Greentree®
PRIMED FOR BUSINESS

HR MANAGEMENT

OCCUPATIONAL
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HR MANAGEMENT

KEY BENEFITS

· Detailed employee information

· Job functions

· Curriculum Vitae

· Skill search

· Grievances

· Disciplinary actions

· Integration to Payroll

· Committees

· Powerful security

· Related person maintenance

· Record status

· Attachments

· Extensive reporting capabilities

· Occupational Health & Safety

· Incident maintenance

· Integration to CRM

Effective management of your organisation's personnel begins with maintaining accurate and detailed records of their attributes and capabilities. Only then can Management obtain a clear picture of the human resources at their disposal and in turn, the organisation's collective capacity. Greentree Human Resources Management (HRM) provides the tools to create a human resource information system that forms the basis of your organisation's workforce planning and analysis.

Detailed employee information

Greentree's Human Resource Management captures a comprehensive range of information for each employee, including contact details, next of kin, leave balances, medical history, staff development, payroll, allocated roles, curriculum vitae plus all events that are relevant to employee.

Job functions

Virtually every organisation has standard functions that are fulfilled by employees. HRM allows these functions to be defined and allocated to employees as they take on new roles and responsibilities. Using standard functions, HR Managers can ensure that when new functions are assigned to employees, the employee is suitably qualified and equipped to successfully carry out the tasks required.

The functions defined and documented can range from formal job descriptions to informal 'everyday' tasks. Each time a new job function is assigned to an employee, HRM adds this assignment to log of the functions that the employee has been allocated. Users can view the employee's tenure in each job function and which ones they are currently performing.

Curriculum Vitae

A full account of each employee's Curriculum Vitae (CV) can be kept either as a structured database record, or as a freeform word processing or scanned document attached to the employee record.

The CV details include certification, training, skills, education and prior employment. HRM allows you to attach relevant documents to each of the CV items, for example certificates, degrees, licences etc., as well as letting you create links to other pertinent records within Greentree.

> "I was initially surprised that Greentree wasn't a more expensive system since it did some things that the more expensive systems had trouble with."
>
> **Rachel Robinson,** Financial Controller, Keratec

Skill search

HRM's Skill Search allows perform powerful searches to be performed on the employee database, based on each employee's CV details.

An unlimited number of search filters can be nominated, and broken down into Requirement/Type/Level.

There is also the option of specifying whether an employee needs to match any or all of the specified criteria. When the 'any' option is chosen, search results are ranked in order of percentage of criteria that are met.

Grievances

HRM allows you to capture any grievances that occur within the organisation. This important information is critical in ensuring that an appropriate resolution is achieved.

The Grievance Maintenance screen records the type of grievance, e.g. workplace bullying, the key people involved in the grievance and the outcome(s). Grievances can be recorded by both employees and external parties.

Disciplinary actions

The Disciplinary Action function can take full account of the circumstances and outcomes arising from the action taken. Disciplinary Action Maintenance is comprised of an extensive range of fields to ensure that all critical details relating to the disciplinary action are recorded.

These fields include people involved in the disciplinary action, any hearings and appeals, and a log of any events that transpire once the action is taken. In times where a grievance requires disciplinary action, it can be easily cross-referenced.

Committees

The Committee feature records the formation and affairs of the committees formed within an organisation and can include both employees and external parties.

Committee Maintenance captures important information related to the committee's status and purpose, its past and present members and their role within the committee, the committee's meetings and any other applicable events.

You can also use Committees to distribute meeting agendas, invitations and minutes to relevant members, via mail merge or email.

Related Person Maintenance

When events take place that involve other people, HRM uses the Related Person function to add each person, be they an employee or external person, to the HRM record. When users view the record, and its related people, they can drill-down on the person's name to retrieve that person's details instantly, along with a section for freeform notes that relate to the particular event.

Record status

To cater for even the most dynamic workforce, HRM allows you to activate, deactivate and reactivate records, as circumstances require. This is particularly useful for organisations that use contract or casual labour on a regular basis.

Attachments

HRM allows users to attach files of any format to any of the HRM records. Typical examples would include résumés, licences, certificates or incident reports.

Each attachment is catalogued with summary information and stored in a tightly compressed format. These attachments can be opened and printed directly from Greentree at any time.

Extensive reporting capabilities

HRM is supplied with a range of standard reports that provide insight and breakdowns required by most organisations.

Powerful security

Given the potentially sensitive nature of employee information, HRM is equipped with an intricate security model, which while being functionally sophisticated, is straightforward to setup and maintain.

Security gives the option of being able to designate whether users are able to access Payroll functions and data, HRM information or both. HRM facilitates security rules that be applied to an individual, or a team's ability to perform functions and to access particular records. Importantly, each individual's records can be secured, so that only certain users can access those records.

> "Using Greentree 'trees' is an excellent way to organise our information. We are more productive and efficient with the tools we have available."
>
> **John De Wever,** Financial Controller, Medical Council of NZ

For example, management's staff records could be restricted to select people who handle the executive payroll and HR functions. The security settings within the HRM suite are respected in all reports, enquiries and maintenance screens.

Organisation charts

Define organisation charts based on the hierarchy of positions that have been established. The organisation chart can be viewed to show this hierarchy and the employees that belong to those positions as well as output to Microsoft Visio®.

Occupational Health & Safety

By using Occupational Health & Safety (OH&S) you are ensuring that any foreseeable workplace hazards are avoided, and if and when incidents do occur, the details are accurately recorded and the correct procedures are followed to resolve any arising issues.

Incident Maintenance

The Incident Maintenance screen allows users to input and view all of the necessary information relating to workplace incidents. Available fields relate to the person(s) injured, the surrounding circumstances, the people involved at the scene and the ensuing events that occur.

Integration to Greentree Payroll*

HRM and Payroll are fully and reciprocally integrated, where any data HR or Payroll data entered against an employee is automatically reflected in the corresponding record. Users with appropriate security privileges can perform HR and Payroll employee maintenance functions from the one screen.

Integration to Customer Relationships Management (CRM) suite

In many cases, the events that are captured in HRM involve people who are not employees of the organisation. HRM is integrated with Greentree's CRM Contacts & Relationships module so that external parties can be entered as 'contacts' and their details stored in Greentree for future reference.

> "Greentree is very responsive and the real time processing really aids the decision making process and reporting. With no more batch delays and updates to wait for, we are more proactive and have the real information at our fingertips."
>
> **Eric Gillott,** Financial Accountant, AS Wilcox

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Greentree ERP System Specialists

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