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The mployee process for secondment companies/staffing

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Start with Account

Session Sets

[Contacts \[0\]](#) | [Vacancies \[0\]](#) | [Opportunities \[1\]](#) | [Open Activities \[0\]](#) | [Activity History \[0\]](#) | [Notes & Attachments](#)

[Edit](#) [Delete](#) [Sharing](#) [Vacancy Wizard](#)

Account Owner  [Bert Vanaken](#) [\[Change\]](#)

Phone

Account Name [Project Account](#) [\[View Hierarchy\]](#)

Fax

Parent Account

Website



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Enter the data of the vacancy

Back Next Get Account Address			
me	Consultant	Hours Function	
rpe	--None--	Experience Level	--None--
vel	--None--	State	--None--
eet		Postal Code	

Both a position and a vacancy record are created

▼ Information

Name	VAC-00017
State	
Owner	 Bert Vanaken [Change]
Number of Applications	
test	☐

▼ Account & Contact

Account	Project Account
---------	---------------------------------

▼ Position

Function	Consultant 
----------	--

▼ Vacancy Description

Vacancy Text	Vacaturetel
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Position [View](#) [Edit](#)

Name	Consultant
------	------------



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Publish the vacancy on the website

- select the desired languages

 Vacancy Website Posting Edit
New Vacancy Website Posting

Vacancy Website Posting Edit		Save	Save & New	Cancel
Information				
Vacancy Website				
Vacancy	VAC-00017			
language	Available * nl en ▶ Chosen ◀			
Published		Published v		
Start Publishing 		15/12/2014 15:37	[15/12/2014 15:37]	
Finish Publishing 			[15/12/2014 15:37]	



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Register candidates / job application on website or enter candidates manually

Candidate Edit Help for this Page

New Candidate

Candidate Edit Save Save & New Cancel

Candidate State ! = Required Information

State To be called Linkedin Profile URL

Feedback on Status

Type Candidate

First Name Last Name Mobile Email Exellys score Jobday Date of Birth Birthplace

Highest Education School Gender Nationality Available From Contact from Registered through

If candidates apply on the website,
an Application record is made.
Otherwise create application manually

Match Edit
New Match

Match Edit

Information

Candidate 

Vacancy 

Additional Information

Start Date [15/12/2014]

Match Status 

Impression Candidate 



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The application process has various phases. This can be set up per client or set by the client himself. Workflow/Approvals/Email templates can be linked to this

Job Application Detail

[Edit](#)[Delete](#)[Clone](#)[New Employee & Secondment](#)

Origin



State



▼ Information

Name	JA-00002	Job Application State	Hired
Vacancy Name	Account Manager Germany North	Onboarding	
Vacancy	<u>VAC-00000</u>		



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Via Interview object the meetings with the candidate can be registered. Several guests can be added (Add Invitees) to the Event created by clicking on “Create Event” in the Interview record.

Calendar
New Event

Event Edit Save Save & New Task Save & New Event Check Spelling Cancel

Calendar Details

Assigned To	User ▼ Nynke Lukkes	Location	Antwerpen
Subject	Interview with Johan Bachus	Start	15-12-2014 16:00 [15:52]
Name	Contact ▼ Johan Bachus [Add to Invitees]	End	15-12-2014 17:00 [15:52]
Phone		All-Day Event	☐
Email			
Related To	Interview ▼ I-00024		
Schedule for delivery			[15-12-2014 15:52]

If a candidate is recruited the onboarding takes place with the button “New Employee & Secondment” in the Application record.

Job Application Detail

Origin



[Interviews \[1\]](#) | [Open Activities \[0\]](#) | [Notes & Attachments \[0\]](#) | [Activity History \[0\]](#)

Edit

Delete

Clone

New Employee & Secondment



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After going through the onboarding wizard, an Employee, HR Contract, Project/Assignment record is made. And Timesheet records are made that are required for the registration of time on projects. Start/End date are therefore mandatory fields in the onboarding wizard.

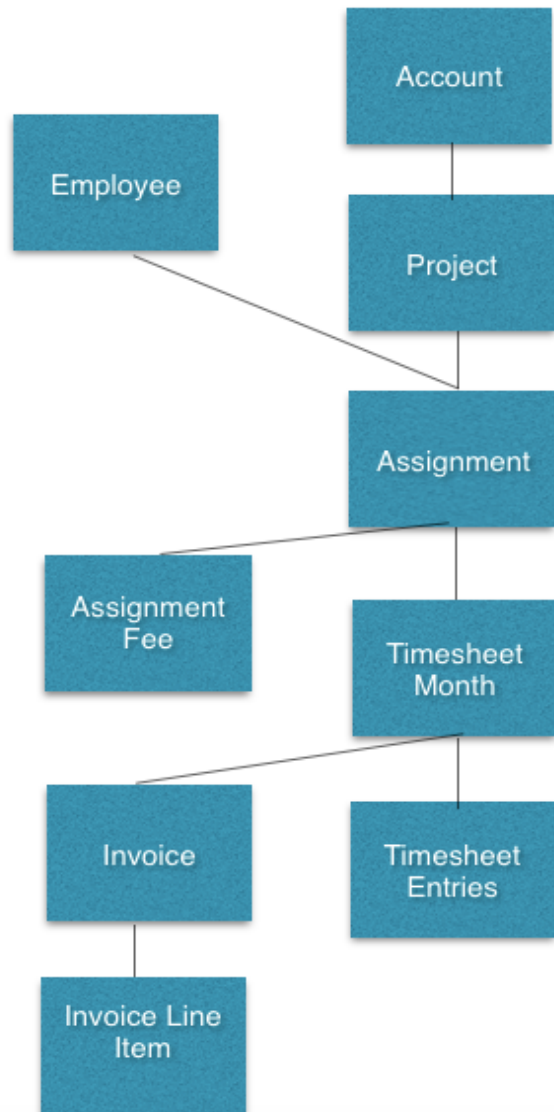
Attention!:

An Assignment Fee must be added via the related list of the Assignment (Project). Otherwise an Invoice Record cannot be made for example. The Assignment fee must be added before hours are booked on a project.

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The object structure
Account -
Project/Assignment -
Employee - Time
sheets -
Invoice



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Before hours can be registered by a user the following must be set:

1. Company Schedule
2. Company Leave
3. Company Holidays
4. Employee Schedule
5. Employee Leave & Yearly Leave Balance
6. Employee File must have a look-up to the relevant user



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Registering hours via the Time App. This page loads the projects related to the logged in user. The horizontal page can be used for the entry of total hours per day (e.g. 8.5 hours on 4 December). And represents the minimum hours the employee must work based on Roster and holidays.

1 - 30 November 2014

◀ This Month ▶ Day Week Month

Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed
01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19
Nov	Nov	Nov	Nov	Nov	Nov	Nov	Nov	Nov	Nov	Nov	Nov	Nov	Nov	Nov	Nov	Nov	Nov	Nov

📅 Not Submitted

		00:00	08:00	08:00	08:00	08:00			08:00	08:00	08:00	08:00	08:00			08:00	08:00	08:00
--	--	-------	-------	-------	-------	-------	--	--	-------	-------	-------	-------	-------	--	--	-------	-------	-------

Details 📅 1 November - 30 November 2014

Total Hours	Save	8:00	8:00	8:00	8:00		8:00	8:00	8:00	8:00	8:00		8:00	8:00	8:00
-------------	-------------	------	------	------	------	--	------	------	------	------	------	--	------	------	------



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Via the button “Details” you reach a vertical display. Depending on the setting (in Custom Setting) Start time/End time & lunch time can be entered. The hours can be divided over several types of hours (e.g. 100%, 150%, 200%, training). The hour type 150% and 200% is qualified as overtime, both for the Account and the employee. The latter is also to be set about the user

#	Date	Start	End	Time off
		09 00	17 30	00 30

Time@150%	Time@200%	Training
0 00:00	0 00:00	0 00:00



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Sickness can be registered via the Sickness tab. Leave applications via the Absence request tab. An approval process must be linked to the Absence request tab that can be made via the Set up. All the sickness days and Leave applications are visible in the monthly hours records.



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Once the monthly input meets the criterion set by you (e.g. entered hours $\geq$ total hours to be worked/Deviation is at least 0), the “Submit” button appears. By clicking the submit button all the hours of the projects displayed in the monthly overview are submitted for approval. An Approval process must be linked to this via the Set up.

A screenshot of the m|ployee interface for the month of November 2014. The header shows the date range '1 - 30 November 2014'. Below this is a large input area with a 'Submit' button on the right. To the right of the input area, there is a calendar view showing the days of the month. Below the input area, there is a 'Not Submitted' status indicator. At the bottom, there is a 'Details' button and a date range '1 November - 30 November 2014'. At the very bottom, there is a 'Total Hours' label and a 'Save' button.



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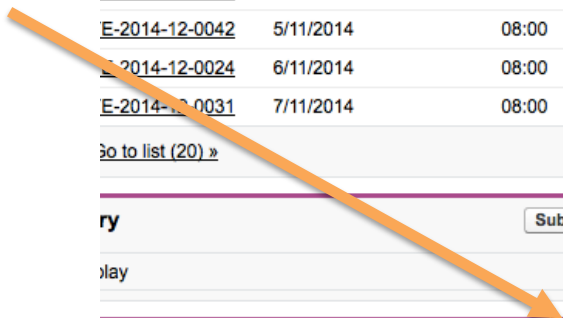
The manager receives a request for approval via email or chat (can be installed by company). If the manager goes to the record linked to the approval, he can choose on the button “Approve”. He here sees the monthly overview of the relevant employee. He chooses “Approve” or “Reject”.

	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sa
	01	02	03	04	05	06	07	0
	Nov	Nov	Nov	Nov	Nov	Nov	Nov	No
Software ontwikkelaar Project Account			8	8	8	8	8	
1 November - 30 November 2014								
Total Hours			8:00	8:00	8:00	8:00	8:00	

Once the monthly display has the status “Submitted” the Print button appears. Via Custom Setting an adjusted visual force page is linked to the overview of the hours.

	Wed	Thu	Fri	Sat	Sun
	01	02	03	04	05
	Oct	Oct	Oct	Oct	Oct
Print	08:00	08:00	08:00		

After the monthly record has the status “Approved” an Invoice record can be made via the related list of the approved Time sheet record. The Due Date is defined with Invoice date + days to be entered via a Custom Setting (e.g. 14 days). The invoice number can obtain automatic numbering via a new field to be created and a workflow that the field “Invoice Number” update.



Time	Date	Description	Duration	Duration in seconds	Duration in hours	Unit	Created by	Fee per hr
E-2014-12-0040	3/11/2014		08:00	28.800	8,00	☐	Bert Vanaken , 15/12/2014 18:01	
E-2014-12-0032	4/11/2014		08:00	28.800	8,00	☐	Bert Vanaken , 15/12/2014 18:01	
E-2014-12-0042	5/11/2014		08:00	28.800	8,00	☐	Bert Vanaken , 15/12/2014 18:01	
E-2014-12-0024	6/11/2014		08:00	28.800	8,00	☐	Bert Vanaken , 15/12/2014 18:01	
E-2014-12-0031	7/11/2014		08:00	28.800	8,00	☐	Bert Vanaken , 15/12/2014 18:01	

[Go to list \(20\) »](#)

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lay

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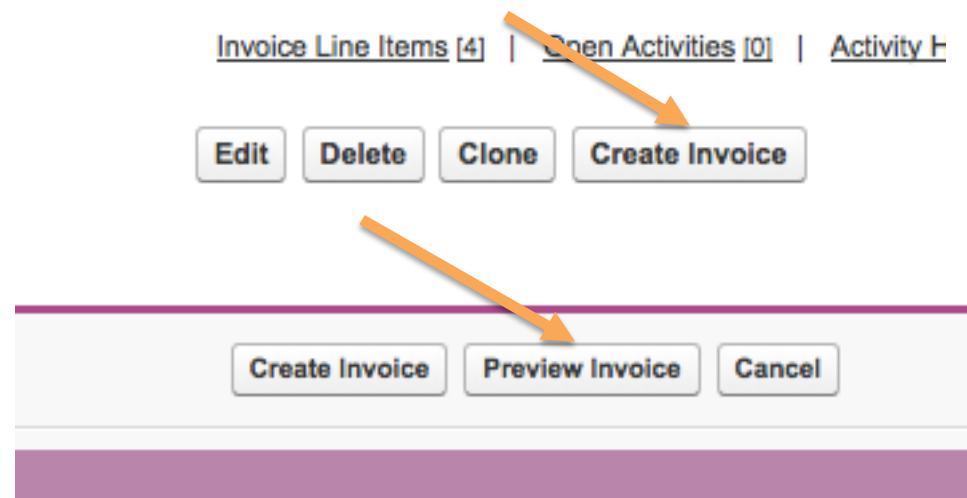


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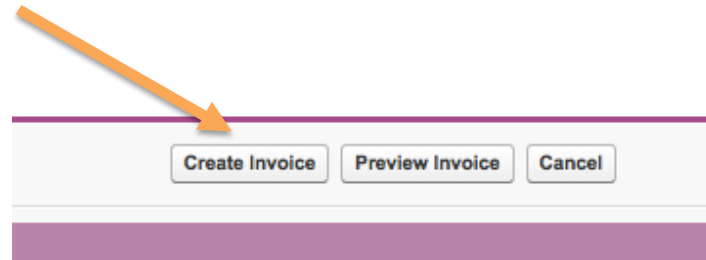
Once the Invoice record is stored Invoice Line items are automatically created by type of hours. These have to be set via Custom Settings. The Type field in Invoice Line item is a choice list field that must be converted via the Set up.

New Invoice Line Item				
Type	Fee per Hour	Sum Hours	FeeSum	
@100%	65,00 €	175,75	11.423,75 €	
@150%	97,50 €	1,00	97,50 €	
@200%	130,00 €	3,00	390,00 €	

Via the button “Create Invoice” in the invoice record you reach the overview page of the invoice. Via “Preview Invoice” you can see an example of the invoice.



The invoice texts can be customised via Custom Labels in Set up. If you click on “Create Invoice” the invoice is stored as a pdf- attachment under the Invoice record.



Notes & Attachments				New Note	Attach File	View All
Action	Type	Title	Last Modified			
Edit View Del	Attachment	invoice_V1.pdf	16/12/2014 12:10			



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The entered hours are also the base for possible Time for Time and/or Overtime. Once the monthly Time sheet is approved, a deviation record is made under the Employee Yearly Leave Balance of the relevant employee. The deviation record is intended as intermediate object. Here the user can decide what happens with the hours from the Timesheet.



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The Duration in Days/Hours displays the hours the employee has worked extra in the relevant month than necessary based on their roster/holiday/sickness etc. The hours in the Overview hours section are the real overtime. It will be defined by user/client which values ultimately are included in the Leave Balance of the employee and which will possibly be paid out.

Deviation Detail

[Edit](#) [Delete](#) [Clone](#)

Name	9 2014	DurationinDays	2
EmployeeYearlyBalance	<u>EYB-000002</u>	DurationinHours	16,00
▼ Approval			
approvalDateSubmitted	16/12/2014	approvalState	not-submitted
approvalDateApproved	16/12/2014		
▼ Overview hours			
Hours @100%	184,75	Hours Total @ 100%	184,75
Hours @150%	2,25	Hours Total @150%	3,38
Hours @ 200%	3,00	Hours Total @ 200%	6,00
Hours Training @ 100%	0,75	Hours Total Training @100%	0,75



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Profiles and owners of records are important to create the appropriate ESS structure. The best in this situation is to make the employee the owner of their own Employee File. If the OWD is set to “private” the employee has exclusive access to only their own Employee File. Triggers can also be added that ensure that e.g. the Employee Leave (Balance) & Assignment record have the same owner as the Employee File: the employee.



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Types of leave:
Regular leave (Regular)
Overtime
Special leave (Special)
Unpaid leave (Unpaid)



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The Employee Yearly Leave Balance is updated after the approval of an application for leave (Absence request) by adding deviations. If for example someone applies for regular leave a deviation is created with type indication `absence_regular`. These `absence_regular` hours are deducted from the balance the employee has in his Employee Yearly Leave Balance (Available Leave)

Other types of leave (`parentType`):

`absence_overtime`, is deducted from the overtime hours balance

`absence_special`, no consequence for the balance/can be included via

Roll up field in balance

`absence_unpaid`, see `absence_special`



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