Personnel Information – 2.1 New Hire
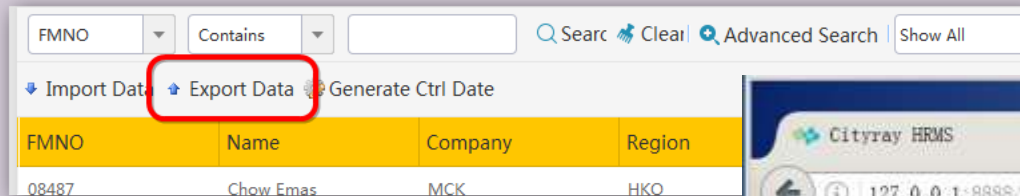

◉ **Input New Hire Information Process**

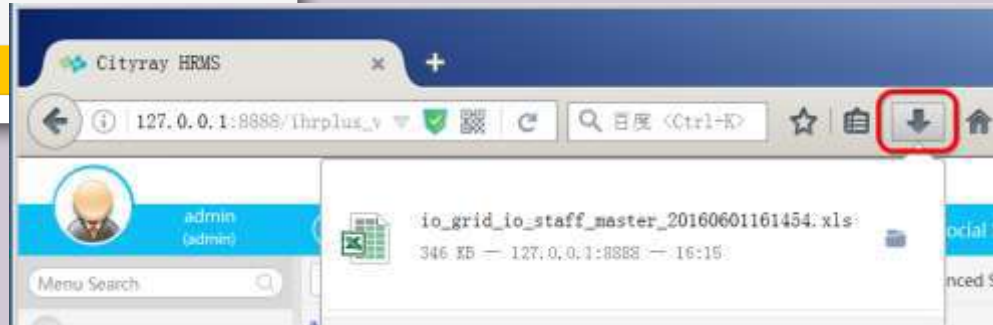Batch Input by excel file with fixed format

1) Export excel format from system

- Click "Export Data"

- Download and open the exported excel.

(The format needs to be exported from system only at the first time. The data can be edited directly in the excel and imported into system since then.)

Personnel Information – 2.1 New Hire

Line1&2 must be retain

Line1	B	C	D	E	F	G	H	I	J
FMNO	Name	Group	Tax Office	Department	GOC	Position	Job Name	PCAT	Location
employee_no	employee_name	company	region	sub_company	division	position_code	position_name	category	working_l
Line2 08487	Chow Emas	MCK	HKO	HKE	Others	31002	Senior Implementation Facilitator	CSSA	HKO

2) Input new hire information under excel format.

- Line1 – Field names defined by McKinsey ePeople

- Line2 – Corresponding field names defined by Cityray (no use here but do not delete)

- Line3 – An example

- When filling in information , please delete line3

Note:

- Only new hires' information can be imported in this function. Once done, you can't change anything through this function.

- Some fields are mandatory.

- Save the excel as template. When importing new hire's information, use this template.

- Line1&2 cannot be deleted or changed.

Personnel Information 2.1 – New Hire

3) Click 〝Import Data〞

Select the "File Path", tick "Has Header", then click "Import".

4) If it's successfully imported

A pop-up window will show success message.

5) If it fails

Click "File Name" path. A file with all wrong data can be opened. Modify the data and import again.

Note: The imported data can be queried in the following process- Employee Master.

Personnel Information – 2.2 Employee Master

- **Personnel Information –** Query active employee

- ****Personnel Information Batch Import** – Batch import to edit active employee's information by excel.

(Previous information will be overwritten without history record)

(Now cease this function temporarily)

- **Employee Contract –** Signed contract records

- **Generate Headcount* -** Calculate headcount monthly

Personnel Information – 2.2.1 Employee Master

- **Query about active employee**

① Choose organization. Employee records under this unit will show.

② Set "Filter Condition" to quick search employee

③ Choose one record and click "Edit Employee" to check detail information

Personnel Information – 2.2.1 Employee Master

- **Company**

- Underlined Fields: Information can be updated directly. (See Left Pic)

- Double click underlined fields, and then input new value. Change effective date and code, then click "Save".

- Once a new value is saved in underlined fields, whether it will overwrite the old records, it depends on the effective date.

 This sign means you can choose from drop down menu.

 For the date field, you can choose from drop down menu or input information using the format "YYYY-MM-DD" or "YYYY/MM/DD"

Personnel Information – 2.2.1 Employee Master

- ⊙ **Personal**

Personnel Information – 2.2.1 Employee Master

◉ **Payroll- Special Pay Period**

① **Click "Payroll" and then**

② **Click "Special Pay Period"**

③ **Click "Add" and then a window will pop up**

④ **Select types of "Special Pay Period"**

⑤ **Input related Information and then click "Save"**

Personnel Information – 2.2.3 Employee Contract

- **Employee Contract**

Personnel Information – 2.2.4 Generate Headcount*

- **Headcount report can be generated.**

- **The report is based on the data on the date when closing current month payroll and posting to the next month**

Personnel Information – 2.2.4 Generate Headcount*

- Example

Area	Company	Department	last_month_HC	Joiner	Leaver	Move	current_month_HC	Different	percentage
		Sub Total	135	0	0	0	135	0	0.00%
	SHA Office	Supporting	266				266		
		Marketing	68				68		
		Admin	5				5		
Great China		Sub Total	339	0	0	0	339	0	0.00%
	HKO Office	Admin	66				66		
		Finance	133				133		
		Marketing	152				152		
		Sales	156				156		
		Supporting	200				200		
		Sub Total	707	0	0	0	707	0	0.00%
Sub Total			1181	0	0	0	1181	0	0.00%

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AQUA_P05_HeadcountReport(P05)   **Example**

count_date:2016/08/01
print_date:2016/06/08
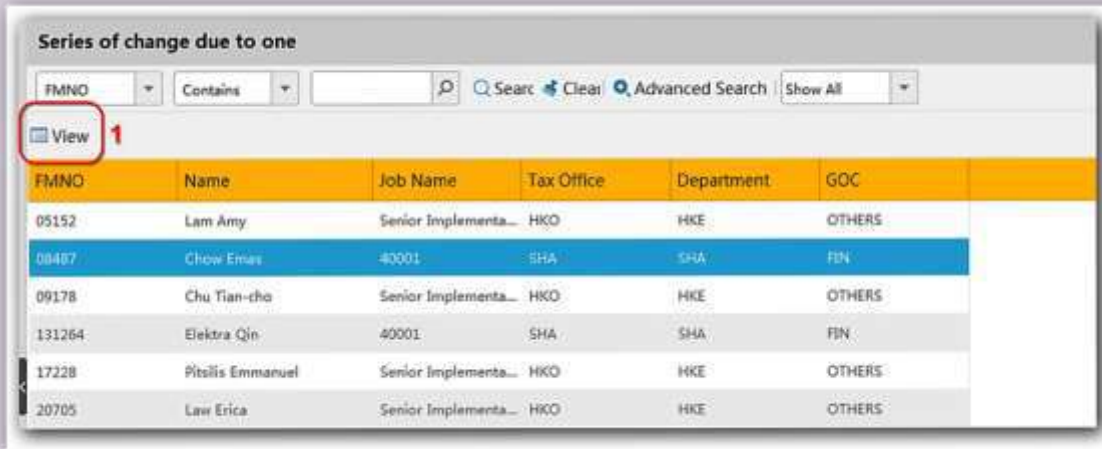
Personnel Information – 2.3 Change Status

Menu Search

- Personnel Flow
- New Hire
- Employee Master
- Change Status
  - Series of Change due to On
  - Single Change
  - One Field Batch Replaceme
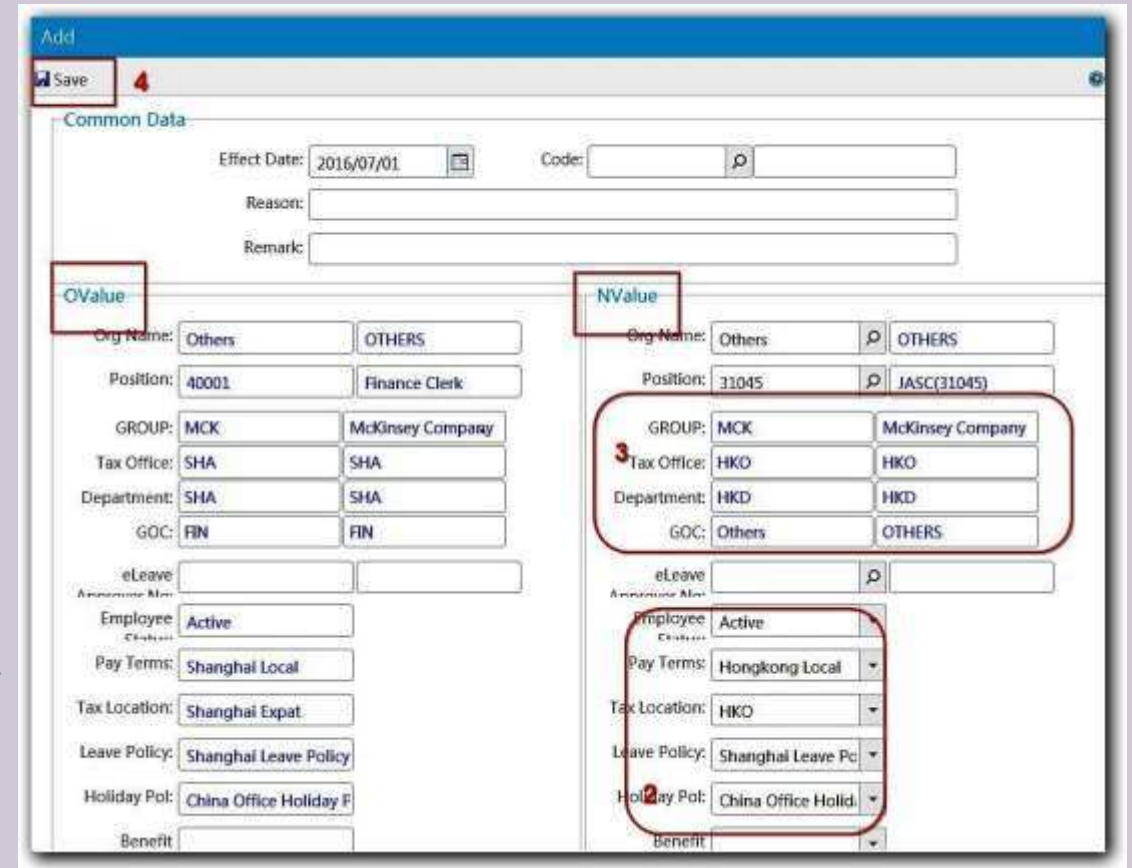- Employee Termination
- Employee Rehire

- ◉ **Series of Change due to One Change**

- ◉ **Single Change**

- ◉ **One Field Batch Replacement**

Personnel Information – 2.3.1 Series of Change due to One Change

- **2.3.1 Series of Change due to One Change**

① Select one employee then and then click "View"

② The "Ovalue" has the same information as that in "Nvalue". When changing value in "Nvalue", you only need to change the fields you want to change, leaving other fields unchanged。

③ Some fields can't be changed. But when you change a special field, series of changes will happen.

④ Save data

Personnel Information-2.3.1 Series of Change due to One

**Example – Organization Change due to transfer

① Change code: choose type of change

② Change Org Name and Position in "Nvalue"

③ Auto change: these series of change will automatically happen after step2.

④ Save