

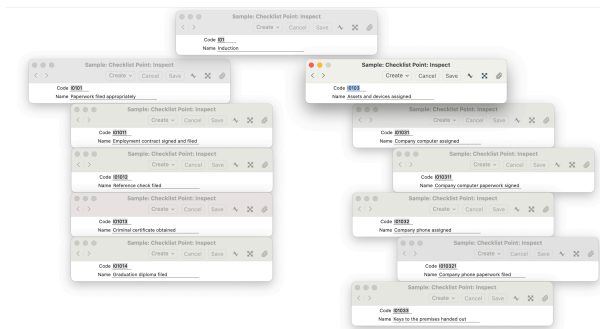
## Introduction

Standard ERP by HansaWorld allows you to create checklists of certain human resource related events, including employee induction, job changes and employee terminations.

## Setup

Go to the module Human Resources Management > Settings. In there you will find the setting > Checklist points.

This setting is very simple but can be used in powerful ways, if you set up hierarchies of checklist points.



As you can see the first point of the Induction checklist I01 has - in this example - two sub-points: I0101 - Paperwork and I0102 - Assets and devices assigned. Each of these sub-points can have sub-points again. For example, the list of documents and paper which needs to be completed for each employee. As for an example with assets, not only were sub-points set up for each asset - including computers, phones, and keys to the premises, but for each asset we can arrange sub-points as well.

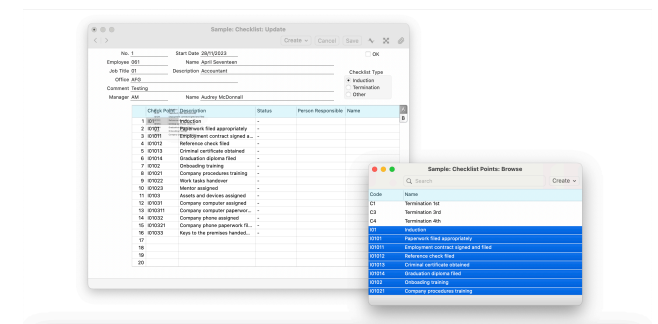
Different types of checklists are quicker to create if you code the checklist points by type: e.g all Induction checklist point's codes start with the letter 'I', all job changes for examples with 'C' and all Termination with 'T'. You can use checklists also for any repetitive task throughout your organisation, including audits and maintenance checks.

Checklist points can differ between industries and companies, but if you want to get inspiration of how HansaWorld uses checklists, please contact your local HansaWorld representative.

## The Checklists Register

To create a new checklist go to module Human Resources Management > Registers > Checklists. Fill in the header with the Employee details. The job title will automatically paste from the Employee record. Choose the type of checklist: Induction, Termination, or Other. This will do three things:

- It changes the fields on the actual checklist report. When Induction is selected, the field 'Start Date' appears. When 'Termination' is selected, the fields 'Last Working Day' and 'Last Employment Day' appear in the header. And the checkbox 'Other' is for all other uses.
- Selecting a type allows you to report on the type of checklists.
- The type is also visible in the Browse window, in the rightmost column. A 0 in that column shows Induction checklists, a 1 shows Terminations and a 2 shows Other. The Browse window is sortable according to this column, listing all Checklists according to Type.



After filling the fields of the header, assign Checklist points to the matrix. As with all matrices in Standard ERP you can either fill in point by point using paste special, or you can drag and drop from the Checklist setting to fill in all relevant checklist points at once. If you coded the checklist points by area as described above, this creates comprehensive checklists in a matter of seconds. Make sure you drop in the first row of the matrix in left most field.

After, you can assign people responsible for each point. You can also send emails from the Create menu, for example to inform the responsible person of their checklist tasks. In this case, the checklist is automatically linked to that email.

As tasks on the checklist get done, you can change the Status field in the matrix to 'Work in progress' or 'Done'. If you change it to 'done', the date of completion will be filled in on flip B of the matrix.

## Reporting on Checklists

The Human Resources Management module has a report about Checklists called 'Checklist Points'.

The report allows you to check different dimensions:

- You can check all checklist points with a specific status for a specific employee: for example which points does John Doe have outstanding?

No.	Employee	Name	Checklist Point	Comment	Person Responsible	Status	Date Completed
2	056	TEST 1					
			0	ONBOARDING	-	-	-
			0	ASSETS	-	-	-
			0	ASSETS	-	-	-
			0103	Assets and devices assigned	055	Samuel Jaffacke	-
			01031	Company computer assigned	055	Samuel Jaffacke	-
			010311	Company computer paperwork signed	062	Another Seventeen	-
			01032	Company phone assigned	055	Samuel Jaffacke	-
			010321	Company phone paperwork filed	062	Another Seventeen	-
			01033	Keys to the premises handed out	055	Samuel Jaffacke	-
			0		-	-	-
			0		-	-	-

- You can reverse this and check which point has he already received? Depending on the nature of the checklist, this can allow you to check if the employee has completed a specific phase and is ready for phase 2.

Check Point	Description	Status	Person Responsible	Name
1 01	PRIOR EMPLOYMENT	-	9000000	HR Manager
2 0105	New employment Contract is signed	Done	9000000	HR Manager
3 0107	Contact Card is updated in Standard ERP	Done	9000000	HR Manager
4 0101	Access groups changed	Work in prog...	9000000	HR Manager
5 0110	Training plans for new position created	Work in prog...	9000000	HR Manager
6 0112	Employee record updated in Human Resources module	Done	9000000	HR Manager
7 0		-	-	-
8 02	FIRST DAY	-	-	-
9 0207	Employee added to group new chnts	-	9004044	Department manager
10 0208	New devices assigned	-	9002885	Local Bookkeeper
11 0209	Paperwork for new assets signed	-	9002885	Local Bookkeeper
12 0		-	-	-
13	CLOSING THE PREVIOUS POSITION	-	9000000	HR Manager
14 101012	Task hand-over done	-	9000000	HR Manager
15 103007	Other assets returned if applicable	-	9000000	HR Manager
16 0		-	-	-
17 03	ROLE INTRO BY THE MANAGER	-	9004044	Department manager
18 0301	Introduction to work tasks (by direct manager)	-	9004044	Department manager
19 0302	Department Policies & Procedures	-	9004044	Department manager
20 0303	Performance expected over specified timeframe	-	9004044	Department manager
21 0304	Training and future development opportunities	-	9004044	Department manager
22 0		-	-	-

- You can run the report per Person Responsible. That allows you to check any points with a specific status for a specific person responsible: which ones has this person already completed? Which points are in progress or still outstanding per Person Responsible?

No.	Employee	Name	Checklist Point	Comment	Person Responsible	Status	Date Completed
2	056	TEST 1					
3	057	TEST 2					
			01	Induction	055	Samuel Jaffacke	Work in progress
			0101	Paperwork filed appropriate/055	055	Samuel Jaffacke	Work in progress
			01011	Employment contract signed and filed	055	Samuel Jaffacke	Work in progress
4	058	TEST 3					
			01012	Reference check filed	055	Samuel Jaffacke	Work in progress
			0103	Assets and devices assigned	055	Samuel Jaffacke	Work in progress
			01032	Company phone assigned	055	Samuel Jaffacke	Work in progress
			010321	Company phone paperwork filed	055	Samuel Jaffacke	Work in progress

- You can check if a specific point has already been completed for all employees, or is still open. Depending on that, these can be grouped and assigned.

No.	Employee	Name	Checklist Point	Comment	Person Responsible	Status	Date Completed
1	061	April Seventeen	01	Induction	055 Samuel Jaffacake	-	
4	058	TEST 3	01	Induction	055 Samuel Jaffacake	-	

In conclusion, for anything in your company that needs a checklist, StandardERP has this electronic checklist register.