ERS Bio Support Pack



PRODUCT SUPPORT PACK

ERS Bio Integration Project Description

PRODUCT AWARENESS

Product Vision & Mission

Product Introduction

"Sales Pitch" formulated by Product Owners and/ or Integration Partner on what the solution exactly is.

Product Demo

Demo on completed product / Access Details. Links to design Mock-ups, etc.

Development Phases

Expected Phases for roll-out of the product.

Client Focus

Who will the product be aimed at:

• Specific Clients

Client Billing Structure

- What will the client be billed for this product
 - Recurring Costs
 - Subscription with regards to ERS Bio
- Will there be annual increases.
 - This is subject to the subscription has taken with the third party
- How will the billing be calculated (Flat Rated / All Employees / Active Employees / Per Usage, etc). TBA
- Any additional agreements as per SLA. TBA

IMPLEMENTATION PREREQUISITES

Document Templates, Policies & Forms

- Any applicable document templates, policies and/ or forms that need to be implemented to ensure a successful product (i.e. Company disciplinary Code needs to be in place prior to the use of the Employee Relations Module).
- N/A

Agreements & Subscriptions

Any agreements/ subscriptions that the Client needs to have in a place with a 3rd party/ integration partner
 A client needs to request a Token from ERS Bio, in order to use it as part of his or her PSIber Integration

Hardware

- Any applicable hardware that the client must acquire in order for the product to function (i.e. Fingerprint scanners for Criminal Checks)
 Clock devices
 - ERS Bio Software installed

SETUP & PARAMETERS

System Setup / Parameter Settings

- · System Setup / Parameters that need to be in place to ensure a fully functional product
- 1. Overtime Setup
- Setup Overtime for first time use of the Time and Attendance module, to access the overtime set up the user needs to follow these steps:
- Go to Income Funds and Deductions



• Select the 5th tab "Overtime", add overtime parameters by clicking on the plus sign

F	PSIber Compar	ny : F DA Testing 🗸 🗸	Payroll : Dummy Payroll (Monthly 🔽			8 8	Hi, Phumeza Gaba	!		
	Home > Company Setup & Mainter Payroll Management / Incon	nance > Payroll Setup >	Income, Funds & Deductions			Switch to Emplo	oyee Package 🔳			
	Allowances Fringe Benefits Bonus Funds & Deductions Overtime									
						⊕ 2	₽			
	Description	Overtime Type	Previous OT Profile / ROP Interval	Payslip from when Last ROP Change	Factor	Rand Value	Accrue			
	Backpay Overtime 1.5	Factor	No	No	1.5000	0.0000	0.0000			
	Backpay Overtime 2	Factor	No	No	2.0000	0.0000	0.0000			
amo	Overtime 1.5	Factor	No	No	1.5000	0.0000	0.0000			
ĭ	Overtime 2	Factor	No	No	2.0000	0.0000	0.0000	Ę		
	Overtime Rand Value	Rand Value	No	No	0.0000	1.0000	0.0000	OTH		
Se	Standby Overtime	Factor	No	No	1.3300	0.0000	0.0000	atio		
urite	Standby Overtime Backpay	Factor	No	No	1.3300	0.0000	0.0000			
-avo										

- Enter an Overtime description
- Select an Overtime Type
- Previous Overtime Profile or Rate of Pay interval
- Payslip from when Last ROP change
- Factor
- Use the green button with the correct sign to save changes
- · Use the red button with the cross sign to cancel all changes

Overtime			ta 🔂 🗟
Description	Overtime Type	Previous OT Profile / ROP Interval	Payslip from when Last ROP Change
	Factor ~	No ~	No ~
Factor			
0.0000			

2. Create Interface Codes

	Der C	Company : A001: QA Testing	Payroll : • Dummy Payroll (Monthly	Employee :	Incl. Non-Active?	н, 🚯 🍰 🔇	Phumeza Gaba!
Home >	Company Setup &	Maintenance > Company	Setup > Setup & Parameters	dr.		1	
			<u>ළ</u> ප^ප	BB BB	B		
	Compa	ny Parameters	ESS Parameters	HRM Parameters	HR Parameters	Interface Codes	

• Select payroll to add interface code to

	PSIDER Company : People Management Systems) `			H 88 (li, Phumeza Ga	ba!				
	Home > Company Setup & Maintenance >	Company Setup > Setup & Parameters	> Interface Codes								
	Interface Codes Switch to Mass										
	Payroll Entry Group Package Entry Type Consolidated v Normal Earnings v										
	Edit Interface Codes										
	Payroll	Description	Interface Code	Reporting Code Description	Reporting Code						
	Dummy Payroll 3 (Dummy Payroll 3) 🗸 🗸										
me	Dummy Payroll 3 (Dummy Payroll 3)	Normal Cash Pay		Normal Cash Pay							
운	Dummy Payroll 3 (Dummy Payroll 3)	Public Holidays Worked					5				
	Dummy Payroll 3 (Dummy Payroll 3)	Annual Leave Paid	1450a	Leave Pay	1450a		forn				
S	Dummy Payroll 3 (Dummy Payroll 3)	Annual Leave Unpaid	1440	Leave (Paid/Unpaid)	1440		latio				
Favourite	Dummu Douroll 2 (Dummu Douroll 2)	Siek Lagun (Daid/Lippaid).					<u> </u>				

• Enter the interface code and save to keep the setting

		Company :				Hi, Phumeza	a Gaba!
F	People Management Systems	Edit Interface Codes) 🔾 📋	
		Payroll	Description	Interface Code	Reporting Code Description		
	Home > Company	Dummy Payroll 3 (Dummy Payroll 3) ~	Normal Cash Pay	1.51	Normal Cash Pay		
	Interface Codes	Reporting Code				loyee Transfers	-
	Payroll	1250					
	Consolidated						
	Edit Interface Cod					ľ	=
	Payroll						
me							
Н							
	Dummy Payroll 3 (Dur						
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- Save the interface code/s
- 3. Payroll Setup
 - A user must set up their Payroll to ensure that Time Costing is enabled. To do this, a user will access the functionality on the following screens:
 - Go to Company Setup & Maintenance on PSIber which is located on the Dashboard

PSI People Mana	ber Company : A001: QA Testing	Payroll :		Hi, Phu 🔒 🔒 🝳 (Hi, Phumeza Gaba!		
Favourites Home	Dashboard Human Resource payroll and other important statistics in dashboard format for easy use and strategic decision making.	Human Capital Management Your day-to-day management of human capital within your business from onboarding to exit and everything in between.	Company Setup & Maintenance Sorthe setup of your company setup of your company setup of your company setup certains as all legislative settings and parameters.	Reports Monthly, quarterly and annual capital requirements including legislation and financial reporting.	Favourites Your quick and easy link to all your favourite screens.	Information	
	View	View	View	View	View		

• Select the Payroll Setup icon



4. Payroll Setup and Payroll Parameters, select the second tab: Pay and Statutory Information

- Go to the bottom of the setup under the Time Costing Tab; select "Enable Time Costing".
 Capture Hours Worked as well as Default Hours
- Default hours can be set to: Actual Hours worked as well as Exceptions

Payroll Managemer	it / Pay	enance > Payroll S roll Parameters	etup > Payro	Il Paramete	ers						Switch to Payro	Il Processing
Payroll Dates Pay and	d Statutor	y Information Shif	ts Partial Pe	eriod Calcu	lation Type	legate Tax T	ax Parameters	Retirement Reform	ESS Paym	ents Payslip	Entry Splits Mandatory Fi	elds
lormal Working Hour	s											
Payroll	•	Payment Rate		Hours p	er Day	Days pe	r Week	Hours in Pay	Period	Hours per Mo	nth Work We	eek
	~		~	Min	Max	Min	Max	Min M	ax	Min	lax	
Payroll 3 (Payroll 3)		Monthly		8.00		5.00		173.36		173.36	Setu	Work Week
Payroll 12 (Payroll 12)		Monthly		8.00		5.00		173.36		173.36	Setu	Work Week
ABG Consulting (Payroll 18	3)	Monthly		8.00		5.00		173.36		173.36	Setu	Work Week
ADM Consulting (Payroll 10) Monthly		Monthly		8.00		5.00 173.36			173.36	Setu	Work Week	
ime Costing												
			Capture % Splits or Hours Worked ?			Default Hours to :						
Enable Time Costing			Hours Worked			~	Actual			~		
Allow ESS Employee to Cap	ture their o	wn Hours	Allow MSS Ma reporting to th	inager to Cap tem	ture Hours for Emp	bloyees	Allow MSS or E Costing Record	ixternal User to be linked Is	to specific Time			
intry Types for Time	Costing										Ð	2 1
Entry Type	Scre	en Description	Screen Po	sition *	Exclude Mon	thly Paid Emplo	yees Include	e Normal Hours Total	Include Pe	ercentage Split	Include in Total Shifts	Shifts
Acting Allowance Rock Do	Actin	g Allowance Back Pay	1		No		No		Yes		No	Calculate S

- 5. Time and Attendance Setup
 - Create the Time and Attendance Setup by selecting the highlighted icon

		mpany : 001: QA Testing				Hi, Phumeza Gaba! 🔠 💽
	Home > Company Setup & Ma	aintenance > Company Setup > Third I	Party Setup	870 870	6	
Home		Time & Attendance Setup	Moodle Setup	Mpowered	Verification	Inform
Favourites						aation

Select the ERS Bio attendance type and insert the Token provided to you, save

	Company : A001: QA Testing	880
Home > Company Setup &	& Maintenance > Company Setup > Third Party Setup > Time & Attendance Setup	
Token Setup Interface C	Codes Setup Employee Mapping	
		5.00
Type ERS Bio	Token eb6100add8154c6a9ef738de444ecfb4	
3		

- Select the payroll you are setting up for the Time and Attendance
 Update codes from Time and attendance

ŗ	PSIber Company : People Management Systems Company : A001: QA Testing •	880)
	Home > Company Setup & Maintenance > Company Setup > Third Party Setup > Time & Attendance Setup Time & Attendance Setup	E	
	Token Setup Interface Codes Setup Employee Mapping	≡	
	Dummy Payroll 2 (Dummy Payroll 2) V Update Codes From T/A Interface Code Mapping	0 î ≡	
Home	Payroll Interface Code TIA Interface Code		Infor
Favourites			mation

Select the Payroll Interface Code you created



• Employee mapping

	PSIbel People Management S	vstems Company : A001: QA Te	esting	I ▼				Hi, Phur 民 🖧 🔍 🕯	neza Gaba!
	Home > Com	npany Setup & Maintenance	e > Company	Setup > Third Party Set	tup > Time & Attendance Setup				
	Time & Atte	ndance Setup							
	Token Setup	Interface Codes Setup	Employee Ma	apping					
			_					Show Payroll Employees OF	F 🔳
	Link	T/A Name	•	Payroll Name	Payroll Employee Number	T/A Export Code	Status	Active Payroll	
	Link	API1 MessV2							
ame	Link	Jekyl Nkonwana				1			
ĭ	Link	John Smith				321			Ę
	Link	Name Surname				123			o m
S	Link	Noma Ngubane				1234			atio
urite	Link	Noma Ngubane				1234			3
avo	Link	PSIber Employee				WKLY 1			
ш									

• Link the employees to the payroll being processed, save.

	DSIbe	n /	Company :									
		t Systems	Employee Linking					5. 🛛		Â	0 🗎 (
			Name									
	Home > Co	ompany	API1 MessV2									
	Time & At	Employee Sele										
	Token Setu	p Inte	Payroll *	Full Name	ld Number	Passport Number	Employee Number	Engagement Date	Er	L.		
				API						L	OFF	
	Link	T/A	ABG Consulting	Nozipho Mohapi	6307183864167		QA0174	4 May 2010	Ac	L		
			ABG Consulting	Tapitha Oberholzer	6901272010151		QA0275	11 August 2011	Ac	L.		
			ABG Consulting	Hapiness Mntambo	7611123150143		QA0692	1 March 2007	Di	١.		
	Link		ADM Consulting	Edra Kapia	8603113125143		QA0925	10 July 2017	Ac	L.		
	Link		AGB Consulting	Hapiness Lebogo	6201042582153		QA1023	1 January 2013	Di			
	Link	Nam	AGB Consulting	Uaturapi Sebothoma	6203121275139		QA1096	4 May 2006	Ac			
	Link	Nom	AGB Consulting	Dweba Mogapi	9305187455112		QA1252	1 October 2006	Ac			
	Link	Nom	AMD Consulting	Thikhathali Vekarapi	7409195147059		QA1815	9 September 2002	Di			
	Link		AMD Consulting	Lungi Kapia	7207105008001		QA1877	1 July 1999	Di	11		
			AMD Consulting	Ryen Kapia	9708056526071		QA1888	2 August 2010	Ac	L.		
			Applicants	Hapiness Moiloa	5907203157186	HKG8N59WKGDV	APPL45	1 March 2016	Ac			
			Botswana	Blessing Vekarapi	9508176023169		QA1443	15 October 2014	Ac			
			Botswana	Kelapile Nyerenda	914614114		1211	6 June 2016	Ac	1		
			Botswana	Keolapile Sebolai	012018004		1212	6 June 2016	Di			
			NN Consulting	Naapopye Hijakaezapi	6301194027120		QA9331	19 March 2012	Tr			
			Payroll 3	Uaturapi Hangala	6901243254060		QA9629	22 September 2003	Di	-		

6. Report

• Import the report from ERS Bio onto PSIber

P	Company : ecople Management Systems	ting v			🖲 🖧 🔕 🖨 💽
	Interval				A Court Island
	February	✓ Import		Close Interval	Open interval
	Week	Cost Centre	Department	Division	Capture Status
	Week # 3				Pending
Home	Hours Worked Detail Employee Number	Employee Name	Employee Surname	Leave Pay	Total =
	189637	Ntando	Tyana	40.00	40.00
ŝ	ABC2 APP	Robin	Willemse	20.00	20.00
urite	APPL2	Abraham	Augustyn	52.00	52.00
avo	APPL3	Lisa	Le Roux	12.00	12.00
ш	APPL4	Kaye	Becker	25.00	25.00
	APPL5	Liesl	Ncheka	75.00	75.00

7. Time Costing

• Select Human Capital Management on the Dashboard



• Select Payroll Management

F		Company : A001: QA Testing	Payroll : Dummy Pay	Employee :	v 📕 Incl. Non-Active?	Ľ	B 🖁 Q) 📋 💽	
Home	Home > Human Capital I	Management Empl	oyee Maintenance	Human Resource Management	Payroll Management	Leave Management			Inf
Favourites									ormation

Select Mass Input



Select Time Costing



• Select an interval

		Company : Pay A001: QA Testing V Du	roll : nmy Payroll (Monthly 🔽		880		
	Home > Human Capital M Time Costing	Management > Payroll Management >	Mass Input > Time Costing		Switch to Employee Payslip Adjustments	=	
	Hours Worked (Week / Co	st Centre / Department) Shifts Worked	(Interval) Actual / Theoretical Percentages (Cost C	Centre / Department)			
	Interval						
	November	~	Import	Close Interval	Open Interval		
					€ 2 1	-	
ре	Week	Cost Centre	Department	Division	Capture Status	-	
Hor							Inform
ourites							ation
av							

• Capture hours for the selected interval, save.

	⊃Slher⊘	Company : Pa	yroll :						
F	eople Management Systems	Hours Worked Setup			E⊗ .				
		Filter Employees by Base							
	Time Costing	Cost Centre	Department	Employment Type			lip Adjustments		
	Hours Worked (Wee	Select Option 🗸	Select Option v	Select Option 🗸					
	Interval	Capture Hours for the Following							
	November	Week	Cost Centre	Department	Division	 		=	
	Week	Week # 2 ~	Select Option v	Select Option 🗸	Select Option	~			
									Info
urites									
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• Import hours for Time Costing

		Company : Payro A001: QA Testing V	ll : my Payroll (Monthly 💌		880	•
	Home > Human Capital M Time Costing	Management > Payroll Management >	Mass Input > Time Costing		Switch to Employee Payslip Adjustments	=
	Hours Worked (Week / Cos	st Centre / Department) Shifts Worked (I	nterval) Actual / Theoretical Percentages (Cost Cen	tre / Department)		
	Interval					
	November	· · ·	Import	Close Interval	Open Interval	
Ð	Week	Cost Centre	Department	Division	Capture Status	
E C	Week # 2				Pending	
<u> </u>						Informat
rites						Ön.
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• Import Hours

ļ		Company : A001: QA Testing	Payroll :	Import Optio	ns	×		Hi, Phumeza Gal	ba!
	Home > Human Capital N Time Costing Hours Worked (Week / Con-	Management > Payroll Ma	anagement > Mass Input > 1	Import From	ERS Bio Ok Cancel		Switch to Employee Payslip	Adjustments 🗮	
	November	~	Impo			Interval	Open Interval		
	Week Week # 2	Cost Centre				ion	Capture Status Pending		Inform
									ation

• Select the start date and end date of the hours being imported, save

PSIher ()	Company : Payroll :		Hi, Phumeza	a Gaba!	
People Management Systems	ERS Bio Hours Import	≥ ≤			
Home > Human Ca	Week Week # 2				
Time Costing	Start Date End Date		lip Adjustments	≡	
Hours Worked (Wee	(a) 01 03 2019 C (a) 03 2019 C				
Interval November					
			• 2 t	=	
Week					
Week # 2					

• A validation message will be displayed for the generation of the report

Week	
Week # 2	
Start Date	End Date
■ 01 02 2019 ○	15 02 2019 ○
	Information
	The Reports from ERS Bio need to be generated. As such an item will be created for you once we
	receive the reports. Click Yes to conitnue
	Yes No

• A request for the report is sent to ERS Bio

Week								
Wee	k # 2			~				
Start	Start Date				End Date			
	01	02	2019	0	15	02 2019 🖸		
						Please Note		
						Report requested		
						Close		

• Results are generated and displayed as follows:

People Management Systems	y . DA Testing			8801
Interval				and the second
February		прот		open interval O 2 î ≡
Week	Cost Centre	Department	Division	Capture Status
Week # 3				Pending
Hours Worked Detail Employee Number	Employee Name	Employee Surname	Leave Pay	Total
Hours Worked Detail Employee Number 189637	Employee Name	Employee Surname	Leave Pay 40.00	Total 40.00
Hours Worked Detail Employee Number 189037 ABC2 APP	Employee Name Nlando Robin	Employee Surname Tyana Willemse	Leave Pay 40.00 20.00	Total 40.00 20.00
Hours Worked Detail Employee Number 189637 ABC2 APP APPL2	Employee Name Nltando Robin Abraham	Employee Surname Tyana Willemso Augustyn	Leave Pay 40.00 20.00 52.00	Total 40.00 20.00 52.00
Hours Worked Detail Employee Number 189637 ABC2 APP APPL2 APPL3	Employee Name Ntando Robin Abraham Lisa	Employee Surname Tyana Willemse Augustyn Le Roux	Leave Pay 40.00 20.00 52.00 12.00	Total 40.00 20.00 52.00 12.00
Hours Worked Detail Employee Number 189637 ABC2 APP APPL2 APPL3 APPL4	Employee Name Nlando Robin Abraham Lisa Kaye	Employee Surname Tyana Willemse Augustyn Le Roux Becker	Leave Pay 40.00 20.00 52.00 12.00 12.00 25.00	Total 40.00 20.00 52.00 12.00 25.00

Compliance

- Does the product comply with legislative demands, specify applicable legislation Complies with the Basic Conditions of Employment Act: Application of the Act Section 3
 Does the product align with industry Best Practises / Blueprints, provide details

SYSTEM EXPECTED BEHAVIOUR

System Behaviour

- What can be expected in terms of behaviour, validations, etc (What, When, Where & How)
- When the Fill Up rule option is selected

ERS Bio Hours Import									
Week Week # 1	~	🕑 Use Fill Up Rul	es		F	Fill Up Rules Select Option			
Start Date Image: 06 06 2019	0	End Date	06	2019	>				
Hours									
Employee N First Names				Surname			Interface Code	Hours	
								Min	Max
				Invalid	Se	election			
				Please sele	ect a	Fill Up Rule			
					Clos	e			

Employee Linking				and a state of the) =
Name						
Employee Selection						
Payroll ^	Full Name	ld Number	Passport Number	Employee Number	Engagement Date	Er
'REAL LIMITED'	Amelia Akooko	8407103864178			1 July 2018	Tr
'REAL LIMITED'	Greer Barnes	73	k Confirmation		2 February 2018	Ac
'REAL LIMITED'	Mavusani Cira	61	K Commination		2 March 2018	Tr
'REAL LIMITED'	Corporations Vaadin	Are you sure y	ou want to link 1 to Frank Ben	1?	1 April 2018	Ac
'REAL LIMITED'	Rose DeWitt	78			2 January 2018	Ac
'REAL LIMITED'	Conrad Gagilo	66 Y	es No		1 March 2018	Tr
'REAL LIMITED'	Grant Good	91			10 January 2018	Tr
'REAL LIMITED'	Pinney Grant	7005227112168			2 July 2017	Tr
'REAL LIMITED'		6907052074002		QA3	1 December 2017	Tr
'REAL LIMITED'	Archford Hesekiel	7208139281028	VAT1A8WPIFL9	63	1 July 2016	Tr
'REAL LIMITED'	Andries Hahn	9008218541153	A8855566	339	1 April 2019	Ac
'REAL LIMITED'	Style Hendeon	9502206011039		QA1	1 November 2017	Ac
'REAL LIMITED'	Richard Jenkins	7507228202013		EE1	1 August 2017	Tr
'REAL LIMITED'	Mantshadi Kadhikua	9010181034158	Hw2e32e33		2 June 2018	Ac

Import Result		+	×
0 Records Created			
0 Records Updated			
0 Records Deleted			
0 Records Unaffected			
0 Records Failed			
0 Records Total			
Error Log			
Print	Close		

Calculate Time and Attendance hours accurately
Ensure that the push and pull of information between the two systems work seamlessly

Points of Failure

- Elements that could go wrong (i.e. Tokens, Passwords not supplied, i.e. Company policy
- not in place, etc)
 - Employee data is not successfully pulled
 - Export a report from ERS Bio is taking too long
 - Hours are not calculating accurately
 - · Fill-up hours are not set up correctly

AFTERCARE

Service Level Agreements

• Any applicable SLA between PSIber and a 3rd party/ Integration Partner that is in place.

Escalation Paths

- Internal (PSIber Support)
- External (3rd Party/ Integration Partner aligned with SLA
- Request Process
 - 1. An email request is sent to support@ersbiometrics.co.za requesting that a token be created for PSiber integration
 - a. Support must be provided with the clients ERS Account number.
 - 2. ERS Support verification:
 - a. Ensure that there are No blank time types created on the account, correct where applicable.
 - b. Rename the default system user to "Do Not Delete" as removal of the user will disable the linkage.
 - 3. ERS Support Token Creation
 - a. Support will create the token via Admin => Admin => Employee API Token
 - b. Support will activate the API via Manage Accounts => Account Extras => Allow API
 - 4. ERS Support Testing
 - a. Support will test the token by replacing the word Token in the below api link with the token generated for the specific account.
 - b. Copy the test api link that the token has been added to and paste to the web browser and verify that the data is correct. Test link

http://r13.58.ersbio.co.za/api/data_client.php?t=Token&to_do=get_tna_clocks&imei=0&last_id=1&date_from=2019-02-10&date_to=2019-02-14&export=0&display=2&display_extras=1

- 5. Support Token issued
- a. Support will email the token to the requester
- b. Support will close the ticket
- Expected turn-around time: 4 Hours 6 hours

Escalations: Lisha@ersbiometrics.co.za | Clemens@ersbiometrics.co.za

FAQ

• FAQ's and Answers that a typical user might ask throughout the journey.

Client Welcome Letter

 Information that can be supplied to the client upon activation/ implementation of the product (typically a "watered-down" version of this document.

SUPPORT PACK TRAINING / HAND-OVER

Date	Consultant	Signature

END OF DOCUMENT