



JIVI SOLUTIONS SDN BHD.

# JIVI Enterprise Workforce Solutions (JIVIEWS)

Training Manual  
Employee profile

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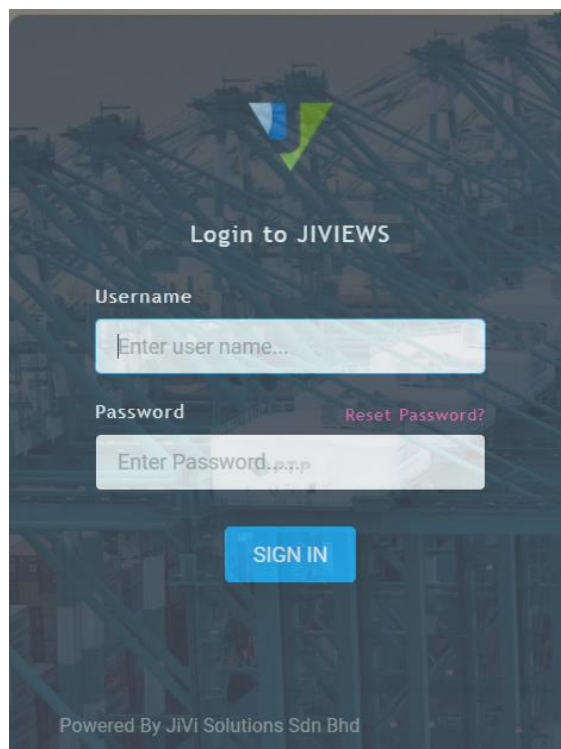
# 1 Document information


## 1.1 Document purpose

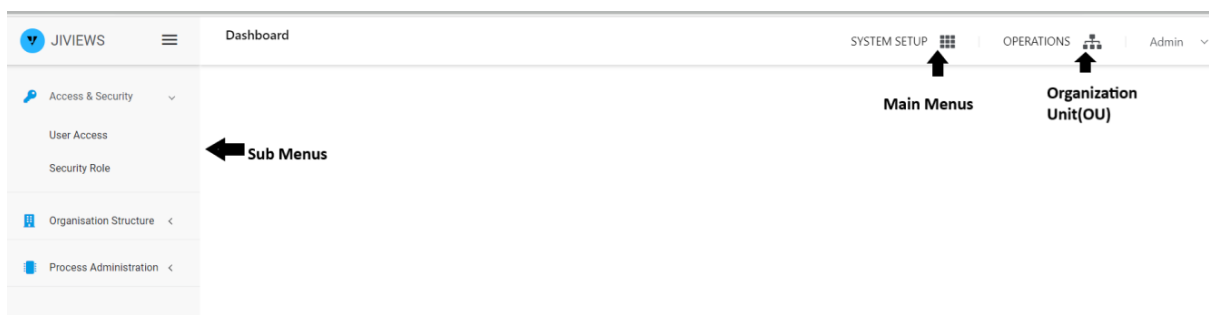
The purpose of this document is to be training the users through the various configuration settings of the system. The document will provide a mutual understanding of the module Employee Administration - Employee Profile to the users.

## 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.





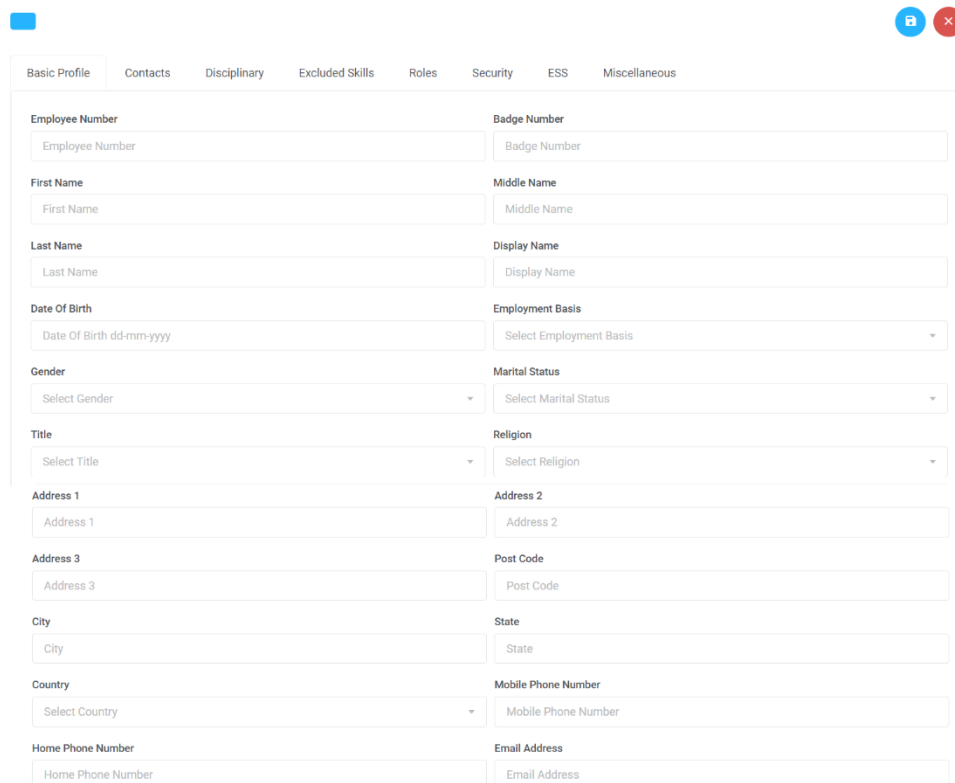
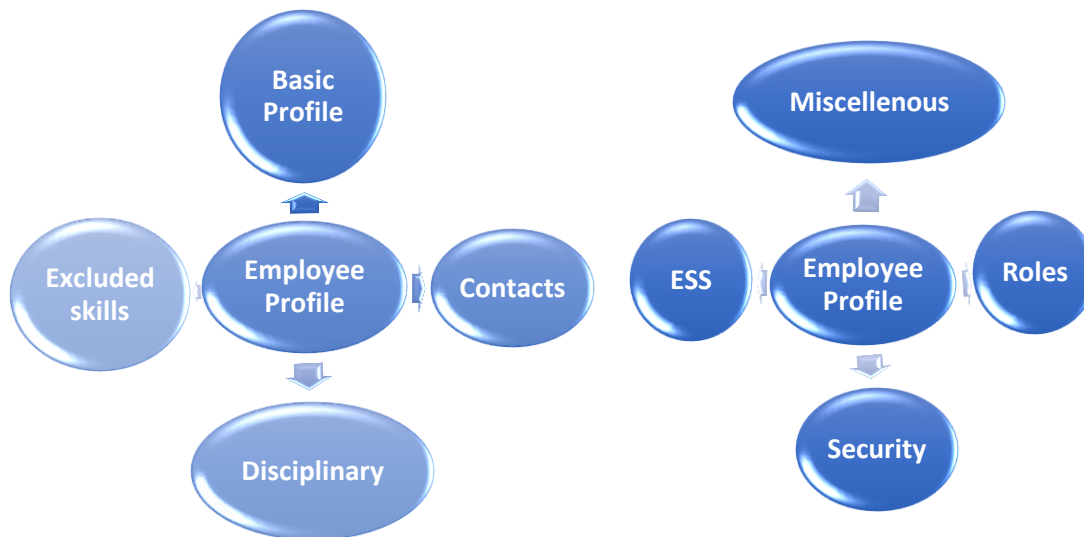
4. After login, you can enter the dashboard, and click  the button to select the organization unit.



## 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 the 'Employee Profile' form with the following fields:

- Employee Number**: Text input field.
- Badge Number**: Text input field.
- First Name**: Text input field.
- Middle Name**: Text input field.
- Last Name**: Text input field.
- Display Name**: Text input field.
- Date Of Birth**: Text input field (format: dd-mm-yyyy).
- Employment Basis**: Dropdown menu (Select Employment Basis).
- Gender**: Dropdown menu (Select Gender).
- Marital Status**: Dropdown menu (Select Marital Status).
- Title**: Dropdown menu (Select Title).
- Religion**: Dropdown menu (Select Religion).
- Address 1**: Text input field.
- Address 2**: Text input field.
- Address 3**: Text input field.
- Post Code**: Text input field.
- City**: Text input field.
- State**: Text input field.
- Country**: Dropdown menu (Select Country).
- Mobile Phone Number**: Text input field.
- Home Phone Number**: Text input field.
- Email Address**: Text input field.

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

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.

Create Contacts

Contact Name

Contact Name

Relationship

Select Relationship

Address 1

Address 1

Address 2

Address 2

Address 3

Address 3

Post Code

Post Code

City

City

State

State

Country

Select Contact Country

Mobile Phone Number

Mobile Phone Number

Home Phone Number


Home Phone Number

Email Address

Email Address

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

Start Date

End Date

Remarks

Remarks

- 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

☐ Termination Date

Remarks

Remarks


- 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.

	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.

Create Excluded Skills

Skill Description

Select Skill

Skill Start Date

Skill End Date


Reason

Reason

×

+

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.

Primary Role

123

Available Roles(s)

→ →

→

Drivers

kkkk

Port Manager

vjhfhfgg

Selected Roles(s)

←

← ←

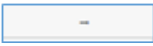
Show 10 entries

Search Columns: Search records



Skill Code	Skill Rating	Skill Start Date	Skill End Date	Is Primary Skill?	Is Acting
No data available in table					

Showing 0 to 0 of 0 entries

Previous 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 Start Date

**Skill End Date**

Skill End Date



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 <span style="float: right;">+</span>					
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.

Leave Profile			
Profile Name	Start Date	End Date	
<input type="text" value="Select Profile Name"/>	<input type="text" value="08-04-2022"/>	<input type="text" value="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

Assign Workflow Routes				
Module Name	Route Name	Start Date	End Date	
<input type="text" value="Select Module Name"/>	<input type="text" value="Select Route Name"/>	<input type="text" value="08-04-2022"/>	<input type="text" value="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

Basic Profile   Contacts   Disciplinary   Excluded Skills   Roles   Security   ESS   Miscellaneous

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☐ Shift Employee

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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

Select Employment Basis

Roster Group


Select Employment Basis

Role Group

Select Role Group


Employment Status

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.



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 1 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.













 

Search records

Employment Basis Roster Group Role Group

Select Employment Basis Select Roster Group Select Role Group 

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?

- 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.