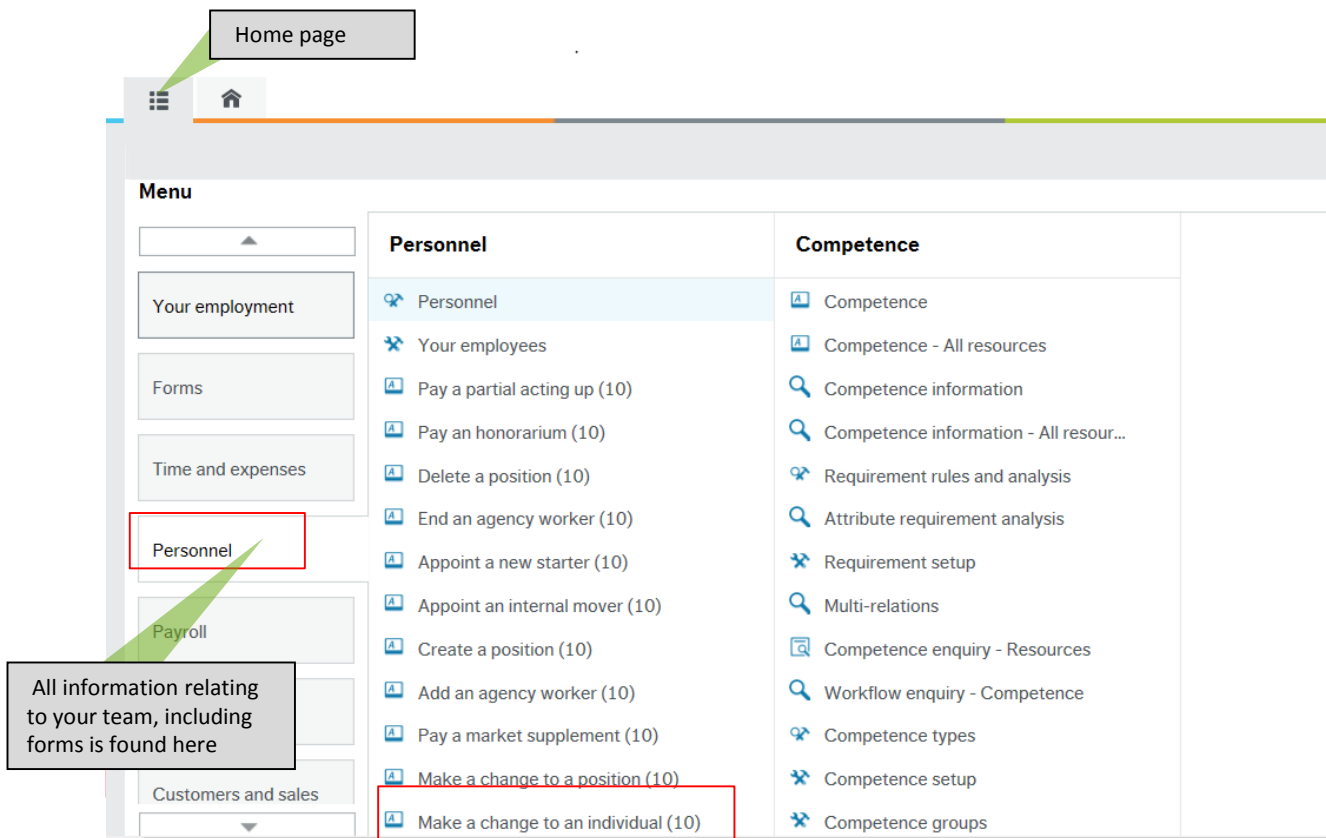


Accessing forms

As a Manager, you should use forms within ERP Gold should you wish to do any of the following

- Make a change to an individual in your team (change of hours etc)
- Make a change to a post
- Create/Delete a position
- Pay a Market Supplement
- Appoint an internal mover
- Pay an acting up
- Process a leaver
- Add/delete an agency worker
- Pay an honorarium

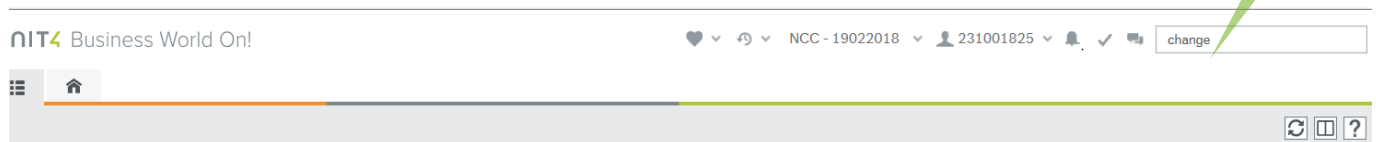
Log into ERP Gold. Click on the Home page and then the Personnel tab. This is where you will find all information and forms relating to your team. Chose the form you need from the list, for example, if you wish to make a change to an individual, for example change an employee's hours.



The screenshot shows the ERP Gold interface. At the top, there is a 'Home page' button. Below it is a 'Menu' section with a search bar and several categories: 'Your employment', 'Forms', 'Time and expenses', 'Personnel', 'Payroll', and 'Customers and sales'. The 'Personnel' category is highlighted with a red box. A callout box points to this category with the text: 'All information relating to your team, including forms is found here'. The 'Personnel' section contains a list of forms, with 'Make a change to a position (10)' and 'Make a change to an individual (10)' highlighted with red boxes. The 'Competence' section is also visible on the right, containing a list of forms. A search bar is located on the right side of the screen, with a callout box pointing to it that says: 'Enter a key word in the search box'.

Alternatively you can use the search function on the right hand side of the screen.

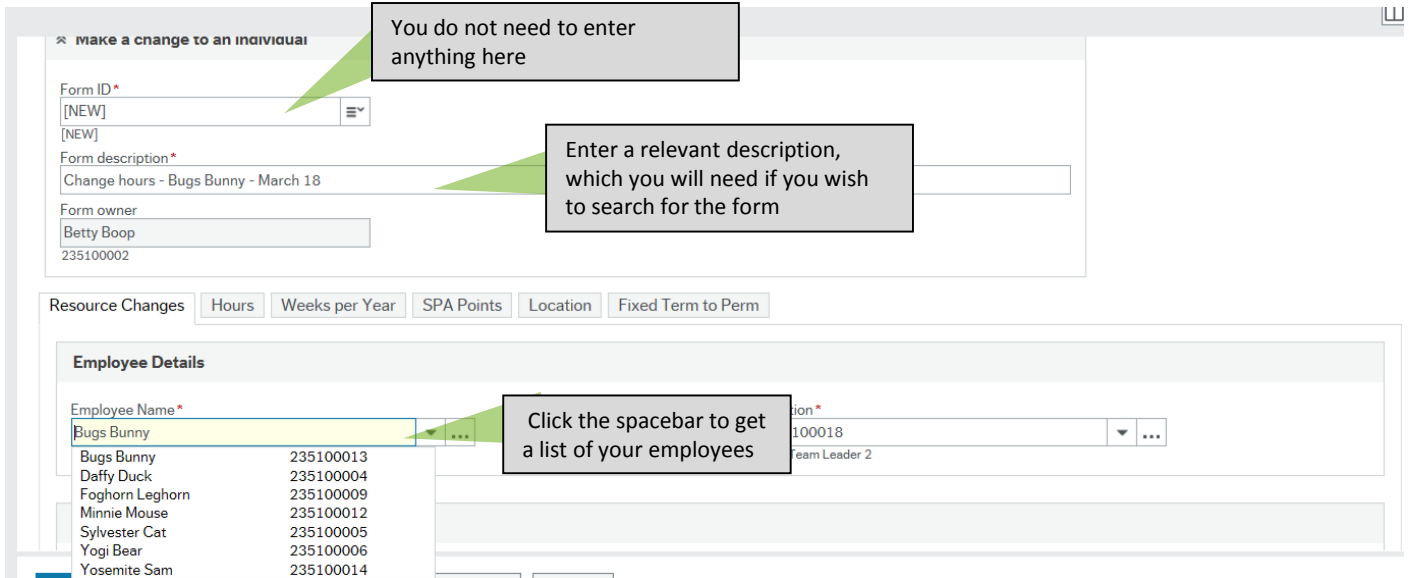
You can also add favourite forms into your favourites section.



The screenshot shows the bottom part of the ERP Gold interface. On the left, there is a 'Business World On!' logo. In the center, there is a search bar with the text 'change' entered. To the right of the search bar, there is a user profile icon and the text 'NCC - 19022018' and '231001825'. At the bottom right, there are three icons: a refresh icon, a print icon, and a help icon.

Complete the form with the required information. You do not need to enter anything in Form ID. You will need to enter a form description. This is used should you wish to search for your form so it is recommended that you include the date and the name of the employee in this.

In the name field, press the space bar to see a list of employee in your team. Select the team member you require and then select their position from the list.



make a change to an individual

Form ID* [NEW]

Form description* Change hours - Bugs Bunny - March 18

Form owner Betty Boop 235100002

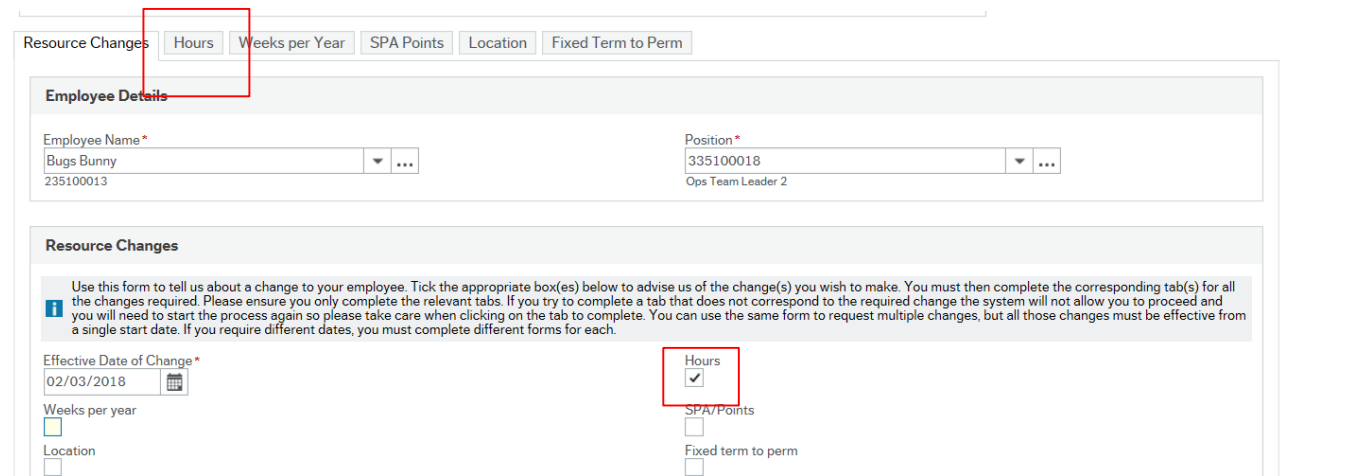
Resource Changes: Hours | Weeks per Year | SPA Points | Location | Fixed Term to Perm

Employee Details

Employee Name* Bugs Bunny 235100013
 Bugs Bunny 235100013
 Daffy Duck 235100004
 Foghorn Leghorn 235100009
 Minnie Mouse 235100012
 Sylvester Cat 235100005
 Yogi Bear 235100006
 Yosemite Sam 235100014

Position* Team Leader 2

Enter the effective date of the change and the type of change you wish to make (i.e. change in hours). Then click into the tab which corresponds to the change you wish to make. Do not try to complete any other tabs as it will cause the form to fail and need to be completed again.



Resource Changes: Hours | Weeks per Year | SPA Points | Location | Fixed Term to Perm

Employee Details

Employee Name* Bugs Bunny 235100013
 Position* Ops Team Leader 2

Resource Changes

Use this form to tell us about a change to your employee. Tick the appropriate box(es) below to advise us of the change(s) you wish to make. You must then complete the corresponding tab(s) for all the changes required. Please ensure you only complete the relevant tabs. If you try to complete a tab that does not correspond to the required change the system will not allow you to proceed and you will need to start the process again so please take care when clicking on the tab to complete. You can use the same form to request multiple changes, but all those changes must be effective from a single start date. If you require different dates, you must complete different forms for each.

Effective Date of Change* 02/03/2018

Weeks per year

Location

Hours

SPA/Points

Fixed term to perm

The form will pre-populate with the effective date and the employees current hours. Enter the new hours and whether it is a temporary or permanent change. When complete, submit the form. The form will then automatically be sent to payroll . If the form needs additional authorisation as per your organisations policy (i.e create a position form requires AD/Director sign off) it will be sent to them for approval.

Form description
Change hours - Bugs Bunny - March 18

Form owner
Betty Boop
235100002

- Resource Changes
- Hours**
- Weeks per Year
- SPA Points
- Location
- Fixed Term to Perm

Hours Details

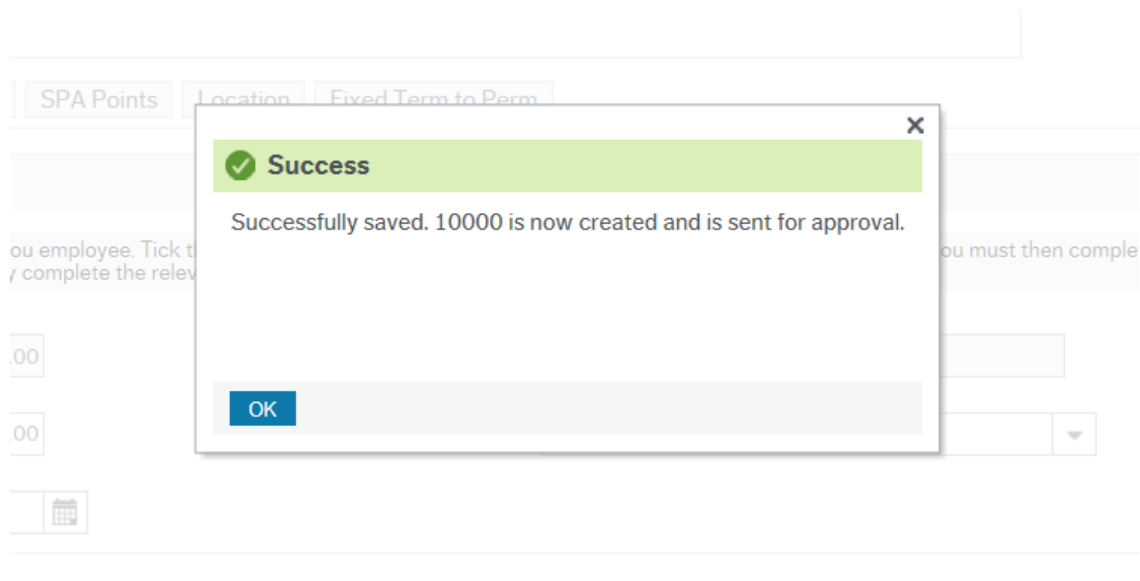
i Use this form to tell us of a change of hour for you employee. Tick the appropriate box(es) below to advise us of the change(s) you wish to make. You must then complete the cor all the changes required. Please ensure you only complete the relevant tabs.

Current Hours	<input type="text" value="37.00"/>	Effective Date of Change	<input type="text" value="02/03/2018"/>
New Hours Per Week*	<input type="text" value="0.00"/>	Duration of Change	<input type="text"/>
Date Effective To	<input type="text"/>		

- Clear
- Print preview
- Submit form**
- Save as draft
- Export

Submit the form here. You can also print preview or save as draft .

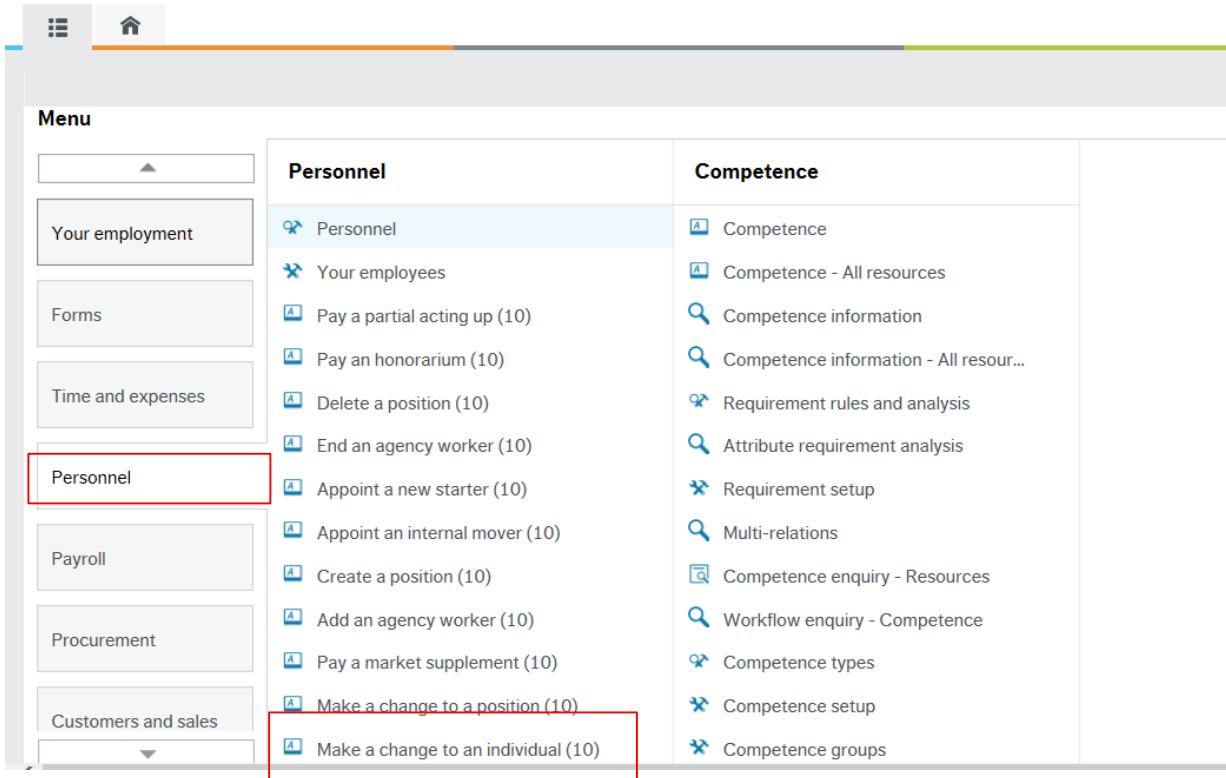
Your form will be successfully created and you will receive a reference number. This number is unique to the type of the form (i.e this number is unique to the purchase of annual leave form, you may have a different form with the same reference)



The screenshot shows the form interface with a modal dialog box in the foreground. The dialog box has a green header with a checkmark icon and the word "Success". The main text of the dialog reads: "Successfully saved. 10000 is now created and is sent for approval." At the bottom of the dialog is a blue button labeled "OK". In the background, the form's tabbed interface is visible, with "SPA Points", "Location", and "Fixed Term to Perm" tabs. The "Hours" tab is active. A portion of the form's instructions is visible: "ou employee. Tick t / complete the relev".

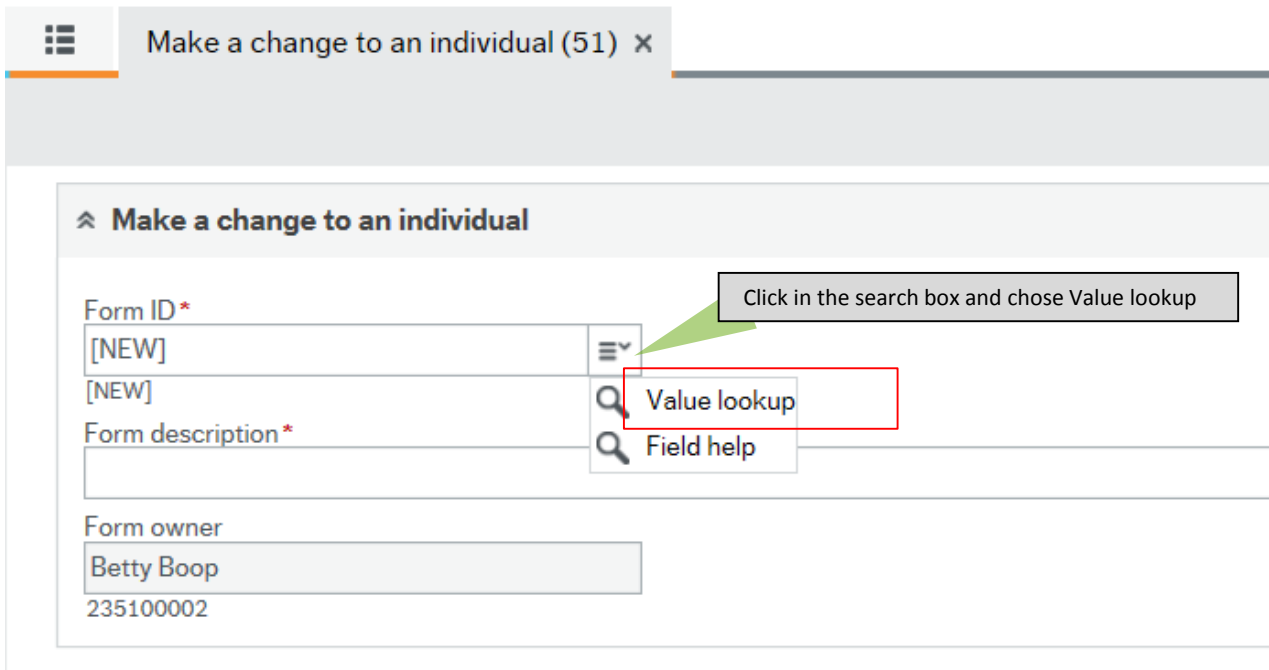
Searching for a completed form

If you wish to search for a form you have completed, you need to click on the name of the form that you are looking for, i.e. if you are searching for a change to an individual (i.e change of hours) form you have submitted, click on the form in the Personnel tab.



The screenshot shows the ERP Gold menu with two main sections: **Personnel** and **Competence**. The **Personnel** section includes options like 'Personnel', 'Your employees', 'Pay a partial acting up (10)', 'Pay an honorarium (10)', 'Delete a position (10)', 'End an agency worker (10)', 'Appoint a new starter (10)', 'Appoint an internal mover (10)', 'Create a position (10)', 'Add an agency worker (10)', 'Pay a market supplement (10)', 'Make a change to a position (10)', and 'Make a change to an individual (10)'. The **Competence** section includes options like 'Competence', 'Competence - All resources', 'Competence information', 'Competence information - All resour...', 'Requirement rules and analysis', 'Attribute requirement analysis', 'Requirement setup', 'Multi-relations', 'Competence enquiry - Resources', 'Workflow enquiry - Competence', 'Competence types', 'Competence setup', and 'Competence groups'. The 'Personnel' section is highlighted with a red box, and the 'Make a change to an individual (10)' option is also highlighted with a red box.

In form ID, click on the search box on the right hand side of the box and select Value lookup.



The screenshot shows the 'Make a change to an individual (51)' form. The 'Form ID*' field is highlighted with a red box. A callout box points to the search icon in the dropdown menu, with the text 'Click in the search box and chose Value lookup'. The 'Form description*' field is empty. The 'Form owner' field is filled with 'Betty Boop' and '235100002'.

Enter the reference number that you received when you submitted the form in the search criteria. If you can't remember this, leave this blank and click on search and you will be shown all forms of this type that you have submitted. Click on the form that you wish to see, this is where it is helpful to use a memorable description.

Make a change to an individual (51) x

Value lookup

Search criteria

Enter the form ID or leave blank to retrieve all forms

Advanced

Search

Attribute value	Attribute	Description	Period from	Period to	Status
10000	RESCHANGES	Change hours - Bugs Bunny - March 18	0	0	N

Choose the form that you wish to retrieve here

You will see the form that you have completed as well as see where it is in the workflow. This form below is currently awaiting approval, which in this case means it is waiting for Payroll to complete.

Make a change to an individual (51) x

235100002

Resource Changes | Hours | Weeks per Year | SPA Points | Location | Fixed Term to Perm

Employee Details

Employee Name *
Bugs Bunny
235100013

Position *
335100018
Ops Team Leader 2

Resource Changes

Use this form to tell us about a change to your employee. Tick the appropriate box(es) below to advise us of the change(s) you wish to make. You must then complete the changes required. Please ensure you only complete the relevant tabs. If you try to complete a tab that does not correspond to the required change the system will not allow you to start the process again so please take care when clicking on the tab to complete. You can use the same form to request multiple changes, but all those changes must have a single start date. If you require different dates, you must complete different forms for each.

Effective Date of Change *
02/03/2018

Hours

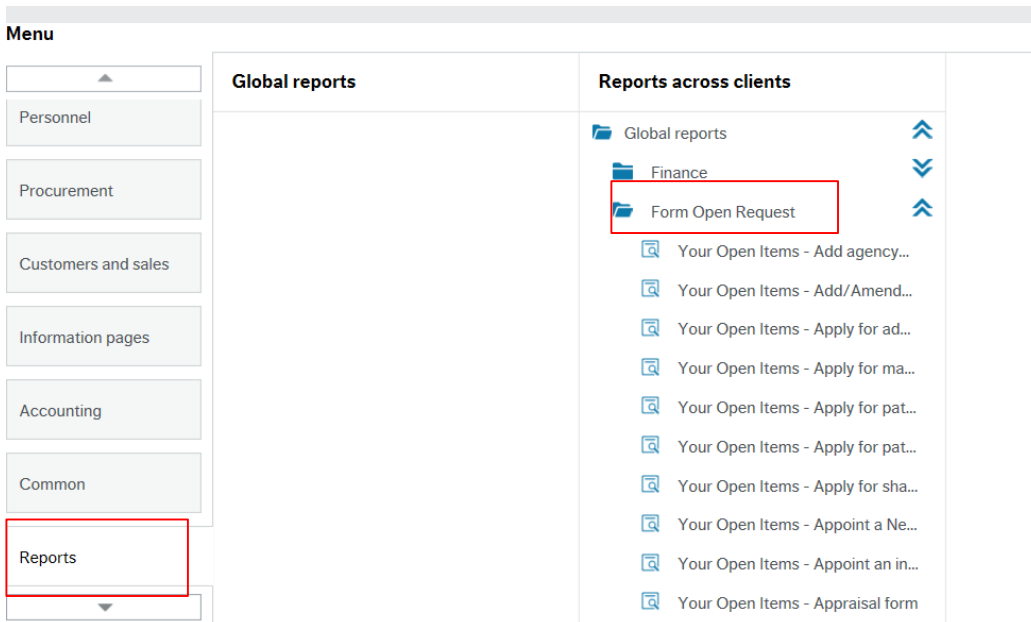
SPA/Points

Weeks per year

Clear | Print preview | Submit form | Export

i This form is currently awaiting approval.

If you do not wish to see the form but simply wish to see where it is in the workflow, click in the reports tab, Reports across clients, Form Open Request and chose the name of the form you wish to find.



Menu

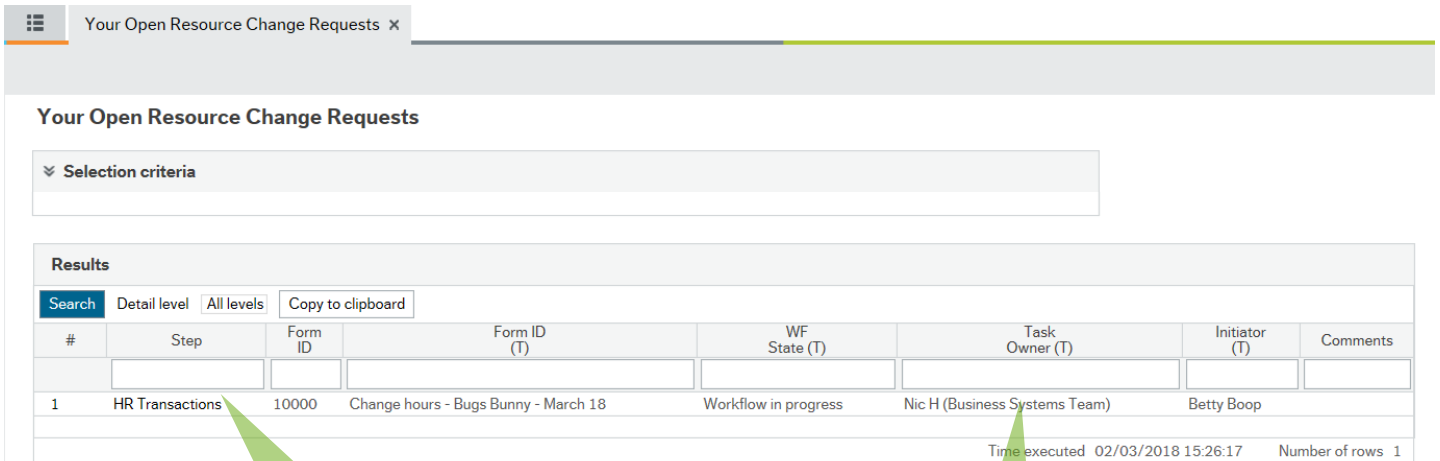
- Personnel
- Procurement
- Customers and sales
- Information pages
- Accounting
- Common
- Reports**

Global reports

Reports across clients

- Global reports
- Finance
- Form Open Request**
 - Your Open Items - Add agency...
 - Your Open Items - Add/Amend...
 - Your Open Items - Apply for ad...
 - Your Open Items - Apply for ma...
 - Your Open Items - Apply for pat...
 - Your Open Items - Apply for pat...
 - Your Open Items - Apply for sha...
 - Your Open Items - Appoint a Ne...
 - Your Open Items - Appoint an in...
 - Your Open Items - Appraisal form

This will show where the form is in the workflow (Step Column) and who the task has been sent to (Task Owner).



Your Open Resource Change Requests

Selection criteria

Results

Search Detail level All levels Copy to clipboard

#	Step	Form ID	Form ID (T)	WF State (T)	Task Owner (T)	Initiator (T)	Comments
1	HR Transactions	10000	Change hours - Bugs Bunny - March 18	Workflow in progress	Nic H (Business Systems Team)	Betty Boop	

Time executed 02/03/2018 15:26:17 Number of rows 1

This form is waiting for HR Transactions (payroll) to process

You will see the name of the person who will be processing this.