



Jade Star Functionality Overview

www.empower-hr.com

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1. Empower HR Limited

The critical nature of HR and Payroll processing demands the highest standard of accuracy and reliability, every payday. Empower HR Limited (Empower) specialises in providing such a service for many companies throughout New Zealand, utilising a solution known as Jade Star.

The Jade Star software was developed in New Zealand for New Zealand and is managed and supported by a dedicated team of New Zealand experts.

A dedicated, highly specialised product development and support team provides:

- Account management
- Business analyst and consultancy services
- Procedural review and audit services
- Project management and implementation services
- Software development, client requested customisations, ongoing product enhancement and legislative changes
- Qualification, regression and acceptance testing
- Application support through a specialist Help Desk from 8am to 5.30pm on business days

The majority of the team have spent most of their working lives in the HR and Payroll sector - in user, management, consulting and programming roles as well as having worked for alternate supplier organisations. Our value-add is our in-depth knowledge of the requirements in the people management systems sector, gained from our own experience and through our relationships with client organisations who represent virtually every industry sector.

Empower also draws on the experience and expertise of the other divisions of its parent company - Jade Software Corporation - to provide a full service delivery. Dedicated HR and Payroll expertise is supplemented by technical, operations, computer management resources who are responsible for the infrastructure and software systems management aspects of our outsourcing service, including:

- Integration
- Systems management
- Facilities management
- Disaster recovery

Our success has been built on our commitment to deliver mission critical services 24 hours a day, 365 days of the year.

2. Empower Service Options

A real-time solution, access to up-to-date information at all times supports a variety of deployment scenarios:

- Centralised HR and Payroll operations
- Centralised Payroll and decentralised HR operations



- Centralised HR and decentralised Payroll
- Decentralised HR and Payroll.
- Offshore, nation-wide, multi-site clients access needs are easily accommodated

2.1 Run-time Licence

The Jade Star software is installed on client owned and managed hardware. Empower provides a software support and upgrade service, including the shipment of enhancements and legislative changes.

2.2 Software as a Service (SaaS)

Clients are provided with online access to our Jade Star software for input, inquiry, processing and reporting purposes. The software resides on production, test and disaster recovery servers that are owned and managed Empower.

2.3 Payroll Administration Service

This is an option to outsource the payroll system administration function and is ideally suited to organisations:

- Requiring a comprehensive payroll solution without the administrative commitment
- Wishing to deploy staff onto other activities. The need for specialist in-house payroll staff is eliminated. Staff and management are freed to focus on more profitable activities
- Wanting to eliminate the need for backup payroll expertise to cover staff away sick or on holiday

Our Jade Star Software as a Service option underpins this service.

3. Jade Star Product History

3.1 Background

Jade Star has been developed as an integrated Human Resources and Payroll solution, designed to handle the payroll and HR processing of medium to large organisations, in both an in-house licensed or outsourced environment. Key solution design objectives include:

- Accommodating complex payroll and HR requirements without the need for large scale customisation
- Reducing administrative processing time
- Easily accommodating future workforce changes

Built with the intention of simplifying the Human Resources administrative function, Jade Star software capability spans:

- Payroll
- Leave Management



- Roster Management
- Time and Attendance
- Health & Safety including Drug and Alcohol Management
- Contract Management
- Employee Profile including Gift and Conflict Registers
- Organisation and Position Management
- Remuneration Management including Rewards and Recognition
- Recruitment including e-Recruitment
- Training and Development,
- Performance Management and Career Planning

Not only does Jade Star enable an organisation to reduce the administrative time, effort and cost of looking after their staff, it also provides rich real-time information for management. In addition to a large number of standard reports, a flexible and easy to use ad-hoc reporting tool, as well as a graphical Manager's Dashboard module is also provided.

Employee and manager Self Service capability provides easy access via the Intern to selected information as well as a variety of workflow processes and libraries.

A regular software enhancement program is in place and includes the timely implementation of legislative changes.

Whilst offering a high degree of functionality without the need for software modification, a quality software customisation service is available to accommodate client specific change requests. The application and security design of the system enables client customisations to be maintained within the one source. This then provides a tightly managed and supported upgrade path for both client and core system releases.

3.2 Proven Ability and Experience

The critical nature of human resources and payroll processing demands the highest standard of accuracy and reliability, every payday. Our success has been built on our commitment to deliver mission critical services 24 hours a day, 365 days of the year.

With clients representing virtually every industry sector, we understand the needs of the market very well and are committed long term to the Payroll/HR business.



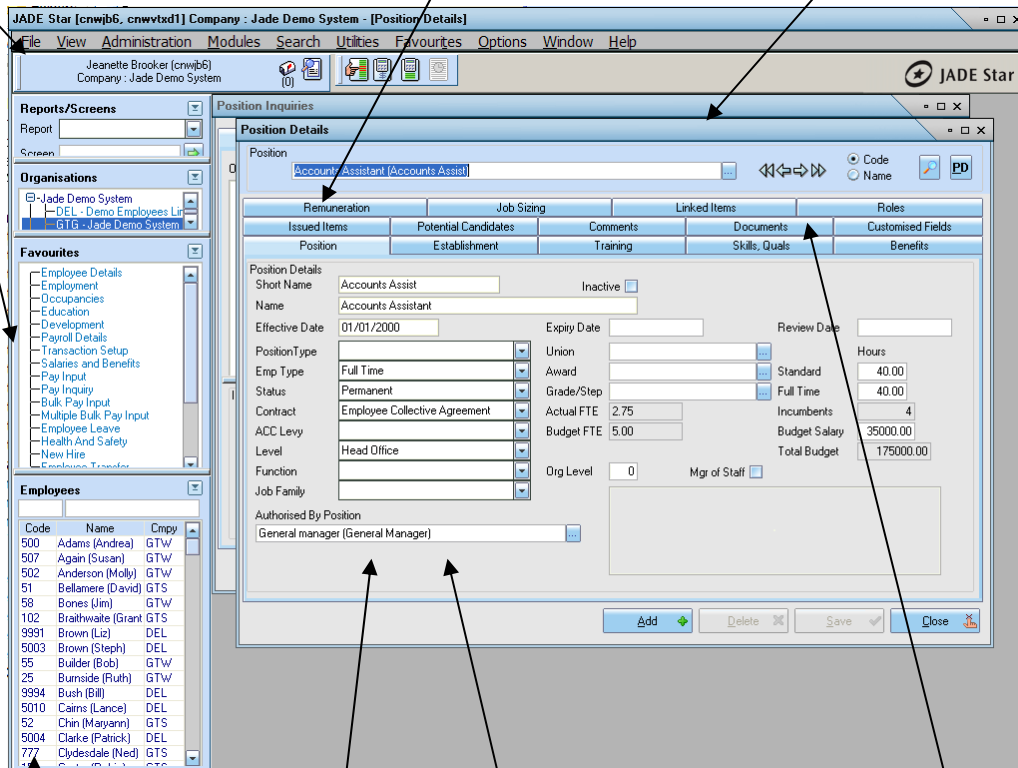
4. Jade Star Functionality

4.1 Solution Overview

Able to navigate to screens via the menu items or set up favourites for quick/one click screen selection

Each module consists of folders contained in a form, to give the user the ability to easily view the data required within the module.

Multiple screens can be open at one time e.g. cascade or tiled view



Able to user define the screen/toolbar display, for example remove the items shown on the left-hand menu, change colours etc

Ability to access electronic documentation on the client LAN/ WAN, e.g. using position management user is able to link the position description, company policy document, contract etc

Ability to automatically create organisation charts based on the position management structure, identifying actual vs. budget FTE

Fully Integrated system, for example position data flows through to the incumbent occupying the position etc.

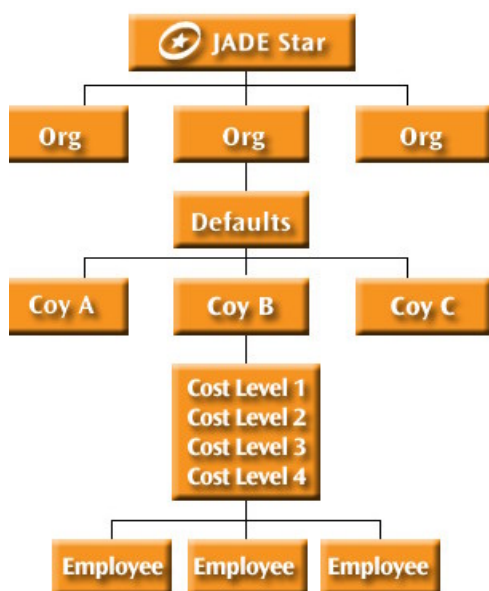
As an integrated HR and Payroll solution, common data is only entered once preserving system integrity.

- Sophisticated multi-level security features enable user access to be restricted to selected screens, reports and groups of employees e.g. a specific cost centre; and against each screen access can be limited to "view only" or maintenance functions
- On-line real time system with up-to-date information available at all times
- Comprehensive HR functionality supports the management of the complete employee lifecycle – from recruitment to termination
- On-line validation of input enables errors to be corrected at time of entry



- On-line pay calculations substantially reduce the time required to calculate net pays
- Ability to re-run selected payslips in the payroll as required to achieve 100% accuracy
- Comprehensive on-line inquiries and flexible ad-hoc querying and reporting capabilities including a Report Writer for customising reports
- Integrates with word processing and spreadsheet packages
- Regular upgrade/enhancement program with client input encouraged
- Legislative changes incorporated at no additional cost
- Standard underlying technology functionality includes on-line/off-line backups, automatic recovery, roll forward and recovery from transaction logs
- Disaster recovery service for clients utilising our SaaS and Payroll Administration services
- Integration with third party applications such as Finance Systems (batch file, web services integration supported)
- Self Service access for management and employees, including data capture and workflow approval processes
- Integrated diary and reminders functionality
- Letter management functionality enables letters to be easily generated without the need to extract and mail merge data
- Time attendance and roster business rules can be configured to meet client eligibility and approval requirements, and then update payroll automatically
- The suite of standard reports is supplemented by an in-built Report Writer tool for ad-hoc reporting and query
- Manager Dashboard module, which provides management with a graphical view of selected reporting and KPI data

4.1 File Structure



Multi-organisation database supported by stringent security. Objective to avoid set up duplication with tables e.g. tax tables being stored at the highest possible level

Supports a global view of the organisation e.g. centralised HR function, decentralised payroll, global reporting

Used to establish tables applicable to multiple files e.g. transaction formulae; contract rates, rules and conditions; skills, qualifications, training courses, costing etc

Multiple companies can be established and may represent a payroll type, may be a subsidiary company, may be geographic. Each company refers to the default company (if linked) for any standards, tables etc. Alternatively tables can be established at company level and may be used to over-ride default company set up

Within each file a four-tiered costing structure (soft coded descriptions) can be established. Supports cost analysis and reporting across multiple files. General ledger interfaces, including accruals, can be provided

Employee level data will over-ride any defaults set at a higher level

Benefits

- Reduces initial set up and therefore implementation timeframes
- Easy ongoing system maintenance
- Enforces system consistency, reducing errors and rework
- Highly specific cost breakdowns/analysis available
- Time savings with the reduction of repetitive tasks
- Multi-dimensional reporting flexibility:
 - Across all files i.e. at organisation level
 - By company/payroll or across multiple companies/payrolls e.g. fortnightly and monthly payrolls
 - At cost level 1, 2, 3, 4 or across a range of cost level 1s, 2s, 3s, 4s
 - Any combination of the above
 - Across structures (other than costing based)

4.2 Roster Management

The screenshot shows the 'Roster Manager' application window. The title bar reads 'Roster Management - [Roster Manager]'. The menu bar includes 'File', 'Administration', 'Management', 'Reports', 'Windows', and 'Help'. The main window displays a roster for the 'SI - South Island Ops Group' with a 'JADE Star' logo in the top right. The roster is titled '12 Hour Roster ending 17/06/07 (Version 2) 4/06/2007 - 17/06/2007 - [Actual]' and is for 14 days starting on 04/06/2007. The roster grid shows employees and their assigned shifts (D12 07:00, N12 19:00, N12 07:00) across days from Mon 04/06 to Sun 17/06. Below the employee roster is a 'Shift' section showing the details for D12 and N12 shifts, including crew assignments like 'A Crew Sou', 'B Crew Sou', and 'A Crew Sou'.

Employee	Mon 04/06	Tue 05/06	Wed 06/06	Thu 07/06	Fri 08/06	Sat 09/06	Sun 10/06	Mon 11/06	Tue 12/06	Wed 13/06	Thu 14/06	Fri 15/06	Sat 16/06	Sun 17/06
5025 - Hendry (John)	D12 07:00	D12 07:00	D12 07:00	D12 07:00	D12 07:00			N12 19:00	N12 07:00	N12 07:00	N12 07:00	N12 07:00	N12 07:00	
5012 - Murray (Paul)	D12 07:00	D12 07:00	D12 07:00	D12 07:00	D12 07:00			N12 19:00	N12 07:00	N12 07:00	N12 07:00	N12 07:00	N12 07:00	
5016 - Owen (Gary)	N12 19:00	N12 19:00	N12 19:00	N12 19:00	N12 19:00	N12 07:00		D12 07:00	D12 07:00	D12 07:00	D12 07:00	D12 07:00		
5013 - Tub (Wayne)	N12 19:00	N12 19:00	N12 19:00	N12 19:00	N12 19:00	N12 07:00		D12 07:00	D12 07:00	D12 07:00	D12 07:00	D12 07:00		

Shift	Mon 04/06	Tue 05/06	Wed 06/06	Thu 07/06	Fri 08/06	Sat 09/06	Sun 10/06	Mon 11/06	Tue 12/06	Wed 13/06	Thu 14/06	Fri 15/06	Sat 16/06	Sun 17/06
D12	A Crew Sou	A Crew Sou	A Crew Sou	A Crew Sou	A Crew Sou			B Crew Sou	B Crew Sou	B Crew Sou	B Crew Sou	B Crew Sou	B Crew Sou	
N12	B Crew Sou	B Crew Sou	B Crew Sou	B Crew Sou	B Crew Sou			A Crew Sou	A Crew Sou	A Crew Sou	A Crew Sou	A Crew Sou	A Crew Sou	

Functionality Summary

- Roster Management is a fully integrated module that records and maintains roster details
- Setup templates are used to define rosters, shifts, shift segments and segment patterns
- Roster shift patterns and crew patterns can be easily established
- Default minimum, safety and maximum shift staffing requirements and levels can be set



- Full drag and drop functionality to add shifts to rosters and employees to shifts
- Full drill down functionality from Roster to Roster Details to Shifts to Shift Maintenance
- New rosters can be created from templates or cloned from existing rosters, with or without employee detail
- Graphical interface for roster maintenance provides a comprehensive full period view
- Colour coding used to highlight multiple shifts, leave, staffing level, weekends, holidays etc
- Authorised users (e.g. Shift Managers/Supervisors) can maintain required and actual date/time variations and leave (e.g. sick, bereavement) to the published roster
- Employee roster details and updates can be viewed online, printed, published to employee Self Service or emailed to the employee

Benefits

- High degree of flexibility in the building of ad-hoc and rolling shift and roster templates easily accommodates simple to complex roster requirements
- Roster changes easily applied with the use of drag and drop functionality and a point and click graphical interface allowing drill down to maintenance forms
- An end-to-end solution, employee masterfile data, skills and qualifications are entered once only and available for use by roster staff as well as HR, payroll and Self Service users
- Full integration with Time & Attendance and Payroll allows for seamless transfer of the finalised roster to time and attendance and processing to payroll
- Improved management of labour costs with the ability to cost the roster
- Improved compliance with employment rules established and taken into account when rostering e.g. ensuring a minimum 10 hour break between finish and start times of a new shift

4.3 Time & Attendance

Status	Start Date	Start Time	End Date	End Time	Paid Hours	Prof Cntr	Leave Code	Is Paid	Is Worked
	19/03/2007	08:00	19/03/2007	16:00	8.00			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	20/03/2007	16:00	21/03/2007	08:00	16.00			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	22/03/2007	16:00	23/03/2007	08:00	16.00			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	24/03/2007	08:00	24/03/2007	16:00	8.00		S	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	25/03/2007	07:00	25/03/2007	00:00	17.00			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	26/03/2007	08:00		15:00	7.00			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Total Payable Hours								72.00	

Type	Rule	Error	Warning Only
T (25/03/2)	Long	Hours calculated for the day exceed 16.	Yes

Type	ID	Name	Variables	Value	Sy Ge
T (19/03/2007)	Ord	Ordinary Hours	HOURS	8.00	Yes
T (20/03/2007)	Meal	Overtime Meal Allowance	UNIT	1	Yes
T (20/03/2007)	Meal	Overtime Meal Allowance	UNIT	1	Yes
T (20/03/2007)	Ord	Ordinary Hours	HOURS	8.00	Yes
T (20/03/2007)	Time1.5	Time and a half overtime	HOURS	3.00	Yes
T (20/03/2007)	Time2.0	Double time overtime	HOURS	5.00	Yes
T (22/03/2007)	Time2.0	Double time overtime	HOURS	8.00	Yes
T (24/03/2007)	SK	Sick Leave	HOURS	8.00	Yes
			STDATE	24/03/2007	
T (25/03/2007)	Meal	Overtime Meal Allowance	UNIT	2	Yes
T (25/03/2007)	Time2.0	Double time overtime	HOURS	17.00	Yes
T (26/03/2007)	Ord	Ordinary Hours	HOURS	7.00	Yes

Functionality Summary

- Powerful and flexible rule-sets for ordinary, overtime, allowances, leave, statutory entitlements etc, can be established at multiple levels
- Rules can be easily tailored to cater for multiple organisation contract/agreement structures, as well as other requirements such as 'role performed'
- New rules can be loaded in advance in preparation for forthcoming contract/agreement changes, and automatically applied once the effective date is reached
- The Employee Timesheet provides a consolidated view of all input, which may have been captured in a number ways:
 - Directly into the employee timesheet
 - Via a bulk entry timesheet
 - Via a data capture device such as a finger-scan/swipe-card unit
 - Via a roster
 - Via the Self Service module with a workflow approval process set up to automatically forward the completed timesheet to the employee's manager/supervisor for online approval prior to updating payroll
- Errors/warnings can be established to highlight exceptions, enabling corrections to be actioned prior to final payroll processing
- Once the timesheet entry process is finalised, an administrator can automate the release of the hours worked and allowances payable into the Pay Input form for completion of payroll processing, along with any other input for the employees

Benefits

- Improved payroll accuracy is achieved by automating the rule calculations and eliminating risk of human error
- Time savings with no need for the pay office to manually calculate the hours worked and allowances payable
- Reduced payroll data entry effort and bottlenecks with data captured and verified as close to source as possible by the employee and/or their manager
- Improved data integrity. As a single, integrated end-to-end solution, employee contract details, leave balances, cost allocations etc are automatically available
- Duplicate data entry is eliminated
- Reduces paper and associated cost - no need to produce hard copy timesheets
- Reduces the payroll administration processing window with the calculation and update of payroll automated

4.4 Payroll

Pay Input - Kelly (Judy)

Employee - Start Date: 01/01/2003

6 - Kelly (Judy) Retail assistant (Retail Assistnt) Code Name

Pay Date: 01/12/2004* Payslip: 1 Number of Pays: 0 Whole Weeks Sick: 0

Current pay slip locked Allow Advanced Leave

Status	Trans. Code	Description	Variable	Value	Amount	Type	Regn	Brch	Dept	CostCtr
🔒	1	Ordinary	HOURS	40.0000	461.54	TxAll	4	4	102	10012
🔒	2	Time 1.5	HOURS	3.0000	51.92	TxAll	4	4	102	10012
🔒	200	Uniform	SPECAMT	40.00	40.00	TxAll	4	4	102	10012
🔒	202	Service	SPECAMT	12.00	12.00	TxAll	4	4	102	10012
🔒	503	SocialClub	SPECAMT	6.00	6.00	TxDn	4	4	102	10012
🔒	9991	State Tax			29.69	Int	4	4	102	10012
🔒	9998	Tax			107.00	TxDn	4	4	102	10012
🔒	9999	NETT PAY			452.46	Int	4	4	102	10012

Default Costing: Auckland (4), Auckland (4), Finance and Administration (102), Legal (10012)

Standard Days per Week: 5.000

Disbursement Type: Standard Rounding: Standard Hours per Period: 40.00

Union: Award: Step:

Save Close

Functionality Summary

- Caters for weekly, fortnightly, bimonthly, monthly and quarterly pays
- All data validated at time of input. Invalid entries highlighted for immediate correction
- An extremely flexible single entry payment screen is used to record employee payment and deduction transactions
- Data can be overridden, added, subtracted, amended and deleted
- Multiple pays can be entered as separate payslip numbers
- User defined formulas ensure complex calculations are easily handled
- Transaction formulas, contract/award tables are all date stamped. Rates and formulas can be entered in advance with an effective date, and it is only when the date is reached that the new rates are applied e.g. birthday, service dependent allowances
- User defined limits and warning messages can be held against each transaction and reports produced for checking prior to final pay, report and payslip printing
- Comprehensive costing features enable an employee's pay to be apportioned or split across multiple cost centres (no maximum) on either a percentage or actual hours worked basis
- Default costing can be established and overridden if required, or if variable, entered each pay
- Full audit trails are available

Benefits

- Improved payroll accuracy with the flexibility to run the payroll as often as required and a range of reports available for checking prior to final reports and payslips being produced
- Time savings with special, termination and manual pays calculated online



- Online pay calculations substantially reduce processing bottlenecks to meet pay day deadlines
- Access to up-to-date information
- Reporting and inquiry flexibility and ease of calculating backpays with online access to employee transaction and costing history
- All NZ and Australian legislative reporting requirements are met
- Data entry significantly reduced with company and employee defaults

4.5 Leave Management

Employee Leave - Wilson (Michael)

Employee - Start Date: 15/06/1989 - TR037566

50010 - Wilson (Michael) Branch Manager (BRMGR)

Code Name

Irregular Hours Rolling Average Leave Requests Comments Customised Fields

Summary Leave Setup History Standard Rate History Leave Liab Adjustments

As At Date: 29/01/2005 Standard Minimum Rate: 16.5500 Basic Rate: 16.5500

Display Units: Days Rolling Average Rate: 0.0000 Excess: 105.12

Code	Description	Irr Hours	Arrears Liability	Accrual Liability	Entitlement Weeks	Arrears	Advance Taken	Accrual	Booked	Due
A	ANNUAL LEAVE	No	16520.07	72.72	4.0000	123.98	0.00	12.55	0.00	136.53
B	BEREAVEMENT LVE	No	-124.13	0.00	0.0000				0.00	-1.00
C	ACC (WORK)	No	-198.60	0.00	0.0000				0.00	-1.50
I	IN LIEU DAYS	No	132.40	0.00	0.0000				0.00	1.00
J	JURY SERV. LVE	No	-744.75	0.00	0.0000				0.00	-5.63
L	LONG SERV. LVE	No	3847.88	0.00	3.0000				0.00	30.00
Q	SPECIAL LVE	No	372.38	0.00	0.0000				0.00	3.00
S	SICK LVE	No	12238.73	0.00	1.0000				0.00	92.43

Current Year Accruals and Adjustments

Date	Hours/Day	Days/Week	Entitlement	Override	Current Days	Current Hours
15/06/2004	8.00000	5.000	4.0000	No		
29/01/2005	8.00000	5.000	4.0000	No	12.54795	100.38360

Save Close

Functionality Summary

- All leave to be monitored is user defined and includes:
 - Accrued leave e.g. annual leave
 - Lump sum leave e.g. long service, shift, statutory days, in lieu, sick etc
 - Non-accrued leave such as maternity/paternity, jury service, bereavement and leave without pay etc
- Annual leave can be calculated based on an alternative date to the employee anniversary date
- A number of options are available for the calculation and payment of annual leave
- Leave liabilities for employees who work variable hours, days and weeks per year can be calculated based on the actual hours worked, the number of days these hours relate to and the actual number of weeks worked
- Leave types can be grouped and prioritised for payment in a specified order automatically e.g. lieu days followed by annual leave
- Online access to employee entitlements and leave taken histories is recorded



- Leave entitlements based on the achievement of breakpoints can be automated e.g. an employee's annual leave entitlement may increase from 4 weeks per annum to 5 weeks per annum after 5 years service; long service leave entitlements after ten years of service

Benefits

- Reduced administration with many automated leave features
- Comprehensive reporting assists with the management and tracking of leave
- Facilitates completion of budgets with the ability to forward project leave liabilities

4.6 Health and Safety

Incident Details

Incident: CHEMICALS - Ammonia Bromide Acetate

Code: [] Name: []

Required Actions | Costs | Linked Items | Comments | Documents | Customised Fields

General | Reporting/Factors | Injured Persons | Damaged Property | Witnesses | Investigation | Cause Analysis

Id: CHEMICALS Incident Date: 27/05/2005 Time: 08:45

Name: Ammonia Bromide Acetate Reported

Description: New consignment being unpacked; dropped canister which split and contents began leaking. Highly acidic and rapid gaseous reaction when exposed to air.

Location: Christchurch Exact Location: Chemical storehouse

Immediate Action: Evacuated personnel, sealed storehouse, called fire brigade

Incident Manager: Bush (Bill) (Emp)

Work Related: Investigation Required?:

Created on 12 February 2007, 18:18:59

Add Incident. | Delete | Save | Close

Functionality Summary

- Accident and incident details to meet OSH Service requirements, including property damage and a comprehensive incident statement for both work and non-work related events. Able to record incidents for both employees and non-employees
- Record details of who investigated the incident, cause analysis statement and codified immediate and basic causes
- Photographic record of incident can be held on file and accessed from the incident record
- Multiple corrective actions can be recorded for an incident with the person responsible, target/completion dates and priority settings recorded. Email reminders can be set
- Able to record employee costs, property damage costs and user defined costs for each incident
- Employee rehabilitation plans can also be recorded

- Gross taxable earnings for the 4 weeks prior to the accident date and for the 12 months prior to the accident date can be displayed and facilitate the completion of forms e.g. Accident Compensation Corporation
- Comprehensive Hazards Register allows for the recording of hazard details including potential harm, control mechanism, person responsible, review date and outcome and affected positions
- Plant and equipment preventative maintenance checks, faulty components and planned repair dates can be recorded and scheduled. Email reminders can be set
- Recording of safety and environmental audits including audit focus, auditors, observations made and remedial actions required. Email reminders can be set for remedial actions
- Accident and incident register and OSH Service notification reporting is available. Comprehensive analysis reporting to suit users own requirements is available through the Report Writer e.g. costing, body part and injury types by location
- External Contacts module allows for the recording of third party persons and/or organisations involved in incidents
- Users can record links to related documentation and Intranet/Internet addresses
- Employees can record Incidents and Hazards via Self Service
- Drug and alcohol testing, results and rehabilitation management

Benefits

- Provides a tool to proactively manage Health and Safety issues
- Enables the true cost of an accident to be monitored
- Keeps all relevant data within the one database

4.7 Contract Management

Functionality Summary

- Assists with the management of collective and individual employment agreements by:
 - Enabling proposed changes (e.g. straight percentage increase, increase per transaction, a new value per transaction or a combination of all three) to be modelled as a “What if” scenario” during contract negotiations
 - Salary bands can be established and linked to positions
 - Automating the interface to payroll to update actual changes if calculated offline
 - Controlling pay changes entered in advance of their effective date through date-stamped formulas
 - Enabling contract changes to be entered at individual employee, contract, cost structure (may represent a branch, location, division of the organisation) levels across multiple payroll files
- Options are available to extract data for further analysis utilising PC based reporting tools



Benefits

- Ease of determining the true cost of contract changes
- Time savings during the negotiation phase
- Reduces change implementation administrative tasks
- Improved accuracy and consistency with bulk changes across several files implemented at the highest possible level

4.8 Employee Profile

Employee Details - Jones (Neville)

Employee - Start Date: 01/01/2000 - 13345

1 - Jones (Neville) Retail manager (Retail Mgr)

Emp History | Comments | Documents | Customised Fields | Organisation Links

Personal | IDs | Contact Details | Family | External Contacts | Health & Disability

Name Details

Title: Mr Initials: N J

Family Name: Jones

Given name: Neville

Middle Name(s): Jason

Preferred Name: Neville

Previous Name:

Additional Personal Details

Birth Date: 04/03/1954 Age: 55

Gender: Male

Marital Status: Married

Nationality: New Zealand

Citizenship:

Ethnicity: NZ European

Iwi:

Preferred Contact Details

Street: 26 Greer Cres

Suburb: Tawa

City: Wellington

Country: New Zealand

Post Code:

Telephone: (04) 801 1234 ext 123

Cell Phone: (027) 554 5698

Fax:

Email: MurryJ@greenthumb.com

More contact details available on the contact details sheet

Save Close

Functionality Summary

- Complete employee profile information including:
 - General employee details - preferred name, address, home, business and mobile phones
 - Employee contact/relationship details e.g. next of kin, emergency contact, family etc
 - Recording of optional data, for example ethnicity, birth date, and nationality
 - Provides a link to related employee electronic documentation stored on the client LAN/WAN and Intranet
 - Employee photographs can be stored and accessed from their personal information screen
 - Record the employee/position relationship (held in the position management module). An employee can occupy multiple positions with each occupancy recording different remuneration, issued items etc
 - Management of issued items by highlighting on termination employees with outstanding issued items for action prior to the final pay being calculated

- Employees can be linked to a company vehicle. Vehicle details assist with the management of warrant of fitness and registration renewals
 - Employee qualification details including major disciplines and date of attainment
 - Employee skills and competencies including dates and proficiency levels
 - Skill and qualification profiles are linked to the Position Management, Training, Applicant Tracking and Payroll functions to identify gaps and training requirements
 - Query and match employee skill and qualifications against position requirements
 - Employee study units to qualify vs. the number of units completed and the outcome
 - Employee tax, superannuation, banking, salary, benefits, allowance and deduction details
 - Rewards and recognition recording
 - Conflict register to record gifts and interests which may be in seen as a conflict based on employment terms and conditions
 - Free format comment screens and user-defined tables to record client specific data
 - Diarise key dates for for subsequent follow-up and review
 - Equal Employment Opportunity / workforce planning reporting
- Privacy Act reporting requirements met

Benefits

- Peace of mind knowing Privacy legislation is complied with
- Ease of providing management with timely and up-to-date information to support the decision process

4.9 Position Management

The screenshot shows a 'Position Details' window with the following data:

Remuneration		Job Sizing		Linked Items		Roles	
Issued Items	Potential Candidates	Comments	Documents	Customised Fields	Position	Establishment	Training
Skills, Quals	Benefits	Position Details					
Short Name: Accounts Assist		Inactive <input type="checkbox"/>					
Name: Accounts Assistant							
Effective Date: 01/01/2000	Expiry Date:	Review Date:					
Position Type:	Union:	Hours: 40.00					
Emp Type: Full Time	Award:	Standard: 40.00					
Status: Permanent	Grade/Step:	Full Time: 4					
Contract: Employee Collective Agreement	Actual FTE: 2.75	Incumbents: 4					
ACC Levy:	Budget FTE: 5.00	Budget Salary: 35000.00					
Level: Head Office	Org Level: 0	Total Budget: 175000.00					
Function:	Mgr of Staff: <input type="checkbox"/>						
Job Family:							
Authorised By Position: General manager (General Manager)							

Functionality Summary

- The multi-company structure of Jade Star enables organisation standards to be enforced whilst providing an extremely flexible reporting structure
- Record generic position information, for example skills, qualifications, benefits, allowance and deduction information
- Record the budgeted FTE per position, comparing to the actual FTE and number of incumbents
- Flexible position reporting-to structures enable organisational charts to be easily generated
- Employee skills and qualifications can be compared with position requirements to identify gaps and associated training requirements
- For each position a budgeted salary can be recorded and compared to the actual salary paid to highlight any variances
- Online position inquiry for current and historic position structures is supported and displays the incumbent's photograph and selected personal details if required
- Provides links to position related electronic documentation e.g. Position Description document, job advertisement etc stored on the client's LAN/WAN/Intranet/Internet
- Turnover analysis reporting and headcount reports are easily generated

Benefits

- Time savings generating organisation charts
- Improve productivity with position/employee gap and competency analysis reporting
- Improved control of staff versus budget costs
- Highlights potential problem areas e.g. high staff turnover in a particular area

4.10 Remuneration Management

Salary - Palsey (Katherine)

Employee - Start Date: 15/06/1989

50010 - Palsey (Katherine) MANAGER (MANGR)

Code Name

Rate Number	0	*									
Action Date	Effective Date	Pay Basis	Contr.	Agmt	Grade Step	Hourly Rate	Period Rate	Annual Salary	Reason	Adjust B/Pay	Ex.Spe Runs
24/07/1994	24/07/1994	Job Eval.	4	4	3	9.9488	373.08	19400.00			
05/06/1994	05/06/1994	Job Eval.	4	4	3	9.9488	373.08	19400.00		Yes	
01/06/1994	03/04/1994	Union	4	4	3	21.3240	799.65	41581.80			
16/05/1994	16/05/1994	Annual	0			27.1795	1019.23	53000.00			
01/05/1994	01/05/1994	Annual	0			25.6411	961.54	50000.00			
03/04/1994	03/04/1994	Union	4	4	3	21.3240	799.65	41581.80			
01/08/1993	01/08/1993	Union	4	4	4	22.7890	854.59	44438.68			
16/05/1993	16/05/1993	Hourly	0			27.5692	1033.85	53760.20		Yes	
02/05/1993	02/05/1993	Hourly	0			25.0000	937.50	48750.00			
01/07/1992	08/06/1992	Hourly	0			25.0000	937.50	48750.00			
15/06/1992	15/06/1992	Annual	0			24.9717	927.89	48500.00			

Contract: 4 - MECHANICS
 Agreement: 4 - MECHANICS
 Grade/Step: 3 - MECHANIC 2 YRS SERV
 Hours per period: 37.50
 Pay frequency: Weekly

Close



Functionality Summary

- Employee salary and salary histories are recorded, together with user-defined benefits
- Benefit values coupled with salary details are combined to provide a total package value automatically
- Total package can be recorded along with benefit values to create the cashed up amount for payment
- Salary adjustments can be automated by applying a percentage or dollar value to selected ranges of employees, contracts etc
- Salary review processes are supported by the facility to generate “What if?” scenarios. Another option is to extract data for manipulation by a variety of PC reporting tools for subsequent upload
- Job evaluation criteria (high, low and mid-point values), links to salary bands and key performance indicators are accommodated
- Integration of salary, employee profile and payroll modules to cater for skills based pay

Benefits

- Better organisation and control of salaries and benefits with the facility to identify the true cost of a salary package
- Increased responsiveness during the negotiation process
- Reduced administration workloads and timeframes with the implementation of salary adjustments

4.11 Recruitment

The screenshot displays the 'Vacancy Details' window with the following information:

- Vacancy:** 10 - Lawyer
- Name:** Lawyer (Lawyer)
- Code/Name:** Code (selected)
- Navigation:** Back, Forward, Home, Refresh, Print (PD)
- Tabbed Interface:** Comments, Documents, Customised Fields, Job Description, Other Details
- Sub-Tabs:** Vacancy, Applicants, Recruitment, Skills & Qualifications, eRecruitment, Job Advertisement
- Reference:** 10
- Name:** Lawyer
- Position:** Lawyer : Lawyer (Lawyer) (4/27/111/10012)
- Date Created:** 11/03/2003
- Applications Open:** 01/01/2005
- Vacancy Status:** Advertising
- Applications Close:** [Empty]
- No. of Places:** 1
- Appointment Closed:** [Empty]
- Recruitment Officer:** [Empty]
- Reopened:** [Empty]
- Advertised:** Internally Externally
- Reports To:** External Person: Jones (Neville)
- Authorised By:** External Person: [Empty] Position: [Empty]
- Vacancy Costing Information:**
 - Region: Auckland (4)
 - Business Unit: Head Office (27)
 - Profit Centre: Head Office (111)
 - Cost Centre: Legal (10012)
- Vacancy Data Retention:**
 - Remove Applications: 0 (Days after)
 - Remove Vacancy: 0 (vacancy closes)
- Buttons:** Add Vacancy (+), Delete (X), Save (✓), Close (X)



Functionality Summary

- On termination or promotion of an employee, the employee/position link is broken highlighting the vacant position together with the position attributes
- Qualification and skill criteria, including proficiency levels, are held for each position
- Internal and external candidate profiles (including pre-employment, medical, applicant testing results) are recorded
- If an internal candidate applies, the applicant details are automatically populated from employee profile
- Applicant skills and qualifications can be compared to position requirements and based on a user defined percentage fit and a shortlist of the most appropriate candidates selected
- All dates relating to the application are held on file i.e. date of application, interview, letter of appointment or rejection. Applicant history relating to recruitment status changes is automatically recorded
- Interfacing applicant details with word processing packages facilitates the acknowledgement of applications and the management of appointment/unsuccessful letters
- Once the successful applicant is appointed to the position, their details are automatically transferred as part of the employee setup process. The vacancy is then automatically closed
- If required, unsuccessful applicant details can be retained on file for future reference
- Applicants for a vacancy can be deleted automatically at the end of a user defined retention period
- The method, source and cost of recruitment at vacancy/applicant/employee level can be recorded
- Links to electronic documentation are held at vacancy and applicant levels e.g. position descriptions, resumes, reference letters

- Option to utilise Self Service for e-recruitment i.e. connectivity to the client's Internet site to allow applicants to submit an application in response to advertised vacancies:
 - User defined application questionnaires tailored for the role can be established
 - Data, such as the application questionnaire response and attached CV, can be passed directly to the system to avoid any extra keying
 - Acknowledgement of applications is automated.

Benefits

- Administrative time savings e.g. letters, identification of most appropriate candidates, automatic transfer of applicant details to the payroll and human resource modules
- Assists with the identification of the most cost-effective recruitment channels
- Option to record details of unsolicited applicants if required for later consideration

4.12 Training and Development

Training Summary

Programs

Code	Description
Gardening	Plan, Plant, Maintain
INDUCTIONNEW	Induction Program
Tractor	Tractor Maintenance

Occurrences From To Show All

Course	Reference	Provider	Start Date	# Attendees
GardenMaint			12/08/2003	4

Courses Show All

Code	Description
GardenMaint	Ongoing Garden Maintenance
GardenPlan	Garden Planning
GardenPlant	How and when to plant garden

Attendees

Name	Occurrence	Reason	Status	Last Update	Priority	Cost
Bellamere (D.)	12/08/2003 09		Comple			0.00
Bones (Jim) [E.]	12/08/2003 09		Comple			0.00
Jones (Neville)	12/08/2003 09		Comple			0.00
Larson (Mark)	12/08/2003 09		Comple			0.00

Close

Functionality Summary

- Employee training needs can be identified by matching employee skills and qualifications against the position requirements
- Training needs highlighted as part of the performance review process can be used to help identify employee training plan requirements
- Compulsory and optional training courses can be held against each position with Health and Safety related courses separately identified for management by the OSH department
- Employees who have not attended or are not scheduled to attend required courses are automatically highlighted



- The Training Summary form provides a summary of the organisation's training setup and allows users to drill down to the maintenance, setup and booking forms
- Program and course details such as category/type of course, pre-requisites, duration, organiser, location min/max attendees and budgeted cost per person provide a base. These attributes can be set as program/course defaults and varied at the occurrence level. Skills, including aptitude and proficiency levels, and qualifications attained through training can also be recorded
- Upon successful completion of a training program, the employee's skill and qualification profile is automatically updated
- Resources can be booked for course occurrences. Actual employee and resource costs can be recorded as well as provider and attendee feedback. Recording of anonymous feedback is catered for
- Able to record course attendance by contractors and other non-employees
- Full training histories are retained
- Ability to add/create waiting lists of prospective attendees against courses for which there are no occurrences scheduled
- Booking requests and feedback on courses can be entered via Self Service

Benefits

- Maximises training budgets and assists with course cost control
- Easy identification of training gaps and employee training development directions to improve staff productivity
- Reduced administration - course scheduling and management, employee masterfile updates
- Improved data integrity with training, employee profile and organisation module integration

4.13 Performance Management

The screenshot displays the 'Employee Performance Plan Maintenance' application. The main window shows the following details:

- Employee:** 52 - Chin (Maryann)
- Plan Period:** 01/07/2005 to 30/06/2006
- Summary Form:**
 - Performance Plan Period: 01/07/2005 to 30/06/2006
 - Plan Status: In Progress (dropdown)
 - Completion Date: (empty field)
 - Follow Up Required: (checkbox)
 - Preliminary Rating: (dropdown)
 - Signed By Mgr: (empty field)
 - Signed By Emp: (empty field)
 - Final Rating: (dropdown)
 - Completed By Manager: (checkbox)
 - Comments: Three text areas for Employee, Manager, and HR.
- Left-Hand Tree View:**
 - Summary
 - Objectives
 - Improve my understanding of plants
 - Make better flower arrangements quicker.
 - To create new Objectives
 - Competencies
 - Key Performance Categories
 - Milestones
 - Set Objectives
 - Mid year performance review
 - Improve my understanding of plants
 - Make better flower arrangements quicker.
 - To create new Objectives
 - 6 Month Review
 - Objectives
 - Behaviour
 - End of Year Review
 - Improve my understanding of plants
 - Make better flower arrangements quicker.
 - To create new Objectives
 - End of Year Review
 - Objectives
 - Behaviour
 - Overall Review
 - Reviews (Not related to a Milestone)
 - Training Courses Requested
 - How and when to plant garden
 - Garden Planning
 - Training Courses Required
 - Ongoing Garden Maintenance
 - Garden Planning
 - Career Goals
 - Business Unit Goals
 - Development Requests
 - Training on pruning of Roses
 - Comments
 - Documents
 - Customised Fields

Functionality Summary

- Employee performance review results can be recorded against defined attributes and skills. Weighted ratings are automatically calculated
- Allows for the recording of employees' objectives, competencies and career goals
- Interfaces with Position Management and Training modules to highlight training needs and create a training plan
- Self Service module is used to allow Manager and employee to access each stage of the Performance Review and agree on sign off of the Review
- Comprehensive management reporting includes:
 - An analysis of each review and the collective results for a selected period
 - Highlighting employees who have not been reviewed as at a specified date
 - Full histories of previous performance evaluations

Benefits

- Assists with planning to optimise staff performance
- Formal identification of required competencies and areas of improvement easily tracked

4.14 Career Planning

Functionality Summary

- Facility to establish an employee's career path, proposed next placement and ultimate placement including target dates
- Records employee strengths and weakness including areas of development to help identify employee training requirements
- Employee mobility indicators indicating employee availability for transfer and location preferences, assist with the identification of appropriately skilled personnel for relocation
- Succession planning for key positions enables possible successors and their training needs to be identified for future planning

Benefits

- Enables plans for the departure (expected and unexpected) of key personnel
- Assists with the management of employee career development and associated training plans



4.15 Self Service

Functionality Summary

- Internet access for employees to their own personal information, with the ability to selectively update data e.g. address changes
- Automation of various HR business processes and approvals using workflows
- Functionality summary includes:
 - View news and alerts
 - Leave balances and history by leave type
 - Payslip details for current and previous pay periods
 - Net pay disbursement
 - Position and cost structure
 - Vacancies
 - Skill and qualification searches
 - Lodgement of Health and Safety incidents/accidents
 - Staff directory information
 - Organisation charting
 - Time recording including timesheet submission for approval

- Overtime requests for approval
- Request to work on a public holiday for approval
- Expense and mileage claims for approval
- Conflict of Interest recording
- Termination and new hire workflows
- Remuneration review recommendations and approval
- Performance reviews
- Training history, feedback on training and scheduled training courses
- Ability to allocate a temporary manager during manager absence
- Request approval to create a new position
- Management access to staff records as above including salary details etc
- An optional e-recruitment function allows applicants to submit an application (via the clients' website) in response to advertised vacancies. Data, such as the application and CV, can be passed directly to the recruitment application to avoid any extra keying

Benefits

- Reduce payslip stationery costs and associated disbursement costs
- Free pay office staff from day to day queries
- Reduce pay and HR staff data entry effort and reduce the risk of input errors

4.16 Standard Reporting

Functionality Summary

- 350+ standard reports available
- Runtime parameters
- Print, PDF, email and/or CSV and TXT file extract options
- From-to date range option
- Cyclical reports can be established as a group & automatically run at a predetermined time each week, fortnight, month

Benefits

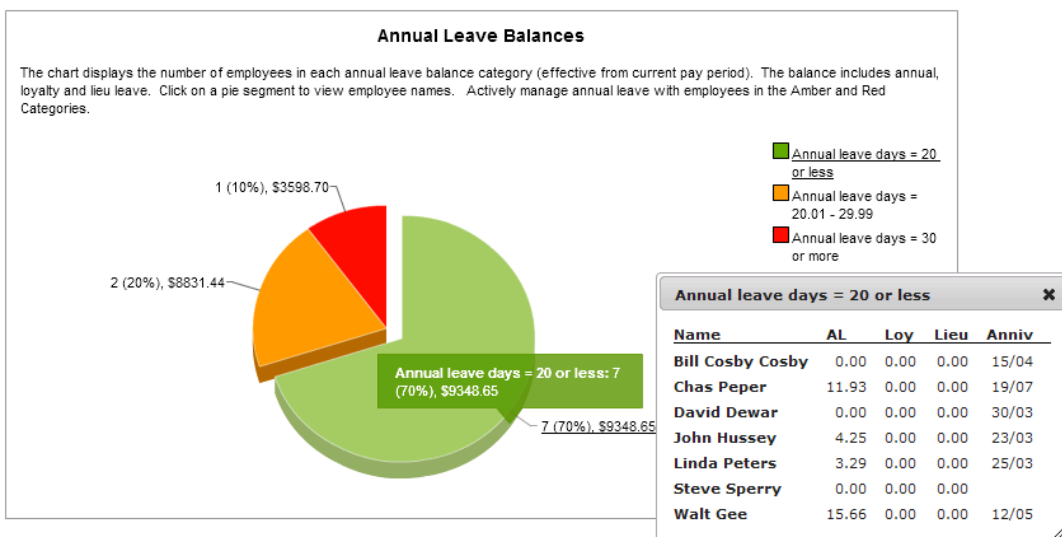
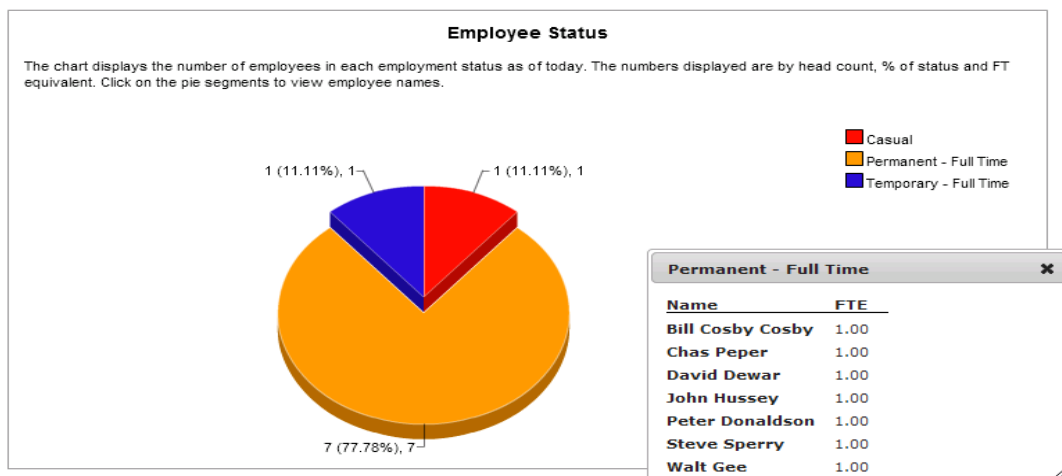
- With the number of reports and the parameters most requirements are covered without the need to design/build another report
- The parameters provide the user with choice and flexibility
- Files can be downloaded easily into spreadsheets for forecasting and modelling
- From-to date range allows reports to overlap the tax year to meet financial year end reporting needs



4.17 Manager Dashboard

Functionality Summary

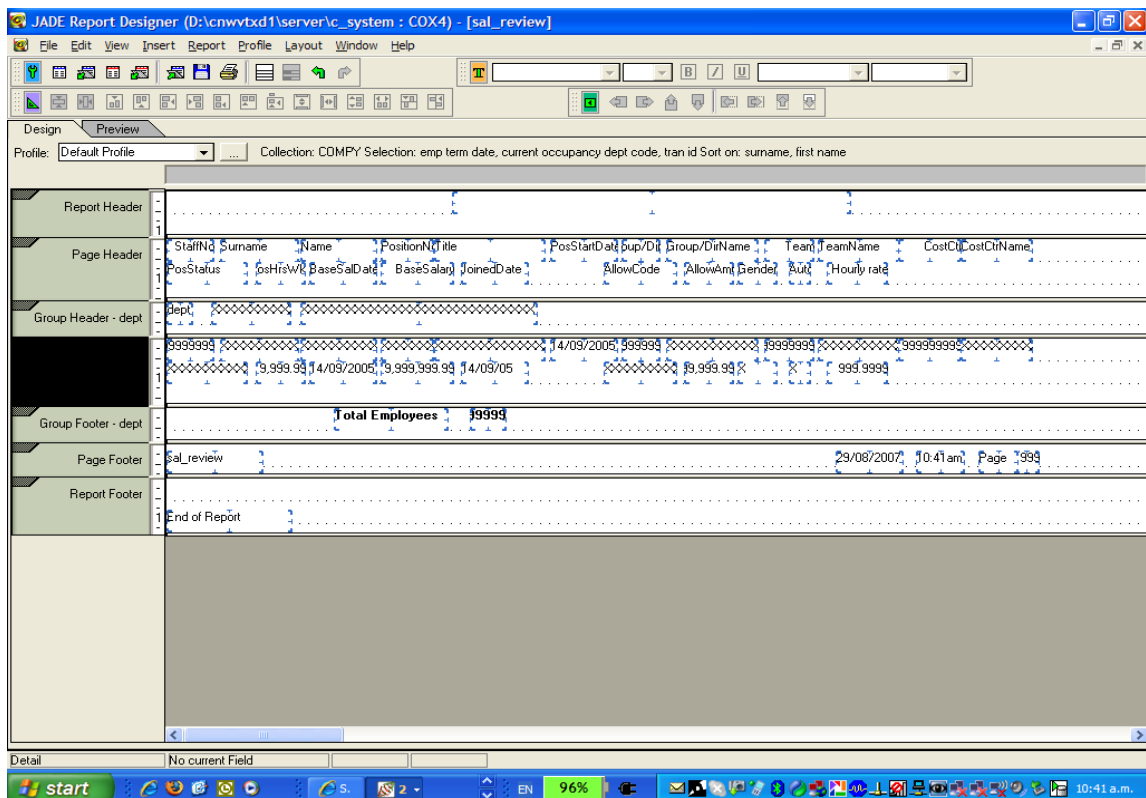
- Provides management with a secure, up-to-date, graphical view of key employee information and includes:
 - A selection of charts and graphs through the Dashboard library which can be configured to display (or not)
 - Manager interrogation of graphs and charts by simply hovering and clicking their mouse over the chart or graph, which displays more information in a pop-up window
 - Dashboard security is driven from Jade Star and is easily configured to suit user permission and confidentiality profiles
 - Managers only see data relating to their direct reports, unless they have chosen to view both direct and indirect reports (subject to security). They also have the ability to drill down to their reporting manager's view
 - Customised graphs and charts can be developed to meet specific client needs



Benefits

- Fast easy access to meaningful data in a graphical format
- Empower line managers with the information they need to make more informed decisions
- Helps aligns operational decision-making with strategic goals

4.18 Report Writer



Functionality Summary

- The ability to create profiles appropriate to your reporting/extract requirements
- Security linked to JADE STAR application security
- Sort criteria
- Runtime parameters
- Conditional statements
- Create virtual fields
- Specify report headers and footers as well as group headers and footers
- Perform arithmetic calculations
- Create totals / subtotals
- View reports on screen
- Print layout options, field sizing, font size, colour
- Create an extract as a CSV, HTML file



- Store report specifications for re-use
- Export / import of report specification

Benefits

- As an integral part of the underlying technology there are no integration issues
- The structure of the data makes it easier and faster to generate one-off reports based on criteria or sequences that have not been predefined
- Users do not have to be programmers to design reports

4.19 Security

Functionality Summary

- Supports 168 bit SSL encryption on the network between the thin client and the application
- Within the application, various levels of security are provided. User code access can be:
 - Restricted to specified companies and within those companies specified screens and reports. Access templates can be established to facilitate set up
 - Linked to the cost structure ensuring access to a selected group/s of employees only
 - Associated with specified PCs and printer for access and reporting
 - Restricted to performing specific functions only e.g. inquiry of maintenance
 - Log off. The application can be set to terminate automatically after a predetermined period of inactivity (user defined)
 - Full audit trails detail who made what change from what terminal and at what time. The old and new values are also reported including the audit report sequence number
- Non display passwords are used in combination with user codes to restrict access at log on
- Passwords can be changed at will by the user or alerted for change when a maximum number of day's validity is reached
- Password access, with violations terminating access, is logged

Benefits

Peace of mind knowing access to secure information is restricted to authorised personnel

