

Con Code	Names
4015	MRS. YASMIN ADENIJI-ADELE
4057	MRS. TIWALOPE OMIDIRAN

## Vacancy Advertisements

This area allows you to set up advertisement media to be used in advertising the vacant position. This can be social media, print media, television, radio, recruitment consultants etc. Note that there is an area where these media setups are done: CORE SETUP >> TYPES >> MEDIA SETUP.

### Vacancies Advertisements SetUp

#### Vacancy Advertisements

**New** **Edit** **Delete** **Authorize** Output Format: Output Format

View: **Detail**

Drafted By	Drafting Date	Application Deadline	Forwarding Address	Authorized By	Authorization Date
No data to display.					

#### Advertisement Media

**New** **Edit** **Delete**

View: **Detail**

Media Code	Media	Fee Amount	Currency Code	Currency	LPO No	Dispatch Date	Expected Running Date	Running Date	Remarks
No data to display.									

**Vacancies Advertisements Setup**

**Vacancy Advertisements**

New
 Edit
 Delete
 Authorize
 Output Format
 Output Format

View Detach

Drafted By	Drafting Date	Application Deadline	Forwarding Address	Authorized By	Authorization Date
MRS. YASMIN ADENIJI-ADELE	16-Jan-2017	16-Jan-2017	karurijoel@gmail.com		

**Advertisement Media**

New
 Edit
 Delete

View Detach

Media Code	Media	Fee Amount	Currency Code	Currency	LPO No	Dispatch Date	Expected Running Date	Running Date
TWT	TWITTER	25,000.00	NGN	NAIRA	456	16-Jan-2017	16-Jan-2017	16-Jan-2017

Approval for the advertisement may apply, especially where charges are incurred, say when advertising through print media, television or radio.

Previous Next

**Vacancies Advertisements Setup**

**Vacancy Advertisements**

New
 Edit
 Delete
 Authorize
 Output Format
 Output Format

View Detach

Drafted By	Drafting Date	Application Deadline	Forwarding Address	Authorized By	Authorization Date
MRS. YASMIN ADENIJI-ADELE	16-Jan-2017	16-Jan-2017	karurijoel@gmail.com	MISS. FRANCES EHIEN	25-Oct-2017

**Information**

Vacancy Advertisement Successfully Authorized

OK

**Advertisement Media**

New
 Edit
 Delete

View Detach

Media Code	Media	Fee Amount	Currency Code	Currency	LPO No	Dispatch Date	Expected Running Date	Running Date	Remarks
TWT	TWITTER	25,000.00	NGN	NAIRA	456	16-Jan-2017	16-Jan-2017	16-Jan-2017	

## Qualification Details

In this section, we capture the qualification requirements associated with the job role for which we are recruiting. The pre-requisite to this Qualification Details setup is:

- Set up Qualifications: CORE SETUP >> QUALIFICATIONS SETUP

PreviousNext

Vacancies Qualification Details

Vacant Qualifications

NewEditDelete

Output FormatOutput Format

ViewDetach

Min Average Marks	Qualification Code	Qualification	Qualification Grade Code	Qualification Grade
No data to display.				

Qualification Subjects

NewEditDelete

ViewDetach

Minimum Marks	Subject Group Code	Subject Group	Group Subject Code	Group Subject
No data to display.				

This is not a mandatory step and can be stepped, especially where it does not matter what specific qualifications are desired for a personnel to fill the vacant position. This could apply where you have a job role that does not require specialized skills.

### Capture Applicant Details

Here, we capture the names and other details for each of the applicants who express their interest in the job role as advertised. To minimize the number of applicants that must be captured here, a screening process probably needs to be done first, to identify persons who at least meet minimum expectations/qualifications for the application.

**Vacancy Applicant**

* Name Prefix	MS.	* First Name	TOPE
Middle Name		* Last Name	OGUNDARE
* Status	APPOINTED	* Gender	Female
* Marital Status	Single	* Date Of Birth	14-Oct-1992
* Application Date	04-Jul-2017	* Receipt Date	04-Jul-2017
Expected Salary		* Email Address 1	tope@gmail.com
Email Address 2		Years Of Experience	
* Telephone No1	07035896471	Telephone No2	
Postal Address			
Country	NIGERIA		
State/County		Ethnic Origin	
Religion Code			

Save Cancel

Capture, also other applicant details as provided for in the tabs below:

Previous Next

**Vacancies Applications**

**Vacancy Applicants**

New Edit Delete Output Format Output Format

View Detach

Number	Name Prefix	First Name	Middle Name	Last Name	Status	Gender	Marital Status	Date Of Birth	Application Date	Receipt Date
365	MS.	TOPE		OGUNDARE	APPOINTED	Female	Single	14-Oct-1992	04-Jul-2017	04-Jul-2017

<

**Education Background** Work Background Referees Certifications Qualifications Special Courses Achievements

New Edit Delete

View Detach

WEF	WET	School Type	School	Course	Grade
No data to display.					

- Education Background
- Work Background
- Referees
- Certifications
- Qualifications
- Specializations
- Achievements

## Applicant Medicals

**Vacancies Applicants Medical Examinations**

**Vacancies Applicants**

Output Format: Output Format ▾

View ▾ [New] [Delete] [Detach]

Number	Name Prefix	First Name	Middle Name	Last Name	Gender	Marital Status	Date Of Birth	Date Of Application	Date Of Receipt	Postal Address	Status
365	MS.	TOPE		OGUNDARE	Female	SINGLE	14-Oct-1992	04-Jul-2017	04-Jul-2017		APPOINTED

Columns Hidden: 8

**Applicant Medical Exams Group** **Applicant Medical Exams**

[New] [Delete]

View ▾ [New] [Delete] [Detach]

Medical Institution Code	Medical Institution	Medical Group Code	Medical Group	Date
STLUK	SAINT LUKES HOSPITAL	PET	PRE-EMPLOYMENT TEST	18-Jul-2017

This area is used to capture applicant pre-interview medical details, where applicants for a role need to provide medical examination results as directed/advised by the company. The Setups that specify which medical institutions (hospitals etc.) and medical examinations to take are done under CORE SETUP:

CORE SETUP >> MEDICAL SETUPS

## Short-Listing/Pre-Interviews

From applications received, we proceed to short list candidates who meet minimum criteria for the next step - interviews. The first tab in this area allows one to capture the recommender/ person who comes up with the short-listed candidates, and the date when they do/did this:

**Vacancies Intimation And Interviews**

**Short-Listing/Pre-Interview** **Shortlisted Applicants** **Interviews** **Interviewed Applicants** **Interview Details** **Panel Members Details**

[New] [Edit] [Delete] Output Format: Output Format ▾ [New]

View ▾ [New] [Delete] [Detach]

Recommended By Code	Recommended By	Recommended Date	Reference No.
4037	MRS. KEHINDE OGUNREKUN	18-Jul-2017	

Next, we capture the actual candidates short-listed in the next tab - Short Listed Applicants.

## Short Listed Applicants

The screen is as shown below:

Applicant Name	Intimated By Code	Intimated By	Intimation Date	Postal Address	Email Address	Telephone	Interview Date	Venue	Remarks
MS. TOPE OGUND...	4037	MRS. KEHINDE O...	18-Jul-2017				24-Jul-2017	HEAD OFFICE	INVITED FOR

Capture details as below:

\* Applicant Name ✓

\* Intimated By Code ✓

\* Intimated By

\* Intimation Date ✓

Postal Address

Email Address

Telephone

\* Interview Date ✓

\* Venue ✓

\* Remarks ✓

Save Cancel

- Applicant Name - the system will spool names of applicants to this role. Select those that minimum requirements - those to be short-listed
- Intimated By Code - This is the recommender/ person who does/did the short-listing. When you click on the drop-down menu, the system spools names of all Custodian personnel.
- Intimation Date - This is the date of short-listing
- Interview Date- Capture the interview date set for each candidate
- Venue - Venue of interview
- Remarks - Comments on the details captured

With this done, the next step will be interviews for short-listed candidates.

## Interviews

Screen is as shown below:



The first step here is to indicate the type or types of interviews that short-listed candidates will do. These include:

- Aptitude Tests
- Oral Interviews
- Practical Test
- Written Interviews

For each of these categories of interviews, indicate the total (maximum) marks, against which candidates will be graded.

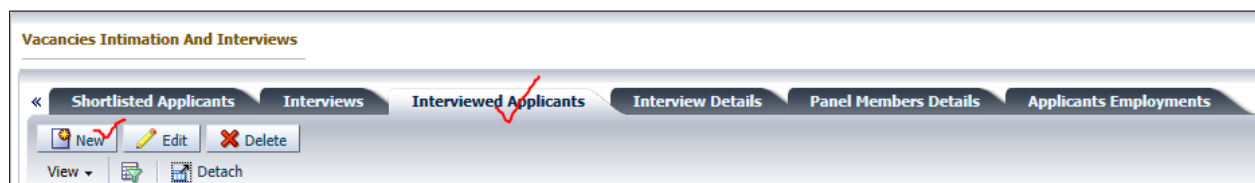
- Interview Level Code - select the interview type: oral, written, online, aptitude

- Compiled by Code - From the drop-down list, select the (HR) personnel who captured the details
- Compilation Date - This is the date of capturing these interview details
- Total Marks - Indicate marks scored by each candidate
- Remarks - Select from drop-down list: “Successful”, “Not Successful”, “Keep in View”
- Comments - Input remarks such as expected selection criteria on candidate performance at interview, e.g. “Pass Mark = 60”

In the next tab, we capture the remarks of each of the panel members who sat through interviews with the short-listed candidates. This is done from the “Interviewed Applicants” window as follows:

### Interviewed Applicants

Under this tab, we capture the details of each interviewer’s recommendation on the performance of the short-listed and subsequently interviewed candidates:





- Select panelist whose details you want to capture (The drop down list spools names of panel members who were tagged to the interview panel for this post - at the point of creating the post)
- Type - select interview for which you want to detail the panel member remarks
- Interview - From the drop-down list, select the interview for which you want to capture the panel member recommendations
- Marks obtained - Indicate marks scored by interviewed applicant
- Date - Date when the interview was done
- Data Reason - in case the person was interviewed on a date different from the originally scheduled interview date, indicate reason for this, e.g. "Interview was rescheduled due to interviewer availability"
- Remarks - Indicate the comments given by the panelist.
- Save the record

Vacancies Intimation And Interviews								
« Shortlisted Applicants Interviews Interviewed Applicants Interview Details Panel Members Details Applicants Employments								
New Edit Delete								
View Detach								
Panel Member	Applicant	Interview Code	Interview Level	Type	Date	Date Reason	Marks Obtained	Remarks
MRS.YASMIN ADENIDI-ADELE	MS. TOPE OGUNDARE	OR-CUST	ORAL INTERVIEW	Oral	24-Jul-2017		60	SUITABLE - EMPLOY
MRS.KEHINDE OGUNREKUN	MS. TOPE OGUNDARE	OR-CUST	ORAL INTERVIEW	Oral	24-Jul-2017		61	SUITABLE - EMPLOY
MRS.TIWALOPE OMIDIRAN	MS. TOPE OGUNDARE	OR-CUST	ORAL INTERVIEW	Oral	24-Jul-2017		63	SUITABLE - EMPLOY

The next two tabs are view windows that show a summary of the data captured in this area. They are as follows:

### Interview Details

This tab shows a summary of the marks awarded to each candidate by the panel members:

Vacancies Intimation And Interviews

<<

Interviews

Interviewed Applicants

Interview Details

Panel Members Details

Applicants Employments

Unsuccessful Applicants

Interviewed Applicants

Detach

Number	Names	Date Of Birth	Date of Application	Date Of Receipt
365	MS. TOPE OGUNDARE	14-Oct-1992	04-Jul-2017	04-Jul-2017

Columns Hidden 15

Interviewee Details

View ▾

Detach

Con Code	Names	Interview Date	Interview Type	Total Marks	Marks Awarded
4015	MRS. YASMIN ADENIJI-ADELE	24-Jul-2017	Oral	70	60
4037	MRS. KEHINDE OGUNREKUN	24-Jul-2017	Oral	70	61
4057	MRS. TIWALOPE OMIDIRAN	24-Jul-2017	Oral	70	63

## Panel Member Details

This area shows the recommendation details that each panelist gave for each of the candidates interviewed, and for each of the interview types conducted.

The details are displayed as shown below:

Vacancies Intimation And Interviews

<<

Interviews

Interviewed Applicants

Interview Details

Panel Members Details

Applicants Employments

Unsuccessful Applicants

Vacant Position Panel Members

View

Detach

Con Code	Names
4015	MRS. YASMIN ADENIJI-ADELE
4037	MRS. KEHINDE OGUNREKUN
4057	MRS. TIWALOPE OMIDIRAN

Interviewing Details

View

Detach

Number	Names	Interview Type	Interview Date	Date Reason	Total Marks	Marks Obtained	Remarks
365	MS. TOPE OGUNDARE	Oral	24-Jul-2017		70	60	SUITABLE - EMPLOY

In the next tab, we capture which of the candidates is successful to be employed to the job role/post as determined from the interview results.

## Applicants Employments

Select the applicant from the list below the main tab:

**Vacancies Intimation And Interviews**

« Interviews Interviewed Applicants Interview Details Panel Members Details Applicants Employments **Unsuccessful Applicants**

Next Unemploy Marked Applicant Unsuccessful Applicant? Create Posts

View Detach

### Unsuccessful Candidates

Applicants who don't qualify for the post/job role after the interviews will be marked as unsuccessful, using the "Unsuccessful Applicant?" button. Such candidates are logged under the tab on the extreme right - "Unsuccessful Applicants". Such applicants can be reused to fill other positions interviewed for in the future.

**Vacancies Intimation And Interviews**

« Interviews Interviewed Applicants Interview Details Panel Members Details Applicants Employments **Unsuccessful Applicants**

Reuse Employee?

View Detach

Names	Group Code	Group Name	Personnel No	WEF Date	Personnel No.	Payroll Code	Payroll	Basic Salary
No data to display.								

### Employ

For a candidate who is successful after the interviews, we use the "Next" button to proceed to assigning the individual to a grade and employing them.

On clicking on "Next", the system will redirect you to a different window, from where you assign the grade, indicate basic pay (if customized) and the payroll to which the new employee is to be tagged, among other setups as shown below:

**Applicants Selected For Employment**

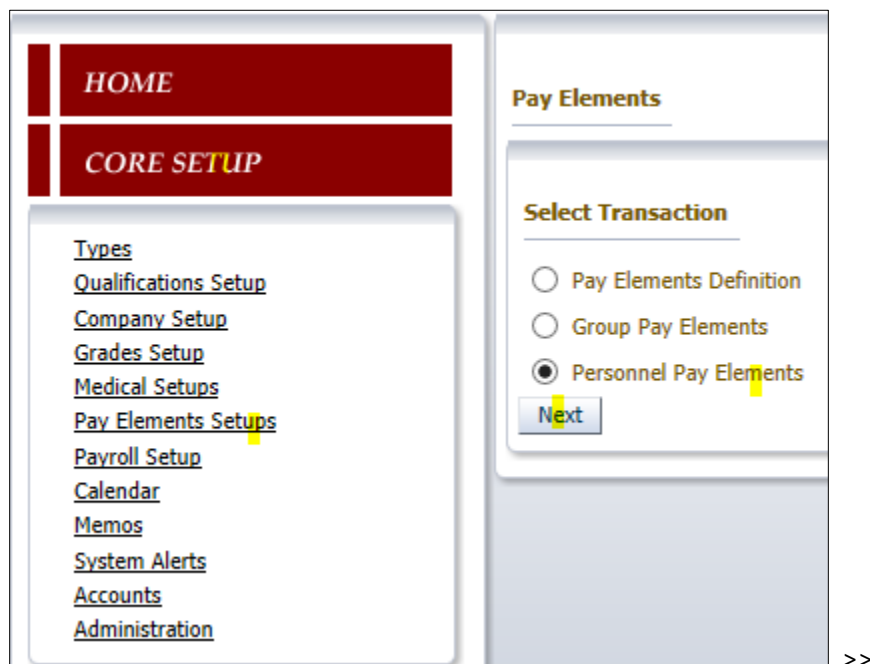
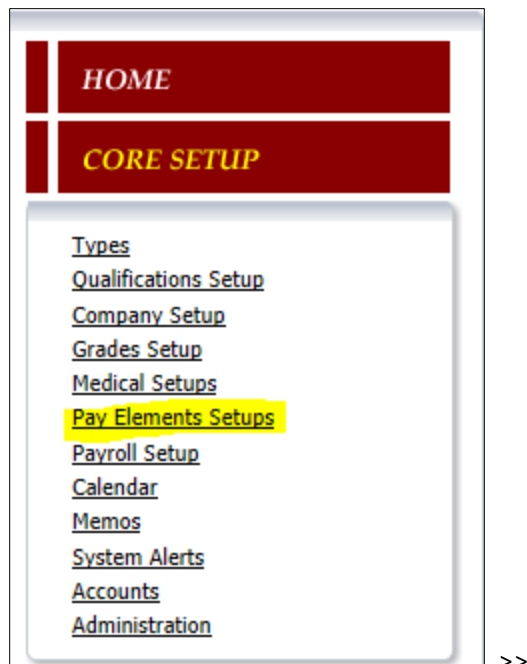
Employ?

View Detach

Number	Names	PostCode	Post Description	Basic Pay	WEF	Status
365	TOPE OGUNDARE	CUSTSERV	CUSTOMER SERVICE EXECUTIVE			PENDING

- Group Name - Select the Name of the Payroll Group (Custodian Life Assurance Limited)
- Post Grade - Select Post Grade into which the successful applicant is being employed
- Basic Pay - if the pay is customized, the system allows you to edit the Basic Allowance amount entitled to this entrant. If not customized, the system will automatically pick the min, mid or max amount as defined for each of the grades.
- Payroll - Pick the Payroll under which the candidate will be listed, e.g. Junior Payroll, Managers' Payroll, Senior Management Staff Payroll
- WEF Date - This is the personnel with-effect-from date, i.e. date of employment. The system will compute allowances entitled to this candidate from this date on (pro-rating where the candidate joins Custodian mid-period).
- On Probation? - Indicate whether the applicant is to be put on probation at the point of employment or not. The default probation period is as set up under Core Setup - 6 months for Custodian
- Save - Once all the above details are captured, save the record. The system automatically populates allowances defined for this grade to the new employee. An employee number is automatically assigned to the joiner.

In case the new employee also has other customized allowances, other than the basic pay, access **Personnel Pay Elements** (Core Setup >> Pay Elements Setups >> Personnel Pay Elements) to do this:



Filter by Personnel Name or number, select personnel, pick pay element to edit and click on the edit button:

**Pay Elements**

Previous

**Personnel Pay Elements**

View Detach

Staff No	Personnel Name
4058	OGUNDARE TOPE

**Personnel**

\* Personnel No. 4058 \* Status ---Status--- \* WEF 01-Aug-2017

WET \* Group Code CUSTPAY \* Group CUSTODIAN LIFE ASSURANCE LTC

\* Payroll Code OTHERS \* Payroll OTHER STAFF PAYROLL Numerator

Denominator Days Value

\* Default Code \* Default Name

Save

**Personnel Pay Elements**

New Edit Delete Generate Pay Elements

View Detach

Code	Name	Status	% Rate	Employee % Rate	Actuals	Value	Amount	Payroll Currency Amount
13TH MONTH	13th Month	ACTIVE				174172.29	14514.36	14514.36
ENTERTAINM	Entertainment Allowance	ACTIVE				0	0	0
DIESEL	Diesel Allowance	ACTIVE				0	0	0
EDUCATION	Education Allowance	ACTIVE				0	0	0
STEWARD	Steward Allowance	ACTIVE				0	0	0
SECURITY	Security Allowance	ACTIVE				0	0	0
MEDICAL	Medical Allowance	ACTIVE				190631.4	15885.95	15885.95
LEAVE ALLOW	Leave Allowance	ACTIVE				14067.0	14067.0	14067.0

Edit the “Value” field as shown below, and save:

**Personnel Pay Element**

\* Code 13TH MONTH

\* Status ACTIVE

Employee % Rate

Value 174172.29

Employer Payroll Currency Amount 0

\* Currency NAIRA

WET

\* Pay Element 13th Month

% Rate

Actual

Employer Amount 0

Round Off

\* WEF 01-Aug-2017

Save Cancel

With this done (all allowances confirmed correct for new entrants), the employee allowances detail is complete. Note that the Basic Pay is not editable at this point. This should be determined at the point of employing personnel as previously highlighted.

# PAYROLL

## Personnel Payment Details

This setup is necessary for Payroll. Capture the new entrant's bank details to facilitate payroll processing.

Prior to this setup, populate the contract details for this new employee to their respective payroll as follows:

CORE SETUP >> ADMINISTRATION >> ROLES PAYROLLS >> Populate Role with Payroll Contracts

**HOME**

**CORE SETUP** ✓

- Types
- Qualifications Setup
- Company Setup
- Grades Setup
- Medical Setups
- Pay Elements Setups
- Payroll Setup
- Calendar
- Memos
- System Alerts
- Accounts
- Administration ✓

**PERSONNEL SYSTEM**

**Payroll Roles**

Previous

New Delete

MANAGERS PAYROLL

MANAGEMENT STAFF PAYROLL

**OTHER STAFF PAYROLL** ✓

**Roles Payrolls** ✓

New Edit Delete

View Detach

Code	Payroll	Status
OTHERS	OTHER STAFF PAYROLL ✓	ACTIVE

**Payroll Contracts**

New Edit Delete

Populate Role With Payroll Contracts ✓

Payment Details Access:

PAYROLL >> PERSONNEL PAYMENT DETAILS

HOME

CORE SETUP

PERSONNEL SYSTEM

PAYROLL

[Master Definitions](#)  
[Pay Element Rates](#)  
[Personnel Payment Details](#)  
[Personnel Payment Details Exceptions](#)  
[Periodic Transactions](#)  
[Payroll Progress](#)  
[Off Payroll Processing](#)  
[Payable Deductions](#)  
[Loans](#)  
[Salary Arrears](#)  
[Contribution/Cumulative Balances Setup](#)  
[Deduction Balances Setup](#)  
[Reports](#)

### Personnel Payment Details

View ▾ Detach

%TOPE%

Personnel Names

OGUNDARE TOPE

Below are the setups required:

Bank Branches

Pay Points

Pension Details

Pay Currencies

Pay Methods

Pay Method Currencies

New

Edit

Delete

View ▾ Detach

- Set up the Bank details by selecting the bank and branch names from the list of banks and branches defined. Type in bank account number, mark “Active” and save record.

Bank Branches

Pay Points

Pension Details

Pay Currencies

Pay Methods

Pay Method Currencies

New

Edit

Delete

View ▾ Detach

Branch Ref. Code	Bank Name	Branch Name	Account Number	% Rate	WEF Date	Status
221-159522	STANBIC-IBTC BANK PLC	AWOLOWO ROAD	454884518	100	01-Aug-2017	ACTIVE

- Pay Points - This is the default Custodian pay point, i.e. the bank from which the company makes its payments from. This bank will be tagged when payroll is authorized



into Finance. However, since Finance department knows which account to pay from, the system allows them to edit the paying bank account.

Code	Description	WEF Date	Status
FIRST	FIRST BANK NIGERIA PLC	01-Aug-2017	ACTIVE

The WEF Date should be the personnel's date of employment, or any time thereafter (when they are to be paid through payroll after employment).

- Pay Currencies - Set up default pay currency - Naira - for all personnel

Currency Symbol	Currency	% Rate	Status	WEF Date
NGN	NAIRA	100	ACTIVE	01-Aug-2017

100% Rate means that allowances to this personnel are payable 100% in the currency defined (Naira). Set status as "Active". The WEF Date should be the personnel's date of employment, or any time thereafter (when they are to be paid through payroll after employment).

- Pay Methods - Indicate pay method to be used in processing pay for the personnel

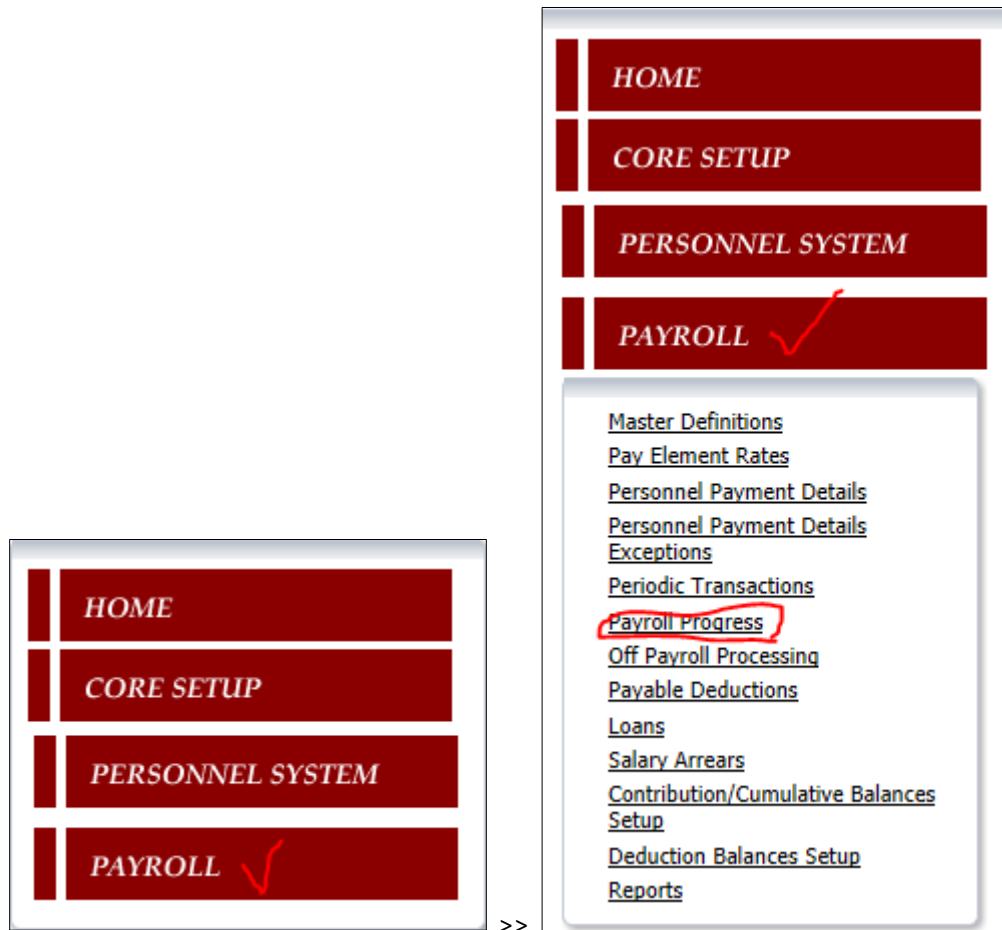
Code	Description	% Rate	Status	WEF Date
DFT	BANK (ELECTRONIC FUND) TRANSFER	100	ACTIVE	01-Aug-2017

100% Rate means that allowances to this personnel are payable 100% using the pay method defined (Bank Transfer). Set status as "Active". The WEF Date should be the personnel's date of employment, or any time thereafter (when they are to be paid through payroll after employment).

With the allowances and payment details defined, the new employee is ready to be included in the next payroll run.

### Payroll Run

ACCESS: PAYROLL >> PAYROLL PROGRESS



### Pre-Processing

This is the first of three steps in running monthly payroll for recurrent allowances. In this step, the system will validate that basic setups required for a payroll have been done. The system also populates, for the selected period, allowances applicable per active contract. This makes sure that all allowances and associated deductions per personnel are correct before payroll is processed.

HOME

CORE SETUP

PERSONNEL SYSTEM

PAYROLL

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Pay Element Rates

Personnel Payment Details

Personnel Payment Details Exceptions

Periodic Transactions

Payroll Progress

Off Payroll Processing

Payable Deductions

Loans

Salary Arrears

Contribution/Cumulative Balances Setup

Deduction Balances Setup

Reports

Select Transaction

☒ Pre-Processing ✓  
☐ Processing  
☐ Rollback  
☐ Authorization  
☐ Cheque Payments (Personnel without bank details)  
☐ Payslip Inquiry  
☐ Email Payslips  
☐ Reports

Next ✓

Previous

Payroll Period Progress

OTHER STAFF PAYROLL ✓

MANAGEMENT STAFF PAYROLL

MANAGERS PAYROLL

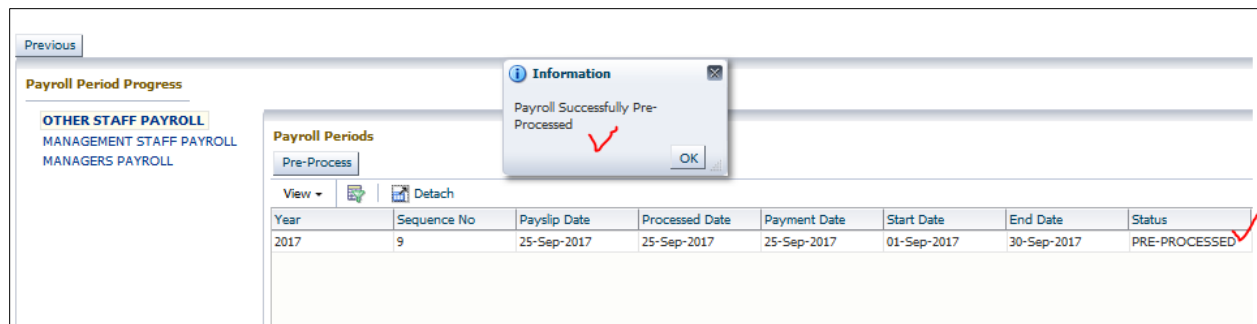
Payroll Periods

Pre-Process ✓

View ▾ Detach

Year	Sequence No	Payslip Date	Processed Date	Payment Date	Start Date	End Date	Status
2017	9 ✓	25-Sep-2017	25-Sep-2017	25-Sep-2017	01-Sep-2017	30-Sep-2017	IDLE

- Select payroll
- Select period
- Pre-process payroll



## Processing

“Processing” is the second step in this process. Here, we process payroll for verified payroll periods. This means payroll periods whose setups have been confirmed to have been done. Tax computation is also done at this point, based on the set rules/rates table. A validation is done at this stage, for all personnel payment details. These are necessary since personnel payments will be processed to the defined/verified bank account details as setup under “Personnel Payment Details”. The system also checks, in the same breath, that payment methods and payment currencies have been defined for all personnel to be included in the payroll being run.

The expected outcome, from this stage, is as follows for each active contract:

- Gross Taxable Pay computed (All Earnings each personnel is entitled to)
- Deductions are computed (Such as Pension, Insurance Premiums etc.)
- Net Taxable Pay is computed (as Gross Taxable Pay minus Deductions allowable for Tax - e.g. Pension and Insurance Premiums that are deducted before computing Tax)
- Tax is computed - this is based on the rules set for tax computation, such as a rates table (where tax is computed on a graduated scale)
- Net Pay is computed (Gross Taxable Pay minus Tax)
- With all these computed, all details should be displayed on the individuals’ pay slips

Select Transaction

☐ Pre-Processing
 ☒ Processing ✓
 ☐ Rollback
 ☐ Authorization
 ☐ Cheque Payments (Personnel without bank details)
 ☐ Payslip Inquiry
 ☐ Email Payslips
 ☐ Reports

Next ✓

&gt;&gt;

Previous

Payroll Period Progress

MANAGERS PAYROLL

MANAGEMENT STAFF PAYROLL

OTHER STAFF PAYROLL ✓

Payroll Periods

Process ✓

View ▾ Detach

Year	Sequence No	Payslip Date	Processed Date	Payment Date	Start Date	End Date	Status
2017	9 ✓	25-Sep-2017	25-Sep-2017	25-Sep-2017	01-Sep-2017	30-Sep-2017	PRE-PROCESSED

Rows Selected 1 Columns Hidden 1

Groups Personnel

View ▾ Detach

Code	Name	WEF Date	Probation Period	Status
CUSTPAY	✓ CUSTODIAN LIFE ASSURANCE LTD PAYROLL	01-Jan-1970	6	ACTIVE

You can also view the personnel under the selected payroll before processing, to ascertain that all expected contracts are included on the payroll that you want to run:

**Payroll Period Progress**

MANAGERS PAYROLL  
MANAGEMENT STAFF PAYROLL  
**OTHER STAFF PAYROLL** ✓

**Payroll Periods**

Process ✓

View ▾

Year	Sequence No	Payslip Date	Processed Date	Payment Date	Start Date	End Date	Status
2017	9 ✓	25-Sep-2017	25-Sep-2017	25-Sep-2017	01-Sep-2017	30-Sep-2017	PRE-PROCESSED

Rows Selected 1 Columns Hidden 1

**Groups** **Personnel** ✓

View ▾

Personnel No.	Personnel	WEF Date	WET Date
4005	OYELEKE SULAIMAN	01-Jul-2013	
4006	OMOETAN PRECIOUS	01-Jul-2013	
4007	IDOWU OLUSEGUN	01-Jul-2013	
4009	AJAYI EMMANUEL	01-Jul-2013	
4010	IRABOR NAOMI	01-Jul-2013	
4012	FADI OLUREMI	15-Jul-2013	
4013	DARAMOLA ABDULMUJEEB	01-Jul-2013	
4014	LIBERT CINDRAY	01-Jul-2013	

Payroll is successfully processed:

[Previous](#)

**Payroll Period Progress**

MANAGERS PAYROLL  
MANAGEMENT STAFF PAYROLL  
**OTHER STAFF PAYROLL**

**Payroll Periods**

Process

View ▾

Year	Sequence No	Payslip Date	Processed Date	Payment Date	Start Date	End Date	Status
No data to display.							

Columns Hidden 1

**Groups** **Personnel**

View ▾

Code	Name	WEF Date	Probation Period	Status
CUSTPAY	CUSTODIAN LIFE ASSURANCE LTD PAYROLL	01-Jan-1970	6	ACTIVE

**Information**

Payroll Successfully Processed ✓

OK

## Rollback

In case there are errors on the payroll as processed (which can be discovered through/confirmed from individual pay slips or the Net Pay Report), a payroll can be rolled back. The system undoes/reverts details processed in the stage above (Processing), and allows you to go back to step 1 (Pre-Processing) and redo the process. Such errors may result from instances where employee allowances are misrepresented, due to erroneous data capture. Note that this is only applicable to payrolls that have only been processed awaiting authorization into Finance. Once a payroll has been authorized into Finance, it cannot be rolled back.

Select Transaction

☐ Pre-Processing
 ☐ Processing
 ☒ Rollback ✓
 ☐ Authorization
 ☐ Cheque Payments (Personnel without bank details)
 ☐ Payslip Inquiry
 ☐ Email Payslips
 ☐ Reports

Next ✓

>>

Previous

Payroll Period Progress

MANAGERS PAYROLL

MANAGEMENT STAFF PAYROLL

OTHER STAFF PAYROLL ✓

Payroll Periods

Roll Back ✓

View ▾

Detach

Year	Sequence No	Payslip Date	Processed Date	Payment Date	Start Date	End Date	Status
2017	9	25-Sep-2017 ✓	25-Sep-2017	25-Sep-2017	01-Sep-2017	30-Sep-2017	PROCESSED

Rows Selected 1 Columns Hidden 1

Groups

Personnel

View ▾

Detach

Code	Name	WEF Date	Probation Period	Status
CUSTPAY	CUSTODIAN LIFE ASSURANCE LTD PAYROLL	01-Jan-1970	6	ACTIVE

Previous

Payroll Period Progress

MANAGERS PAYROLL

MANAGEMENT STAFF PAYROLL

OTHER STAFF PAYROLL

Payroll Periods

Roll Back

View ▾

Detach

Year	Sequence No	Payslip Date	Processed Date	Payment Date	Start Date	End Date	Status
No data to display.							

Columns Hidden 1

Groups

Personnel

View ▾

Detach

Code	Name	WEF Date	Probation Period	Status
CUSTPAY	CUSTODIAN LIFE ASSURANCE LTD PAYROLL	01-Jan-1970	6	ACTIVE

Information

Payroll Successfully Rolledback ✓

OK

Make corrections and start process afresh:

**Previous**

**Payroll Period Progress**

MANAGERS PAYROLL  
MANAGEMENT STAFF PAYROLL  
**OTHER STAFF PAYROLL**

**Payroll Periods**

Roll Back

View Detach

Year	Sequence No	Payslip Date	Processed Date	Payment Date	Start Date	End Date	Status
No data to display.							

Columns Hidden 1

**Groups** **Personnel**

View Detach

Code	Name	WEF Date	Probation Period	Status
CUSTPAY	CUSTODIAN LIFE ASSURANCE LTD PAYROLL	01-Jan-1970	6	ACTIVE

**Information**

Payroll Successfully Rolledback

OK

**Select Transaction**

☒ Pre-Processing ✓

☐ Processing

☐ Rollback

☐ Authorization

☐ Cheque Payments (Personnel without bank details)

☐ Payslip Inquiry

☐ Email Payslips

☐ Reports

**Next** ✓

**Previous**

**Payroll Period Progress**

**OTHER STAFF PAYROLL** ✓  
MANAGEMENT STAFF PAYROLL  
MANAGERS PAYROLL

**Payroll Periods**

Pre-Process ✓

View Detach

Year	Sequence No	Payslip Date	Processed Date	Payment Date	Start Date	End Date	Status
2017	9	✓ 25-Sep-2017	25-Sep-2017	25-Sep-2017	01-Sep-2017	30-Sep-2017	IDLE

## Authorization

This posts the processed and verified payroll figures into Finance. This should be done once all payroll numbers have been verified by stakeholders (HR and Finance). This can be achieved by running the following reports after processing payroll:

- New Pay Report
- Earnings and Deductions Listing Report



- Net Pay Listing Report
- Payroll Listing Report
- Bank Payment Listing Report (to validate personnel payment details)
- Pay Slips Listing Report
- Etc.

Select Transaction

☐ Pre-Processing
 ☐ Processing
 ☐ Rollback
 ☒ Authorization
 ☐ Cheque Payments (Personnel without bank details)
 ☐ Payslip Inquiry
 ☐ Email Payslips
 ☐ Reports

Next

Previous

Payroll Period Progress

MANAGERS PAYROLL  
MANAGEMENT STAFF PAYROLL  
OTHER STAFF PAYROLL

Payroll Periods

Authorize

View ▾

Detach

Year	Sequence No	Payslip Date	Processed Date	Payment Date	Start Date	End Date	Status
2017	9	25-Sep-2017	25-Sep-2017	25-Sep-2017	01-Sep-2017	30-Sep-2017	PROCESSED

Once authorized, the system computes the variance between payroll figures paid in the previous period, at a global scale (for all personnel) and at individual level (per personnel). Consequently, the following reports can be run to display this analysis, where variances occur:

- Net Pay Variance Report
- Pay Element Variance Report

### Pay Slip Inquiry

This allows you to query for personnel pay slips for already processed payroll periods:

**Select Transaction**

- ☐ Pre-Processing
- ☐ Processing
- ☐ Rollback
- ☐ Authorization
- ☐ Cheque Payments (Personnel without bank details)
- ☒ Payslip Inquiry
- ☐ Email Payslips
- ☐ Reports

[Next](#)

>>

[Previous](#)

**Payroll Period Payslip Inquiry**

**[Generate Payslip]**

MANAGERS PAYROLL  
MANAGEMENT STAFF PAYROLL  
OTHER STAFF PAYROLL

**Payslip Reports**

\* Criteria  [v](#)

\* Payroll  [v](#)

\* Payroll Period  [v](#)

\* Personnel  [Add Personnel](#)

Output Format  [v](#)

[Previous](#) [Cancel](#) [Generate](#)

>>

**Payslip Reports**

\* Criteria  [v](#)

\* Payroll  [v](#)

\* Payroll Period  [v](#)

\* Personnel  [Add Personnel](#)

Output Format  [v](#)

[Previous](#) [Cancel](#) [Generate](#)

>> Select Personnel

**Payslip Reports**

\* Criteria: ONE CONTRACT ▾

\* Payroll: OTHER STAFF PAYROLL ▾

\* Payroll Period: 2017-09-01 - 2017-09-30 ▾

\* Personnel:  Add Personnel ▾

Output Format: Output Format ▾

Previous Cancel Generate

**Select Personnel**

Select	Personnel
<input type="checkbox"/>	4013 MR. ABDULMUJEEB DARAMOLA
<input type="checkbox"/>	4014 MR. SUNDAY UBIBI
<input type="checkbox"/>	4009 MR. EMMANUEL AJAYI
<input type="checkbox"/>	4038 MISS. FRANCES EHIE
<input type="checkbox"/>	4024 MISS. MAMI-ZEBAH ANTHONY
<input type="checkbox"/>	4027 MR. ANTHONY ADESANYA
<input type="checkbox"/>	4028 MISS. ADEBOLA ASHADE
<input type="checkbox"/>	4012 MR. OLUREMI FADI
<input type="checkbox"/>	4010 MRS. NAOMI IRABOR
<input type="checkbox"/>	4022 MISS. CHIOMA OKPALA
<input type="checkbox"/>	4033 MR. GODWIN OGUCHE

OK Cancel

Select preferred report output format and generate the pay slip in PDF, Excel, Word, HTML etc:

**Payslip Reports**

\* Criteria: ONE CONTRACT ▾

\* Payroll: OTHER STAFF PAYROLL ▾

\* Payroll Period: 2017-09-01 - 2017-09-30 ▾

\* Personnel: 1 records selected Add Personnel ▾

Output Format: Output Format ▾

Previous Cancel Generate

### Payslip Reports

\* Criteria ONE CONTRACT

\* Payroll OTHER STAFF PAYROLL

\* Payroll Period 2017-09-01 - 2017-09-30

\* Personnel 1 records selected Add Personnel

Output Format Output Format

Previous Cancel Generate

### Opening PAYSZIP.pdf

You have chosen to open:

**PAYSZIP.pdf**  
which is: PDF file  
from: http://192.168.10.14:8005

What should Firefox do with this file?

☒ **Open with** TWINUI (default)

☐ Save File

☒ Do this automatically for files like this from now on.

Settings can be changed using the Applications tab in Firefox's Options.

OK Cancel

ALLOWANCE DETAILS		DEDUCTION DETAILS	
Dressing Allowance	21,791.67	Housing Loan Deduction	46,666.67
Furniture Allowance	37,333.33	Pension Contribution	11,247.89
Housing Allowance	46,666.67	Tax	28,099.34
Lunch Allowance	16,441.67		
Medical Allowance	17,036.95		
Telephone Allowance	14,169.79		
Transport Allowance	37,333.33		
Utility Allowance	17,266.67		
Basic Allowance	56,598.61		
Total Allowance		Total Deductions	86,013.90
Gross Pay YTD	299,521.21	Free Pay YTD	0.00
Taxable Pay YTD	211,702.41	Tax Pay YTD	28,099.34
		NET PAY	225,291.46