



JIVI SOLUTIONS SDN BHD.

# JIVI Enterprise Workforce Solutions (JIVIEWS)

Training Manual  
Employee profile

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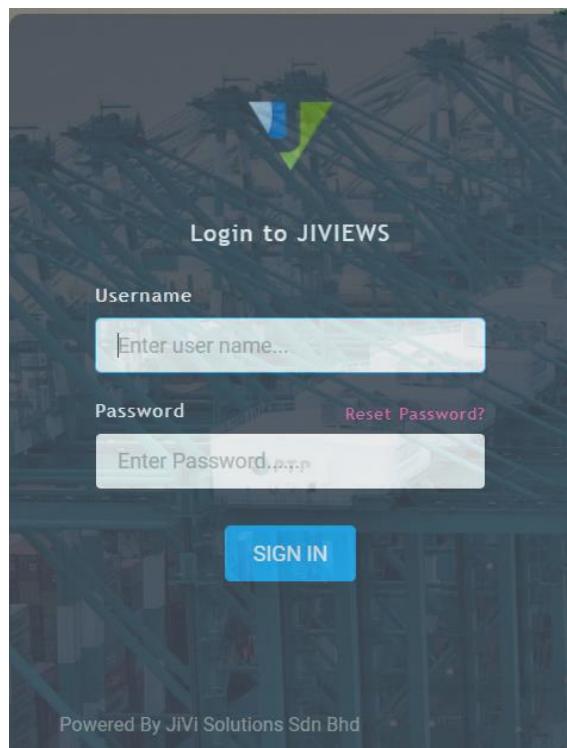
# 1 Document information

## 1.1 Document purpose

The purpose of this document is to be training the users through the various configuration settings of the system. The document will provide a mutual understanding of the module Employee Administration - Employee Profile to the users.

## 1.2 Signing up and get started

1. If you have provided your email to your employer, you should receive an email with the following credentials: URL/Username and password.
2. By using the above credentials, you can access the system. it should look like the following:
3. When you click the link in this email, you will be brought to a page where you can **Log in** with the above credentials.



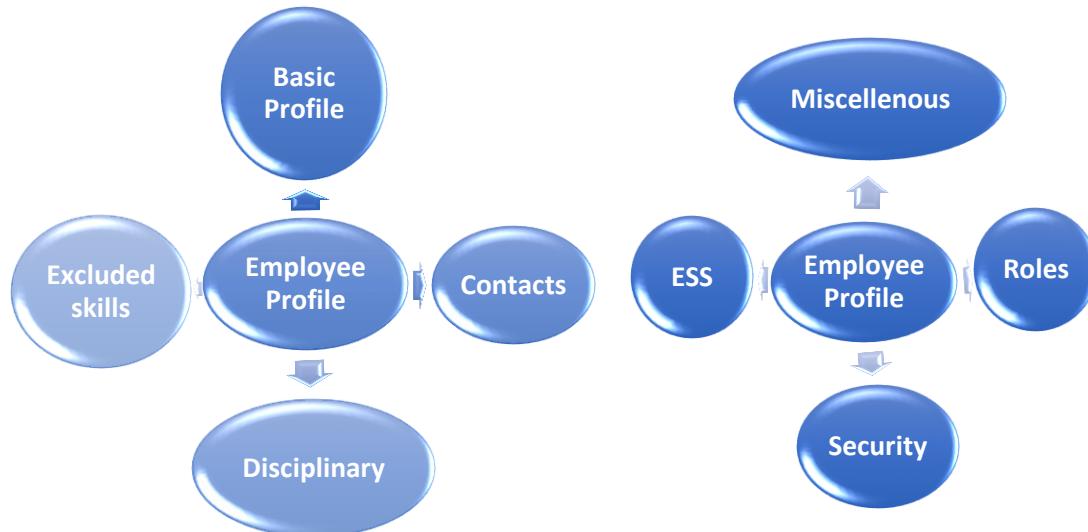
4. After login, you can enter the dashboard, and click the button to select the organization unit.

A screenshot of the JIVIEWS dashboard. At the top, there is a header with the JIVIEWS logo, a "Dashboard" title, and navigation links for "SYSTEM SETUP", "OPERATIONS", and "Admin". Below the header is a sidebar with "Main Menus" and "Organization Unit(OU)" buttons, each accompanied by an upward-pointing arrow. The "Main Menus" button has a small "Sub Menus" label with a left-pointing arrow. The main content area shows three collapsed menu items: "Access &amp; Security", "Organisation Structure", and "Process Administration".

## 1.3 How to create the Employee Profile?

### 1.3.1 Basic profile section

1. Click on this  button for selecting menus. Select the main module Employee Administration and navigate to the submodule of Employee Profile.
2. On this employee profile page, click  the button to create the following details of the employee profile information.



The screenshot shows a form interface for creating an Employee Profile. The top navigation bar includes tabs for Basic Profile, Contacts, Disciplinary, Excluded Skills, Roles, Security, ESS, and Miscellaneous. The main form area contains the following fields:

Employee Number	Badge Number
Employee Number	Badge Number
First Name	Middle Name
First Name	Middle Name
Last Name	Display Name
Last Name	Display Name
Date Of Birth	Employment Basis
Date Of Birth dd-mm-yyyy	Select Employment Basis
Gender	Marital Status
Select Gender	Select Marital Status
Title	Religion
Select Title	Select Religion
Address 1	Address 2
Address 1	Address 2
Address 3	Post Code
Address 3	Post Code
City	State
City	State
Country	Mobile Phone Number
Select Country	Mobile Phone Number
Home Phone Number	Email Address
Home Phone Number	Email Address

Buttons for saving (blue) and canceling (red) are located at the top right of the form area.

Organization Name	Roster Group
TEST	Roster Group Description
Hired Date	Probation Expiry Date
13-04-2022	Probation Expiry Date
Position	Termination Date
Select Position	Termination Date
Hourly Rate	Contracted Hours
Hourly Rate	Contracted Hours
Schedule Rule	Pay Group
Select Schedule Rule Description	Select Pay Group Description
Overtime Settings	
Select Overtime Name	<input checked="" type="checkbox"/> IsActive?

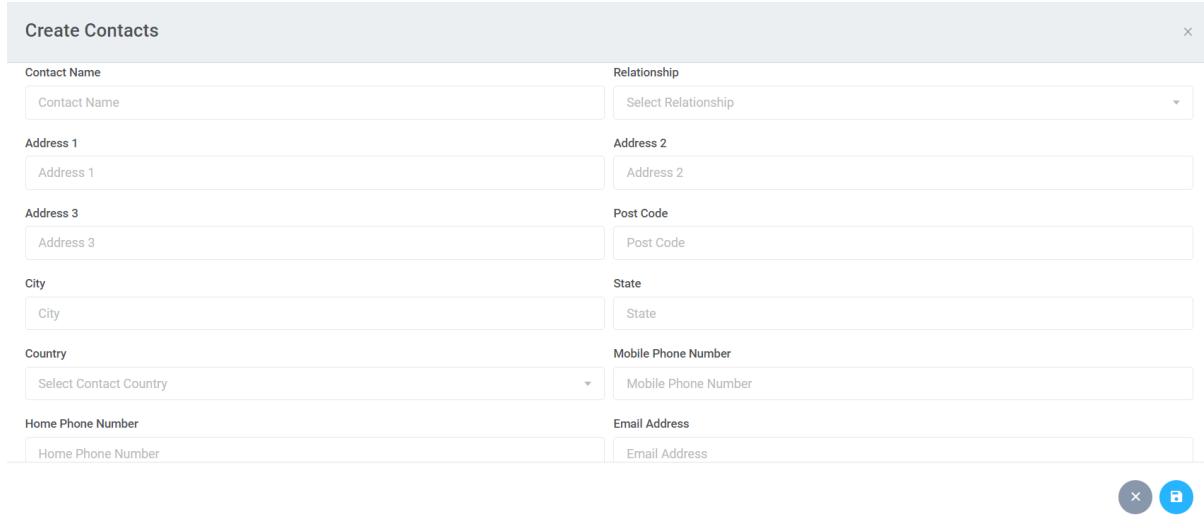
3. In a basic profile, a section fills the basic details like:

- Employee number/badge number/first /middle /last name/display name/Date of birth/Employment basis.
- Basic details include gender/marital status/title/religion/address/post code/city/country/phone number and email address/ Hired date/Probation expiry date/Position/termination date/Hourly rate/contracted hours.
- It also covers some key details including the Organization Name-The employee belongs to the organization unit can be displayed
- Roster Group seems as a greyed out after creating a roster group it can be displayed
- Schedule rule-Schedule Creation Rule is the setting up of rules that the system should validate when the employee is scheduling a workload
- Pay group -Pay Groups are the grouping of employees for payroll processing purposes.
- Overtime Settings-Overtime settings include the rules that determine after how many hours overtime starts for an employee. Overtime settings will be assigned to each employee when they are added to the system. Overtime settings are not mandatory.

4. After entering all the details click  save button to save all the details of the basic profile.

### 1.3.2 Contacts Section

1. Click  button in the contacts section to create the following details in the contacts section of the employee profile.



The screenshot shows a 'Create Contacts' form with various input fields and dropdown menus. The fields include: Contact Name, Relationship (with a dropdown menu 'Select Relationship'), Address 1, Address 2, Address 3, Post Code, City, State, Country (with a dropdown menu 'Select Contact Country'), Mobile Phone Number, Home Phone Number, and Email Address. At the bottom right of the form are two buttons: a grey 'X' button and a blue '+' button.

2. In the contacts, section fills the basic details including:
  - Contacts name/relationship/address
  - Postcode/city/state/country
  - Mobile/home phone number/email address
3. Fill in all the details and click  the button to save the contacts details in the employee profile.

### 1.3.3 Disciplinary section

This section covers the period that an employee has been suspended or terminated

#### 1.3.3.1 Suspension details

- Suspension refers to an HR-related action in which the employee is sent home from work for a specific period, usually without pay, as a form of disciplinary measure.
1. Click on the disciplinary section and navigate  create button to update the suspension details of an employee in the employee profile.
  2. Enter the start date and end date and remarks of the suspension details of an employee.

Add Suspension Details

Start Date	End Date
<input type="text"/>	<input type="text"/>
Remarks	
<input type="text"/>	

X Save

3. Fill in all the details and click  the save button to save all the details in the employee profile

#### 1.3.3.2 Termination details

- An employee may be terminated from a job of their own free will or following a decision made by the employer.
- Click on the disciplinary section to update the termination details of an employee in the employee profile. Enter the termination date and remarks of an employee.

Termination Details

Termination Date
<input type="text"/>
Remarks
<input type="text"/>

2. Fill in all the details and click  the button to save all the details in the employee profile

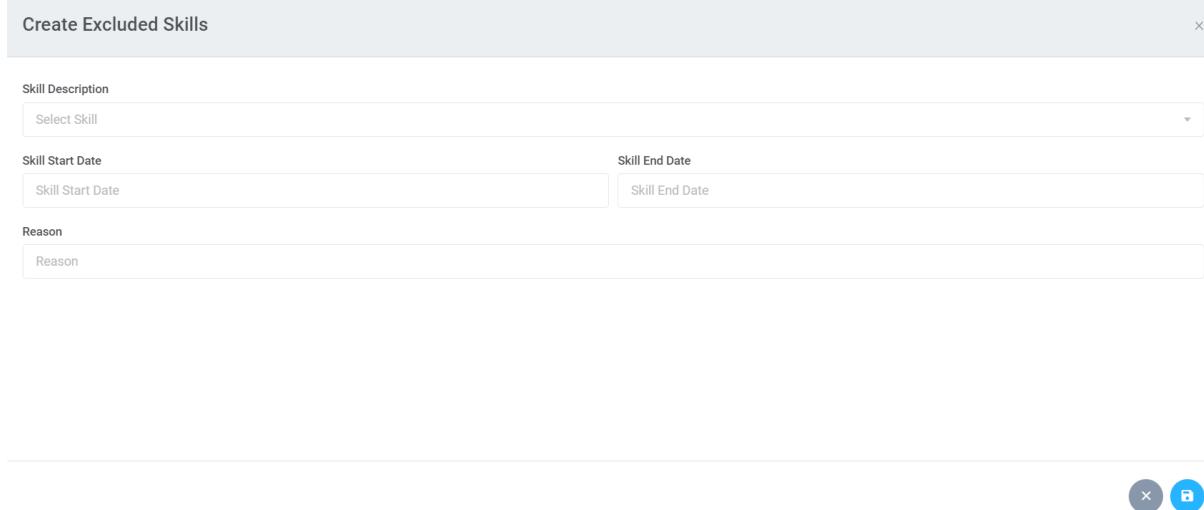
#### 1.3.4 Excluded Skills

- When an employee is unable to drive for a specific period, this section allows a user to specify to the system to not assign any workload related to driving for this employee

- Click on the Excluded Skills section to update the Excluded Skills of an employee in the employee profile.

<input type="checkbox"/>	Skill Code	Skill Start Date	Skill End Date	Reason	IsActive?	
No data available in table						

2. click on the  button to create the Excluded skills of the employee. "Create Excluded Skills" Popup will be displayed.



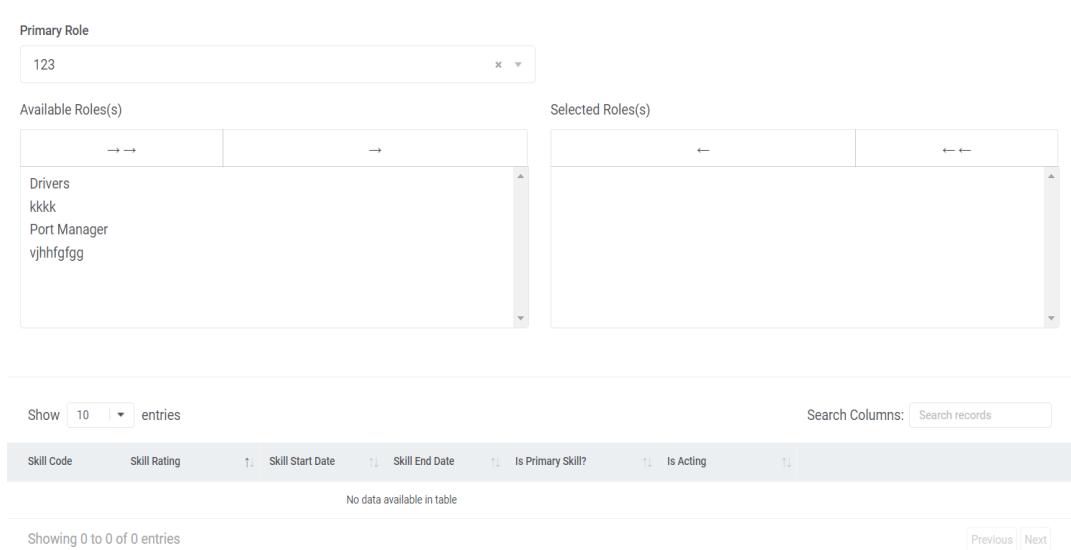
The screenshot shows a modal window titled "Create Excluded Skills". It contains three input fields: "Skill Description" (with a dropdown menu showing "Select Skill"), "Skill Start Date" (with a dropdown menu showing "Skill Start Date"), and "Skill End Date" (with a dropdown menu showing "Skill End Date"). Below these is a "Reason" field containing the text "Reason". At the bottom right of the modal are two buttons: a close button (X) and a save button (blue circle with a white checkmark).

3. Enter the Skill Description, Skill Start Date, and End date of an employee to the system to not assign any workload related to Excluded Skills. Add the remarks

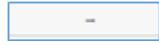
4. Fill in all the details and click  the save button to save all the details in the employee profile.

### 1.3.5 Role's section

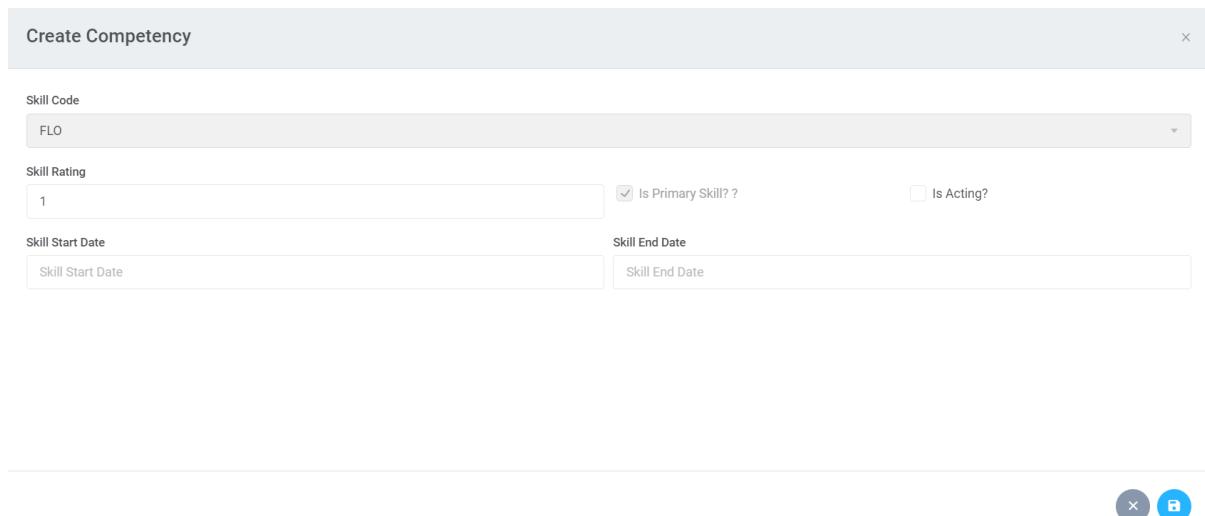
1. Click on the Roles section to update the Roles of an employee in the employee profile.



The screenshot shows a "Primary Role" field containing "123". Below it are two tables: "Available Roles(s)" and "Selected Roles(s)". The "Available Roles(s)" table lists "Drivers", "kkkk", "Port Manager", and "vjjhfgfgg". The "Selected Roles(s)" table is currently empty. At the bottom, there are pagination controls ("Show 10 entries", "Search Columns: Search records"), a table header with columns "Skill Code", "Skill Rating", "Skill Start Date", "Skill End Date", "Is Primary Skill?", "Is Acting", and a note "No data available in table". The footer shows "Showing 0 to 0 of 0 entries" and navigation buttons "Previous" and "Next".

2. Select the Primary Role name from drop-down values and select the Secondary Role other than the primary roles of an employee.
3.  (Single right arrow)-This button is used to move a single role from the Available role(s) list to the Selected Role(s) list. You can press the "control" button to select multiple roles and click on this button to move the selected values of the roles

4.  (Double right arrow)-This button is used to move all roles from the Available Role(s) list to the Selected Role(s)
5. The same procedure follows when we move from selected roles to available roles.
6. Clicking on the Edit button  for the skill will open the “Create Competency” modal shown in the below image. When a primary role is selected, the skills of the roles are automatically loaded by the system, while when secondary roles are added, the skills will be added.



Create Competency

Skill Code  
FLO

Skill Rating  
1

Is Primary Skill?  Is Acting?

Skill Start Date

Skill End Date

X Save Cancel

7. Fill in all the details and click  the button to save all the details in the employee profile.

### 1.3.6 Security

In JIVIEWS the key business functions in an organization are often divided into organization units to streamline processes and maximize efficiency

#### 1.3.6.1 Shared Employee Organizations Unit

Shared Employee Organization Units				
Organization Name	Start Date	End Date	Is Primary OU	Is Active?
TEST	30-03-2022		✓	✓

1. Click on the  button to create the shared Employee Organizations unit.
2. Select the Organization name from the drop-down values and enter the start and end date for the organization name.
3. Fill in all the details and click  the button to save all the details in the employee profile.

### 1.3.6.2 User Security Role

- Security role represents a certain level of authorization and includes the set of actions that an employee can perform in the target organization unit



User Security Role	
Security Role	Organization Unit
Employee	TEST

1. Click on the Edit button to update the Security role and Organization unit of an employee in the Employee profile.

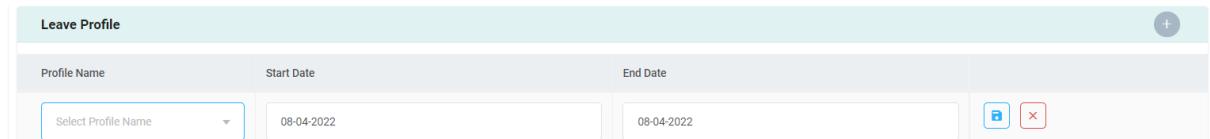
2. Fill in all the details and click  the button to save all the details in the employee profile.

### 1.3.7 ESS

- Employee self-service (ESS) is how employees can access HR (human resources)-related information and software directly through a JIVIEWS web portal.

#### 1.3.7.1 Leave Profile

In the JIVIEWS ESS entitlement system task process the leave entitlement calculation is based on the associated leave profile.



Profile Name	Start Date	End Date
Select Profile Name	08-04-2022	08-04-2022

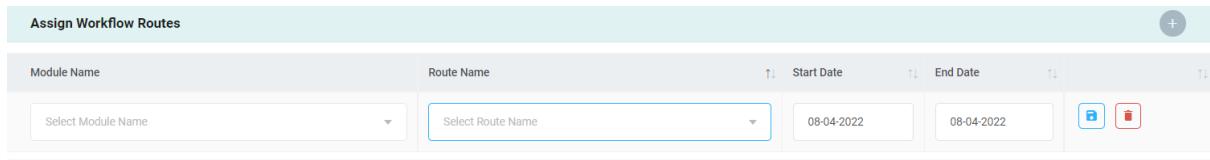
1. Click on the  button to create the Leave Profile for an employee

2. Select the Profile name from the drop-down values and enter the start and end date for the Profile name.

3. Fill in all the details and click  the save button to save all the details in the employee profile.

#### 1.3.7.2 Assign Workflow Route

- A workflow defines an authorization from all approval parties to go ahead with the changes requested happened in employee organizational Data



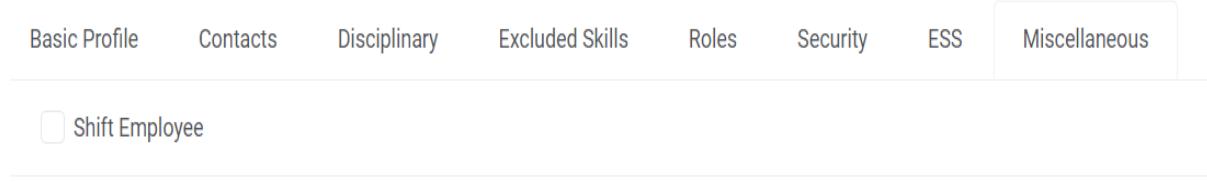
Module Name	Route Name	Start Date	End Date
Select Module Name	Select Route Name	08-04-2022	08-04-2022

1. Click on the  button to create the Assign Workflow Route for an employee

2. Select the Module name from the drop-down values (created in the Approval Routing Definition of System Definition) and enter the start and end date for the Profile name.

3. Fill in all the details and click  the save button to save all the details in the employee profile.

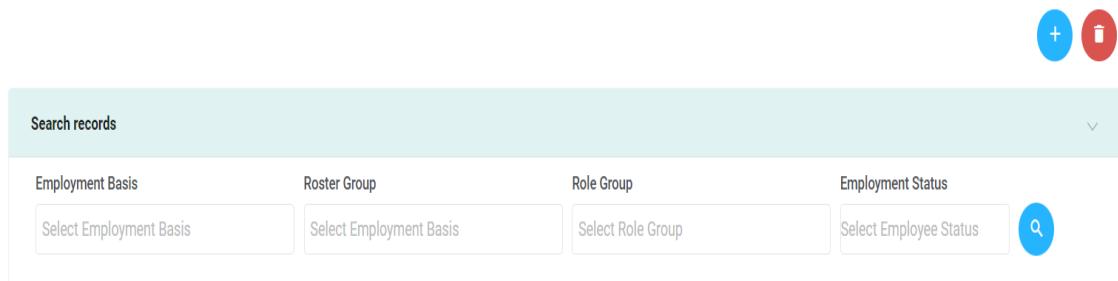
### 1.3.8 Miscellaneous



This section is used to add supplementary information about the employee in the employee profile.

## 1.4 How to use search records in the employee profile?

With hundreds of employees, it can be an overhead to find a particular entry. A powerful search of JIVIEWS allows you to find an entry in the employee profile based on the following criteria:



Search records

Employment Basis	Roster Group	Role Group	Employment Status
Select Employment Basis	Select Employment Basis	Select Role Group	Select Employee Status

+ 

1. Employment basis: Searching with the employment basis will list out all the employees within the employee profile
2. Roster group: – Searching with the Roster group will list out all the employees within the employee profile
3. Role group: - Searching with the Role group will list out all the employees within the employee profile.
4. Employment status: Searching with the employment status will list out all the employees within the employee profile.

## 1.5 How to edit the Employee Profile?

1. After entering all the basic information in the employee profile.it will display on the listing screen of the employee profile.
2. Tap on the listing screen and click  the pencil button to open and edit each section of the employee profile.

Employee Information						
Show	10	entries	Search:			
<input type="checkbox"/>	Employee Number	First Name	Last Name	Roster Group Name	Role Name	
<input type="checkbox"/>	1001	Asha 34	N s	NG1	Port Manager	 
<input type="checkbox"/>	1003	Johnson	K		Nurse staffxxxxc	 
<input type="checkbox"/>	1004	Wilson	KS	ABC_Operation	Nurse staffxxxxc	 
<input type="checkbox"/>	1010	Alexra	sollen	NG1	Drivers	 
<input type="checkbox"/>	1115	AAA	SS	NG1	Drivers	 
<input type="checkbox"/>	333DED	TYUN	VBN		Drivers	 
<input type="checkbox"/>	345	aa	aa	SSSS	Drivers	 
<input type="checkbox"/>	aa	aa	aa	SSSS	Drivers	 
<input type="checkbox"/>	N1013	Leander	Peas	SSSS	Drivers	 

Showing 1 to 9 of 9 entries

Previous  Next

## 1.6 How to delete the employee profile?

- The employee can be deleted by selecting the button  in any row of employee information on the listing screen.



- Click  button to delete the employee details on the employee profile listing page.

Employee Information						
Show	10	entries	Search:			
<input type="checkbox"/>	Employee Number	First Name	Last Name	Roster Group Name	Role Name	
<input type="checkbox"/>	1001	Asha 34	N s	NG1	Port Manager	 
<input type="checkbox"/>	1003	Johnson	K		Nurse staffxxxxc	 
<input checked="" type="checkbox"/>	1004	Wilson	KS	ABC_Operation	Nurse staffxxxxc	 
<input type="checkbox"/>	1010	Alexra	sollen	NG1	Drivers	 
<input type="checkbox"/>	1115	AAA	SS	NG1	Drivers	 
<input type="checkbox"/>	333DED	TYUN	VBN		Drivers	 

Are you sure you want to delete selected Employee Profile?

**Yes**

**No**

- After selecting the delete button the system will display are you sure you want to delete the selected employee profile? Tap yes, the employee details can be deleted.