Userguide

m|ployee

POWERED BY
FORCE.COM

User Guide

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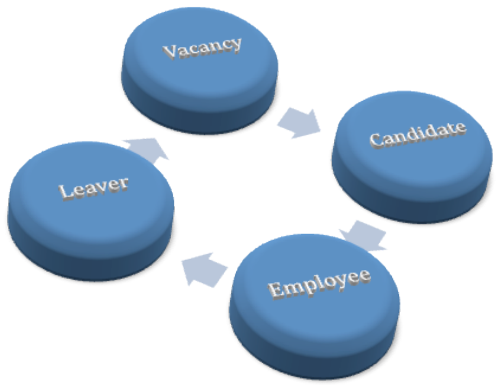
m|ployee (*) .... the new HRM

m|ployee gives meaning to HRM (Human Resource Management). By real-time visibility, but also by sharing knowledge with our chat application, m|ployee creates more efficient HR processes. m|ployee also provides a knowledge tool for the employer to learn about the quality and talent of its employees. It also gives you insight in all your personnel files and freelance contracts.

m|ployee introduces HR Management in the Cloud. Traditional software is much too expensive. With m|ployee you have an application that is easy to adapt to your needs. Moreover, it is very extensive and it communicates with Outlook, Google, etc.

The HR Life Cycle:



(*) features depend on Salesforce.com and/or m|ployee *edition*

Modern HRM

Also in the field of HR, reports become increasingly important. m|ployee provides reports directly to the strategy of the company. For example, if the intention is to accelerate recruiting staff, you can view the quality of candidates and the time that elapses until someone is productive. However, it can also be measured which labour agency performs best.

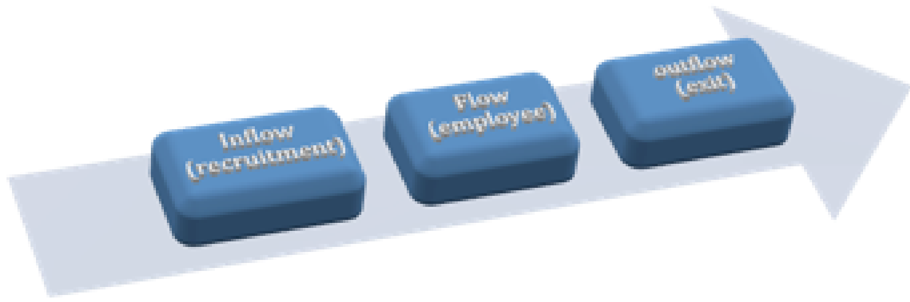
Integrated systeem

m|ployee offers an integrated system where all functions within HR can be automated. Easy to integrate with existing payroll systems, so information only needs to be entered once.

Force.com

m|ployee is developed on the Salesforce.com platform: Force.com. Salesforce.com is the worldwide leader in CRM in the cloud. This Userguide serves as a basis for the use of the m|ployee application. For questions about Force.com platform features (example: How to set up Chatter e-mail templates, agenda, tasks, etc.) we refer to the extensive Salesforce.com Userguide (click on "Help for this page" on each page or go to Set up). Of course you can also contact m|ployee (+31 478 561664 or email info@mployee.nl) or create a case at our site mployee.nl.

m|ployee will manage your HR from recruitment till retirement!



1. GENERAL INFORMATIE

1.1 m|ployee Editions

m|ployee knows different Editions. This document describes the Professional Edition. The Professional Edition has an Employee and Manager Self Service profile. For questions call: +31 478 561664 or email to info@mployee.nl.

m|ployee is special, because it is very easy to adapt to the demands of the user. The user can customize m|ployee itself. And otherwise we can help the user with this.

1.2 Free Trial m|ployee

Go to www.mployee.nl/nl/trial and you can easily start a Free Trial. Fill in all fields and you receive immediately an email with login details. By clicking on the link you can access your trial. Now you can start with m|ployee.

During the free trial period you can evaluate m|ployee before you subscribe. Your trial includes:

Sample data

When you sign up for the trial, your organization is initially populated with some sample data. To delete all of the existing data in a trial organization:

Click Your Name > Setup > Data Management > Delete All Data. This link is available only during your trial period.

After your trial period has ended, you can delete any sample data manually or with the Mass Delete feature.

Administrator privileges

The person who signed up automatically becomes the administrator. You can add another administrator when you add more users. You can add another user by using the profile "m|ployee Standard Platform User".

Features

A variety of m|ployee features.

Note:
Within 7 days after you started the trial we will contact you. If you have questions before then please contact:
+31 478 561664 or email info@mployee.nl.

1.3 Language Setting

The standard language is English. You can change the language to Dutch. Other languages are available on request. To change the language you go to Set Up|Personal Information. Click on "Edit" and scroll to "Language". Select Nederlands and klick on "Save". To get all picklists in Dutch go to: Set up|Settings for translation center and click "Enable". Then click "Edit" Dutch. You check Dutch to active and click "Save". Now all the picklists in m|ployee are also translated into Dutch.

1.4 Supported Browsers

m|ployee supports the following browsers:

BROWSER	NOTES
Windows® Internet Explorer® from version 9	m|ployee strongly recommends using Internet Explorer version 9. Apply all Microsoft®-hotfixes.
Mozilla® Firefox® from version 9	m|ployee strongly recommends using Firefox 9.
Google® ChromeTM version 17	Google Chrome applies updates automatically. m|ployee makes every effort to test and support the most recent version.
Apple® Safari® version 5.0.x	m|ployee strongly recommends using the last version of Safari. Safari does not work for uploading the employee picture in the Employee File.

Important: For all browsers you must enable JavaScript, cookies, and SSL 3.0.

m|ployee strongly recommends a minimum screen resolution of 1024 x 768 for the best possible user experience. Screen resolutions smaller than 1024 x 768 may cause issues displaying Salesforce features such as Report Builder and Page Layout Editor.

Certain features in m|ployee — as well as some desktop clients, toolkits, and adapters — have their own browser requirements. For instance the "Set Profile Picture".

Outlook & Google

Your e-mail settings

Which email service you use, send e-mails can automatically stored in the contact history of m|ployee.

Although you can directly email from m|ployee you sometimes want an e-mail or Gmail with Outlook ® and would like a copy of the mail stored in the right place in m|ployee. If you use Outlook, you can also synchronize your calendar and tasks. m|ployee makes use of the features of Salesforce.

Installing Salesforce for Outlook

1. Close Outlook
2. In Salesforce, click Your Name|Setup|Desktop Integration|Salesforce for Outlook.
3. If you want to see the email and sync settings your administrator has defined for you before you install, click View My Configuration.
4. Click Download. Then click Save, open the saved file, and complete the installation wizard. If needed, you can use the .msi version of the installer.
5. Open Outlook. The setup wizard opens, and the Salesforce for Outlook icon appears in your system tray. To manually open the wizard, right-click this icon and click Settings.
6. To log in to a Salesforce site other than the default, click Change URL and pick the correct server. If the server you want isn't listed, select Other... and enter the URL, such as a pre-release URL or a custom domain used by your organization.
7. Enter your Salesforce username and password.
8. Click Approve. This creates a secure connection between Outlook and Salesforce. You won't have to log in again unless you encounter an error. If you click Deny, you'll return to the previous step.
9. Click Next, and choose the folders you want to sync. You can use your default folders or click Change Folder and select or create a folder that's within your default folders or the main Mailbox folder.
10. Click Next, and then click Done. A welcome message appears at the system tray icon ( ), which is now active. If you're configured to sync Outlook items, all data in your selected folders syncs automatically. The icon spins to let you know when data is syncing.
11. During active use, all updates sync automatically every ten minutes. If we detect no keyboard or mouse activity for 30 minutes, we change the sync frequency to 30 minutes. After two hours of inactivity, we sync hourly, and after four hours, we sync every four hours.

For further set-up instructions and help with setting up Salesforce for Outlook, visit the Help Portal (you must log in with your Salesforce user credentials).

Watch also:
http://www.youtube.com/watch?v=Zsbz8VQ0dc4&feature=player_embedded

Activate Gmail to m|ployee

NOTE: If you already have your Google Apps domain entered into Salesforce CRM, you can skip Step 2. Watch also: http://www.youtube.com/watch?v=S2RvFIp9EnY&feature=player_embedded

1. Click Setup|Administration Setup|Google Apps|Settings
2. Configure Google Apps Domain

Click Edit next to Configure Google Apps Domain.

Enter the Google Apps Administrative Contact. This is the individual responsible for administering Google Apps in your organization.

Enter the Google Apps Domain. This is typically your company's domain, but you must Sign Up with Google first.

Click Save.

3. Activate Gmail

Click Edit next to Gmail to Salesforce.
Click the checkbox next to Active.
Click Save.
Click Send Notification Email. This action will send a notification email to your users so they know they can now use Gmail in Salesforce CRM.

How to use Gmail to m|ployee

1. Click Setup|Personal Setup|Email|My Email to Salesforce

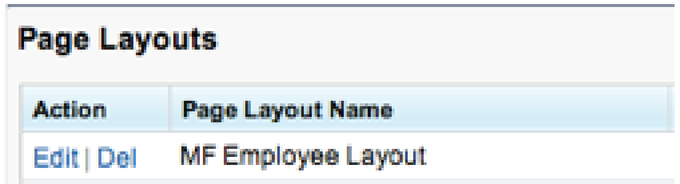
2. In the My Acceptable Email Addresses box, enter all of the addresses of your email accounts that you want to work with Gmail.

3. In the Email Associations section, set up the rules for how you want emails to be attached to records.

4. Find your Email to Salesforce Address. It should start with "emailtosalesforce@". Add this address to your address book for your convenience.

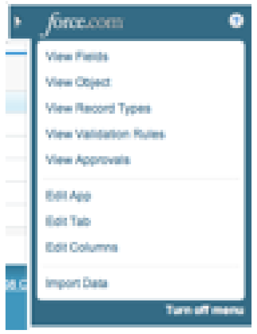
1.5 Page Layout

You can change the page layout. The layout can be customized by going to Set Up | Create | Objects. You click on the object you want to customize and scrolls to:



Click on "Edit". Now you can change the Page Layout. You can also add or remove related lists.

In the overview screen of an object you have on the right side a quick access menu. If you click the next screen pops out:



By clicking on View Object it takes you directly into the correct object. This is another way to customize your page layout.

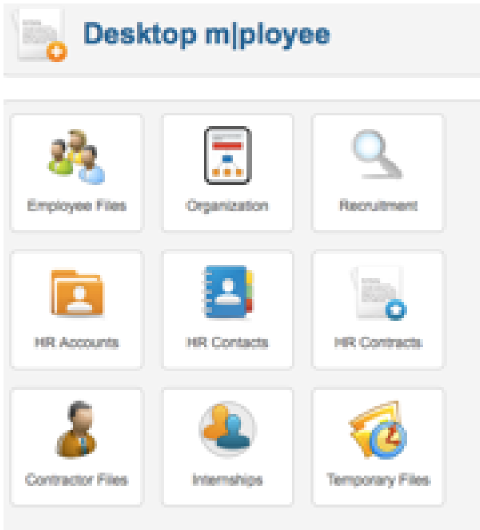
2. WORKING IN M|PLOYEE

2.1 Panels

m|ployee works with different Desktop Panels:

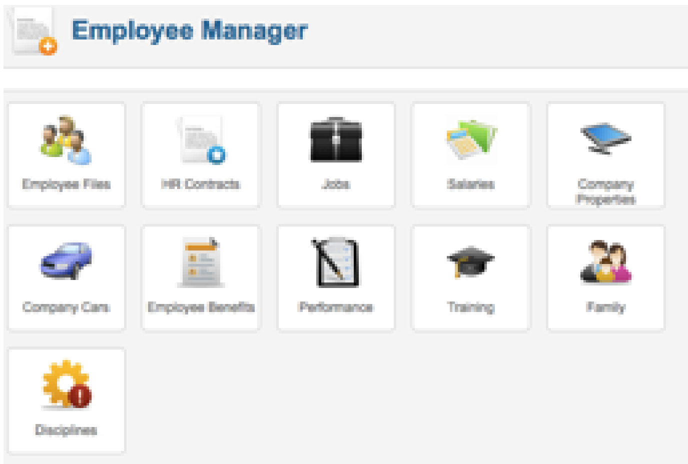
m|ployee Desktop is the first screen you will see when you enter into the application. By clicking on "Employees", "Organization" or "Recruitment" you enter into the following panels: Employee Manager, Organization Manager and Recruitment Manager. Click on HR Accounts, Contacts, Contracts, Contractor or Temporary Files and you will enter into the object directly.

Desktop m|ployee



By clicking on one of the icons in the panels you enter directly into the chosen object.

Employee Manager

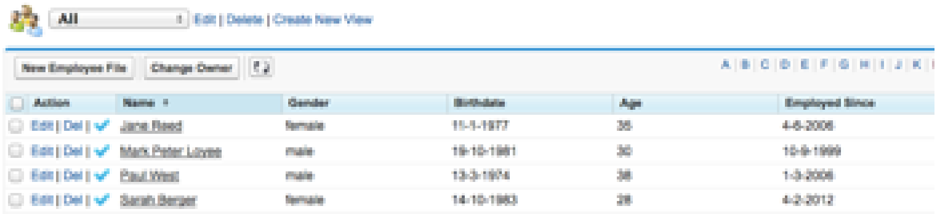


Organization Manager

Recruitment Manager

Click in the Employee Manager screen for example on "Employees Files" and you will see the following screen:

This screen shows only the recently viewed items. If you did not view any employee, then this list will be empty. Click "Go" to see all employees. Then you will see the following screen:



Use "Edit" or "Create New View" to customize the current view or create a new view. By using the letters right you can search by name (first letter).

2.2. Chatter

Chatter is unique. It is a very innovative way to communicate internally. It is similar to Facebook, but then focused on the internal communication. In one application m|ployee combines data with social innovation. By using Chatter you can reduce your email with 40%.

Each m|ployee-user has free access to Chatter. In the field of HRM you can use Chatter to:

- communicating your (HRM) strategy. With Chatter you can inform everyone in a simple way and give the employee the opportunity to give his opinion on that topic. See for example here.

- create an open communication within your organization. Let employees share successes and let them feel free to give feed back (to each other). And give them the feeling to be part of an organization and that they can directly communicate with colleagues. See for example here.

- Increase employee satisfaction within your organization. Inform your employees in an accessible way by using Chatter so they know what is happening in your organization. Moreover, the employee is able to give their comment.
- Create groups, for example the Personnel Association, and keeps members informed of recent activities.
- A very practical: Send files via Chatter and prevent flooding of email boxes. You can also enable Approvals in Chatter, which enable users to receive approval requests as posts in Chatter.
- Let your IT department start with Chatter: You'll see that the IT department no longer receives 100 emails concerning the same complaint. Furthermore, they just need to post one Chatter to give updates.

2.3 Data and documents

The more information (data) you enter, the more m|ployee will assist you in your work.

Before you start working with m|ployee we recommend you to have the following information available:

Organization

- Organization Structure (departments, functions)
- Employer (legal name, for instance "Demo Ltd")
- Description of the functions

The data of:

- Employee
- Independent Contractors/Freelancers
- Temporary Employments
- Internships

Suppliers

- Recruitment agencies
- Training institutes
- Lease Companies
- Insurance companies
- Etc

Documents

All to the employee related documents.

Data can be via a CSV imported into m|ployee. Also documents can be imported in bulk. m|ployee has a department that can help you implement data and documents. We can also help you to customize the application. Please contact:

+31 478 561664 or email support@mployee.nl.

3. GETTING STARTED WITH M|PLOYEE

3.1 Create an Organization with an Employer, Departments (or Divisions) and Functions

3.1.1 Organization

The (legal) Employer and department/divisions can be created in the Object "Organization". In the Object "Organization" you can select if the Organization is an Employer, a Division or a Department. You can also select a parent.

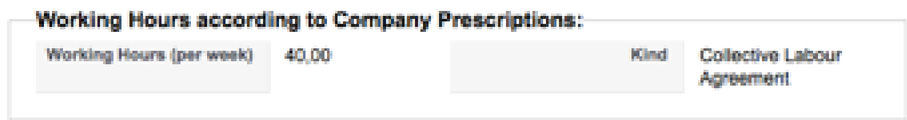
The Employer is the entity that signs the employment agreements with the employees. That is why we call this entity the "Employer". In small businesses you will find mostly just one Employer and this Employer will often be the highest in the organizational hierarchy. In larger companies there are often more employers within one organization. It is possible to create more Employers in m|ployee. An "Employer" does not have any positions. It is just a legal entity.

A division/department is for instance "Sales" or "Board of Directors" or "Plant X". The choice whether you call it a division or department is up to you. The division/department reports to its "Parent". For instance, "Sales" reports to "Board of Directors" and "Board of Directors" reports to the highest entity: the Employer.

FTE - definition

FTE means Fulltime Equivalent. It is a unit that indicates the workload of an employed person in a way that makes workloads comparable across various contexts. FTE is often used to measure a worker's involvement in a project, or to track cost reductions in an organization. An FTE of 1.0 means that the person is equivalent to a full-time worker, while an FTE of 0.5 signals that the worker is only half-time. One FTE is a full working week. A function of 0.6 FTE for example - assuming a workweek of 38 hours - a feature of 0.6 x 38 = 22.8 hours.

In the object Organizations, field "Hours Per Week", you define the full working week of your organization. We strongly recommend filling in this field, because other objects use this definition (such as Functions, Job, Salary). You can change the "Hours Per Week" per department. It is possible that one department is under a collective agreement of 38 hours per week, while another department has a 40 hours workweek. Enter into this field the workweek:


Working Hours according to Company Prescriptions:

Working Hours (per week)	40,00	Kind	Collective Labour Agreement

3.1.2 Functions

You create for each position/function (vacant/not vacant) in your organization a “Function”. So, if your company has 10 Account Managers Medical, you create 10 Functions “Account Manager Medical”. By using the “Clone” button you can clone the Function. By using “Note” you can make the Function unique.

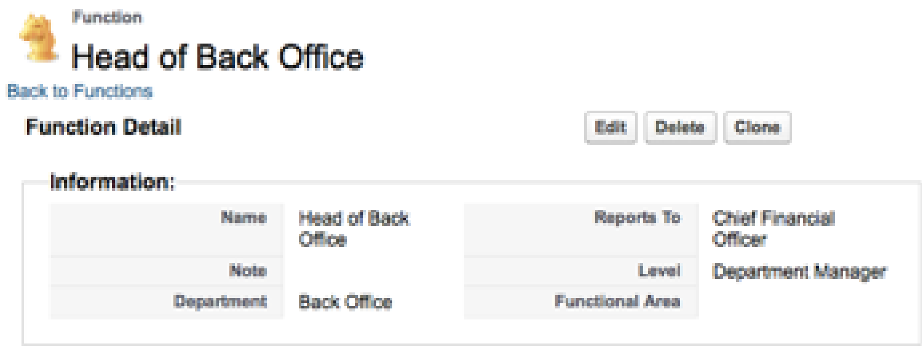
In the Function you describe all the details as salary, FTE, Reports To, Requirements, Skills etc.

In Functions you describe all your organization knows about this function (salary, Reports to, Lease car scale etc.). Do you have multiple functions with the same job description? You fully work out one function and enter a link (URL) into the other functions that link you to the first function.

A function is related to an organization (eg Department of Sales). In the Sales Department, you define the working week for that department (see FTE definition).

In the "Hours Function" field you can enter the working hours for that specific function. Is it a Part Time function then you can enter for example 20 hours. The field "FTE" is a formula field, which calculates the FTE of this position. Did you indicate that the Sales Department has a workweek of 40 hours, and then the "FTE" field will calculate 0.5. We call this the FTE factor.

Part of the Function screen:



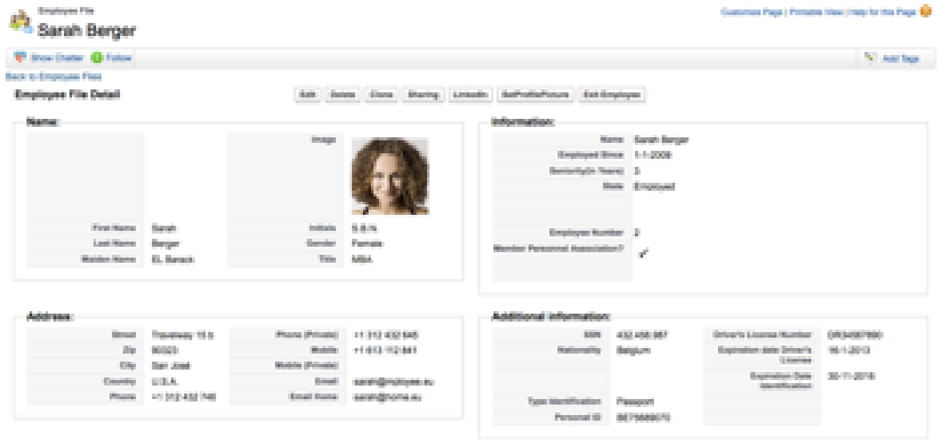
A Function has different states. If you create a new Function, you can track the new Function through the organization’s approval process (depends on your Salesforce.com and/or m|ployee Edition).

When you finish this, you know how your organization is structured.

3.2: Create Employee Files

3.2.1 Employee Files

A part of the Employee File screen:



Employees are the most important (and expensive) investments in your organization. m|ployee gives you a tool to follow the employee from recruitment till retirement.

For each employee you create an "Employee File". In the object "Employee Files" you put all the relevant employee information as name, address, birth, emergency phone, nationality, SSN etc. We also created an Exit Employee tool (see for more: Chapter 5)

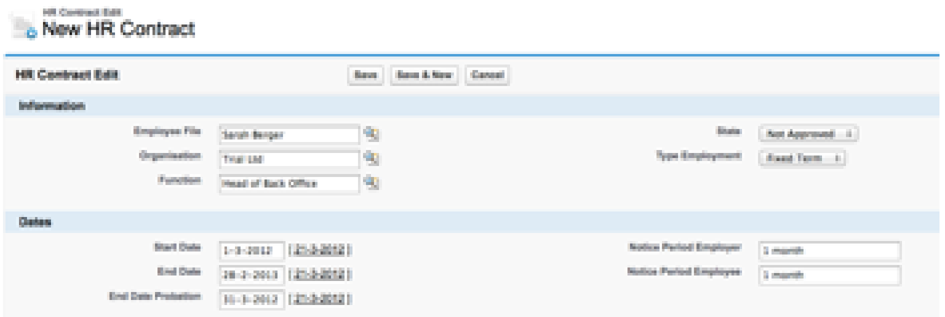
In the employee file we created also a LinkedIn button.

An "Employee File" has the following related objects:

- HR Contracts
- Jobs
- Salary
- Performance Appraisal
- Employee Benefits
- Disciplinary Grievance
- Family Members
- Training
- (Listed) Properties
- Company Car
- Mail/Activities/Documents/Attachments

3.2.2 HR Contracts

A part of de Edit screen of the object HR Contracts:



In "HR Contracts" you define the terms between employer and employee. Use HR Contracts to establish and register the employment contracts of each employee. Then, track the contract through your organization's approval process and use workflow alerts to notify the responsible person when to initiate contract renewals (depends on Edition Salesforce.com and/or m|ployee).

HR Contracts as a related list of the Employee File:

New HR Contract

Organisation	Contract Hours	Type Employment	Start Date	End Date Probation	End Date	End Date Flag
Trial Ltd	32,00	Fixed Term	1-3-2012	31-3-2012	28-2-2013	

The End Date flag gives green as long as the End Date is not met. After End Date the signal is red.

3.2.3 Jobs

The object Jobs is the junction between an employee (or a Independent Contractor or a Temporary) and a Function. Each employee has a position in the company. In the object Jobs you link an employee with a vacant position. When you link an employee (or Contractor, Temp) with an open/vacant position the position goes automatically on "Closed – Filled".

You can enter the begin/end date of the job, the working days of the employee etc.

The field "Hours Difference Function" displays the difference between the hours filled in in this Job and the defined hours in the related Function (Hours Function minus Hours Job). Obviously, for a correct calculation, you have to enter the hours in both objects.

m|ployee calculate the FTE factor (see field "FTE"). This formula field is based on the definition used in the parent Organization (Department/Division).

3.2.4 Salary

You can use Salary to register the employee's actual salary and additional fees/bonus. When a company has its own salary application it is recommended to create a link to this application.

You can simply update the salary by importing Excel Lists.

You have to fill in the full time salary. By creating a link to the Job (lookup field) you get the actual salary, based on the FTE-factor in the Job.

The other records (Expenses, Travel Allowance, Bonus, Other Payments) are <u>not</u> calculated based on a FTE-factor.

3.2.5 Employee Benefits

Use the object "Employee Benefits" to establish and document for instance the pensions of the employee or other arrangement.

You can link easily documents and/or mails to the object by using the related list "Notes and Attachments".

Attachment linked to an Employee Benefit:

Notes & Attachments New Note | Attach File | View All

Action	Type	Title
Edit | View | Del	Attachment	Levensloopregeling.pdf

This object is easily extended to a more intelligent system. Do you have any questions? Call us!

3.2.6 Performance Appraisal

Establish, register and document the Performance Appraisal of your employee.

Here you can establish and document all performance appraisals and other reviews of your employees. It is very easy to customize to your needs. Using reports, you can see how your organization (employees per department) performs and on what skills it performs well and where it may be better. Is the performance in line with your organizational objectives? If you care about reliability, did you see that reflected in the reviews of your employees?

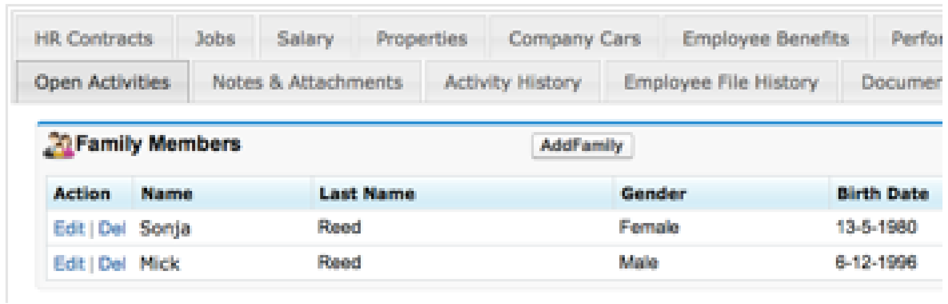
You can attach the related documents to the relevant review. You can also use the approval procedure. In the Trial you will find some sample status. The user can change these easily.

In the extended editions we include online performance management/talent management. Additionally, you can then use the extensive competency library and the talent management module.

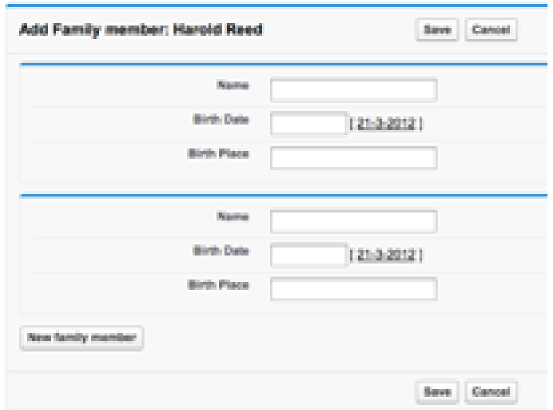
3.2.7 Family

For pension and some other arrangement HR needs family information.

The easiest way to add family to an Employee is to click "Add Family" in the Related list of the Employee File:



Then you enter the next screen and you can use the button "New family member":

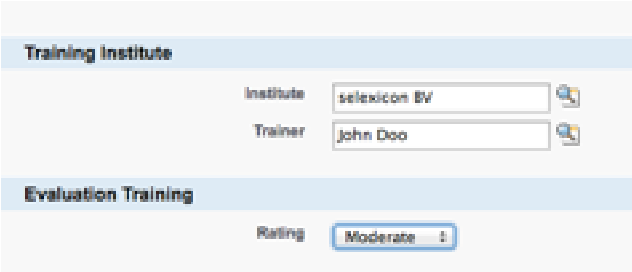


3.2.8 Training and Training Inventary

The training module in m|ployee consists of two objects: Training and Training Inventory.

The Training Inventory is a list with all the known training possibilities within the company. You can also register information of the training institute and prices etc. In fact this is the place to register all your purchase agreements with the training institutes. Training Inventory is not a related list of the Employee Object.

Part of a Training Inventory screen:



The Training object links the employee with a training listed in the Training Inventory.

By using the Training Inventory and Training object you can view the training history of the employee. But you can also view which employee has done a specific training. And create an alert when the employee has to go for a rehearsal.

3.2.9  Company Cars and Company Car Inventary

In fact, the object Company Cars and Company Car Inventory is comparable to the Training and Training Inventory.

In Company Car Inventory you register all company cars or lease cars that are in use by your organization. You can document the lease agreements between your organization and the lease company. So you know when a lease car will returns to the lease company. You have also an overview of your cars that are not in use.

You put also the lease conditions that apply to this car (between the company and the lease company) in this object. You can create an alert to notify the responsible person. Company Car Inventory is not a related list of the Employee Object.

The object Company Car Inventory has two stages: "Available" or "In Use". If you create a new Company Car Inventory, the status is on "Available".

With the object Company Cars you create the link between the car in the Company Cars Inventory and the employee. It also gives you the agreements between your organization and the employee again.

Once the link between your employee and the company will save the status in the company automatically linked to "In Use" be put.

Here you put all the conditions between your company and the employee that drives the car.

Once the link between your employee and the car from the Company Car Inventory is made the status of this car will be automatically change in "In Use".

Sample of the related list Company Cars related to an Employee:

New Company Car

Company Car	Issue Date	End Date (Estimated)	Time In Use	Lease Amount
VGMK8652	9-12-2011	8-12-2015	3 Months (Till today)	€ 800

3.2.10 Properties and Property Inventory

This module is intended to cover all company properties available in the organization, such as keys, clothes, laptops, mobile phones etc. By using this object you register them and link them properties to your employees.

This module is comparable to the Training and Company Car module.

By using a picklist (it is very simple to add this to the object) you can create property groups easily.

Laptop | Edit | Delete | Create New View

New Company Property | Change Owner

A | B | C | D | E | F | G | H | I | J | K | L | M | N

Action	Name	Property	Employee	Start Date	Expected End Date	State
Edit | Del	BF-00001	Laptop I	Roberta Green	7-11-2011	7-11-2014	Approved
Edit | Del	BF-04404	Laptop I	Andy Watson	1-1-2011	31-12-2013	Approved

3.2.11 Disciplines

The object Disciplines can be used for disciplinary actions in relation to an employee.

Examples such as being late, too much private Internet use, etc. can be very disturbing. By registering the actions, you have insight into the behavior of your employees and you can, if required, appeal the employee on his behavior. Avoid annoying discussions with your employee by recording them.

Sample of related list Disciplines related to an employee:

Disciplines | New Discipline

Action	Disciplinary / Grievance	Date Reported	Note	State	What action taken?
Edit | Del	Discipline-00004	8-1-2012	Arrived late at work (1 hour)	First Warning	Discussed it with him personally. Promised not to be late anymore.
Edit | Del	Discipline-00005	16-2-2012	Arrived late at work again (1,5 hour)	Second Warning	I discussed it with Harold again. Asked him the reason of his behavior. We will have a meeting about this later this week.

It is also possible to create a link with certain business rules, such as Internet Rules. At your request we can add it to m|ployee.

3.2.12 Notes and Attachments

You can store all kind of documents (PDF, Word, Excel, JPEG etc.) in m|ployee.

When you attach a file to a Chatter feed on a record, it is automatically added to the record's Notes and Attachments related list as a Feed Attachment. If you have a Google Apps account and it is integrated into your instance of Salesforce, you can also add or create a new Google Doc here.

This also holds the attachments from any emails associated to that record from Outlook or a Salesforce email template. Please note that the size limit for an attached file is 5MB except for Feed Attachments. The maximum size for all files attached to an email is 10MB and all file types are supported

4. RECRUITMENT

Use m|ployee also for your recruitment.

m|ployee developed the following objects:

- Vacancies
- (Internal) Candidates
- Job Application

The recruitment workflow begins with a vacant position. The position is vacant when an employee leaves the company or when the company creates a new Function. We built different stages in the approval process, before the Function is vacant.

Is the Function on stage "Open-vacant" m|ployee generates automatically a new vacancy in the object Vacancies.

You can extend m|ployee easily with more recruitment features. Questions? Call us!

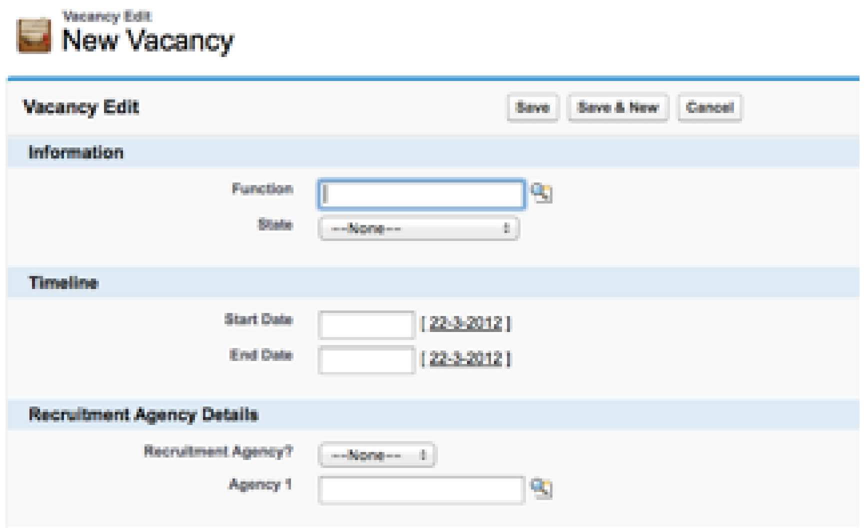
4.1 Vacancies

The object Vacancies has also different stages of approval. There is a start and end date field. By using this field you know how long certain vacancies have been open.

It has also a picklist that indicates if it is an internal (just for employees) or external vacancy.

There is a lookup to the object HR Accounts. Here you have the possibility to select the recruitment agency that is responsible for the recruitment. Because a vacancy often is assigned to more agencies we created the possibility to link 3 agencies to the Vacancy. In the Page Layout we put one agency. You can change this in the Set Up|Create|Objects|Vacancy|Page Layout.

A part of the entry screen of a New Vacancy:

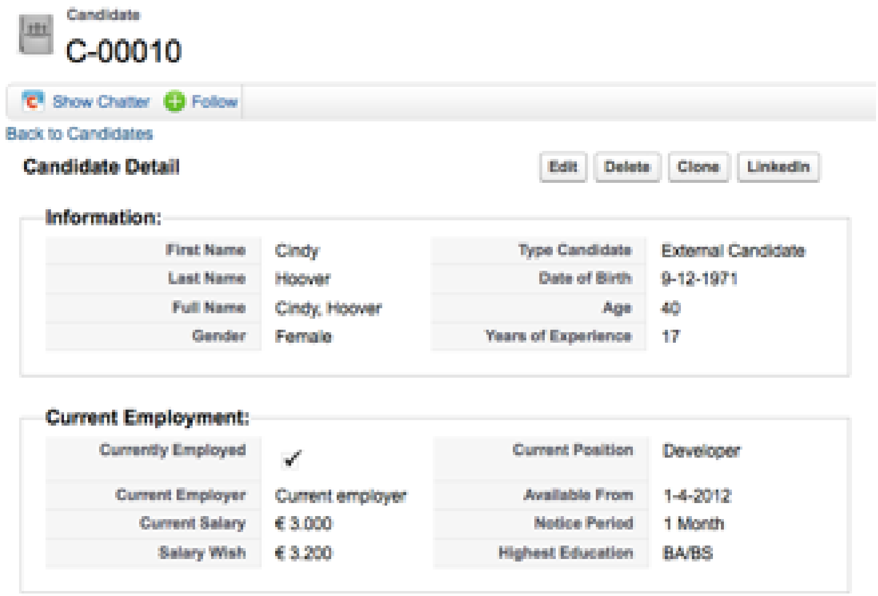


4.2 Candidates

m|ployee has two different Candidates Types: “Candidates” and “Internal Candidates” (current employees).

An Internal Candidate has a lookup to the Employee File.

Example of an external Candidate:



Candidates that apply for the position write a letter but more often they use Internet or email. You can attach the letter (after scanning) or the email attachments to the Candidate.

For an extra fee we create a custom made link to your company’s Internet site, so the candidate information can be put easily into m|ployee. Call: +31 478 561664 or email to info@mployee.nl.

You can track easily if the candidate applied directly or by a recruitment agency and which agency.

4.3 Job Applications

The Job Application is the link between the Candidate (Internal/external) and the Vacancy. The Job Application has states and you can use the workflow rules to notify the responsible person.

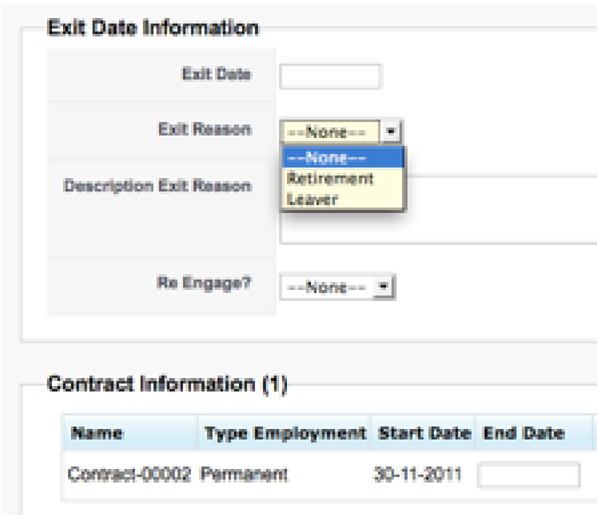
Screen with several stages:

5. Exit Employee *THE EMPLOYEE LEAVES*

In the Employee Object is a button called "Exit Employee". In the pop-up screen you can enter some data as Exit Date, the reason of leaving and whether you want to hire the employee again in the future.

You can also enter data relating to the End date of the employment contract, the salary, benefits etc.

Part of the "Exit Employee" screen:



6. CONTRACTORS (FREELANCERS), TEMPS AND INTERNSHIPS

Contractors are an increasingly important group for many companies. Registering the agreements has often no priority. However, this is of great importance. How much you pay the do the Contractors? Did you review the performance of the Contractor? Does the Contractor know his objectives?

To establish and document the agreements between Contractor and the company you can use the Contractor Object. When the Contractor is hired for an existing Function you can use the Object Jobs and link the Contractor to the Function.

For trainees (internship) we created the object Internships. There is a lookup to the Division and the Function, so you know who is responsible for the trainee. For Temps (Temporary Employments) we created the object Temps. You can link Temps with a Function.

7. HR Accounts en HR Contacts

In HR Accounts and Contacts you can manage your company's HR-suppliers, but you can also use it for your own contacts.