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BIPO HRMS

Personnel Module

User Guide

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Version 2.0

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Important Notice

The information contained in this document is strictly confidential. The unauthorized use, disclosure, copying, alteration, or distribution of this document is strictly prohibited.

Version Control

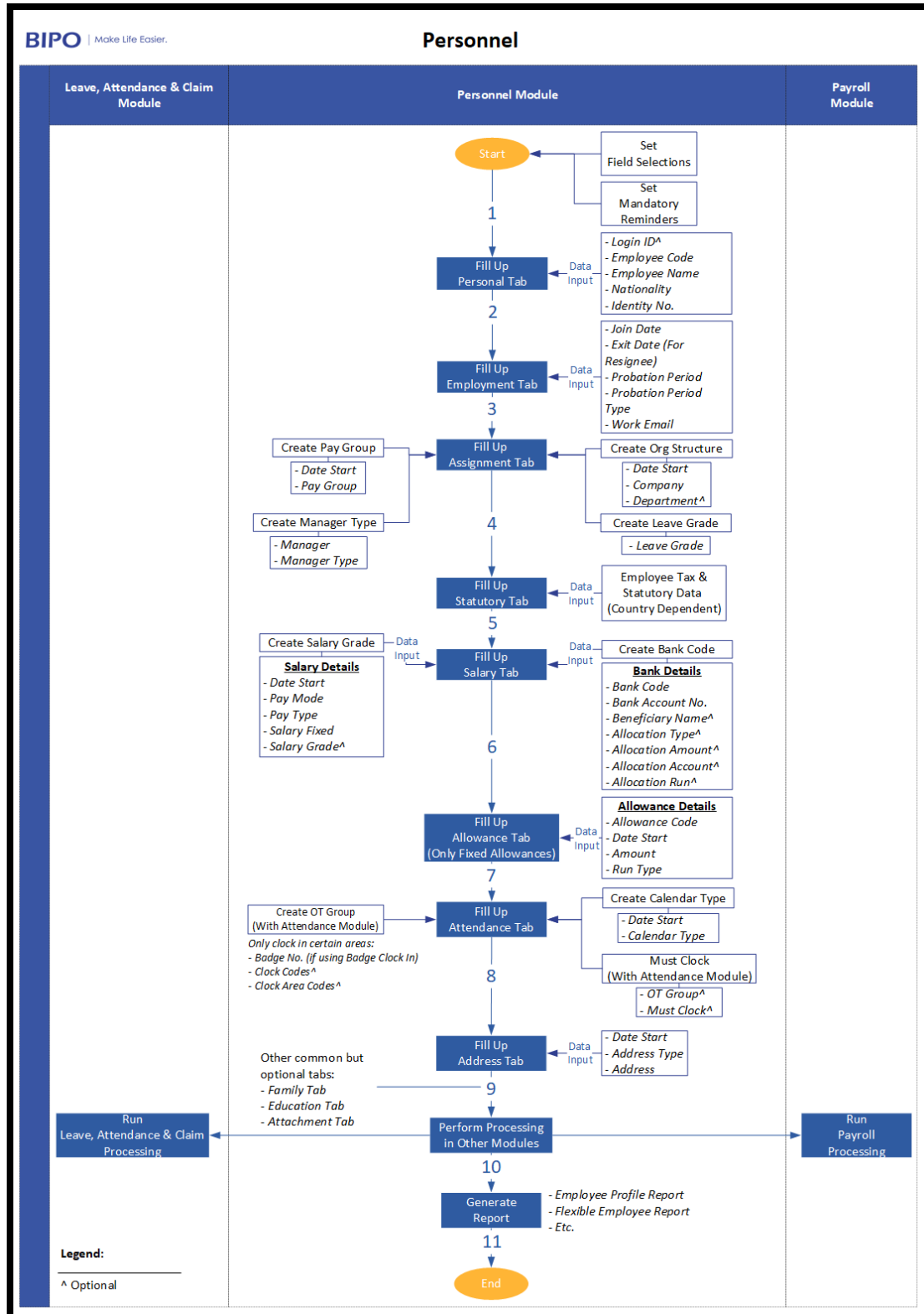
The history and reasons for the changes in this version of this document is as follow:

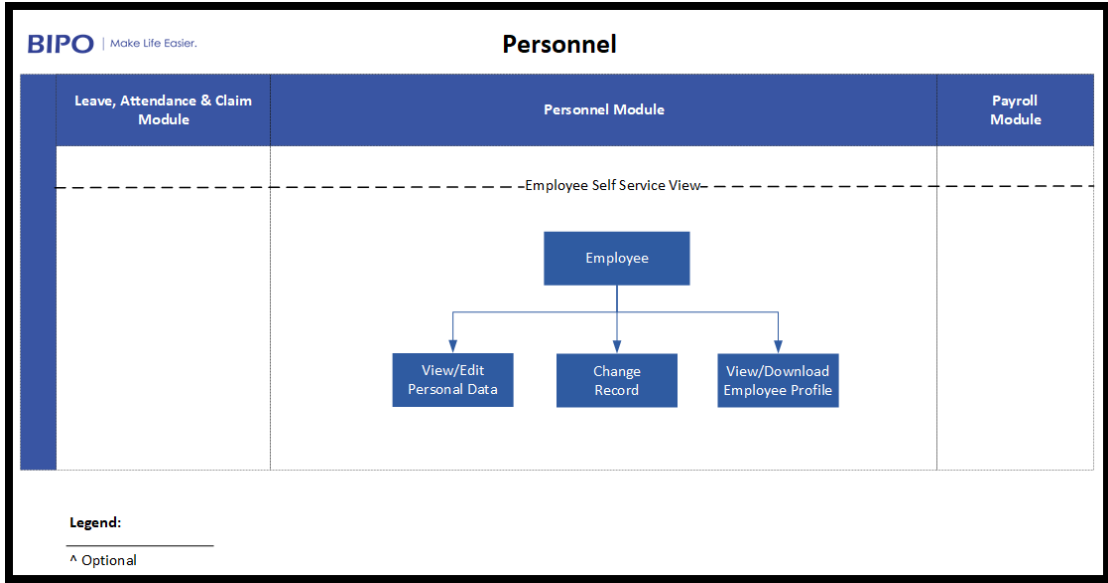
Version	Date	Author	Change Description
1.0	04 Jan 2023	Alex Chow	Enhancement 2021
2.0	16 May 2023	Sunny Chew Claude Bonares	Enhancement 2022

Where significant changes are made to this document, the version number will be incremented by 1.0.

Where changes are made for clarity and reading ease only and no change is made to the meaning or intention of this document, the version number will be increased by 0.1.

Personnel Flow Chart





Browse Employee

Browse Employee is used to pull up stored employee information in the system to be generated in an excel file. User can choose from an existing created template from the drop-down list or create a new one based on preferred columns to display or arrangement.

Access: Personnel Module > Personnel > Browse Employee

The screenshot shows the 'Browse Employee' interface with the following data table:

Employee Code	Employee Name	Email	Designation	Salary Gross	Salary Fixed	Country	Country Name	Pay Group
1	Employee 1 1	1@biposervice.com	ACC_REP	2000.00	1000.00	PH	Philippines	PH-Semi
ABC101	A Employee	@bipose	Director	30000.00	30000.00	PH	Philippines	PH-Semi
DJ001	Do			90000.00	90000.00	PH	Philippines	
EmployeeD	Employee D Item 66	EmployeeD@biposen	None	362539.00	362539.00	PH	Philippines	PH-MON2
EmployeeE	Employee E - Semi Item 66-Tax Balancing	EmployeeE@biposen	None	362539.00	362539.00	PH	Philippines	PH-SEMI2

System can also limit the date of employee information to appear in the report using “As At Date”. While “Filter” option can limit the report to:

- All – all employees including resignees
- Existing – only active employees
- Resignees – resignees

Template

Template is used to customise the columns to appear in the report. The “Default” template is provided to generate basic information with the given columns. Clicking the drop-down will show the list of created templates.

The screenshot shows the 'Browse Employee' interface with the 'Template' dropdown menu open, displaying the following options:

- Default
- Employee Listing
- TH Employee Listing

The list of created templates available are those that you:

- Created by yourself
- Distributed to you by another user

Creating a Template

User can create their own template according to their specification of columns. Below is a sample that will serve as a guide:


Sample: Create a template that consists of:

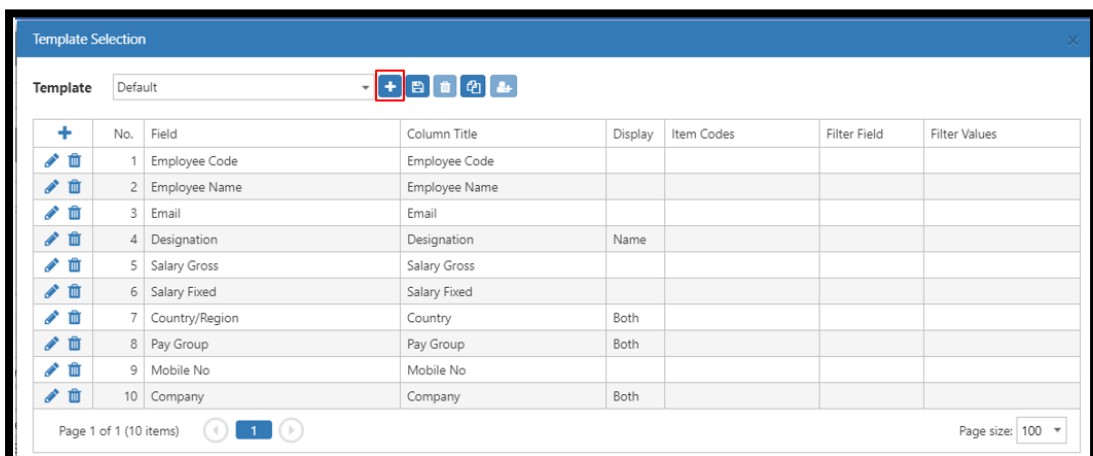
- Employee Code
- Employee Name
- Designation
- Salary Fixed

Steps

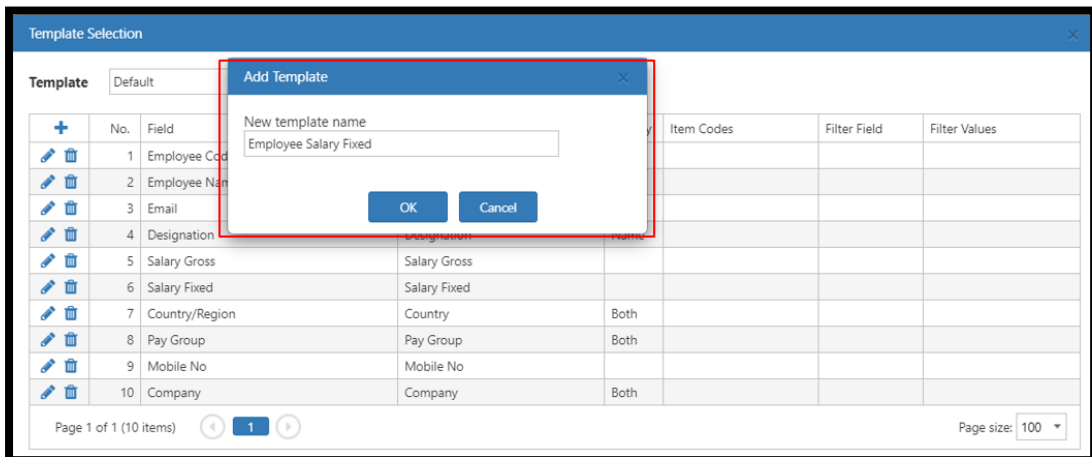
1. Click the wrench “” icon.



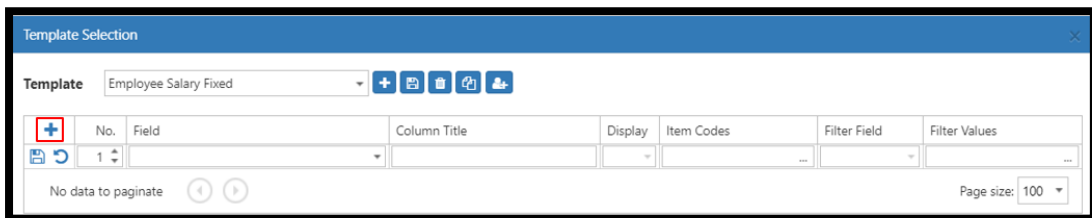
2. The related columns of created template will display. Click the add new “” icon.



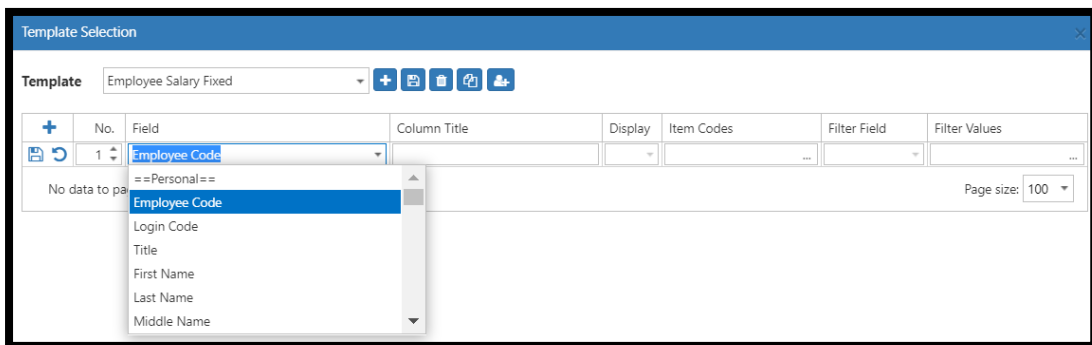
3. Enter a template name. This will serve as your reference in choosing the template once created. Hit OK button.



4. Click “ + ” icon to add a field. This will prompt the first line or item.



5. Choose the related field to from the drop-down list. In the given sample, the first item should be Employee Code.

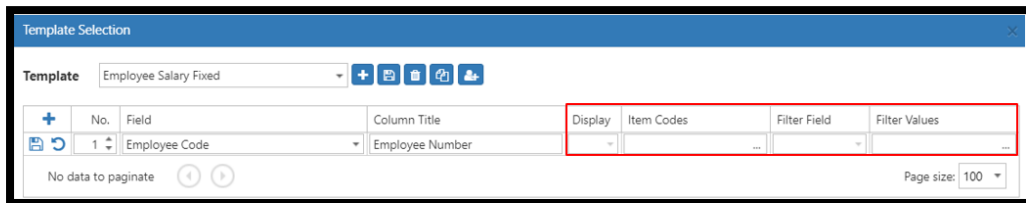


6. Column Title is a free text that will be the naming convention of header in the output excel report.

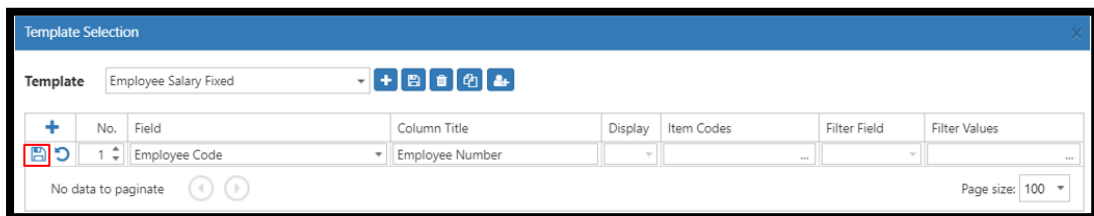
Sample: Employee Code will be the source value of Employee Number.



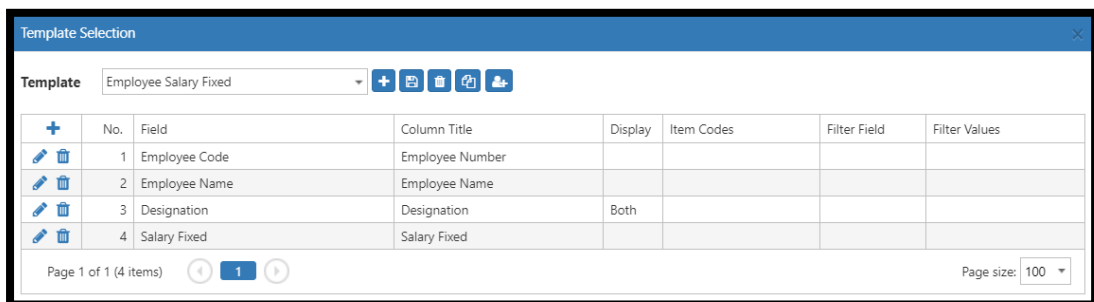
7. In this case, Display, Item Codes, Filter Field and Filter Values cannot be specified since these fields are depending on the “Field” column user have chosen. These fields are only necessary if this is applicable to the “Field” specified.



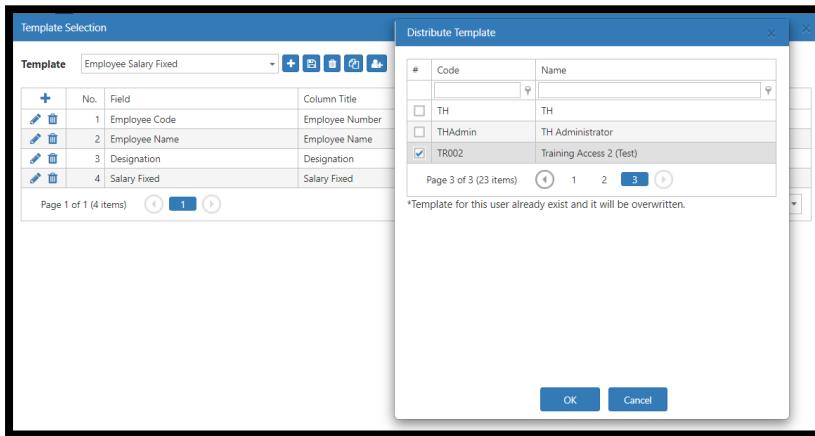
8. Click the diskette icon to save.



9. Repeat steps 4 to 8 to add Employee Name, Designation and Salary Fixed Fields.



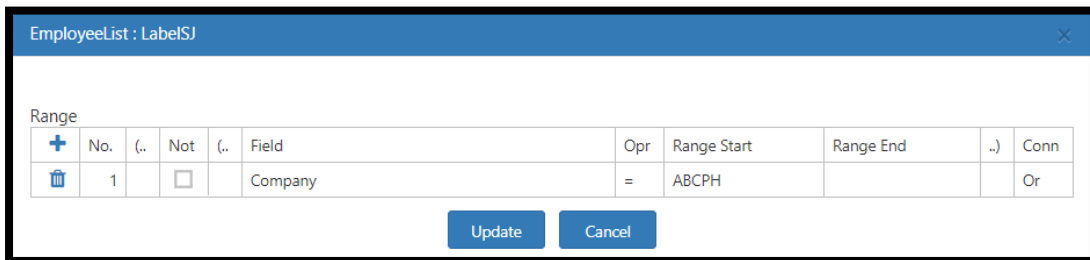
10. User can share the created template to another user by clicking the “Distribute” button. This will prompt the list of existing users and must be selected via checkbox for appropriate recipient of the template.



Note: When the recipient edits the template, it doesn't affect the original template.

11. Specify the Query to set the condition of range to be included in the report. It has a default query intended for every report. You can click on configure button "+" to add a new query or click "-" to configure the existing Query.

In the sample below, only Company ABCPH will be included in the report.



Note: When editing "Default" Query, this will affect the default template for all users.

12. Click the download button located at the upper right of the screen to generate the excel output file.




13. Sample Result:

A	B	C	D	E
Employee Number	Employee Name	Designation	Designation Name	Salary Fixed
EmployeeD	Employee D Item 66	NONE	None	362539
EmployeeE	Employee E - Semi Item 66-Tax Balancing	NONE	None	362539
Test001	KIM	MGR	Manager	10000
Test002	Jong	SNR_MGR	Senior Manager	15000
Test003	Choi	DIR	Director	80000

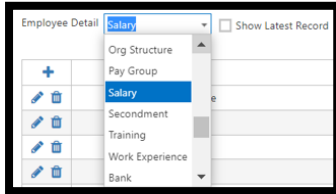
Flexible Employee Report

Access: Personnel Module > Report > Flexible Employee

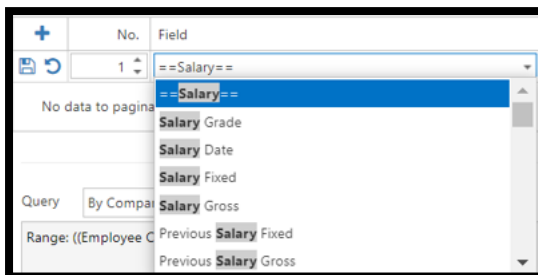
No.	Field	Column Title	Display	Width (cm)	Format	Align	B	I	Sum	Avg
1	Employee Name	Employee Name		2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Salary Date	Salary Date		2.00	dd/MM/yyyy	Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Salary Grade	Salary Grade	Both	2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Salary Fixed	Salary Fixed		2.00	#0.00	Right	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Salary Gross	Salary Gross		2.00	#0.00	Right	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1. Click  to create a new template. Enter the template name.
2. **As at Date** – The date specified will reflect the information as of the date given.
3. **Print for** - The filter allows the user to set **All**, **Existing** or **Resignees** based on the date defined.
4. **Company as report header** – Tick to enable and display in the report header.
5. **Template** – A drop-down selection of templates that have been created.
6. **Report Title** – A free-text to enter the report title that will display in the report.
7. **Paper Size** – Select between Portrait or Landscape.
8. **Report Type** – Select between:
 - Summary – Report will be presented in summarized and in grouping.
 - Detailed – Report will be presented per employee.

9. **Employee Detail** – This contains various employee detail information with historical record. For example, employee’s Pay Group, Org Structure, Salary, etc., as shown:



When the **Employee Detail** is specified, user will have the flexibility to choose those fields from the detail record selected. For example, specifying **Employee Detail = Salary**, user will be able to choose the fields from the detail **Salary Records**, as shown:



This is particularly useful if user would like to generate a report that contains historical record.

10. **Show Latest Record** – Tick to display employee’s latest record.

11. **Configure the Report Header**

- a) Click **+** to add a field.
- b) **No** is a sequence order in the report header.
- c) Select the **Field** that will be included in the report and will serve as a header.
- d) Edit **Column Title** to change the header name in the report. This is default to **Field** name.
- e) **Display** will be depending on the selected **Field**. For some **Field**, it could be greyed out while some fields can be selected to display as **Code, Name or Both**.

Example:

Flexible Employee Report

As At Date: 27/07/2021

Print For: Existing (20/12/2021)

Company as report header

Template: Default

Report Title: Employee Profile

Paper Size: Landscape

Report Type: Detailed

Employee Detail: Employee Show Latest Record

No.	Field	Column Title	Display	Width (cm)	Format	Align	B	I	Sum	Avg
1	Employee Code	Employee Code		2.00		Left	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Employee Name	Employee Name		2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Gender	Gender	Name	2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Department	Department	Both	2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

On the above screenshot, when field Department is selected to be displayed as “Both”, Code and Name will be displayed on different column when data is exported.

F	G
Department Code	Department Name
ACC	Account Department
ACC	Account Department
ACC	Account Department
ACC	Account Department
ACC	Account Department
ACC	Account Department
ACC	Account Department
ACC	Account Department
ACC	Account Department
ACC	Account Department
ACC	Account Department

- f) **Width (cm) / Format / Align / B and I** Are Used to format the column and header fields in the report.
- g) **Sum / Average** can be checked when the field is numeric. It is needed to select **Summary** in **Report Type** as it will calculate the total amount of balance.

No.	Field	Column Title	Display	Width (cm)	Format	Align	B	I	Sum	Avg
1	Employee Code	Employee Code		2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	Employee Name	Employee Name		2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	Employee Code	Employee Code	Both	2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	Login Code	Login Code		2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	Title	Title		2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	First Name	First Name		2.00	dd/MM/yyyy	Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	Last Name	Last Name		2.00	dd/MM/yyyy	Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8	Middle Name	Middle Name		2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

12. Click **Preview, Export or Spreadsheet** button to generate the report.

BIPO Service					
Flexible Employee - Salary					
01/12/2021 (Wed) 17:29:55		As At Date 01/12/2021, All Records			hrm - Page 1 of 4
Range: (Pay Group=PH-Semi)					
Employee Name	Salary Date	Salary Grade	Salary Fixed	Salary Gross	Status Change Reason
Employee 1	01/05/2019		1000.00	2000.00	
Jose.	02/01/2018		10000.00	10000.00	
A Employee	01/01/2019		30000.00	30000.00	
Jane Doe	01/09/2017		15000.00	15000.00	
Alan	01/10/2019		70000.00	70000.00	
George	05/03/2018		30735.00	30735.00	
KL PH2	19/02/2021		9090.00	9090.00	#NEW / New Entry

Exporting Flexible Report

Access: **Personnel Module > Report > Flexible Employee**

Flexible Employee Report

As At Date: Filter:

Company as report header

Template:

Report Title:

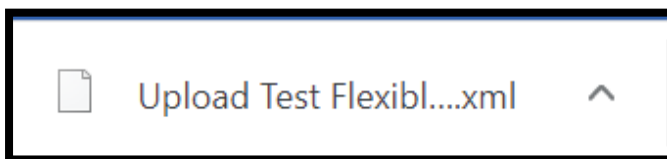
Paper Size:

Report Type:

Employee Detail: Show Latest Record

	No.	Field	Column Title	Display	Width (cm)	Format	Align	B	/	Sum	Avg
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	1	Employee Code	Employee Code		2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	2	First Name	First Name		2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	3	Last Name	Last Name		2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	4	Gender	Gender	Name	2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	5	Nationality	Nationality	Both	2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1. Click button to export an existing Flexible Employee Report.
2. Upon clicking, this will automatically download XML file. The XML file contains the Flexible Employee Report design.



Importing Flexible Report

Flexible Employee Report

As At Date: 07/28/2020 Filter: All

Company as report header

Template: Upload Test Flexible Report


Report Title:

Paper Size: -- Please select --

Report Type: -- Please select --

Employee Detail: Show Latest Record

	No.	Field	Column Title	Display	Width (cm)	Format	Align	B	/	Sum	Avg
	1	Employee Code	Employee Code		2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	2	First Name	First Name		2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	3	Last Name	Last Name		2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	4	Gender	Gender	Name	2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	5	Nationality	Nationality	Both	2.00		Left	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

1. Click  to upload flexible report into BIPO system.
2. Click BROWSE button and select the template to upload. It will now be indicated in XML file field.

Import Template

Uploaded Files: Upload Test Flexible Report.xml

Xml File: Browse

Upload

Import

3. Click the UPLOAD button.
4. Once the template is indicated in Uploaded Files field, click IMPORT button.

Import Template

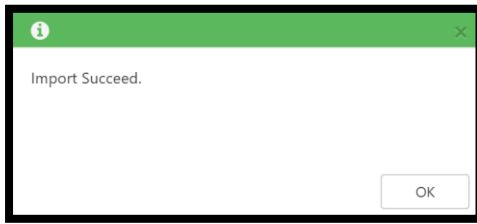
Uploaded Files: Upload Test Flexible Report.xml

Xml File: Select a file... Browse

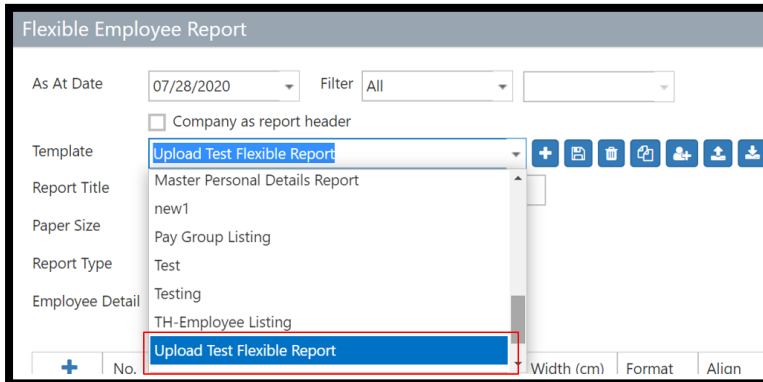
Upload

Import

5. The successful upload notification will be displayed if no error is encountered during the upload process.



6. The upload template will now be available to use under selections of template.




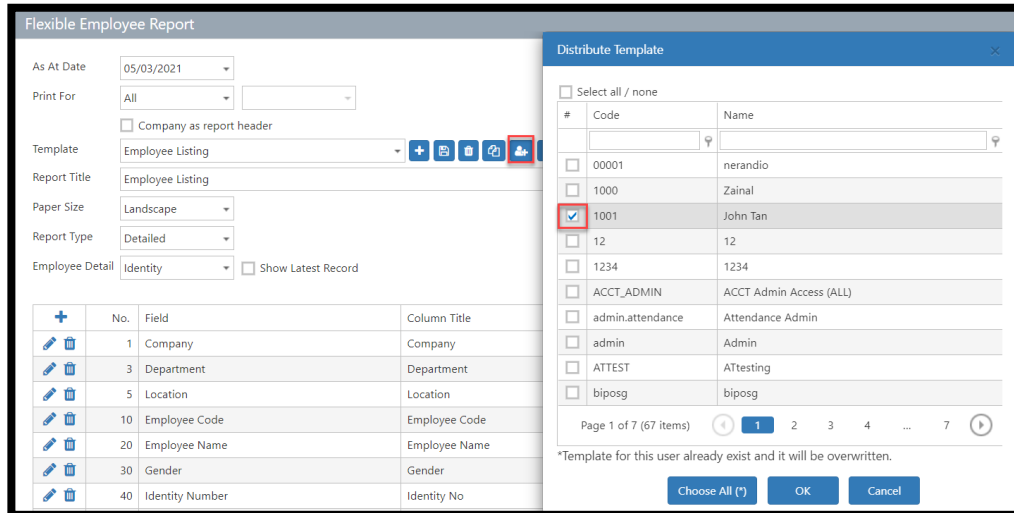
Distribute Template

User can share customised template to another user by clicking the “Distribute” button. This button can be found (and not limited to) on the following reports:

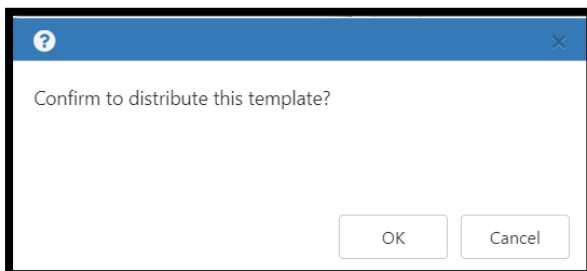
- Flexible Employee
- Flexible PE Report
- Flexible Onboarding Report
- Headcount Report
- Flexible Payroll Report
- Payroll By Group Report
- Payroll Variance Report
- Payroll Reconciliation Report
- Flexible Leave Report
- Annual Leave Balance Report

How to Distribute Customised Template

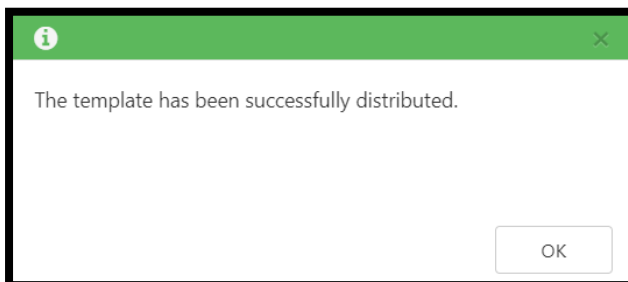
1. On the given list of reports above, User can create their own template based on the columns and other specifications that they want to reflect in the report. Once done, click the Distribute “” icon.



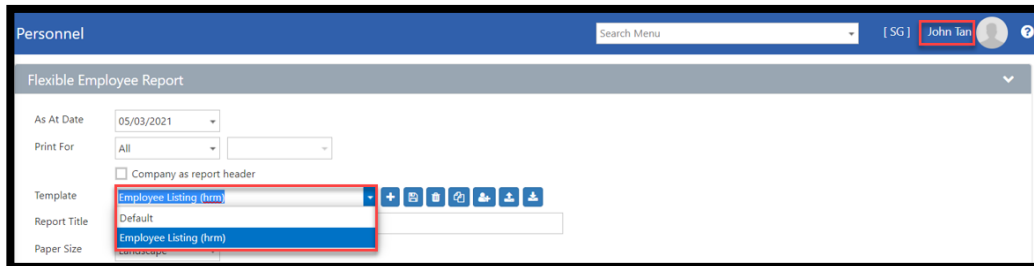
2. The list of other Users will be displayed. Tick the checkbox besides the username. You can tick multiple Users to distribute the template.
3. Click OK.
4. System will confirm before distributing the template. Click OK.



5. A confirmation will prompt for successful distribution.



- Now logged in as the other User, the Distributed Template will now be available from the drop-down list.



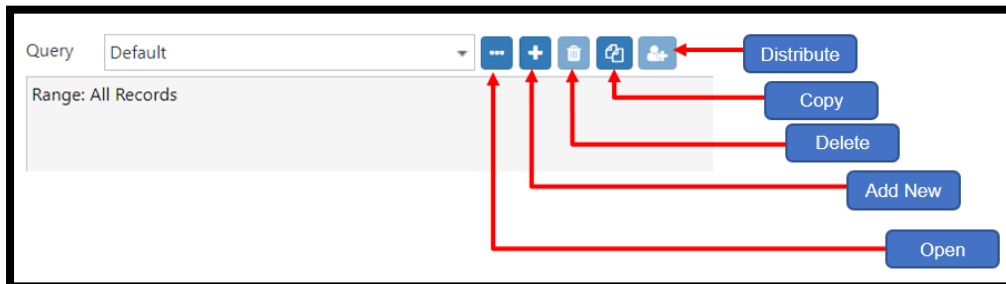
Query

Query is used to sort and set the range covered in the result of a report. Query can be found at the bottom of reports screen across different BIPO report generation. It is set to “Default” with all records will be generated. User can limit the result according to the setting of Query.

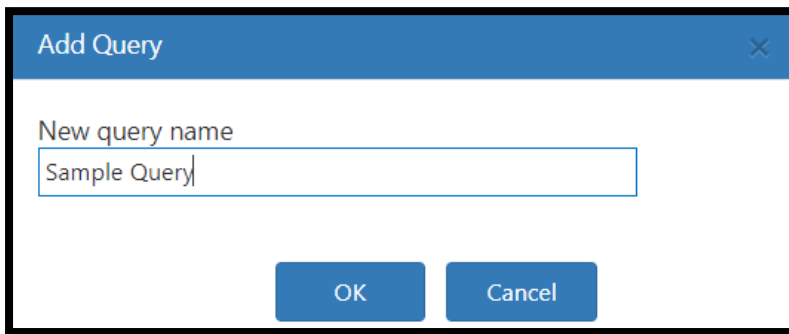
User can add customise Query and distribute to different Users.

Setting Up Query

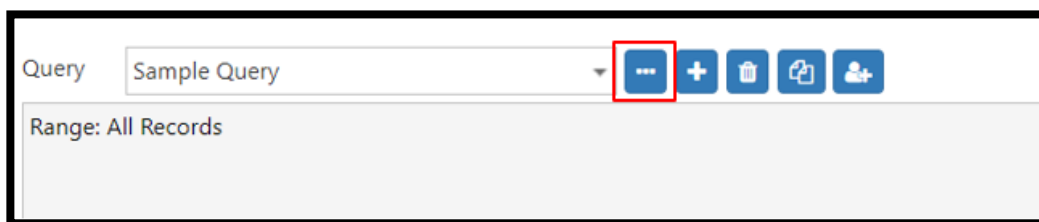
- Query is set to Default. User cannot delete or distribute default Query but can edit the values by clicking the Open “⋮” icon.



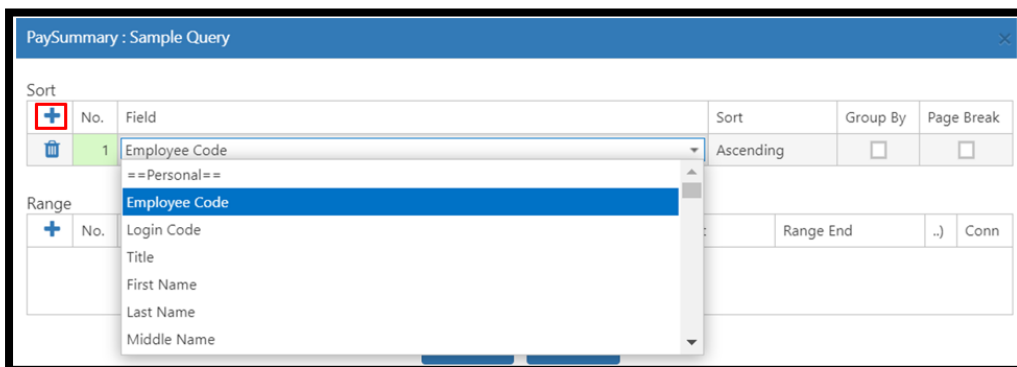
- To create a new Query, click the Add New “+” icon. This will prompt User to edit a new Query name. Click OK.



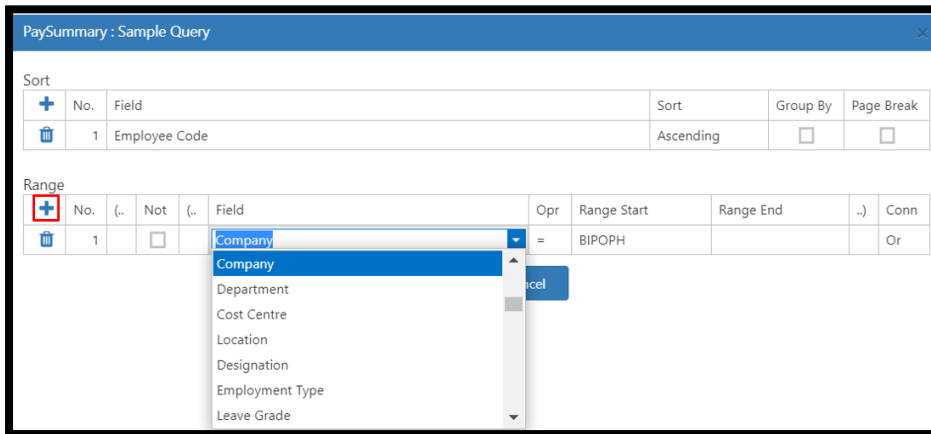
3. Click the Open “...” icon to configure the Query.



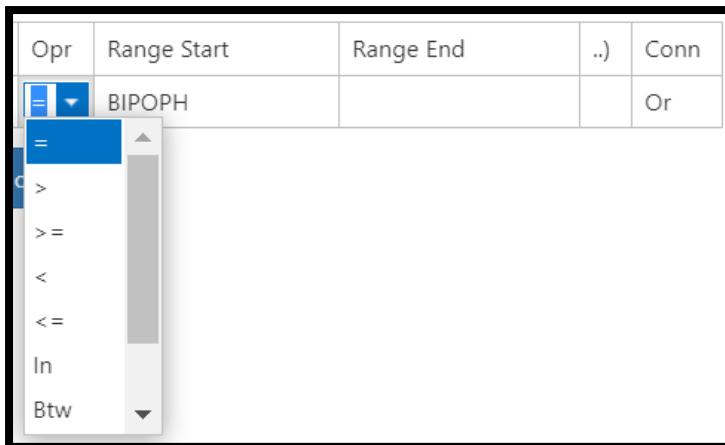
4. Click “+” icon to add a sorting criteria. Choose from the drop-down list under Field column. “No” column will follow the order sequence if having multiple sorting field.



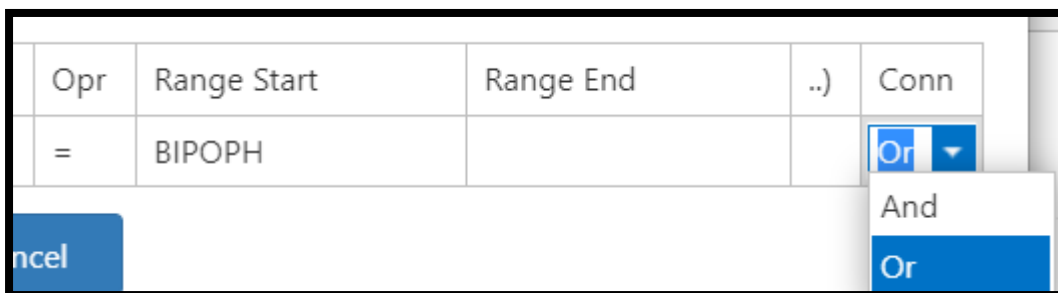
5. In limiting the range of the report, click “+” icon and choose from the drop-down list.



6. Set the correct Opr as this will be the formula from the given Range Start and Range End.



7. The Conn column is used if having multiple Range. Values given "And" and "Or"



8. Click Update.



9. The criteria set as a sample:

- Output report will be sorted in via Employee Code in Ascending order
- The report will only show company from BIPOPH

PaySummary : Sample Query

Sort					
No.	Field	Sort	Group By	Page Break	
1	Employee Code	Ascending	<input type="checkbox"/>	<input type="checkbox"/>	

Range					
No.	(. Not (. Field	Opr	Range Start	Range End	..) Conn
1	<input type="checkbox"/> Company	=	BIPOPH		Or

Query Output Report Sample

The output report will be generated according to set Query.


Pay Runs		PH2019-12-02 - 1st Half Month Dec 2019 [PHAA-Semi]		PH2019-12-03 - 2nd Half Month Dec 2019 [PHAA-Semi]	
BIPO Service					
Payroll Summary					
10/04/2019 (Fri) 06:52:02		Range: ((Company=BIPOPH))		JCB - Page 1 of 2	
Employee Code/Name	Basic Pay	Allowance	Deduction	Net Pay	Employer
Salary Gross	Total Pay				
PHAA002-M / John 45,000.00	45,000.00	22.23 N Tax Refund 1	800.00 N SS Employee 1 550.00 N PhilHealth Employee 1 100.00 N Pag-IBIG Employee 1 5,865.28 N Tax Amount 1 7,415.28 T Total Deductions 1	39,034.72 C 1 -1,427.77 N 1 37,606.95 T 1	1,600.00 SS Employee 1 30.00 EC Employer 1 550.00 PhilHealth Employer 1 100.00 Pag-IBIG Employer 1
PHAA003-M / Paul 40,000.00	40,000.00	842.47 N Tax Refund 1	800.00 N SS Employee 1 550.00 N PhilHealth Employee 1 100.00 N Pag-IBIG Employee 1 4,520.04 N Tax Amount 1 5,970.04 T Total Deductions 1	35,479.96 C 1 -607.53 N 1 34,872.43 T 1	1,600.00 SS Employee 1 30.00 EC Employer 1 550.00 PhilHealth Employer 1 100.00 Pag-IBIG Employer 1
PHAA008-SM / Melanie Grazia 42,000.00	63,000.00	3,000.00 O Meal Allowance - No Prorate (3,000.00) 1 3,000.00 O Transport Allowance (3,000.00) 1 6,000.00 T Total Allowances 1	400.00 N SS Employee 1 275.00 N PhilHealth Employee 1 50.00 N Pag-IBIG Employee 1 19,542.18 N Tax Amount 1 20,267.18 T Total Deductions 1	48,732.82 B 1	800.00 SS Employee 1 15.00 EC Employer 1 275.00 PhilHealth Employer 1 50.00 Pag-IBIG Employer 1
PHAA009 / Alvaro 50,000.00	45,000.00	502.81 N Tax Refund 1	500.00 N SS Employee 1 206.25 N PhilHealth Employee 1 50.00 N Pag-IBIG Employee 1 1,722.23 N Tax Amount 1 2,478.48 T Total Deductions 1	43,024.33 C 1	1,000.00 SS Employee 1 15.00 EC Employer 1 206.25 PhilHealth Employer 1 50.00 Pag-IBIG Employer 1

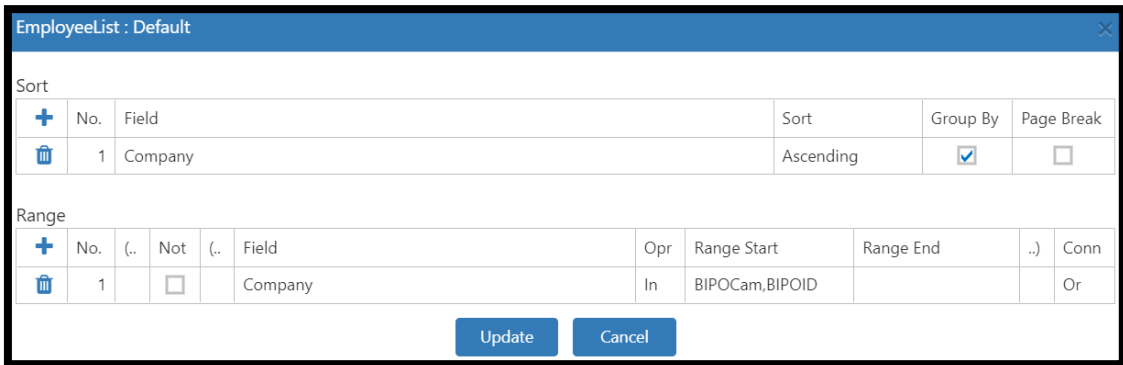
Manpower Distribution Report

Manpower Distribution Report is used to generate the number of attrition rate in Company, Department, Designation, Location, Cost Centre, etc..

Access: Personnel Module > Report > Distribution > Manpower Distribution

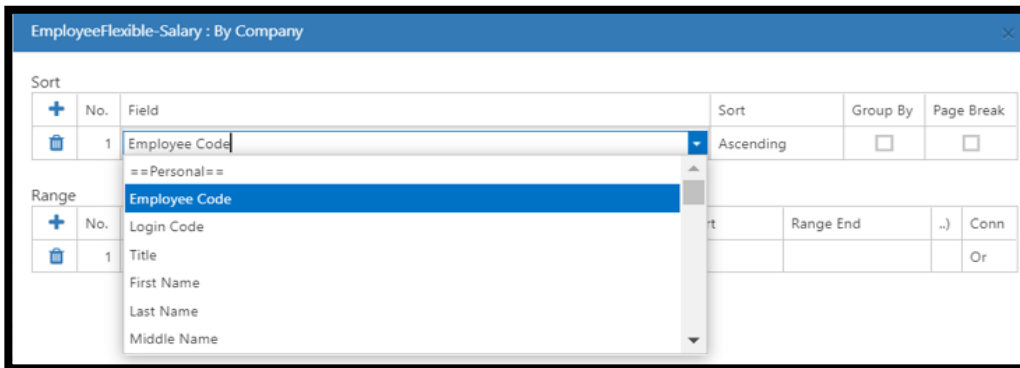
The screenshot shows the 'Manpower Distribution Report' configuration window. It features several input fields and checkboxes. The 'Period' field is set to 'Period'. The 'Attrition Rate' field is set to '-- Please select --'. The 'Date Start' and 'Date End' fields are empty. The 'Transfer Fields' field is set to 'CompanyCode'. The 'Transfer Reasons' field is set to 'PE,RSG,TransferOut,#NEW'. There are two checkboxes: 'Include resignees on last day as existing headcount' (checked) and 'Company as report header' (unchecked). Below these fields is a 'Query' field set to 'Default'. At the bottom, there are three buttons: 'Preview', 'Export', and 'Spreadsheet'.

1. **Period** – This filter allows the user to set the coverage of the report if Period, Quarterly or Yearly.
2. **Attrition Rate** – Select from *Beginning Headcount*, *Average Headcount* or *End Headcount*.
3. **Date Start, Date End / Month Start** – Specify the range of the report.
4. **Include resignees on last day as existing headcount** – Tick if the last day of employment will still tag the employee an active employee.
5. **Company as Report Header** – Tick to show company as report header in the report.
6. **Transfer Fields** – Specify the category of transfer.
7. **Transfer Reasons** – Specify the reason for transfer.
Note: *Transfer Reason* can be added in **Personnel Module > Reference > Assignment > Reasons > Type = Status Change**.
8. **Query** – It is used to set the condition of range to be included in the report. It has a *default query* intended for every report. To set a query according to your own specification, click  to add a new *Query* and enter the *Query* name.

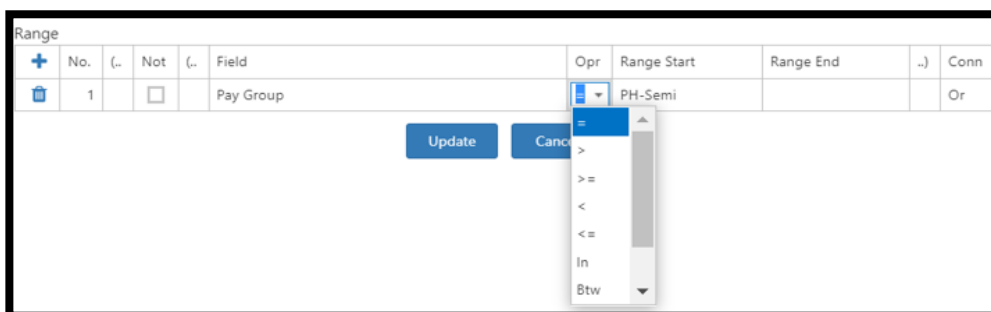


Click **+** to add a filter in **Sort** and **Range**. **No.** is the order of sequence if having multiple fields.

Select in the drop-down list of field to set how to filter employee and select the **Sort** order.



In **Range**, set **Opr** as this will be the formula from the given **Range Start** and **Range End**.



- = means can select only one value in **Range Start**
- **In** means can select several values in **Range Start**
- **Between** - means need to set value in **Range Start** and **Range End**
- **>=** - means the field must large or equal the value set in **Range Start**

- The **Conn** column is used if having multiple *Range*. Values given are *And* and *Or*, then click *Update*.
9. Click **Preview** to generate PDF report.

Beginning Headcount

Attrition Rate = Beginning Headcount

Resign %: $\frac{10 \text{ (Resignation)}}{19 \text{ (Period Start)}} * 100 = 52.6$

		Period Start	New Join	Resignation	Trans In	Trans Out	Period End	Resign %	Turnover %	Retention %
Company										
	BIPOCam / BIPO Cambodia	19	0	10	0	0	11	52.6	0.0	100.0
	BIPOID / BIPO Indonesia	13	1	5	0	0	12	38.5	0.0	100.0
	TEST0001 / TEST COMPANY	1	0	0	0	0	0	0.0	0.0	100.0
Grand Total		33	1	15	0	0	23	45.5	0.0	100.0

Resign % = Resignation / Beginning Headcount
 Turnover % = (End Headcount - Beginning Headcount) / Beginning Headcount
 Retention % = 100% - Turnover %

Average Headcount

Attrition Rate = Average Headcount

Average Headcount: $\frac{19 \text{ (Period Start)} + 11 \text{ (Period End)}}{2} = 15$

Resign %: $\frac{10 \text{ (Resignation)}}{15} * 100\% = 66.7$

		Period Start	New Join	Resignation	Trans In	Trans Out	Period End	Resign %	Turnover %	Retention %
Company										
	BIPOCam / BIPO Cambodia	19	0	10	0	0	11	66.7	0.0	100.0
	BIPOID / BIPO Indonesia	13	1	5	0	0	12	40.0	0.0	100.0
	TEST0001 / TEST COMPANY	1	0	0	0	0	0	0.0	0.0	100.0
Grand Total		33	1	15	0	0	23	53.6	0.0	100.0

Resign % = Resignation / Average Headcount
 Turnover % = (End Headcount - Beginning Headcount) / Average Headcount
 Average Headcount = (Beginning Headcount + End Headcount) / 2
 Retention % = 100% - Turnover %

End Headcount

Attrition Rate = End Headcount

Resign %: $\frac{10 \text{ (Resignation)}}{11 \text{ (Period End)}} * 100 = 90.9$

BIPO Service										
Manpower Distribution										
14/04/2022 (Thu) 10:05:20		Period 19/04/2021 to 31/03/2022					hrm - Page 1 of 1			
Range: ((Company in ('BIPOCam', 'BIPOID'))), Resignees Included										
		Period Start	New Join	Resignation	Trans In	Trans Out	Period End	Resign %	Turnover %	Retention %
Company	BIPOCam / BIPO Cambodia	19	0	10	0	0	11	90.9	0.0	100.0
Company	BIPOID / BIPO Indonesia	13	1	5	0	0	12	41.7	0.0	100.0
Company	TEST0001 / TEST COMPANY	1	0	0	0	0	0	0.0	0.0	0.0
Grand Total		33	1	15	0	0	23	65.2	0.0	100.0

Resign % = Resignation / End Headcount
 Turnover % = (End Headcount - Beginning Headcount) / End Headcount
 Retention % = 100% - Turnover %

Transfer Listing Report

This is the report that allow user to check on staff movement.

Access: Personnel Module > Report > Distribution > Transfer Listing

Transfer Listing Report

Print For: All 06/09/2021

Company as report header

Date Start: 01/01/2020

Date End: 06/09/2021

Transfer Fields: DesignationCode ...

Transfer Reasons: ...

Query: Default ... + - [Icons]

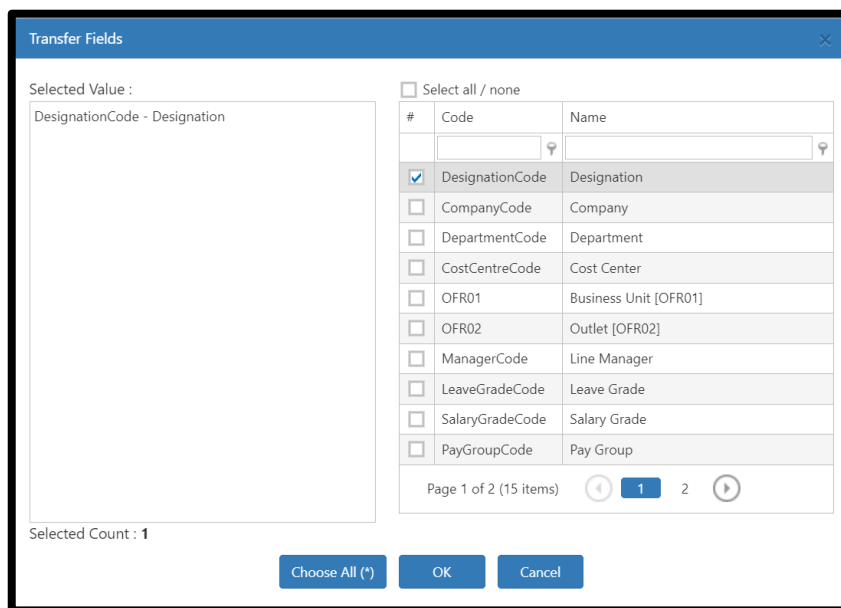
Sort By: Department
 Group By: Department
 Range: All Records

Preview Export Spreadsheet

1. Define value for the fields as below:

a) **Print For** – Select between: (followed by the given date duration)

- All
 - Existing
 - Resignees
- b) **Company as report header** – Tick the checkbox if the company name requires to appear as report header.
- c) **Date Start** – To define the start date of the period that need to be in the report.
- d) **Date End** – To define the end date of the period that need to be in the report.
- e) **Transfer Fields** – (Mandatory) Multiple selection for fields in Employee Master and Salary Details.



- f) **Transfer Reasons** – (Optional) The selection of the value can be defined under **Personnel Module > Reference > Assignment > Reason**.
- If the parameter **StatusChangeReason** under **System Config** is not enabled, this field can be ignored by leaving it as blank.
- If the parameter **StatusChangeReason** under **System Config** is enabled and no value is defined in this field, report will only show employees data that transfers with blank status change reason.
2. Click **Preview** button to display the output content without generate the report.
 3. Click **Export** button to generate the report in PDF format or **Spreadsheet** button to generate report in excel format.

Reference Master

Reference Menu is used to setup the overall structure of Organization in company level and Assignment & Personal from employee level.

Access: Personnel Module > Reference > Organization > Company

Company

1 Code Name

2 123

3 Company XYZ

4 No

5 Company XYZ

6

7 SG - Singapore

8 English

9

10 Update Close

Main	Address
Code	Address Line 1
Name	Address Line 2
Obsolete	Address Line 3
Local Name	City / Postal Code
Payslip Title	State/Province
Country/Region	Country/Region
Email Language	
House No	
Building Name	
Street Name	
Floor No / Unit No	
Village/Subdivision	
District/Barangay	
Telephone No	
Fax No	
Website	
Email	

Organization – Company

Follow the steps below in setting up a company:

1. Click add “ + ” icon to enter company details.
2. Code – Refer to Implementation Consultants to assign a code for the company.
3. Name – Enter the name of the company.
4. Obsolete:
 - No – Set company to active
 - Yes – Set company to inactive
5. Local Name – local name of the company
6. Payslip Title – Optional
7. Country/Region – Specify the country of the company.
8. Email Language – Set the email language.
9. Click the Address tab and enter the company address.
10. Click Update to save.
11. Once the new company is saved, additional tabs and fields will be enabled for the user to fill in accordingly.

12. Logo – Logo can be uploaded and display in payslip.
13. Language – This is to manage the display language. System allows user to change the default language used in menus. However, if user wish to display the company name in others language (by default is US English), there is a need to configure the setup in this field.

Below is a sample illustration showing the linkage between the language field in company creation and default language in ESS view.

Example: Client A has business across Malaysia and China and there is a requirement to display the company according to default system language.

Company Name	System Default Language	Display Language
Company ABC	English	Company ABC
	Chinese (Simplified) 中文简体	ABC 公司

a) If company name is defined in language as below:

The screenshot shows the configuration page for 'COMP_ABC'. The 'Language' table in the 'Logo' section is highlighted with a red box. It contains one entry: '中文简体' (Chinese Simplified) with the name 'ABC 公司'.

When employee login system with default language in Chinese (Simplified)中文简体.

Company name will be display in Chinese under ESS view.

The screenshot shows the ESS view with a search filter. The filter is set to 'COMP ABC - ABC 公司', which is highlighted with a red box. The interface is in Chinese, with '人事' (HR) at the top and '日历' (Calendar) on the left.

b) If language is undefined during company creation as below:

The screenshot shows the configuration page for 'COMP_ABC'. The 'Language' table in the 'Logo' section is highlighted with a red box. It is currently empty, showing 'No data to display'.

When employee login system with default language in Chinese (Simplified) 中文简体.



Company name will be display in default English under ESS view even system default language is Chinese. System captures the value in Name field if language if undefined.



This setup will impact the report screen that has the fields configured in the Language Corresponding to Login Language. For example, when logged in English, show the fields in English. When logged in zh-CN, show the fields value in zh-CN. Only when the zh-CN value is not maintained, system will show the fields in English.


Note: This multi languages setup is available under personal reference master fields as below:

- Reason Master
- Nationality Master
- Ethnic Master
- Religion Master
- Qualification Master
- Major Master
- Medical Plan Master
- Relationship Master
- Note Type Master
- Course Master

- Institute Master
- Certificate Master
- Personal Cert. Type Master
- Attachment Type Master

Organization – Department

This menu allows User to set up a department by providing the necessary details such as:


- Code** - Assign code to a department
- Name** - Name of the department
- Head of Department – Click the drop-down button with list of employees to assign.
- Training Manager - Click the drop-down button with list of employees to assign.
- Training Coordinator - - Click the drop-down button with list of employees to assign.
- Country Codes - * applicable to all countries. Click “” to specify.

Access: Personnel Module > Reference > Organization > Department

Code	<input type="text"/>
Name	<input type="text"/>
Head of Department	-- Please select --
Training Manager	-- Please select --
Training Coordinator	<input type="text"/> ...
Obsolete	No
Country Codes	* <input type="text"/> ...

Organization – Cost Centre

This menu allows User to set up a cost centre by providing the necessary details such as:


- Code** - Assign code to a cost centre
- Name** - Name of the cost centre
- Head of Cost Centre – Click the drop-down button with list of employees to assign
- Country Codes - * applicable to all countries. Click “” to specify

Access: Personnel Module > Reference > Organization > Cost Centre

Code	<input type="text"/>
Name	<input type="text"/>
Head Of Cost Centre	-- Please select --
Country Codes	* <input type="text"/> ...

Organization – Designation, Location, Employment Type

The steps and fields in creating Designation, Location and Employment Type are identical.

- Code** - Assign code to a designation / position
- Name** - Name of the designation
- Country Codes - * applicable to all countries. Click “” to specify

Access: Personnel Module > Reference > Organization > (Designation, Location, Employment Type)

Code	<input type="text"/>
Name	<input type="text"/>
Country Codes	* <input type="text"/> ...

Assignment - Pay Group

User can create multiple pay group that the company requires. Different pay groups are created to group the payroll process according to its categorization. BIPO system allows the creation of multiple pay groups within the same entity. Pay Group categorize employees from each pay frequency. Each Pay Group holds different cut-off and employee salary payment schedule in line with agreed payroll calendar. Within the Pay Group, there are possible country-specific settings to configure as well. Each Employee will be assigned a Pay Group for payroll processing. Pay Group is not necessary if the Payroll module is not utilized.

Access: Personnel Module > Reference > Assignment > Pay Group

Code	M		
Name	Singapore Payroll		
Company	123A - Company 123A		
Day Start	1	OT Day Start	0
Day End	31	OT Day End	0
Day Mid	16	Date of OT Payment	0
Bi-Monthly Method	Salary Factor	Date(s) of Salary Payment	0
First Half Salary Factor	0.50		
Basic Pay Rounding Method	-- Please select --		
Basic Pay Rounding Amount	0.00		
Basic Pay Proration	Work Day		
Resign in Current Run	-- Please select --		
Payroll Currency	SGD - Singapore Dollar		
CPF No	222222222		
MSO No			
CPF Voluntary No	33333333		
CPF Voluntary No 2			
Min day between Bank File and Pay Run	0		
Days Based On	W - Working Days		
Obsolete	No		

Dates covered for each type of pay frequency is configurable. You can also set the Salary Factor which the system will calculate accordingly to Basic Pay Proration. A company can set multiple Pay Group depending on how their employees are scheduled to be paid. The settings below are usually done on-set of client onboarding.

Standard Fields in Pay Group

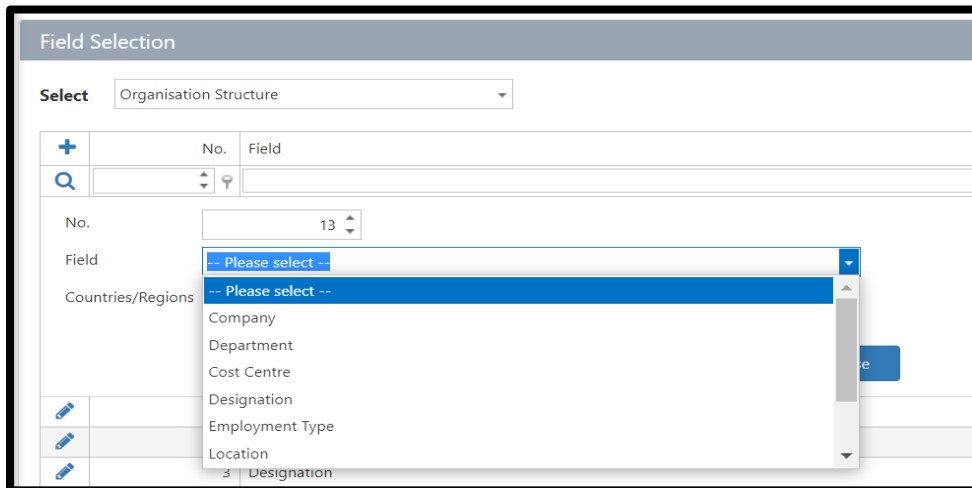
- Code – Assign a code to Pay Group
- Name – Name of Pay Group. Usually indicates if monthly / bi-monthly or the pay frequency
- Company – Drop-down list of companies created under **Reference > Organization > Company**
- Day Start – Day start of the month
- Day End – Day end of the month
- Day Mid – Day mid to of the month
- First Half Salary Factor – if bi-monthly, set the percentage of salary that will be credited on first payroll. The succeeding will automatically be paid out on the Second run.
 - 0.5 – Half Factor
 - 1 – Full Factor
- Basic Pay Proration – Choose from:
 - Calendar – System will follow the calendar working days
 - Work Day – System will follow the actual work day that the employee worked
 - Roster – System will follow the employee roster
- Payroll Currency

Other fields in addition to the above-listed ones will be considered country-specific. This means that only when you are in the respective country, then you will be able to see the additional fields.

Spare Field

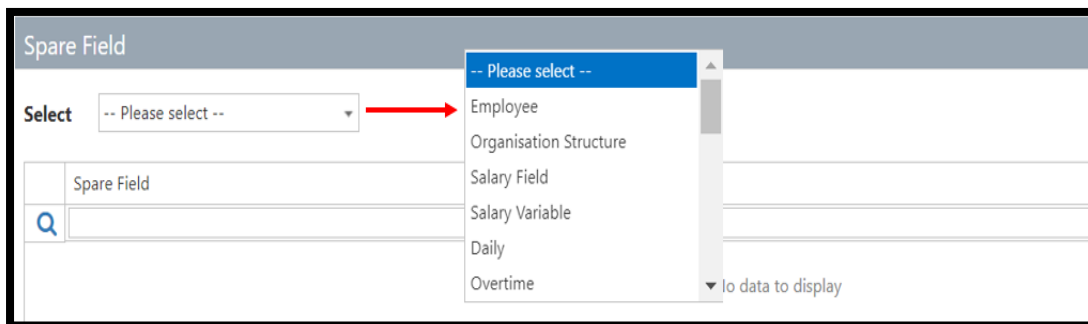
The purpose of Spare Field is to allow user to create additional field in employee's **Personnel Master page**. By default, user can add/remove some of the non-mandatory fields, and Spare Field provides the flexibility to add and customized addition fields that is not in the *Personnel Master* by default.

For example, Job Grade field is not available by default in Field Selection > Org Structure and user cannot add it into the Org Structure section in Personal > Assignment tab. Hence, need to create Job Grade field using Spare Field.



As shown in the screenshot above, there is no default field for Job Grade. Access Spare Field to create Job Grade field

Access: Setup > Setting > Spare Field



Spare Field Setup

The following example, we will use Spare Field to create additional field for Org Structure section as illustration.

Follow the steps below in Setting up Spare Field:

- g) The first step is to create the necessary **Fields** in Spare Fields menu. User need to select the type of Spare Field to use and add a **Caption**, for example:
 - a. *Character* – field type that employs alpha numerical characters
 - b. *Numeric* – field type that only used when the field is only for numerical entry
 - c. *Reference* – this field type will allow user make selections from the drop-down list, as illustrated in the screenshot below:

Example of *Field Type = Reference*, where user can make one selection from the drop-down list.

Department: -- Please select --

Designation: AST - Assistant
AST_DIR - Assistant Director

Location: CE - Customer Service Executive

Cost Centre: DIR - Director
EXEC - Executive

Employment Type: MGR_ASTMGR - Manager/Assistant Manager

Team: -- Please select --

d. Selection - this field type will allow user to make multiple selection, as illustrated in the screenshot below:

Example of Field Type = Selection, where user can make multiple selection.

Org Structure*

Date Start*: 01/01/2020

Company*: BIPOMY

Department: -- Please select --

Designation: NONE

Location: -- Please select --

Cost Centre: -- Please select --

Employment Type: -- Please select --

Team: -- Please select --

Assignment: A,B

Last Update By: hrm - 31/05/2022 (Tue) 00:13:44

Select dialog:

Selected Value :
A - Project A
B - Project B

Select all / none

#	Code	Name
<input checked="" type="checkbox"/>	A	Project A
<input checked="" type="checkbox"/>	B	Project B
<input type="checkbox"/>	C	Project C
<input type="checkbox"/>	E	Project E

h) Below is a sample chart that will be created together with the type of fields that will be used.

Spare Field	Caption
OFR01 – Org Structure Reference 01	Team
OFS01 – Org Structure Selection 01	Assignment

Access: Setup > Setting > Spare Field > Select: Organisation Structure

i) Select **OFR01 Reference Field** and enter the **Caption** for **Team**:

OFR01	Org Structure Reference 01	Team
OFR02	Org Structure Reference 02	
OFR03	Org Structure Reference 03	

j) Select **OFS01 Selection Field** and enter the **Caption** for **Assignment**:

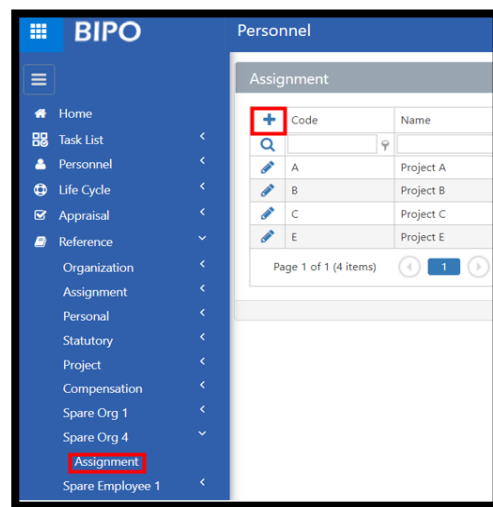
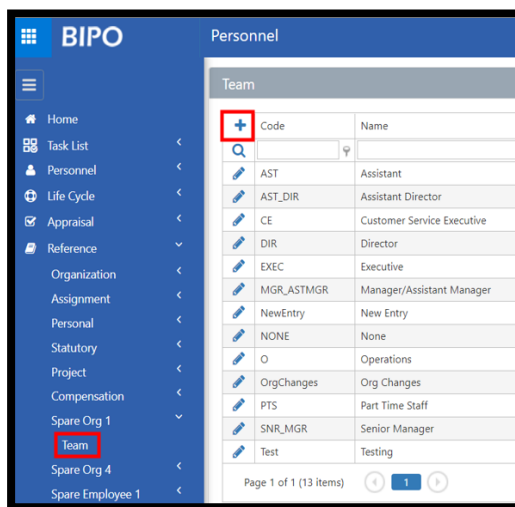
 OFS01 Org Structure Selection 01	Assignment
 OFS02 - Org Structure Selection 02	
 OFS03 - Org Structure Selection 03	

k) Once the Spare Field has been created, next is to use Field Selection to map the created Spare Field to Org Structure.

Adding Selections for Reference and Selection Field Type

This section will cover the steps in creating the drop-down selection content for **Spare Field Type = Reference or Selections**. When **Spare Field Type** is **Reference or Selection**, user need to create the drop-down content.

1. **Access: Personnel Module > Reference > Spare Org 1 / Spare Org 4**



2. The created **Spare Field (Type = Reference or Selection)** will appear under **Spare Org**. In the example above, the **OFR01 Reference Field (Team)** appears in **Spare Org 1** while **OFS01 Selection Field (Assignment)** appears in **Spare Org 4**

3. Select the **Field** under each **Spare Org**.

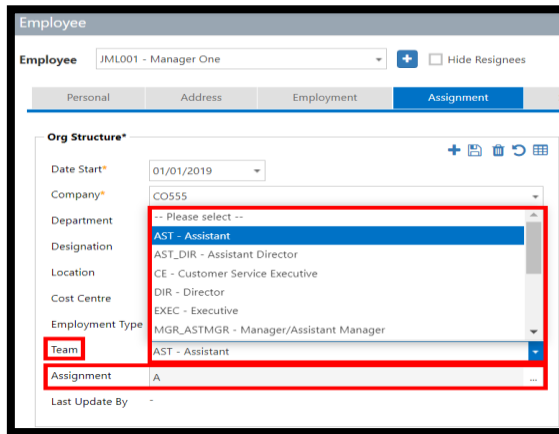
4. Click **+** button to create content for selection.

5. Enter the **Code** and **Name**.

6. Click **Update** button.

7. Repeat the steps to add the other selection.

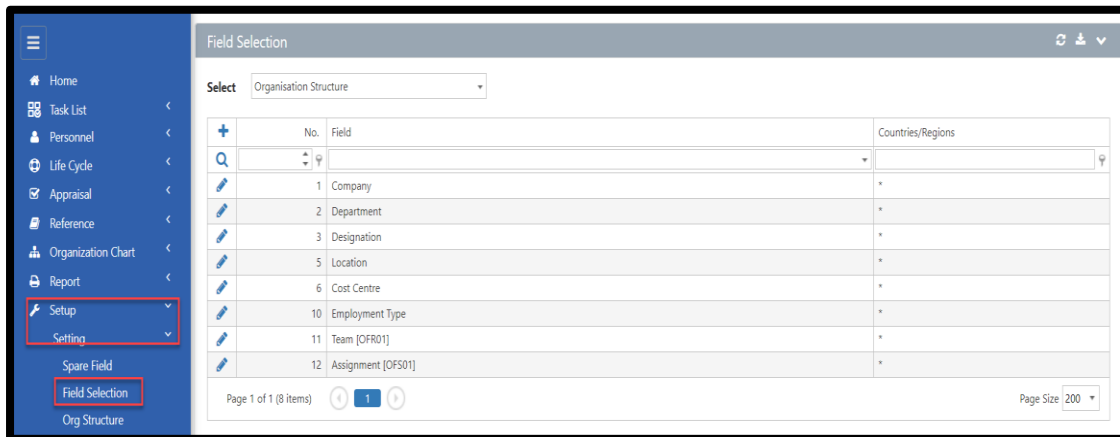
8. Selections content for the respective **Field** will now be available:



Field Selection

Field Selection is used to map the *Spare Field* created to the correct menu/pages accordingly in BIPO System. User can also select the applicable Country/Region that the *Spare Field* will be available/visible to.

Access: Setup > Setting > Field Selection



Field Selection Setup

Follow the steps below to map Spare Field in **Field Selection**. We will be using the same examples of the *Org Structure Fields* created in *Spare Field* and map it to the *Org Structure Section* in *Assignment Tab* using *Field Selection*.

Access: Setup > Setting > Field Selection > Select: Organisation Structure

The screenshot shows the 'Field Selection' window with the 'Organisation Structure' section selected. A table lists various fields with their sequence numbers and visibility options. The field 'Team [OFR01]' is highlighted, and its configuration details are shown below the table. Red boxes highlight the '+' button, the 'Team [OFR01]' field in the table, the 'Team [OFR01]' field in the configuration dropdown, and the 'Update' button.

No.	Field	Countries/Regions
1	Company	*
2	Department	*
3	Designation	*
5	Location	*
6	Cost Centre	*
10	Employment Type	*
11	Team [OFR01]	*

Configuration for No. 11:

- Field: Team [OFR01]
- Countries/Regions: *
- Use In Commission Module: ...

Buttons: Update, Delete, Close

1. Select *Org Structure* in the drop-down list under *Section* field.
2. Click **+** button to add the *Fields* that were created earlier.
3. *No.* field relates to the sequence order.
4. Select the *Field* that needed to add to the *Organisation Structure* from the *Field* drop down selection.
5. Select the *Countries/Regions* that this field will be visible to.
6. Click *Update* button.
7. Repeat the steps to add the other *Fields*.

Org Structure*

Date Start* 01/01/2020

Company* BIPOMY

Department -- Please select --

Designation NONE

Location -- Please select --

Cost Centre -- Please select --

Employment Type -- Please select --

Team EXEC - Executive

Assignment A,B

Last Update By hrm - 31/05/2022 (Tue) 00:13:44

Field Selection Setup: Org Structure Relationship

The relationship for the fields in org structure can be set in system. System by default only allows to set one linier set of relationship. There is a config that allows user to set multiple linier set of org structure relationship.

Org Structure Relationship field selection is used to specify the fields that will be available in **Setup > Setting > Org Structure**.

Access: Setup > Setting > Field Selection: Org Structure Relationship

Field Selection

Select Org Structure Relationship

+	No.	Field
	1	Company
	2	Designation
	3	Location

System config "**UseNewOrgStructureRelationship**" must be set to allow multiple Org Structure Relationship to be defined.

Access: System > Config > Base > Parameter > UseNewOrgStructureRelationship

- If value is N, system will use the current Org Structure Relationship setup.

System Config (Base)

Section: Parameter

Section	Name	Value
Parameter	UseNewOrgStructureRelationship	N

Name: UseNewOrgStructureRelationship

Value: N

Description: Determines whether to use new Org Structure Relationship. Y=Yes, N=No. Default value is N.

Update Version: 2209/J06700

Buttons: Update, Close

Setup > Setting > Org Structure

Org Structure Relationship

Date Start	Company	Designation	Location

Date Start: [Dropdown]

Company: -- Please select --

Designation: -- Please select --

Location: -- Please select --

Buttons: Update, Close

Following the value of system config *UseNewOrgStructureRelationship* if N, **Append Org Structure** menu will be available and user can also upload **Org Structure Relationship**.

Access: Setup > Setting > Append Org Structure

BIPO Personnel

Append Org Structure

Step 1: Append from Excel

Step 2: Org Structure Relationship

Step 3: [Empty]

Uploaded Files: [Empty]

Excel File: Select a file... [Browse]

Upload

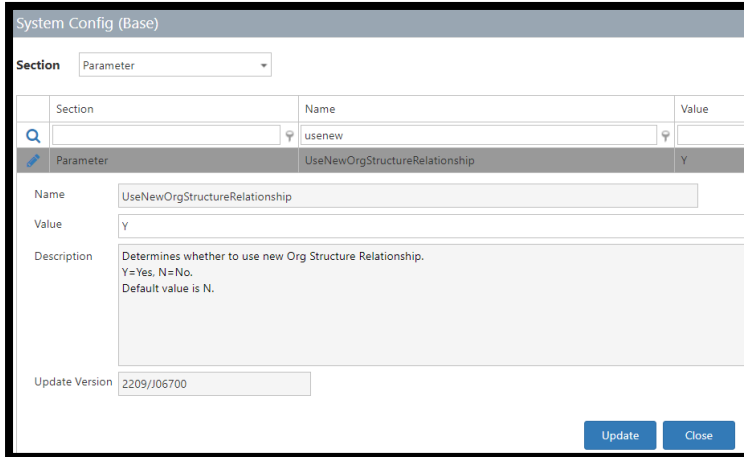
Excel Fields: Mandatory: DateStart
Optional: Field01, Field02, Field03, Field04, Field05, Field06, Field07, Field08, Field09, Field10

Buttons: Next, Import

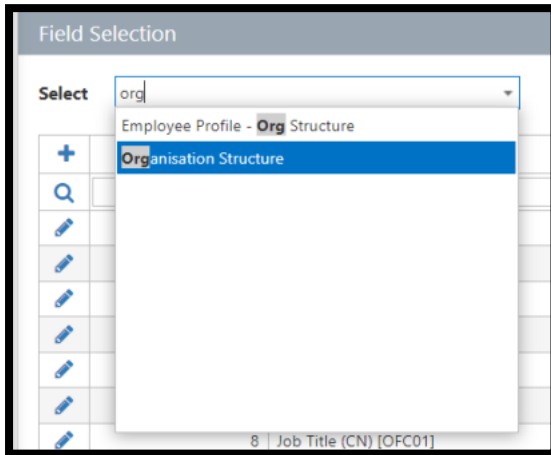
Left Menu: Home, Task List, Personnel, Life Cycle, Appraisal, Reference, Organization Chart, Report, Setup, Setting, Spare Field, Field Selection, Org Structure, **Append Org Structure**, Default Value

- If value is Y, system will use the new Org Structure Relationship setup to allow entry

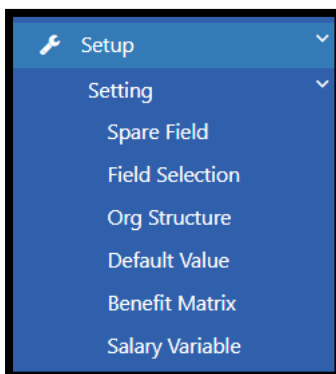
of multiple Org Structure



The **Org Structure Relationship** will be removed from the Field Selection.



And **Append Org Structure** will be unavailable.



Multiple Org Structure can now be defined for employee.

Setup > Setting > Org Structure

The screenshot shows the 'Org Structure Relationship' window. At the top, there are tabs for Level 1 through Level 4. Below this is a table with the following data:

Date Start	Company	Department	Cost Center	Designation
30-03-2023	Singapore Demo Company	00100 - TEST	0000000001 - AT Testing	0101ID - Associate Project Consultant
30-03-2023	Company A1	001Sales - Sales Department Z	0000066146 - 0000066146	1991DES - 1991DESIGNATION

Below the table, there are dropdown menus for Levels 1 through 10. Level 1 is set to 'Company', Level 2 to 'Department', Level 3 to 'Cost Center', and Level 4 to 'Designation'. Levels 5 through 10 are set to '-- Please select --'. At the bottom, there is a page indicator 'Page 1 of 1 (2 items)' and a 'Page Size' dropdown set to '100'.

Work Location

The **Work Location** is used to enter the address location of department, division, job classification, designation etc..depending on the **Select**. If **Work Location** selected is Department, then user can create different addresses for different departments.

Access: Personnel Module > Reference > Other > Work Location

The screenshot shows the 'Work Location' window. At the top, there is a 'Select' dropdown menu set to 'Department'. Below this is a table with the following data:

Department	Address Line 1	Address Line 2	Address Line 3	City	Postal Code	State/Province	Country/Region
003 - Finance							

Below the table, there are input fields for Address Line 1, Address Line 2, Address Line 3, City / Postal Code, State/Province, and Country/Region. At the bottom, there is a checkbox for 'Singapore Business Census (BC)' and 'Update' and 'Close' buttons.

Global Password

Global Password sets the password type or format used in logging in to Employee Self-Service.

Creating ESS Login

Login ID in Employee Master will be the username of employee in ESS. As a sample, Login ID is same with Employee Code, but it is company’s discretion to have their own format.

Access: Personnel Module > Personnel > Employee > Personal Tab

The screenshot shows the 'Employee' record for '1001 - John Tan'. The 'Personal' tab is selected. The 'Login ID' field is highlighted with a red box and contains the value '1001'. Other fields include Employee Code (1001), Birth Date (10/10/1965), First Name (John), Last Name (Tan), and Full Name (John Tan).

Setting Global Password

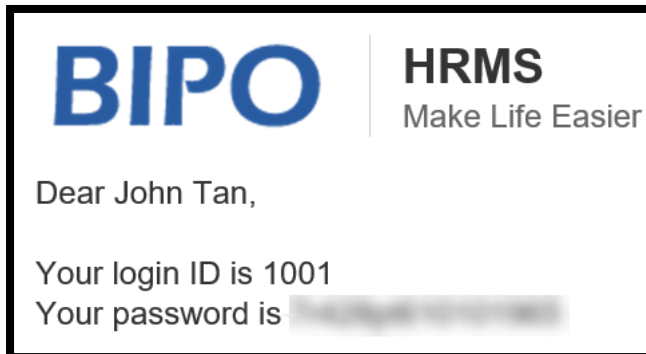
Access: Personnel Module > Personnel > Utility > Global Password

The screenshot shows the 'Global Password' configuration screen. Step 1 is 'Start a new Global Update'. Step 2 is 'Password' configuration. The 'Password Type' is set to 'Lowercase & Uppercase Alphanumeric'. The 'Concatenate with (optional)' is set to 'Employee Birthdate'. The 'Date Format' is 'ddmmyyyy'. There are checkboxes for 'Send Email' and 'Force change password at next login', both of which are checked. The 'Employee Range' is set to '(0=0)'. There are 'Next' and 'Process' buttons at the bottom.

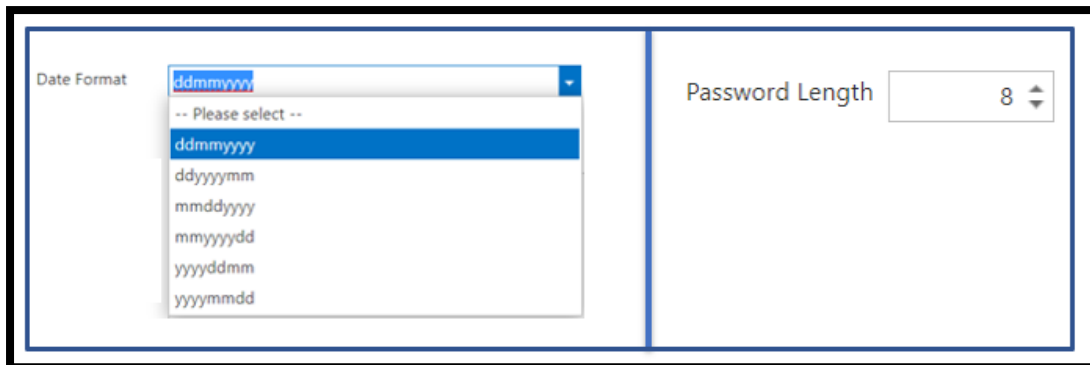
Follow the steps below in setting Global Password:

1. Step 1 – Select **Start a new Global Update** - Clear previous password reset flag will undo the previous password reset flag.
2. Step 2 – **Password Type** – Select the password type that will apply to all Users. There are given choices from the drop-down list. As a sample, Step 2 has been set to “Employee Birthdate”.

Note: Selections such as Lowercase Alphanumeric, Uppercase Alphanumeric and Lowercase & Uppercase Alphanumeric will be random characters.



3. Password Length / Date format – It varies to password type “Employee Birthdate”. If password type requires characters, it will change to Password Length instead.



4. Send Email – This will send an email to the email address in Employee Master with Login ID and password.
5. Force change password at next login – Tick if applicable. Unticked will remain the default password that has been set.
6. Employee Range controls the only applicable employee/s that will affect the password setup. Value should be set to “(0=0)” if it applies to all. In the sample, it applies only to one employee. Click “+” to specify employee/s.
7. Click Next. The specified employee/s will be displayed and other information such as email address.

Invalid	Employee Code	Employee Name	Local Name	Email	Password	Send Email	Force Change Password
	1001	John Tan		@biposervice.com	*****	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Page 1 of 1 (1 items) | Page Size 200

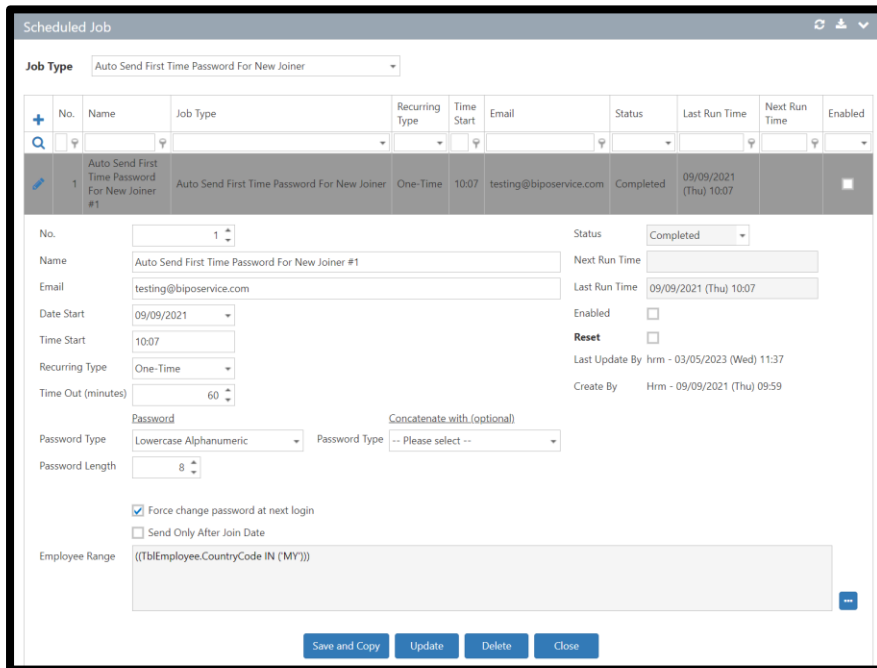
8. Click Process.

9. This will prompt the confirmation. Hit OK
10. Notification will be displayed upon successful processing.

Scheduled Job – Auto Send First Time Password For New Joiner

This schedule job is used to auto send out new password email notification for new joiner.

Access: Setup > Scheduled Job > Job Type: Auto Send First Time Password For New Joiner



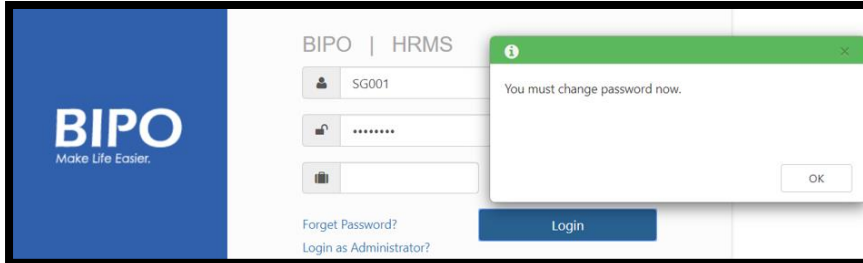
1. **No** – Sequence number.
2. **Name** – Name of the Job Type.
3. **Email** – A notification will be sent to this email address when there is issue in sending the email.
4. **Date Start** – Start date of sending the new password email.
5. **Time Start** – Start time of sending the new password email.
6. **Recurring Type** – Select the Job Type frequency from:
 - a. One-Time
 - b. Daily
 - c. Monthly
 - d. Yearly
 - e. Interval
7. **Time Out (minutes)** – If there is an error when sending the notification, system will

time out based on the minutes specified.

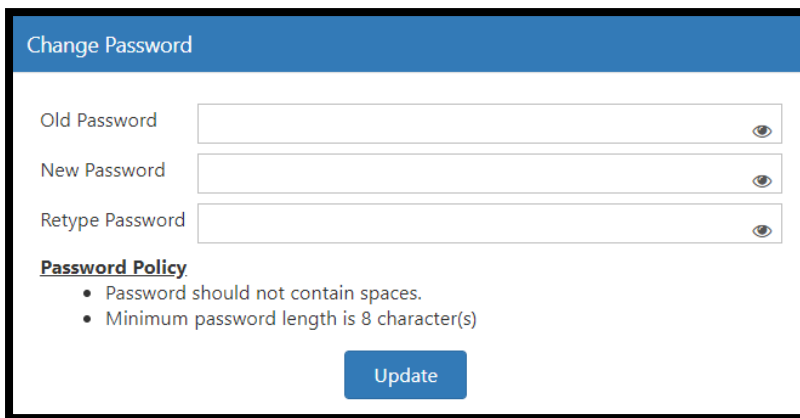
8. **Password Type** – Select the password type that will apply to all Users. There are given choices from the drop-down list.
9. **Password Length / Date format** – It varies to password type “Employee Birthdate”. If password type requires characters, it will change to Password Length instead.
10. **Force change password at next login** – Tick the **Force change password at next login** to allow user to change password upon logging in. This checkbox is recommended to tick for Company HR to do this for security purposes.
11. **Send Only After Join Date** – If this checkbox is ticked and today date larger or equal to New Joiner’s join date, system will only trigger the password email after the join date.
12. **Status** – The Job Type would be tagged as:
 - a. Completed – Successful processing of job type.
 - b. Running – System currently running the job type.
 - c. Failed – Failed processing of job type.
13. **Next Run Time** – The next scheduled time for sending the notification.
14. **Last Run Time** – The last run time when the notification was triggered.
15. **Enabled** – Tick to enable the job type. If unticked, the system will not process the job type.
16. **Reset** – For any changes in the scheduled processing (from One-Time to Monthly), Reset must be ticked. If the user did not tick **Reset** and only clicked on **Update** button, the **Last** and **Next Run Time** will not change.
11. **Employee Range** – To control the only applicable employee/s that will affect the password setup. Value should be set to “(0=0)” if it applies to all.

Employee Login

When an employee tries to log in and use the password that was set, It will prompt a notification for password change since Force change password at next login is ticked.



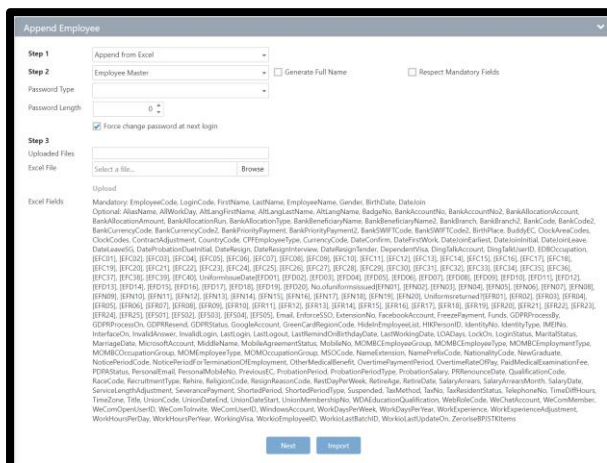
Employee will nominate a personal password that follows the Password Policy.



Append Employee

Append Employee is used to upload bulk employees into the system by selecting *Append from Excel* in *Step 1* and *Employee Master* in *Step 2*. Mandatory fields are indicated in the Excel Fields section in the menu. These fields need to be populated to push through with the upload.

Access: Personnel Module > Utility > Append Employee



Append Employee Upload

Follow the steps below in Appending Employee:

1. Download Employee Master template in Step 1 by selecting **Export Excel Template**.
2. Step 2 – Select **Employee Master**.

The screenshot shows the 'Append Employee' interface. It has a title bar 'Append Employee'. Below it, there are two dropdown menus: 'Step 1' is set to 'Export Excel Template' and 'Step 2' is set to 'Employee Master'. Below these is a 'Field Selection' field with an asterisk and a dropdown arrow. At the bottom left, there is a checkbox labeled 'Export With Data' which is currently unchecked.

3. Click Export. This will download the excel template to be populated.

Note: When Export With Data checkbox is ticked, Employee Range field will be enabled and the downloaded file template will be populated with sample data as defined in Employee Range.

This screenshot shows the 'Append Employee' form with the 'Export With Data' checkbox checked. The 'Employee Range' field is now enabled and shows '(0=1)'. The 'Export' button is visible at the bottom center of the form.

4. There are important things to note in completing the template:
 - Date format in template should be DD/MM/YYYY
 - Marital Status: Enter “S” for Single and enter “M” for married
 - Template should be saved as (.xlsx) file
 - Users can update the fields in the system and trace the exact value to be used in the Data Update Log (**System > Logs > Data Update Log**).
 - Make sure that the User access Country/ Regions is enabled to the appropriate country. If the country is not correctly specified, User will only view certain country to company.

5. The template is country-specific depending on the login access. If User is accessing SG country, then template will display SG related header.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	
EmployeeC	IdentityNo	LoginCode	FirstName	LastName	EmployeeN	Gender	BirthDate	DateJoin	AliasName	AllWorkDa	Alt.Lang	Nar	BadgeNo	BankAccou	BankAccou	BankAlloca	Amount	BankAlloca

Template Field	Remarks
Employee Master	Use this option to create new master records. This step must be carried out first for new employee records
Identity Details	Use this option to upload country-specific identity details of employees. This template is also date-driven, allowing you to enter date issue and expiry
Org Structure Detail	Use this option to upload cost centre, department, designation and location of an employee.
Leave Grade Detail	Use this option to upload the leave grade details of employees
Pay Group Detail	Use this option to upload employees pay group. Note to only indicate Pay Group Code in the template
Manager Detail	Use this option to upload the manager code including the manager type code of employees.
Calendar Detail	Use this option to upload calendar code and work pattern code (optional) of employees
OT Group Detail	Use this option to upload OT group code. Start date is a mandatory field in the template
Salary Detail	Use this option to upload salary information of employees such as salary fixed and salary gross. Other succeeding columns are optional

Template Field	Remarks
Address Detail	Use this option to upload employees' address information
Cost Centre Detail	Use this option to upload the cost centre detail/s of employees. Note that you can enter split cost centre per employee by entering the correct number of percentage
Family Detail	Use this option to upload employees' family detail/s. Not all fields are mandatory
Contract Detail	Use this option to upload contract name, type, end-date, discontinued request ID, remarks, renewed, request ID
Emergency Detail	Use this to option to upload emergency detail of employees such as the contact address and mobile no
Must Clock Detail	Enter: Y=yes, N=no per employee for record and systems purposes
Family Identity Detail	Use this option to upload family name, identity type, country code, date cancel, expiry, date issue, identity class and new issue

6. Under *Step 1*, select **Append from Excel and Employee Master** on *Step 2*. Click on Browse and select the upload template. Make sure that the template to upload is (.xlsx) file.

The screenshot shows the 'Append Employee' form with the following details:

- Step 1:** A dropdown menu set to 'Append from Excel'.
- Step 2:** A dropdown menu set to 'Employee Master', with checkboxes for 'Generate Full Name' and 'Respect Mandatory Fields'.
- Password Type:** A dropdown menu.
- Password Length:** A numeric input field set to '0'.
- Force change password at next login:** An unchecked checkbox.
- Step 3:** An 'Uploaded Files' section with a file input field.
- Excel File:** A file named 'Employee Master (1).xlsx' is selected, with a 'Browse' button and a red 'X' icon.
- Upload:** A blue 'Upload' button at the bottom.

- Users may setup the password for newly appended employee record by defining Password Type and Password Length.
- Force change password at next login checkbox is recommended to tick for Company HR to do this for security purposes.

9. If Org Structure Detail or Salary Detail is selected in Step 2. There is a Get Previous Data checkbox enabled when this template is appended.
- When Get Previous Data checkbox is unticked, the optional fields that are not inside the import file will be imported with blank value.
 - When Get Previous Data checkbox is ticked, the optional fields that are not inside the import file will be populated with the value from the previous record (if any).
 - When Get Previous Data checkbox is ticked and the import file contains Salary Variable fields that require computation, system will perform the calculation.

Example:

Existing Record:

Date Start	Salary Fixed	Salary Variable 01	Salary Gross
01/01/2021	100,000.00	6,000.00	106,000.00

- If the uploaded file only contains Date Start = 01/01/2022 and Salary Fixed = 110,000, and the “Get Previous Data” is unticked, expected record will be as below:

Date Start	Salary Fixed	Salary Variable 01	Salary Gross
01/01/2022	110,000.00		110,000.00
<i>Based on new value in the file.</i>	<i>Based on new value in the file.</i>	<i>Blank and no value</i>	<i>Based on new calculation</i>

- If the uploaded file only contains Date Start = 01/01/2022 and Salary Fixed = 110,000, and the “Get Previous Data” is ticked, expected record will be as below:

Date Start	Salary Fixed	Salary Variable 01	Salary Gross
------------	--------------	--------------------	--------------

01/01/2022	110,000.00	6,000.00	116,000.00
<i>Based on new value in the file.</i>	<i>Based on new value in the file.</i>	<i>Capture the previous data.</i>	<i>Based on new calculation</i>

- If the uploaded file only contains Date Start = 01/01/2022, Salary Fixed = 110,000, Salary Gross = 120,000, and the “Get Previous Data” is ticked, expected record will be as below:

Date Start	Salary Fixed	Salary Variable 01	Salary Gross
01/01/2022	110,000.00	6,000.00	116,000.00
<i>Based on new value in the file.</i>	<i>Based on new value in the file.</i>	<i>Capture the previous data.</i>	<i>Still based on the new calculation and will ignore the value in the file.</i>

10. Click on Upload.

11. Click on Next Button. If template has an error, it will display in red font and automatically downloads an excel error file. Correction should be made in the template upload and submit for re-upload.

Step 3

Uploaded Files

Excel File

Upload

Invalid Column Mapping:
 [CTCAmountPaid]
 [CTCIssueDate]
 [CTCIssuePlace]
 [CTCNo]
 [DateProbationDue]
 [PaglBIGNo]
 [PhilHealthNo]
 [SSSNo]
 [TaxStatus]


12. If no error occurred during the upload, this will enable the Import button. Once clicked, the records will be saved in the database.




Hiring History Details

The configuration must be checked to ensure that the upload will reflect the hiring details specifically the significant dates relating to employee's work service.

Access: System > Config > Base > Section: Parameter

If UseHireDetail is set to value Y, then the option “” will be enabled. After the upload, the Join Date will automatically reflect in Employee Master.

The option “” allows User to enter multiple hiring dates (if employee is contractual and renewed for example).

Error Message Reference for Append Employee Transaction

Error Message	Remarks
Error on column mapping	This is usually due to selection type to upload doesn't match the file selected to upload
Employee Code / Identity no already exists	Employee Code or Identity Number do not match what is available in the database
Check user permission	This is due to permission rights for write access
Check Employee Code / IdentityNo with empty value	Employee Code & Identity Number are compulsory fields. Therefore, cannot be blank
Check Duplicate record in database	Same information already exist in database
Check validation of SG identity no	Value provided in the file does not match the required format for the SG Identity number
Reference validation	This is commonly due to values like Department code, etc non-existent in the database
Check numeric value	Value given is not numeric as required
Check detail record must not overlap	Record in file already exist in database
Validate CPF info	Employee CPF information is empty

Update Employee

Update Employee can be done in bulk via upload using the Append Employee menu. It basically has the same procedure of uploading except that Step 1 should be selected as Update from Excel. Update from Excel has two options under Step 2 which is:

- Employee Master File – used to update employee records from Employee Master
- Org Structure Detail – used to update Org Structure which is also from Employee Master

Access: Personnel Module > Utility > Append Employee

Append Employee

Step 1 Update from Excel

Step 2 Employee Master Generate Full Name Include Resignee

Step 3

Uploaded Files

Excel File: Select a file...

Upload

Excel Fields

Mandatory: EmployeeCode, IdentityNo

Optional: LoginCode, FirstName, LastName, EmployeeName, Gender, BirthDate, DateJoin, AliasName, AllWorkDay, AltLangName, BadgeNo, BankAccountNo, BankAccountNo2, BankAllocationAccount, BankAllocationAmount, BankAllocationRun, BankAllocationType, BankBeneficiaryName, BankBeneficiaryName2, BankBranch, BankBranch2, BankCode, BankCode2, BankCurrencyCode, BankCurrencyCode2, BirthPlace, BuddyEC, ClockAreaCodes, ClockCodes, ContractAdjustment, CountryCode, CPFEmployeeType, CurrencyCode, DateConfirm, DateFirstWork, DateJoinInitial, DateJoinLeave, DateLeaveSG, DateResign, DateResignInterview, DateResignTender, DependentVisa, DingTalkAccount, DingTalkUserID, EDBOccupation, MedicalInsuranceCoverage[EFC01], VisionInsuranceCoverage[EFC02], HSA[EFC03], FSA[EFC04], [EFC05], [EFC06], [EFC07], [EFC08], [EFC09], DentalInsuranceCoverage[EFC10], [EFC11], [EFC12], [EFC13], [EFC14], [EFC15], [EFC16], [EFC17], [EFC18], [EFC19], [EFC20], [EFD01], [EFD02], [EFD03], [EFD04], [EFD05], [EFD06], [EFD07], [EFD08], [EFD09], [EFD10], Height[EFN01], Weight[EFN02], [EFN03], [EFN04], [EFN05], [EFN06], [EFN07], [EFN08], [EFN09], [EFN10], [EFN11], [EFN12], [EFN13], [EFN14], [EFN15], [EFN16], [EFN17], [EFN18], [EFN19], [EFN20], PFScheme[EFR01], Section[EFR02], HMOCoverage[EFR03], [EFR04], [EFR05], [EFR06], [EFR07], [EFR08], [EFR09], [EFR10], [EFR11], [EFR12], [EFR13], [EFR14], [EFR15], [EFR16], [EFR17], [EFR18], [EFR19], [EFR20], [EFR21], [EFR22], [EFR23], [EFR24], [EFR25], [EFS01], [EFS02], [EFS03], [EFS04], [EFS05], Email, EnforceSSO, ExtensionNo, FacebookAccount, ForceChangePassword, FreezePayment, Funds, GDPRProcessOn, GDPRResend, GDPRStatus, GoogleAccount, GreenCardRegionCode, HideInEmployeeList, IdentityType, IMEINo, InterfaceOn, InvalidAnswer, InvalidLogin, LastLogin, LastLogout, LastRemindOn, BirthdayDate, LastWorkingDate, LOADays, LockOn, LoginStatus, MaritalStatus, MarriageDate, MicrosoftAccount, MiddleName, MobileAgreementStatus, MobileNo, MCMOccupationGroup, MSCCode, NameExtension, NamePrefixCode, NationalityCode, NewGraduate, NoticePeriodForTerminationOfEmployment, OtherMedicalBenefit, OvertimePaymentPeriod, OvertimeRateOfPay, PaidMedicalExaminationFee, Password, PasswordDate, PasswordLetter, PasswordPayslip, PasswordQuestionAnswer, PasswordQuestionName, PasswordResetOn, PersonalEmail, PersonalMobileNo, PreviousEC, ProbationPeriod, ProbationPeriodType, ProbationSalary, PRRenounceDate, QualificationCode, RaceCode, RecruitmentType, Rehire, ReligionCode, ResignReasonCode, RestDayPerWeek, RetireAge, RetireDate, SalaryArrears, SalaryDate, ServiceLengthAdjustment, SeverancePayment, Suspended, TaxMethod, TaxNo, TelephoneNo, Title, UnionCode, UnionDateEnd, UnionDateStart, UnionMembershipNo, WDAEducationQualification, WebRoleCode, WindowsAccount, WorkDaysPerWeek, WorkExperience, WorkExperienceAdjustment, WorkHoursPerDay, WorkHoursPerYear, WorkingVisa

Update from Excel

Follow the steps below in Updating Employee records:

1. Under Step 1, choose **Export Excel Template** then select **Employee Master** or **Org Structure Detail** in Step 2 depending on which is to Update.

Append Employee

Step 1 Export Excel Template

Step 2 Employee Master

Field Selection: + ...

Export With Data

Append Employee

Step 1 Export Excel Template

Step 2 Org Structure Detail

Field Selection: + ...

Export With Data

2. Click **Export**. This will download the excel template to be populated.

Note: When Export With Data checkbox is ticked, the downloaded file template will be populated with sample data.

3. The template is country-specific depending on the login access. If User is accessing SG country, then template will display SG related header. Excel Fields indicates the Mandatory and Optional Fields. The updated information to be uploaded should be populated in the template under the Optional Field.

Excel Fields	<p>Mandatory: EmployeeCode, IdentityNo</p> <p>Optional: LoginCode, FirstName, LastName, EmployeeName, Gender, BirthDate, DateJoin, AliasName, AllWorkDay, AltLangName, BadgeNo, BankAccountNo, BankAccountNo2, BankAllocationAccount, BankAllocationAmount, BankAllocationRun, BankAllocationType, BankBeneficiaryName, BankBeneficiaryName2, BankBranch, BankBranch2, BankCode, BankCode2, BankCurrencyCode, BankCurrencyCode2, BirthPlace, BuddyEC, ClockAreaCodes, ClockCodes, ContractAdjustment, CountryCode, CPFEmployeeType, CurrencyCode, DateConfirm, DateFirstWork, DateJoinInitial, DateJoinLeave, DateLeaveSG, DateResign, DateResignInterview, DateResignTender, DependentVisa, DingTalkAccount, DingTalkUserID, EDBOccupation, MedicalInsuranceCoverage[EFC01], VisionInsuranceCoverage[EFC02], HSA[EFC03], FSA[EFC04], [EFC05], [EFC06], [EFC07], [EFC08], [EFC09], DentalInsuranceCoverage[EFC10], [EFC11], [EFC12], [EFC13], [EFC14], [EFC15], [EFC16], [EFC17], [EFC18], [EFC19], [EFC20], [EFD01], [EFD02], [EFD03], [EFD04], [EFD05], [EFD06], [EFD07], [EFD08], [EFD09], [EFD10], Height[EFN01], Weight[EFN02], [EFN03], [EFN04], [EFN05], [EFN06], [EFN07], [EFN08], [EFN09], [EFN10], [EFN11], [EFN12], [EFN13], [EFN14], [EFN15], [EFN16], [EFN17], [EFN18], [EFN19], [EFN20], PFScheme[EFR01], Section[EFR02], HMOCoverage[EFR03], [EFR04], [EFR05], [EFR06], [EFR07], [EFR08], [EFR09], [EFR10], [EFR11], [EFR12], [EFR13], [EFR14], [EFR15], [EFR16], [EFR17], [EFR18], [EFR19], [EFR20], [EFR21], [EFR22], [EFR23], [EFR24], [EFR25], [EFS01], [EFS02], [EFS03], [EFS04], [EFS05], Email, EnforceSSO, ExtensionNo, FacebookAccount, ForceChangePassword, FreezePayment, Funds, GDPRProcessBy, GDPRProcessOn, GDPRResend, GDPRStatus, GoogleAccount, GreenCardRegionCode, HideInEmployeeList, IdentityType, IMEINo, InterFaceOn, InvalidAnswer, InvalidLogin, LastLogin, LastLogout, LastRemindOnBirthdayDate, LastWorkingDate, LOADays, LockOn, LoginStatus, MaritalStatus, MarriageDate, MicrosoftAccount, MiddleName, MobileAgreementStatus, MobileNo, MOMEmployeeType, MOMOccupationGroup, MSOCode, NameExtension, NamePrefixCode, NationalityCode, NewGraduate, NoticePeriodForTerminationOfEmployment, OtherMedicalBenefit, OvertimePaymentPeriod, OvertimeRateOfPay, PaidMedicalExaminationFee, Password, PasswordDate, PasswordLetter, PasswordPayslip, PasswordQuestionAnswer, PasswordQuestionName, PasswordResetOn, PersonalEmail, PersonalMobileNo, PreviousEC, ProbationPeriod, ProbationPeriodType, ProbationSalary, PRRenounceDate, QualificationCode, RaceCode, RecruitmentType, Rehire, ReligionCode, ResignReasonCode, RestDayPerWeek, RetireAge, RetireDate, SalaryArrears, SalaryDate, ServiceLengthAdjustment, SeverancePayment, Suspended, TaxMethod, TaxNo, TelephoneNo, Title, UnionCode, UnionDateEnd, UnionDateStart, UnionMembershipNo, WDAEducationQualification, WebRoleCode, WindowsAccount, WorkDaysPerWeek, WorkExperience, WorkExperienceAdjustment, WorkHoursPerDay, WorkHoursPerYear, WorkingVisa</p>
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Excel Fields	<p>Mandatory: EmployeeCode, IdentityNo, DateStart</p> <p>Optional: IdentityNo, CompanyCode, CostCentreCode, DepartmentCode, DesignationCode, EmploymentTypeCode, LocationCode, TestingCharacter01[OF0C01], [OF0C02], [OF0C03], [OF0C04], [OF0C05], [OF0C06], [OF0C07], [OF0C08], [OF0C09], [OF0C10], TestingNumeric01[OF0N01], [OF0N02], [OF0N03], [OF0N04], [OF0N05], Category[OF0R01], Classification[OF0R02], Section[OF0R03], EmployeeType[OF0R04], HMOCoverage[OF0R05], ProjectFunction[OF0R06], Test03[OF0R7], [OF0R8], [OF0R9], Project[OF0R10], [OF0R11], [OF0R12], [OF0R13], [OF0R14], [OF0R15], [OF0R16], [OF0R17], [OF0R18], [OF0R19], [OF0R20], [OF0R21], [OF0R22], [OF0R23], [OF0R24], [OF0R25], [OF0R26], [OF0R27], [OF0R28], [OF0R29], [OF0R30], [OF0S01], [OF0S02], [OF0S03], [OF0S04], [OF0S05], StatusChangeReasonCodes</p>
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4. Under **Step 1**, select **Update from Excel** and **Employee Master** or **Org Structure** **Detail on Step 2** depending on which is to update. Click on **Browse** and select the upload template.

Append Employee

Step 1 ▼

Update from Excel

Step 2 ▼

Employee Master

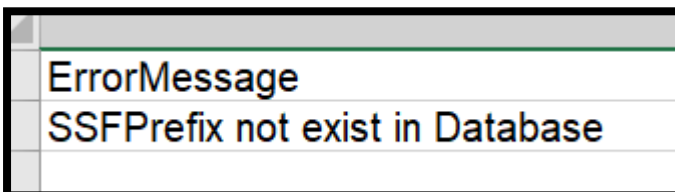
Step 3

Uploaded Files

Excel File ✖ Browse

Upload

5. Click on **Upload**.
6. Click on **Next** Button. If template has an error, it will display in red font and automatically downloads an excel error file. Correction should be made in the template upload and submit for re-upload.



7. If no error occurred during the upload, this would enable the **Import** button. Once clicked, the records will be saved in the database.



Employee Personal

Personal tab is used to enter/edit the basic information of employee. User will key in manually the details per field. Though this is a straightforward details form, there are important fields to take note of as listed below.

Access: Personnel Module > Personnel > Employee

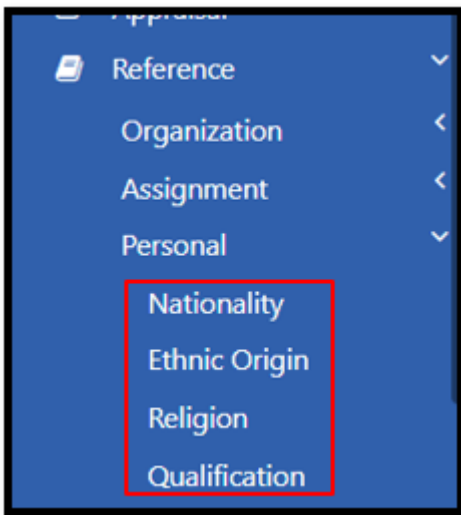
- Full Name Field – This auto-populates after User enters First Name and Last Name. The order sequence of Full Name can be changed since different countries have its own pattern. This can be changed in:

Access: System > Config > Base > Section: Parameter

The screenshot shows a configuration window for a parameter named 'EmployeeName'. The 'Value' field contains the format string '{0} {2} {1} {4}'. The 'Description' field contains the text: 'The format of employee name, that is formed from the following variable: Use * to apply to all country. Delimiter is semi-colon (;)'. Below the description, a list of variables is provided: (0)=First name, (1)=Last name, (2)=Middle name, and (3)=Alias name. At the bottom right, there are 'Update' and 'Close' buttons.

- Nationality, Ethnic Origin, Religion, Qualification Field – These are drop-down buttons and the selections should be created in:

Access: Personnel Module > Reference > Personal



- Web Role – This is only applicable if the employee has access to Web System with a role. The configuration needs to be done in:

Access: Personnel Module > Setup > Security > Web Role

The screenshot shows the 'Web Role' configuration interface. At the top, there are fields for 'Code', 'Name', and 'Web Access'. Below these is a table with columns for 'Code', 'Name', and 'Web Access', showing a row for '#DEFAULT' with 'Default Role' and '#DEFAULT - Default access'. Underneath is the 'HR Operation Access Right' section, which includes a search bar and a list of system modules: System, Admin*, Attendance, Calendar*, Claim*, Commission*, Contract*, CRM*, Finance*, and Leave*.

This menu sets the User limitation to have access to other menus.

Mandatory Fields


Fields can be set to mandatory and will be indicated with *. To set field as mandatory, User must configure it under:

Access: Setup > Portal > Mandatory Reminder

Field Name	Type	Employee Range
Bank Account No	Field Reminder On Employee Master	((TbiEmployee.CompanyCode >= 'BIPOMY3' AND TbiEmployee.CompanyCode <= 'BIPOMY3'))
Bank Account No		(NOT (TbiEmployee.EmployeeName LIKE 'Test%'))
Bank Code		(NOT (TbiEmployee.EmployeeName LIKE 'Test%'))
Birth Date	Both Options	(NOT (TbiEmployee.EmployeeName LIKE 'Test%'))
Work Calendar	Both Options	(NOT (TbiEmployee.EmployeeName LIKE 'Test%'))
Work Calendar	Both Options	(NOT (TbiEmployee.EmployeeName LIKE 'Test%'))
Company	Both Options	(NOT (TbiEmployee.EmployeeName LIKE 'Test%'))
Country/Region	Both Options	(NOT (TbiEmployee.EmployeeName LIKE 'Test%'))
CPFMethodCode	Both Options	((TbiEmployee.IdentityType >= 'SG01' AND TbiEmployee.IdentityType <= 'SG02'))
Salary Currency	Both Options	(0=0)
Employee Code	Mandatory Reminder On Welcome Page	(0=0)
Employee Name	Both Options	(0=0)
EPFNo	Both Options	((TbiEmployee.CountryCode >= 'MY' AND TbiEmployee.CountryCode <= 'MY'))
First Name	Field Reminder On Employee Master	(0=0)

Field Name: First Name
 Employee Range: (0=0)
 Type: Field Reminder On Employee Master

Buttons: Update, Delete, Close

1. Choose the Field Name to set as mandatory
2. Employee range should be set to (0=0) if it applies to all. Otherwise, click “” icon to specify an employee.
3. Type – should be set to “Field Reminder On Employee Master”.
4. Click Update to save.

Employee Employment


Employment tab is used to enter and modify the essential dates relating to employee's service duration to the company. It records the Join Date, Probation, Exit date and other important events used to track the overall employee working length.

Access: Personnel Module > Personnel > Employee

The screenshot shows the 'Employee' form with the 'Employment' tab selected. The form is divided into two columns of fields. The left column includes: Join Date (10/02/2017), Join Date for Leave, Initial Join Date (10/02/2017), Recruitment Type, New Graduate, Probation Period (0), Probation Period Type, Probation Due, Confirmed Date, Resignation Tender Date, Exit Date, Exit Reason, Exit Interview Date, Rehire, Severance Payment, and Previous Employee Code. The right column includes: Service Length Adjustment (0 yrs 00 mths), Service Length Total (2 yrs 00 mths), Previous Work Experience (0 yrs 00 mths), Work Experience To-Date (2 yrs 00 mths), No of Contract (0), Contract Adjustment (0), No of Contract Total (0), Last Working Date, Email (1@biposervice.com), Extension No, Mobile No, Telephone No (+65 8000 5555), Personal Email (@bipo.com), Personal Mobile No, and Buddy Employee. A small blue square icon with a white plus sign is located next to the 'Join Date' field.

Join Date

Follow the steps below in entering Employee Join Date:

1. Click configure “” icon. This will open a pop-up box.

The screenshot shows a pop-up window titled 'Employee Hire : 1 - Employee 1.1'. The window has a table with columns: Join Date, Resignation Tender Date, Exit Date, Exit Reason, Exit Interview Date, Resign Remarks, and Service Length. The 'Join Date' column contains '10/02/2017'. Below the table, there are fields for 'Join Date' (10/02/2017), 'Resignation Tender Date', 'Exit Date', 'Exit Reason' (Please select), 'Exit Interview Date', 'Resign Remarks', and 'Service Length' (checked). At the bottom, there are 'Update', 'Delete', and 'Close' buttons. Red circles with numbers 1 through 4 highlight the plus icon, the add button, the date field, and the Update button respectively.

2. Click the add “” icon to enter a Join Date.


Note: You can enter multiple Join Date as needed in certain scenarios. For example, an employee renewed a contract that indicates another join date of service.

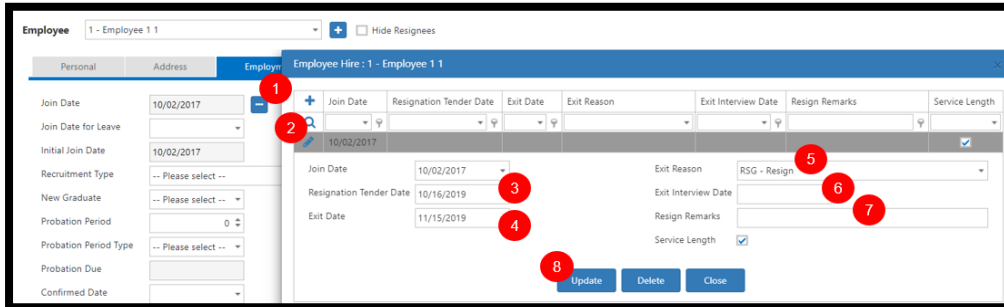
3. Specify the Join Date.
4. Click Update.

Join Date for Leave


The leave entitlement will start to accrue on the date indicated in this field. It overrides the Join Date in accruing leave. If this is blank, the system will follow the Join Date on when the employee will start to accrue leave.

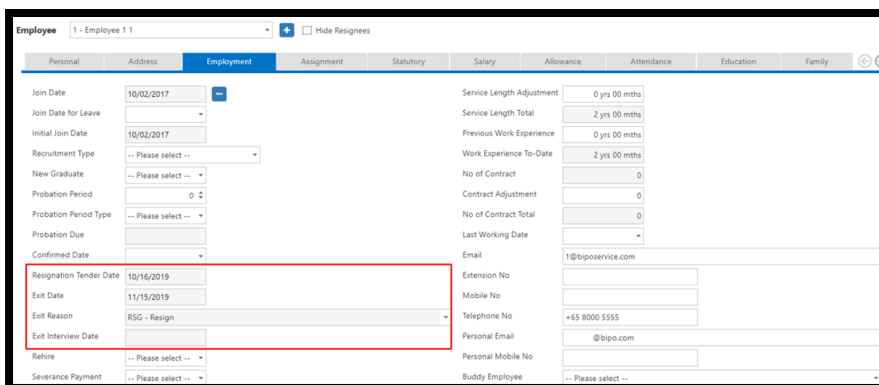
Resignation Tender Date, Exit Date and Exit Reason

1. Click configure “” icon. This will open a pop-up box.



The screenshot shows the 'Employee Hire' form for 'Employee 11'. A configuration pop-up box is open, allowing the user to edit the 'Join Date', 'Resignation Tender Date', 'Exit Date', and 'Exit Reason'. Red circles 1 through 8 indicate the following steps: 1. Click the configure icon (top left of the pop-up). 2. Click the edit icon (top left of the pop-up). 3. Enter the Resignation Tender Date (10/16/2019). 4. Enter the actual Exit Date (11/15/2019). 5. Select the Exit Reason (RSG - Resign). 6. Enter the Exit Interview Date. 7. Enter the Resign Remarks. 8. Click the Update button.

2. Click the edit “” icon. User must modify the existing Join Date.
3. Enter the Resignation Tender Date.
4. Enter the actual Exit Date of the employee to the company.
5. Exit Reason is a drop-down field. Choose from the selections given.
6. Exit Interview Date is an optional field. Enter the date if data if given for HR record purposes.
7. Resign Remarks is an optional field. This is a free text for comment section.
8. Click Update to save.



The screenshot shows the 'Employee' form with the 'Employment' tab selected. A red box highlights the following fields: Resignation Tender Date (10/16/2019), Exit Date (11/15/2019), Exit Reason (RSG - Resign), and Exit Interview Date. Other fields visible include Join Date (10/02/2017), Initial Join Date (10/02/2017), Recruitment Type, Probation Period, Probation Period Type, Probation Due, Confirmed Date, Service Length Adjustment, Service Length Total, Previous Work Experience, Work Experience To-Date, No of Contract, Contract Adjustment, No of Contract Total, Last Working Date, Email (1@biposervice.com), Extension No, Mobile No, Telephone No (+65 8000 5555), Personal Email (@bipo.com), Personal Mobile No, and Buddy Employee.

Upon entering the details, it will reflect in employment screen as highlighted above for the following fields.

Employment Tab Spare Fields

User can adjust the fields to be available under Employment tab. The Countries/Regions must be set to a specific country or * if it applies to all. This is also used to set the position of the field in the screen.

Access: Setup > Setting > Field Selection > Select: Employee Employment

Note: There are two “Employment” from the selection.

- Employee Employment – This refers to the Employment tab in Employee Master
- Employee Profile – Employment – This refers to the Employee Profile Report in Personnel



Field Selection						
Select Employee Employment						
No.	Field	Countries/Regions	Width In Pixel	Width In %	Position	
1	Join Date	*	120	0	Left	
2	Join Date for Leave	*	120	0	Left	
3	Initial Join Date	*	120	0	Left	
6	Recruitment Type	*	200	0	Left	
7	New Graduate	*	120	0	Left	
8	Probation Period	*	120	0	Left	
9	Probation Period Type	*	120	0	Left	
10	Probation Due	*	120	0	Left	
11	Confirmed Date	*	120	0	Left	
12	Resignation Tender Date	*	120	0	Left	
13	Exit Date	*	120	0	Left	
14	Exit Reason	*	0	100	Left	
15	Exit Interview Date	*	120	0	Left	
16	Rehire	*	120	0	Left	
17	Severance Payment	AU,CN,HK,ID,IN,JP,KH,KR,MM,MO,MY,NZ,PH,TH,TW,US,VN	120	0	Left	
18	Previous Employee Code	*	120	0	Left	
19	Microsoft Account	*	0	100	Left	
20	Google Account	*	0	100	Left	
21	Facebook Account	*	0	100	Left	
22	Service Length Adjustment	*	120	0	Right	

Employee Assignment

Employee Assignment is used to tag employees to their corresponding Org Structure, Leave Grade, Pay Group and Manager.

Access: Personnel Module > Personnel > Employee > Assignment

Org Structure

Employee Org Structure defines the allocation of an employee in the organization. This is also used to tag employee Cost Centre, Location (if company having multiple sites) and employee's type of employment.

As seen from the sample below, there are 2 pages. This indicates that employee has a change in org structure.

Note that Users can add/delete from Spare Field menu.

Leave Grade

Leave Grade is used to assign a specific leave bucket to employees. The setting up of leave grade can be done in **Reference > Assignment > Leave Grade** menu. The actual leave entitlement for each leave grade is to be defined in the:

Leave module > Reference > Leave > Entitlement.

Pay Group

Pay Group is used to identify the employee Payroll Grouping needed in payroll processing. As a sample, if User process “M – Singapore Payroll”, then this employee would be included in the run. It is essential as it is impacting the processing of employee’s pay and the inclusion of every pay run. Pay Group can be setup under **Reference > Assignment > Pay Group.**

Manager

Manager section is used to identify the employee’s reporting line manager. The list of Manager from the drop-down list are all stored employees in the company records. The selection of Manager Type can be setup under **Reference > Assignment > Manager Type.**

Employee Statutory

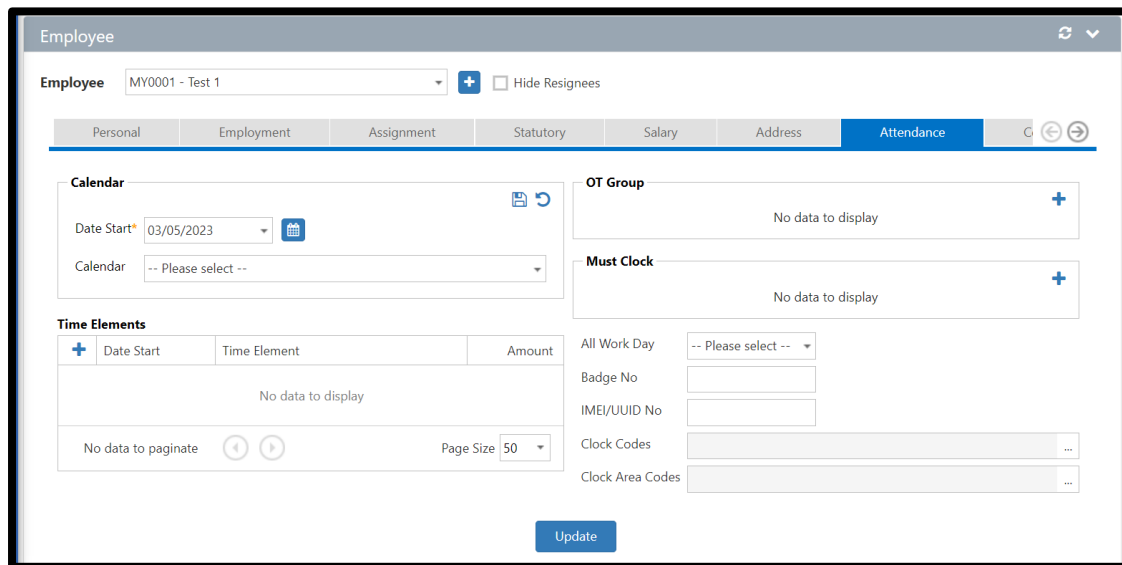
Employee Statutory is a dedicated tab to store employee statutory records and to include in processing as part of government mandated law.

For Country/Region Statutory, kindly visit [Country Statutory User Guide](#).

Employee Calendar

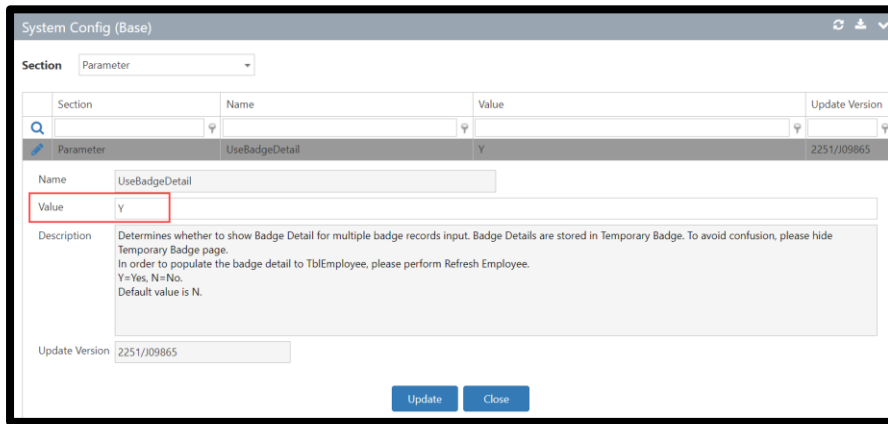
Employee Calendar is used to assign employees to follow specific working schedule. This information is needed for payroll purposes as employees will not be included in the run if this information is missing. The accurate tagging of employee's Calendar is important to operations and payroll to accordingly pay them based on their worked service. It also helps the company in terms of planning and makes tracking of labor cost efficient.

Access: Personnel Module > Personnel > Employee > Attendance Tab



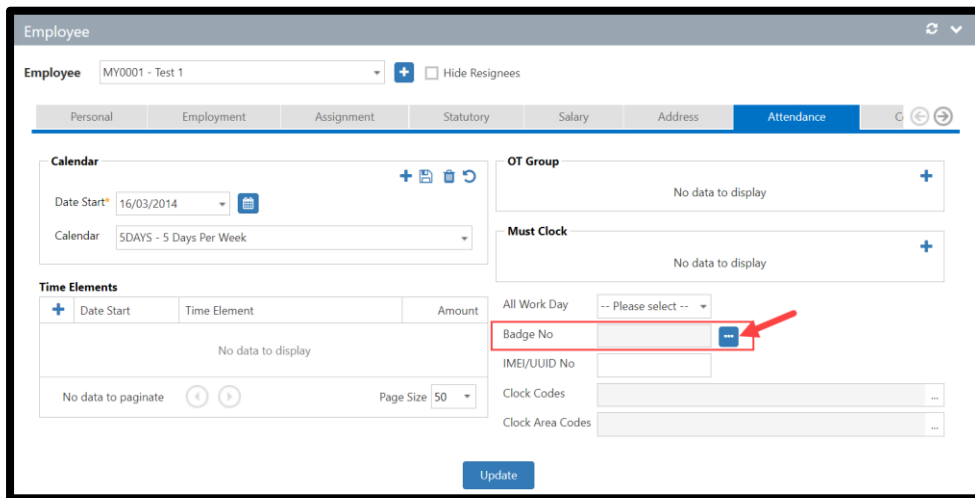
There is config that allows user to store multiple Badge No. This config will be applicable when there is scenario that employee reuse Badge No (Employee A resign and give badge no to Employee B). By enabling this config, the system can cater duplicate Badge No case and system will get the active Badge No by comparing Badge No date start with refresh employee date.


Access: System > Config > Base > Parameter > UseBadgeDetail

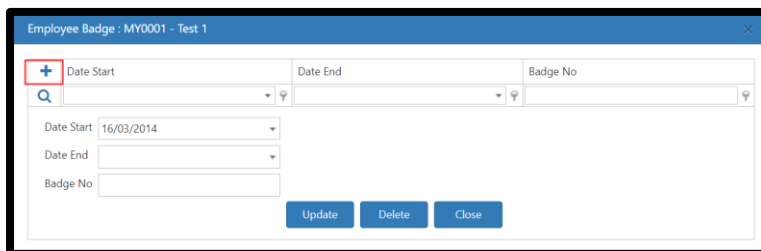


1. Set the value for this config as Y.

Access: Personnel Module > Personnel > Employee > Attendance



2. Badge No field under employee master will have an additional button , click on this button.
3. A pop-up screen as below appear:



4. Fill up accordingly and click **Update** button.
- Note:** This config support Append Employee.

Append Employee

Step 1 Append from Excel

Step 2 Badge No Detail Include Resignee

Step 3

Uploaded Files

Excel File

Upload

Excel Fields Mandatory: EmployeeCode, IdentityNo, DateStart, BadgeNo
Optional: DateEnd

Configuring & Assigning Employee Calendar

Follow the steps below in configuring and assigning employee calendar:

1. Click the add “ + ” icon to enter calendar record.
2. Date Start – Select the Date Start usually the Join Date of employee.
3. Working Pattern – This is only applicable to China, Taiwan, Macao.
4. Calendar – Drop-down field that should be setup under:

Access: Personnel Module > Reference > Assignment > Calendar

Code Allow Shift Change

Name **KET Details of Working Hours**

Country Codes

Nature

Cycle Start

+ <input type="button" value="Add"/>	Day No	Shift	Day Weight
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	1	S1000_1900 - 10 To 7	1.00
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	2	S1000_1900 - 10 To 7	1.00
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	3	S1000_1900 - 10 To 7	1.00
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	4	S1000_1900 - 10 To 7	1.00
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	5	S1000_1900 - 10 To 7	1.00
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	6	OFF - OFF	0.00
<input type="button" value="Edit"/> <input type="button" value="Delete"/>	7	REST - REST	0.00

Page 1 of 1 (7 items) Page size:

User can create Calendar to assign to every employee depending on how their contract and arrangements dictate. User can also specify the day weight to match the proper calculation of days the employee worked. Calendar Pattern should be setup to be selected.

Salary Setup

Salary Setup is used to set the percentage, amount, salary currency and remaining salary of employee to allocated bank accounts/s.

Configuration

“UseBankDetail” config is used to allow user to input multiple bank allocation record for employee.

If value is set to:

- **N** – User can input 1 to 2 bank allocation record
- **Y** – Use can input 2 or more bank allocation record

Access: System > Config > Base > Section: Parameter > “UseBankDetail”

System Config (Base)			
Section		Parameter	
	Section	Name	Value
	<input type="text"/>	<input type="text" value="usebank"/>	<input type="text"/>
	Parameter	UseBankDetail	*=Y, SG=N, MY=Y,

Bank Allocation Records

If **“UseBankDetail”** is set to **N**, the interface below will be displayed to enter 1 to 2 bank allocation record/s.

Access: Personnel Module > Personnel > Employee > Salary Tab

Work Days Per Week	<input type="text" value="7.00"/>																		
Work Hours Per Day	<input type="text" value="8.00"/>																		
Work Hours Per Year	<input type="text" value="2,080.00"/>																		
Work Days Per Year	<input type="text" value="0.00"/>																		
Salary Arrears	-- Please select --																		
Freeze Payment	-- Please select --																		
	<table border="0"> <tr> <td></td> <td>1st Account</td> <td>2nd Account</td> </tr> <tr> <td>Bank Code</td> <td><input type="text" value="0005 - BPI"/></td> <td><input type="text" value="0006 - Citibank"/></td> </tr> <tr> <td>Bank Branch</td> <td>-- Please select --</td> <td>-- Please select --</td> </tr> <tr> <td>Bank Account No</td> <td><input type="text" value="89898989898"/></td> <td><input type="text" value="12312312"/></td> </tr> <tr> <td>Beneficiary Name</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>Bank Currency</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </table>		1st Account	2nd Account	Bank Code	<input type="text" value="0005 - BPI"/>	<input type="text" value="0006 - Citibank"/>	Bank Branch	-- Please select --	-- Please select --	Bank Account No	<input type="text" value="89898989898"/>	<input type="text" value="12312312"/>	Beneficiary Name	<input type="text"/>	<input type="text"/>	Bank Currency	<input type="text"/>	<input type="text"/>
	1st Account	2nd Account																	
Bank Code	<input type="text" value="0005 - BPI"/>	<input type="text" value="0006 - Citibank"/>																	
Bank Branch	-- Please select --	-- Please select --																	
Bank Account No	<input type="text" value="89898989898"/>	<input type="text" value="12312312"/>																	
Beneficiary Name	<input type="text"/>	<input type="text"/>																	
Bank Currency	<input type="text"/>	<input type="text"/>																	
Allocation Type	Percentage																		
Allocation Amount	<input type="text" value="50.00"/>																		
Allocation Account	1st Bank Account																		
Allocation Run	All Runs																		

If “*UseBankDetail*” is set to **Y**, the interface below will be displayed to enter 2 or more bank allocation records.

Address	CSR Record	Employment	Contract	Assignment		
Work Days Per Week	<input type="text" value="7.00"/>					
Work Hours Per Day	<input type="text" value="8.00"/>					
Work Hours Per Year	<input type="text" value="2,080.00"/>					
Work Days Per Year	<input type="text" value="0.00"/>					
Salary Arrears	<input type="text" value="-- Please select --"/>					
Freeze Payment	<input type="text" value="-- Please select --"/>					
Bank Detail						
Date Start	<input type="text" value="01/10/2018"/>					
<input type="button" value="+"/>	<input type="button" value="🗑"/>	<input type="button" value="🔄"/>				
Country/Region	Bank Code	Bank Account No	Allocation Type	Allocation Amount	Allocation Run	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="button" value="🔍"/>	<input type="button" value="📍"/>	<input type="button" value="📍"/>	<input type="button" value="📍"/>	<input type="button" value="📍"/>	<input type="button" value="📍"/>	
<input type="button" value="✎"/>	PH	0006	12312312	Percentage	50.00	All Runs
<input type="button" value="✎"/>	PH	0005	89898989898	Percentage	50.00	All Runs
Page 1 of 1 (2 items)					Page Size 10	

1. **Bank Code** – Select the **Bank Code** of employee. This can be setup in **Reference > Statutory > Bank**.
2. **Bank Branch** – Select the **Bank Branch** of the **Bank Code**. This can be setup in **Reference > Statutory > Bank**.
3. **Bank Account No** – Enter the employee bank account no.
4. **Beneficiary Name** – Enter the employee **Beneficiary Name** if needed.
5. **Bank Currency** – Select the bank currency. If left blank, this will default to the **Pay Group Setup**.
6. **Allocation Type** – Select if:
 - Percentage
 - Amount
 - Currency
7. **Allocation Amount** – The **Allocation Amount** corresponds to the selected **Allocation Type**.
8. **Allocation Account** – Select if 1st or 2nd Bank account. The remaining percentage, amount or other currency will be allocated to the other bank account.
9. **Allocation Run** – Select if the allocation is applicable to:
 - All Runs
 - Salary Runs
 - Separate Runs

Calendar Pattern

Calendar Pattern should be setup under:

Access: Personnel Module > Reference > Assignment > Shift

The screenshot shows a configuration form for a Calendar Pattern. The form is organized into several sections:

- Code:** S1000_1900
- Name:** 10 To 7
- Country/Region:** Singapore
- Nature:** (Dropdown menu)
- Type:** Full Day
- Allow Half-Day Leave:** Yes
- Allow Leave:** Yes
- Normal Start:** 10:00
- Normal End:** 19:00 (with a 'Next Day' checkbox)
- Normal Hours:** 9.00
- Employee Range:** (Large empty text area)
- 1st Half End:** (Dropdown menu) with a 'Next Day' checkbox
- 1st Half Hours:** 0.00
- 2nd Half Start:** (Dropdown menu) with a 'Next Day' checkbox
- 2nd Half Hours:** 0.00

At the bottom of the form are three buttons: **Update**, **Delete**, and **Close**.

This will only be visible in Calendar menu after configuration.

Detail Information

Detail Information menu is used to store employee record important information into the system. Some information will also reflect in Employee Master while others are only available in this menu. The sub-menus under Detail are:

- Address
- Allowances
- Appraisal
- Attachment
- Certificate
- Contract
- Cost Centre
- Development Plan
- Education
- Emergency
- Family
- Loan
- Misconduct
- Note
- Secondment
- Work Experience

Access: Personnel Module > Personnel > Details

Address

Employee address can also be entered in this menu aside from employee master.

Multiple address can be stored by clicking the add “ + ” icon.

User can enter different address types such as:

- Local
- Overseas
- Mailing
- Registered Residence

Once saved (by clicking Update), it will reflect in Employee Master as well.

Allowances

Employee Allowances is also used to enter allowances aside from the allowances tab which will also reflect in Employee Master under Allowances tab.

If there is no Date End specified, it indicates that the allowance is recurring and can only be stopped if Date End is provided.

Run Type – This is the schedule of when the allowance will be paid to employee:

- Both 1st and 2nd Half
- 1st Half Month
- 2nd Half Month

These three selections enable another field to identify if the amount will be paid in full on half month value.

The screenshot shows a form with the following fields:

- Currency: SGD
- Run Type: Both 1st and 2nd Half
- Pay Batch: (empty)
- Last Update By: hrm - 17/10/2019 (Thu)

 A dropdown menu is open next to the Run Type field, showing options:

- Full Month Value (highlighted)
- Please select --
- Full Month Value
- Half Month Value

- Whole Month
- Separate – Only to pay if running Separate run.

Appraisal


Appraisal is used to record employee appraisal all throughout the employee’s work service in the company. The figures indicated in this menu does not affect the salary nor payroll, thus only used for record purposes.

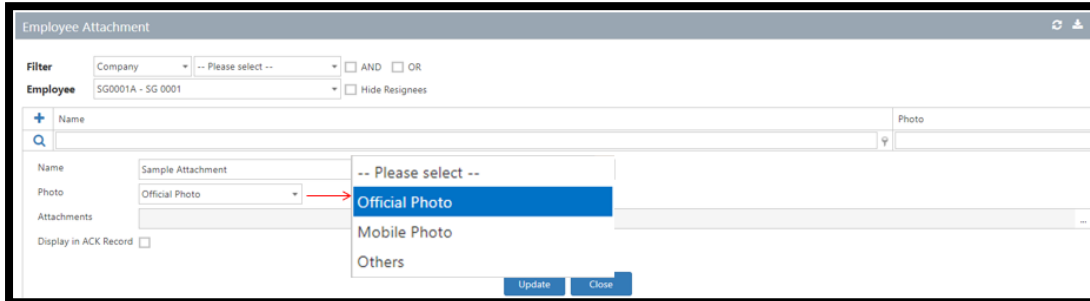
The screenshot shows the 'Employee Appraisal' form with the following details:

- Filter: Company (dropdown), -- Please select -- (dropdown), AND/OR (checkboxes)
- Employee: SG0001A - SG 0001 (dropdown), Hide Resignees (checkbox)
- Date Start: 17/10/2019
- Date End: (empty)
- Appraisal Type: Sample
- Score: 95.00 / 100.00 = 95.00 %
- Rating: Sample Rating
- Bonus Quantum: 5,000.00
- Bonus Amount: 5,000.00
- Reviewer: 001 - David Teo
- Remarks: (empty text area)

 Buttons at the bottom: Update, Delete, Close.

Attachment

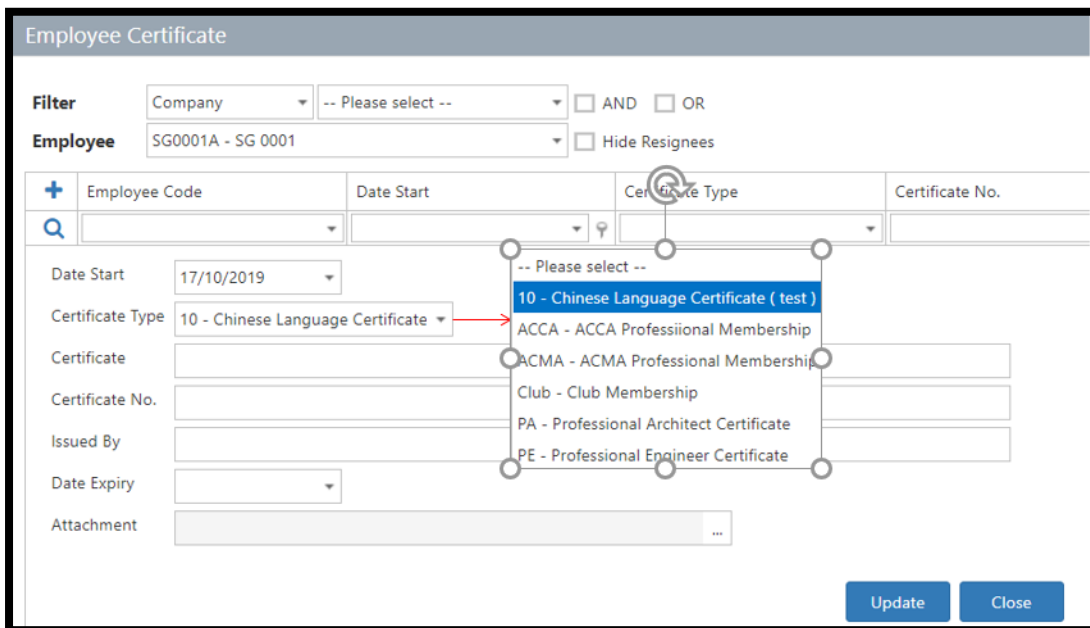
Attachment is used as repository of Official Photo, Mobile Photo or Others in employee profile. User can click on “” icon to attach.



If Display in ACK Record is ticked, the attachment will be available in **Administration Module > Document > Document ACK Record**.

Certificate

Certificate is used to store the employee certificate as part of requirement for certain positions. These certificates were submitted by employees and HR/ User can save these as part of their reference.



User can add certificate types by setting it under **Personnel Module > Reference > Personal > Personal Cert Type**.

Contract

Contract is used to store employee contract for HR record purposes.

Cost Centre

Cost Centre is used for employee cost allocation. This menu is also used to enter split costing for an employee. Split costing should be tallied to 100% if combined.

Date Start	Allocation Type	Cost Centre	Percentage
17/10/2019		0000066146 - 0000066146	30.00
17/10/2019		0000077508 - 0000077508	70.00

Setting up Cost Centre can be done in **Personnel Module > Reference > Organization > Cost Centre.**

Development Plan

Development Plan is used to tag an employee to a development plan in a fiscal year.

The Development Plan refers to the agenda of employee development.

Education

Education is used to store employee education details that will also reflect in employee master under Education tab.

The screenshot shows the 'Employee Education' form. At the top, there are filter options for 'Company' (set to '-- Please select --') and 'Employee' (set to 'SG0001A - SG 0001'). There are checkboxes for 'AND/OR' and 'Hide Resignees'. Below the filters is a table with the following data:

Qualification	Major
BA - Bachelor Degree	19 - Electrical Engineering
DP - Diploma	45 - Marketing
PC - Professional Certification	22 - Engineering Management

At the bottom of the table, it says 'Page 1 of 1 (3 items)' with navigation arrows.

Emergency

Emergency is used to record the employee's kin contact details in case of emergency.

The screenshot shows the 'Employee Emergency' form. It has the same filter options as the Education form. The form fields are filled with the following information:

- Contact Name: Stephanie
- Relationship: Spouse
- Address Line 1: 123, Bridge Road
- Address Line 2: (empty)
- Address Line 3: (empty)
- Gender: Female
- City / Postal Code: 823176
- Country/Region: SG - Singapore

There are 'Update' and 'Close' buttons at the bottom right.

User can add a selection in Relationship field under **Personnel Module > Reference > Personal > Relationship**.

Family

Family is used to record the employee family details. Information entered in this menu will also be available in Employee Master, Family tab.

Loan

Multiple loans can be tracked for each employee and these can be interfaced into payroll for repayment(s) to be deducted from the salary.

Payment Month	Principal Amount	Interest Amount	Total Amount	Paid	Paid (2nd Half)	Pay Runs	Remarks
2019-03	10,000.00	416.67	10,416.67	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	PH2019-03-01 (B1/5,000.00/208.34)	
2019-03	10,000.00	416.67	10,416.67	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	PH2019-03-03 (B2/5,000.00/208.33)	
2019-04	10,000.00	416.67	10,416.67	<input type="checkbox"/>	<input type="checkbox"/>		
2019-05	10,000.00	416.67	10,416.67	<input type="checkbox"/>	<input type="checkbox"/>		
2019-06	10,000.00	416.67	10,416.67	<input type="checkbox"/>	<input type="checkbox"/>		
2019-07	10,000.00	416.67	10,416.67	<input type="checkbox"/>	<input type="checkbox"/>		
2019-08	10,000.00	416.67	10,416.67	<input type="checkbox"/>	<input type="checkbox"/>		
2019-09	10,000.00	416.67	10,416.67	<input type="checkbox"/>	<input type="checkbox"/>		
2019-10	10,000.00	416.67	10,416.67	<input type="checkbox"/>	<input type="checkbox"/>		
2019-11	10,000.00	416.67	10,416.67	<input type="checkbox"/>	<input type="checkbox"/>		
2019-12	10,000.00	416.67	10,416.67	<input type="checkbox"/>	<input type="checkbox"/>		

Loan Type	Drop-down list of Loan for selection. User can type in the new loan type name. Once you save this record successfully, system will add to the list for future use.
Loan Date	Starting Payment of Loan
Loan Reference No	The values here will be updated in Payroll Transactions Reference Number during processing
Description	Loan Description
Guarantors	Guarantors of the Loan
Principal Amount	Loan total amount
Interest Formula	See table below

Installment Months	Number of splitting months
Interest Rate	Interest rate percentage
Total Loan	Principal Amount + Principal Rate
Interest Amount	Total interest amount based on interest rate
First Payment	First payment date
Bi-Monthly Payment	<ul style="list-style-type: none"> • 1st Half • 2nd Half <p>Both</p>
First Installment Principal	Total amount of first installment
Last Installment Principal	Total amount of last installment
Remarks	This field is optional
Last Update By:	Edit history

Loan - Interest Formula

Loan Type	Study Loan		
Loan Date	01/03/2019		
Loan Reference No	1234567890		
Description	Study Loan		
Guarantors			
Principal Amount	100,000.00	Interest Formula	Straight Line
Installment Months	10	Interest Rate	-- Please select --
Total Loan	104,166.67	Interest Amount	Straight Line
First Payment	2019-03	Bi-Monthly Payment	Reducing Balance
First Installment Principal	0.00	First Installment Interest	0.00
Last Installment Principal	0.00	Last Installment Interest	0.00
Remarks			

Straight Line	Straight Line is to separate the loan details equally
Reducing Balance	Combination with Interest Amount
Reducing Interest	Principal Amount is divided equally but the interest starting with more then get lesser each month

Sample Straight Line

+	Payment Month	Principal Amount	Interest Amount	Total Amount	Paid	Paid (2nd Half)	Pay Runs	Remarks
	2019-03	10,000.00	416.67	10,416.67	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	PH2019-03-01 (B1/5,000.00/208.34) PH2019-03-03 (B2/5,000.00/208.33)	
	2019-04	10,000.00	416.67	10,416.67	<input type="checkbox"/>	<input type="checkbox"/>		
	2019-05	10,000.00	416.67	10,416.67	<input type="checkbox"/>	<input type="checkbox"/>		
	2019-06	10,000.00	416.67	10,416.67	<input type="checkbox"/>	<input type="checkbox"/>		
	2019-07	10,000.00	416.67	10,416.67	<input type="checkbox"/>	<input type="checkbox"/>		
	2019-08	10,000.00	416.67	10,416.67	<input type="checkbox"/>	<input type="checkbox"/>		
	2019-09	10,000.00	416.67	10,416.67	<input type="checkbox"/>	<input type="checkbox"/>		
	2019-10	10,000.00	416.67	10,416.67	<input type="checkbox"/>	<input type="checkbox"/>		
	2019-11	10,000.00	416.67	10,416.67	<input type="checkbox"/>	<input type="checkbox"/>		
	2019-12	10,000.00	416.67	10,416.67	<input type="checkbox"/>	<input type="checkbox"/>		

Page 1 of 1 (10 items) Page size: 100

Sample Reducing Balance

+	Payment Month	Principal Amount	Interest Amount	Total Amount	Paid	Paid (2nd Half)	Pay Runs	Remarks
	2019-03	9,813.93	416.67	10,230.60	<input type="checkbox"/>	<input type="checkbox"/>		
	2019-04	9,854.82	375.78	10,230.60	<input type="checkbox"/>	<input type="checkbox"/>		
	2019-05	9,895.89	334.71	10,230.60	<input type="checkbox"/>	<input type="checkbox"/>		
	2019-06	9,937.12	293.48	10,230.60	<input type="checkbox"/>	<input type="checkbox"/>		
	2019-07	9,978.52	252.08	10,230.60	<input type="checkbox"/>	<input type="checkbox"/>		
	2019-08	10,020.10	210.50	10,230.60	<input type="checkbox"/>	<input type="checkbox"/>		
	2019-09	10,061.85	168.75	10,230.60	<input type="checkbox"/>	<input type="checkbox"/>		
	2019-10	10,103.78	126.82	10,230.60	<input type="checkbox"/>	<input type="checkbox"/>		
	2019-11	10,145.87	84.73	10,230.60	<input type="checkbox"/>	<input type="checkbox"/>		
	2019-12	10,188.12	42.44	10,230.56	<input type="checkbox"/>	<input type="checkbox"/>		

Page 1 of 1 (10 items) Page size: 100

	Principal	Interest	Total
Total	100,000.00	2,305.96	102,305.96
Outstanding	100,000.00	2,305.96	102,305.96

Sample Reducing Interest

	+	Payment Month	Principal Amount	Interest Amount	Total Amount	Paid	Paid (2nd Half)	Pay Runs	Remarks
		2019-03	10,000.00	416.67	10,416.67	<input type="checkbox"/>	<input type="checkbox"/>		
		2019-04	10,000.00	373.26	10,373.26	<input type="checkbox"/>	<input type="checkbox"/>		
		2019-05	10,000.00	330.04	10,330.04	<input type="checkbox"/>	<input type="checkbox"/>		
		2019-06	10,000.00	287.00	10,287.00	<input type="checkbox"/>	<input type="checkbox"/>		
		2019-07	10,000.00	244.14	10,244.14	<input type="checkbox"/>	<input type="checkbox"/>		
		2019-08	10,000.00	201.45	10,201.45	<input type="checkbox"/>	<input type="checkbox"/>		
		2019-09	10,000.00	158.95	10,158.95	<input type="checkbox"/>	<input type="checkbox"/>		
		2019-10	10,000.00	116.62	10,116.62	<input type="checkbox"/>	<input type="checkbox"/>		
		2019-11	10,000.00	74.47	10,074.47	<input type="checkbox"/>	<input type="checkbox"/>		
		2019-12	10,000.00	32.49	10,032.49	<input type="checkbox"/>	<input type="checkbox"/>		

Page 1 of 1 (10 items) 1 Page size: 100

	Principal	Interest	Total
Total	100,000.00	2,235.09	102,235.09
Outstanding	100,000.00	2,235.09	102,235.09

After processing in Payroll, the "Pay Runs" will be populated by a stamp consisting of:

- "Pay Run ID" followed Run Type:
 - B1 - first half amount and 50% interest for the whole month
 - B2 - 2nd half amount and 50% interest for the whole month
- For monthly payment - The total amount and total interest will be shown.

	+	Payment Month	Principal Amount	Interest Amount	Total Amount	Paid	Paid (2nd Half)	Pay Runs	Remarks
		2019-03	10,000.00	416.67	10,416.67	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	PH2019-03-01 (B1/5,000.00/208.34) PH2019-03-03 (B2/5,000.00/208.33)	
		2019-04	10,000.00	416.67	10,416.67	<input type="checkbox"/>	<input type="checkbox"/>		

****Important Note:** For any manual adjustments done in the respective pay run, the Principal Amount and the Interest Amount must be adjusted in the Employee Loan Record manually as well so that the correct outstanding balance can be displayed.

Misconduct

Misconduct is used to record employee behavioral case for HR reference.

Employee Misconduct

Filter: Company [-- Please select --] AND OR

Employee: SG0001A - SG 0001 Hide Resignees

+	Offence Date	Offence Type	Offence Description
🔍			
🔧	17/10/2019	Sample Offense	

Offence Date: 17/10/2019

Offence Type: Sample Offense

Offence Description: [Text Area]

Action Date: 09/10/2019

Action Type: [Dropdown]

Action Description: [Text Area]

Remarks: [Text Area]

Note

Note is used to attach any document and take note of any reference for record keeping.

Employee Note

Filter: Company [-- Please select --] AND OR

Employee: SG0001A - SG 0001 Hide Resignees

+	Date Start	Date End	Type	Note
🔍				

Date Start: [Dropdown]

Date End: [Dropdown]

Type: sam-sample note

Attachments: [Dropdown]

Content: [Text Area]

Submit Cancel

Note type can be added under **Personnel Module > Reference > Personal > Note Type**.

Secondment

Secondment is used to enter any secondment details including additional Salary and Allowance if employee is tapped to take a temporary position. This will reflect in Employee Master, Secondment tab if this tab is enabled.

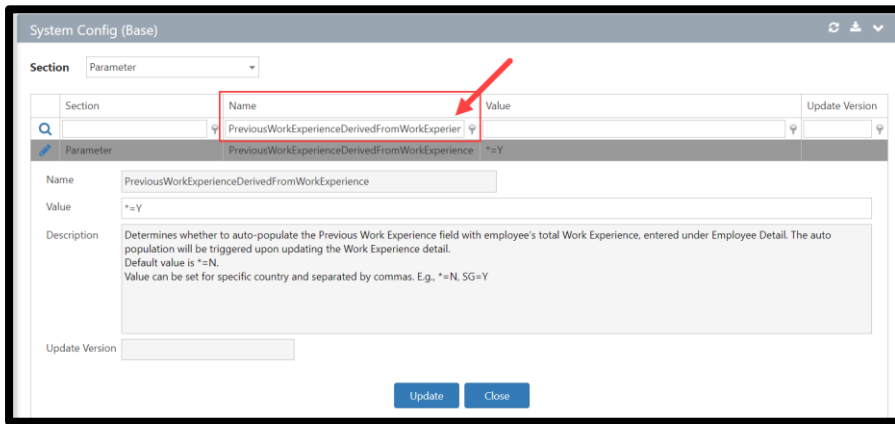
Work Experience

Work Experience is used to record employee working history as part of HR documentation.

There is config that allows user to auto-populate the value in Previous Work Experience field under Employee Master after user update the Work Experience details. Following is the steps of setup for this configuration:

Access: System > Config > Base > Section:Parameter

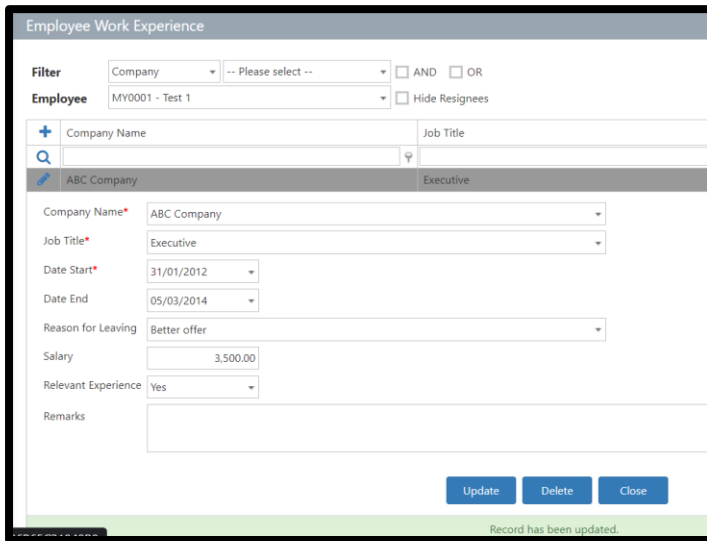
1. Search **PreviousWorkExperienceDerivedFromWorkExperience** under the **Name** column.



2. Update the value to Y if you wish to enable this config.
3. Once it is updated, the date that updated in Work Experience will be computed and auto populate under Previous Work Experience field.

Example:

HR admin updated the Work Experience for Employee as below:



If the config **PreviousWorkExperienceDerivedFromWorkExperience** value is set as **Y**, system will auto compute the value of **Date Start** and **Date End** in **Work Experience**, populate under **Previous Work Experience** field.

The screenshot shows the 'Employee' form with the 'Employment' tab selected. The 'Previous Work Experience' field is highlighted with a red box, and a red arrow points to it. Other fields include Join Date (16/03/2014), Service Length Adjustment (0 yrs 00 mths), and Work Experience Adjustment (0 yrs 00 mths).

Personal Status Change

Personal Status Change is used to modify employee details that will reflect in employee master data. This will display the original data and new data to show comparison.

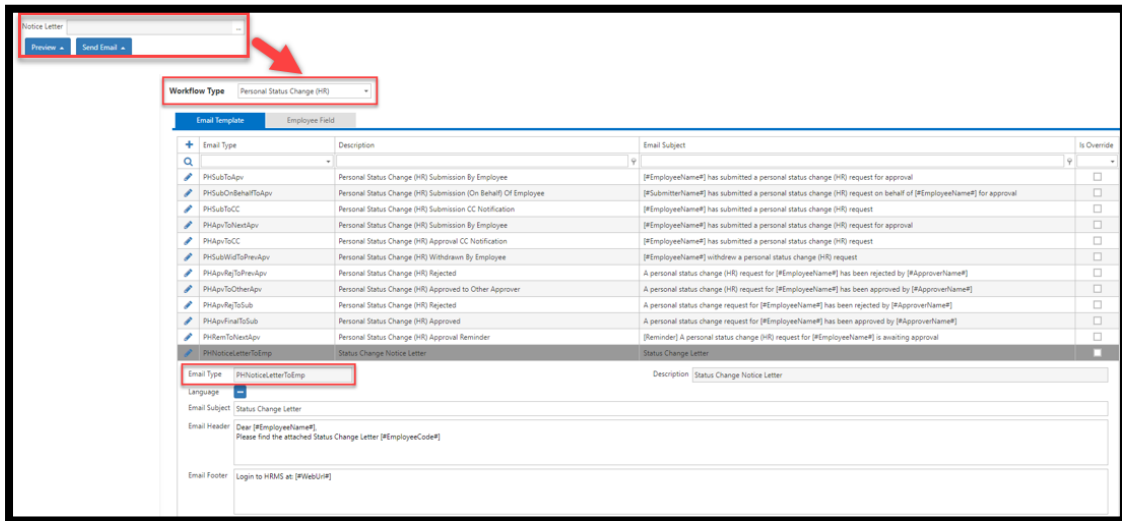
Access: *Personnel Module > Life Cycle > Personal Status > Change Record*

The screenshot shows the 'Status Change Record' form. It includes a filter section, a table of records, and a detailed comparison of original and modified data. The 'Original' data shows Date Start: 04-04-2018, Company: AT Testing SG, and Department: 123 - HR. The 'Modify To' data shows Date Start: 20-04-2022, Company: BIPO Singapore Pte Ltd, and Department: 01 - Sales2. The Status Change Reason is 'Testing Reason'.

Level	Name	Date	Action	Remarks
	admin - admin	20-04-2022 (Wed) 16:35:05	Submitted	
	admin - admin	20-04-2022 (Wed) 16:35:05	Approved	

The **Notice Letter** that is used as email notification for medication can be setup in:

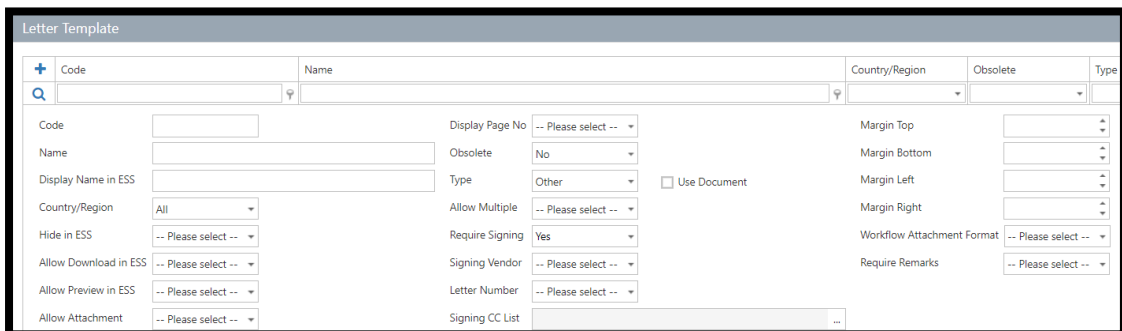
Access: *Setup > Workflow > Workflow Email > Workflow Type: Personal Status Change (HR) > PHNoticeLetterToEmp*



Letter Template

Letter Template is used to set up the letter contents and configurations to be sent to employees.

Access: *Personnel Module > Reference > Letter > Letter Template*



1. **Code** – Enter the **Code** of the letter template.
2. **Name** – Enter the **Name** of the letter template.
3. **Display Name in ESS** – Enter the template name to display in ESS.
4. **Country/Region** – Select which country this letter template will be available to. Select **All** if applies to all.
 - When Country/Region = 'CN' then Signing vendor selection will be **QiYueSuo**, **Basic E-Sign** and **QiYueSuo SaaS** for all **Letter Types** that need signing

The screenshot shows a configuration form for a Letter Template. The 'Country/Region' dropdown is set to 'China'. The 'Signing Vendor' dropdown is open, showing options: 'QiyueSuo', 'Basic E-Sign', and 'QiyueSuo SaaS'. Other fields include Code, Name, Display Name in ESS, Hide in ESS, Allow Download in ESS, Allow Preview in ESS, Allow Attachment, Display Page No, Obsolete, Type, Require Signing, Letter Number, and Signing CC List.

- When Country/Region <> 'CN' then Signing vendor selection will be **DocuSign** and **Basic E-Sign** for all **Letter Types** that need signing

The screenshot shows the same configuration form, but with 'Country/Region' set to 'Singapore'. The 'Signing Vendor' dropdown is open, showing options: 'DocuSign' (selected), 'Basic E-Sign', and 'DocuSign'. Other fields are the same as in the previous screenshot.

Note: If **DocuSign** is selected, the **Allow Void** will be enabled to allow user to void a letter that has been sent to **DocuSign** for E-Signature ceremony process.

The screenshot shows the configuration form with 'Country/Region' set to 'Singapore', 'Signing Vendor' set to 'DocuSign', and 'Allow Void' set to 'Yes'. The 'Allow Void' field is highlighted with a red box. Other fields include Code, Name, Display Name in ESS, Hide in ESS, Allow Download in ESS, Allow Preview in ESS, Allow Attachment, Display Page No, Obsolete, Type, Require Signing, Letter Number, Access Code, and Signing CC List.

When 'Allow Void' is set to yes, a void button will be visible in onboarding notice.

Access: Personnel Module > Life Cycle > Onboarding > Onboarding Notice

The screenshot shows the 'Onboarding Notice' interface. At the top, there are tabs for 'Address', 'Allowance', 'Attachment', 'Cost Center', 'Education', 'Emergency', 'Family', 'Identity', 'Manager', and 'Work Experience'. Below these is a form with fields for 'Address Type', 'Building Name', 'City', 'Country/Region', 'District', 'Floor No', 'House No', 'Address Line 1', and 'Address 2'. A search bar and a 'Local' button are also present. Below the form, there are 'Offer Letter' and 'Send Welcome Email' dropdowns, each with a 'Send Email' button. The main part of the interface is a table with the following data:

Document	Level	Signer	Email	Signed Date	Status	Reason	Action
offercompany	1	ID00100 - Testing Company		mm	Sent		
offercompany	2	ID0084 - Daniel		m	Created		
DocuSign Test	1	ID00100 - Testing Company		m	Sent		Void

At the bottom, there is a pagination bar showing 'Page 1 of 1 (3 items)' and a 'Page Size' dropdown set to '10'. An 'Employment Contract' dropdown is also visible at the bottom left.

When user click this void button, system will prompt the void reason:

The screenshot shows a 'Void Reason' dialog box. It has a title bar with a close button. The main content area contains the text 'Void Reason:' followed by a text input field. The input field contains the text 'Employee refuse to sign the contract'. Below the input field, it says 'Characters remaining : 164'. At the bottom of the dialog, there are two buttons: 'OK' and 'Cancel'.

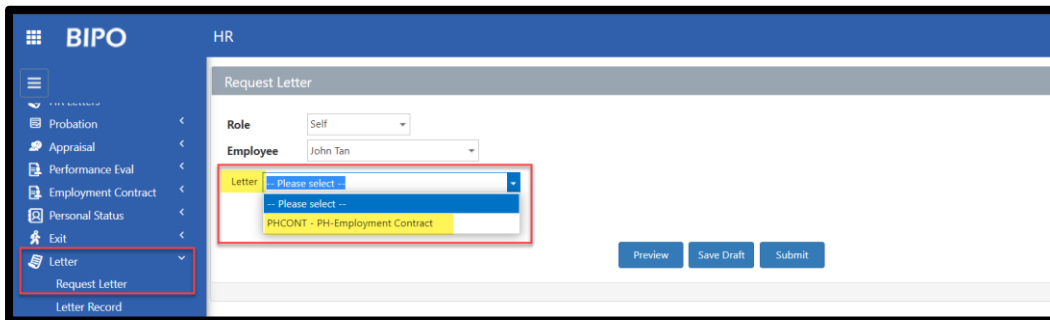
After voiding, system will update the letter grid with the given reason:

The screenshot shows the updated letter grid. The table now has the following data:

Document	Level	Signer	Email	Signed Date	Status	Reason	Action
offercompany	1	ID00100 - Testing Company		1	Sent		
offercompany	2	ID0084 - Daniel		1	Created		
DocuSign Test	1	ID00100 - Testing Company		1	Voided	Employee refuse to s	

The 'Reason' column for the 'DocuSign Test' row is highlighted with a red box. The pagination bar at the bottom shows 'Page 1 of 1 (3 items)' and 'Page Size' set to '10'.

5. **Hide in ESS** – Select **Yes** (the letter template will be hidden in ESS) or **No/Please Update** (the letter template will be shown in ESS), as shown:



6. **Allow Download in ESS** – Select from Yes, Yes – Approved Only or No if letter can be downloaded in ESS.
7. **Allow Preview in ESS** – Select from:
- Yes: ESS user will be able to see the Preview button in the Letter Request and Letter Record screen regardless of the approval status of the Letter.
 - Yes – Approved Only: ESS user will not be able to preview the letter during submission and pending approval. ESS user will only be able to preview the letter when it is fully approved.
 - No: ESS user will not be able to see the Preview button in the Letter Request and Letter Record screen.
8. **Allow Attachment** – Select **Required** (system will make it mandatory for attachment to this letter template) or **Optional/Not Available** (attachment will be optional for this letter template).
9. **Display Page No** – Select the positioning of the **Page No** in the letter.
10. **Obsolete** – Select **Yes** to disable. **No** to set as active.
11. **Type** – Selections from **Type Field** would vary the succeeding fields. Below are the Letter Type and mapping:

TYPE	DESCRIPTION
Contract Renewal	A letter Incorporated with e-Signature that can be used in Life Cycle > Contract > Contract Renewal .
Employee	A Notice Letter to be used in Life Cycle > Personal Letter > Send Letter .
Employee Contract	A letter Incorporated with e-Signature that can be used in Life Cycle > Onboarding > Onboarding Notice .

Exit	A letter that can be used in <i>Life Cycle > Offboarding > Exit Request.</i>
GDPR	A letter used to acknowledge <i>General Data Protection Regulation.</i>
Mobile Agreement	A letter used for acknowledgement that will appear in mobile after the employee logs in.
Note	A note letter that can be used in <i>Personnel > Details > Note.</i>
Offer Letter	A letter Incorporated with <i>e-Signature</i> that can be used in <i>Life Cycle > Onboarding > Onboarding Notice.</i>
Other	A letter Incorporated with <i>e-Signature</i> that can be used in <i>Personnel > Letter > Letter Request.</i> This <i>Letter Type</i> is used for letter template that require approval to assign signer.
Probation	A letter that can be used in <i>Personnel > Appraisal > Probation > Probation Record.</i>
PSC Notice	A letter used in <i>Life Cycle > Personal Status.</i>
e-Sign Document	A letter incorporated with <i>e-Signature</i> that can be used in <i>Life Cycle > e-Sign Document > Send e-Sign Document.</i>
Contract Detail	A letter used as Contract Detail. When <i>Use Document</i> checkbox is enabled, user will be allowed to upload a document as the Letter Template.
Declaration	A letter used for Declation.
Resignation Letter Sample	This will enable in <i>Exit Request</i> screen to allow employee to view the resignation letter sample in doing submit exit request.

Exit Reason* ROL01 - Resignati

Resignation Tender Date* 2022-10-04

Last Working Date* 2022-10-04

Last Payroll Date* 2022-10-19

Rehire -- Please select --

Severance Payment* Yes

TEST REFERENCE* ok

Backup Employee* CNDEMO04 (中国测试四)

Attachments -- Resignation Letter Sample.docx

Last SI & HF Pay Month* 1

TEST

Exit Nature* Voluntary

12. **Use Document** – This will be enabled if the selected **Type** is Contract Detail, Employee, Employment Contract, Offer Letter, PSC Notice, e-Sign Document and Contract Detail. If ticked, the **Document** field will be enabled to upload the document and **Document Read Only** can be selected as Yes or No.

Letter Template

Code	Name	Country/Region	Obsolete	Type
CONTRCT_RNWL	Contract Renewal	All	No	Contract Renewal

Code: CONTRCT_RNWL Display Page No: Footer Center Margin Top: 0

Name: Contract Renewal Obsolete: No Margin Bottom: 0

Display Name in ESS: Contract Renewal Type: Contract Renewal Use Document Margin Left: 0

Country/Region: All Require Signing: No Letter Number: Test 001 Margin Right: 0

Document: [Redacted] Document Read Only: -- Please select --

Employee Range: (0=0)

Submission Message

Buttons: Save and Copy, Update, Delete, Close

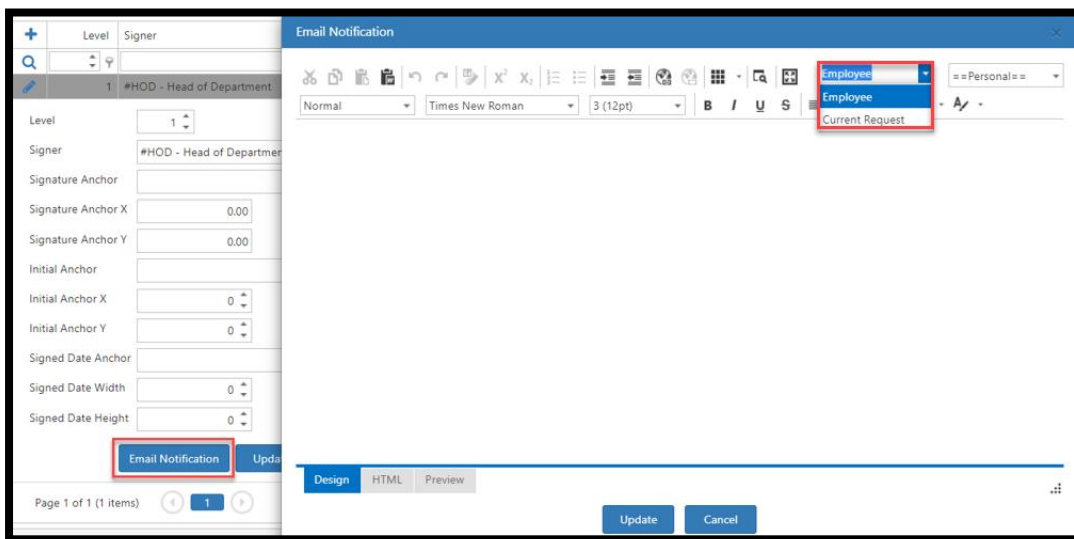
13. **Require Signing**

When Require Signing = **Yes**, system will activate the following parameters:

- **Signing Vendor:**
 - If Country/Region is China - selection will be QiYueSuo, Basic E-Sign and QiYueSuo SaaS
 - If Other Country/Region - selection will be DocuSign and Basic E-Sign
- **Signing CC List** – Select the employees who will receive a copy of the final signed document. Upon clicking Update, it will enable **Signer List**.
- **Signer List** – Click + to enter the required signers.

Signer List	+	Level	Signer
	🔍		
	✎	1	JML001 - Manager One

14. Specify the **Employee Range** on who can use this letter type.
15. Enter **Expression** formula if needed.
16. Enter **Submission Message** (optional).
17. **Signer List & Email Notification** – Upon entering the **Signer List, Email Notification** button will be displayed (if type is **DocuSign**). This is used to set different email template and email notification as per signer level.

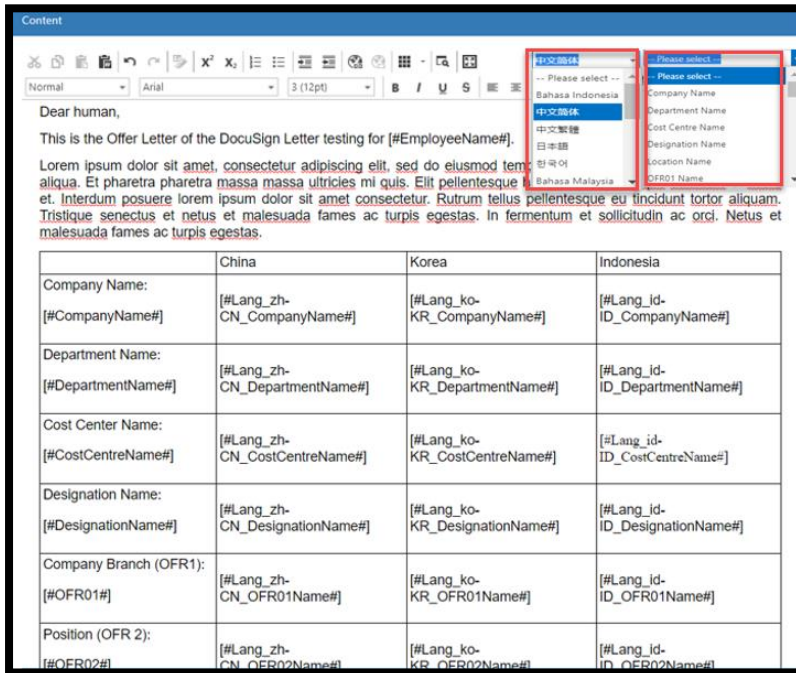


There will be a drop-down selection to select if:

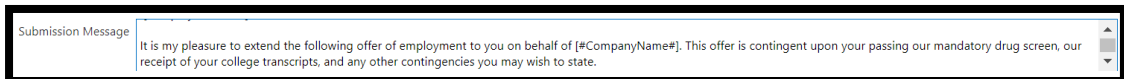
- **Employee** – System will take the information from the employee master data
- **Current Request** – System will take from the employee defined in the transaction.

E.g. In **Onboarding Notice** system will take the data from the candidate/employee that is defined in the transaction screen.

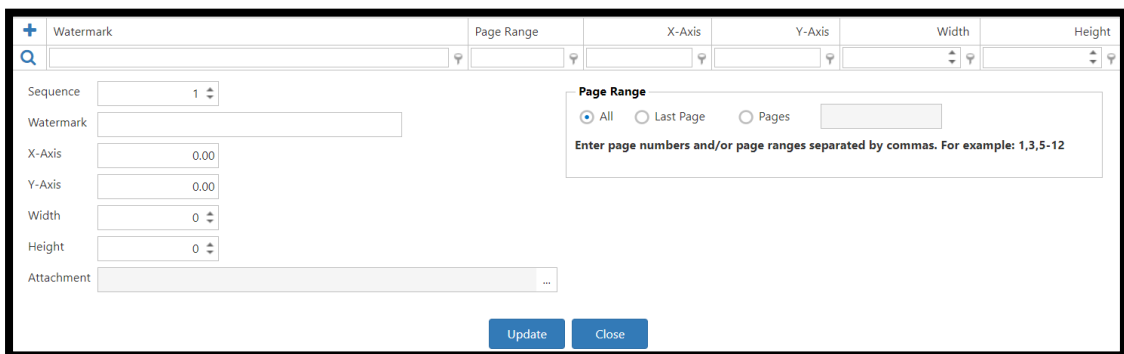
18. **Content** – Specify the **Content, Page Header** and **Page Footer**. There would be a drop-down selection of language list. When user select the language, the drop-down box will show master fields which has language table.



19. **Submission Message** – Enter the submission message to be displayed.



20. **Water Mark** (Optional) – Upload the watermark in the **Attachment Field** and configure the positioning.



21. Click **Update** button to save.

Letter Request

The following example scenario is to illustrate the process of setting up the *Letter Template and Request for Letter Approval*.

Scenario 1: Approval required for letter content and signer

Access: Personnel Module > Reference > Letter > Letter Template

Code	Name	Country/Region	Obsolete	Type
DS1	DocuSign Test 1	All	No	Other
OFFLTR	Offer Letter	All	No	Offer Letter
PHCONT	PH-Contract	All	No	Other

Code	PHCONT	Display Page No	Footer Right
Name	PH-Contract	Obsolete	No
Display Name in ESS	PH-Employment Contract	Type	Other
Country/Region	All	Require Signing	Yes
Hide in ESS	-- Please select --	Signing Vendor	DocuSign
Allow Attachment	-- Please select --	Letter Number	-- Please select --
		Access Code	-- Please select --
		Signing CC List	1000

Level	Signer
1	1001 - John Tan

Page 1 of 1 (1 items) | Page Size 200

Employee Range (0=0)

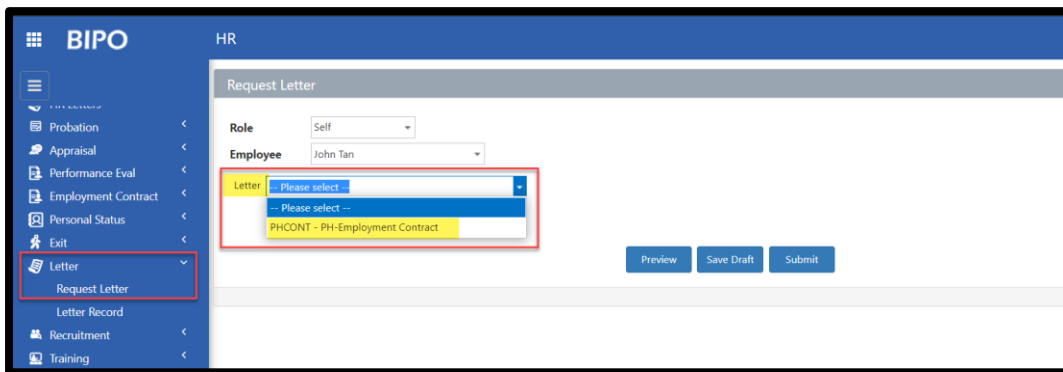
Content

KNOW ALL MEN BY THESE PRESENTS:

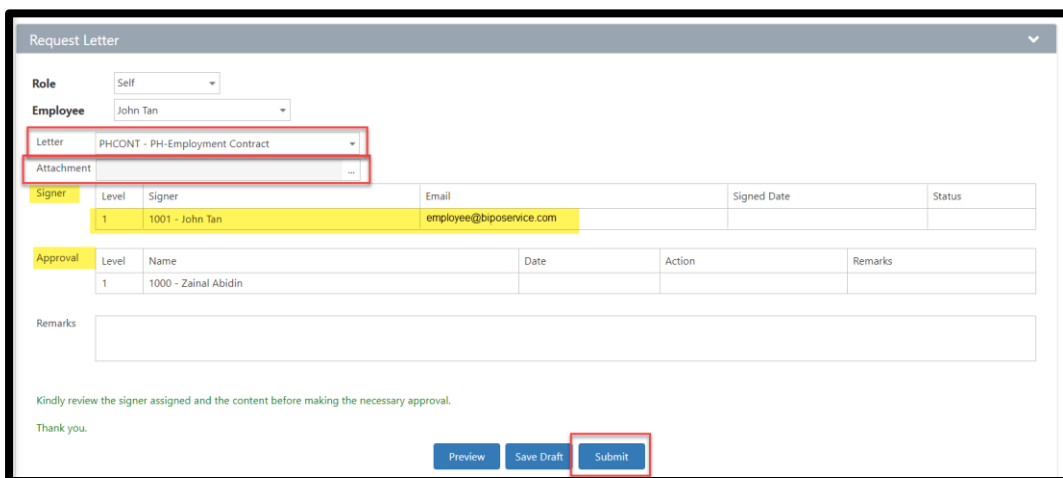
This contract, made and entered into this [#SystemDate#] in _____, Philippines, by and between:

1. Create a letter template using **Type: Other**
2. Select **Require Signing** as **Yes** to activate the **Signer List** section, as shown in the screenshot above. Click on the + icon to setup the signer as well as the level.
3. Select the **Employee Range** in the event there is a need to filter the template application to specific employees based on criteria.
4. Complete the template setup based on the instructions in [Letter Template](#) and [Content](#) section. Once completed, click *Update* to save.
5. To approve the signer listed in the template, login to *ESS* and request letter for approval, as shown:

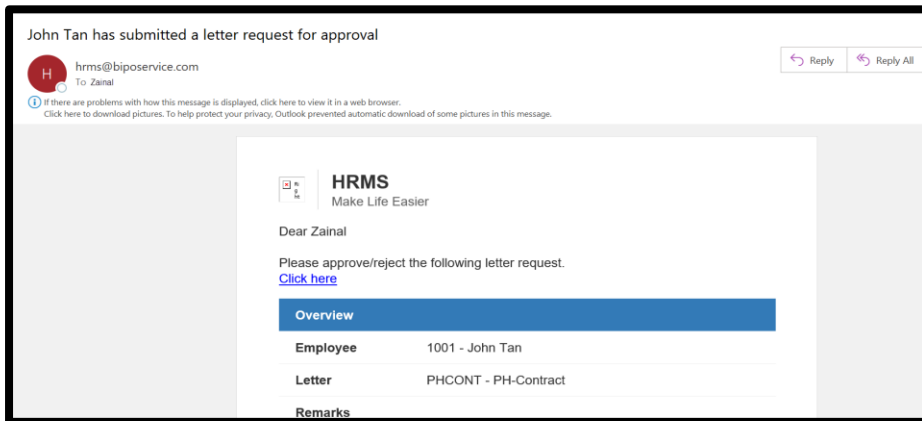
Access: ESS > Letter > Request Letter



6. Select the template that has been created earlier. In the template, the signer is indicated in the *Signer* section and the approver who will approve the signer for this letter is indicated in the *Approval* section.
7. The *Approver* can preview the letter content by clicking on the *Preview* button. User also can upload letter template for approval through attachment (*Allow Attachment* field need to be selected as *Required* or *Optional* to activate the attachment selection field).

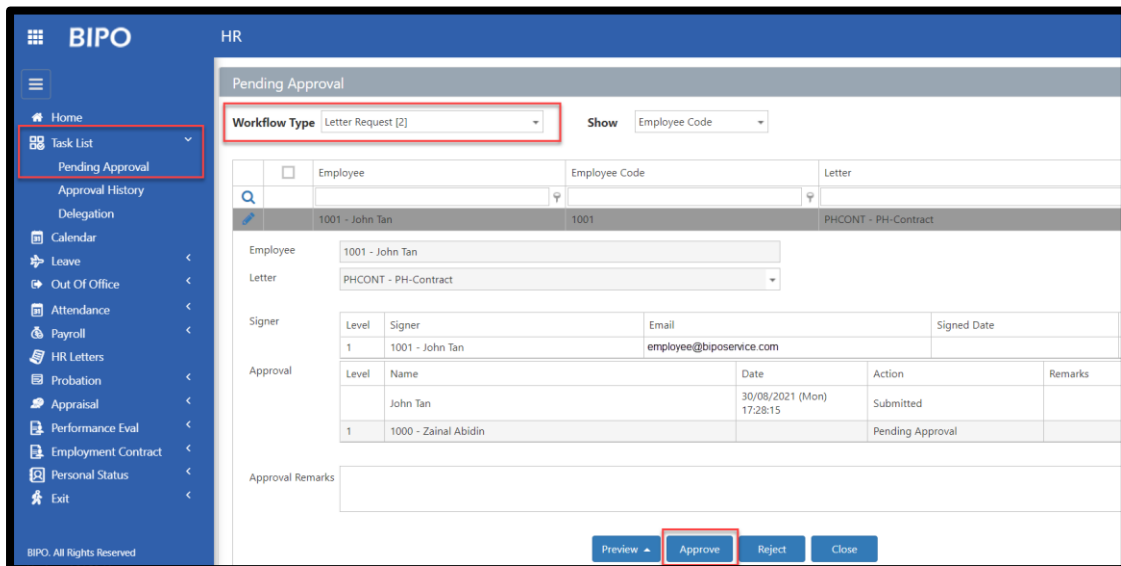



8. To apply for approval, click *Submit*.
9. Once submitted, the *Approver* will receive an email regarding the request for approval, as shown:



10. The Approver can either click on the Click here link in the email or can login to ESS Pending Approval list to approve the signer, as shown:

Access: ESS > Task List > Pending Approval > Workflow Type > Letter Request



11. Click  icon to show request detail and click *Approve*.

Once the request is approved, there will be a changed of status for the letter request in employee's ESS. Status of letter request will be approved (✓) and *Signer status* is indicated as *Sent* to indicate an email is sent to *Signer* to add their digital signature to the letter. *Signed Date* indicate the date of the digital signature is added by the signer.

Note: Steps 11 only applicable when *Require Signing* is *Yes* and all the necessary *Signing Vendors* setting, and configurations has been set.

Access: ESS > Letter > Letter Record.

The screenshot shows the 'Letter Record' interface. At the top, there are dropdown menus for 'Role' (set to 'Self') and 'Employee' (set to 'John Tan'). Below this is a table with columns for 'Employee', 'Letter', 'Date Submit', and 'Status'. A record is shown for employee '1001 - John Tan' with letter 'PHCONT - PH-Employment Contract' and date '30/08/2021'. The status is 'Sent', indicated by a green checkmark in a red box. Below the table, there are fields for 'Employee' (1001) and 'Letter' (PHCONT - PH-Employment Contract). An 'Attachment' section is empty. A 'Signer' table has one entry: Level 1, Signer '1001 - John Tan', Email 'employee@biposervice.com', Signed Date (highlighted in yellow), and Status 'Sent' (in a red box). An 'Approval' table shows two entries: one by John Tan (Submitted) and one by Zainal Abidin (Approved). At the bottom are 'Preview' and 'Close' buttons.

Scenario 2: Approval required for letter content, without signer requirement

Access: Personnel Module > Reference > Letter > Letter Template

1. **Require Signing** is selected as **No** and **Signer List** section will not be activated, as shown:

The screenshot shows the 'Letter Template' configuration interface. At the top, there are dropdown menus for 'Code', 'Name', 'Country/Region', 'Obsolete', and 'Type'. Below this is a table with columns for 'Code', 'Name', 'Country/Region', 'Obsolete', and 'Type'. Three records are shown: 'DS1' (DocuSign Test 1), 'OFLTR' (Offer Letter), and 'PHCONT' (PH-Contract). Below the table, there are configuration fields: 'Code' (PHCONT), 'Name' (PH-Contract), 'Display Page No' (Footer Right), 'Margin Top' (0), 'Obsolete' (No), 'Margin Bottom' (0), 'Display Name in ESS' (PH-Employment Contract), 'Type' (Other), 'Margin Left' (0), 'Country/Region' (All), 'Require Signing' (No, highlighted in a red box), 'Margin Right' (0), 'Hide in ESS' (-- Please select --), 'Letter Number' (-- Please select --), 'Workflow Attachment Format' (-- Please select --), and 'Allow Attachment' (Optional).

2. Login to ESS and request letter for approval:

Access: ESS > Letter > Request Letter

Request Letter

Role: Self

Employee: John Tan

Letter: PHCONT - PH-Employment Contract

Attachment: ...

Approval	Level	Name	Date	Action	Remarks
	1	1000 - Zainal Abidin			

Remarks: Please review and approve the template content.

Kindly review the signer assigned and the content before making the necessary approval.
Thank you.

Buttons: Preview, Save Draft, **Submit**

In the template, there will be no *Signer* section. User will only need to submit letter template for approval.

3. Similarly, in the *Pending Approval* task list, approver will approve/reject on the letter template by clicking on the *Approve* or *Reject* button.

Access: ESS > Task List > Pending Approval > Workflow Type > Letter Request

Pending Approval

Workflow Type: Letter Request [2]

Show: Employee Code

Employee	Employee Code	Letter	Status
1001 - John Tan	1001	PHCONT - PH-Contract	

Employee: 1001 - John Tan

Letter: PHCONT - PH-Contract

Attachment: ...

Approval	Level	Name	Date	Action	Remarks
		John Tan	30/08/2021 (Mon) 20:44:02	Submitted	Please review and approve the
	1	1000 - Zainal Abidin		Pending Approval	

Approval Remarks:

Buttons: Preview, **Approve**, **Reject**, Close

Life Cycle

Life Cycle is a sub module within Personnel Module which function as a platform to enable user to perform functions related to the employees onboarding, offboarding, contract renewal and generation of official onboarding documentation and dissemination of new joiners and resignees' information. This sub-module is integrated with Personnel's Personal Master page, for detailed information of the functions and features of Life Cycle, please refer to the [Life Cycle User Guide](#).

User Notification

User Notification is used to assign a related notice to a specific User that is waiting for action. Specified User can download the Notice on the Welcome Page.

Access: Personnel Module > Setup > Portal > User Notification

The screenshot shows the 'User Notification' form. It has a header with a search icon and a refresh icon. Below the header is a table with columns: Notice, User, Due Period, Due Period Type, Extra Column 1, Extra Column 2, Extra Column 3, Extra Column 4, and Extra Column 5. Each column has a dropdown menu. Below the table are input fields for Notice, User, Due Period (with a spinner), and Due Period Type (with a dropdown). To the right of these fields are five more dropdown menus labeled Extra Column 1 through Extra Column 5.

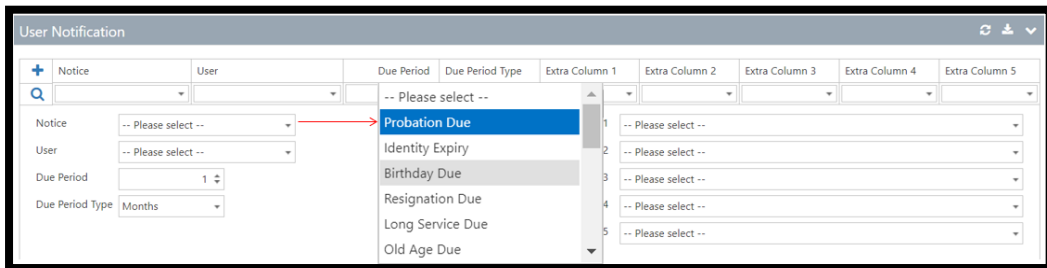
User Notification Setup

Follow the steps below in creating a User Notification:

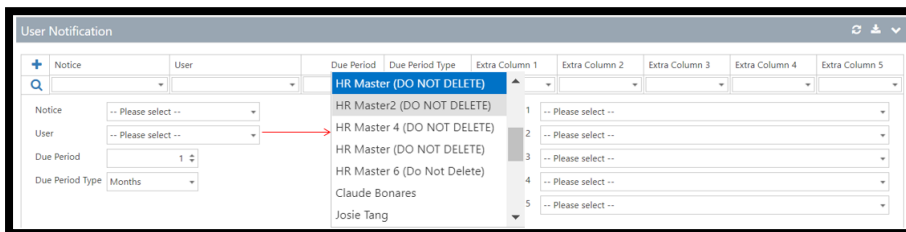
1. Click the add “ + ” button to create a new User Notification. If there is an existing User Notification, it will be displayed as well.

This screenshot is identical to the one above, but a red box highlights the plus sign (+) button in the top left corner of the form, indicating where to click to add a new notification.

- Choose the related Notice for the User to be notified on the Welcome Page.



- Select an existing system User. User Notification will not be visible to other Users from the list.



- Specify the Due Period and Due Period Type. In the sample below, it is set as 2 weeks.



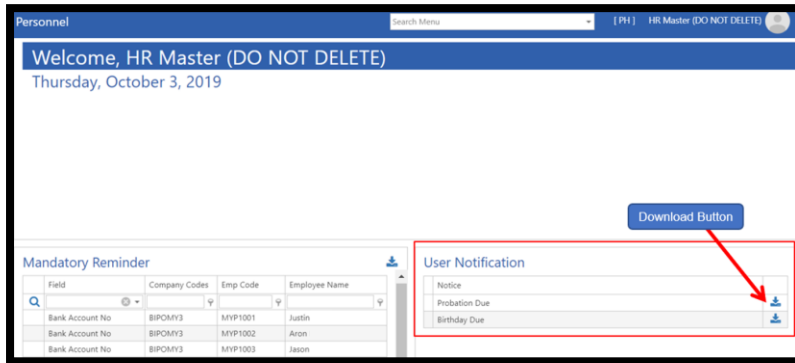
- The extra columns provided will display in the excel output upon downloading on the Welcome Page. This is optional in case User wants to reflect other information in the report.



6. Click Update Button.

User Notification Sample

Home page will display all the User Notification for easy viewing. A download button generates an excel file with complete information of User Notification.



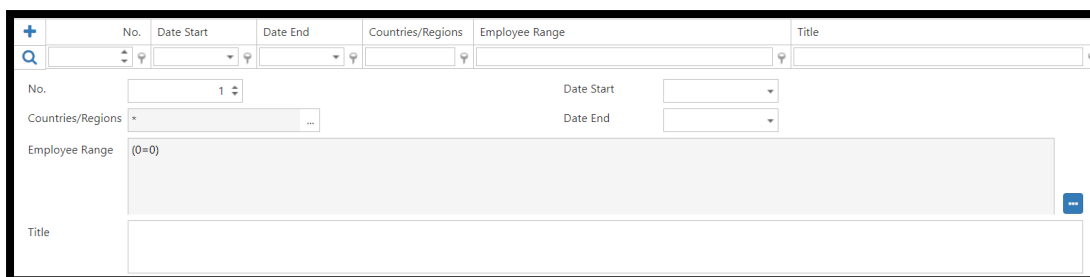
The columns specified in User Notification setting will now reflect in excel output report.



Company Notice

Company Notice serves as a board notification informing employees of an event or other important announcement that will reflect in ESS homepage and BIPO Mobile app.

Access: Personnel Module > Setup > Portal > Company Notice



Company Notice Setup

Follow the steps below in creating a Company Notice:

1. Click the add “ + ” button to create a new Company Notice. If there is an existing Company Notice, it will be displayed as well.

The screenshot shows the top portion of a web form. At the top left, there is a red-bordered square containing a plus sign (+). Below this are several input fields: 'No.' with a dropdown arrow, 'Date Start' with a date picker, 'Date End' with a date picker, 'Countries/Regions' with a dropdown arrow, 'Employee Range' with a dropdown arrow, and 'Title' with a text input field. The form is partially filled with values: 'No.' is 1, 'Date Start' and 'Date End' are empty, 'Countries/Regions' is empty, 'Employee Range' is (0=0), and 'Title' is empty.

2. Select the No. This is the sequence order of Company Notice that will reflect if company is having multiple Company Notices.

A close-up screenshot of the 'No.' field, which is a dropdown menu. The number '1' is selected and displayed in the field. The field is highlighted with a black border.

3. Countries/Regions – Click “...” icon to specify the applicable country to display the Company Notice. All button is provided if it applies to all. Selecting All will display * in the field.

The screenshot shows the 'Countries/Regions' dialog box. The main form in the background has 'No.' set to 1, 'Countries/Regions' set to '*', and 'Employee Range' set to '(0=0)'. A red box highlights the '...' icon next to the 'Countries/Regions' field. The dialog box is titled 'Countries/Regions' and contains a list of countries with checkboxes: All (checked), Australia, Cambodia, China, Hong Kong, Indonesia, India, Japan, Korea-South, Macau, Malaysia, Myanmar, New Zealand, Philippines, Singapore, Thailand, Taiwan, and USA. There are 'OK' and 'Cancel' buttons at the bottom.

4. Employee Range controls the only applicable employee/s that will see the Company Notice. Value should be set to “(0=0)” if it applies to all.

A close-up screenshot of the 'Employee Range' field, which is a dropdown menu. The value '(0=0)' is selected and displayed in the field. The field is highlighted with a black border.

5. Enter the Title that will serve as the header of Company Notice in ESS and BIPO Mobile app.

A screenshot of a form field labeled 'Title' containing the text 'This is a sample Company Notice'.

6. Enter the Date and Date End. Company Notice will display in the date duration.

A screenshot of two date selection fields. The first is labeled 'Date Start' with the value '02/10/2019'. The second is labeled 'Date End' with the value '31/10/2019'.

7. Click Update Button.

A screenshot of two blue buttons: 'Update' and 'Close'.

8. Upon clicking Update button, the following will be enabled for configuration:

A screenshot of a configuration panel. It includes an 'Attachment' field, 'Read Only' and 'Display Pop-Up' checkboxes, a 'Content' text area, and a row of buttons: 'Email Company Notice', 'Download Log', 'Content', 'Update', 'Delete', and 'Close'.

9. Attachment – This is an optional field. User may attach any supporting document or memorandum relating to Company Notice. User may attach my clicking “...”.

A screenshot of an 'Attachment' field containing the text 'company notice.docx' and a file selection icon (three dots).

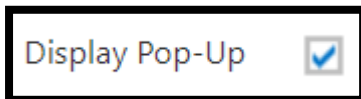
10. Read Only – This affects the viewing and download capability of employees in attached file.

- If check – User can only view and cannot download
- Uncheck – User needs to download to view the attachment

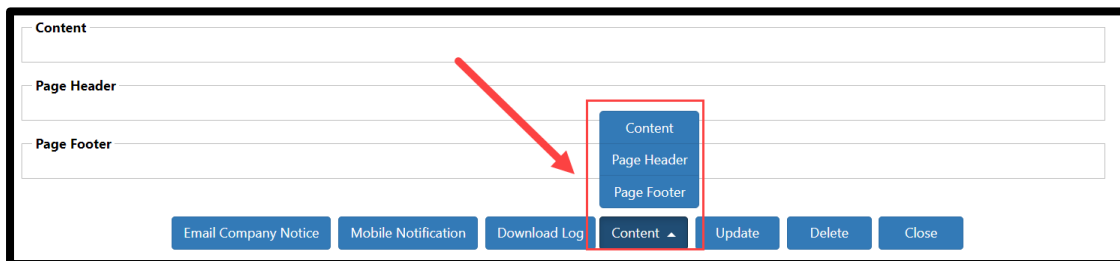
A screenshot of a 'Read Only' checkbox that is checked with a blue checkmark.



11. Display Pop-Up.



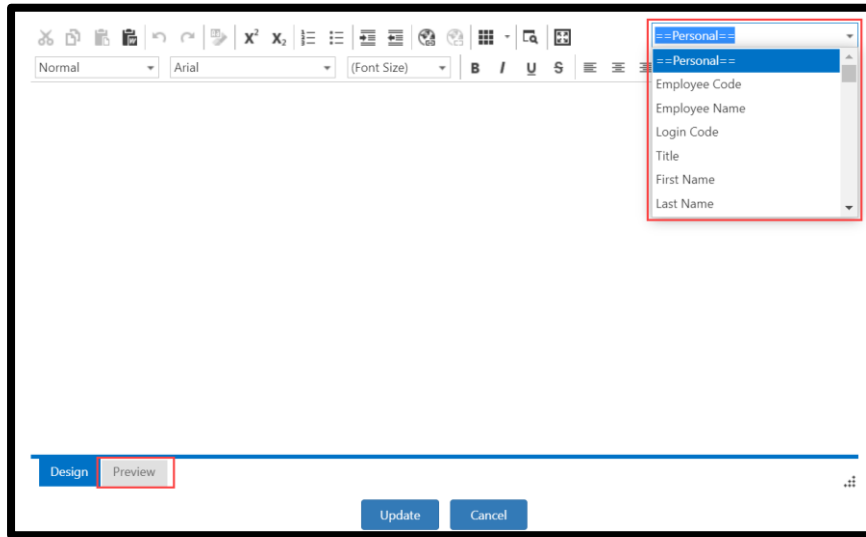
12. Users can enter the content by clicking the Content button. There will be another 3 buttons enabled for selection (Content, Page Header and Page Footer). Click Content button again and a pop-up window will open to type in and format the related content of Company Notice.



There is a field on the top right which allows user to capture the Employee Master and Employee’s Training Information related fields’ value to be shown in the Company Notice. There is a Preview tab below to display the output content.

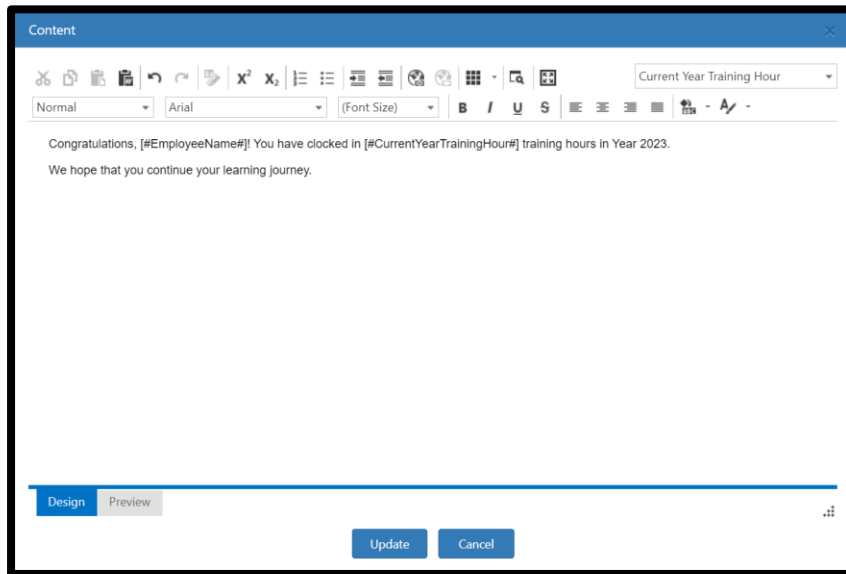
Note: Employee’s Training Information:

- a) Last Year Training Hour – This parameter will return employee’s total training hours from previous year (current year – 1 year).
- b) Current Year Training Hour – This parameter will return the employee’s total training hours from the current year.



Example: There is a requirement to notify employees regarding their total training hours for the year.

User may setup this in system as below screenshot:



13. Email Company Notice – Company Notice can also be emailed and allow User to select the recipient.



Email Company Notice			
<input type="checkbox"/>	Name	Email	Email Subject
<input type="checkbox"/>	Manuel	@biposervice.com	This is a sample Company Notice
<input type="checkbox"/>	Jo	@biposervice.com	This is a sample Company Notice

14. Download Log – This downloads an excel file that shows the recipient’s:

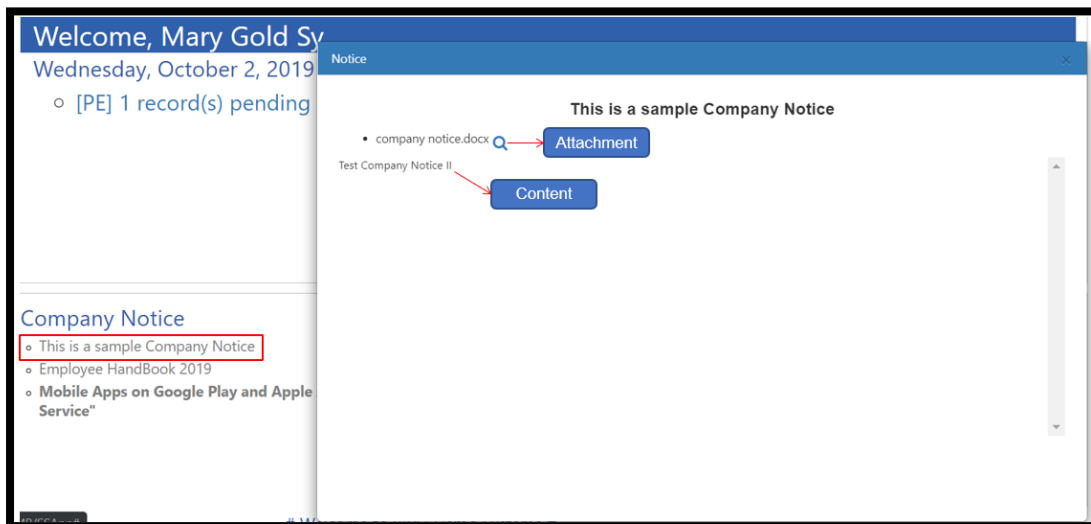
- View Date
- View Time
- Email Date
- Email Time



This is to check if Company Notice was seen by the employees.

EmployeeC	EmployeeN	CompanyC	CompanyName	ViewDate	ViewTime	EmailDate	EmailTime
001	David	BIPOSG	BIPO Singapore Pte Ltd				

Sample Company Notice in ESS



Useful Link

Useful Link is used to create a hyperlink of any website references that will appear in Employee Self-Service (ESS).

Access: Personnel Module > Setup > Portal > Useful Link

No.	Display	URL	Obsolete
1	Company Website	https://www.biposervice.com//	No
2	New	http://sample@gmail.com	No

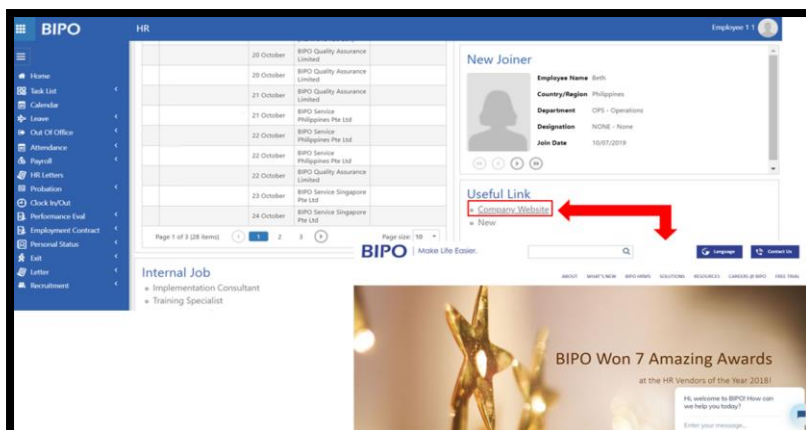
Useful Link Setup

Follow the steps below in creating Useful Link:

1. Click the add “ + ” button to create a new Useful Link. If there is an existing Useful Link, it will be displayed as well.
2. Select the No. This is the sequence order that will reflect if company is having multiple Useful Link.
3. Display – This is the hyperlink text that will be displayed in ESS.
4. URL – Enter the website URL.
5. Obsolete – Default to “No”. Enable to “Yes” if Useful Link is no longer needed.
6. Click Update to save.

ESS Homepage

Useful Link will now be displayed in ESS. Upon clicking, a new browser window will open and User will be directed to the website specified in Useful Link.



Mandatory Reminder

Mandatory Reminder is a pending task that will be displayed on the Employee Master or Welcome Page or even both.

Access: Personnel Module > Setup > Portal > Mandatory Reminder

Mandatory Reminder Setup

Follow the steps below in creating a Mandatory Reminder:

1. Click the add “ + ” button to create a new Mandatory Reminder. If there is an existing or obsolete Mandatory Reminder, it will be displayed as well.

2. Field Name – Choose the related field from the drop-down list that that User will be reminded of for the pending task.

3. Employee Range controls the only applicable employee/s that will see the Mandatory Reminder. Value should be set to “(0=0)” if it applies to all.

Employee Range	(0=0)
----------------	-------

4. Type:

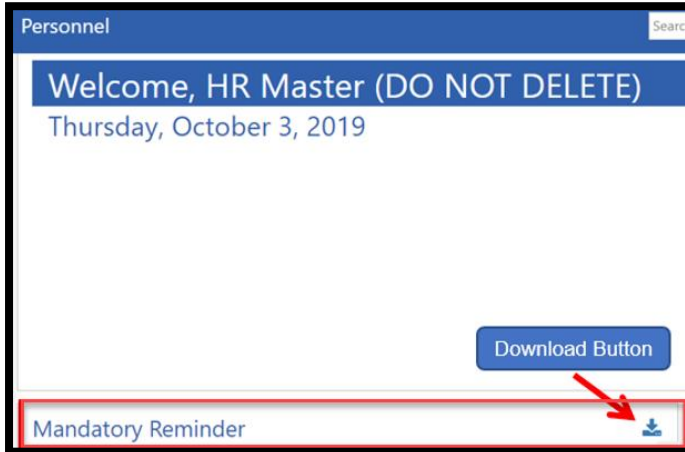
- Mandatory Reminder On Welcome Page – A section on Welcome Page will be created to display the Mandatory Reminder
- Field Reminder on Employee Master – In Employee Master, when value is empty for the field specified in Step 2 and User tries to save, it will prompt a message.
- Both – Mandatory Reminder will appear on both Welcome Page and Employee Master

5. Click Update button to save.

Update	Close
---------------	--------------

Mandatory Reminder on Welcome Page Sample

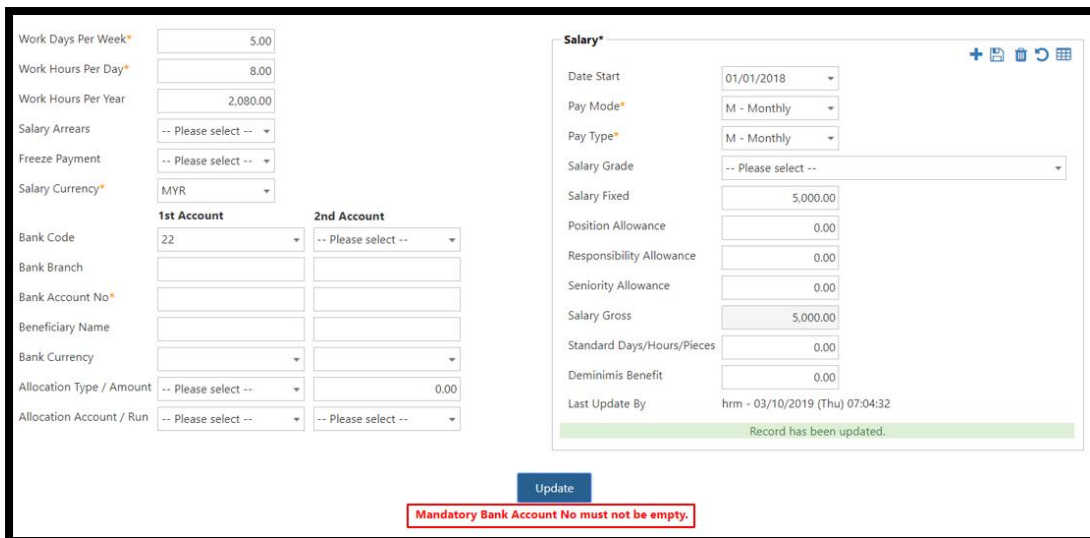
Home page will display all the Mandatory Reminder for easy viewing. A download button generates an excel file with complete information of Mandatory Reminder of all employees.



A	B	C	D	E	F
EmployeeCode	EmployeeName	CompanyCode	Description	Screen	ScreenName
MYP1001	Justin	BIPOMY3	Bank Account No	Salary	Salary
MYP1002	Aron	BIPOMY3	Bank Account No	Salary	Salary

Field Reminder in Employee Master Sample

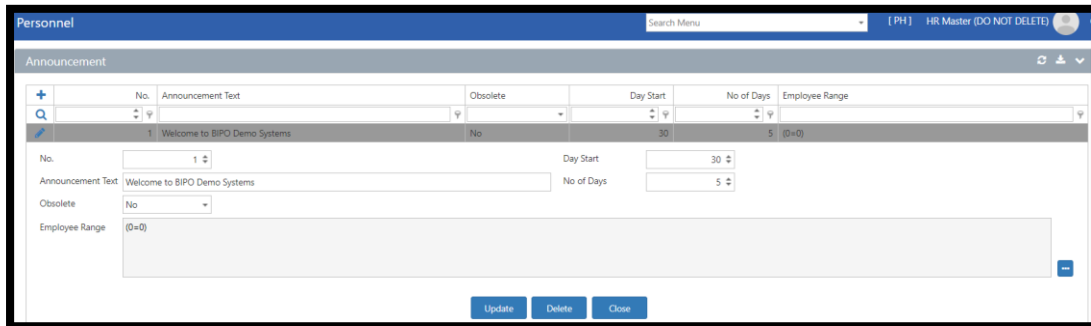
System will display the Mandatory Reminder on Employee Master and User will not be able to save if value is empty.



Announcement

Announcement is used to display a company notification that will reflect at the bottom of BIPO system for both Admin and Employee Self-Service (ESS).

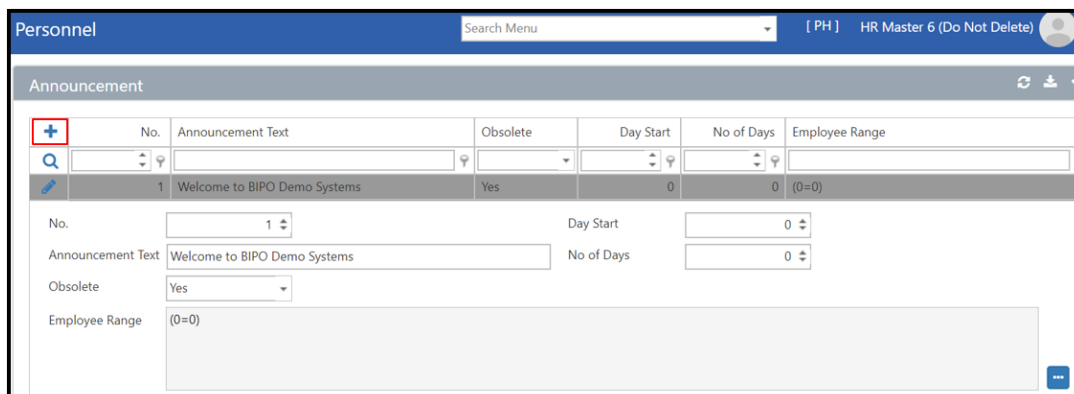
Access: Personnel Module > Setup > Portal > Announcement



Announcement Setup

Follow the steps below in creating an Announcement:

1. Click the add “ + ” button to create a new Announcement. If there is an existing or obsolete Announcement, it will be displayed as well.



2. Select the No. This is the sequence order of Announcement that will reflect if company is having multiple announcements.
3. Enter the Announcement Text that will serve as the notification to display in Admin and ESS.
4. The Obsolete drop down will determine if the Announcement is still active by selecting No. Selecting Yes not delete the Announcement and can be re-activated if user wishes to.
5. Employee Range controls the only applicable employee/s that will see the Announcement. Value should be set to “(0=0)” if it applies to all.

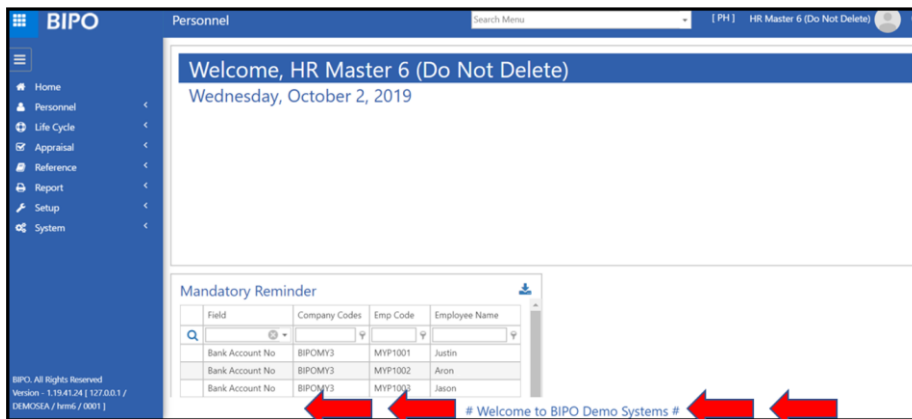
6. Day Start – This is the effective date of the Announcement. Enter the start date of Announcement the current month.
7. No of Days – This is the counting of the days from the Day Start that the Announcement will be active.

Sample: Announcement should be displayed from Oct 2 to 5.

- Day Start – 2
- No of Days – 4 (Oct 2 as first day)

Sample Announcement

The Announcement will be displayed in a horizontal motion from right to left bottom side of the screen.



New Joiner


New Joiner is used to display the basic information of new employee/s such as Employee Name, Country/ Region, Department, Designation and Join date in the homepage of Employee Self-Service (ESS).

Access: System > Config > Personnel > Section: New joiner

System Config (Personnel)			
Section: NewJoiner			
	Section	Name	Value
	NewJoiner	Period	30
	NewJoiner	Duration	3
	NewJoiner	Title	
	NewJoiner	NewJoinerEmployeeRange	
	NewJoiner	AccessGrouping	

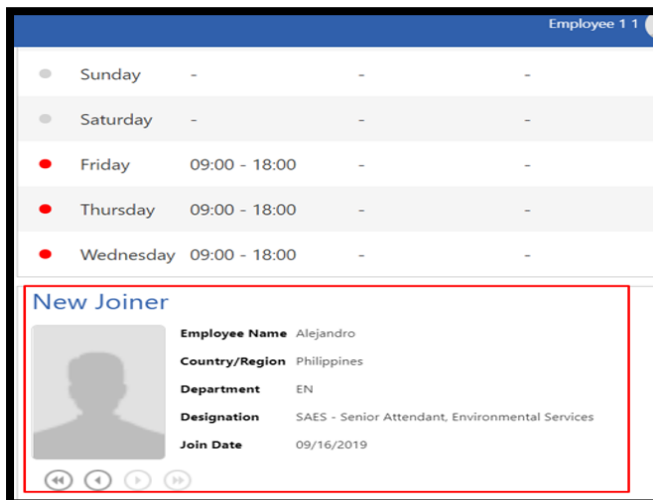
New Joiner Config

Follow the steps below in configuring New Joiner:

1. Click the edit “” icon per line item to set each value.
2. Period – Set the value on how long (in day) the new joiner profile will be shown on New Joiner section. To hide the feature entirely, set Period “0”.
3. Duration – This is the slide show duration in seconds if having multiple new joiners.
4. Title – Enter the value to set the title on New Joiner section.
5. NewJoinerEmployeeRange – This is to control who can see the New Joiner section in ESS homepage. Leaving the value blank will make the New Joiner section visible to all employees.
6. AccessGrouping – This is to add access control to filter access to New Joiner section. Default value is blank. The valid value should be org structure field (Company, Country, Department, CostCentre, Location, OFC01-10, OFN01-OFN05, OFR01-OFR30, OFS01-OFS05)
Ex: HK=Company,Department; CN=Department,CostCentre

ESS Homepage

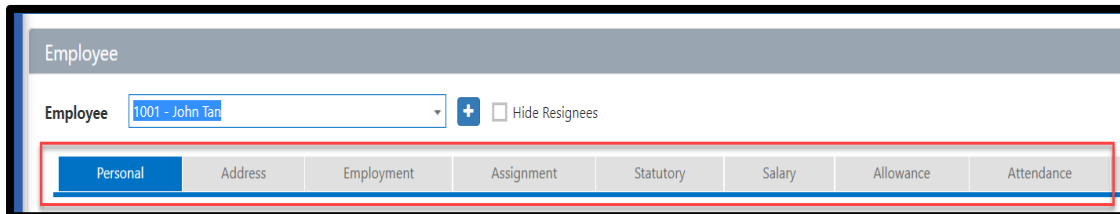
New Joiner section in ESS will reflect the settings made in config menu.



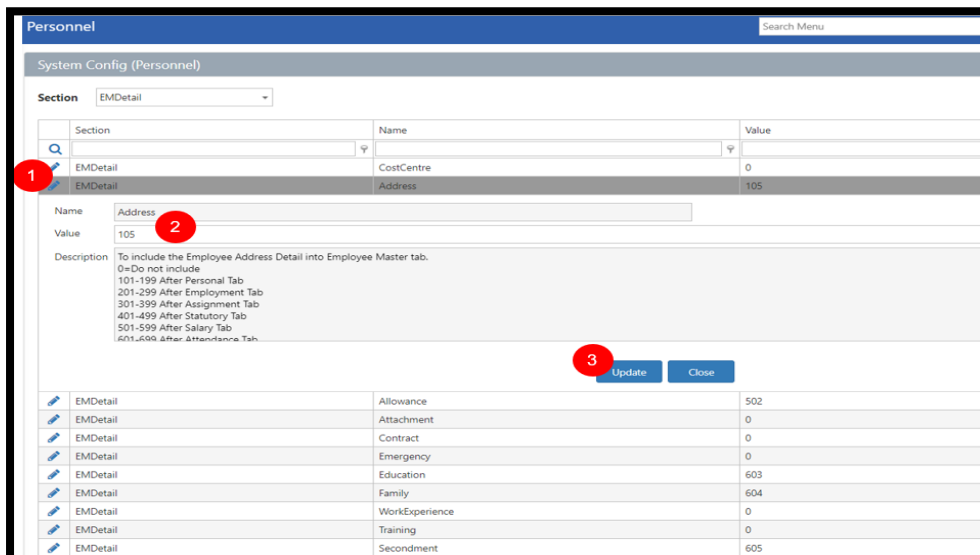
Tab Sequence & Creating of New Tab


Tab Sequence

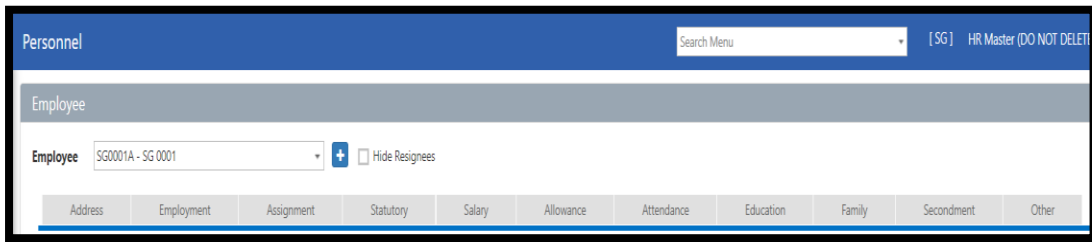
Tab Sequence is used to enable/disable and arrange the sequence order to tabs to display in Employee Master. The selection of tabs to display are usually done during implementation or whenever a client requested to.



Access: *System > Config > Personnel > Section: EMDetail*



1. Click edit  icon to each line field to enable/disable a tab and arrange its sequence order.
2. Set the value based on the following:
 - 0 = Do not include
 - 101-199 After Personal Tab
 - 201-299 After Employment Tab
 - 301-399 After Assignment Tab
 - 401-499 After Statutory Tab
 - 501-599 After Salary Tab
 - 601-699 After Attendance Tab
 - 701-799 After Other Tab
3. Click *Update* to save.
4. The sequence order will now reflect in *Employee Master*.

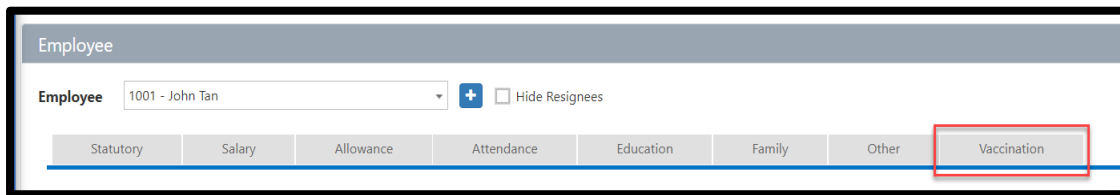


Creating New Tab

The purpose of creating new tab in employee's **Personnel Master page** is to allow user the flexibility to add and customized addition tab/pages that is not in the **Personnel Master** by default.

For example:

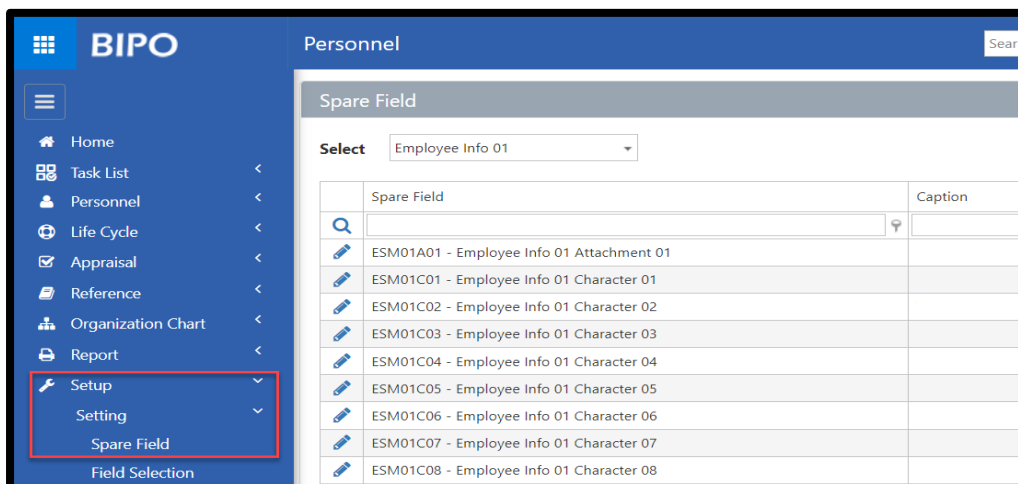
Vaccination tab is not available by default, hence, creating a new tab and its corresponding fields is required.



Creating Fields

The first step is to create the necessary **Fields** in **Spare Fields** menu. These will be the fields that will be available inside the **Tab**.

Access: Setup > Setting > Spare Field

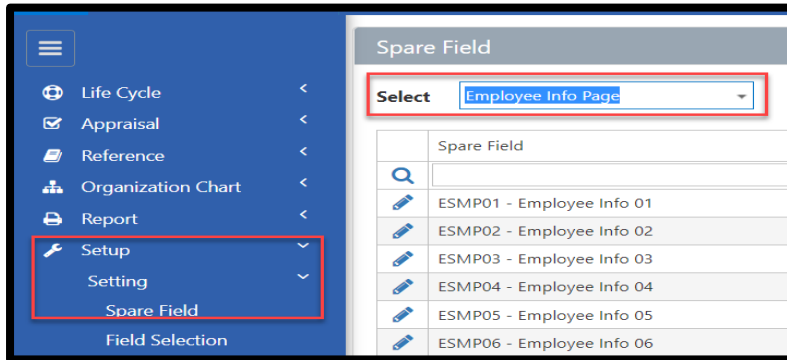


For step-by-step illustration on how to fields in the new tab, **Vaccination** using **Spare**

Field, please refer to [Spare Field Setup](#).

Creating a Tab

Once you had created the fields, proceed to create the **Tab**. Same with creating fields, go to *Spare Field*, to enable a new **Tab**, select **Employee Info Page**.

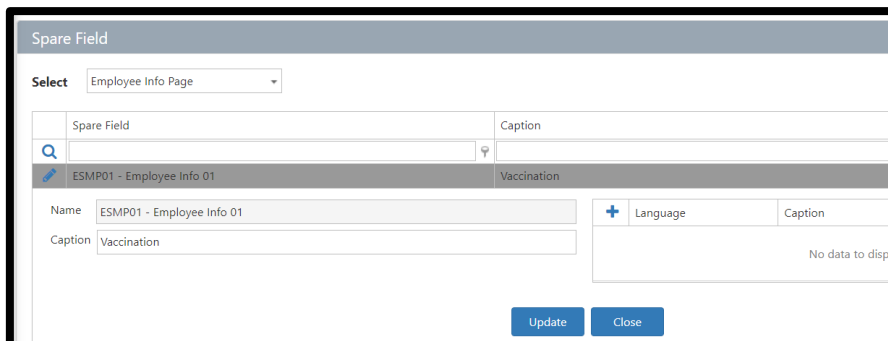


Access: Setup > Setting > Spare Field > Select: Employee Info Page

1. In the *Employee Info Page*, select the corresponding *Spare Field* template that are being utilize for the *Vaccination tab* fields, *ESMP01 - Employee Info 01*.



2. Name the **Tab** using **Caption**



3. Once this is done, next step will proceed to use **Field Selection** to map the fields created for *Vaccination tab* in *Spare Field* the *Tab* page.

Mapping the Fields to the New Tab

Now that both *Fields* and *Tab* are created, the *Fields* should be mapped to the new *Tab* using **Field Selection**.

Access: Setup > Setting > Field Selection > Select: Vaccination [ESMP01] Detail
(which is the created tab)

No.	Field	Countries/Regions	Position
1	Date Start	-	
5	1st Level [ESM01R01]	-	
10	2nd Level [ESM01R02]	-	
15	Remarks (Only for Not Vaccinated) [ESM01C01]	-	
20	Date for 1st Dose [ESM01D01]	-	
25	Date for 2nd Dose [ESM01D02]	-	
30	Type of Vaccine [ESM01C02]	-	

1. Under **Select**, select the **Vaccination [ESMP01] Detail**, this is basically the *Employee Info Page 01 (ESMP01)* that the user had utilized and change the name to *Vaccination* in [Creating a Tab](#)
2. Click **+** button to add the **Fields**.
3. **No.** field relates to the sequence order.
4. Select the field to add from the **Field** drop down selection. **Note:** The drop-down selection will display all the field created in [Creating Fields](#).
5. Select the **Countries/Regions** that this field will be visible to.
6. **Position** can be *Left* or *Right*. It will default to *Left* if not selected or blank.
7. Click **Update** button.
8. Repeat the steps to add the other **Fields**.

Positioning the Tab

To arrange the created **Tab** according to desired sequence, the **Value** should correspond to the given order in the description.

Access: System > Config > Personnel > Section: EMDetail

The screenshot shows the 'System Config (Personnel)' window with the 'Section' dropdown set to 'EMDetail'. A table lists configuration items:

Section	Name	Value
EMDetail	EMDetailSpareEmpInfo01	701

Below the table, the 'Name' field is 'EMDetailSpareEmpInfo01' and the 'Value' field is '701'. The 'Description' field contains a list of ranges and their corresponding tabs:

- 0=Do not include
- 101-199 After Personal Tab
- 201-299 After Employment Tab
- 301-399 After Assignment Tab
- 401-499 After Statutory Tab
- 501-599 After Salary Tab
- 601-699 After Attendance Tab
- 701-799 After Other Tab

At the bottom right, there are 'Update' and 'Close' buttons.

1. If the desired sequence of *Vaccination tab* is after *Other tab*, user can enter any value between 701 to 799.

Example: If the entered **Value** is 701, so the created **Tab** will be displayed *After Other Tab* in *Employee Master*.

The screenshot shows the 'Employee' master interface. The 'Employee' dropdown is set to '001'. Below the dropdown is a 'Hide Resignees' checkbox. A horizontal menu at the bottom contains the following tabs: Address, Employment, Assignment, Statutory, Salary, Allowance, Attendance, Education, Family, Other, and Vaccination. The 'Vaccination' tab is highlighted with a red border.

Other Tab

Other Tab is a default tab that is used as a spare tab. Since it is already created, user will need to create and map the **Fields** to **Other Tab**.

Creating Fields in Other Tab

To create the field for *Other Tab* using *Spare Field*, select **Employee** in the *Select* drop-down selection.

Access: Setup > Setting > Spare Field > Select: Employee

Spare Field		
Select	Employee	
	Spare Field	Caption
	<input type="text"/>	
	EFC01 - Employee Character 01	Medical Insurance Coverage
	EFC02 - Employee Character 02	Vision Insurance Coverage
	EFC03 - Employee Character 03	Dental Insurance Coverage

1. Select **EFC** for **Character Field** and enter the **Caption**:
2. Select **EFN** for **Numeric Field** and enter the **Caption**:

	EFN01 - Employee Numeric 01	Height
	EFN02 - Employee Numeric 02	Weight

3. Select **EFR** for **Reference Field** and enter the **Caption**:

	EFR03 - Employee Reference 03	HMO Coverage
	EFR04 - Employee Reference 04	Blood Group

Positioning the Fields in Other Tab

Once **Fields** are created (as shown above), it should now be arranged according to desired sequence and positioning using *Field Selection*. The **Countries/Regions** should also be set to make it available to selected country.

Access: Setup > Setting > Field Selection > Select: Employee

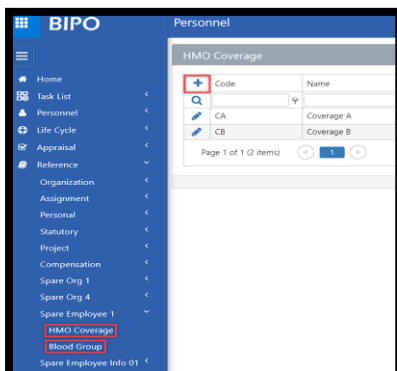
Field Selection				
Select Employee				
No.	Field	Countries/Regions	Position	
3	Height [EFN01]	*	Left	
4	Weight [EFN02]	*	Left	
5	Medical Insurance Coverage [EFC01]	*	Right	
7	Vision Insurance Coverage [EFC02]	*	Right	
8	Dental Insurance Coverage [EFC03]	*	Right	
13	HMO Coverage [EFR03]	*	Right	
20	Blood Group [EFR04]	*	Left	

1. Click **+** button to add the **Fields**.
2. **No.** field relates to the sequence order.
3. Select the **Field** to add from the **Field** drop down selection.
4. Select the **Countries/Regions** that this field will be visible to.
5. **Position** can be Left or Right. It will default to Left if not selected or blank.
6. Click **Update** button.
7. Repeat the steps to add the other **Fields**.

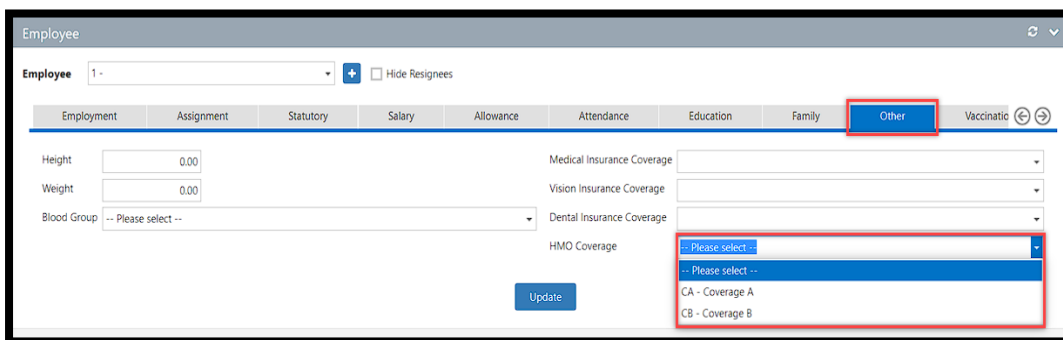
Adding Selections in the Fields for Other Tab

Same with the setup of selection contents in created **Tab**, selection content for **Other Tab** should be added to the **Fields** if the type of field is *Reference*. This is done using **Spare Employee**.

Access: Personnel Module > Reference > Spare Employee 1



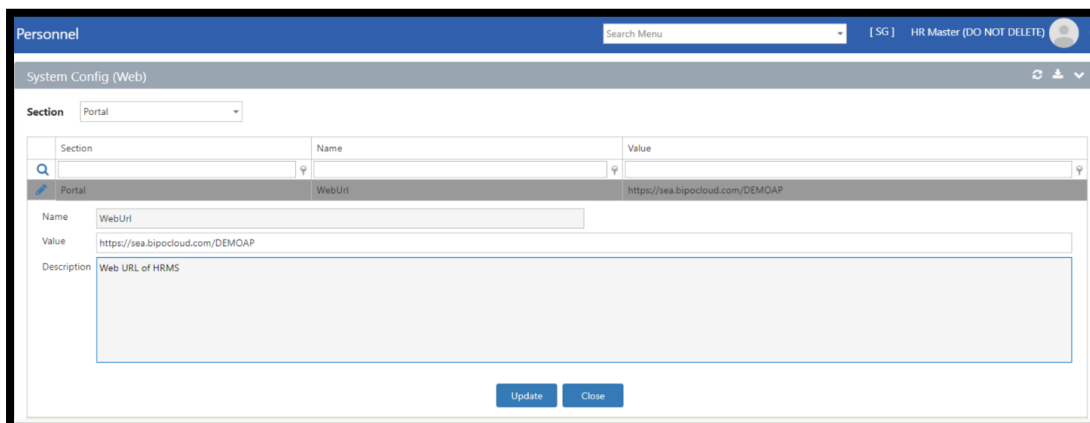
1. Select the **Field** under **Spare Employee**, in the example above, the created **Spare Fields** can be found under **Spare Employee 1**.
2. Click on the **Field**.
3. Click **+** button to create selection content.
4. Enter the **Code** and **Name**.
5. Click **Update** button.
6. Repeat the steps to add the other selections.
7. Selections in the **Field** for **Other Tab** will now be available:



Web URL Email

Web URL is used to set up the URL on how to access the system. The value indicated will be the URL link.

Access: System > Config > Web > Section: Portal



The Web URL will be displayed once the User receive an OTP.

One - Time Password (OTP) Config

Password Policy sets the rules on how the system will treat the password for:

- OTPIInvalidTimes - No of times employee can enter wrong OTP before account to get locked. E.g. 3 times
- OTPExpiryMinutes - No of minutes OTP expires
- OTPAuth - E=Email, S=SMS. It is recommended to choose email as this is most preferred.

Section	Name	Value
PasswordPolicy	OTPIInvalidTimes	10
PasswordPolicy	OTPExpiryMinutes	2
PasswordPolicy	OTPAuth	E

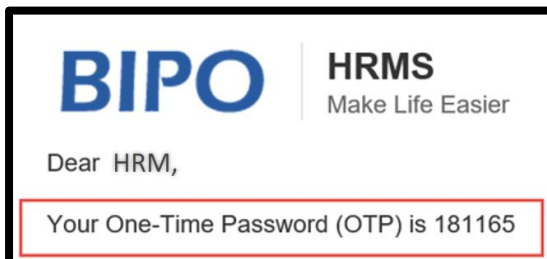
Sending OTP

It is important to input the correct email address to make sure that the OTP will be sent to the correct recipient. User can enter the recipient's email address in:

Access: Setup > Security > User

The screenshot shows the 'User' configuration form. The 'Email' field is highlighted with a red box and contains the value 'employee@biposervice.com'. Other fields include 'Code' (HRM), 'Name' (HR Master (DO NOT DELETE)), 'Type' (Master), and various dropdown menus for 'View Salary', 'Modify Bank Detail', 'Hide Salary', 'Employee', 'Hide Personal Info', and 'Declaration Access'. There are also checkboxes for 'Force change password at next login' and 'Workio Admin'.

User will receive an email with the OTP.



Note: Please refer to [Email Address Field for OTP Access](#) for more information for the setup.

User Access Setup

User

User is an admin access and can be created by the following the *Type* and *Setup*.

Access: *Setup > Security > User*

1. Click **+** to add a new **User**.
2. Enter a **Code**. This will be the username of the user.
3. Enter the **Name** of the user.
4. Specify the **Type** of user to create.
 - User – does not have the ability to create other users
 - Parent User – can create another user but cannot define the type of user
 - Master – can create user as well as define whether the user is a user, parent user or master
5. Select the **Countries / Region** to have access to.
6. Select the **Menu Access** that the user can navigate. **Menu Access** is created in **Setup > Security > Menu Access**. Note that there is a default “#ALL- Access to all menu” already created.
7. Enter the **Mobile No** following the correct country code.
8. Tick the **Force change password at next login** to allow user to change password upon logging in.
9. Tick **Workio Admin** if the created user is **Workio** admin.
10. **View Salary** – Select if user can view the employees’ salary in the system.
11. **Modify Bank Detail** – Select if user can edit the employees’ bank details.

12. **Hide Salary** – Select the filter that the salary will be hidden. Select from the drop down list to select the filter, i.e. to filter by *Company*, *Department*, *Designation* etc.

Clicking will specify the category.

#	Code	Name
<input type="checkbox"/>	008	Jason Kingdom
<input type="checkbox"/>	010	Khema Baby Shop
<input type="checkbox"/>	01test	company test
<input type="checkbox"/>	0316	MNM Co.
<input type="checkbox"/>	1000	Tracking More Pte Ltd.
<input checked="" type="checkbox"/>	1016	Test Company 1016
<input checked="" type="checkbox"/>	101test	test corp china
<input checked="" type="checkbox"/>	110	Test Aw
<input checked="" type="checkbox"/>	111	TEST111
<input checked="" type="checkbox"/>	123	Singapore Demo Company

13. **Employee & Hide Personal Info** is used to hide information about a specific employee.

Select the name of the employee in **Employee** field and select the type of information to be hidden from view by the *User* in **Hide Personal Info** field.

14. Enter the **Email** of the user. Password related such as new password upon user creation or password reset will be sent to specified email address.

Note: The email address is also used for enhanced security feature such as *OTP (One Time Password)* function, please refer to [Email Address Field for OTP Address](#) for more information.

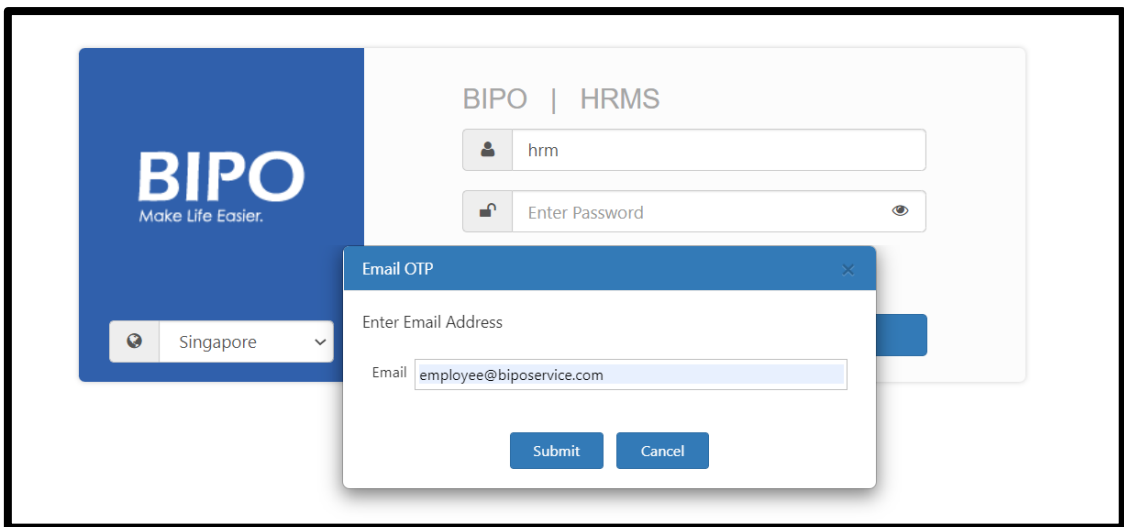
15. **Microsoft Account / Google Account / Enforce SSO** – Refer to *BIPO HRMS Azure AD SSO Implementation User Guide*.

16. **Date Start / Date End** – This will be the active duration of user access. Indicating a *Date End* will delimit the access up to the date specified.

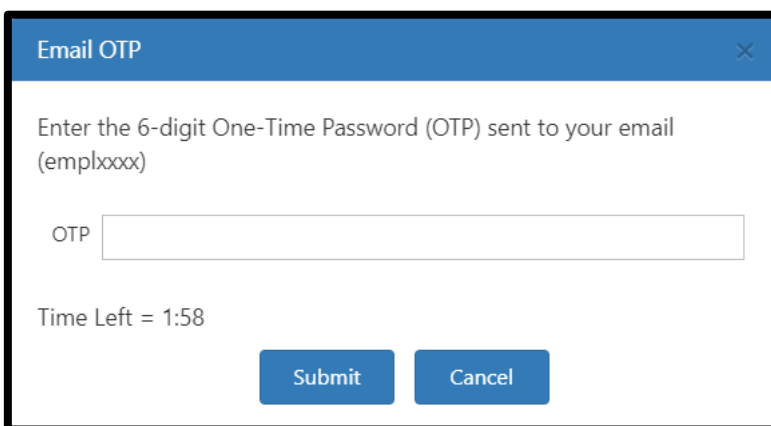
Email Address Field for OTP Access

1. The **Email** field is also used for enhanced security feature when *User* access account is shared by different teams. For example, Project, Support, OS team which needs to have Admin access (i.e. *HRM, HRMSG, HRMMY* for Project teams & *BIPO, BIPOSG01, BIPOMY01* for Payroll Outsource teams).

2. To have better security, OTP (One Time Password) function is introduced to those *User* code starts with *HRM* and *BIPO*.
3. **Email** field will enable *OTP function* when *User* code contains *HRM* or *BIPO* and email contains *biposervice.com* domain (*@biposervice.com*).
4. When login as *HRM*, when click login (without password), a window will prompt to enter the **Email OTP**. User is required to key in the email address listed inside the **Email** in *User Master*. Click **Submit** and a one-time password will be sent to the email address.

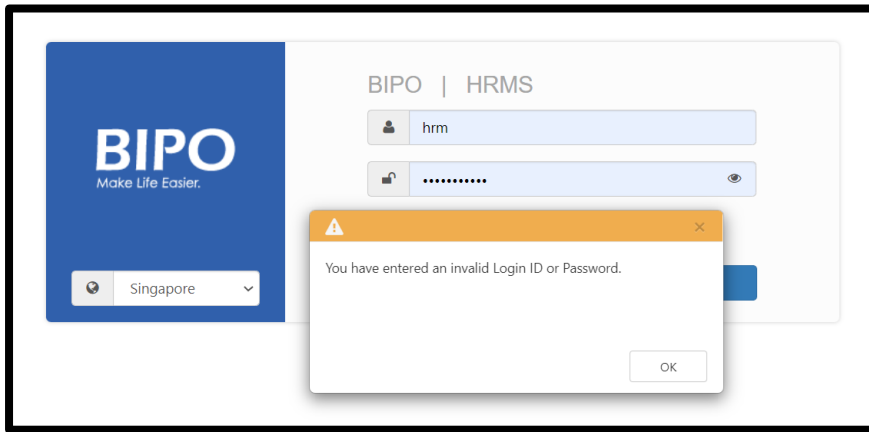


5. At the same time, a new window will pop-up to allow user to enter the 6-digit password.



6. Combination for **Email** which listed in **User Master (Access: Setup > Security > User)**, when **User code is HRM or BIPO** is as follow:

Email	Normal Login	OTP Email
No email - Null	Normal Login (validation of Username & Password) is enabled. If Username & Password wrong, error message will appear.	OTP email function will be skipped.



Email	Normal Login	OTP Email
Other emails/ None bipo-service.com email.	Disabled. Error message will prompt in User Master when click Update whenever email is not bipo-service.com email.	Disabled. Error message will prompt in User Master when click Update whenever email is not bipo-service.com email.

Email	Normal Login	OTP Email
Multiple bipo-service.com email.	Normal Login (validation of Username & Password) is disabled.	System detected bipo-service.com email. OTP email is enabled.

Email	Normal Login	OTP Email
Combination of bipo-service.com email and other emails.	Disabled. Error message will prompt in User Master when click Update whenever there is a combination of other emails with bipo-service.com email.	Disabled. Error message will prompt in User Master when click Update whenever there is a combination of other emails with bipo-service.com email.


User Access

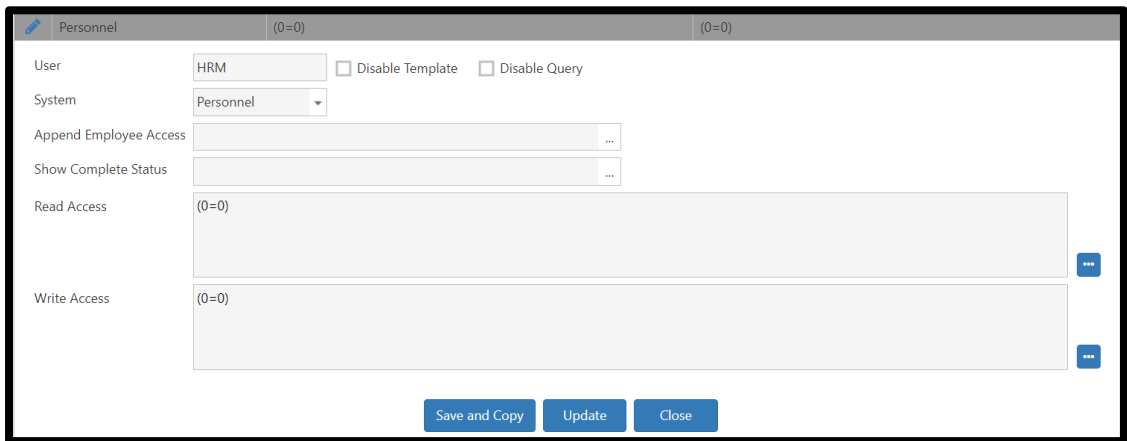
User access is used to define the module access that will be available to selected User.

Access: Setup > Security > User Access

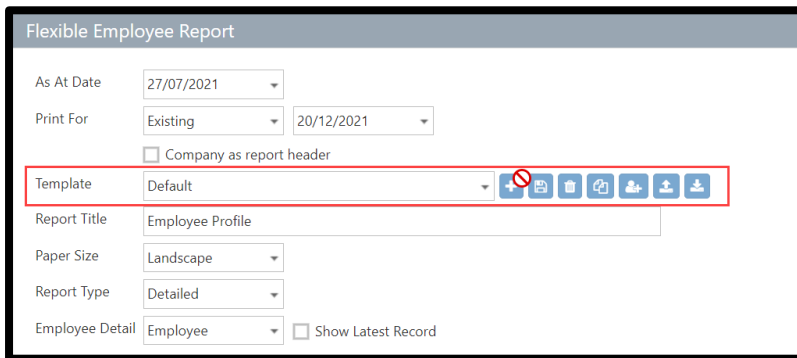
System	Read Access	Write Access
Personnel	(0=0)	(0=0)
Payroll	(0=0)	(0=0)
Leave	(0=0)	(0=0)
Attendance	(0=0)	(0=0)
Claim	(0=0)	(0=0)
Training*		
Appraisal*		
Recruitment*		
Admin*		
Procurement*		
Legal*		
Finance*		
Contract*		

1. Specify the created user from the **User** drop down.

2. Click  icon to modify the access for each module.



3. **Disable Template Checkbox** – When this checkbox is ticked, user will not be able to define the template field in report as below:



4. **Disable Query Checkbox** – When this checkbox is ticked, user will not be able to define the query in the report as below:



This setup will reflect in report list under Personnel Module as below:

No. Report Name

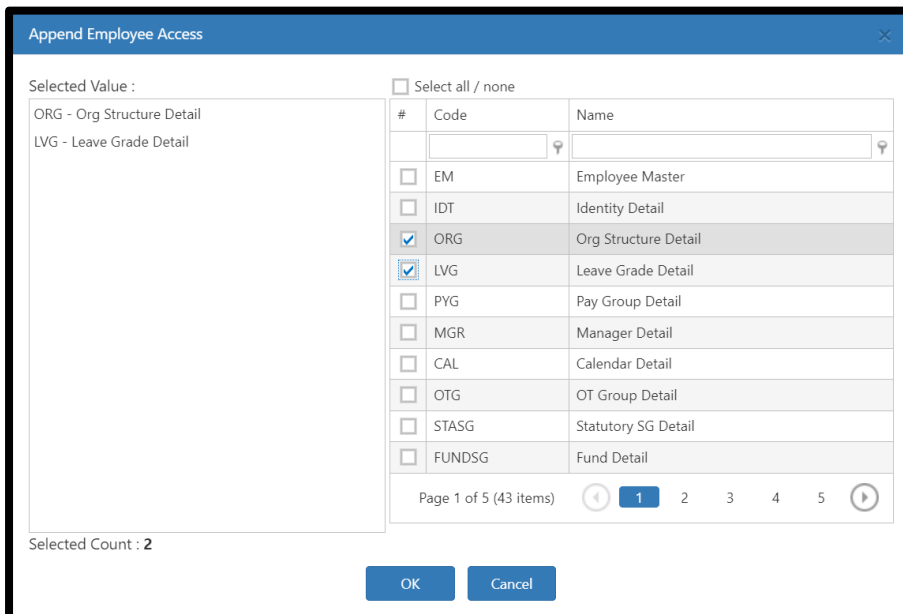
1. Flexible Employee
2. Headcount
3. PE – Flexible PE
4. PE – PE Status Summary
5. Life Cycle – Flexible Onboarding
6. Life Cycle – Flexible Exit Request

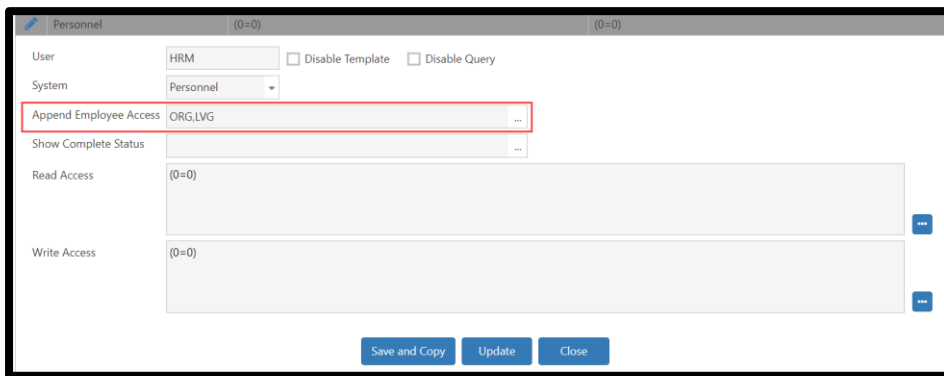
7. Life Cycle – Flexible Exit Interview
 8. Statutory – Key Employment
 9. Labour Market Survey
 10. Business Census
 11. Loan – Loan Listing
 12. Distribution – Manpower Distribution
 13. Distribution – Employee Headcount
 14. Distribution – Transfer Listing
 15. Benefit Matrix Exception
5. **Append Employee Access** – This allows user to control what options are visible in append employee function for **Personnel Module**.



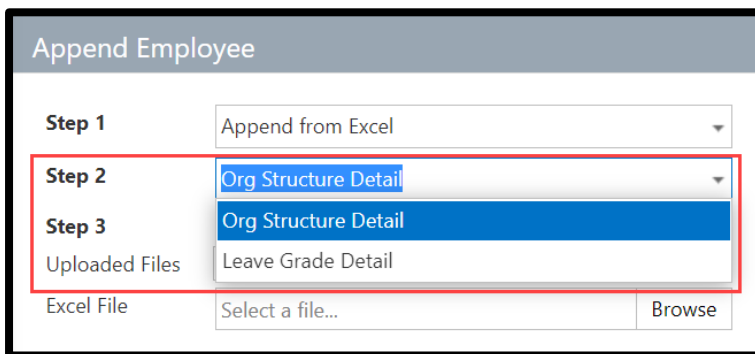
When user click on ... button, Append Employee Option that are applicable to the respective country listed in defined sequence as below screenshot.

Select from the listing and click **OK** button.





In the Append Employee screen, only selected Append Employee Access Option is displayed in Step 2. This is applied to all Step 1 options (Append from Excel, Update from Excel and Export Excel Template).



6. Specify the **Read Access & Write Access:**

- a. **Read Access** – is used to give access to the user for viewing.
- b. **Write Access** – is used to give access to the user for editing.

The value (0=0) represents access for *ALL EMPLOYEES*. To learn more about setting the range for **Read Access & Write Access**, click [here](#).

Note for *Payroll Module*:

- Tick the **Lock Access** to allow user to lock the payroll. Once *ticked*, user will be able to perform lock and unlock all the *Payrun* in the respective *Pay Group* (selected in *Pay Group Access*)

If *Unticked*, the lock and unlocked function will not be available.

- **Pay Group Access** should be specified by clicking button and selecting the pay groups to have access to. This is to allow user to access **Pay Group** in payroll processing.

7. * - Appear at the side of each *Module* indicates that *User Access* is not defined. Therefore, not having access to such modules.

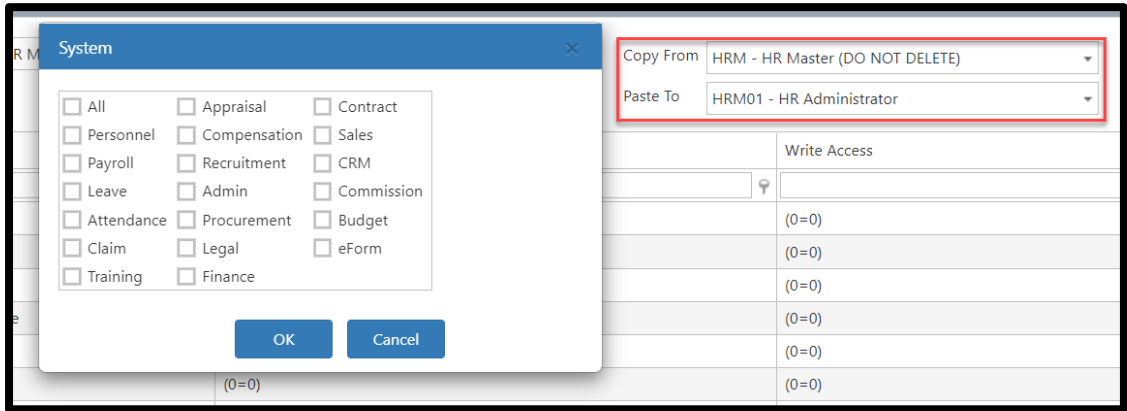
Training*
Appraisal*
Recruitment*
Admin*
Procurement*
Legal*
Finance*
Contract*

Page 1 of 1 (13 items) ◀ 1 ▶

* User access is not defined yet

8. Click **Update** on each module to save.
9. **Copy From** and **Paste To** is used to copy the settings of **Read Access** and **Write Access** of selected module from one user to another by selecting the user to be

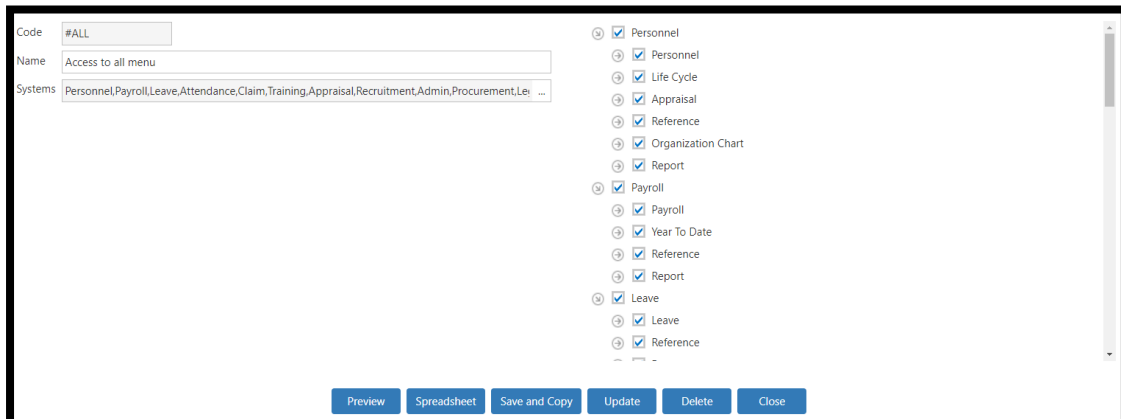
copied in **Copy From** field and selecting another user to whom it will be copied in **Paste To** field.



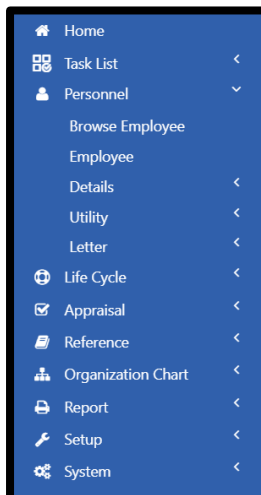
Menu Access

The **Menu Access** holds the configuration of selected menus that user can access according to specifications and privileges.

Access: Setup > Security > Menu Access



Menu Access refers to the **Menu Bar** on the left side, as shown:



Ticked menus will be available for the selected *User* to access. Menu access can be assigned to user through [Menu Access field in User](#).

1. Click **+** to add a new **Menu Access**.
2. Enter the **Code** and **Name**.

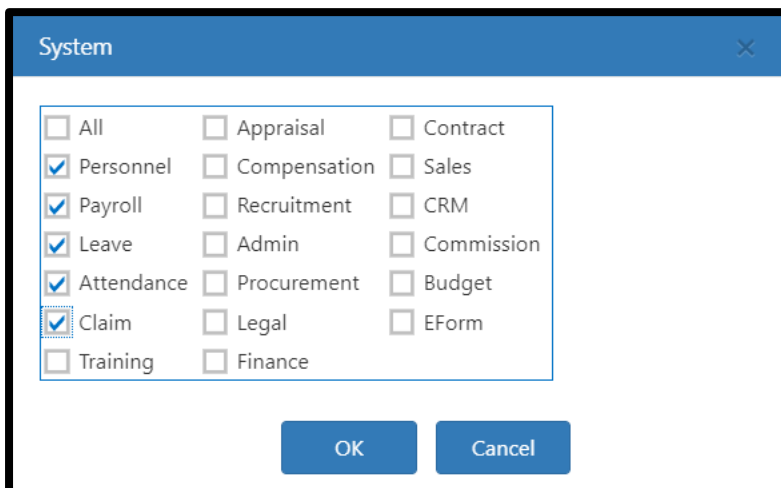


A form with two input fields. The first field is labeled 'Code' and is empty. The second field is labeled 'Name' and is also empty.

3. In **Systems** field, select the modules to appear in the right side. You can check the checkbox for menus and sub-menus to include this access.



A dropdown menu labeled 'Systems' with a small asterisk and a three-dot menu icon on the right.



A dialog box titled 'System' with a close button. It contains a grid of checkboxes for various modules. The following table represents the state of these checkboxes:

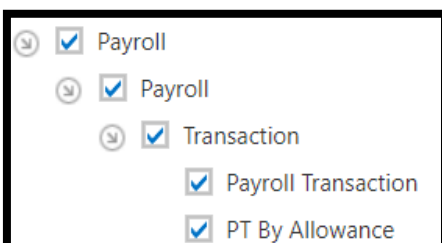
<input type="checkbox"/> All	<input type="checkbox"/> Appraisal	<input type="checkbox"/> Contract
<input checked="" type="checkbox"/> Personnel	<input type="checkbox"/> Compensation	<input type="checkbox"/> Sales
<input checked="" type="checkbox"/> Payroll	<input type="checkbox"/> Recruitment	<input type="checkbox"/> CRM
<input checked="" type="checkbox"/> Leave	<input type="checkbox"/> Admin	<input type="checkbox"/> Commission
<input checked="" type="checkbox"/> Attendance	<input type="checkbox"/> Procurement	<input type="checkbox"/> Budget
<input checked="" type="checkbox"/> Claim	<input type="checkbox"/> Legal	<input type="checkbox"/> EForm
<input type="checkbox"/> Training	<input type="checkbox"/> Finance	

At the bottom of the dialog box are 'OK' and 'Cancel' buttons.

4. Selected modules in **Systems** field (shown above) are default to ticked including its sub-menus.

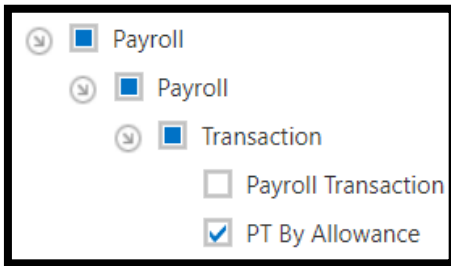
Note:

Check sign in the module indicates that all *Sub-Menus* are also checked.



A tree view showing a hierarchy of menu items. The top-level item 'Payroll' is checked. It has a sub-item 'Payroll' which is also checked. This sub-item has a sub-item 'Transaction' which is checked. 'Transaction' has two sub-items: 'Payroll Transaction' and 'PT By Allowance', both of which are checked. A blue box highlights the 'Payroll' sub-item, indicating it has sub-menus that are not checked.

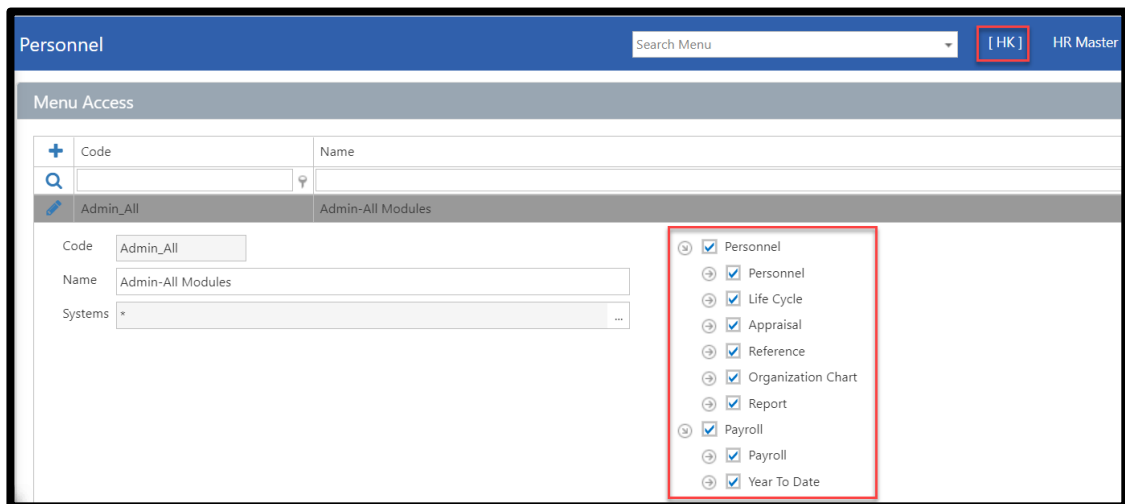
While blue box indicates that there is *Sub-Menus* that is unticked.



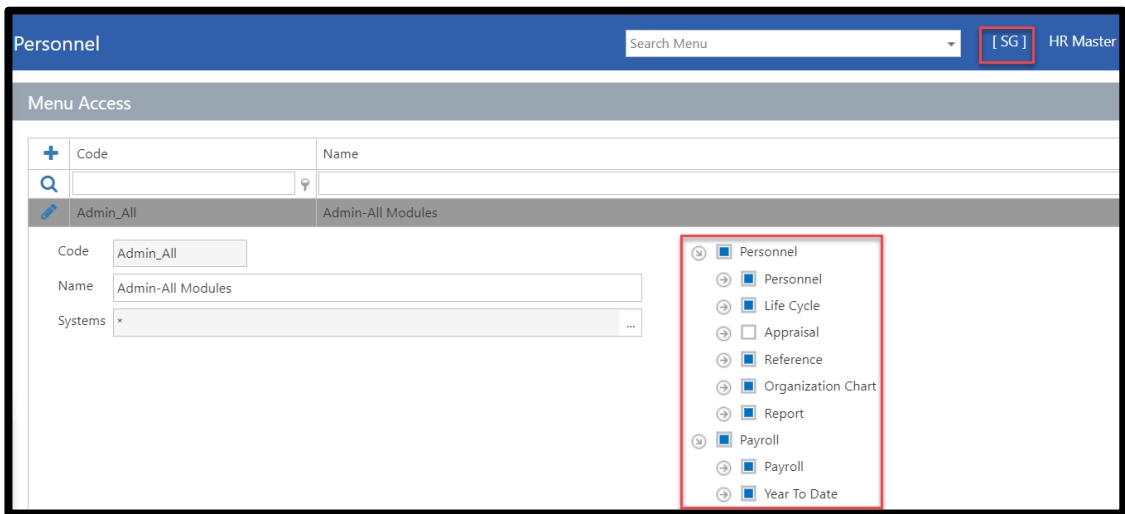
Selecting all *Menus* and *Sub-Menus* in **Menu Access** while logging into one *country/region* does not mean that all *Menus* and *Sun-Menus* is selected in another *country/region*.

Example:

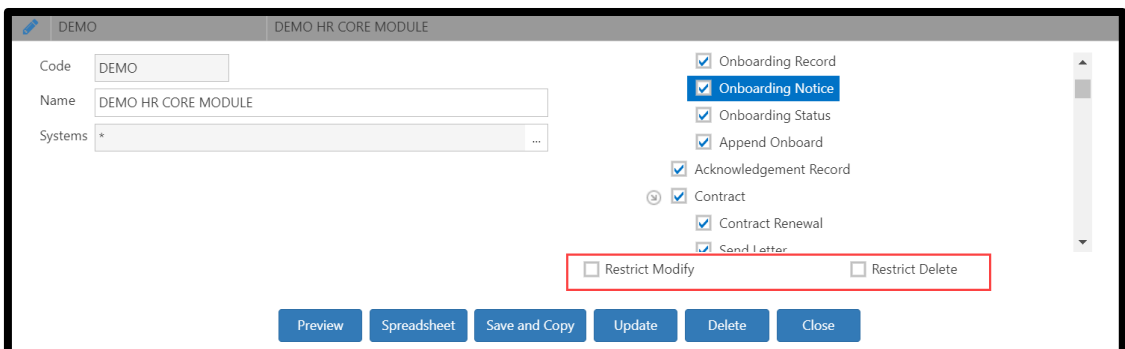
When login to *Country/Region* = *HK* and select access to all *Menus* and *Sub-Menus*, it does not mean that all *Menus* and *Sub-Menus* is automatically selected when login to *Country/Region* = *SG*.



This is because some of the *Sub-Menus* are country specific and requires users to login to the specific *country/region* when selecting the access.

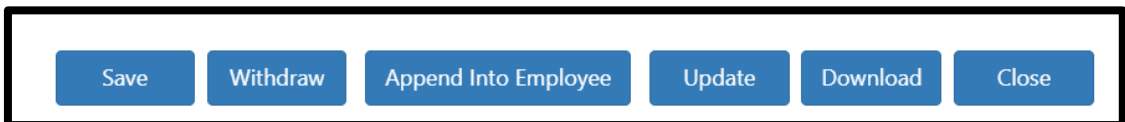


There are additional checkboxes called **Restrict Modify** and **Restrict Delete** for certain sub-menus. This is to control if user can edit or modify record in the specific sub-menu. Default value for these 2 checkboxes are unticked and no button will be hidden.



Example:

When **Restrict Modify checkbox** for **Onboarding Notice** is unticked, button for **Show = New Joiner** as below will appear in user view.



When **Restrict Modify checkbox** for **Onboarding Notice** is ticked, only 2 buttons (**Download** and **Close** buttons) for **Show = New Joiner** as below will appear in user view.



When **Restrict Delete checkbox** for **Onboarding Notice** is unticked, Delete button for **Show = History** as below will appear in user view.



When **Restrict Delete checkbox** for **Onboarding Notice** is ticked, Delete button for **Show = History** as below will be disabled in user view.



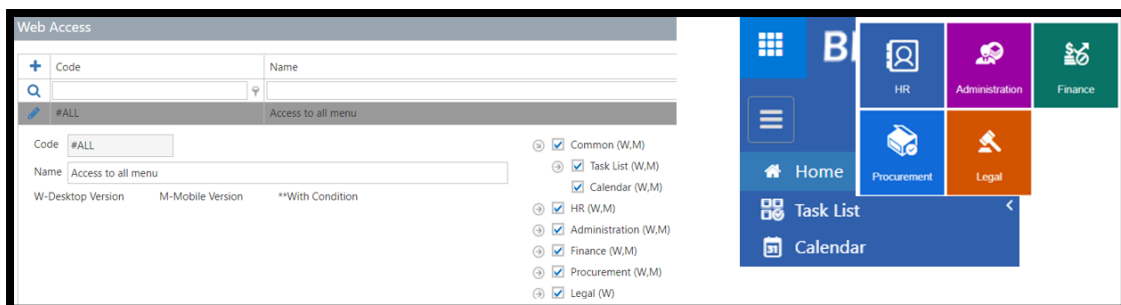
5. Click **Update** button to save.

Web Access

Web Access is used setup the modules that the user can access in *ESS (Employee Self-Service)* for *desktop* and *BIPO mobile app* version.

Access: Setup > Security > Web Access

As shown in the screenshot below, the *ticked Web Access menus* will appear in *ESS' menu column* (i.e. *Task List, Calendar, HR, Administration, Finance etc.*) to allow users to access it.

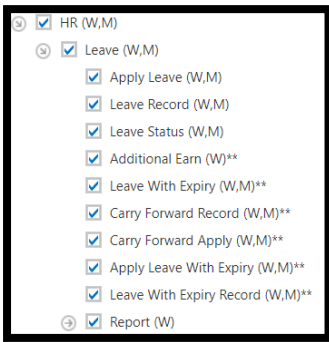


1. Click **+** to add a new **Web Access**.
2. Enter the **Code** and **Name** of the **Web Access**.
3. Select the *menu and sub-menu* that can be access by employees in *ESS*. Each *menus and sub-menus* are tagged with:
 - **W** – desktop version

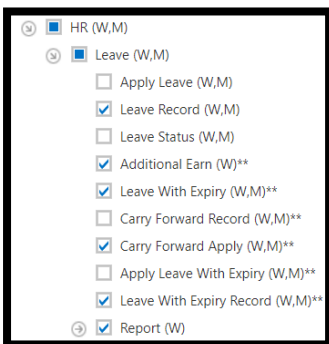
- **M** – mobile version
- ****** - with condition

4. Each menu and sub-menus can be specified if it will only be available to a specific country for web (desktop) and mobile version.

Note: Check sign in the module indicates that all sub-menus are also selected.



While blue box indicates that there is are sub-menus that is unticked.

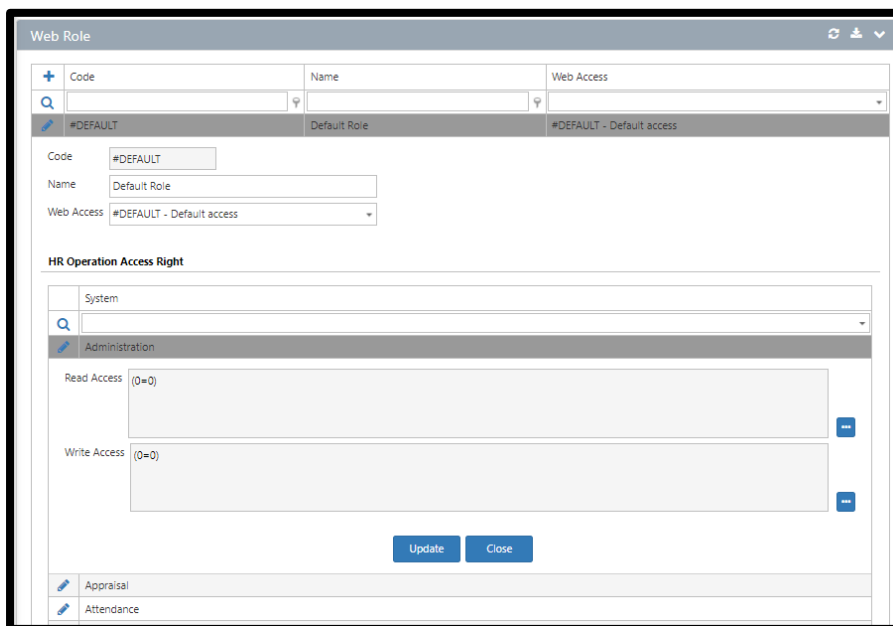


5. Click **Update** button to save.

Web Role

Web Role is used to define the employees that user (HR/Manager/Supervisor/ Approver/Coordinator) will have read and write access to in ESS.

Access: Setup > Security > Web Role



1. Click **+** to create a new **Web Role**.
2. Enter the **Code** and **Name** of the **Web Role**.
3. Specify the **Web Access** from the drop-down list that this **Web Role** will be mapped to. Then click **Update**.






4. Click at the side of each module to setup the **Read Access and Write Access**.
 - a. **Read Access** – is used to give access to the user for editing
 - b. **Write Access** – is used to give access to the user for viewing

+	No.	(.	Not (.	Field	Opr	Range Start	Range End	..)	Conn
	1		<input type="checkbox"/>	Country/Region	=	ID			And
	2		<input type="checkbox"/>	Company	=	BIPOID			Or

In the example above, there are two conditions that will apply. Employee will have access to **Country/Region = ID and Company = BIPOID** only.

5. The value (0=0) represents access for **ALL EMPLOYEES**. To learn more about setting the range for **Read Access & Write Access**, click [here](#).

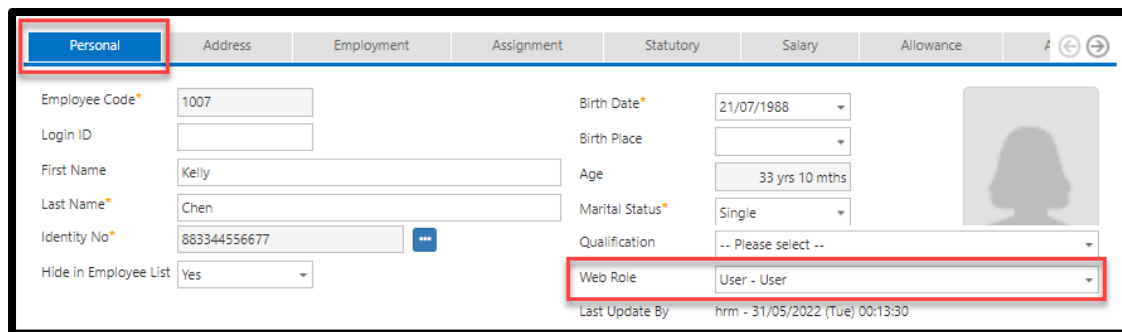
6. * Indicates that **Web Role** access is not defined. Therefore, not having access to employees in such modules.

	Legal*
	Payroll*
	Personnel*
	Procurement*
	Recruitment*
	Sales*
	Training*
*Web role access undefined	

7. Click **Update** on each module to save.

After defining the read and write access to each module in **Web Role**, assign it to the respective employees that has a **Role**, example, HR, Manager, Supervisor, Approver or Coordinator. Assigning **Web Role** can be done in *Personnel > Employee* page.

Access: Personnel > Employee > Personal tab



Personal	Address	Employment	Assignment	Statutory	Salary	Allowance
Employee Code*	1007	Birth Date*	21/07/1988	[Profile Picture]		
Login ID		Birth Place				
First Name	Kelly	Age	33 yrs 10 mths			
Last Name*	Chen	Marital Status*	Single			
Identity No*	883344556677	Qualification	-- Please select --			
Hide in Employee List	Yes	Web Role	User - User			
		Last Update By	hrm - 31/05/2022 (Tue) 00:13:30			

Note: If an employee assigned with a **Web Role** but do not have any **Role** or **subordinate** assigned to them, then the **read and write access** to other employees setting in **Web Role** will not take effect even though the **Employee Range** is set as (0=0). If an employee has **Coordinator/Manager Role**, **Web Role setting** will take effect with **read and write access** to respective subordinates/employees, as shown:

Manager Role:

Access: Personnel > Employee > Assignment tab

The screenshot shows the 'Employee' assignment interface. The 'Employee' dropdown is set to '1006 - Esther Esther'. The 'Assignment' tab is active. The 'Org Structure*' section includes fields for Date Start (31/05/2022), Company, Department (OPS - Operations), Designation (NONE), Location, Cost Centre, Employment Type, and Assignment. The 'Leave Grade' and 'Pay Group' sections show 'No data to display'. The 'Manager*' section, highlighted with a red box, contains: Date Start (31/05/2022), Date End, Manager (1007 - Chen Kelly), and Manager Type (LM - Line Manager).

Coordinator Role:

Access: Personnel > Setup > Workflow > Coordinator

The screenshot shows the 'Coordinator' setup form. The 'Coordinator Type' is 'Leave Application / Out Of Office'. The 'Coordinator' field is set to '1007 - Chen Kelly'. Other fields include 'No.' (1), 'Leave Codes' (ANL), and 'Employee Range' with a filter expression: ((TblEmployee.EmployeeCode='1006')). There are 'Update' and 'Close' buttons at the bottom.

Note: However, who does not have a role but were nevertheless assigned with a *Web Role*, system will still respect the module access in *Web Access* that were mapped to *Web Role*.

The screenshot shows the 'Web Role' configuration form. The 'Code' field is 'User', the 'Name' field is 'User', and the 'Web Access' dropdown is set to 'Training - TRAINING'. There are search and edit icons on the left side of the form.

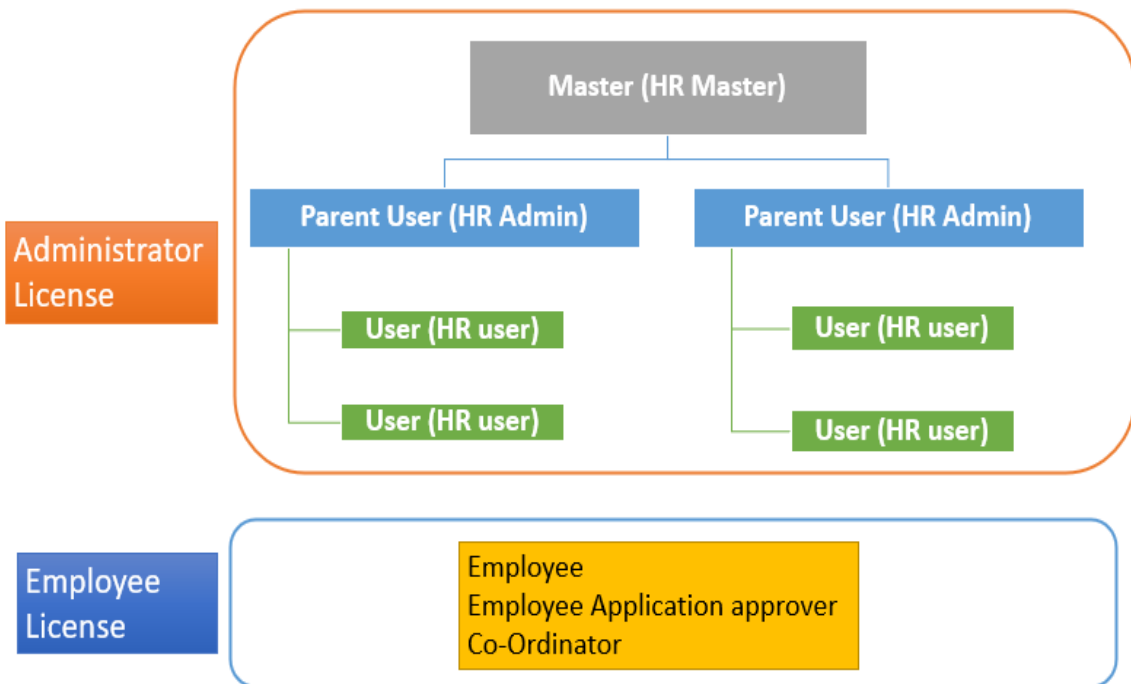
BIPO License

BIPO License determines the number of *Admin User (Master, Parent & User)* and *Employee headcount* a client can have.

License Type

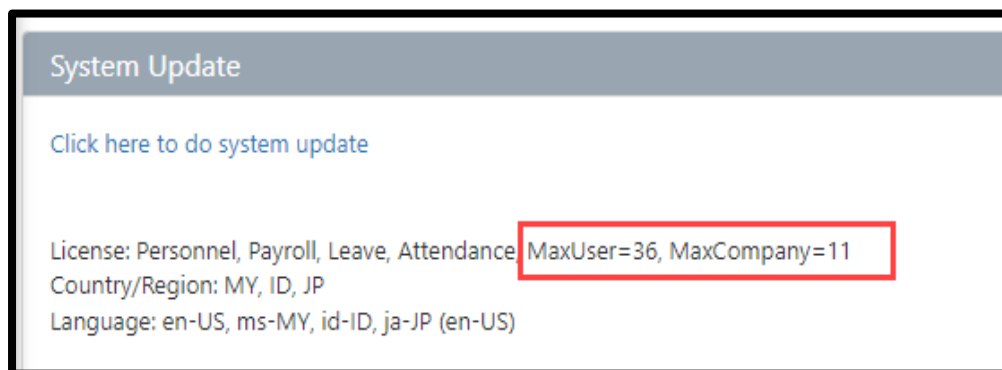
Generally, there are two types of licenses:

1. Administrator License
2. Employee License



License information can be viewed from **System Update** page:

Access: System > System Update



Access Condition of Every License Type

1. **Access Rights** – It defines the range of employees that can be viewed and/or amended by the administrator. Access rights is defined for each administrator per module
2. **Menu Access** - Configuration determines the function and pages that an administrator would be able to access. By controlling the menu setup, it can limit administrator to the roles and function they are able to perform. Menu setup can be configured and assigned to multiple administrators.

Administrator License

Example scenario: HR director needs an access to the whole Database:

License	User Type	Description	Role
Administrator	Master	HR Master	<p>Access: Setup > Security > User:</p> <ul style="list-style-type: none"> • Able to create new user and view all user created in database - for all the User Types: HR Master (Master), HR Admin (Parent) and HR User (User). • Able to edit own Master User setting. <p>Setup > Security > User Access:</p> <ul style="list-style-type: none"> • Have read/write access to view and edit all users and can assign read/write access to all other users. <p>Setup > Security > Menu Access:</p> <ul style="list-style-type: none"> • Have access to view/edit menus access of all other users and can assign menu access. • Access rights to all payroll reports based on menu access setting. • Able to create new template for payroll reports.

Example scenario: Country Head needs an access to his/her respective country:

License	User Type	Description	Role
Administrator	Parent User	HR Admin	<p>Access: Setup > Security > User:</p> <ul style="list-style-type: none"> • Able to create new child user ID for User Type: HR User (User) only. • Able to edit setting of the child user created. • Unable to view/change own <i>Parent User</i> setting. <p>Setup > Security > User Access:</p> <ul style="list-style-type: none"> • Child user read/write access will be limited by the parent user access. <i>Example:</i> Parent user only able to view SG employees, child user would be the same even if the employee range is set as (0=0) • Unable to edit own <i>Parent User</i> read/write access. <p>Setup > Security > Menu Access:</p> <ul style="list-style-type: none"> • Have access to view/edit menus access of child users and can assign menu access to child users. • Access rights to all payroll reports based on menu access setting. • Able to create new template for payroll reports.

Example scenario: HR who manages the payroll:

License	User Type	Description	Role
Administrator	User	HR User	<p>Access: Setup > Security > User:</p> <ul style="list-style-type: none"> • No permission to access, unable to create any user ID.

			<p>Setup > Security > User Access:</p> <ul style="list-style-type: none"> • No permission to access to edit read/write access. • Have access and maintain employees' information only based on the read/write access assigned by HR Admin (<i>Parent User</i>). <p>Setup > Security > Menu Access:</p> <ul style="list-style-type: none"> • No permission to access to edit menu access. • Have access and maintain employees' information in modules assigned by HR Admin (<i>Parent User</i>) only. <i>Example: Personnel Module</i> only. • Conditional access to payroll reports, based on <i>Reference > Payrun > Show in Payroll Report (ESS and Role User)</i> is set to <i>Yes</i> to view the report. • Only able to generate payroll report based on distributed template.
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Employee License

Example scenario: Approving Manager's access:

License	User Type	Description	Role
Employee	Approver	Approval	<p>Access: Setup > Security > Web Access</p> <ul style="list-style-type: none"> • Able to access employee's own information through <i>Employee Self Service (ESS)</i> based on the menu access setup in <i>Web Access</i>. <p>Access: Setup > Security > Web Role</p> <ul style="list-style-type: none"> • Access to own team's employees/subordinates' information

			<p>based on the read and write access setting in <i>Web Role</i>.</p> <ul style="list-style-type: none"> • Able apply on behalf/approve/reject employee's/subordinate's application.
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Example scenario: Coordinator's access:

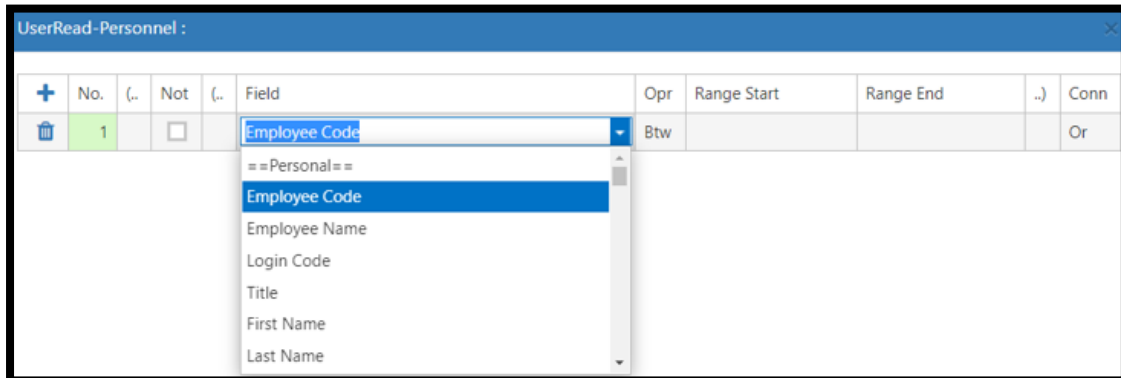
License	User Type	Description	Role
Employee	Coordinator	Coordinator	<p>Access: Setup > Security > Web Access</p> <ul style="list-style-type: none"> • Able to access employee's own information through <i>Employee Self Service (ESS)</i> based on the menu access setup in <i>Web Access</i>. <p>Access: Setup > Security > Web Role</p> <ul style="list-style-type: none"> • Access to employee's information based on the <i>Coordinator</i> setting in <i>Setup > Workflow > Coordinator</i>. • Able apply on behalf employee's application.

Example scenario: Employees' access to ESS:

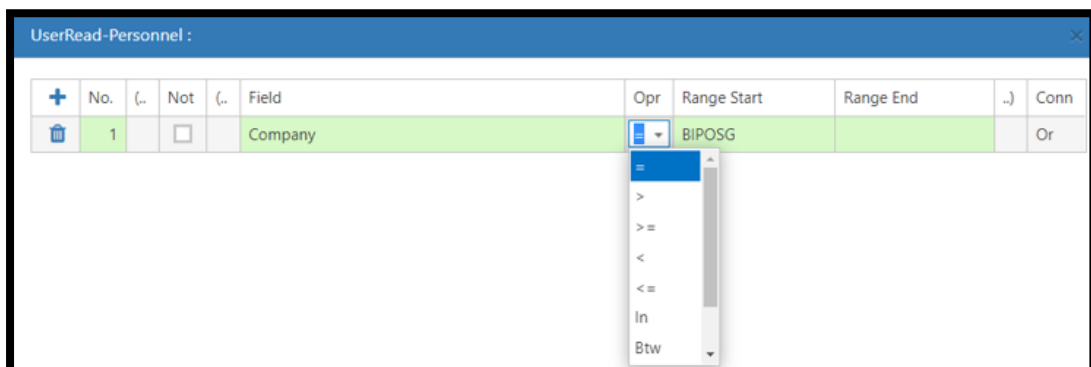
License	User Type	Description	Role
Employee	Employee	Employee	<p>Access: Setup > Security > Web Access</p> <ul style="list-style-type: none"> • Able to access employee's own information through <i>Employee Self Service (ESS)</i> based on the menu access setup in <i>Web Access</i>. <p>Access: Setup > Security > Web Role</p> <ul style="list-style-type: none"> • Employees who do not have <i>Role/subordinates</i> will be unable to access the information of other employees.

Setting the Range for Read Access and Write Access

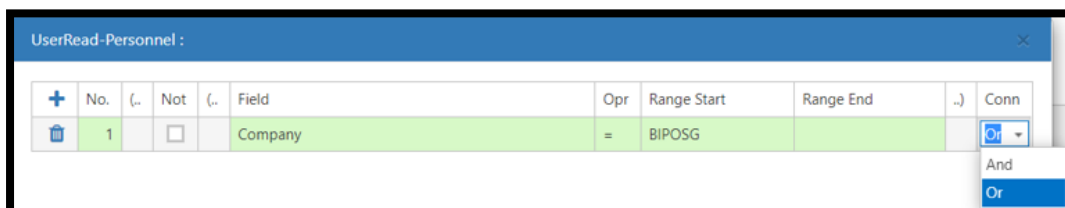
1. Click  in **Read Access or Write Access**.
2. Click  to enter the range.



3. Select in the drop-down list of filed to set how to filter employee.
4. Set **Opr** as this will be the formula from the given Range Start and Range End.
 - = means can select only one value in Range Start
 - **In** means can select several values in Range Start
 - **Between** means need to set value in Range Start and Range End
 - >= means the field must large or equal the value set in Range Start



5. The **Conn** column is used if having multiple Range. Values given are **And** and **Or**, then click **Update**.



6. If want to set all employee, then need to set as below steps:
 - Directly click **Update** button below to save

- When display **(0=0)** that means all employees

Appendix

All Enhancement 2022 included in this User Guide can be found in the following Release Note Version:

#	RELEASE NOTE	JIRA	SUMMARY
1	Release Note 2203	HRMS-6995	Added Employee and Training Information Parameter in Company Notice Content Setting
2	Release Note 2205	HRMS-7046 HRMS-7054	Added Salary Fields into the Transfer Listing Report Added Company as Report Header Checkbox into Manpower Distribution and Transfer Listing Report
3	Release Note 2211	HRMS-7433	Added Download Function on Letter Record
4	Release Note 2213	HRMS-6700	New Organization Structure Relationship
5	Release Note 2215	HRMS-7683 HRMS-7554	Enabled Multi Languages Setup for Personnel Reference Added New Work Location Menu
6	Release Note 2217	HRMS-7685 HRMS-7732 HRMS-7878	Enabled Multi Languages Setup for Personnel Reference Added Get Previous Data Checkbox in Append Employee under Salary Detail Added Allow Preview in ESS Parameter in Letter Template
7	Release Note 2219	HRMS-7902	New Append Org Structure Menu
8	Release Note 2221	HRMS-8087 HRMS-8082	Added DelegationEmployeeRangeFormat System Config Enhancement to Employee Letter Template Type
9	Release Note 2223	HRMS-8083	Document Upload as Letter Template for "Offer Letter" Type
10	Release Note 2225	HRMS-8274	Added Send Email Feature in PSC Record
11	Release Note 2227	HRMS-8421 HRMS-8084	Add 'Save and Copy' button in Benefit Matrix Document Upload as Letter Template for "PSC Notice" Type
12	Release Note 2229	HRMS-8299	Modify Disable Template and Query into 'Disable Template' and 'Disable Query' in User Access
13	Release Note 2233	HRMS-8451 HRMS-8948 HRMS-8811	Flexible Employee Report Enhancement (Separate Column for both Code and Name on Spreadsheet) Add "Restrict Modify" and "Restrict Delete" Checkbox in Menu Access – Onboarding Notice Letter Template Setting Enhancement for Signing Vendor
14	Release Note 2235	HRMS-9066 HRMS-9178	Void Letter Function for Onboarding Notice Employment Contract (DocuSign) DocuSign Email Notification by Signer Level
15	Release Note 2237	HRMS-8841 HRMS-8869	DocuSign E-Signature for Personal Status Change DocuSign E-Signature for Exit Request
16	Release Note 2239	HRMS-9268 HRMS-9463 HRMS-8870 HRMS-8871	Enhance to Add Employee Range in the Append Employee 'Export with Data' Introduce AppendEmployeeAccess Control in User Access and Respect in Append Employee Basic E-Sign E-Signature for Personal Status Change Basic E-Sign E-Signature for Exit Request
17	Release Note 2241	HRMS-9383	In Flexible Exit Request/Exit Interview Report, Show Master Fields in the Language Corresponding to

		HRMS-9515	Login Language Apply Attachment in Email When Use Word Document Upload Template
18	Release Note 2243	HRMS-8944	Enhancement to the Employee Bank Detail
19	Release Note 2245	HRMS-9480	Change Description of system config PreviousWorkExperienceDerivedFromWorkExperience
		HRMS-9498	Add Language Selection in Letter Template Field List
20	Release Note 2249	HRMS-10142	Introduce New Letter Type Called "Resignation Letter" in TblLetter
21	Release Note 2251	HRMS-9329	Enhancement to the Employee Bank Detail (Personnel > Bank Detail) - PDC Part (Multi Bank Detail)
		HRMS-10067	Add Join Date filtering for "Auto Send First Time Password for New Joiner."
		HRMS-9771	Add "Auto Send Letter Template" to "Probation Apply" in Workflow Setup Screen and Add New Workflow Email Template to Probation Apply in Workflow Email Screen
22	Release Note 2253	HRMS-9865	Add Config "UseBadgeDetail" to Cater Duplicate Badge No Case

-- End of Document --